REPORT

PREPARED BY HEMSON FOR THE COUNTY OF SIMCOE

Growth Forecasts And Land Needs Assessment

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Glossary of Terms

Delineated built up area (BUA) – all lands within the *delineated built boundary.* That is, lands within the limits of the developed urban area as defined by the Minister in consultation with affected municipalities for the purpose of measuring the minimum intensification target according to the *Growth Plan*.

Designated greenfield area (DGA) – lands within *settlement areas* (not including *rural settlements*) but outside *delineated built up areas* that have been designated in an official plan for development and are required to accommodate forecasted growth to the horizon of the *Growth Plan*. *Designated greenfield areas* do not include *excess lands*.

Delineated built boundary – the limits of the developed urban area as defined by the Minister in consultation with affected municipalities for the purpose of measuring the minimum intensification target in the *Growth Plan.*

Employment area – areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities.

Municipal comprehensive review (MCR) – a new official plan, or an official plan amendment, initiated by an upper- or single-tier municipality under section 26 of the Planning Act that comprehensively applies the policies and schedules of the *Growth Plan.*

Primary settlement areas (PSA) – locations set out in Schedule 8 of the *Growth Plan. Primary settlement areas* are the *settlement areas* of the City of Barrie, the City of Orillia, the Town of Collingwood, the Town of Midland together with the Town of Penetanguishene, and the *settlement areas* of the communities of Alcona in the Town of Innisfil, Alliston in the Town of New Tecumseth and Bradford in the Town of Bradford West Gwillimbury.

Regional market area (RMA) – refers to an area that has a high degree of social and economic interaction. The upper or single-tier municipality, or planning area, will normally serve as the *regional market area.* However, where a *regional market area* extends significantly beyond these boundaries, then the *regional market area* may be based on the larger market area. Where *regional market areas* are very large and sparsely populated, a smaller area, if defined in an official plan, may be utilized.

Rural lands – lands which are located outside *settlement areas* and which are outside *prime agricultural areas.*

Rural settlements – existing hamlets of similar small *settlement areas* that are long-established and identified in official plans. These communities are serviced by individual private on-site water and/or private wastewater systems, contain limited amount of undeveloped lands that are designated for development and are subject to official plan policies that limit growth. All *settlement areas* that are identified as hamlets in the Greenbelt Plan, as rural settlements in the Oak Ridges Moraine Conservation Plan, or as minor urban centres in the Niagara Escarpment Plan are considered *rural settlements* for the purposes of this Plan, including those that would not otherwise meet this definition.

Simcoe Census Division – the geographic area covering Simcoe County and the Cities of Barrie and Orillia. It is almost equivalent to the *Simcoe Sub-area* but includes the First Nations reserves of Christian Island 30 and 30A and Mnjikaning First Nation.

Simcoe Sub-area – the geographic area consisting of the County of Simcoe, the City of Barrie and the City of Orillia.

EXECUTIVE SUMMARY

This Growth Forecast and Land Needs Assessment Report has been prepared as background research for the County of Simcoe's Municipal Comprehensive Review. The report establishes the long-term growth outlook for the County based on a 30-year time horizon and population and employment forecasts prescribed by the Provincial Plan *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (the Growth Plan). It also determines the amount of urban land required to accommodate the growth outlook using an approach that divides the County into a Southern Regional Market Area and a Northern Regional Market Area.

The two Regional Market Area approach is consistent with historical growth patterns in Simcoe, the Provincial policy framework as set out in the Provincial Policy Statement 2020 and the Growth Plan, the needs of the local real estate market for housing and employment lands, the location of Provincial transit investments, local municipal growth plans, and good planning principles.

The County's population will grow by 194,000, from 361,000 in 2021 to 555,000 in 2051. This represents a significant amount of growth over the next 30 years. Most growth will be generated by in-migration from the Greater Toronto Area.

About 63% of all population growth is forecast to occur in the Southern Regional Market Area, mainly in the Towns of Innisfil, Bradford West Gwillimbury, Essa, and New Tecumseth where significant growth is already taking place. Population growth in the Northern Regional Market Area is forecast to be concentrated in large, well-established urban centres such as Collingwood, Midland, Penetanguishene, and Wasaga Beach, as well as in municipalities that have advanced plans for development such as Clearview and Springwater.

The County of Simcoe does not require substantial additional Community Area on a County-wide basis to accommodate the long-term population growth to 2051 established by Schedule 3 to the Growth Plan. However, the Community Area Land Needs Assessment demonstrates that:

- There is an additional Designated Greenfield Area land need of 1,156 hectares to accommodate growth and meet housing market demand in the Southern Regional Market Area.

- In order to address the additional Southern Regional Market Area land need of 1,156 hectares, new Designated Greenfield Area will be required in Innisfil (70.2 hectares), Bradford West Gwillimbury (502.6 hectares), Essa (134.8 hectares), and New Tecumseth (448.4 hectares).

The County's employment base will grow by 81,000 jobs, from 117,000 in 2021 to 198,000 in 2051. About 34,340 new jobs will require Employment Areas for their activities.

The County requires an additional 500.9 hectares of Employment Area on a County-wide basis to accommodate long-term employment growth to 2051 established by Schedule 3 to the Growth Plan. The Employment Area Land Needs Assessment demonstrates that:

- There is an additional Employment Area need of 177.4 hectares to accommodate employment land employment growth in the Southern Regional Market Area.
- There is an additional Employment Area need of 323.4 hectares to accommodate employment land employment growth in the Northern Regional Market Area.
- In order to address the additional Southern Regional Market Area land need of 177.4 hectares, new Employment Area will be required in New Tecumseth.
- In order to address the additional Northern Regional Market Area land need of 323.4 hectares, new Employment Area will be required in Collingwood (210.8 hectares), Wasaga Beach (72.7 hectares), and Clearview (38.7 hectares).

The Regional Market Areas will need to be identified in the new County Official Plan. The location and configuration of the additional Community Area lands in the Southern Regional Market Area and Employment Areas in the Northern and Southern Regional Market Areas will be addressed in a subsequent phase of the Municipal Comprehensive Review.

1. INTRODUCTION

This Growth Forecasts and Land Needs Assessment report forms part of Hemson Consulting's retainer with the County of Simcoe to prepare background studies to support the County's Official Plan update, or municipal comprehensive review (MCR). The MCR forms part of a process to bring the Official Plan into conformity with the Provincial Plan *A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020* (the Growth Plan).

The main purpose of the report is to determine:

- the long-term growth outlook for Simcoe, based on a 30-year time horizon and population and employment forecasts prescribed by the Growth Plan;
- the amount of urban land required to accommodate the growth outlook.

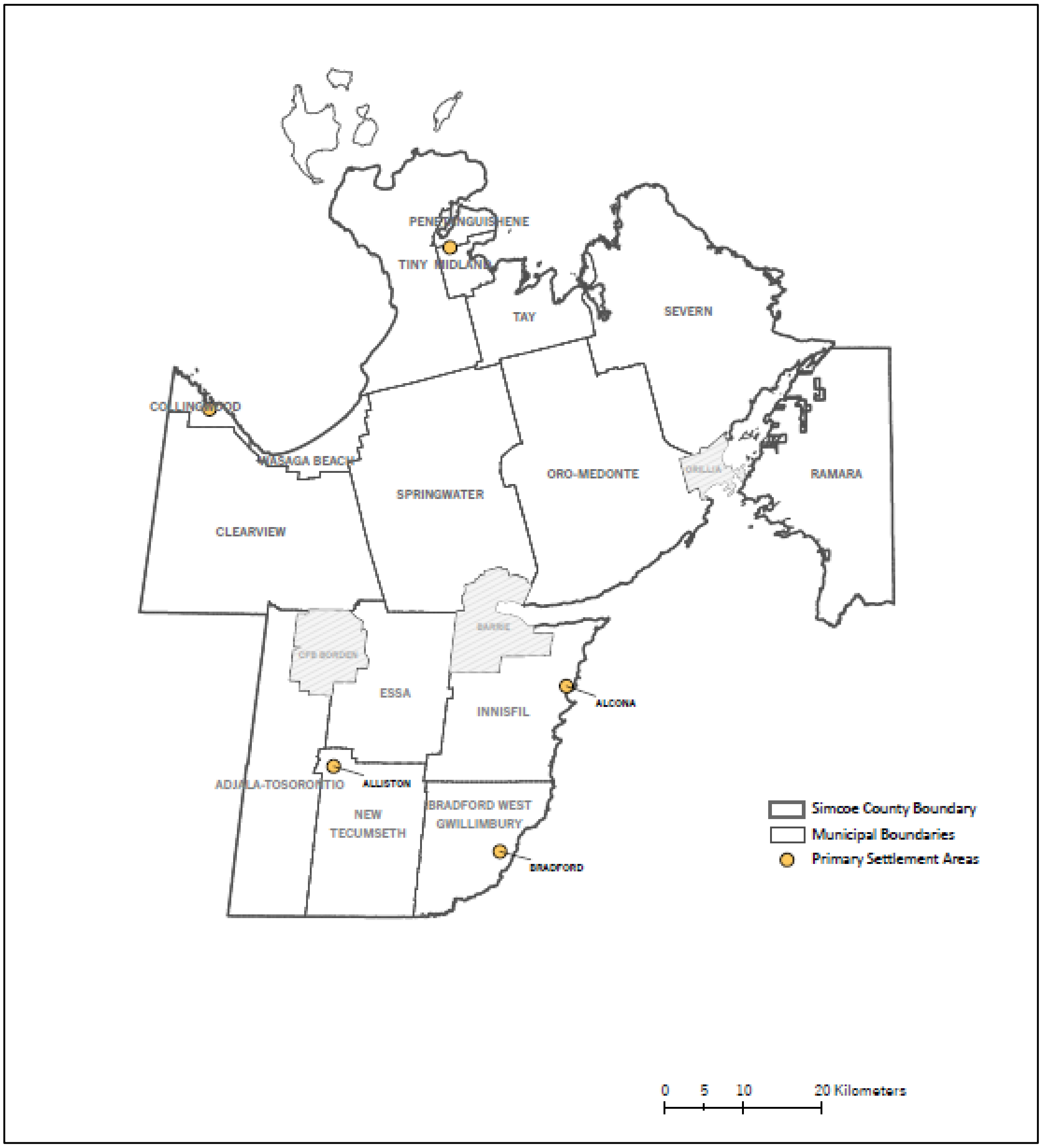
A. LOCATION AND COUNTY CONTEXT

Simcoe County is an upper-tier municipality located just north of the Greater Toronto Area, to which it is connected by Highway 400. It contains approximately 4,900 km^2 of land situated roughly between Lake Simcoe, Georgian Bay, the Niagara Escarpment, and the Oak Ridges Moraine. There are 16 lower-tier municipalities in the County, each with a distinct pattern of settlement and plans for managing growth and development.

The County exhibits a wide range of urban and rural land uses, a diverse economy that includes agricultural, industrial, and tourism-related employment, and a rich natural heritage system. Municipal services such as libraries, paramedics, long-term care, social housing, regional land use planning, waste management and arterial roads infrastructure are generally provided by the County government while lower-tier municipalities are responsible for other local services, including the delivery of water and wastewater infrastructure. Land use planning is closely co-ordinated, with the County being responsible for guiding overall growth and development primarily through its Official Plan and acting as the approval authority or key commenting agency for many development plans.

Figure 1 identifies the County and its lower-tier municipalities, including primary settlement areas as defined by the Growth Plan. The Cities of Barrie and Orillia, given they are separated municipal jurisdictions, are excluded from the forecasts and land needs assessment contained in this report.

Figure 1 – Map of Simcoe County and Lower-Tier Municipalities



Source: Hemson Consulting (2022)

B. MUNICIPAL COMPREHENSIVE REVIEW (MCR) PROCESS

The MCR is a specific planning process used to bring an Official Plan into conformity with the Growth Plan. The scale of the work involved in the MCR is necessarily broad. It establishes the overall pattern of development and environmental management in the County and sets the stage for more detailed local planning.

The County is located within the Outer Ring of the Greater Golden Horseshoe (GGH) as defined by the Growth Plan. The Growth Plan includes detailed policies for planning for future population and employment and establishing settlement area boundary expansions and official plan reviews. Section 6 of the Growth Plan includes specific policies for managing growth in the Simcoe Sub-Area, which covers the County and the Cities of Barrie and Orillia.

All County Council decisions made in respect of these matters must conform to these policies. As such, the Growth Plan is the crucial policy document guiding the MCR.

Schedule 3 of the Growth Plan requires that the County plan to achieve a minimum population of 555,000 and employment of 198,000 by 2051. This represents population and employment growth of about 54% and 69% respectively from today (see Table 1).

Table 1: Simcoe Population and Employment Forecasts to 2051

	Population	Employment
2021	361,000	117,000
2051	555,000	198,000
Growth 2021-2051	**194,000 (54%)**	**81,000 (69%)**

Source: Growth Plan, Schedule 3

The MCR includes a review of Provincial policies and plans, and associated technical studies to support the updated Official Plan policies, on the following matters:

- refinements to the Provincial natural heritage system mapping;
- refinements to the Provincial agricultural system mapping;
- growth management, including a land needs assessment;
- planning for employment;
- climate change; and
- watershed planning.

The MCR is being closely co-ordinated with the lower-tier municipalities. Lower-tier municipalities will continue to play a key role in identifying appropriate locations for future urban lands and impacts on the agricultural system, natural heritage system, watersheds, and infrastructure requirements.

Throughout the MCR, the County has engaged with a range of stakeholders including the lower-tier municipalities, Indigenous communities, Provincial staff, public agencies, County residents, environmental groups, representatives of the agricultural community, developers, and community associations. The technical studies have been made available to these governments, stakeholders, and the general public for review and comment.

C. LAND NEEDS ASSESSMENT FOLLOWS PROVINCIAL METHODOLOGY

In August 2020, the Growth Plan was amended so that, among other matters:

- The time horizon for municipal land use planning in the Greater Golden Horseshoe was extended from 2041 to 2051.
- Population and employment forecasts contained in Schedule 3 of the Growth Plan, which the County must apply for planning and managing growth through the MCR, were updated and extended to the 2051 time horizon.

At the same time the Province prescribed a new methodology for assessing land needs to 2051 (the "Methodology").[1] Pursuant to Growth Plan Policy 2.2.1.5, the County must use this methodology to assess the amount of land required to accommodate the Schedule 3 forecasts.

The Methodology introduces important changes to the municipal land needs assessment process. These include requirements that housing supply and demand be explicitly analyzed in terms of total housing and housing by type, that market contingency factors be considered in the determination of available land supply, and that "market demand" be considered in determining the demand required to be accommodated in order to achieve Growth Plan policy targets.

Accordingly, this report determines the land needs for the County to accommodate the population and employment forecast to 2051, considering regional and local market trends, the demand for housing, lands required for employment activities, the County's current land supply, and the policy requirements of the Growth Plan.

Land needs are determined for two types of geography as defined in the Land Needs Assessment Methodology:

- **Community Area**, focused around housing and the local retail employment, infrastructure, and services necessary to sustain residential areas. Community areas include Delineated Built-Up Area (BUA) and Designated Greenfield Areas (DGA), as defined by the Growth Plan and the Land Needs Assessment Methodology.

