

Torbay Economic Strategic Roadmap

Phase 1 Report:
Research and Consultation WorkBook

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TRACT

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1. PREFACE

This Phase 1 Report is presented in the form of a “**WorkBook**” for reference by Town staff and officials. It identifies/provides links to the documents which have been collected and/or been prepared during this Phase and summarizes the key findings from the Research and Consultation activity.

The **WorkBook** is intended to provide background information for the presentation and discussion at the Project Meeting with the Town of Torbay on Thursday, October 15th, 2020. It will also provide basis for development of a Gap Analysis related to the key pillars supporting economic development of the Town (Business Development and Town Development).

2. INTRODUCTION

2.1. PROJECT OVERVIEW

The Town of Torbay is undertaking the development of a comprehensive Torbay Economic Strategic Roadmap that speaks to the Industrial and Commercial Business Development and future potential for Torbay. The Economic Strategic Roadmap will address economic development /diversification and sustainability of the Town by addressing the dual pillars of Business Development and Town Development. Work will include consolidating the findings of a number of reports which have been completed since 2008; undertaking an engagement process to gain current input and consensus building; developing a set of goals, objectives for economic diversification and development; and preparing an implementation plan to achieve Torbay's potential for future business development and community vitality.

The objective of the Roadmap is to play a key role in community development, revitalization and economic development in Torbay and to create sustainable roadmap for continued growth that complements the Towns current progressive and proactive strategic strides.

The Town has identified multiple tasks for the Roadmap Project towards achieving its objectives:

- Engage with stakeholders through a series of workshops and other initiatives to gain input and consensus building regarding future development of the Town;
- Expand the vision and goals outlined in the various prior reports to develop one comprehensive document;
- Build on the work completed through other adopted Town plans, by-laws, policies and provide recommendations on making adjustments that favor increased economic growth, and, to support the desire to establish welcoming and attractive public spaces/parks in order to help different interest groups create stronger ties within the community and increase Torbay's Tourism potential;
- Provide direction for future development and redevelopment of the Town Centre in order to facilitate economic success and to accommodate the current and forecasted growth of the Town;
- Provide strategies that encourage mixed-use development and the commercial use of adjacent public spaces in order to increase the vitality, safety and attractiveness of Torbay, in particular Torbay Town Centre;
- Provide direction for future development of a possible business industrial park within the Town Boundaries and recommendations for a Business Retention and Expansion Model;
- Assess investment readiness of the Town and make recommendations for improvements;
- Undertake a SWOT analysis for the Town and identify innovative strategies and actions to take advantage of strengths and opportunities as well as to mitigate any weaknesses and/or threats.
- Examine strategies to increase tourism opportunities being attracted to and retained in the Town taking into account work already completed in the Northeast Avalon Destination Development Plan, which includes an inventory and gap analysis of tourism related business and infrastructure

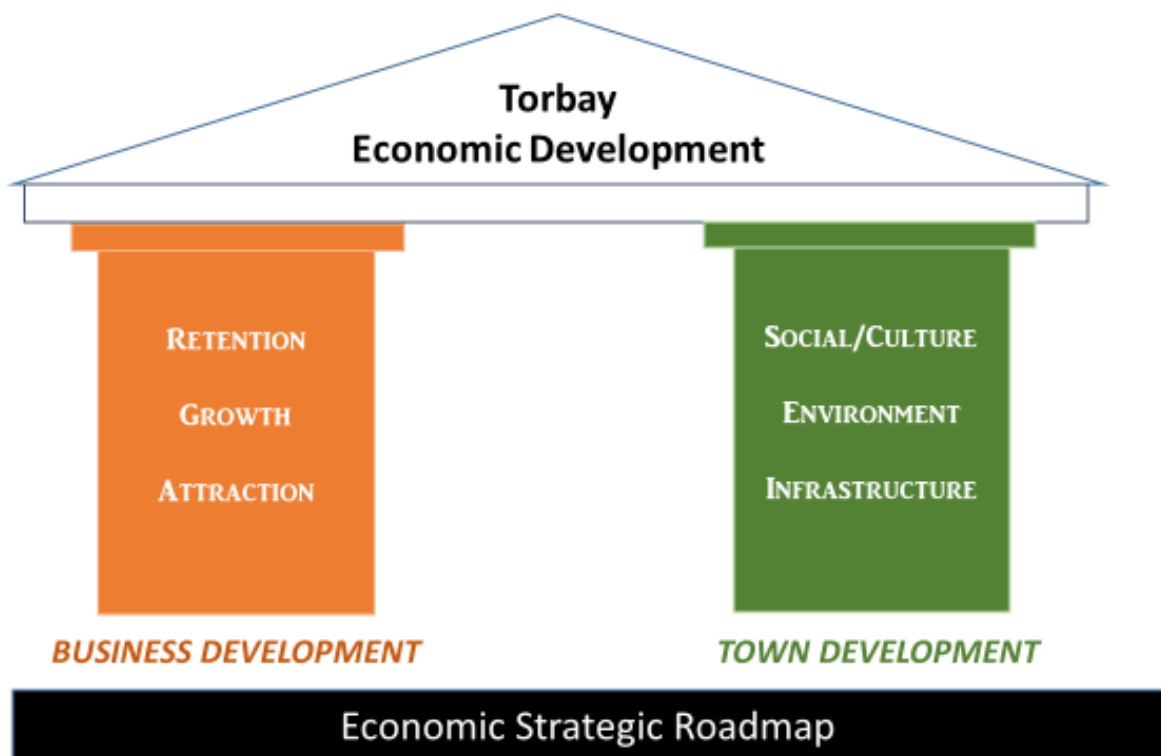
in the region. Also consider the development of the Torbay History House & Museum to these opportunities;

- Conduct a technical assessment of the industrial/commercial lands including an assessment of the region's land supply and demand drivers;
- Identify sources of potential funding or grant sources to support the Plan's implementation;
- Promote a high-quality sense of place through all recommendations including potential design features, beautification techniques, and built proposals to help enhance the overall character of the Town of Torbay.

Tract Consulting Inc. with the Centre for Innovative and Entrepreneurial Leadership (CIEL) has been engaged to assist the Town with preparation of the Roadmap.

2.2. PROJECT APPROACH

Based upon the Strategic Plan for the Town and the work highlighted in the RFP, Tract is undertaking preparation of the Economic Strategic Roadmap for economic development/diversification and sustainability of the Town of Torbay by addressing the dual pillars of Business Development and Town Development.



- **Business Development**

Business Development is the primary pillar. It includes all activities to assist growth and retain current businesses, attract new business and support entrepreneurship. In the simplest terms, a municipality's economic development objectives are to increase its tax base, create jobs, and stimulate the local economy by encouraging new business activities or expansion of existing business activities. These business activities result in an infusion of construction capital, the inflow of money from the purchase of goods and services, increased payroll dollars circulating in the local economy, and an expanded tax and fee base for the community. The added diversity of the business mix also makes the community more attractive to residential and economic development prospects.

Tourism Sector Development has been highlighted by the Town as an area of growth and tourism product development will be addressed as a subset of the general initiatives to support business and with town development particularly related to infrastructure development and attractions.

- **Town Development**

Town Development is an important pillar for overall economic development in any municipality. It is particularly important for Torbay which being located adjacent to St. John's provides the opportunity to build its population base both by retaining residents and by attracting new residents many of which would choose to live in Torbay while working elsewhere. The key to this strategy for growth is ensuring that Torbay is a place where people wish to live, work and play. This is done by preserving and enhancing the social/cultural character of the Town, developing in an environmentally sustainable manner and by ensuring that that Town infrastructure (built environment) meets business and resident needs.

2.3. PROJECT METHODOLOGY

Tract will undertake the Project in three phases:

Phase 1: Research and Consultation will include a comprehensive review of document and data relevant to the Project, completion of research and analysis on specific areas of activity and/or related to specific opportunities as identified by the Town and formal stakeholder consultations (surveys and business/community leader Roundtable) complemented by a selected number of personal interviews to garner input from key stakeholders in the Town including business owners, tourism enterprises, community groups, and residents. The Phase 1 work will conclude with preparation of a Gap Analysis related to the major pillars which support economic development.

Phase 2: Development Framework will address where the Town would like to be, that is, a vision and objectives specific to economic development. The outcome from this task will be the statement of a preliminary vision, objectives and core strategies for the Town related to economic development and sustainability; a compendium of potential initiatives related to economic development; and, will conclude with the Town making decisions, with Tract assistance, regarding prioritization of potential initiatives for detailed planning.

Phase 3: Phased Work Plan and Funding will include preparation of multi-year phased workplan of the short term and longer-term initiatives and recommendations which have been developed to achieve the vision and goals along with recommendations regarding potential funding sources.

The Figure below outlines the three-phased project methodology which the Team will follow to develop a comprehensive Economic Strategic Roadmap for the Town of Torbay.

Three-Phase Project Work Plan



The outcomes and findings from Phases 1-3 will be consolidated into the Final Report.

3. DOCUMENT REVIEW

During Phase 1, Tract undertook a comprehensive review of documents and data which had been compiled by the Town or by various consultants on behalf of the Town. Following is a listing of the thirty-six documents which were reviewed. These documents have been compiled in a database and key findings is referenced in this report.

- 1) Planning Strategic Plan
 - a) Torbay Economic Development Strategic Plan 2013 (Millier Dickinson Blais)
 - b) 2014 -17 Strategic Plan (LW Consulting)
 - c) Torbay Strategic Plan 2018 - 2021 (LW Consulting)
 - d) 2020 Strategic Plan Update (Town Website)
- 2) Town Budget
 - a) Budget 2020 (Town Website)
 - b) Budget Mailout (Town Website)
 - c) 2020 Torbay Tax and Fee Structure (Town Website)
- 3) Municipal Plan/Regulations/Policies
 - a) Town of Torbay Municipal Plan & Development Regulations 2015 – 2025 (Plan Tech)
 - Zone Map
 - b) Habitat Conservation Plan for the Town of Torbay (2010) (Expanded 2015, NL Wildlife)
 - c) Engineering Design Guidelines for Subdivisions (Revised July 2016)
- 4) Town Infrastructure
 - a) Best Available Technologies (BAT) Wastewater Study (Progressive 2015)
 - b) Alternative Water Supply Study (Progressive 2016)
 - c) 2015 Pedestrian Safety Review (Harbourside 2015)
 - d) Roads Assessment Report (Progressive 2016)
- 5) Town Culture, Heritage and Recreation
 - a) Town of Torbay Recreation Master Plan (Aug 2009) (Tract)
 - b) Torbay Beautification Plan (2010 Tract)
 - c) Torbay Open Space Management Strategy (2010 Tract)
 - d) UT Corner Pond Park Design (Arch49 2016)
 - e) Torbay Heritage Plan 2008 (2009, Tract)
 - f) Torbay History House and Museum Planning Report (2017) Norris, Lethbridge & Fresh Fruit
 - g) Torbay Museum Business Plan (2018, Tightlines)
- 6) Tourism
 - a) Torbay Comprehensive Tourism Plan (Apr 2010) (Tract)
- 7) Marketing and Promotion
 - a) Town of Torbay Community Profile 2018
 - b) Signage and Wayfinding (2009 Tract)

- 8) Town Centre
 - a) Torbay Town Centre Plan 2014 (CBCL)
 - b) Torbay Town Centre Architectural Guidelines 2014 (Woodford Sheppard Arch./CBCL)
 - c) Torbay Town Centre Lands Analysis 2018 (Altus)
- 9) Business (General)
 - a) Torbay Business Advantage (Town Website)
 - b) Torbay Business Sector Opportunities (Town Website)
 - c) Torbay Business Listing (July 2020)
- 10) Business Park
 - a) Town of Torbay Business Park Feasibility Study: Preliminary Feasibility Report (Jan 2011) (CBCL)
 - b) Town of Torbay Groundwater Servicing for Commercial Development (Feb 2013) (CBCL)
 - c) Groundwater Quality Report, Proposed Business Park (CBCL 2015)
 - d) Light Industrial Park (Student Report 2020)
- 11) Demographics and Other Data
 - a) CMA Torbay Proof - Survey (2016)
 - b) Working Paper: Torbay Demography and Social Economic Characteristics (2020) RAnLab

4. DEMOGRAPHIC, ECONOMIC AND LABOUR FORCE PROFILE AND PROJECTIONS

4.1. COMMUNITY ACCOUNTS

Community Accounts is an innovative information system which has been developed by the Government of Newfoundland and Labrador to provide users at all levels with a reliable source of community, regional, and provincial data. A public-wide, online data retrieval system for locating, sharing and exchanging information related to the province and its people, the Community Accounts provides users with a single comprehensive source of community, regional, and provincial data that would normally not be readily available, too costly to obtain, or too time consuming to retrieve and compile.

This innovative system allows users to custom generate a limitless number of tables and illustrative graphics on key social and economic indicators organized by geography and data topic within a system of distinct accounts, while the Well-Being account allows users to compile indicators from each of the above domains to develop a better understanding of the factors that determine the status and progress of their communities and regions.

Under this structure, information can be retrieved according to 400 communities, 80 census consolidated subdivisions (local areas), 20 economic development zones, and the province. Information can also be retrieved at the level of Rural Secretariat Regions, Health Authorities, School Districts, and Human Resources Development Canada Regions.

