Council Report

Report Number:	**ED2022-047**
Meeting Date:	December 13, 2022
Title:	**2022 Kawartha Lakes Business Count**
Description:	An overview of the 2022 Kawartha Lakes Business Count survey and Insight Report
Author and Title:	Rebecca Mustard, Manager of Economic Development

Recommendation:

That Report ED2022-047, **2022 Kawartha Lakes Business Count**, be received.

Department Head: _____

Financial/Legal/HR/Other: _____

Chief Administrative Officer: _____

Background:

The annual Kawartha Lakes Business Count project was initiated in 2021 to provide the municipality with in-depth information to understand and strengthen the local economy, as well as inform policies and programs. The objectives of the project are to:

- Provide a snapshot of the Kawartha Lakes economy
- Provide enhanced regional employment and workforce data
- Assist in making informed decisions related to job and economic growth
- Enhance communication channels between businesses and the municipality

This report provides an overview of the 2022 Kawartha Lakes Business Count project and Insight Report.

Rationale:

The 2022 Kawartha Lakes Business Count project built on the inaugural 2021 project. The project aimed to survey employment properties and businesses surveyed in the 2021 project, and expanded into additional geographical areas. The survey was scoped to downtowns, several commercial areas, and industrial areas, including:

- Downtowns of Bobcaygeon, Coboconk-Norland, Fenelon Falls, Omemee, and Lindsay
- Commercial areas along Kent Street, Lindsay
- Industrial areas were surveyed in Fenelon Falls, Lindsay and Pontypool
- The survey was also available online for all businesses to participate

Survey Methodology

The 2022 Kawartha Lakes Business Count Project was conducted from July to August, 2022. The survey was delivered (1) in person following pandemic protocols, (2) by phone and (3) online from the municipal website at www.kawarthalakes.ca/businesscount.

Surveys were coordinated and conducted by the Kawartha Lakes Economic Development Summer Student team. Local Chamber of Commerce Summer Students, supported by the 2022 Kawartha Lakes Summer Tourism Enhancement Funding, conducted the survey in the respective downtown areas. The Lindsay Downtown BIA conducted surveys in Downtown Lindsay. Once data was collected in the field, it was reviewed for completeness and quality.

The business count survey is designed with questions that can be compared across other communities conducting business count projects, as well as custom questions that are unique to Kawartha Lakes. Analysis can be conducted in multiple ways to gain insights into the local economy including by community, employment, and business activity. As the Business Count project continues to be delivered annually, insights can then be compared year over year to track changes in employment and business activity across the municipality.

Individual business data collected through the project remains confidential and is only shared to the public in aggregated form (see the report in Appendix 1). The raw data was shared between the City of Kawartha Lakes and the respective Chamber of Commerce, and Lindsay Downtown BIA in the area the business is located in. These partnerships were clearly communicated to respondents prior to participating in the survey.

Partner Organizations

The project is led by the City of Kawartha Lakes in partnership with the Bobcaygeon & Area Chamber of Commerce, Coboconk, Norland & Area Chamber of Commerce, Fenelon Falls & District Chamber of Commerce, Lindsay & District Chamber of Commerce and the Lindsay Downtown BIA. The partners were ambassadors for the project and helped promote and conduct the survey, and each also received data specific to their community.

2022 Business Count Insights Report

The 2022 Kawartha Lakes Business Count Insights Report provides an overview of aggregate survey findings. It provides a valuable preliminary insight to the mechanics of downtowns, commercial, and industrial areas in Kawartha Lakes. The findings are specific to the businesses surveyed and are not representative of businesses across Kawartha Lakes. The data is also not a complete data set of every business and property in the focus areas, although surveyors aimed to be as thorough as possible. Therefore, the analysis must be read in the context in which it is presented. As the Kawartha Lakes Business Count continues as an annual project, the data integrity will improve and wider geographies across the municipality will be included in the analysis.

The Insights Report is organized into four sections. The first section is Kawartha Lakes and includes data from every business and employment property in the municipality that completed the survey. Three (3) communities had over 30 surveys completed and have their own subset of data included in a separate section of the Insights Report.