[1] *Land Needs Assessment Methodology for the Greater Golden Horseshoe*, 2020, released in accordance with Growth Plan policy 5.2.2.1 c).

- **Employment Area** – Employment Areas focused around land for the exclusive use of employment activity. In Simcoe County, such land is generally found in business parks and industrial areas. Employment areas must be delineated in the County Official Plan.

D. DATA SOURCES

The growth forecasts and land needs assessment rely on Statistics Canada's 2016 Census, Statistics Canada's *Annual Demographic Estimates* (to 2020), Canadian Mortgage Housing Corporation (CMHC) housing market data, as well as information from the County and lower-tier municipalities from building permits, residential, employment and mixed-use land supply data, and development expectations for areas of growth. The data involved is current up to 2016 (for the Census, with 2021 data only partially available) and up to the end of 2020 (for some municipal data and CMHC housing). The analysis initially adjusts all data and statistics to a common estimated mid-2021 base. The estimated mid-2021 base aligns with the Census that Statistics Canada conducted in May of 2021, which marks the beginning of the forecast period extending for 30 years to 2051.

E. IMPACT OF COVID-19 PANDEMIC

This report was prepared during the COVID-19 pandemic, at a time when much of Ontario appears to have exited the fourth wave of infection and most public health restrictions are being lifted. While unemployment remains higher than before the pandemic, total employment in Ontario returned to pre-pandemic levels in November 2021, with the rebound being slightly faster in the Toronto Census Metropolitan Area and slightly slower in the Barrie Census Metropolitan Area.[2]

The Growth Plan Schedule 3 forecasts used in this report account for impacts of the pandemic on population and employment growth. The forecasts assumed a reduction in growth within the Greater Golden Horseshoe of approximately 110,000 persons in 2020 and 2021, down to about one-third of the expectation before the pandemic. They also assumed a 15% decline in total employment in Q2 2020 with three-quarters of those losses returning by May 2021 and the remainder by sometime in 2022. The May 2021 prediction was quite

[2] The Toronto Census Metropolitan Area includes the Towns of Bradford-West-Gwillimbury and New Tecumseth. The Barrie Census Metropolitan Area includes the Town of Innisfil and Township of Springwater. Equivalent data for the rest of Simcoe County are unavailable.

close, but growth since May has put the economy ahead of the 2020 expectations. Additional information on the impacts of the COVID-19 pandemic and the Schedule 3 forecasts are presented in the *Greater Golden Horseshoe: Growth Forecast to 2051* report prepared by Hemson Consulting for the Ministry of Municipal Affairs and Housing.[3]

Importantly for the purposes of Growth Plan forecasts overall, the federal government increased the 2022 total immigration target to more than 400,000 people, the highest level since 1912 and far higher than the assumptions embedded within the current Schedule 3 forecasts. It is therefore reasonable to expect that population and employment growth in the Greater Golden Horseshoe will be back on the forecast trajectory after the pandemic setback within a few short years. Indeed, initial results from the 2021 Census suggest that growth in Simcoe County is proceeding slightly faster than anticipated by the Growth Plan (see Section 2 for more discussion).

Some of the long-term impacts of COVID-19 are not yet clear, especially concerning the location of employment and the degree of working from home in the future. In the absence of a clear direction, for the purposes of this report, it is assumed that the pandemic will not affect growth and associated land needs in Simcoe County beyond the assumptions incorporated into the Growth Plan Schedule 3 forecasts.

F. INFRASTRUCTURE CAPACITY TO SUPPORT GROWTH

The County is currently undertaking a high level assessment of the existing spare water and wastewater system capacity, planned expansions and upgrades, and ability of systems and receiving bodies in key growth areas to service the growth forecasts set out in this report.[4] The assessment is intended to inform the MCR process and identify potential capacity constraints, including “ultimate” constraints considering technological and environment constraints for each lower-tier municipality. The results of the assessment will inform discussions about the feasibility and appropriate location of settlement area boundary expansions as part of the next phase of the MCR. More detailed reviews of servicing options, financial plans, and County and local Official Plan policies for staging and phasing of development may also be required in order to address infrastructure needs.

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[3] https://www.hemson.com/wp-content/uploads/2020/08/HEMSON-GGH-Growth-Outlook-Report-26Aug20.pdf

[4] To be released as *Simcoe W&WW Service Delivery Review, Technical Memorandum: Municipal Comprehensive Review (MCR) Water and Wastewater Serviceability Review*, prepared by RVA.

The report is divided into six sections. After this introduction, Section 2 describes historical growth trends and the pattern of settlement in Simcoe. Section 3 sets out the framework for assessing future land needs in the County, including the rationale for dividing the County into two regional market areas. Community area and employment area land needs are determined in Sections 4 and 5. Section 6 includes a summary of the land needs and conclusions.

2. Historical Growth And Patterns Of Settlement In Simcoe

Simcoe County is a complicated place to do regional planning. It is far larger than any other County or Region in the Greater Golden Horseshoe and has the second most lower-tier municipalities among Ontario Counties. The growth dynamics are complex, the growth pressures are substantial, the economy is diverse, and so is the settlement pattern. The County surrounds two fast-growing separated cities of Barrie and Orillia, but there is little opportunity to co-ordinate growth planning. It is therefore not surprising that the Simcoe Sub-Area has its own growth management policies in the Growth Plan.

Given these complexities, an understanding of the historical growth trends and patterns of settlement in the County is required in forecasting the distribution of future growth and assessing land needs.

A. SIMCOE'S POPULATION IS GROWING RAPIDLY

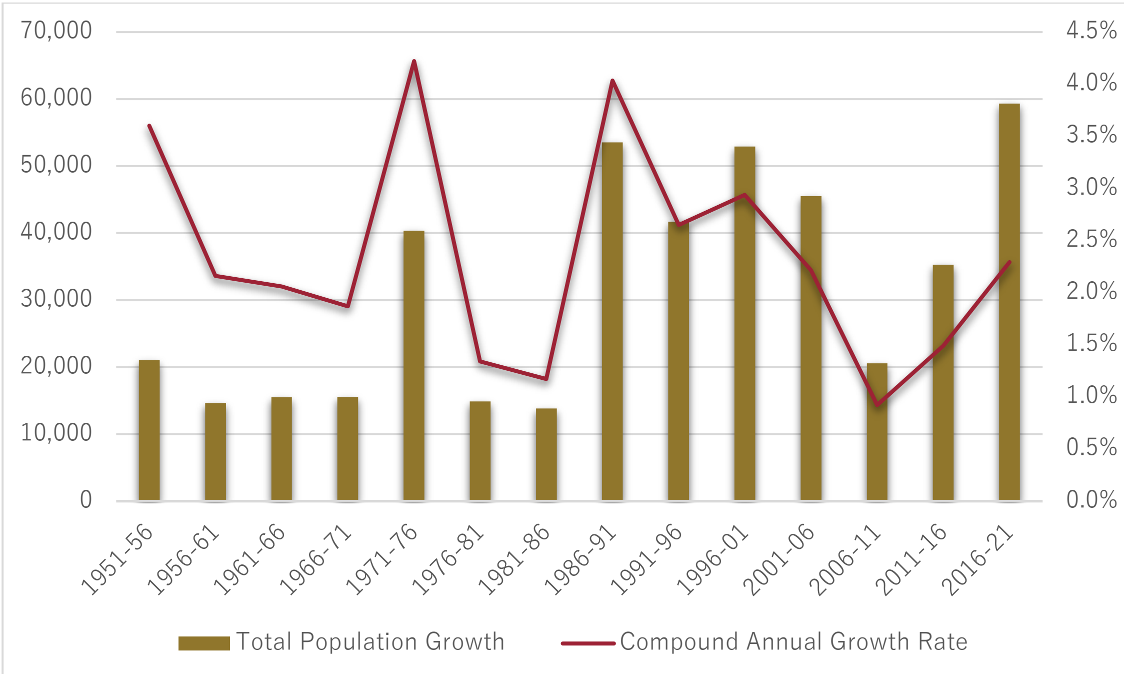
Population growth drives the demand for housing and, in turn, the need for Community Area land. The County's population has been growing rapidly for some time, though at varying rates and not equally across the jurisdiction. Growth in the Simcoe Census Division[5] between the 1950s and 1980s was steady at about 3,000 to 4,000 people per year (see Figure 2). In the late 1980s and early 1990s, as the County became the location of intense development pressure, population growth increased to almost 10,000 people per year—a faster rate of growth than the Greater Toronto Area at the time. By 2005, Simcoe's population was greater than the population of each of the Regions of Halton, Peel, York, and Durham when those regional municipalities were created in the 1970s. By 2021, one quarter of all occupied housing in Simcoe had been built in the previous 20 years.

Like most municipal jurisdictions in Ontario the County's population growth slowed during and immediately after the 2008-2009 recession. Growth has since recovered, with the most population growth in the County's recent history occurring in the five year period between

[5] The Simcoe Census Division is the geographic area covering Simcoe County and the Cities of Barrie and Orillia. It is almost equivalent to the Simcoe Sub-Area but includes the First Nations reserves of Christian Island 30 and 30A and Mnjikaning First Nation (Rama First Nation).

2016 and 2021. This rapid growth has continued through the COVID-19 pandemic period which started with the initial stay at home orders and business closures in March 2020.

Figure 2 – Population Growth, Simcoe Census Division, 1951-2021



Source: Statistics Canada, Census of Canada 1951-2021

Between 1996 and 2006 most population growth in the Simcoe Census Division was accommodated in the City of Barrie; this was at the time when Barrie was the fastest growing municipality in the country (see Figure 3). Barrie's share of regional growth slowed considerably during the recessionary years in large part because it ran out of designated greenfield area for new housing. As a result, between 2007 and 2018 the share of population growth in the Census Division shifted towards the County, which had ample designated greenfield area to accommodate the high demand for new housing.

Barrie's constrained supply of urban land has been relieved over the last decade through the annexation, planning, and servicing of additional designated greenfield area at its southern boundary.[6] The availability of these lands for development, together with its continuing role as the "central city" in the Simcoe Sub-Area, has lead to Barrie accommodating an increased share of population growth in the Simcoe Sub-Area in recent years. This re-orientation of regional growth towards Barrie is forecast to continue in the near-term.

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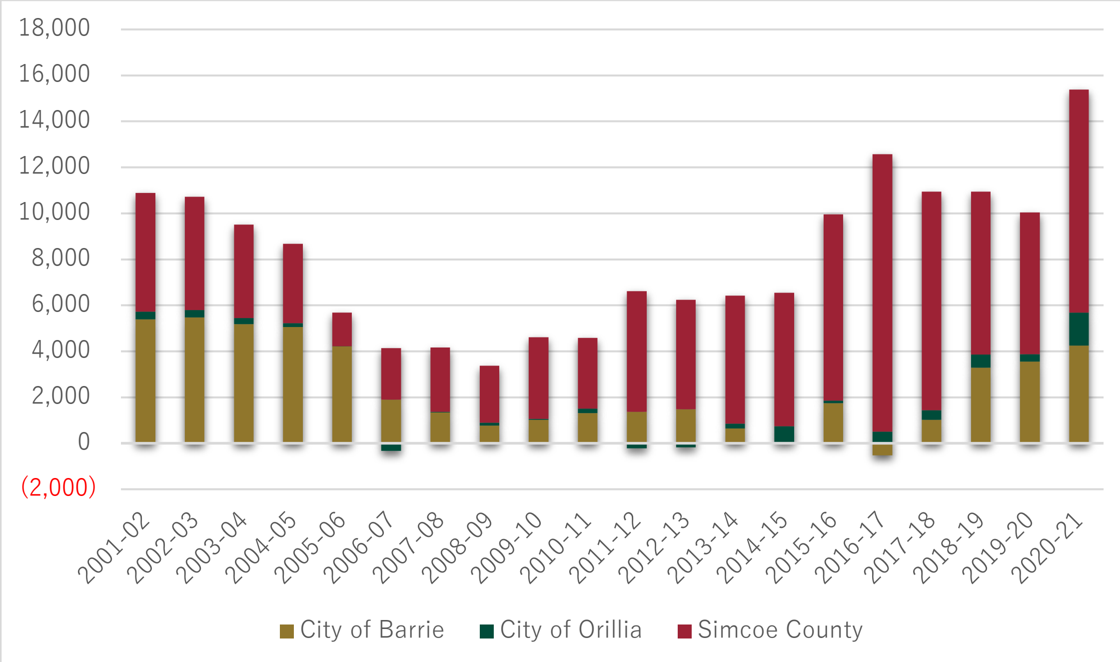
[6] The City annexed 2,300 hectares of land in 2010 and had approved the Salem and Hewitts Secondary Plans by 2014.

Figure 3 – Population Growth in Simcoe Census Division Since 2001-02



Source: Statistics Canada, Annual Demographic Statistics

The high population growth in the County since 2016 is not a phenomenon that is unique to Simcoe. Similar rapid growth has been experienced in Regions and Counties situated on the fringes of the fast-growing metropolitan areas of the Greater Golden Horseshoe, even in predominantly rural and agricultural communities areas with little experience of growth such as the Counties of Brant, Bruce, Grey, Hastings, and Northumberland (see Figure 4). Although the factors driving this growth vary somewhat by location, there are common features across the region:

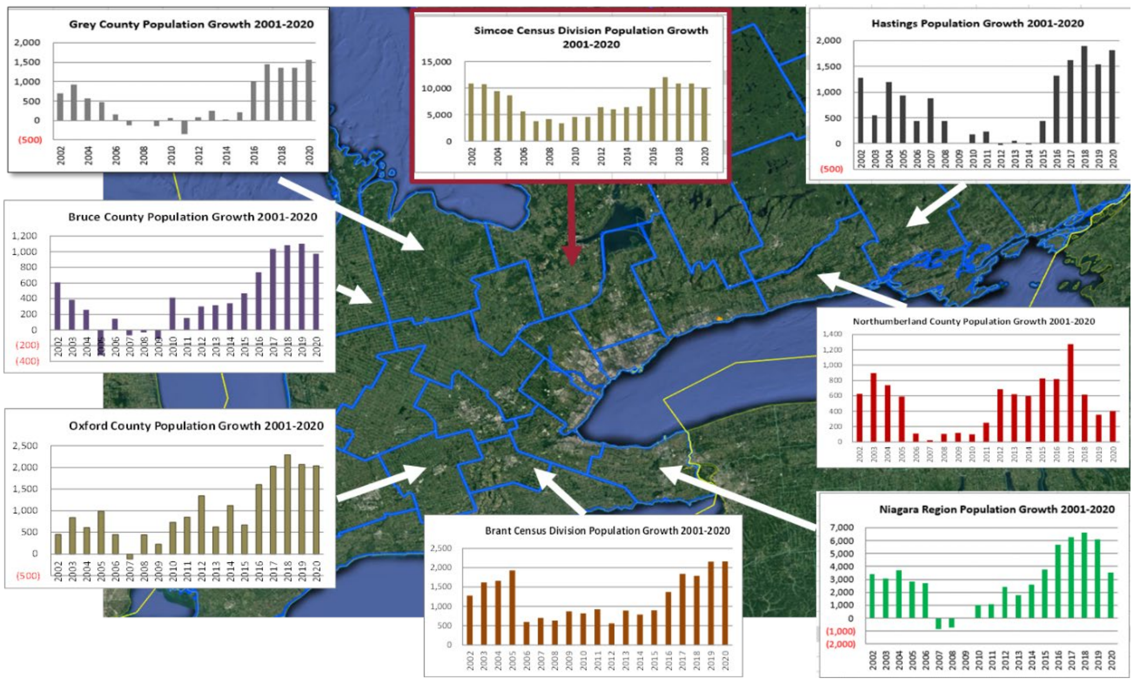
- The age structure of the population: the peak age of the Millennial generation just turned 31, the age at which many are forming households, having their first child, and purchasing their first home. This has led to a rise in the number of homebuyers.
- Housing affordability, which is driving younger first-time homebuyers to seek housing outside major urban centres though still within a reasonable commuting distance of their place of work.
- The movement of people willing/able to relocate from more densely populated areas on a temporary or permanent basis. In Simcoe, there is evidence of second homes being increasingly converted to permanent use, particularly in communities like Collingwood, Wasaga Beach, Midland, Penetanguishene, Tiny, and Tay. The

effects of COVID-19, including the possibility of working remotely, is likely a more recent driver of this trend.