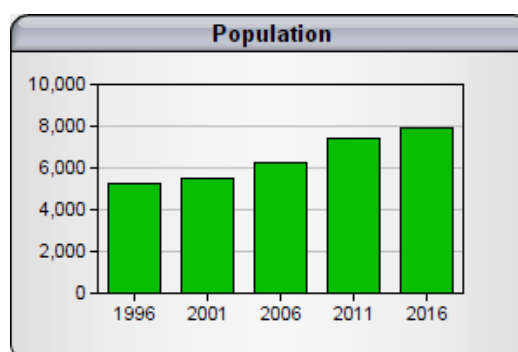
The Torbay Profile has been used to develop this summary and it can be found at:

https://nl.communityaccounts.ca/profiles.asp?_vb7En4WVgaauzXVqXQ_#

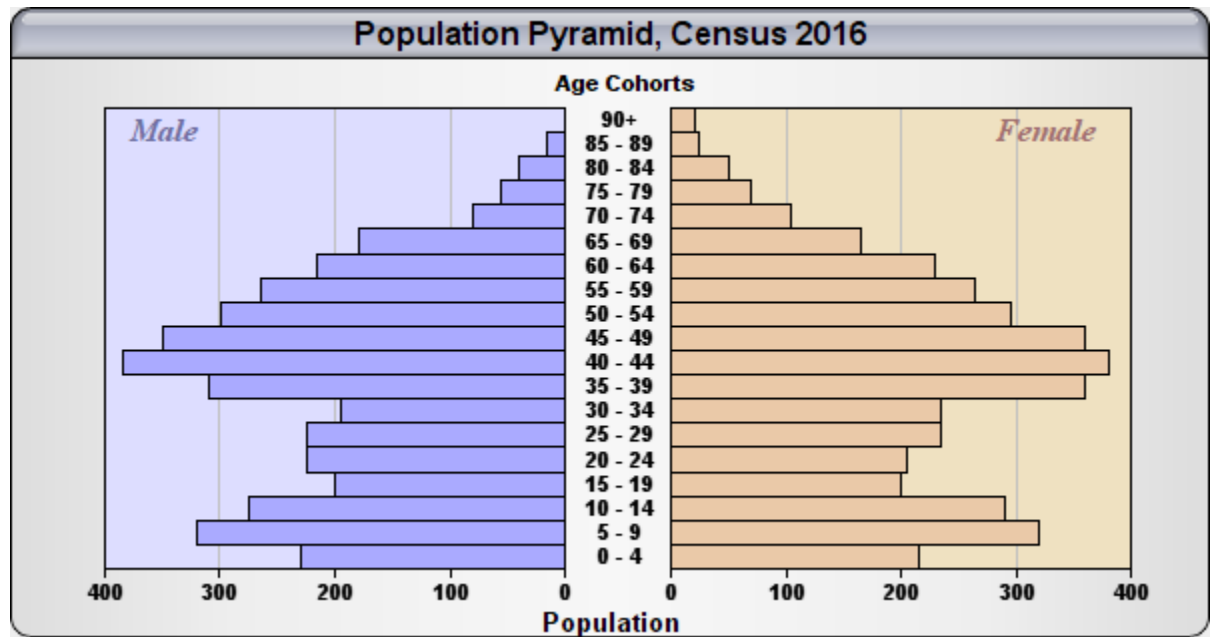
4.1.1. Population

The 2016 Census population for Torbay was 7,895. This represents an increase of 6.8% since 2011 (7,395 in 2016, up from 7,395). Over the same period, the entire province experienced a population increase of 1.0% since 2011 (519,715 in 2016, up from 514,535).

The population growth rate for Torbay was down from the previous two census periods. It was 14.7% from 2001-2006 and 17.4% between 2006 and 2011.



The median age in Torbay was 39 in 2016. The 2016 median age in Newfoundland and Labrador was 46.



4.1.2. Migration

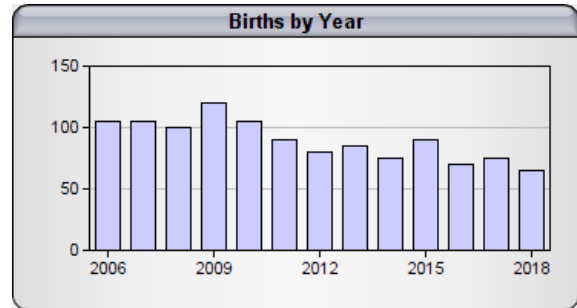
Net migration using the residual method is calculated by subtracting the current population from the population in the previous year and then removing the affect that births and deaths has on the population. By doing so, the remainder/residual is the number of people who migrated into or out of the area.

The Residual Net Migration for Torbay was -0.33% (-25 individuals) in 2015. For the Province, it was 0.63% (3,235 individuals) in 2015.

4.1.3. Births

In 2018 there were 65 births in Torbay. This is a 13.3% decrease since 2017 when there were 75 births.

The total birth rate for 2018 for Torbay was 8.2. The total birth rate is the ratio of live births to the population expressed per 1,000. The total birth rate for the province in 2018 was 7.7



4.1.4. Deaths

In 2018 there were 45 deaths in Torbay. This is a 12.5% increase since 2017 when there were 40 deaths.

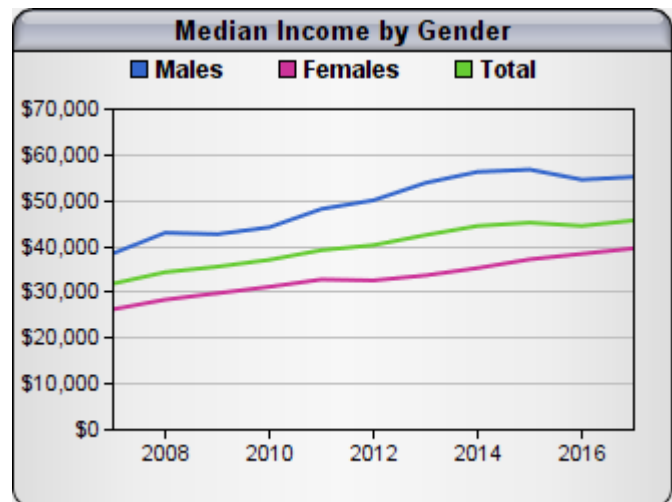
The median age of death in Torbay in 2004-2017 was 72. On a community level the median age of death can change greatly from year to year. The median age of death in Newfoundland and Labrador in 2004-2017 was 78.



4.1.5. Income

The 2017 gross income for every man, woman, and child (gross personal income per capita) in Torbay was \$44,300. For the province, gross personal income per capita was \$37,100.

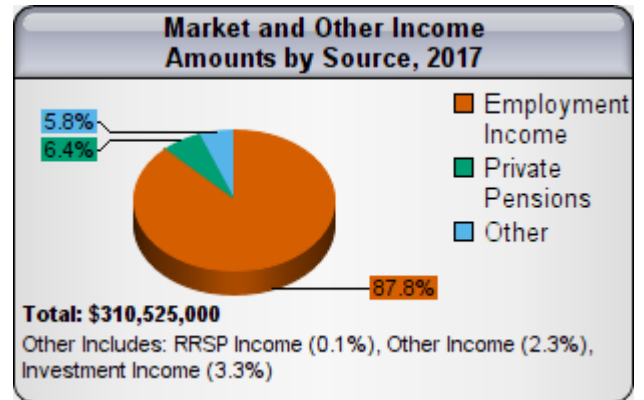
- Half of the males in Torbay received more than \$55,000 in income during 2017, while half of females received more than \$39,400. Half of the males in Newfoundland and Labrador received more than \$40,500 in income during 2017, while half of females received more than \$27,000. The national values were \$42,100 for males and \$30,500 for females.
- Half of the couple families in Torbay had incomes of more than \$126,100 in 2017. Half of the couple families in the province had incomes of more than \$89,200. The national value was \$93,000.
- Half of the lone parent families in Torbay had incomes of more than \$51,700 in 2017. Half of the lone parent families in the province had incomes of more than \$41,700. The national value was \$46,100.
- The average couple family income in Torbay was \$141,700 in 2017. The average couple family income in the province was \$108,400. The national value was \$116,200.



4.1.6. Market Income and Self Reliance Ratio

In 2017, the sources of market income for persons in Torbay were:

- Employment Income (4,670 persons reporting \$58,400 average income)
- Investment Income (1,090 persons reporting \$9,500 average income)
- RRSP Income (65 and older) (60 persons reporting \$7,300 average income)
- Private Pension (830 persons reporting \$24,100 average income)
- Other Income (970 persons reporting \$7,300 average income)

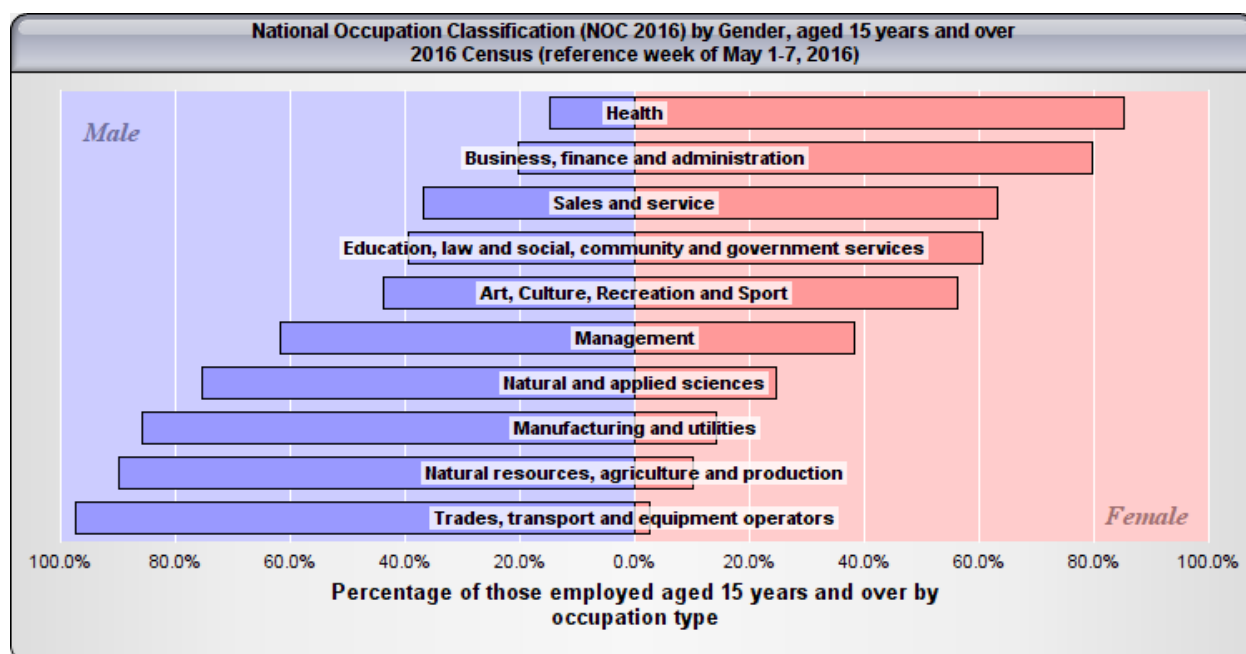


The 2017 self-reliance ratio for Torbay was 89.8%. This is a measure of the community's dependency on government transfers such as: Canada Pension, Old Age Security, Employment Insurance, Income Support Assistance, etc. A higher self-reliance ratio indicates a lower dependency. The self-reliance ratio in the province was 79.9%.

4.1.7. Labour Force

In Torbay, during the reference week of the 2016 Census (May 1-7, 2016), the employment rate for those aged 15 years and older was 64.7% (49.5% for NL). During the same period, the unemployment rate for Torbay was 7.9% (15.6% for NL). There were 4,345 (256,855 for NL) individuals participating in the labour force.

Of those who were employed during the reference week of May 1-7, 2016 in Torbay: 3.75% worked at home; 0.38% worked outside Canada; 9.64% had no fixed workplace address, and 86.23% worked at a usual place. The median commuting duration for those in Torbay was 20.2 minutes.



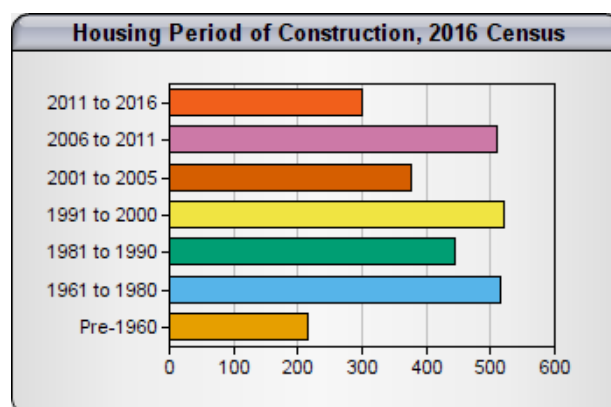
4.1.8. Dwellings

According to the 2016 Census, there were 2,880 dwellings in Torbay, compared to 2,590 in 2011. Dwellings do not include private farm or reserve dwellings. Of these, 2,325 were detached houses and 40 were apartments. Single family households accounted for 2,280 dwellings, while there were 50 multiple family households and 545 non-family households.

As reported by the 2016 Census, 84.5% of homes in Torbay were owned versus rented compared to 76.8% for the province and 67.8% for Canada.

People living in Torbay reported in 2016 that:

- 215 dwellings were constructed before 1960.
- 515 dwellings were constructed between 1961 and 1980.
- 445 dwellings were constructed between 1981 and 1990.
- 520 dwellings were constructed between 1991 and 2000.
- 375 dwellings were constructed between 2001 and 2005.
- 510 dwellings were constructed between 2006 and 2011.



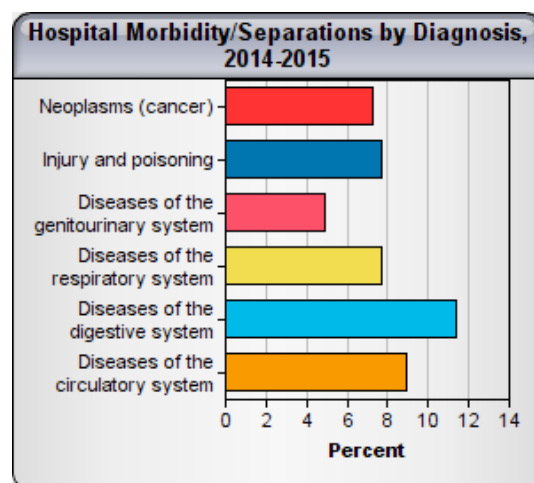
- 300 dwellings were constructed between 2011 and 2016.

The average assessed residential values for 2016 based on market values as of January 2014 from the Municipal Assessment Agency for the Municipality of Torbay were \$339,900

4.1.9. Health

A major indicator of well-being is how a person rates their own health status. In 2015-2016, 64.8% (+/- 18.7%) of individuals age 12 and over in Torbay rated their health status as excellent or very good. For the province, 62.0% (+/- 1.7%) of individuals age 12 and over rated their health status as excellent or very good.