These communities are: Bobcaygeon, Fenelon Falls, and Lindsay. The geography included in the community specific analysis includes their downtown and industrial area, for examples, Lindsay includes all surveys from businesses and employment properties located in the downtown and east and west industrial areas. In each section of the Insights Report, a map is included to visually show the geography included in that specific section.

Communities without a specific section, e.g. Coboconk-Norland, Omemee, and Pontypool did not have enough surveys completed in this inaugural year to separate out the data set for analysis and maintain confidentiality. In these instances, the data is included in the Kawartha Lakes section, along with every survey that was completed across the municipality.

In each of the four sections, aggregate data analysis is shown on attributes including business activity, locations, employment and future plans.

Business activity is categorised by NAICS codes (North American Industry Classification System). To help share the data, NAICS codes were combined into five (5) broad categories.

Retail: retail trade (44-45)

Arts, Culture and Hospitality: Accommodation and food services (72) + Arts, entertainment and recreation (71) + Information and cultural industries (51)

Industry and Trades: Manufacturing (31-33) + Construction (23) + Transportation and warehousing (48-49) + Wholesale trade (41)

Services: Professional, scientific and technical services (54) + Finance and insurance (52) + Real estate and rental and leasing (53) + Administrative/support, waste/remediation (56) + Public administration (91) + Other services (except public administration) (81) + Health care and social assistance (62) + Educational services (61).

The 2022 Kawartha Lakes Business Count Insight Report is attached as Appendix A, and highlights aggregated data from the 525 businesses and employment properties that participated in the inaugural survey. The majority of data was collected from businesses located in the scoped survey areas of downtowns of Lindsay, Fenelon Falls, Bobcaygeon, Coboconk-Norland and Omemee and industrial areas in Lindsay, Fenelon Falls and Pontypool. The full data set for Kawartha Lakes is included as well as a subset of the data for the communities of Bobcaygeon, Fenelon Falls, and Lindsay.

2022 Kawartha Lakes Business Count Insight Report Highlights:

- 525 business participated in the survey.
- 4,175 is the total number of jobs identified by businesses that answered this question on the survey (2,985 full-time, 915 part-time, 275 seasonal). The Industry and Trades sectors averaged the highest number of full time employees by business.
- Retail and Accommodation and Food Service were the most interviewed industries, which is expected within the scoped survey area.
- 74% of business plan to hire in the future.
- Square footage reported by surveyed businesses 1,853,137 sq. ft.

The Kawartha Lakes Business Count project is scheduled as an annual manual data collection project. With each survey year, the number of business surveyed and quality of the data collected will continue to improve providing even greater insights into the local economy.

Other Alternatives Considered:

No alternatives have been considered.

Alignment to Strategic Priorities

The Kawartha Lakes Business Count project supports delivery of the 2020-2023 Kawartha Lakes Strategy Plan priority: A Vibrant and Growing Economy.

This project aligns with the Strategic Plan Mission: to deliver the highest standard of municipal services while creating a healthy and sustainable future for all Kawartha Lakes' residents and businesses, the Guiding Principle: Service Excellence to "seek to understand and meet the needs of those we serve" and to action the goal a Vibrant and Growing Economy.

Through the Kawartha Lakes Business Count project, reliable, accurate and in-depth data of the local businesses community provides an in-depth analysis of the Kawartha Lakes economy for informed decision making.

Financial/Operation Impacts:

The 2022 Kawartha Lakes Business Count was funded in the 2022 Operating budget. Data collection was conducted by the 2022 Economic Development Summer Student

team with support from the four Chamber of Commerce, and Lindsay Downtown BIA Summer Student teams.

The 2023 Kawartha Lakes Business Count project expenses are included in the 2023 budget. It is anticipated that the survey will be launched in the Summer and an Insights Report presented to Council in Q4, 2023.

Consultations:

Manager, Planning

Manager, Communications Advertising and Marketing

Data Analysis Coordinator

Bobcaygeon & Area Chamber of Commerce

Coboconk, Norland & Area Chamber of Commerce

Fenelon Falls & District Chamber of Commerce

Lindsay & District Chamber of Commerce

Workforce Development Board

Attachments:

Appendix A – 2022 Kawartha Lakes Business Count

Appendix A KL
Business Count Insight

Department Head email: rholy@kawarthalakes.ca

Department Head: Richard Holy, Director Development Services