- The increased migration to the Outer Ring from the Greater Toronto Area, accelerated by the pandemic, of early retirees among a Baby Boom generation whose peak age is now 61.

These trends are discussed in more detail below.

Figure 4 – Population Growth at the Edge of the GGH Since 2002



Source: Statistics Canada, Annual Demographic Statistics

i. Most Population Growth in Simcoe is in the South

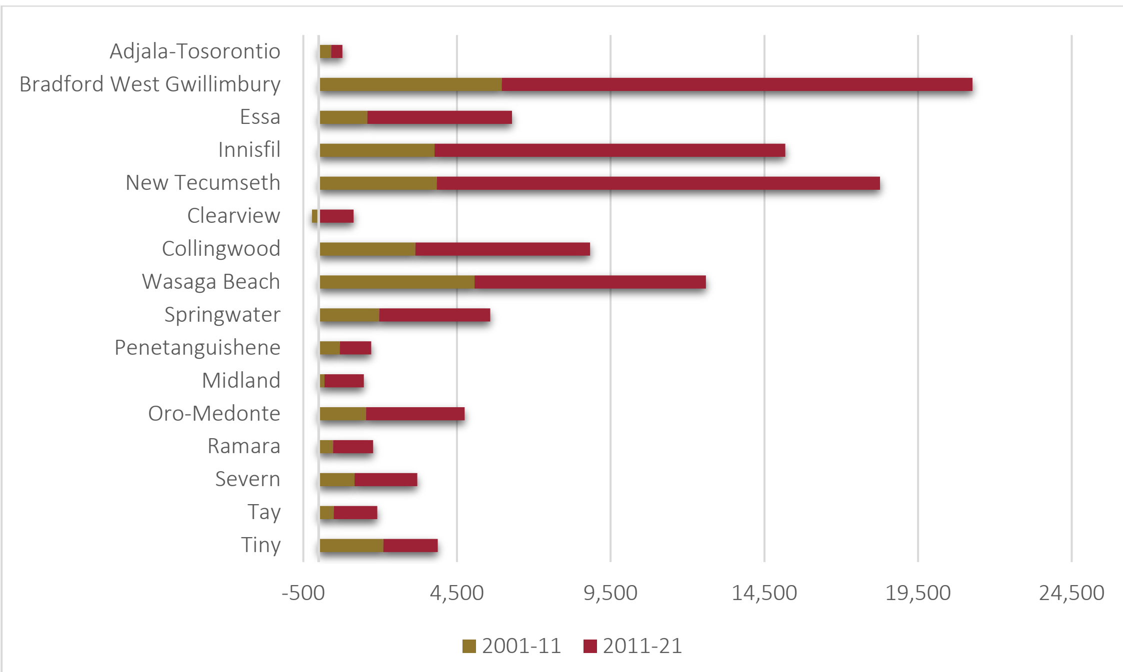
Although the recent population growth spike has occurred in most parts of the County, it is most evident in established urban centres and in the lower-tier municipalities in the southern part of the County (see Figure 5). Very generally, municipalities situated to the south of County Road 90 extending west of Barrie have grown at a much faster rate than municipalities in the "northern" part of the County:

- Over the last 20 years, growth has been increasingly concentrated in Bradford West Gwillimbury, Innisfil, New Tecumseth, and Essa. These municipalities accounted for 60% of growth between 2011 and 2021, up from 46% between 2001 and 2011. They contain well-established urban centres such as Bradford, Alcona, Alliston, and Angus that offer easy access to the County's major employers—notably the Honda plant in Alliston and Canadian Forces Base Borden—as well as jobs in Barrie and the Greater Toronto Area via Highway 400.

- Collingwood and Wasaga Beach are the fastest growing communities in the northern part of Simcoe. Recent development in the settlement areas of Centre Vespra and Snow Valley, to the immediate north of Barrie, has led to rapid growth in Springwater in recent years.

- All lower-tier municipalities are currently growing, even those that are primarily rural such as Adjala-Tosorontio, Severn, Tiny, and Tay, and those such as Clearview, Midland, and Penetanguishene that have experienced population decline at times during the last 20 years.

Figure 5 – Population Growth by Lower-Tier Municipality 2001-2021



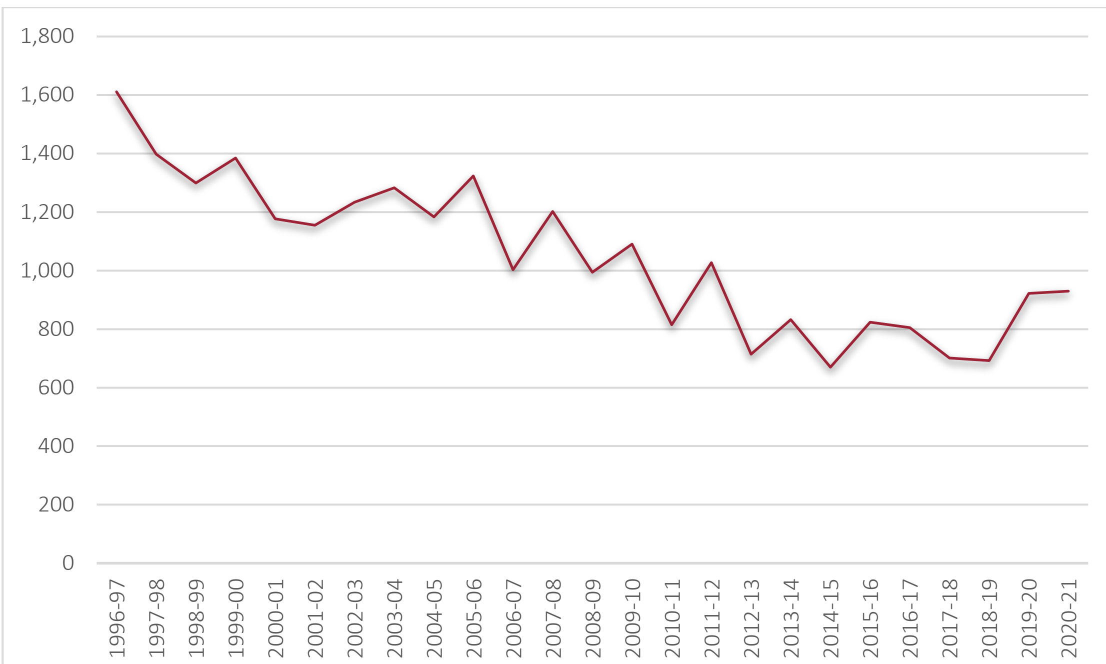
Source: Statistics Canada, Census of Canada 2001-2021

ii. Migration from the GTA Drives Growth in Simcoe

Population change results from two processes: natural increase (births less deaths) and net migration. In Simcoe County, the main driver of growth is in-migration from the Greater Toronto Area.

The population forecasts in this report are developed using a demographic model that projects future births and deaths by age based on historical trends. Recent data indicates that fertility rates in Ontario are declining and life expectancy continues to increase. This means that population growth in the Simcoe Census Division is less and less driven by the natural increase of the people living there (see Figure 6). Longer life expectancy also contributes to an aging of the overall population for the area. An aging population is not unique to the Simcoe Census Division and, like most parts of Ontario, this phenomenon will continue throughout the forecast period to 2051.

Figure 6 – Natural Increase in the Simcoe Census Division 1996/97 to 2020/21



Source: Ontario Ministry of Finance, *Ontario Population Projections, 2018-2046* (2019)

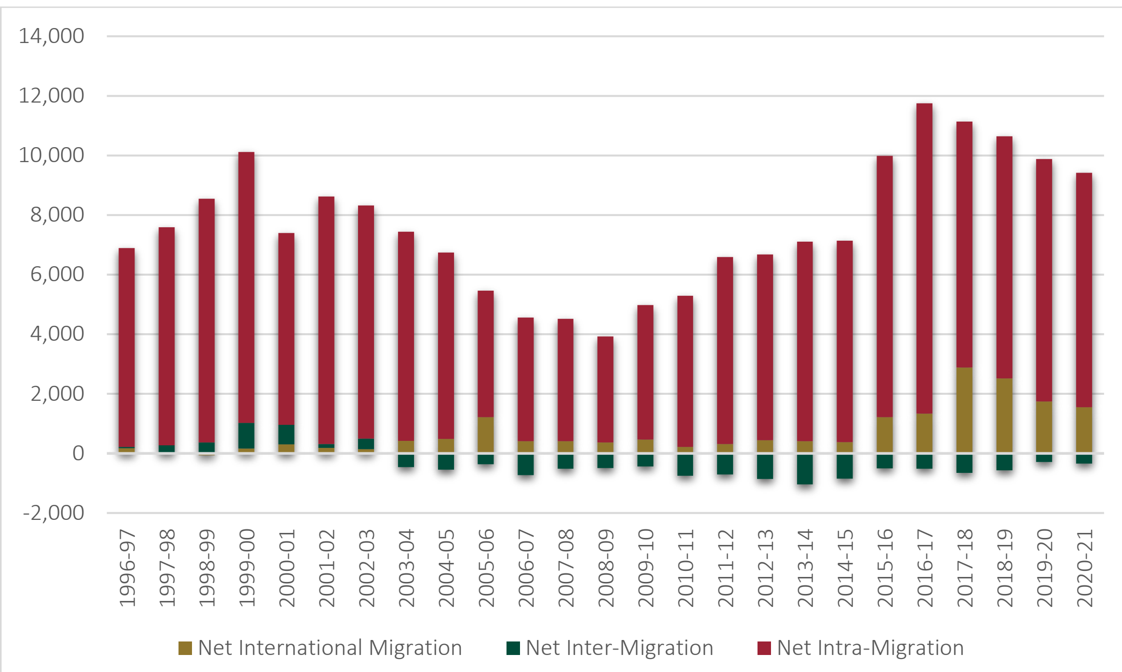
Migration is a key component of the County forecasts as more than 90% of all population growth in Simcoe arises from migration. With the aging of the population, migration will be increasingly important to the County's growth prospects. Figure 7 illustrates the historical migration in the Simcoe Census Division. The graph shows that:

- Migration from other countries (net international migration) and other provinces (net inter-provincial migration) has historically comprised only a small share of overall in-migration.

- The increase in net international migration that has taken place since 2015 is attributable to growth in non-permanent residents, mostly international students and their families who have settled under Canada's new "Express Entry" immigration process, which offers an easier pathway to employment and permanent residency after graduation. In the Simcoe Census Division, the vast majority of these international students live and study in Barrie and Orillia, where campuses of Georgian College and Lakehead University and other institutions of higher education are located. The number of non-permanent residents in the County remains low and this is assumed to remain the case over the forecast period to 2051.

- Most in-migration to the Census Division over the last 25 years has come from intra-provincial movements from other parts of Ontario, mainly the Greater Toronto Area. This pattern is anticipated to continue to 2051.

Figure 7 – Net Migration in the Simcoe Census Division 1996/97 to 2020/21



Source: Ontario Ministry of Finance, *Ontario Population Projections, 2018-2046* (2019)

The migration pattern set out in Figure 7 is indicative of what the County can expect over the long-term. As such, the growth forecasts are based on steady and sustained intra-provincial migration and limited inter-provincial migration and immigration.

B. HOUSEHOLDS AND HOUSING

Planning for Community Area is essentially planning for land for housing. The amount and type of housing needed in Simcoe is strongly related to the population age structure; an older population forms more households than a younger population. The County's labour force is also closely tied to age structure as the primary determinant of the size and availability of labour is the size of the working age population between about 20 and 65 years of age.

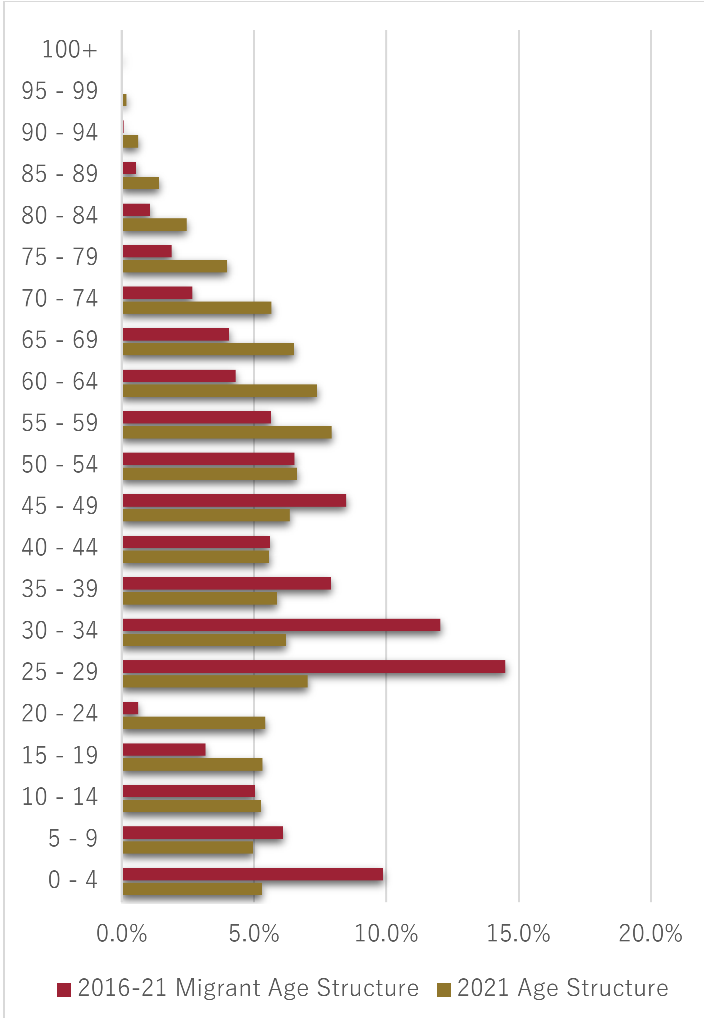
i. Population Age Structure

Figure 8 compares the age structure of Simcoe County population in 2021 with the age structure of in-migrants between 2016 and 2021. The dominant age groups in the overall population are the Baby Boom generation, generally born 1946-1966 and now in their 50s to 70s, and younger members of the Millennial generation, generally born 1981-1996. The former include migrants to the County that fuelled the rapid population growth of the 1980s and 90s (see Figure 2).