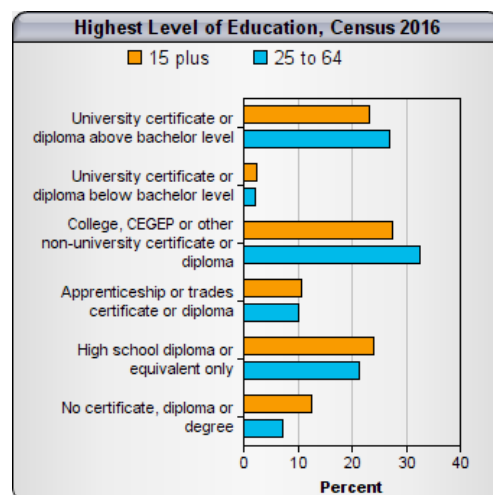
The highest percentage (11.4%) of hospital morbidity/separations during the period 2014-2015 for Torbay was due to diseases of the digestive system. At the provincial level, diseases of the circulatory system accounted for the highest percentage at 12.4%. The average days in hospital for this most common diagnosis was 5.6 days. The average days in hospital across the province for this diagnosis was 6.5 days. The median age of people with this diagnosis in Torbay was 53 years, while the median age for this diagnosis in the province was 59.



4.1.10. Education

The 2016 Census reported that 12.5% of people 15 years of age and older in Torbay do not have a high school diploma compared to 23.4% of people in the entire province.

In Torbay about 87.5% of people aged 15 and over had at least a High School diploma in 2016 compared to 76.6% in the province as a whole. In Torbay about 23.2% of those people aged 15 and over had a Bachelor's Degree or higher in 2016 compared to 14.8% in the province as a whole.



4.2. WORKING PAPER ON TORBAY DEMOGRAPHY AND SOCIAL ECONOMIC CHARACTERISTICS (HARRIS CENTRE RANLAB)

Torbay is included in the “Northeast Avalon Project” being undertaken by the Harris Centre for Regional Analytics at Memorial University (RAnLab). It is a research project to understand the implications of changing demographics and associated trends on municipal services, economic development and other stakeholders in the Region. Major features of the work, in addition to data collection and analysis, is the development of a population projection model and a supply chain model.

The work by RAnLab is a great resource for Torbay and other municipalities in the Region for economic and town development planning. The Working Paper on Torbay Demography and Social Economic Characteristics prepared by RAnLab in 2020. It contains a discussion on Torbay’s demography and social economic characteristics within the context of an ageing population.

Using the population characteristics and projections the study examined the following:

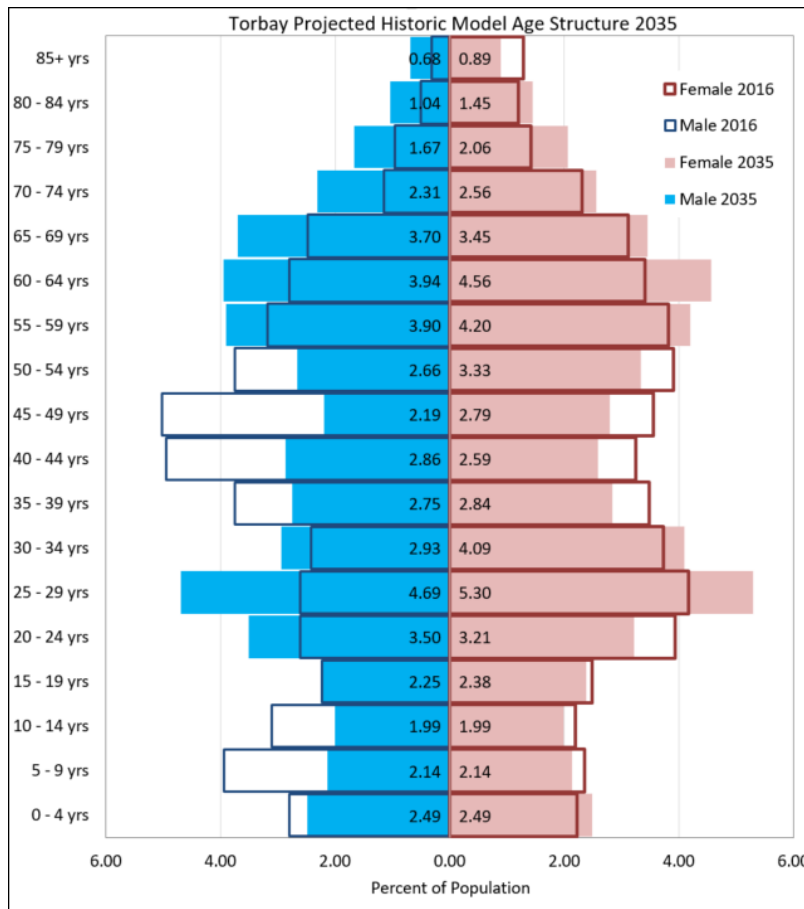
- demography (age structure, migration patterns and projections)
- regional connections (commuting and regional trade flows),
- the economy
- comparative advantage (local demand versus exports)
- occupation trends and the ageing factor
- income sources
- housing types and demands
- consumer spending

In this section, Tract will present selected data, analysis and findings from the report which we feel are particularly important to Torbay’s decision-making related to economic and town development going forward. The full report should be consulted for detailed analysis and context.

4.2.1. Demographics and Population Projection

- The 2016 age structure for Torbay is that of an ageing population with a high number of youth age cohorts because it is attractive to people settling to start families. There is a higher concentration in the 35-39 to the 55-59 age cohorts with 11.5% more than expected and is typical of an ageing workforce.
- The results of the 3 different population models (Historical, No Migration and Targeted Migration), using their assumptions about births, deaths, and migration, estimate that by 2035 the population of Torbay could vary from a low of 7,624 for the no migration model (represents a decrease in population) to a high of 9,224 for the historical model. The targeted migration model estimates the population to increase to 7,945.
- For the population to grow in Torbay as well as the CMA overall regional in-migration is the only option for growth.

- From 2016 to 2035 the historic model estimates that youth aged 0-4 to 15-19 will decrease by 357.
- For age cohort 65+ both the historic and targeted migration model produced similar estimates where the historic model estimated an increase from 850 in 2016 to 1,828 in 2035 or a 115% increase while the target model estimated the 65+ population to be 1,812 or a 113% increase.



The Report conclusion regarding population projection for Torbay is: **“One common theme throughout the population model outcomes is that regardless of the models used to predict, the population of Torbay will age and deaths will increase because of the number of older cohorts in the current population. The outcome from the demographic analysis where the results from the historic and targeted migration models are similar whereby the estimated population of seniors aged 65+ will increase by 115% and 113% respectively. These results would suggest that regardless of the uncertainty that it is associated with the younger cohorts the ageing factor in Torbay population between 2016 and 2035 must be monitored in terms of demands for services as well as consumers.”**

4.2.2. Dependency Ratio

Statistics Canada defines the demographic dependency ratio as a measure of the size of the dependent population in relation to the working age population who theoretically provide social and economic support. The dependent age groups are: [i] youth 0 to 19 years and [ii] retirees 65+ years. The ratio is expressed as the “number of youth or retirees” for every 100 workers aged 20 to 64 years. Changes in the ratios highlight changes in the age composition of the population. In cases where the senior ratio is greater than the youth ratio the population is ageing.

- In 2016 the total dependency ratio for Torbay is 57 (youth + seniors) indicates that for every 100 workers there are 57 dependents (Table 3). The value for Canada in 2016 was 48.24. When this value exceeds 60+ it is considered high and there will be increase demand as well pressure on resources to provide services for the dependents.
- In 2016 there were more youth dependents (40) than seniors (17). While this is a sizeable difference, it depends on youth retention and the margin needs to be higher for a more stable workforce in the future.

Population Model	Est. Population	Average Age	Births	Deaths	Youth (<20) Dependency Ratio	Seniors (65+) Dependency Ratio	Total Dependency Ratio
2016 Census Year (Observed)	7,875	37.6	74	49	40	17	57
Historic Cycles (2035)	9,224	42.4	106	98	29	32	60
No Migration (2035)	7,624	45.3	78	103	25	39	64
Targeted Migration (2035)	7,945	44.1	82	97	29	38	68

- By 2035 the historic model estimates that the total dependency value is 60 or 60 dependents for every 100 workers. In this scenario seniors with a value of 32 is slightly higher than youth with a score of 29. In this case the system has increasing pressure because of nearly equal demands for both cohorts. For the targeted model outcomes seniors with a value of 38 is still higher than youth with a value of 29 for a total score of 68 which is still considered high.

The Report conclusion regarding dependency ratio for Torbay is: **“Both population models estimate that the dependency ratio will be 60+ and this is considered high and is symptomatic of an ageing population and given that in both scenarios there is less difference between youth and senior dependency ratios than present indicates increasing pressure on resources to provide services for both age groups.”**

4.2.3. Regional Economic Connectivity

Connectivity between places refers to the degree to which places are connected in terms of people (e.g. commuters), goods/commodities and services. A municipality's role in a regional economy is generally revealed by examining worker commuting patterns as well as supply chain flows or value transactions/linkages of commodity flows amongst industries. This includes goods and services associated with retail and public sector industries.

- Of the estimated 3,305 commuters originating in Torbay 7.26% of the workers commute to work within the boundaries of the town, 81.39% go to St. John's, 7.26% go to Mount Pearl, 3.03% have an external destination and 1.06% go to Paradise.
- Due to high (out) commuting and low in commuting, Torbay has a daytime population of 5,150 and this represents a decrease of 34.6%. These declines represent a significant daily reduction in population and may impact some businesses. However, the return commute offers intervening opportunities and generally businesses are located to take advantage of these commuters.
- In the case of Torbay 65.16% of supply chain value transactions occur between businesses within the town's boundaries. Value based transactions from Torbay businesses to other businesses in 4 of the other municipalities are less than 1.5% while there is a 20.72% supply chain flow from Torbay to St. John's and a 12.63% flow to places External to the region.
- The supply chain transactions from the other 5 municipalities to businesses in Torbay are all estimated to be less than or equal to 1%.

4.2.4. Torbay Economy

- In Torbay, the top 6 employment industries all are in the private sector: construction (469), food services and drinking places (143), and food and beverage stores (136) top the list.

Industry	Est. Total (Direct + Indirect) Employment	Est. Direct Employment	Est. Indirect Employment	Number of Establishments	% Employment in Small & Medium Enterprises
Construction	469	299	170	93	100.0%
Food services and drinking places	143	127	16	7	100.0%
Food and beverage stores	136	121	16	8	100.0%
Lessors of real estate and financial investment services, funds and other financial vehicles	113	85	28	65	100.0%
Services to buildings and dwellings	108	94	14	12	100.0%
Ambulatory health care services	94	89	5	36	100.0%
Nursing and residential care facilities	69	57	13	5	100.0%
Architectural and structural metals manufacturing	65	35	31	1	100.0%
Elementary and secondary schools plus other educational services	65	47	18	6	100.0%
Architectural, engineering and related services	56	41	15	17	100.0%
Employment services and management, scientific and technical consulting services	47	41	6	18	100.0%
Local, municipal and regional public administration	44	35	10	1	100.0%
Gasoline stations	40	36	4	3	100.0%
Social assistance	39	38	1	14	100.0%
Truck transportation	33	26	7	8	100.0%
Fishing, hunting and trapping	33	28	6	26	100.0%
Personal care services and other personal services	28	24	4	9	100.0%
Amusement, recreation, performing arts, spectator sports and related industries, and heritage institutions	24	22	2	7	100.0%
Machinery, equipment and supplies merchant wholesalers	21	17	4	2	100.0%
Automotive repair and maintenance	17	16	2	5	100.0%
Traveller accommodation	17	16	2	2	100.0%
Health and personal care stores	17	15	3	1	100.0%
Offices of real estate agents and brokers and activities related to real estate	17	12	5	12	100.0%
Lessors of non-financial intangible assets (except copyrighted works)	15	7	8	1	100.0%
Accounting, tax preparation, bookkeeping and payroll services	14	13	1	5	100.0%

- For construction, there are on average 469 employees associated with this sector. However, 299 are directly employed with construction companies while 170 (36.2%) are classed as indirect employment and linked to the spinoffs associated with the construction industries. Out of the top 25 industries this is the highest gross indirect job spinoff and signifies the importance of this sector to the town's economy. For this sector, all 100% are employed in SME's with less than 200 employees.
- In Torbay all of the enterprises in the top industries are SMEs. SMEs are somewhat volatile because they tend to be more sensitive to downturns in the economy.

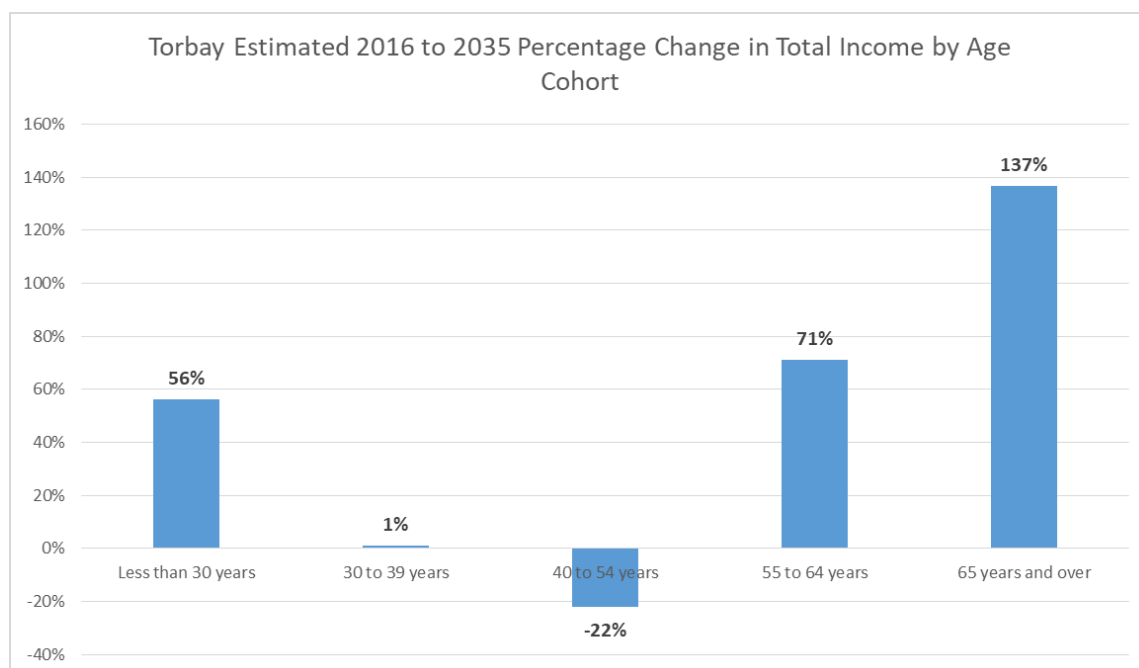
4.2.5. Housing Types and Demands

- In 2016 62.9% of the households in Torbay contained 2 persons or less, 18.3% had 3 persons, 12.9% had 4 persons and 5.8% had 5 persons or more.
- Given the fertility and demographic characteristics of the town it is likely that the future dominant household sizes will be 3 persons or less and in 2016 this class of household size accounted for 81.2% of the households.
- Given that it is projected that from 2016 to 2035 the population age 65+ 2016 to 2035 will increase by 115% this raises a question of the suitability of existing housing stock for smaller households and seniors.
- Future housing demands will have to consider the suitability of existing housing stocks to meet the shift in household sizes and whether renovating unsuitable houses is a viable option. This issue of existing stock suitability is evident by the predicted trends for household size where the largest future demand is for 1 to 2-person households.

The Report conclusion regarding housing types and demands for Torbay is: **“If the historic trends continue to 2035 there will be a demand for: 20 dwellings for 1 or 2 persons per year, and 4 dwellings per year for 3 or more person families.”**

4.2.6. Spending

- Using the historic demographic model and incomes by age cohort it is estimated that the total income for Torbay will increase from \$330 million in 2016 to \$403 million by 2035 or a 21.9% increase or on average an additional \$3.8 million per year.
- Given that the 30-39 age cohort spending may increase by 1% and the 65+ cohort may increase by 137% a comparison of these cohorts spending in 2016 provides some insight how spending on select discretionary spending categories may be impacted.
- For the selected discretionary spending categories presented in Figure 26 the 2016 total spending for the 30 to 39 cohort was approximately \$12.3 million while the total spending for the 65+ cohort was \$6.2 million. If 2016 spending for the 30 to 39 cohort was increased by 1% the total spending would sum to \$12.4 or a marginal increase. However, if the 2016 spending for the 65+ cohort increased by 137% the spending would increase from \$6.2 million to \$14.7 million or a net gain of \$8.5 million.



The Report conclusion regarding Income and Spending for Torbay is: **“If the predicted growth in income holds for the 65+ age cohort there will be opportunities for businesses to provide services for this cohort. In addition, an analysis is required to determine the overlap in services/businesses purchased or utilized by younger and older cohorts (e.g. swimming pools). This assessment of existing public services would examine capacity limits of existing facilities versus new services for the older cohorts. Similarity for businesses the response may be one of adding new items/services to their existing enterprises versus starting new ventures to meet demand.”**

5. REVIEW OF PLANS AND ACTIONS

This section reviews the Strategic Plans which have been developed for the Town of Torbay over the past decades, the studies and reports which have informed these planning processes and the outcomes which have been realized.

This review is very important to the Roadmap process because it identifies the range of issues which have been considered to be most important during this period, the aspirations of the Town, the actions which have been taken as well as associated successes and failures. Understanding the past is essential for planning for the future.

5.1. STRATEGIC PLANS

There have been three Strategic Plans developed for the Town of Torbay over the past decade:

1) **2013 Torbay Economic Development Strategic Plan**

This Strategic Planning effort was undertaken by the Toronto firm **Millier Dickinson Blais**, one of the largest economic development specialist consultancies in Canada. The Final Report was presented in December 2013. It is a very comprehensive report with detailed background data and analysis leading to about forty recommendations in six areas activity. The report and its recommendations focus on economic development of the Town and generally does not deal with town development issues.

The 2013 Report does not appear to have been adopted by Council. Recommendations related to a potential Business Park and Town Centre were included in later Strategic Plans. Recommendations related to establishing a stronger economic development culture and approach across a range of Town activities do not appear to have been followed up.

2) **2014 -17 Torbay Strategic Plan**

This Strategic Plan was prepared and facilitated by LW Consulting, a local consulting firm specializing in municipal planning. The Plan was adopted by the Council which was elected in September 2013 and incorporated priorities arising from the election process. The Plan is in a standard strategic plan format without background data and analysis but provides a very clear action plan. Key Strategic Initiatives focus on Town infrastructure/Services including a Municipal Depot, Water Supply, Wastewater Treatment, Community & Wellness Centre, Upper Three Corner Park along with development of the Business Park.

3) **2018 -21 Torbay Strategic Plan**

This Strategic Plan was also prepared and facilitated by LW Consulting. The planning process included a survey of residents and a facilitated session with Council. The Plan was adopted by the Council which was elected in September 2017. The Plan is in similar format to the 2014-17 Plan. Long Term Strategic Initiatives were identified as the Water Supply, Wastewater Treatment and a Commercial Centre (Business/Industrial Park). Strategic Initiatives were the Community & Wellness Centre, Traffic Safety Strategy, History House/Museum and a Ten-Year Infrastructure Plan.

Torbay Economic Development Strategic Plan 2013				
	Proposed Actions	Priority	Status 2020	Notes
A	Building a Strong Foundation Action Plan			
1	Maintain a detailed source of community data	High	Not Done	
2	Achieve the Gold Standard of service delivery	High	No Information	
3	Develop a "one team" Torbay approach	Medium	Ongoing	
4	Leverage investment in GIS mapping to better service investors	Medium	No Information	
5	Continue to collaborate with all Town departments to support high business service standards	High	Implemented	
6	Adoption of the "Beautiful Torbay" branding and marketing plan to explicitly target corporate decision makers and talented professionals	Medium	Implemented	
7	Utilize social networking tools to enhance economic development promotional efforts	Low	Implemented	
8	Invest in local labour force attraction and retention	Low	No Information	
9	A personal welcome	High	Implemented	Implemented for new residents; in - development for new businesses
10	Regional Labour Force Monitoring	Medium	Not Done	
11	Support small businesses and encourage local entrepreneurship	Low	Implemented	
12	Establish partnerships with regional agencies and NGO's to support and enhance program delivery	Medium	Implemented	
13	Actively attend events and seminars throughout the region	Low	Implemented	
B	Business Park Action Plan			
1	Make the Torbay Business Park Shovel Ready	Highest	Not done	Not done but initiative included in 2018 Strategic Plan
2	Work with the Planning Department to streamline development process	Medium	Ongoing	
3	Sow the seeds and pursue a regional investment attraction partnership	High	Ongoing	
4	Develop a profile for the business park and its specific site	High	Not done	
5	Ensure Business Park promotional materials are online and regularly updated.	High	Not done	
6	Production of an investment attraction video	High	Not done	A Tourism Video has been completed
C	Town Centre Action Plan			
1	Complete a feasibility study and investment prospectus	Highest	Completed	Concept completed in 2014 by CBCL; Architectural Guidelines completed (2014); Lands Analysis done 2018
2	(Step 2) Issue a request for proposals	High	Not done	
3	(Step 3) Construct multi-purpose leisure centre	High	Completed	Built in different location than proposed Town Centre site
4	(Step 4) Secure tenants for new public, commercial and retail space	High	Not done	
D	Tourism Action Plan			
1	Implement a master plan for the development of the Town Centre	Highest	Not done	
2	Further develop simple physical assets that promote tourism, while beautifying the Town	High	Implemented	
3	Understand the impact of future initiatives	High	Ongoing	
4	Connect directly with Destination St. John's in partnership	Medium	Implemented	
5	Develop niche promotional materials targeting out-of-province visitors already coming to the province	Low	Not done	
E	Cultural Development and Recreation Action Plan			
1	Support the development of Torbay's cultural economy	High	Not done	
2	Develop an integrated trail system that recognizes traditional trails	Medium	Ongoing	
3	Gain the support of Councils and the public	Medium	Ongoing	
4	Establish a formalized volunteer recruitment program	High	Not done	
5	Increase number and quality of local festivals and events	Low	Not done	
6	Measure return on investment for existing events	Medium	Not done	
7	Development of water-based activities	Medium	Not done	
F	Transitioning From a Bedroom Community Action Plan			
1	Expand the acreage of vacant commercial zoned property	High	No Information	
2	Implementation of a formalized business retention and expansion program	Medium	Not done	
3	Inventory and assess the motivations of Torbay-based business owners who operate outside of Town	Medium	Not done	
4	Leverage Torbay's nearly completed promotional materials	Medium	Implemented	

Torbay Economic Development Strategic Plan 2014 - 17

	Proposed Actions	Priority	Status 2020	Notes
A	MUNICIPAL DEPOT			
	To construct a municipal depot to meet the current and future operational needs of the Town.		Built and Operational	
1	To approve a location for the municipal depot			
2	To acquire and rezone approved site for municipal depot			
3	To finalize plans for the municipal depot in accordance with the approved funding			
4	To call tenders and commence construction of the municipal depot			
B	WATER SUPPLY			
	To acquire an adequate and sustainable potable water supply to meet current and future needs of the Town.		Not Done	
1	Undertake a comprehensive water assessment study to identify potential options for a sustainable water supply	0	Completed	Alternative Water Supply Study (Progressive 2016)
2	Develop a comprehensive plan of viable options to provide a sustainable water supply with the capital and operational cost of such options		No Information	
3	Select the most viable option and identify required funding		No Information	
4	Develop and implement a policy of "net zero" runoff for all new developments		No Information	
C	COMMUNITY AND WELLNESS CENTRE			
	To construct a Multi-Purpose Community and Wellness Centre as the focal point for all community based recreation, cultural and heritage activities to meet its current and growing needs		Built and Operational	
1	To acquire land, finalize plans, and costs for the Multi-Purpose Community and Wellness Centre		Done	
2	To submit funding request for the Multi-Purpose Community and Wellness Centre under the 2014-2017 Multi-year Capital Works Program		Done	
3	To identify human resources and operational costs of the Multi-Purpose Community and Wellness Centre		Done	
4	Upon funding approval call tenders and commence construction of Multi-Purpose Community and Wellness Centre		Done	
D	BUSINESS PARK			
	To develop a Business Park to cater to light industrial and warehousing businesses to address current and future business demands.		Not Done	
1	To complete a groundwater assessment of the proposed Business Park		Completed	CBCL Report 2015
2	To finalize the size and scope of the Business Park		Not done	
3	To complete the feasibility study of the Business Park		Not done	
4	To complete a development plan for the Business Park		Not done	
	To develop a marketing plan for the sale of lots in the Business Park		Not done	
E	UPPER THREE CORNER POND PARK			
	To improve the existing facilities at Upper Three Corner Park and construct a clubhouse to meet the Town's organized sports current and future needs		In Progress	
1	To finalize the site for the construction of the new clubhouse		No Information	
2	To develop plans, within approved funding, for a clubhouse including its future expansion and the preservation of the "popsicle house"		No Information	
3	To engage in consultation with users groups and the general public to finalize a list of other improvements to be undertaken at Upper Three Corner Park		No Information	
4	To develop plans for other agreed upon improvements		No Information	
F	WASTEWATER			
	To construct a new Wastewater Treatment Facility to address wastewater requirements		Not Done	
1	Conduct wastewater testing to determine the contents and volume being discharged into the ocean		No Information	
2	Determine the wastewater treatment required to meet the Federal Government's Wastewater Effluent Regulations and the timeframe required to comply with these regulations		No Information	
3	Call a Request for Proposal to conduct a Wastewater Treatment Study to utilize best available technology for a new Wastewater Treatment		Completed	Wastewater Study (Progressive 2015)
4	Complete plans for an approved option for a Wastewater Treatment Facility to take advantage of any funding that may become available		Not done	
G	OTHER ISSUES			
1	Town Hall: Additional space is required to accommodate existing and future staffing needs.			
2	Municipal Sidewalks: Sidewalks should be installed on a portion of Torbay Road in the vicinity of the school.			
3	Speed Bumps: Additional portable speed bumps are required to address speeding issues.			
4	Enhancements to Picnic Area at Whiteway's Pond: Improvements are required to enhance usage and benefit the area residents.			
5	Future Developments in Pine Ridge and Western Island Pond: A Comprehensive development approach for future developments is required.			
6	Secure Lands for Parks and Open Space: Adequate land for parks and open spaces should be identified and acquired.			
7	Municipal Plan Review: The Plan is out of date and a review is required under the Urban and Rural Planning Act.			
8	Review Business Tax Structure and Investigate Methodologies of Limiting Tax Increases in Reassessment Years: A review of the Business Tax structure is required and in reassessment years a mechanism is required to cap maximum tax increases to property owners at a prescribed rate.			
9	Develop a Communications and Public Engagement Strategy: A robust and modern Communications and Public Engagement Strategy is required to provide meaningful information on activities and provide opportunities for input into the Town's decision making processes.			
10	Capital Development Plan to Address Infrastructure Issues: A Capital Plan is required to address all infrastructure issues in accordance with anticipated capital funding.			
11	Create and Fill Position of Building Inspector(s): The introduction of building inspection services would provide a greater reassurance to new home owners on the quality of their home construction.			
12	Affordable Housing Action Plan: The current cost of home ownership is leaving some current residents and newcomers unable to afford a home in Torbay.			