Of the people who have settled in Simcoe recently:

- the age profile is generally much younger than the overall population;
- a significant portion are Millennials in their late 20s and early 30s, who are forming new households and purchasing their first home with young children;
- a significant number of migrants are between their late 40s and early 60s. This group ranges from people in their peak earning years to those taking early retirement; and
- there is considerable out-migration of young adults in their late teens and early 20s seeking job training, post-secondary education, and employment in larger urban centres.

Figure 8: Simcoe County Population Age Structure



Source: Hemson Consulting, based on Statistics Canada Census data

The age profile of in-migrants to the County is not anticipated to change dramatically over the next 30 years. However, by 2051 the County's population will be older than it is today, with the share of the population aged 65 and older being forecast to rise from 21% in 2021 to 24% in 2051. The County's labour force will also be smaller in relation to the population, with the population of working age (15-65) falling from 65% to 60% over the 30 year forecast period.

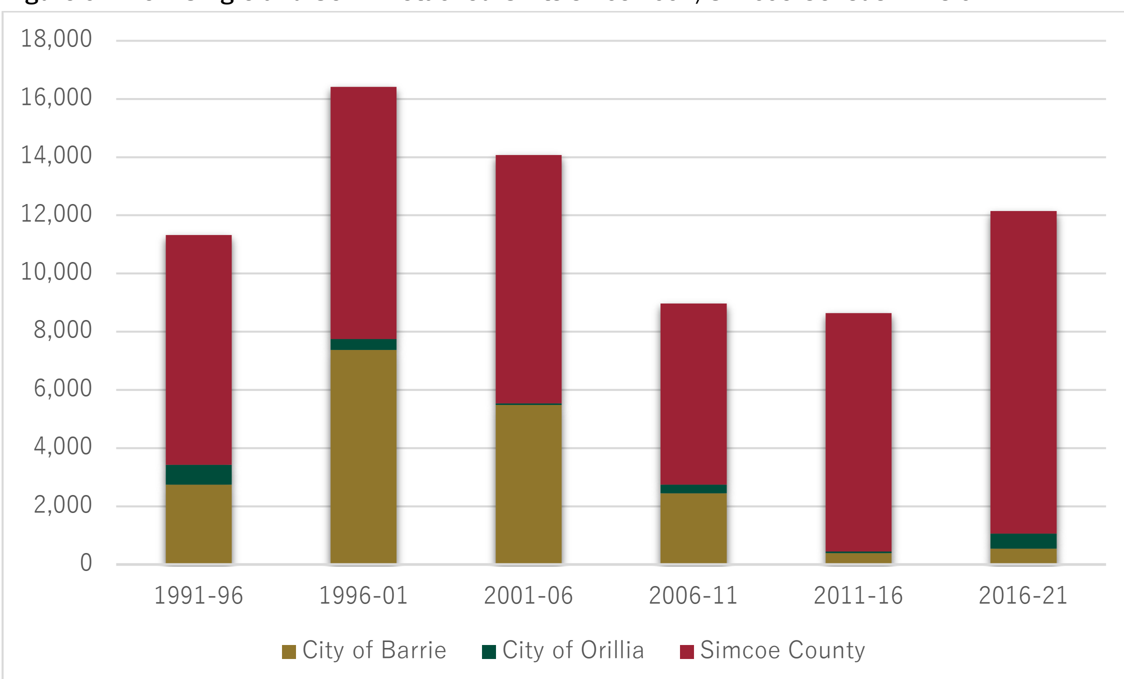
ii. Type and Location of New Housing

The distribution of housing growth in Simcoe County generally mirrors population growth. New housing is concentrated in established urban centres and increasingly in the lower-tier municipalities in the southern part of the County—58% of all new housing over the last five years was constructed south of County Road 90, up from 55% between 2011 and 2015 and 42% between 2006 and 2010..

Figures 9 to 12 show the housing growth by unit type in the Simcoe Census Division since 1991. The overwhelming housing preference in the County over the last 30 years has been for single detached homes. Moreover, the number of new single detached homes has increased in recent years in Simcoe, in part due to designated greenfield area land constraints in Barrie (see Figure 9).

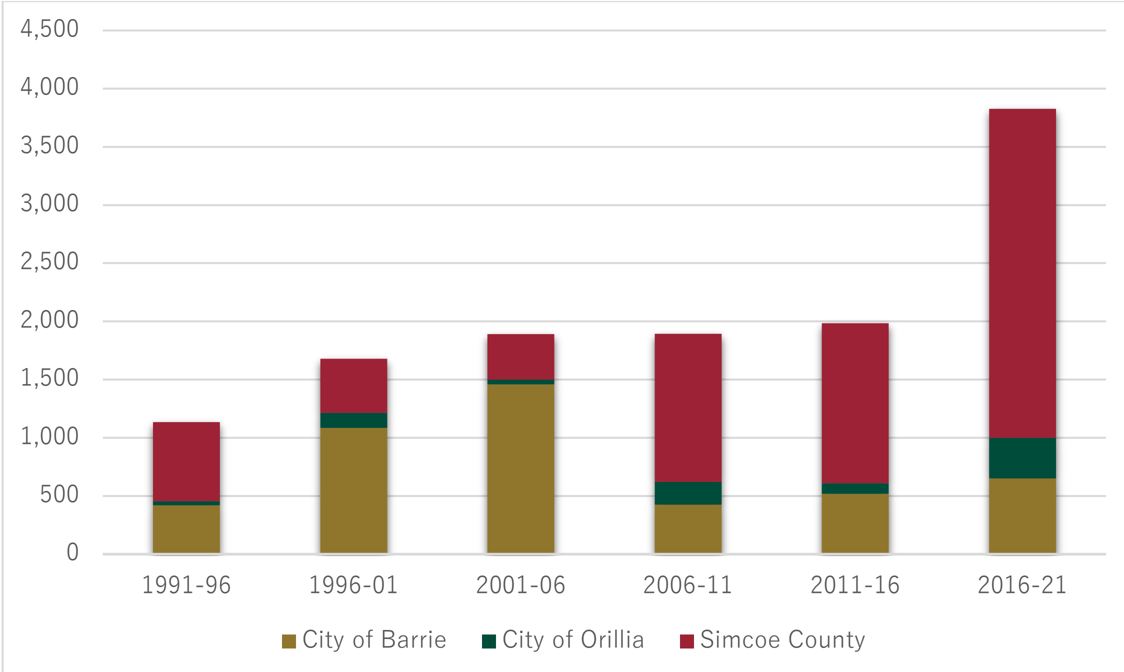
The prevalence of new rowhouses and apartments in the County is much lower than that of single detached units, though these medium and higher density housing types are increasingly being constructed in Simcoe (see Figures 10 and 11). Barrie and Orillia have experienced relatively strong apartment construction in the context of the Census Division for many years.

Figure 9 – New Single and Semi-Detached Units since 1991, Simcoe Census Division



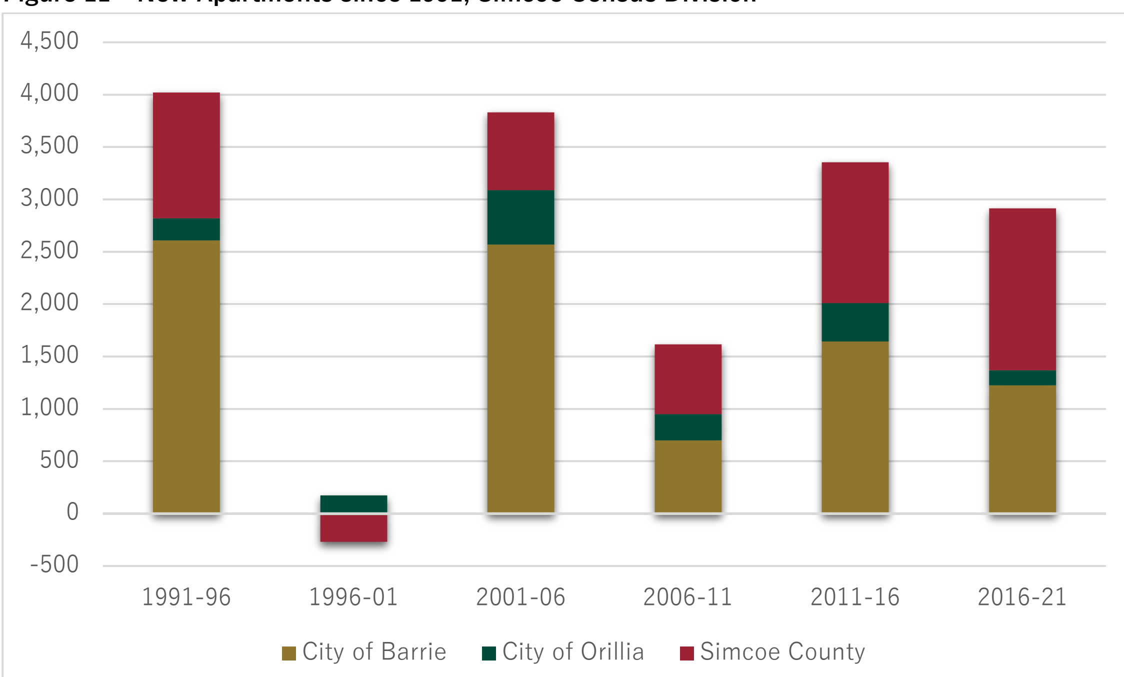
Source: Hemson Consulting, based on Statistics Canada Census data

Figure 10 – **New Rowhouses since 1991, Simcoe Census Division**



Source: Hemson Consulting, based on Statistics Canada Census data

Figure 11 – **New Apartments since 1991, Simcoe Census Division**



Source: Hemson Consulting, based on Statistics Canada Census data

iii. Planning for Higher Density Housing

The County will need to ensure that it can provide suitable housing to meet the age profile of future in-migrants. The preference of new homebuyers in the short and medium-term is anticipated to continue to be for single detached “family” homes. This housing form remains more affordable in Simcoe than in the Greater Toronto Area (see Table 2) and very attractive for households with children wishing to commute to jobs in Barrie and the GTA. However, due to demographic changes, housing affordability trends, the economic development of Simcoe, the changing nature of employment, and Provincial and local land use planning policies, the County will need to plan for a more diverse range and mix of housing over the longer-term.

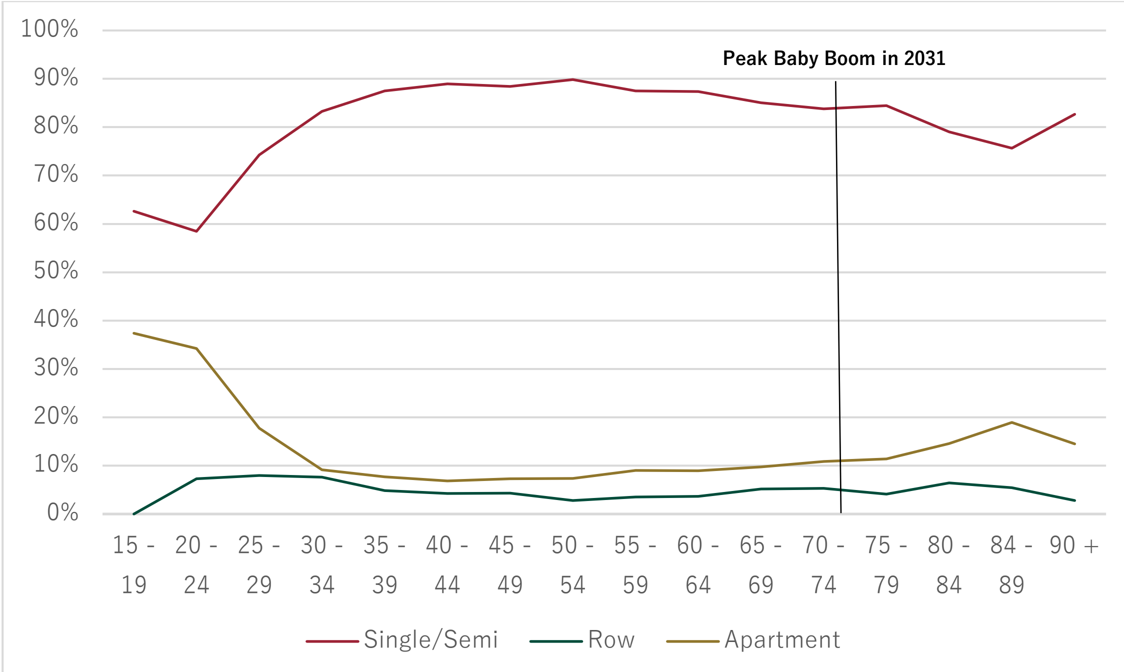
a) Demographic Change

Figure 12 below shows housing occupancy patterns in Simcoe County in 2016 by age of household head. It demonstrates how housing preferences follow life cycle patterns. Households of all ages predominantly occupy single detached dwellings. Rental apartments are the preferred form for a significant number of households in their 20s. The occupancy of apartments, whether owned or rented, starts to increase again as people age. Rowhouses, which have played a significant role in providing homes for new homebuyers elsewhere in the Greater Golden Horseshoe in recent years, currently represents a very small segment of the Simcoe housing market.

These data suggest that:

- older adult households in Simcoe tend to remain in their single detached homes longer than in more urbanized communities;
- many older adults that do downsize to an apartment often leave the County in doing so, likely to Barrie, Orillia, and the Greater Toronto Area where there is a broader range of housing options and services; and that
- the range and mix of the existing housing stock, particularly in larger settlement areas such as Alcona, Alliston, Bradford, Collingwood, and Wasaga Beach, is somewhat limited.

Figure 12 – Simcoe County Housing Occupancy Patterns 2016 Census



Source: Hemson Consulting, based on Statistics Canada, 2016 Census

Figure 12 also shows that from 2031 onwards, the largest age cohorts in the Simcoe population will be reaching the age when apartment housing becomes a desirable alternative to living in a single detached home. In order for people to be able to "age in place", that is continue to live in their community as they become older, a greater number of higher density housing forms, particularly apartments for older adults wishing to downsize as well as the full range of independent and assisted housing options for seniors, will need to be available throughout the County.

As well as demographic changes, other factors will drive the need for the County to plan for higher density housing forms.

b) Affordability

The high price of housing generally is a limiting factor on the ability of households, particularly Millennial households, to purchase single detached homes. As a result, affordability concerns in the Greater Toronto Area have led to shifts in housing demand towards higher density built forms. Affordability is also a key contributing factor driving out-migration from the Greater Toronto Area to Simcoe.

At the same time, Simcoe has not been immune to rising house prices. The average sale price of a single-detached dwelling increased by 113% and 87% in the Toronto and Barrie Census Metropolitan Areas respectively over the last decade, with prices in Bradford West

Gwillimbury, New Tecumseth, and Springwater increasing faster than the Barrie CMA average (see Table 2).

Table 2 – Change in Single-Family Home Average Sale Price for Select Municipalities ($)

	2011	2021	Difference	Difference (%)
Toronto CMA	*658,000*	*1,431,000*	*759,000*	*113%*
Bradford West Gwillimbury	430,000	858,000	430,000	100%
New Tecumseth	321,000	756,000	437,000	137%
Barrie CMA	*417,000*	*798,000*	*372,000*	*87%*
Springwater	517,000	945,000	448,000	90%
Innisfil	435,000	755,000	323,000	75%

Source: CMHC

The problem of affordability has been exacerbated in the County because household incomes have not kept pace with rising house prices. Between 2001 and 2016 average household income in Simcoe rose by 42%, from $53,800 to $76,500, well below the increase in house prices shown in Table 2.

Should house prices continue to rise over the coming decades, and rise faster than household incomes, these phenomena could shift housing demand towards higher density housing, and particularly towards semi-detached and row housing that are more affordable for family households. The need for higher density affordable and attainable housing forms for modest and low income groups can also be expected to increase.

c) Pattern of Settlement

The pattern of settlement in Simcoe, including the location of existing and planned major infrastructure, will influence the type of housing that is required in the coming decades. The demand for apartments is typically more concentrated in larger, more mature urban centres with established downtown cores and transit services. Rural and suburban areas generally appeal to households seeking "ground-related" housing.[7] The following factors have been considered in determining the amount, type, and location of higher density housing in the County growth forecasts:

[7] Ground-related housing generally refers to housing that is accessible from the ground. In this report it includes all housing that is not an apartment.

- Access to higher order transit, arising chiefly from investments by Metrolinx in two-way all-day GO transit, particularly the construction of a new GO station in Innisfil, represents a key opportunity to develop more compact, transit-oriented communities in Innisfil and Bradford West Gwillimbury. These investments will more closely integrate these communities with Barrie and the Greater Toronto Area and will broaden the range of land uses near the stations to include office and mixed use development as well as higher density housing.

- In the case of the Innisfil GO Station, a Ministerial Zoning Order (MZO) has recently been made to designate lands on the 6th Line for the Town's future Orbit community. The growth forecasts in this report assume that the lands covered by the Orbit MZO will accommodate 3,850 homes (75% apartments; 25% rowhouses) as well as associated Community Area and major office employment uses.

- Municipalities with larger, well established urban settlements such as Collingwood, Wasaga Beach, Midland, Penetanguishene, Alliston, Alcona, and Bradford are assumed to be able to respond to changing demands for higher densities by planning for higher rates of housing intensification within their delineated built-up areas (BUA). Large urban settlements situated along the Georgian Bay shoreline are particularly well placed to accommodating seasonal dwellings in apartment form in the BUA.

d) Near-Term Market Demand

Figures 9 to 11 demonstrate that while most housing being constructed in Simcoe has historically been single detached units, the market has become more diverse in recent years. Data on active planning applications provided by the County indicate that a shift towards medium and high density development will continue in the coming years, particularly in municipalities located south of County Road 90 and in the County's BUA and designated greenfield areas (DGA) (see Tables 3 and 4).

Table 3 – Housing Mix in Simcoe County Planning Applications by Location

	2016-2021	County Applications	Applications in "South"	Applications in "North"
Singles/Semis	71%	60%	53%	62%
Rowhouses	19%	24%	22%	24%
Apartments	10%	17%	25%	14%
Total	100%	100%	100%	100%

Source: County of Simcoe Planning Department

Table 4 – Housing Mix in Simcoe County Planning Applications by Policy Area

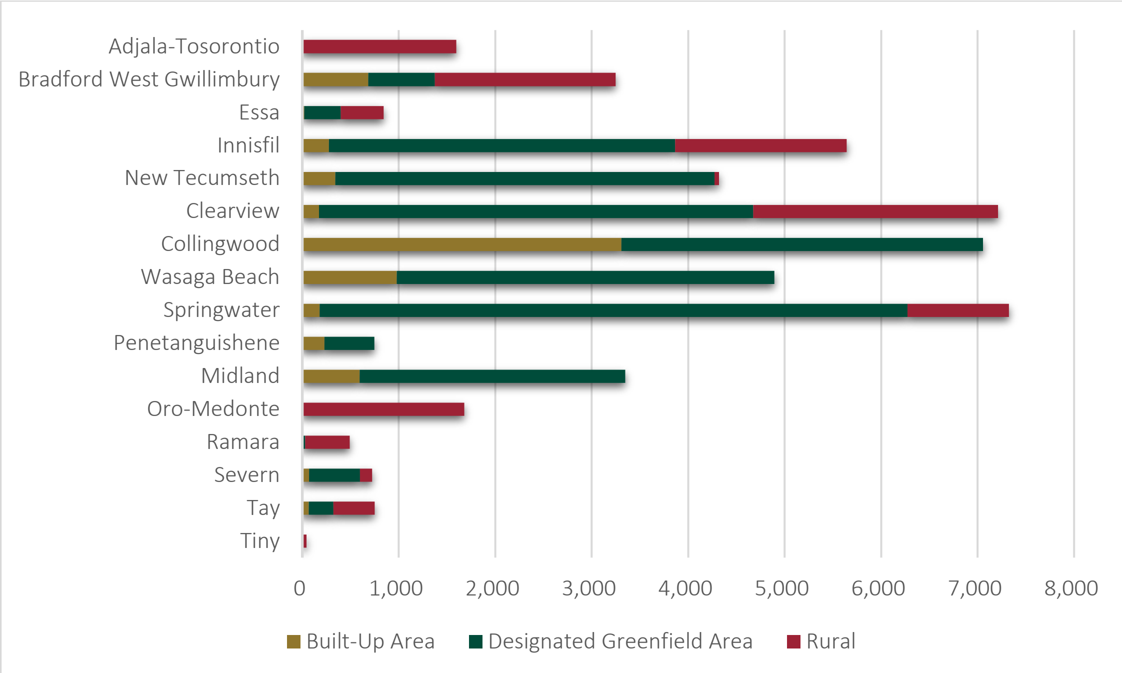
	2016-2021	Applications Within BUA	Applications Within DGA	Applications in Rural Areas
Singles/Semis	71%	27%	50%	88%
Rowhouses	19%	38%	29%	9%
Apartments	10%	35%	21%	3%
Total	100%	100%	100%	100%

Source: County of Simcoe Planning Department

Most units in active planning applications, 58%, are located in designated greenfield areas in municipalities with larger, fast-growing settlement areas (Innisfil, New Tecumseth, Collingwood, Wasaga Beach, and Midland) and municipalities with large approved secondary plans (Springwater, Clearview) (see Figure 13). Applications in the designated greenfield areas in municipalities south of County Road 90 contain a considerably higher share of apartment units than designated greenfield areas in the northern part of the County (35% compared with 15%). Additionally:

- A considerable proportion of units in applications (12%) are located in the BUA across the County, particularly in Collingwood, Wasaga Beach, Bradford West Gwillimbury, and Midland. As with the designated greenfield areas, proposals in the BUA in municipalities south of County Road 90 exhibit a higher proportion of rowhouses and apartments than the BUA in the northern part of the County (84% compared with 71%).
- Although there appears to be considerable development interest in rural areas throughout the County — 29% of all units in active applications, with 88% being single/semi-detached units — many of these developments represent legacy applications that have been in the development process for many years.

Figure 13 – Housing in Planning Applications by Policy Area and Municipality



Source: County of Simcoe Planning Department

C. EMPLOYMENT WILL GROW FASTER THAN POPULATION

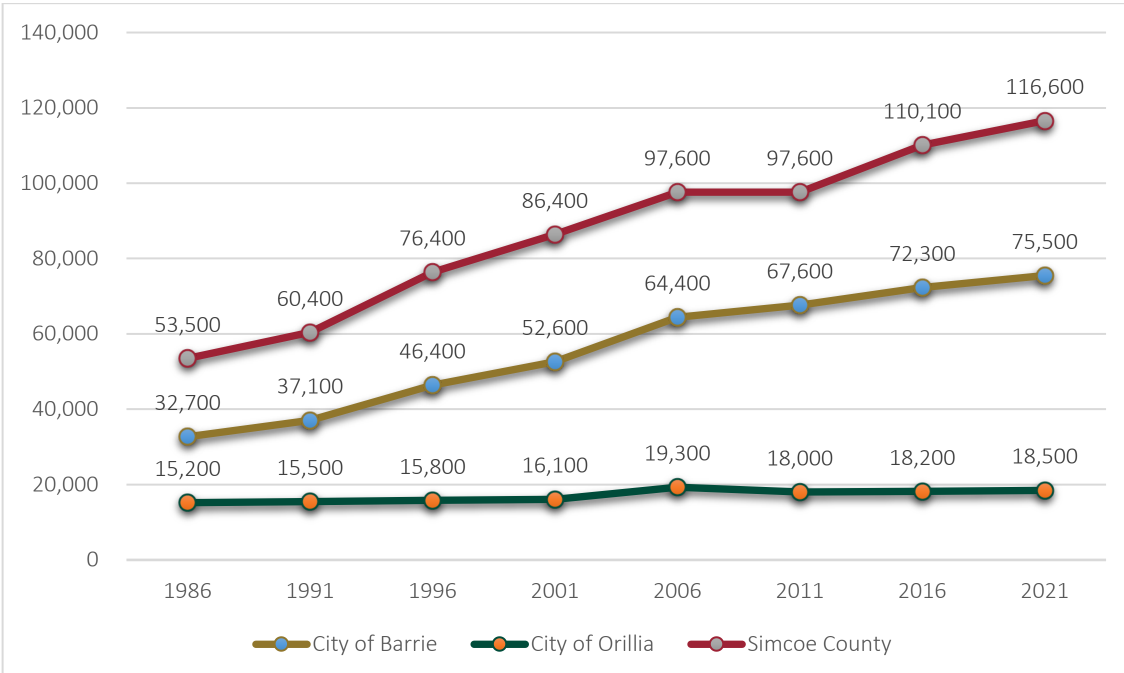
The land needs assessment is not just about planning for population and housing. It is also about planning for land for jobs; land that is well located to maximize employment opportunities and allows Simcoe residents to work close to where they live. It is in part to achieve "complete communities" in Simcoe that the Schedule 3 forecasts are premised on employment in the County growing at a faster rate than population over the next 30 years.

The County is located due north of the economic engine that is the Greater Toronto Area and Hamilton, to which it is connected by Highway 400. Arguably, the 400 is the second most important highway in Ontario, acting as the principle corridor linking Southern Ontario to Northern Ontario and routes to the west. The highway will continue to play an important role connecting people who commute for work in York Region and Barrie and, particularly south of Barrie, as a location for the development of strategic employment lands.

i. County Exhibits Robust Employment Growth

Job growth in the Simcoe Census Division has generally been steady since the mid-1980s, though the local economy is not immune to global and regional economic forces. Like most parts of Ontario, growth in the Census Division slowed during and after the 2008-2009 recession (see Figure 14). However, the recovery from the recession was unusually swift, particularly in Barrie and the County. The current number of jobs in the County ("place of work" employment) is estimated at 116,600, with jobs in Barrie and Orillia estimated at 75,500 and 18,500 respectively. Orillia has yet to return to its peak employment of 19,300 in 2006.

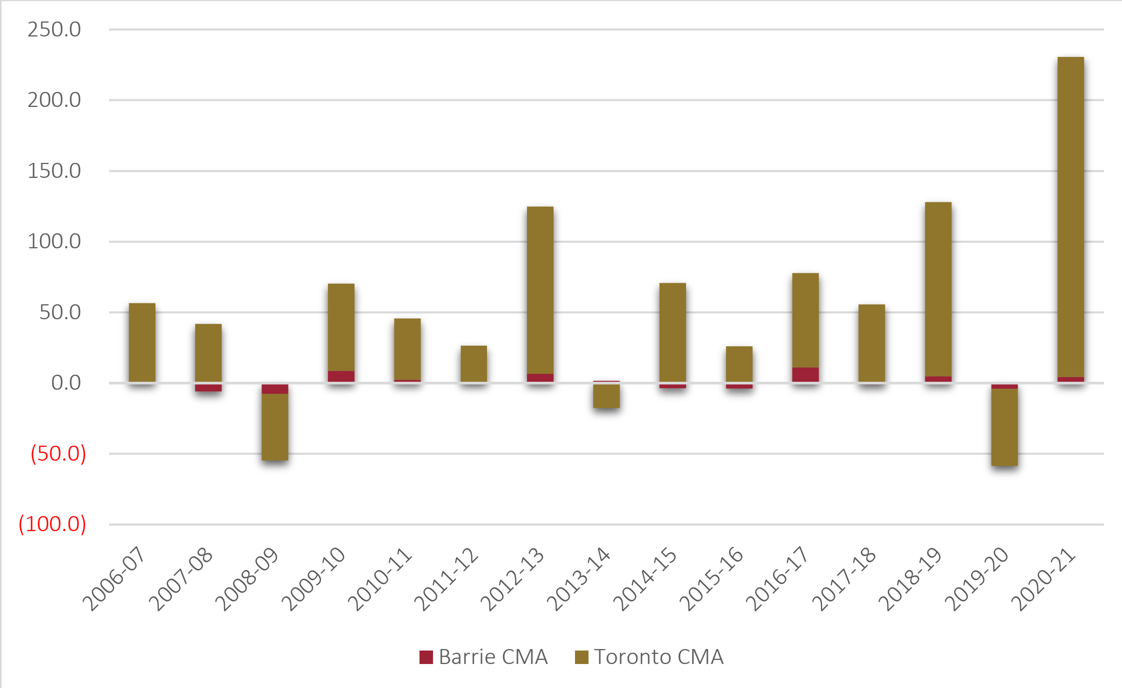
Figure 14 – Place of Work Employment Since 1986, Simcoe Census Division



Source: Statistics Canada, Census of Canada; Hemson projections (for 2021)

COVID-19 was a short sharp economic shock to the local economy. The County lost 10% of its employment base in 2019/20 while employment losses in Barrie and Orillia over the same period were 8% and 7% respectively. That said, while unemployment remains higher than before the pandemic, total employment in Ontario returned to pre-pandemic levels in November 2021, with the rebound being faster in the Toronto Census Metropolitan Area and somewhat slower in the Barrie Census Metropolitan Area (see Figure 15).