Torbay Strategic Plan 2018 - 21

	Proposed Actions	Priority	Status 2020	Notes
A - LONG TERM STRATEGIC INITIATIVES				
A1	WATER SUPPLY To acquire an adequate and sustainable potable water supply to meet current and future needs of the Town.		No Solution evident at this time	
	Meet with Regional Water Committee (RWC) to determine availability of water from Regional System to fulfill Torbay's Water requirements.		Determined that no additional capacity on Windsor Lake or Regional Water System exists July 2018	
1	Meet with Regional Water Committee (RWC) to determine availability of water from Regional System to fulfill Torbay's Water requirements.			
2	Council to review decision of Regional Water Committee re-providing water to Torbay			
3	Conduct review of water capacity requirements of the Town, identify gaps, and potential methods to address such issues		Flow meter installed on North Pond. Capital application for Zone metering and leak detection funds approved July 2019	
	Revisit other options to fulfill the Town's water needs		Met Consultant to discuss North Pond and South Pond	
5	Council to review and evaluate results of potential viable options to fulfill water needs for Town and select most cost effective and efficient method to address water requirements		Exploration Study of Great Pond as water supply commences Jan 2020	
6	Council to make a final decision on most effective and cost-efficient method to address water needs of Town to meet current and future needs			
7	Meet with MP and other government officials to update them on selected option to meet Town's water needs and investigate potential funding options		Meetings held with MHA and MP	
A2	WASTEWATER To determine the most viable option to meet Wastewater Treatment obligations in order to be ready to submit a funding application when funding becomes available for such projects.		Optimum Technology Solution not yet determined	
	Undertake a comprehensive water assessment study to identify potential options for a sustainable water supply		BAT Study Completed (2015) and reviewed Sept 2019	
1	Develop a comprehensive plan of viable options to provide a sustainable water supply with the capital and operational cost of such options			
2	Select the most viable option and identify required funding			
3	Develop and implement a policy of "net zero" runoff for all new developments			
4				
A3	COMMERCIAL CENTRE (Business/Industrial Park) To evaluate the feasibility of a Commercial Center (Business/ Industrial Park) within the Town of Torbay to support its growing population, attract new businesses and increase its commercial tax base		Feasibility not yet determined	
	Conduct an Environmental Scan on the future potential of the commercial and industrial needs of the Town. Pending outcome, proceed to determine feasibility.		Included in Economic Strategic Roadmap Project	
1	Evaluation of outcome of Feasibility Study and preparation of recommendations for Council's consideration			
2	Draft plan for Business Park, including method of construction (public or private) and the identification of potential sources of funding			
3	Develop marketing strategy for Business Park			
4				
B - STRATEGIC INITIATIVES (Short Term?)				
B1	COMMUNITY AND WELLNESS CENTRE To renovate and expand the existing Kinsmen's facility to fulfill the growing needs of community groups and to continue to grow community spirit/togetherness.		Completed and opened	
	Award contract to Marco Group for construction of wellness/community centre.		Completed	
1	Develop Sustainability Plan for wellness/community centre including projected revenue, operational cost, staffing model, etc.		Completed	
2	Develop and implement a Capital Funding Campaign for wellness/community centre		Scheduled to conclude June 2020	
3	Grand Opening		Completed Sept 2019	
4				
B2	TRAFFIC SAFETY STRATEGY To develop a Traffic Safety Strategy, including a Transit Plan, to address the many safety issues for pedestrian and vehicular traffic throughout the Town.		Completed	
	Review results of Harbour Side Traffic Study and prepare report on recommended outcomes including capital and operational costs, and implementation schedule		Completed	
1	Develop report on potential revenue sources for installation of sidewalks and other traffic mitigation methods		Scheduled to conclude June 2020	
2				
B3	HISTORY HOUSE/MUSEUM To complete construction of the history house/museum to meet the Town's cultural and historic needs, to build community pride, and increase tourist potential by marketing the many features of the Town		In Progress	
	Develop plans for renovation, restoration, and interpretation for history house/museum		Completed	
1	Develop Funding Strategy for capital funding of history house/museum		?	
2	Develop Sustainability Plan for history house/museum		Completed	
3	Develop proposal for Project Manager for history house/museum		Completed	
4	Develop job description for manager of history house/museum and develop recruitment strategy for this position		Completed	
5	Develop strategy to create and fill a Board of Directors for history house/museum including a Terms of Reference for Board		Completed	
6	Develop Marketing Strategy for history house/museum		Due for Completion Dec 2020	
7				
B4	TEN-YEAR INFRASTRUCTURE PLAN To develop a comprehensive Ten-Year Infrastructure Plan covering all existing Town assets and their annual operational cost, plus any proposed Council prioritized new assets together with their estimated capital and annual operational cost.		No Substantive Progress	
	Develop Asset Management Plan			
1	Conduct review of Asset Management Plan when completed and develop plan to implement recommended outcomes			
2	Develop Ten-Year Infrastructure Plan, complete with annual operational cost for existing assets, capital replacement timeframes and costs, and prioritized listing of potential acquisition and development of new assets			
3	To develop plans for other agreed upon improvements			
4				

5.1.1. Town Vision

The Town's Vision Statement has evolved over the past decade:

2010 - "Torbay strives to be a generous, welcoming, and proud community which values its rich past and looks eagerly to the future for new opportunities and an improved quality of life for residents of all ages. Torbay is committed to being a leader and strong regional partner and wishes to maintain its position as an alternative to urbanization with a healthy blend of new urban development in an historic rural setting."

2014 - "A beautifully planned, well maintained modern rural community, in harmony with residents' needs"

2018 - "A well planned, inclusive community serving the needs of all residents and a desired place for all age groups to enjoy life."

5.1.2. Town Mandate

The Town's Mandate Statement was changed from the 2014 to the 2018 Strategic Plans:

2014 - "To provide a variety of quality municipal programs and services aimed at enhancing residents' lifestyle and a successful business community"

2018 - "To serve the needs of all citizens in a respectful and responsible manner, while providing excellence in our service offerings and programming."

5.1.3. Town Mission

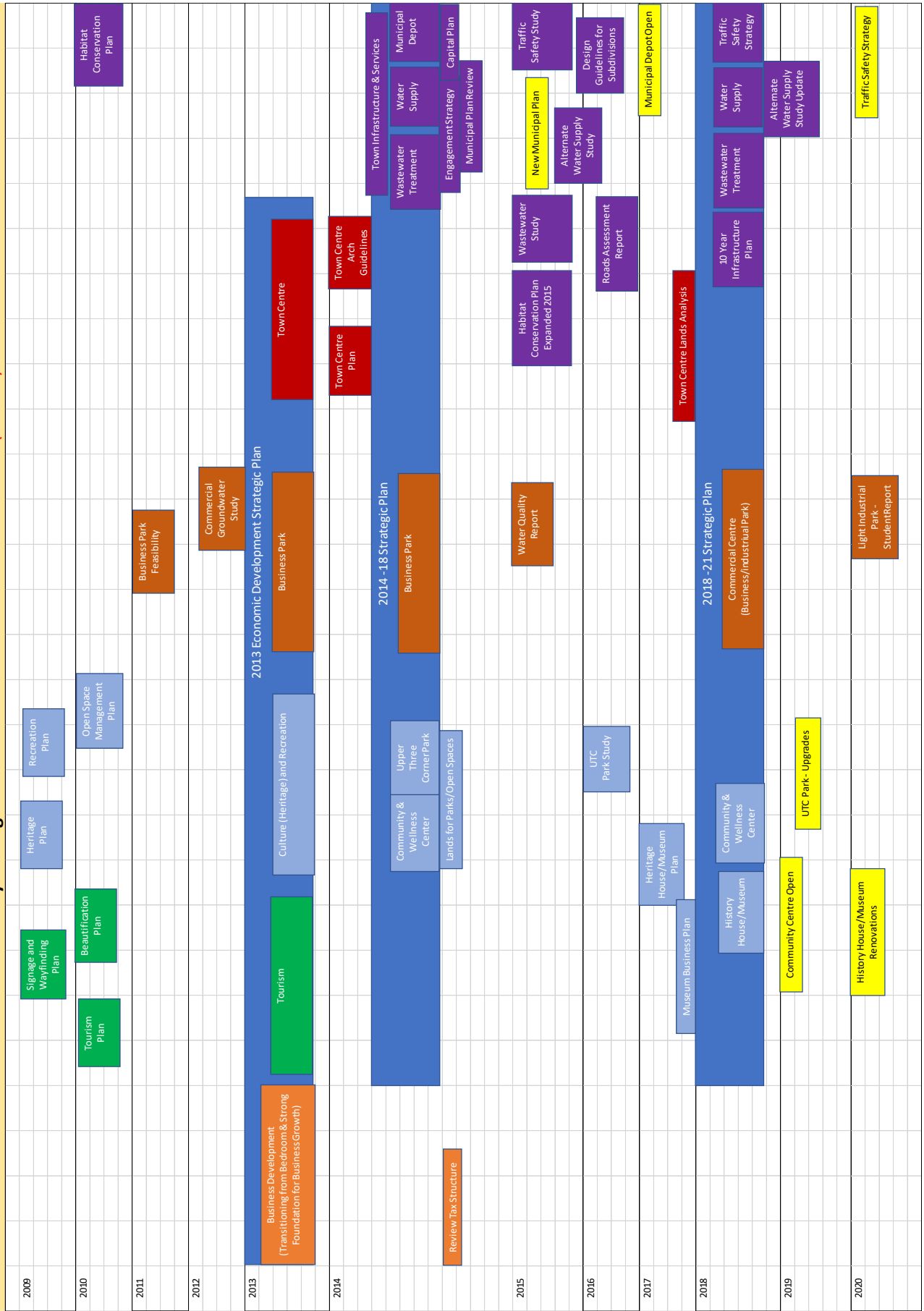
The Town's Mission Statement has been consistent since 2014:

"Leading the way as a family-oriented and business friendly community that is well-run, well- maintained, and well-respected".

5.2. STRATEGIC INITIATIVES AND ACTIONS

The following graphic is a visual representation of the major Initiatives arising from the Strategic Plans, the studies and reports associated with those initiatives and milestones where actions have been concluded.

Torbay Strategic Plans - Timeline of Initiatives and Actions (Rev Oct 11)



Review of the graphic along with notes on Strategic Plans presented earlier provide the basis for observations regarding Town focus and priorities over the past decade including:

A. Business Development

- Business development recommendations directed towards transitioning Torbay from a “bedroom community” and “building a strong foundation for business growth” were a major element of the 2013 Economic Development Strategic Plan.
- While some of the recommendations were implemented by the Town, there does not appear to be any particular priority given to business development.
- A Tax Review was identified in the 2014 Plan with a specific reference to business tax and there was a review of Tax Structure in 2015. (Business Tax will be addressed separately)

B. Tourism

- The Town’s Tourism Plan along with the associated Signage and Wayfinding and Beautification Plans were all done in 2009/10 and there does not appear to have been a formal update of these plans.
- Recommendations from these plans were included in the 2013 Plan but it was not part of subsequent plans other than in reference to the History House/Museum development.

C. Culture (Heritage) and Recreation

- The Town’s Recreation Plan, Open Space Management Plan and Heritage Plan were all done in 2009/10 and there does not appear to have been a formal update of these plans.
- Culture (Heritage) and Recreation was part of all three Strategic Plans and the major initiatives have all been actioned: Community Centre opened, UTC Park upgraded and History House/Museum being renovated.

D. Business Park

- The initial feasibility study for the Business Park was completed in 2011 and it has been part of all three Plans.
- The Business Park development at the identified site adjacent to the Airport has been stymied by contamination identified in the groundwater at the site.
- The 2018 Plan identified a need for a new feasibility study indicating openness to look at alternate options for development.

E. Town Centre

- The Town Centre concept was originally identified in the 2009 Heritage Plan and was incorporated into the 2013 Plan.
- Consultants were engaged to complete a Plan and Architectural Guidelines for the Town Centre in 2014 – Site located adjacent to current Town Office.
- The Town Centre was not included in either the 2014 or 2018 Plans other than in the context of the Community Wellness Centre which ultimately was constructed elsewhere.
- A Lands Analysis (Valuation) Report was completed in 2017

F. Town Infrastructure and Services

- Town Infrastructure and Services was not addressed in the 2013 Plan but was a major part of the 2014 and 2018 Plans.
- Arising from these Plans: a number of studies were undertaken related to water, wastewater, traffic safety, roads assessment; a new Municipal Depot was built; a new Municipal Plan was adopted; and strategies related to Community Engagement and Traffic Safety along with guidelines for subdivisions were developed.
- Two infrastructure issues, Water Supply and Wastewater Treatment, have emerged as major long-term challenges for the Town.

6. SPECIFIC RESEARCH

As part of the Project, the Consultant Team was requested to research a number of specific issues which the Town had deemed to be of particular importance to development of the economic Strategic Roadmap. Accordingly, a series of Issue Papers have been prepared to provide information and analysis to inform discussions and help generate opportunities for business and town development. The Issue Papers have been provided separately and key findings are summarized below.

6.1.1. Town Plan, Policies and Development Regulations

The purpose of this Issue Paper was to undertake a review the Town of Torbay's Municipal Plan policies and Development Regulations zoning provisions through a lens of identifying opportunities to potentially help achieve: Increased Economic Growth; Enhanced local tourism potential; and, Strengthened community attachment.

New opportunities for the Town are possible through adjustments to the current community planning approach, and through a re-focused and targeted economic development effort.

A. Create a Strong Community Vision

- Absent in the Town's land use planning documents is a clearly articulated and attainable vision statement to identify a community shared future direction of Torbay.
 - A community vision statement that focuses on sustainable development, smart growth and complete community values of environmental preservation and management, balanced economic development that generates local benefits and employment opportunities, and enhancing community character and local quality of life, is reflective of a vision pathway that should be prominent in the Town's Municipal Plan.

B. Enable the Municipal Plan

- For the Municipal Plan to be effective and responsive, Action Strategies to implement the policy statements outlined within the Plan, must be clearly defined.

C. Provide More Certainty to Developers and Investors

- Investment and development interest in a community gains confidence when the Town's requirements, expectations, general approval timeframe and potential costs for land and building development are clearly articulated within the Municipal Plan and Development Regulations.
 - Developers and investors interested in Torbay want clarity, and a degree of certainty where the municipal goalposts are situated with regard to land and building development requirements and costs. The preferred direction is for the Town to provide enhanced clarity in land use language, such as to express the purpose of each land use zone, to provide more precise definitions of permitted and accessory uses, to manage commercial and employment generating uses in a manner that clearly defines both minimum and maximum building site coverage requirements, to create low/medium and high residential density

locations, and to outline a maximum allowable number of residential dwelling units on a per acre basis.

D. Strive to Achieve Higher Utility of Limited Land Supply

- The Town of Torbay has a relatively small land base area, with water servicing constraints, and land development limitations of wetlands, ponds, steep slopes and a rugged coastline. As the community continues to evolve, there will be a need to continue to protect and preserve sensitive lands, and to strive for land development patterns that make more efficient use of the diminishing developable land supply.
 - More economically efficient use of the land base can be realized through a revised land use planning approach that emphasizes greater building site coverage and improvements on commercial and employment generating lands, and creating opportunities for well planned residential densities, and for more varied and affordable housing choices throughout the community.

E. Acknowledge the Challenge of Climate Changes

- Our climate is changing at an unprecedented pace; more extreme and intense events of weather are occurring more frequently.
 - While the Town is currently engaged in climate change discussions, and has committed to alternative energy initiatives such as recently installed solar panels on the roof of Town Hall, a more sustainable future for Torbay requires an expanded climate change perspective.