Figure 15 – Change in Employed Labour Force, Barrie and Toronto CMAs, 2006/07 to 2020/21



Source: Statistics Canada, Labour Force Survey

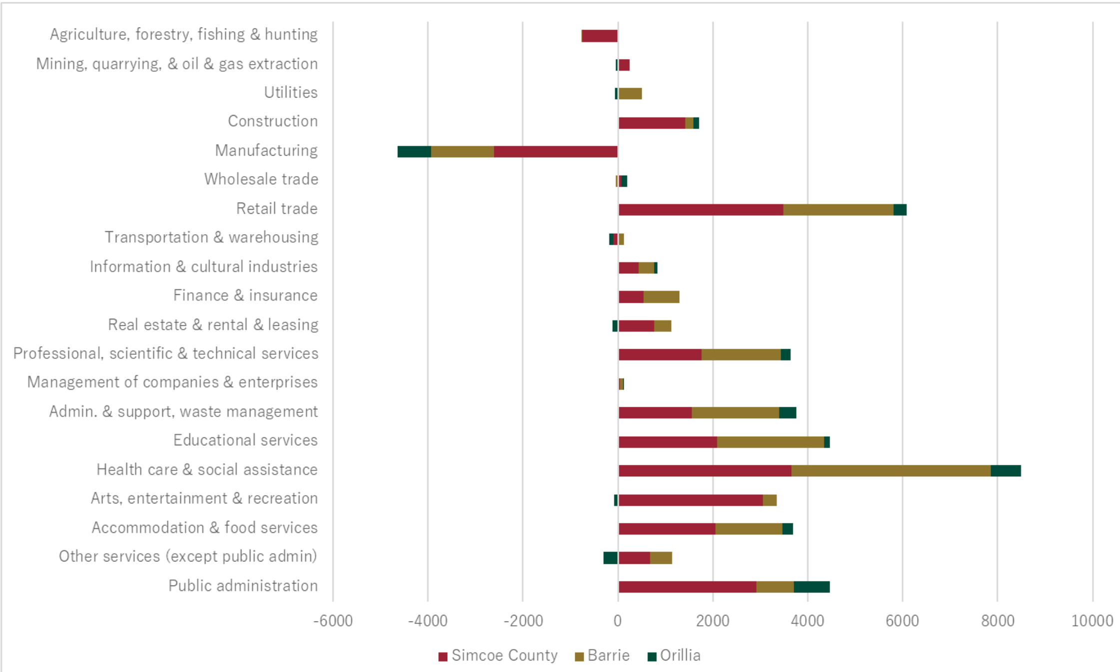
ii. Simcoe Economy is Becoming More Diverse

The County's economy has undergone a long transition from one based mainly on tourism, agriculture, and resource extraction to one that is diverse and increasingly sophisticated. Like most of Ontario, both the number of manufacturing jobs and share of the overall employment base directly involved in manufacturing fell by 2,600, from 18,460 in 2001 to 15,850 in 2016 (see Figure 16). However, the rate of decline in manufacturing of about 1% per year was roughly half the corresponding rate of decline for Ontario as a whole over the 15 year period.

Moreover, jobs lost in Simcoe's manufacturing sector have been replaced in other areas. For example, notwithstanding the role of Barrie and Orillia as regional service centres, there has been strong job growth in the County in the public sector (particularly in health care and social assistance and public administration), arts and cultural activities, and accommodation and food services. As a result of this growth, the Simcoe economy has been increasingly shifting to services (including "knowledge based" and "creative" industries) and population-related functions.

Growth has also occurred in sectors that store or distribute goods or provide support services (such as professional, scientific and technical services, and real estate) along with various population-serving activities such as retail trade. Many of these activities require (or prefer) single storey facilities on large, segregated industrial or business park sites. Such land extensive sites offer easy access to major transportation routes, the opportunity to build large buildings for storing goods and equipment, and the necessary road design for turning and unloading trucks.

Figure 16 – Change in Employment by NAICS Sector 2001-2016



Source: Statistics Canada, Census of Canada

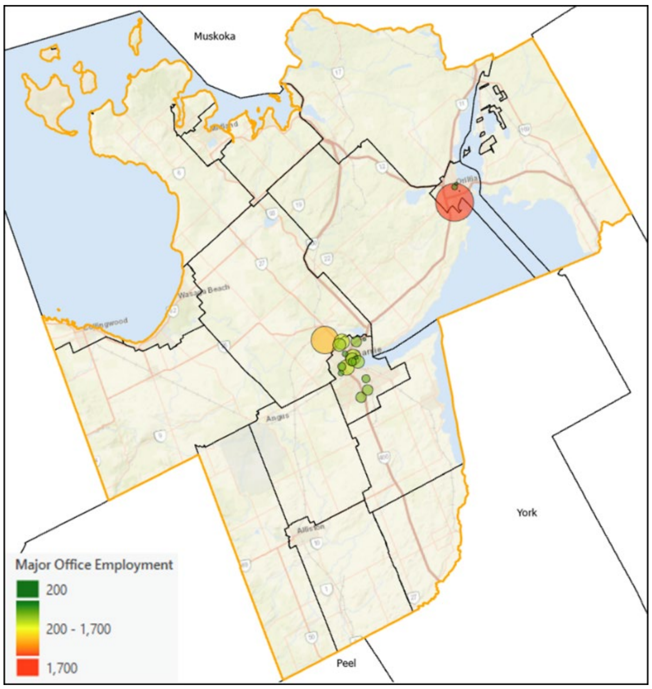
iii. New Jobs Will Follow Population and Well Located Employment Lands

The key data sources for employment generally categorize jobs according to the type of work being undertaken. Employment is organized into sectors which are further broken down using a North American Standard Industry Classification System (NAICS) (see Figure 16). While sectoral data by NAICS coding provides detailed information about the activity and behaviour of the economy, it reveals little about the spatial arrangement of such activity. For land use planning purposes, the land needs associated with employment by sector needs to be understood in order to properly allocate employment to different parts of the County.

This is the reason for structuring the employment growth forecasts around four land use based categories:

- **Major Office Employment**, which refers to office type employment contained within free standing buildings more than 20,000 net square feet (1,858 m^2). This employment includes activities in public administration, information, financial services, real estate, and professional and technical firms that require highway access and, in heavily urbanized areas, access to transit. Both Barrie and Orillia contain major offices concentrations. However, major office jobs account for just 1% of current employment in the County and are located in the County Administration Centre in Springwater (see Figure 17). The forecasts assume that additional major office concentrations will only develop within the Orbit MZO in Innisfil.

Figure 17 – Major Office Employment in Simcoe in 2021



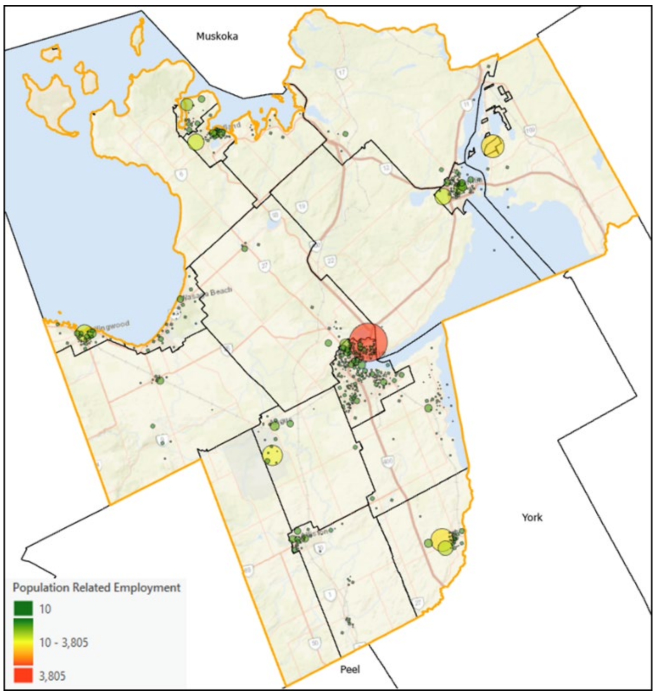
Source: Hemson Consulting

- **Population-Related Employment** is employment that primarily serves local residents (permanent and seasonal). In Simcoe, this category accounts for about 65% of all employment and includes retail, accommodation, food, education, health care, local government and work-at-home jobs.[8] Current

[8] Work-at-home employment describes people that work at home or run a home-based business as their primary job. It does not include workers who might work at home a few days a week, but otherwise have an office or work station elsewhere. Because of the transformation of traditional work at home arrangements during the pandemic, and the way the Census is worded, many people working at home on a temporary basis would likely have reported home as a usual place of work in 2021, while others may not have on the basis that they would be returning to an place of work at some future date.

population related employment in the County is concentrated in commercial centres such as Alliston, Bradford, Angus, Collingwood, Midland, and Penetanguishene as well as large institutions like the Waypoint Centre for Mental Health in Penetanguishene and the Collingwood Hospital (see Figure 18).[9] Future population-related employment will generally follow population growth and associated land needs are included in the calculation of Community Area lands.

Figure 18 – Population Related Employment in Simcoe in 2021



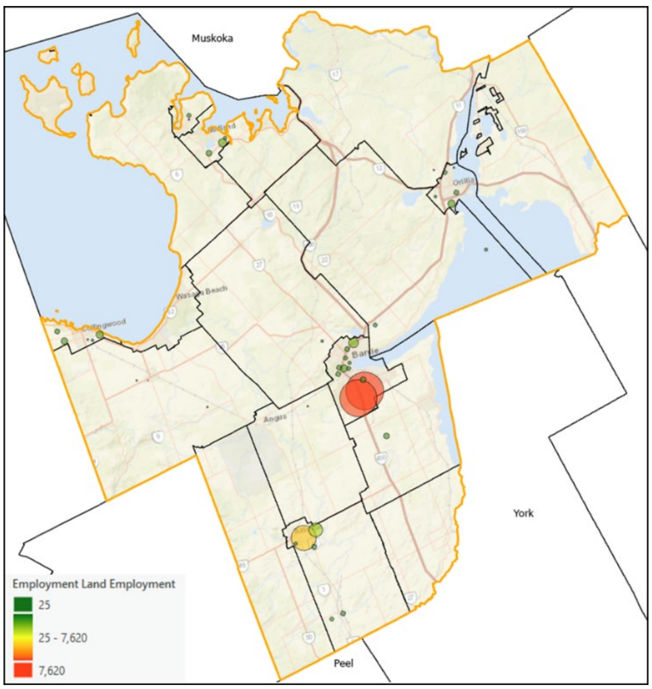
Source: Hemson Consulting

- **Employment Land Employment**, refers to employment accommodated primarily in low-rise industrial-type buildings, the vast majority of which are located within business parks and industrial areas. In Simcoe, this category comprises 23% of the total employment base and includes manufacturing, construction, wholesale trade, transportation, warehousing, and logistics, as well as a range of professional support services. Lands accommodating these activities have very specific locational requirements including access to major highways and markets, proximity to a labour pool, and the ability to develop large land parcels on flat land and to cluster with similar businesses. Currently,

[9] Population-related jobs associated with Casina Rama, though shown in Figure 18, have been excluded from the forecasts in this report as they are situated on the Mnjikaning First Nation 32 (Rama First Nation) reserve.

employment land employment is concentrated in urban business parks in communities such as Midland, Penetanguishene, Collingwood, and New Tecumseth (where the major employer is Honda, in Alliston), though there are large stand-alone industrial uses in rural areas (such as the Decast facility in Utopia) that are included in this category (see Figure 19). Growth in employment land employment will be significant over the next 30 years and will take place in areas with well-situated, vacant employment lands, particularly those adjacent to Highway 400. Land needs for this type of employment are determined in the calculation of Employment Area.

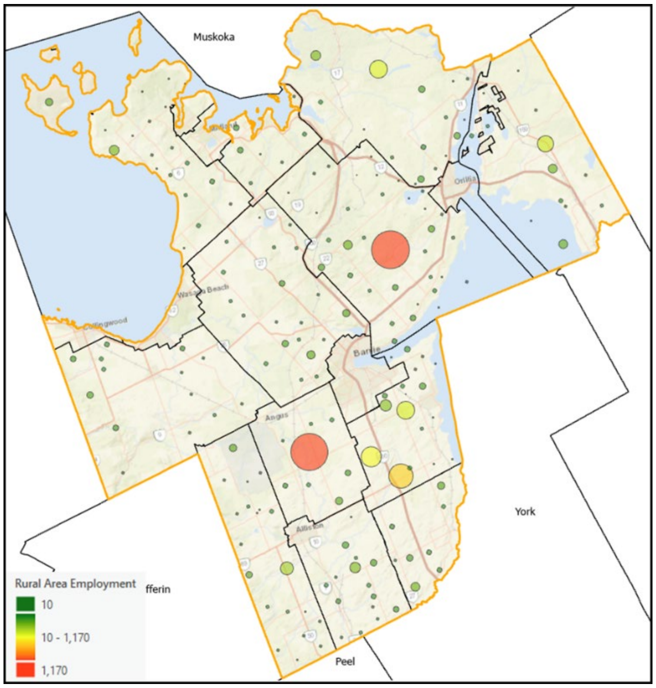
Figure 19 – Employment Land Employment in Simcoe in 2021



Source: Hemson Consulting

- **Rural Employment**, refers to all jobs located in rural areas, including agriculture, aggregates, small scale manufacturing and construction and, particularly in the northern parts of the County, tourism and recreation. These jobs are often located on farms and in scattered retail or service properties and are not on urban land designated and serviced for industrial or commercial use (see Figure 20). Although comprising 25% of the current employment base, growth in rural employment is anticipated to be low over the next 30 years as growth continues to be focussed in urban areas.

Figure 20 – Rural Employment in Simcoe in 2021



Source: Hemson Consulting

iv. Planning for Complete Communities

There is a misconception that Simcoe County is becoming a bedroom community for the Greater Toronto Area. In reality, where people live and work in Simcoe is much more complex and there is a clear distinction between commuting patterns in the southern part of the County and those in communities to the north.

- The area of the County located north of County Road 90 generally exhibits net out-commuting—more people leave the area for work than commute in. Most out-commuting is to Barrie and, to a lesser extent, Orillia.

- In general, the level of out-commuting is higher in those parts of the County that are south of County Road 90, with significant out-commuting to York Region, Toronto, Barrie, and Peel Region.

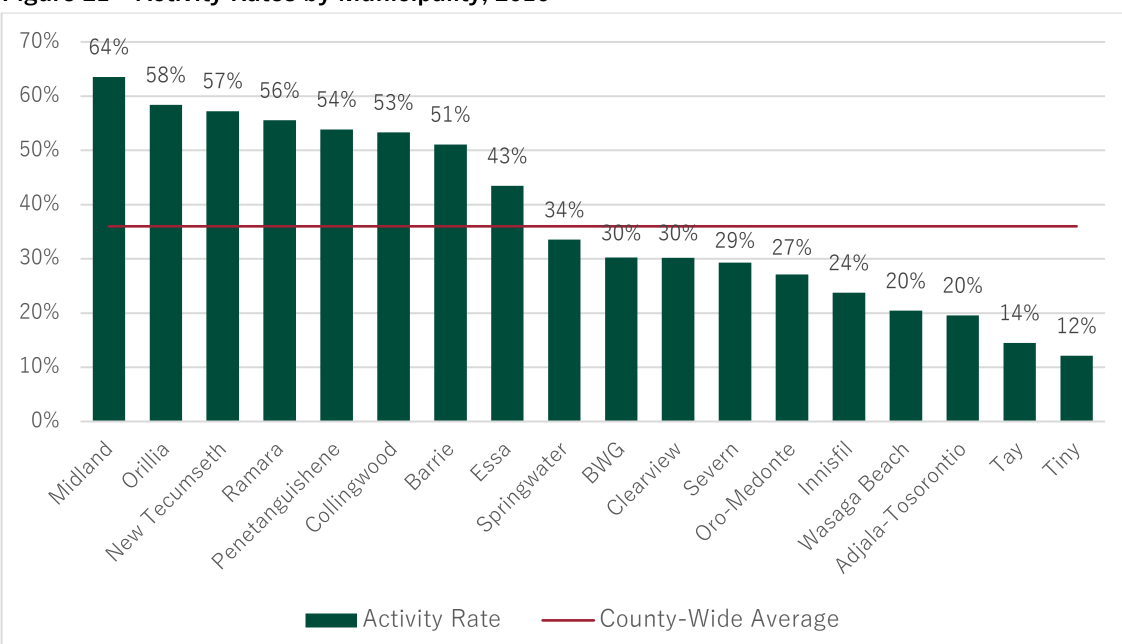
- In Barrie, about the same number of people leave to the south for work as arrive for work in the city from the north.