F. Adjust to the Pandemic Changes

- The COVID-19 pandemic has resulted in vast uncertainties of the future. There have been significant shifts in the manner we live our daily lives, and how often we travel and where. More individuals are also now working from home. The local need is to encourage and assist in the economic and employment transition of these home-based workers.
 - To facilitate and manage the potential of local residents working from home in Torbay, revisions to the Town's home-based business policies, bylaw regulations and approach are necessary.

G. Establish Enhanced Community/Business/Regional Partnerships

- The Town of Torbay is a growing community that is situated within a larger urban area. Economic development cannot be achieved within a silo, there are needs to engage the private sector, to focus on cultivating local leadership, and building regional capacity.

H. Keep Economic Development Priorities at a Minimum

- Often a community may become bogged down with too many economic development projects to address within too short of a period of time. The result is that often only pieces of the desired initiatives get done.
 - By limiting the number of priority economic development goals within an annual workplan for example, to six initiatives per year, the likelihood is that a more focused approach will result in shorter timeframe results, and local economic success stories.

I. Establish Neighbourhood Residential Associations

- The goals of continuing to work cooperatively and maintaining meaningful engagement with local residents can be further advanced through social and civic participation in the formation of neighbourhood associations.
- J. Be Selective, Think Long Term and Adhere to the Community Vision
- Often communities in their appetite for perceived economic prosperity entertain land development, rezoning and building development submissions on a piecemeal basis under the guise that most development is good development for the community. What sometimes results over the longer term is a disjointed number of poorly connected developments that collectively may not be the right fit for the economic success and character of the community.

6.1.2. Potential Strategies to Encourage Mixed-use Development

The purpose of this Issue Paper is to identify potential strategies to encourage mixed-use development, and to help establish increased commercial growth adjacent to public spaces, including the Torbay Town Centre.

- A. Refine the Mixed Development Intent
- Mixed Development and Mixed-Use Development are two distinct land use planning objectives. There is value in refining whether the Town wishes to continue to encourage low density single family residential uses mixed with varied commercial uses within the Torbay Road corridor, or whether a planning shift to higher density residential and complementary retail, personal service and office business uses approach is preferred.
 - Torbay Road plays a critical role as the primary entrance-way into the community. It is suggested that planning opportunities exist to dedicate the Commercial Main Street zone on Torbay Road for mixed development automobile dependent service commercial businesses, and to adjust the longer term planning intent for a smaller designated area of Torbay Road near the Town Centre for a highly designed mixed use corridor of mid-rise residential apartments, condominiums and townhouses (as shown in attached illustration) with pedestrian focused business uses.
- B. Determine if Torbay should Promote the Benefits of Mixed-Use Development
- Different communities choose mixed use forms of development for different reasons. It may be viewed as an excellent way to incorporate a mix of housing types on a small scale such as compact housing while enhancing traditional town character. Some towns utilize mixed uses to create or enhance village and town centers. It is also pursued to revitalize struggling areas. The common thread of planning for mixed uses is the ability to spur economic development.
- C. Transitioning to Strategic Mixed-Use Growth
- Torbay as a growing community has the potential to strategically transition from a growth pattern of reliance on single family residential dwellings to increasing residential densities, and encouraging targeted business growth on Torbay Road and within the

urban town centre core. To achieve this transition, a new growth and development outlook for the community needs to be embraced

D. Consider Other Mixed-Use Locations

- The limited serviced and developable land base of Torbay implies that the Town's options for economic growth should not be constrained by historic patterns of growth or by existing zoning designations on properties.

E. Provide the Tool Box

- To move towards a sustainable economic direction of support for Mixed-Use developments will require adjustment to Municipal Plan policies and Development Regulations provisions, infrastructure servicing along with financial considerations.
 - Planning for mixed uses will entail changes to reflect the preferred new permitted and accessory uses (discretionary uses are suggested to be minimized), density gradients, development and servicing standards, and site and building design guidelines. The key of success of mixed-use requirements is devise the bylaw structure in a manner that is not too onerous so as to be attractive to developers.

F. Identifying Clusters as Development Phases

- The Mixed Zone designation extends in a linear fashion on both sides of Torbay Road both to the south and north of the Town Centre. To achieve short term development success, the current extent of Mixed Zoning is suggested to be decreased in size to enable a more concentrated location of Mixed Uses potential.

G. Mixed Uses without the Residential Component

- Other forms of Mixed-Use development may include varied service commercial uses, building supply stores, and storage yards, to more light industrial and service technology business park type uses with supportive related commercial uses. Mixed Uses may further extend to a refinement of varied commercial uses and businesses.

6.1.3. Development of a Commercial/ Industrial Park

The purpose of this Issue Paper is to consider whether the availability of industrial or commercial land, particularly in the form of a commercial/industrial park, would enhance the opportunities for economic development in the Town of Torbay. It considers the regional economy, supply/demand circumstances for developed land in the region, and physical characteristics of potentially available land in the community.

Note that, while there are considerable developed areas and sites exist in the adjoining community of St. John's and throughout the Northeast Avalon region, there is currently no established area for commercial/industrial development in the Town of Torbay. However, considerable research has been conducted to identify and determine the suitability of potential sites for a Light Industrial or Business Park or area in Torbay at three sites: Airport Adjacent Site; Torbay Bypass Road Site; and Town Centre Concept.

A. Increase Commercial Land Availability for Commercial/Industrial Development

- The existence and availability of industrial land will rarely be the critical factor in a business's decision to locate in a community. Other factors including the logistical considerations of the business with respect to its market and supply chain and availability of an appropriate labor force will focus and will more likely determine the best site for the business. While it may not determine the eventual location of a business, the non-availability of reasonably priced, accessible, industrial land is certainly a limit to a community's ability to attract incremental business.
 - Develop and make available reasonably priced, accessible, commercial/industrial land in Torbay as a foundation resource for economic development.

B. Demand for Industrial Land in the Northeast Avalon Region

- In the near/medium term, there is no indication that there would be excess demand for industrial/commercial land in the Northeast Avalon Region to drive the investment by the Town of Torbay in a Business Park. The opportunity for such development would therefore need to be driven by local Torbay centered demand.

C. Attract Commercial (Office) Enterprises to Torbay

- The Town of Torbay offers a scenic, semi-rural environment which may be desirable traits for the technology and knowledge sectors. These features may make Torbay a preferred location for businesses in these sectors.
 - The Town of Torbay could position itself to be an attractive location for commercial (office) developments particularly for the technology and knowledge sectors.

D. Attract light industry to Torbay

- Would light industrial operations related to the petroleum sector be attracted to Torbay or would any development be dependent upon local markets.
 - It is unlikely that light industrial operations related to the petroleum sector would be attracted to Torbay in the near/medium term. Therefore, the opportunity for development would be dependent upon light industry focused upon serving local markets.

E. Attract Retail and Service Sector to Torbay

- There is an opportunity to develop a commercial area to attract enterprises serving a range of retail, food service, professional services, and recreational and leisure services needs in the Torbay area.

F. Attract the Accommodations Sector to Torbay

- Specifically related to Torbay, there is currently just one licensed accommodations facility in the Town (See the Sea B&B). The rural nature of the Town, its history and the natural beauty of the surrounding area all within minutes of the International Airport and downtown St. John's would be an attractive option for a subset of both business and tourist travelers to the region.

- There is an opportunity to develop a boutique-like hotel accommodations enterprise in the Town of Torbay.

6.1.4. Availability of Commercial/ Industrial Land

The purpose of this Issue Paper is to determine current availability of commercial/industrial land, the potential for commercial/industrial development on these lands and the potential for expansion of the base of commercial/industrial lands.

The Paper provides an inventory of Commercial/Industrial Land and outlines the potential opportunities for commercial/industrial development on currently zoned commercial lands and the potential for expansion of the base of commercial/industrial lands.

A: Existing Commercial/Industrial Lands

1. Zone: MIXED USE- Few new opportunities
 - The Mixed-Use Zone could be widened by extending it deeper into the Residential Subdivision Area zones;
 - The development regulations could be changed to restrict single dwelling construction in the zone.
2. Zone: COMMERCIAL MAIN STREET
 - Minimal potential – there is only one undeveloped lot
3. Zone: CDA-INDUSTRIAL (BORDERING AIRPORT)
 - There is significant land but development restricted by water contamination (refer to CBCL Reports)
4. Zone: COMMERCIAL ZONE -
 - a) Pumphouse Road Locations - This area provides the greatest potential for industrial light, industrial general, commercial/industrial potential
 - Options include rezoning of former Protected water area;
 - Consideration should be given to rezone the commercial property on the north side of the Bypass at this location with regard to potential conflict with the proposed Residential Large Lot zone which could be changed to commercial/industrial
 - b) Withrod Pond– no immediate opportunities
 - The commercial enterprises have discontinued and the buildings are used for storage; future opportunities for these sites may arise when current owners retire and sell the properties.
 - c) Near Gallows Cove Pond – no immediate opportunities
 - The new Dental office is a long-term viable commercial use; but Duffett’s heavy machinery use is not commercial and not ideal at this location; however, the company is successful and unlikely to be discontinuing this use of the site in the foreseeable future.
 - d) Evening Path – no immediate opportunities

- The original commercial uses of the property are gone and the owners have evolved the use to heavy equipment storage which is not commercial and not ideal for the location. However, once these companies are discontinued as owners retire, the non-conforming use might be discontinued and the site may become available for commercial use.
5. Zone: INDUSTRIAL LIGHT
- No new lands identified by the zoning; however, this zone should be considered for the Pumphouse Road locations
6. Zone: INDUSTRIAL GENERAL
- No new lands identified by the zoning; however, this zone should be considered for the Pumphouse Road locations

B: Potential Future Employment Generating Lands

Rural lands which could be considered for low-impact employment-generating land uses were reviewed and suggestions made regarding potential changes. More site work would be required to assess capacity for development.

6.1.1. Town Centre Development Plan

The purpose of this Issue Paper was to assess the future development and redevelopment of the Town Centre in order to facilitate economic success and to accommodate the current and forecasted growth of the Town.

- A. Is the Town Centre Concept (2014) still relevant for Torbay?
- The factors which led to the initial recommendation to establish a Town Centre and which were detailed in the Feasibility Study undertaken in 2014 are still present in Torbay.
 - A Town Centre will be a major force in Town Development making Torbay a better place to live, work and play. It will enhance community cohesion, enhance Town walkability by linking Town walking trails and provide a focal point for social events and shopping for both residents and visitors. A Town Centre will be a key element in business development for the Town by providing a locus for an increased inventory of retail, entertainment, accommodations and other commercial enterprises currently lacking in Torbay resulting increase expenditures in Town by both residents and visitors.
- B. What is the impact of the Wellness Centre on Town Centre Concept developed in 2014?
- Construction of the Wellness Centre was a major feature of the original concept for the Town Centre and the design work completed in 2014. Now that the Wellness Centre has been constructed at the Kinsmen site, there will have to be a re-thinking of the function and the design for the Town Centre.
 - However, from a purely economic development perspective, the relocation can be viewed as a positive in that it will re-focus the Town Centre concept on filling the gaps in the business sector, free up more space in the Town Centre for new unique enterprises and allow more space for greening and leisure activities.

- The major findings related to what Town Centre program elements to promote and what to avoid is still generally relevant.

Promote	Avoid
<ol style="list-style-type: none"> 1. Specialty retailers providing “boutique” unique accessible products: fashion and accessories, and hobbies. 2. Upscale dining options: bistros, quality cafes, fine dining, original concept food, and drinking establishments, 3. Health and personal care stores, sporting good stores, medical and therapeutic supplies, active living accessories, health food and nutrition stores. 4. Personal Care retail: hair and beauty salons, nail salons, tanning facilities or spa type facilities. 5. Space for civic organizations and community groups. 6. Insurance and service establishments. 	<ol style="list-style-type: none"> 1. Fast food establishments 2. Departments Stores, warehouse retailers and discount retailers. 3. Healthcare service demand such as doctors office to be confirmed at time of development.

- Develop a new plan for the Town Centre focusing on filling the gaps in the business sector, freeing up more space in the Town Centre for new unique enterprises and allowing more space for greening and leisure activities.

C. What would be included in a “New” Town Centre Concept?

- Based on current development trends, service gaps, development proposals on the table, current trends and success stories in other similar NL developments this a new program format for the Town Centre would include: a Craft Brewery; a Boutique Hotel; a high-end restaurant; coffee shop/bistro; crafts sales shops; a theatre and performance space; office space to support small business, community groups and a business incubator; a new branded East Coast Trail – Torbay Amherst Park as a gateway hub to the East Coast Trail; condo/ apartments, rentals or townhouse development focused on seniors.

D. How should the Town proceed with building the “New” Town Centre?

- The standard business planning approach to building the “new” Town Centre, in light of the fairly long time which has elapsed since the feasibility study was completed and the major change to the concept with the relocation of the Wellness Centre, would be to redo the planning process starting with undertaking a new feasibility study.

- However, in this case the Town might wish to consider a more aggressive approach. Factors which support a more aggressive approach are: the primary factors which led to development of the original concept still exist in Torbay; there is broad support for the concept; the site has been identified and evaluated; and, the concept has been around since 2009 and further delays risk fatiguing residents and key stakeholders
 - Proceed conjointly with obtaining ownership/control of the land and updating the Town Centre Plan and feasibility assessment. This is a low risk approach in that if the Town Centre does not proceed then the Land is a liquid asset while at the same time providing a strong signal to residents/investors that the Town is serious about proceeding with the concept and reduces the length of time for development once detailed planning is completed.

7. BUSINESS SECTOR ASSESSMENT

7.1.1. Business Sector Inventory

There was a total of 158 businesses registered with the Town of Torbay in July 2020. Tract has reviewed this listing and prepared an inventory of businesses by category for 135 of these businesses as shown in the table on the following page. Tract was unable to categorize 33 of the businesses based upon available information and Town staff are following up and will provide advice regarding appropriate categorization.

Observations arising from the inventory include:

- significant number of home-based businesses (33% of total businesses)
 - 35 shown in red on the Inventory
 - an additional 17 of the uncategorized businesses
- good number of businesses in fields of:
 - construction and home improvement
 - accounting/tax
 - autobody (but just one auto repair garage)
 - child services
 - lawn and garden
 - pet services
 - fast food restaurants
- good coverage on health care/wellness
- lack of businesses for residents and visitors to spend their leisure money:
 - only one coffee shop
 - no family or dining level restaurants
 - just one bar/pub
 - no accommodations
 - small number/range of retail outlets
- lack of some professionals:
 - no lawyers
 - lots of pet services but no veterinarian
 - no realtor office

Business Inventory Framework - Torbay

Sep-20

General Information				
Population (2016 Census)	7,699		Chair/Champion	
Business Industry Leadership			Annual Budget (if relevant)	
Local Business Group/Committee			Available Partners/Volunteers	
CATEGORY				
1. Primary Industries				
Agriculture - Farms	BURSELL CANTWELL	CONNOR'S FARM LIMITED	ROSE RYAN	TAPPER
Agriculture - Specialty Gardening	TRAVERSE GARDENS			
Fishery				
Forestry				
Mining				
2. Construction				
Heavy Civil Construction	COADY CONSTRUCTION & EXCAVATING LTD	WHITES EXCAVATING & TRUCKING INC.		
General & Residential Contractors	TRIPLE "A" EXCAVATING LIMITED			
Specialty - Roofing	KEVIN J. KEATING LIMITED	NINO CONSTRUCTION	SEA CONTRACTING LTD.	NL CONSTRUCTION INC.
Specialty - Plumbing	ONYX CONSTRUCTION LTD.			
Specialty - Electrical	W.R.H. CONSTRUCTION INC.	NEWTECH ROOFING LIMITED		
Specialty - Kitchens	NL PLUMBING & HEATING INC.	TYRONE GOSSE PLUMBING AND HEATING INC.		
Equipment Rental	709 ELECTRICAL LTD.	DAVE LACEY ELECTRICAL	HOOK-ER UP ELECTRIC LTD.	MORRISSEY ELECTRICAL
	WHITTY'S ELECTRICAL			
	ELITE KITCHENS & DESIGN INC.	THE CABINET MAKER		
	BDP CONTRACTING SERVICES INC.			
3. Manufacturing				
Fabrication	CAHILL FABRICATION STRUCTURAL LIMITED			
4. Business Services				
Accounting & Tax Services	COASTAL ACCOUNTING & BUSINESS CONS.	H&R BLOCK	GW TAX & ACCOUNTING LTD.	TRUE NORTH TAX SERVICES
Arts, Culture & Entertainment				
Auto Sales & Service	Family Entertainment	STOKES & COMPANY LTD. (Breakout)		
	Dealers			
	Auto Body	DESIGNER AUTOBODY	EASTERN AUTO GLASS LTD.	THE COLLISION CLINIC LIMITED (TORBAY)
	Garage	MAX'S AUTO REPAIRS LTD.		TONY'S COLLISION CENTER LTD.
	Towing	AA TOWING LTD.		
Banking & Finance		ROYAL BANK OF CANADA		
Business Services				
	Cleaning	JANITORIAL SALES & SUPPORT LIMITED		
	Office	KNLP OFFICE SERVICES INC.		
	Business Consulting	PEGGY MATCHAM CONSULTING INC.		
Community Organizations				
Child Services				
	Daycare	ACTIVITY ZONE	FARRELL	PADDY CAKES FAMILY CHILD CARE
		BUSY BEES	MILESTONES/2 DOYLES & QUIGLEYS	POWERFUL PLAY
Computer & Internet Services		EAGLE RIDGE CHILDCARE	MILESTONES/8 WATTS POND RD LOC	THE LEARNING TREE CHILDCARE INC.
Education				
	Music	MUSIC FOR YOUNG CHILDREN		
	International	NEWFOUNDLAND INTERNATIONAL STUDIES LTD.		
Environmental				
	Recycling	EVERGREEN RECYCLING		
Health & Wellness				
	Holistic	CIRCLE OF LIFE ENERGETICS		
	Fitness	PLATINUM PRO FITNESS LTD.		
Health Care				
	Pharmacy	DISTRICT DRUGS LIMITED		
	Dentists	TORBAY MEDICAL CLINIC		
	Dentists	TORBAY DENTAL OFFICE		
	Physio/Chiropractic	FRESH HEALTH & WELLNESS (PHYSIO & CO.	KINETIC CHIROPRACTIC & HEALTH CLINIC	
Home Improvement				
	Lawn & Garden	NUTRI LAWN NFD. & LAB. LAWN	EVANS NEWLEAF LANDSCAPING LTD.	GOSSE'S LANDSCAPING LIMITED
		RLS LANDSCAPE CARE		GOSSE'S EXCAVATING LTD.
	House	VALOR CHIMNEY INSPECTION INC.	RIGHTWHEY CONTRACTING	GRIFFIN'S CARPENTRY INC.
	Water Sewer	SK SERVICES LTD.		
	Fence	EAST COAST FENCING LIMITED		
Insurance				
Legal Services				
	Lawyers			
	Discoveries	DISCOVERIES UNLIMITED INC.		
Lodging & Travel				
	Hotel/Motel			
	B&B	C THE SEA LTD.		
Marketing & Advertising				
		ADVANTAGE SIGNS & GRAPHIC DESIGN LIMITED		
News & Media		INTUITIVE MEDIA INC.		
Personal Services				
	Tanning	SJOLIE SUNLESS LTD.		
	Hair	HAIR ROOM	L.W. HAIR SERVICES	SALON SOLACE
		VIBE SALON	WANDA COOPER SALON	TORBAY UNISEX
Professional/Technical Services				
	Funeral	W.J. CAUL FUNERAL HOME LIMITED		
	Surveying	AUBREY K. BURT SURVEYS LTD.		
	Photography/Restoration	ATLANTIC HORIZON IMAGING		
	P.R. Events	CANDACE MOAKLER EVENT ARCHITECT INC.		
	Interior/Exterior Design	ENNE INTERIOR & INTERIOR LIVING	ROOM BEAUTIFUL	
	Drone	OVER DRONE SERVICES INC.		
	Safety	TIS SOLUTIONS INC.		
Pet Services				
	General	A DOGS WORLD INC.	GROOMINGDALES	THE KILLOX DOG WELLNESS CENTRE
	Crematorium/Cemetery	DEVONSHIRE PET MEMORIAL SERVICES		
Real Estate		ESTATE SALES & APPEAL CONSULTING		
Restaurants & Nightlife				
	Fast Food	ATLAS PIZZA	MARY BROWNS INC.	WING N IT ENTERPRISES INC.
	Coffee/Deli	THE TRADITIONAL COFFEE HOUSE & DELI		P.J.'S GROCETERIA (P.J.'S PIZZA)
	Family			
	Dining			
	Bar/Pub	STOKES & COMPANY LTD. (Liddy)		
Shopping & Retail				
	Bakery	TORBAKERY		
	Specialty	NEWFOUNDLAND VINTNERS	TAYLOR'S SEAFOODS	
	Convenience	P.J.'S GROCETERIA LIMITED	CHARLIE'S CONVENIENCE	CIRCLE K (COUGHIE YARD)
	Craft/Gift	QUILTER'S QUEST FABRIC & QUILT SHOPPE	THINK OUTSIDE THE BOX	TRAILS END CONVENIENCE LTD.
	Grocery	FOODLAND		
Sports & Recreation				
Transportation				
	Crate/Warehousing	MAX DUFFETT & SONS LTD.		
	Trucking	BOT TRUCKING INC.		
	Logistics	NEXUS LOGISTICS INC.		
Utilities				
	Propane	B & C PROPANE SERVICES	C.S.A. PROPANE SERVICES INC.	
	Oil	WILLIAM TAPPER LIMITED		
Telecommunications				
	Electricity	BELL ALIANT (A DIVISION OF BELL CANADA)	BELL MOBILITY INC.	ROGERS' COMMUNICATIONS PARTNERSHIP
		NEWFOUNDLAND POWER INC.		
Wedding, Events & Meetings				
Wholesale Suppliers		HARVEY CODNER BROKERAGE LIMITED	DWAYNE LAKE SALES	

7.1.2. Tourism Sector Inventory

As part of the Business Sector assessment, Tract undertook preparation of a separate inventory of the Tourism Sector in Torbay. The basis for the inventory was the tourism database maintained by the Provincial Government. This database was augmented by information from the Town's business registry and information from Town staff.

The Tourism Inventory is divided into three major categories: i) Demand Generators/Demand Supporters; ii) Traveler Services; and iii) Marketing.

Observations arising from the inventory include:

- Demand Generators/Demand Supporters
 - Natural Assets: Town does have a selection of trails (both East Coast and Town); a Beach; lookouts and is establishing a community garden.
 - Cultural Assets: Only Frenchman's Ridge identified
 - Built Assets: The History House plus a number of structures of mainly local interest
 - Festivals and Events: 4 events
 - Experiences for visitors: A self-guided audio tour, Breakout Room and the regional Arena
- Traveler Services
 - Fixed Roof Accommodations: Just one B&B
 - Campgrounds: None
 - Restaurants: A selection of fast-food outlets along with a bakery and one coffee house
 - Shopping (craft/unique retail): Three shops
 - Pubs: Only one – Mrs Liddy's
 - Visitor Information: none
 - Support Services: Good range of support services
- Marketing
 - Minimal

*"The primary goal of the tourism industry is to bring more cash into the local economy. This doesn't happen when visitors come into the community, get out of their cars, and take photographs. And it doesn't happen when visitors go swimming in the lake at your park all day, sunning, and eating the lunch they brought from home. And it doesn't happen when visitors hike down your trails, enjoy your interpretive centers, or stroll through your lovely arboretums. These are all great things to do, and, of course, you do want your visitors to do these—but, you also want to entice them into your shops, your cafes, espresso stands, restaurants, galleries, B&B's, and hotels, ultimately opening their wallets to make purchases. That is what helps your local economy, your small merchants, your hoteliers, and your tax coffers". **Roger Brooks, International Tourism Consultant***

In summary, for Torbay to achieve significant benefits from the Tourism Sector it would need a signature demand generator in addition to its natural assets to attract visitors and a range of visitor services (accommodations, shopping, restaurants, pubs) to allow them to spend their money.

The outcomes from tourism research show that: i) Shopping, dining and entertainment accounts for 80% of non-lodging visitor spending; and ii) 70% of all consumer spending takes place after 6 pm.

Tourism Inventory Framework - Torbay

Aug-20

CATEGORY

Population (2016 Census)	7,899
Tourism Industry Leadership	
Local Tourism Group/Committee	
Chair/Champion	
Annual Budget (if relevant)	
Available Partners/Volunteers	

Demand Generators (DG), Demand Supporters (DS) - Classify each with symbols

1. Natural Assets: Scenic view points, trails, parks, etc.	
TRAILS	East Coast Trail – Silver Mine Head Path East Coast Trail - Father Troy's Trail Town -Upper Three Corner Pond Park Trail Network Town -Western Island Pond Trail Network Town -Woodbridge Park Trail Network Town - Island Pond Brook Trail Network
BEACHES/SWIMMING	Torbay Beach
GARDENS/COMMUNITY PARKS	
LOOKOUTS	
2. Cultural Assets: Human activity sites (tangible and intangible), art, heritage, culinary, industrial	
ART/CRAFT STUDIO	
THEATRE, MUSIC	
3. Built Assets: Heritage homes, unusual buildings and structures unique to the area	
MUSEUMS	
4. Festivals/Events Designed for Visitors: Include dates, indicate Quality Assurance Compliance	
FESTIVALS	Holy Trinity R.C. Garden Party Holy Trinity Parish Fall Fair Christmas Craft Fair
5. Experiences Designed for Visitors: Indicate Quality Assurance Compliance	
Angling Tours	
Bird Tours	
Boat, Ocean, Iceberg, and Whale Watching Tours	
Hiking and Walking Tours	
Cultural Tours	
Day and Multi-day Tours	
Winter Tours	
Snowmobile & ATV Tours	
Family Attractions	Breakout NL
Biking	
Climbing, Zip Lining, Caving	
Canoeing, Kayaking	
Seadoo	
Golf	
6. Special Projects for Distinct Markets: Meetings, cruise, training, etc.	
7. Underdeveloped Prospects: Projects identified for development	

Traveler Services

1. Accommodations: Indicate Canada Select; TAP Quality Assurance Compliance	
i. Fixed Roof	See the Sea Bed & Breakfast
B & B	
Cottages	
INNS, HOTELS, RESORT	
SUITES	
ii. Campgrounds/RV Parks	
CAMPING	
2. Restaurants/Dining: Indicate Fine Dining (FD), Fast Food (FF)	
Family Restaurant	
Fine Dining	
Fast Food	
3. Shopping: Indicate crafts and unique retail	
CRAFT/ART	Treasure Cove Antiques & Collectibles
4. Visitor Information Services	
5. Support Services: Groceries, banking, liquor stores, health services, parking, transportation	
Grocery Store	Yes
Liquor Store	Yes
Pharmacy/Health Services	Both
Baking	Yes
Parking	Yes
Transportation - Bus	
Transportation - Port	

Marketing

1. Marketing Strategy	
2. Marketing Resources: Staff, budget	
3. Other	

8. ENGAGEMENT

Torbay Community Engagement – Summary of Focus Group, Stakeholder Interviews, Resident Survey and Business/ Stakeholder Surveys

8.1.1. Summary:

Responses in all of the forms of community engagement were surprisingly consistent:

- People love the community (beauty, views, rural but close to urban, friendliness) although there is not a sense that residents or Town Council truly support or understand businesses
- There are many opportunities and niches for business and economic development (listed below)
- Some critical issues that need to be addressed that impact both community vitality and tourism development (these are critically linked) are sidewalks, sewage, drinking water, better roads, striking a balance between long-term residents and new residents while working to integrate these groups, creating a town centre/ downtown core with performing arts space, and developing housing for seniors (allowing them to remain in Torbay)

1. Business/Stakeholder Roundtable Summary (September 30th, 2020)

Underdeveloped Business/Economic Development Opportunities for Torbay

- Microbrewery – current concept is to be located in the Town Centre area and include a performance area
 - latter idea fits with Folk Arts Council needs
 - noted that coffee shops and microbreweries have been shown to kickstart economic development in towns
- Restaurant
- Accommodations
- Music and/or arts programs to engage children at all age levels
- Dedicated Arts Centre – visual and performing
- Town Centre with various facilities/businesses including:
 - Microbrewery
 - Accommodations (e.g. hotel)
 - Accommodations (Apartments or condos particularly for seniors)
 - Small businesses
 - Business incubator (possibly Town can provide land at low cost to promote growth)
- Jack Byrne Arena – need to take better advantage of it
- Boat Tour (problem noted with congestion problems at Tappers Cove which would interfere with the commercial fishermen)
- Apartments/condos for persons retiring

Challenges to Doing Business in Torbay

- Closeness to St. John's results in investors not wanting to take a chance on Torbay
- Town Council (Town Hall)
 - Not business oriented – noted examples: i) gym opening in CBS which had visits from Mayor/ Councilors versus similar opening in Torbay which was ignored ii) purchaser of only Drug store called to inform Town and was asked “which drugstore”
 - Takes a long time and effort to get permits for development
 - Physical accessibility of Town Hall and officials during pandemic
 - Need better two-way communication
- Lack of land which is readily available for commercial/industrial enterprises
- Torbay people do not support their own – need something substantial to draw a crowd

What Makes it Good to do Business in Torbay

- Closeness to St. John's – big market
- Close to airport
- More land for builders
- Views – need to exploit
- Lots of new people
- People
 - Community-oriented
 - Church-based town
 - Great people – both young and old – need to tap energy
- Fire Department
- Schools
- Sports/Recreation – programs for all ages (but need to communicate better)
- Town Hall – noted great help from town officials with film production needs

Top Priorities for Development

- Town Centre (3)
- Arts Centre
- “The Bubble”
- Apartments/Condo's (particularly for seniors)
- More commercial land
- Better access roads
- Streamline Town Hall – permit process and assistance for entrepreneurs

2. Stakeholder Interviews (October 6-10th, 2020)

Underdeveloped Business/Economic Development Opportunities

- Seniors housing options - Condos/apartment buildings for residents planning retirement vs having to move into St. John's
- Increase new home builds on the south side of Torbay
- Town has achieved success in many areas, "let's do more....and do it right"
- More day cares for young families
- Lack of additional potable water in Torbay is real.
- Restaurant / Microbrewery / Accommodations to support tourism "destinations" for families and visitors
- Jack Byrne Arena – can be so much more!