Overall, there are strong economic pull factors that attract workers in all parts of the County to Barrie and workers in the southern part of the County to the Greater Toronto Area. More detailed analysis of local commuting patterns is provided in Appendix A.

A key objective of the County's MCR is to build "complete communities", that is communities where people can work close to where they live, without extended commuting distances. A typical measure of completeness is the activity rate—the ratio of jobs to people in a municipality. The measure is a crude one, as it is highly influenced by the geography of a municipality. Thus, in Simcoe, highly urbanized municipalities with very little rural area such as Midland and Collingwood have very high activity rates (62% and 54% respectively) while rural municipalities with few urban centres such as Adjala-Tosorontio, Tay, and Tiny have very low activity rates (19%, 15%, and 13% respectively) (see Figure 21). Activity rates can also skew high where there are unusually large employers, such as in New Tecumseth (60%) and Penetanguishene (52%), which have significant employment associated with the Honda plant, the Waypoint Centre for Mental Health, and the Central North Correctional Centre.

That said, Figure 21 shows that at least three fast-growing and rapidly urbanizing municipalities in Simcoe—Bradford West Gwillimbury, Innisfil, and Wasaga Beach—exhibit relatively low activity rates (30%, 24%, and 20% respectively). The growth forecasts and land needs assessment in this report provide an opportunity for the County to direct employment growth to these municipalities in order to increase activity rates and promote complete communities.

Figure 21 – Activity Rates by Municipality, 2016



Source: Statistics Canada, 2016 Census

v. Location and Density of Employment Lands

The allocation of employment to lower-tier municipalities depends on the land need identified for Employment Areas and on the population allocation from the Community Area land needs assessment. The determination of Employment Area land needs in turn requires an understanding of the density of employment in Employment Areas.

In order to ensure that the employment allocations are informed by current real estate market trends, and the feasibility and appropriate location of Employment Areas, a report titled *Employment Strategy: Real Estate Market and Site Selection Perspectives* was prepared. This report can be found in Appendix B.

Appendix C contains a report *Employment Strategy: Employment Density Analysis* which provides an analysis of employment densities in established employment areas across Simcoe. The report concludes that the average Employment Area density in the County is 15.5 employees per net hectare. For the Employment Area land needs assessment a higher density of 20 employees per net hectare had been assumed for new development (see Section 5 for more discussion).

3. Framework For Analysis

This section describes the Provincial policy framework and requirements of the Provincial Land Needs Assessment Methodology that have been used to guide the growth outlook and lands needs assessment for the County of Simcoe. The framework for analysis of Simcoe land needs, which divides the County into two Regional Market Areas—Northern and Southern—is also discussed.

A. Two Regional Market Areas Are Proposed Based on Provincial Policy

The Provincial Policy Statement 2020 (PPS) provides provincial policy direction regarding, among other matters, land use, housing, environmental protection, agricultural lands, economic development and job creation, infrastructure and municipal servicing, and growth management. All planning decisions in Ontario must be consistent with the PPS and official plans are the most important vehicle for implementing its policies. As such, PPS policies must be carefully considered in undertaking the Simcoe MCR.

The PPS requires that in dealing with planning matters, population, housing, and employment projections be based on regional market areas (policy 1.2.1 g) and that an appropriate range and mix of housing options to meet projected requirements of residents must be provided for in these areas (policy 1.4.1).

A regional market area is defined in the PPS as an area that has a high degree of social and economic interaction. The upper or single-tier municipality, or planning area, will normally serve as the regional market area. However, where regional market areas are very large and sparsely populated, a smaller area, if defined in an official plan, may be utilized.

Policy 1.1.3 of the PPS addresses settlement areas, which are to be the focus of growth and development in municipalities. Settlement areas include urban areas and rural settlement areas within municipalities (such as cities, towns, villages and hamlets) that are either already built-up or include lands which have been designated in an official plan for development. Within settlement areas, sufficient land shall be made available through intensification and redevelopment and, if necessary, designated growth areas (policy 1.1.2).

PPS policies 1.1.3.8 and 1.1.3.9 establish rules for expanding settlement area boundaries within and outside the context of a formal comprehensive review should additional lands be required to accommodate the long-term population, housing and employment projections.

Building on the PPS, the Province has enacted a plan specifically to manage growth in the Greater Golden Horseshoe (the Growth Plan). Policies in the Growth Plan are to be read in conjunction with the PPS and take precedence where there is a conflict between the two documents. The Growth Plan includes detailed policies for managing growth, for planning for infrastructure to support growth, and for protecting certain land from development.

The Growth Plan refers to regional market areas in the context of the PPS definition, to which it adds: “Where a regional market area extends significantly beyond upper- or single-tier boundaries, it may include a combination of upper-, single- and/or lower-tier municipalities.”

In Simcoe, using a single regional market area for the County makes it difficult to direct growth to areas better suited to accommodate growth and development if there are vacant lands in other locations. The forecasts and land needs assessment in this report recognize fundamental differences in the growth dynamics between the rapidly growing southern part of the County and the more moderately-growing northern part of the County (notwithstanding several important urban centres in the north) by “splitting” the County into two regional market areas:

- the **Northern Regional Market Area (RMA)** – comprising the 11 municipalities of Clearview, Collingwood, Midland, Oro-Medonte, Penetanguishene, Ramara, Severn, Springwater, Tay, Tiny, and Wasaga Beach; and
- the **Southern Regional Market Area (RMA)** – comprising the 5 municipalities of Adjala Tosorontio, Bradford West Gwillimbury, Essa, Innisfil, and New Tecumseth.

Using two regional market areas acknowledges the historical growth trends and patterns of settlement described in Section 2 of this report. Specifically:

- The faster growing Southern RMA has strong commuting connections to the Greater Toronto Area and Barrie while the Northern RMA, as a whole, exhibits more moderate growth where people tend to either work locally or in Barrie or are among the many young retirees attracted to the communities in the north.
- Much of the growth pressure is in the Southern RMA, while much of the vacant land is in the Northern RMA. However, the growth pressures in the south—arising mainly from commuters to the Greater Toronto Area—cannot be entirely satisfied by developing in the north. Nor would it be good planning to significantly extend people’s commuting distance just because there are large legacy designations in parts of the Northern RMA.

The two regional markets areas are shown in Figure 22 below.

Figure 22 – Northern and Southern Regional Market Areas

Source: Hemson Consulting

i. Simcoe Sub-Area Policies of the Growth Plan Support Two RMAs

The County's MCR is required to conform to specific Growth Plan policies for the Simcoe Sub-Area, which covers the County and Barrie and Orillia. Among these Simcoe-specific policies are those that:

- direct a significant portion of population and employment growth within the Simcoe Sub-Area to 2051 to communities where development can be most effectively serviced, and where growth improves the range of opportunities for people to live, work, and play in their communities, with a particular emphasis on "primary settlement areas" (PSAs). Three of the primary settlement areas in the County are in the Southern RMA: Alcona, Bradford, and Alliston. Two are in the Northern RMA: Collingwood, and Midland/Penetanguishene (see Figure 23).

- identify two “strategic settlement employment areas”, along Highway 400 in Bradford West Gwillimbury and in Innisfil, and two “economic employment districts”, one centred on the Lake Simcoe Regional Airport in Oro-Medonte between Barrie and Orillia, and the other along Rama Road in Ramara (see Figure 23).

Figure 23 – Growth Plan, Simcoe Sub-Area

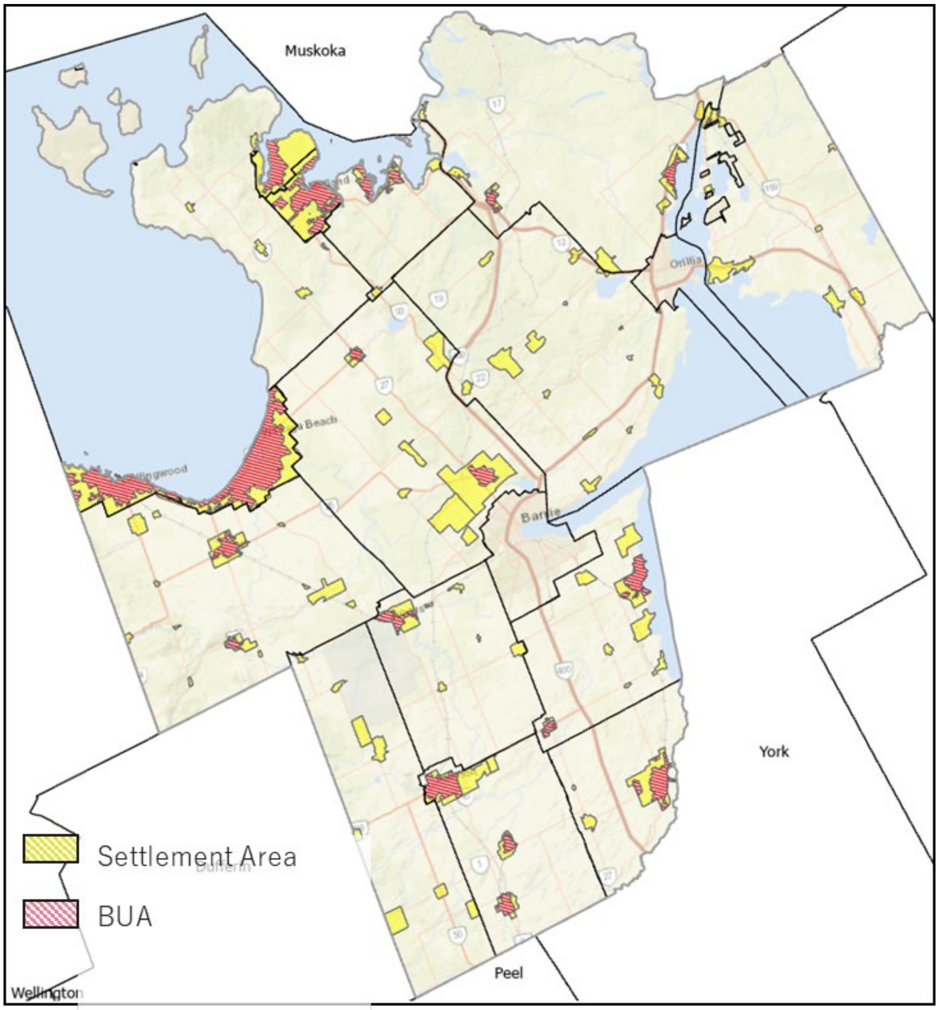
Source: Growth Plan, Schedule 8

By providing further direction on where growth is to occur in the Simcoe Sub-Area, the Growth Plan establishes a foundation for municipalities to align infrastructure investments with growth management, optimize the use of existing and planned infrastructure, co-ordinate water and wastewater services, and promote green infrastructure and innovative technologies. In this respect, it is noted that significant Provincial investment in regional GO transit in Innisfil and Bradford West Gwillimbury and in the Provincial highway network in the Simcoe Sub-Area will support the rapid development of higher density housing and employment lands in the Southern RMA.

ii. Growth Must Be Directed to Settlement Areas

In addition to the Simcoe Sub-Area policies, and building on the direction in the PPS, the Growth Plan requires that the forecasted growth in Schedule 3 be allocated based on the vast majority of growth being directed to settlement areas that have a BUA, have existing or planned municipal water and wastewater systems, and can support the achievement of complete communities. Growth is to be limited in settlement areas that are rural settlements, not serviced, or are in the Greenbelt Area. Figure 24 shows the settlement areas in the County, including those with a BUA.

Figure 24 – Settlement Areas in Simcoe County



Source: Hemson Consulting

B. GROWTH PLAN REQUIRES MORE COMPACT BUILT FORM, HIGHER DENSITY HOUSING, AND SHIFTS IN TRANSPORTATION MODE SPLIT

The Growth Plan also directs that the Schedule 3 forecasts be accommodated in "complete communities". Among other things, complete communities provide a full range of housing to accommodate a range of incomes and household sizes and support greenhouse gas emissions reductions (contributing to climate change) by planning for increased modal share of transit and active transportation and by building more of the community at transit-supportive densities in a compact built form (policy 2.1). To support complete communities, housing in the County is to be:

- diversified overall (policy 2.2.6.2 d).
- delivered in compact greenfield communities (policy 2.1).
- concentrated so that it supports a more diverse range and mix of housing options (policy 2.1). In this regard:
  - special emphasis is placed on providing higher-density housing options to address the challenge of housing affordability for smaller households; and
  - higher density housing that can accommodate a range of household sizes in locations that can provide access to transit and other amenities.
- The County must also consider tools to require that multi-residential development incorporate a mix of unit sizes to accommodate a diverse range of household sizes and incomes (policy 2.2.6.4). This policy is a clear expression of the Growth Plan's intention to encourage a shift in housing market preference through planning policy and market incentives.

The Growth Plan also emphasizes an "intensification first" approach to development which focusses less on continuously expanding the urban area and more on optimizing the existing urban land supply. To support this approach, the Growth Plan prescribes minimum intensification and density targets for the County:

1. A minimum percentage of all residential development occurring annually within the delineated BUA, based on maintaining or improving upon the minimum intensification target contained in the County Official Plan; and
2. A minimum density of 40 residents and jobs combined per hectare in the DGA.

The Growth Plan encourages the County, through its MCR, to go beyond the minimum intensification and density targets, where appropriate, except where doing so would conflict with other Provincial plans and policies (policy 5.2.5.1).

Complete communities are also to be achieved through targeted infrastructure investments. For example, the Growth Plan promotes alternatives to the automobile by requiring that the County develop policies to increase the modal share of transit and active transportation (policy 3.2.2.4). Transit is to be the County's first priority for transportation planning and investment (policy 3.2.3.1) and transit-supportive development, particularly in Priority Transit Corridors and Major Transit Station Areas (MTSAs). Other infrastructure, including public service facilities, is to be integrated with transit planning (policy 3.2.8). In this way housing, as well as jobs, schools, cultural, and recreational opportunities can access the transportation network through a variety of transportation modes (policy 3.2.2.2 d). Moreover, travel times, especially commuting distances, are to be kept to a minimum.

i. Growth Plan Policies Are Reflected in County Official Plan

The growth outlook and land needs assessment is also informed by existing growth management policies in the County Official Plan. These policies already reflect the Growth Plan policy direction set out above (see Table 5).