Challenges to Doing Business in Torbay

- No local patronage - Residents of Torbay do not support local businesses
 - Many residents do not have a "Shop Local" mentality – needs promotion
- No specific "Business District" area, businesses are spread out
- Town Hall/Staff /Councilors – may have limited business-oriented knowledge to assist new and existing ventures
- Lack of business park – needs immediate priority to address barriers – whatever it takes
- Application for local business can be delayed by significant 'red tape' and bureaucracy at Town Hall
- Unfair rate of taxation, makes expansion/growth by owners impossible
 - Ensure fair taxation, i.e. address issue of unregistered B&B's in Torbay that are currently paying no tax or fees to the Town

What Makes it Good to do Business in Torbay

- Town's size could support in-house seasoned engineer, guiding Council and staff, which could help with enhanced project management toward reduced over expenditures on future town projects
- People are friendly
- establish a 'downtown core'
- Good mix of new and long-time residents
- Visitors/tourists are reliable supporters
- Friendly residents, hardworking, most keep up their properties
- New community centre "The Common" has something for everyone
- Proximity to St. John's, airport and local schools
- Town quite supportive of all residents living at seniors' home – entertainment, outings, etc.
- Always bear in mind seniors' limitations. Work with them

Top Priorities for Development

- Restaurant, Family-friendly Pub, etc.
- Increased daycare space
- Eventually a Town Centre
- Variety of “Senior Living” developments
- Performing Arts Centre
- Town to review and address concerns and issues identified from this process hopefully to reduce red tape and significant delays
- Given age of the existing water/sewer infrastructure, the Town may need to start working on a multi-year replacement strategy vs a reactive approach (fix it when it broken)

3. Business / Stakeholder Survey (Community Economic Development and Assessment Initiative)

The **Community Economic Development Assessment and Action Initiative (CEDAAI)**¹ takes a snapshot **assessment** of the business-friendliness, and community and economic health using the perceptions of key community stakeholders using a short survey.

What is measured in CEDAAI:

- **Entrepreneurial Energy** - Can we harness our ideas and energy?
- **Investment and Natural Assets** - Do we have the right mix of capital and talent?
- **Cooperative Advantage** - Are we cooperating for maximum benefit?
- **Institutional Capacity** - Do we have the necessary infrastructure and institutions?
- **Connectors and Champions** - Do we have the necessary linkages to make things happen?
- **Community Vitality** - Are we attractive to existing residents and potential newcomers?
- **Attitudes** - Are we committed to building a positive future?

Businesses and Key Stakeholders Surveys (16 respondents):

- 10 people responded that they currently operate a business in Torbay; 6 do not
- 10 male respondents; 6 female
- 15 of 16 respondents were 45 years of age or older; most common response was 45-54 (at 8 responses or 50%)
- 12 of 16 respondents have lived in Torbay for 5 or more years; most common response was 20+ years (at 7 responses or 44%)
- 50% of respondents considered themselves to be influential; 50% said not usually influential

Words to Describe Community (responses in order; only top responses listed)

¹ Municipalities Newfoundland and Labrador (MNL), with funding support from the Government of Newfoundland and Labrador, and the Government of Canada, partnered with the Centre for Innovative and Entrepreneurial Leadership (CIEL – www.theCIEL.com) to develop CEDAAI.

- Scenic /Beautiful
- Proximity/ Close to St. John's
- Bedroom community
- Family-oriented
- Safe
- Clean

Strengths

- Near St. John's
- Schools
- Sense of community/residents
- East Coast Trail/ trail network
- Safe

Undeveloped Business or Economic Opportunities

- Restaurants
- Business Support (e.g. Chamber, trade show)
- Tourism & Culture/ Adventure tourism
- Activities for family/ youth

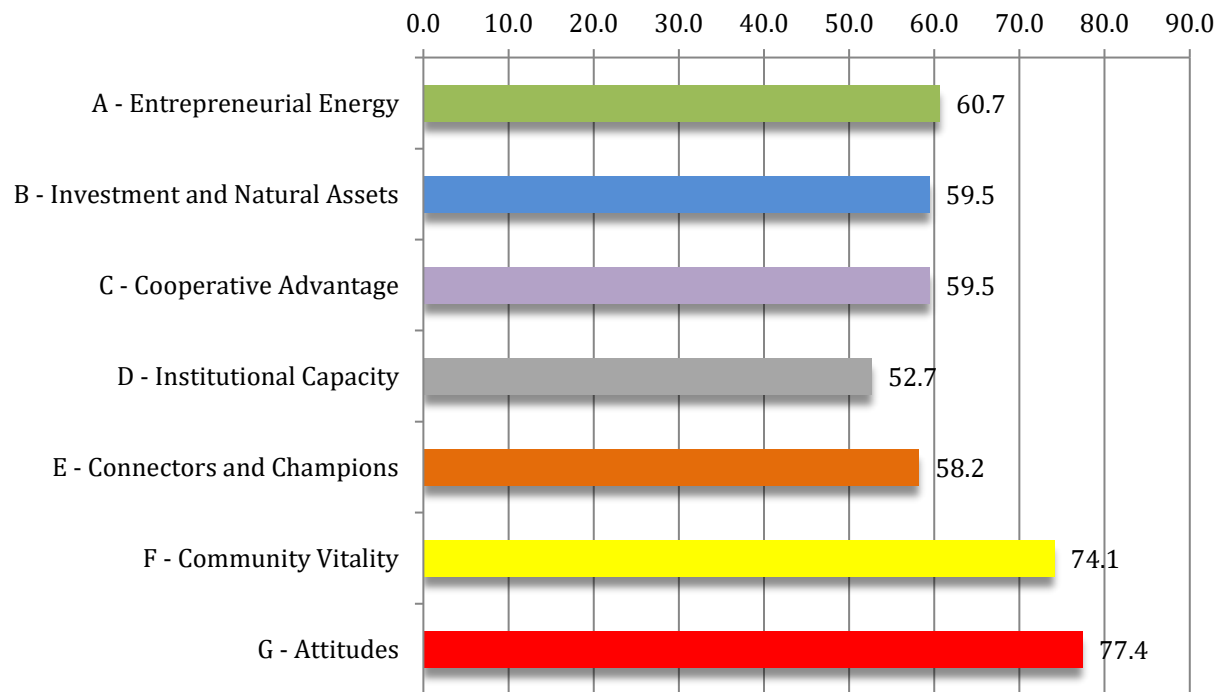
Drivers of economy

- Work in St. John's
- More business
- Promotion of business

Section Scores – Community Economic Development Assessment and Action Initiative (CEDAAI)

NOTE: Interpreting scores - If all participants completely agreed with a question, the question would receive a score of 100. Alternately, if all participants completely disagreed with the question, the overall question score would be zero. In the case of *neither agree nor disagree*, if all participants answered a question with this option the question score would be 50.

**Torbay - Autumn 2020 - Community Economic Development
Assessment - Business & Stakeholders - Section Scores (out of 100)**



10 Highest Scoring Questions

1	A6 Successful businesses want to remain in the community.	87.5
2	F1 Young adults (25-34) consider the area to be a desirable place to live.	84.4
3	C1 We collaborate and cooperate with neighbouring communities.	81.3
4	G4 The community has a distinct culture and heritage that is appreciated by its citizens and those visiting.	81.3
5	G1 We capture our community's stories (both good and bad) and retell them with a sense of pride.	78.1
6	G6 This town believes in itself. We think that with enough support, we can do anything.	78.1
7	G5 The community celebrates the arts and supports local artists.	77.8
8	F3 There is a good balance between new ideas and respect for tradition and history.	75.0
9	F4 There are friendly public spaces where a variety of kinds of people feel welcome: parks, squares, fountains, outdoor cafes, benches, playgrounds.	75.0
10	F6 Local middle-income earners can afford to buy a house in the community.	75.0

10 Lowest Scoring Questions

33	A5 Citizens are motivated to learn new skills and to develop existing ones.	55.6
34	B6 The community has the ability to access funding and develop opportunities.	54.2
35	E1 There is a recognized individual or organization that helps people to identify, assess, expand, create and connect business opportunities.	54.2
36	E5 Groups with similar interests form alliances and co-operate to achieve goals.	53.1
37	D6 There is a good up-to-date community vision or plan that leaves room for opportunities and articulates the community's values.	50.0
38	E3 Members representing interests of the public, private and government sectors jointly participate in community decision-making.	50.0
39	C2 Business and area groups/ sectors have a voice in local government decisions (e.g. infrastructure, improvements, transportation, etc.)	46.4
40	C5 Businesses in the region jointly market their products and services as a group, locally and in other regions.	46.4
41	B3 There are formal and informal forums (conferences, workshops, association lunch meetings) on business, technology and technology and technology applications.	35.7
42	D3 There is a vibrant downtown centre or community core.	31.3

4. Resident Survey on Community Vitality

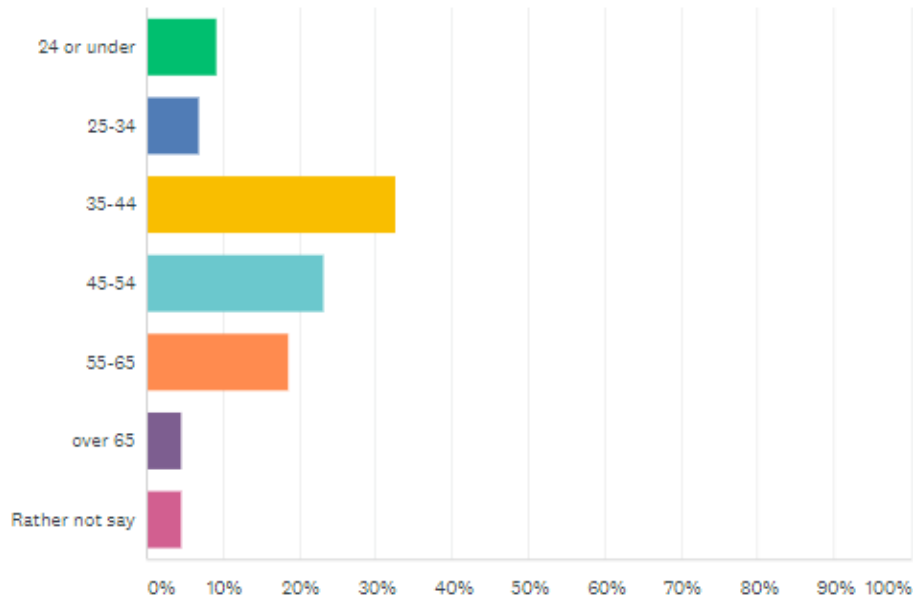
Survey of Residents – 12 Questions on Community Vitality – Conducted late September/ Early October 2020

- 43 Respondents; 54% female
- 63% employed, 19% retired, 9% self-employed
- 63% work in St. John's, 7 % at business in Torbay, 17% at home in Torbay
- 80% have lived in Torbay at least 10 or more years; 14% less than 5 years

Q2

A2. Age:

Answered: 43 Skipped: 0



Words to Describe Torbay (responses in order; only top responses listed)

- Beautiful/ scenic/ ocean view
- Bedroom community/ 5 minutes past suburbia
- Speeding/ traffic
- Peaceful/ quiet
- Home
- Needs sidewalks
- Rural/ rustic
- Friendly

Strengths of Torbay

- Nature's doorstep/ East Coast Trail/ walks
- Beach/ harbour/ ocean
- Small town feel (next to city)
- People/ friendliness
- Land/ space/ green space

New Business or Expanded Business Services You Would like to See

- Restaurant(s); especially dine-in
- Small retail/ boutiques

- Paving/ Sidewalks
- Café
- Larger grocery store
- Pedestrian shopping
- Marijuana store
- Pool
- Clinic (medical and dental)
- Craft brewery
- Tour operator

Town Development Initiatives Which would Improve Torbay

- Sidewalks
- Sewage and water treatment
- Better roads
- Better/ more connected trails (e.g. Western Island Pond)
- Town supporting locals in their businesses
- Pool
- ATV trails/ get them off the streets

Biggest Challenges in the Next 5 Years for Torbay

- Debt/ taxes/ money to Town and staff
- Water supply & sewer
- Aging population
- Walking/ pedestrian challenges
- Covid

Torbay - Resident Survey of Community Vitality Autumn 2020 - 43 Responses (scores out of 100)