Table 5 – County Official Plan – Select Growth Management Policies

Official Plan Theme	Official Plan Policy Direction
Direct significant growth to settlements, especially PSAs	PSAs to develop as complete communities with high intensification and density targets and public transit services.
	Settlement areas shall be the focus of population and employment growth and their vitality and regeneration shall be promoted.
	Majority of growth to be directed to fully serviced settlements.
	Develop a compact urban form that promotes the efficient use of land and provision of water, sewer, transportation, and other services.
	Develop mixed use settlements as strong and vibrant central places and to create healthy settlements and communities that are sustainable.
	Promote development forms and patterns which minimize land consumption and servicing costs.
Develop communities with diverse economic functions & opportunities, & range of housing options, including affordable housing	County as a whole will plan for and invest for a balance of jobs and housing to reduce the need for long distance commuting and promote alternative transportation choices and usage.
	Each local municipality will identify, plan for, protect & preserve employment areas.
Recognize, preserve & protect the rural character & promote long-term diversity & viability of rural economic activities	Lands in the Rural designation shall be the focus of rural and agricultural land uses.

C. LNA METHODOLOGY REQUIRES ANALYSIS OF MARKET DEMAND

The LNA Methodology introduces important changes to the municipal land needs assessment process including:

- that housing supply and demand be explicitly analyzed in terms of total housing and housing by type;
- that market contingency factors including rental vacancies, constrained lands, landowner unwillingness to develop, the length of the planning process, and other economic and demographic factors that may not have been anticipated in the Growth Plan Schedule 3 forecasts be considered in the determination of available land supply; and
- that a "market-based supply of housing" be provided to the extent possible in determining lands required to accommodate growth while achieving Growth Plan policy targets.

These directives are reinforced by recent changes to the PPS which requires that planning for housing be done with reference to "market demand" (see policies 1.1.1, 1.1.3.8, and 1.4.3).

The need for land in Community Areas is driven by the demand for housing, mainly ground-related housing as apartments take up relatively little land and are primarily accommodated within the existing urban area (the BUA and existing DGA). The implementation of Growth Plan policies requires that the County plan for a shift in current housing mix and pattern so that:

- More growth is accommodated within the BUA (where the vast majority of new units are apartments in medium and high density forms);
- Higher levels of intensification are intended to reduce the amount of new DGA land required for housing (typically DGA development is nearly all ground-related housing with a limited number of apartment buildings developed, at least during the first decades of development); and
- There is a significant share of higher density housing types, in addition to the ground-related housing so that the overall housing supply can accommodate a full range and diverse mix of household types and household sizes. Planning for a wider variety of housing in Simcoe is a key element of the Growth Plan vision (policy 1.2).

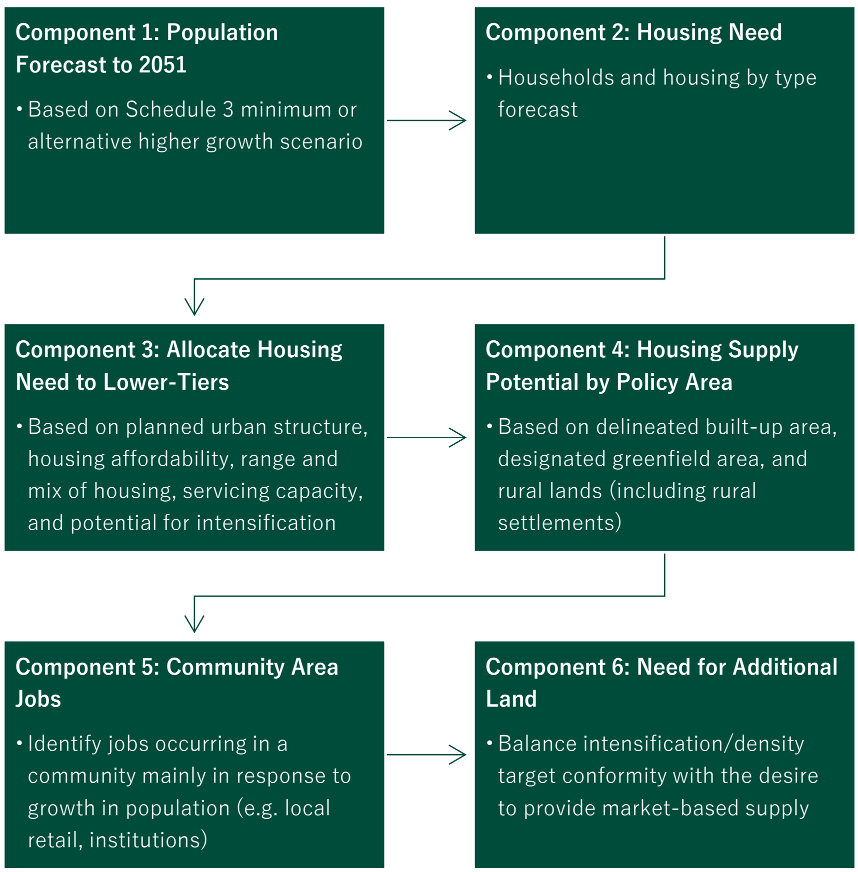
At the same time, given the needs of the local population to have available a full range of housing types, the expected market-based demand must be considered in assessing Community Area land needs.

Taken together, these policies require the County to plan to shift the pattern of housing growth from the predominantly ground-related forms that have characterized Simcoe in the past, while also considering local market demand, where most of the household growth continues to be in family households who favour ground-related units. The balancing of these interests is a challenge in assessing Community Area land needs.

4. COMMUNITY AREA LAND NEEDS ASSESSMENT

The approach for determining Community Area land needs for the Northern and Southern RMA follows the six-step approach set out in the Provincial LNA Methodology (see Figure 25). These steps are discussed in greater detail in the following sections.

Figure 25 – Steps for Determining Community Area Land Need for Each RMA



A. STEP 1 – POPULATION GROWTH OUTLOOK

The LNA Methodology requires that population projections determining housing needs be based on the Schedule 3 (or higher) forecast in the Growth Plan. To satisfy this requirement, the County's land needs assessment is based on the population age structure summarized in Appendix B to the background report prepared for the Province as part of the recent Schedule 3 update. The Reference Forecast at 2051 in this report forms the basis of the Schedule 3 forecasts.[10]

The County's annual population growth rate has fluctuated since the late 1980s (see Table 6). At the time of the last Census in 2021 the County's population was 360,670. The Schedule 3 forecast shows the County's population to be 555,000 by 2051. This represents growth of 194,330 over the 30 year period 2021 to 2051 at a compound annual growth rate of 1.4%. This growth rate is lower than the historical rate from 1991-2021 of 1.9%. However, the amount of growth is considerable in light of recent growth fluctuations. Most growth will be generated by in-migration from the Greater Toronto Area.

Table 6 – Historical and Forecast Population in Simcoe

Census Year	Total Population[1]	Population Growth	Annual Growth Rate
1986	170,170		
1991	206,430	36,260	3.9%
1996	229,400	22,970	2.1%
2001	253,520	24,120	2.0%
2006	271,020	17,500	1.3%
2011	284,490	13,470	1.0%
2016	314,570	30,080	2.0%
2021	**360,670**	**46,100**	**2.8%**
2026	395,650	34,980	1.9%
2031	430,240	34,590	1.7%
2036	464,250	34,010	1.5%
2041	495,340	31,090	1.3%
2046	525,460	30,120	1.2%
2051	**555,000**	**29,540**	**1.1%**
1991-2021		**154,240**	**1.9%**
2021-2051		**194,330**	**1.4%**

Source: Hemson Consulting

1: Total population includes Census Net Undercoverage

New policies in the Growth Plan (sections 2.2.1 and 5.2.4.1) establish the Schedule 3 forecasts of population and employment at 2051 as minimums. The County may now choose higher forecasts through its MCR process. However, the forecasts in this report are

[10] Hemson Consulting, *Greater Golden Horseshoe: Growth Forecasts to 2051*, August 2020.

premised on the Schedule 3 forecasts being reasonable for the purposes of long-term planning of the County.

B. STEP 2 – HOUSING NEEDS

The LNA Methodology requires that the population forecast by age group be translated into a forecast of households. To do this, the Methodology prescribes the use of Statistics Canada's Census age of primary household maintainer data to calculate initial household formation rates for each age group to determine household growth. Having established the forecast households, the age-specific occupancy patterns are applied to the households to yield a housing unit forecast by dwelling structure type. Finally, the housing growth by type must be adjusted to account for any replacement of units (e.g. through demolition), changes in rental vacancies, market contingency factors, and other mitigating considerations.

i. Historical and Forecast Housing Growth

The determination of housing need first requires the translation of the population forecast into a forecast of households based on age-specific household formation rates (or headship rates). The County's 2016 and estimated 2021 household formation rates as well as the 2021 and 2051 households by age and the resulting growth within each age group are provided in Table 7.

Table 7 – Simcoe Household Forecast by Age of Primary Household Maintainer

Age	2016	2021		2051	
	Household Formation Rates	Household Formation Rates	Households by Age	2051 Households by Age	2021-2051 Household Growth by Age
15 - 19	0.4%	0.4%	80	140	60
20 - 24	7.2%	7.1%	1,310	2,280	970
25 - 29	26.6%	25.9%	6,330	9,170	2,840
30 - 34	41.7%	40.4%	8,930	13,560	4,630
35 - 39	48.7%	46.9%	10,010	16,610	6,600
40 - 44	51.2%	49.5%	9,890	18,330	8,440
45 - 49	52.8%	51.2%	11,470	19,460	7,990
50 - 54	54.7%	53.0%	12,330	20,980	8,650
55 - 59	56.1%	54.6%	15,280	23,100	7,820
60 - 64	55.6%	54.3%	14,220	20,060	5,840
65 - 69	57.1%	55.7%	12,650	18,700	6,050
70 - 74	61.6%	60.2%	12,030	18,380	6,350
75 - 79	61.7%	60.2%	8,450	17,270	8,820
80 - 84	63.5%	62.0%	5,290	14,840	9,550
84 - 89	60.5%	59.0%	2,900	12,020	9,120
90 +	46.3%	44.9%	1,290	6,650	5,360
TOTAL	**45.4%**	**44.5%**	**132,480**	**231,560**	**99,080**

Source: Hemson Consulting

Table 8 shows the household forecast based on the household formation rates set out in Table 7. The total number of households in the County is forecast to be 231,560 in 2051. This represents growth of 99,080 households over the 30-year period from 2021 to 2051 at an average annual growth rate of 1.9%. This growth rate is higher than the annual population growth rate of 1.4% and lower than the historical annual household growth rate of 2.6% between 1991 and 2021.

Table 8 – Simcoe Household Forecast

Census Year	Occupied Households	Household Growth	Annual Growth Rate
1986	55,500		
1991	61,830	6,330	2.2%
1996	70,400	8,570	2.6%
2001	88,260	17,860	4.6%
2006	97,930	9,670	2.1%
2011	105,750	7,820	1.5%
2016	117,020	11,270	2.0%
2021	**132,480**	**15,460**	**2.5%**
2026	150,850	18,370	2.6%
2031	168,010	17,160	2.2%
2036	185,420	17,410	2.0%
2041	202,670	17,250	1.8%
2046	217,320	14,650	1.4%
2051	**231,560**	**14,240**	**1.3%**
1991-2021		**70,650**	**2.6%**
2021-2051		**99,080**	**1.9%**

Source: Hemson Consulting

ii. Market Based Housing Forecast

The social construct of the household is then translated into the physical housing units by structure type by applying age specific occupancy patterns to the age structure of the households. The "market-based" forecast of housing by type is based on the propensity of households by age to occupy different types of housing. Age of primary household maintainer is a primary determinant of the type of household: single person, single-parent, couple households with or without children at home, and non-family households.

In accordance with the Provincial LNA Methodology, the background work to Schedule 3 contains housing "forecasts [that] reflect the baseline reference scenario to be used by municipalities and form the basis for establishing a market-based supply of housing". The following unit types were distinguished for this purpose:

- Singles/semis – which includes single-detached and semi-detached houses as well as movable dwellings as defined by Statistics Canada for the Census. Singles/semis also includes existing houses where an accessory units has been added.

- Rows – which are row houses as defined by the Census.
- Apartments – which comprise all apartment buildings, whether greater than or less than 5 storeys (per Census definitions).
- Accessory units – which are apartments added to an existing single or semi-detached house.

Tables 9 and 10 set out the historical and market forecast of housing by type. The premise of the market forecast is to adjust the occupancy patterns so that housing growth generally reflects the mix of the past 20 years as well as the higher household growth among young adults and seniors, both of which exhibit a higher preference for apartments (see Figure 12).

The result is an expectation of a market demand housing growth mix of 70% singles and semis, 17% rows, and 12% apartments over the next 30 years (see Table 10). Accessory units are forecast to represent only about 1% of the stock and 1% of the housing growth in the County. This contrasts with a historical market demand housing growth mix of 77% singles and semis, 13% rows, and 10% apartments between 2001 and 2021 (see Table 9).

Table 9 – Simcoe Market Demand Based Forecast, Historical Housing Mix

Census Year	Singles & Semis	Rows	Apartment Buildings	Accessory Units	Total
2001	77,170	2,360	7,430	1,300	88,260
2011	91,640	3,980	8,730	1,400	105,750
2021	**111,290**	**8,030**	**11,660**	**1,500**	**132,480**
Historical Housing Growth					
2001-11	14,470	1,620	1,300	100	17,490
2011-21	19,650	4,050	2,930	100	26,730
2001-21	**34,120**	**5,670**	**4,230**	**200**	**44,220**
Historical Housing Mix					
2001	87%	3%	8%	1%	100%
2011	87%	4%	8%	1%	100%
2021	**84%**	**6%**	**9%**	**1%**	**100%**
Historical Housing Mix of Growth					
2001-11	83%	9%	7%	1%	100%
2011-21	74%	15%	11%	0%	100%
2001-21	**77%**	**13%**	**10%**	**0%**	**100%**

Source: Hemson Consulting

Table 10 – Simcoe Market Demand Based Forecast, Forecast Housing Mix

Census Year	Singles & Semis	Rows	Apartment Buildings	Accessory Units	Total
2021	111,290	8,030	11,660	1,500	132,480
2031	136,430	14,070	15,710	1,800	168,010
2041	160,780	19,960	19,730	2,200	202,670
2051	**180,640**	**25,010**	**23,400**	**2,500**	**231,550**
Forecast Housing Growth					
2021-31	25,140	6,040	4,050	300	35,530
2031-41	24,350	5,890	4,020	400	34,660
2041-51	19,860	5,050	3,670	300	28,880
2021-51	**69,350**	**16,980**	**11,740**	**1,000**	**99,070**
Forecast Housing Mix					
2021	84%	6%	9%	1%	100%
2031	81%	8%	9%	1%	100%
2041	79%	10%	10%	1%	100%
2051	**78%**	**11%**	**10%**	**1%**	**100%**
Forecast Housing Mix of Growth					
2021-31	71%	17%	11%	1%	100%
2031-41	70%	17%	12%	1%	100%
2041-51	69%	17%	13%	1%	100%
2021-51	**70%**	**17%**	**12%**	**1%**	**100%**

Source: Hemson Consulting

C. STEP 3 – HOUSING NEEDS ALLOCATION TO LOWER-TIER MUNICIPALITIES

Step 3 of the Methodology directs that the housing forecast be allocated to the lower-tier municipalities. The allocation of future housing and population to lower-tiers depends in part on historical growth trends, the requirements of Growth Plan policies that, among other things, direct a significant portion of growth to primary settlement areas, and the distribution of future potential supply by policy area. The housing allocations by type to the lower-tier municipalities are set out in Appendix D. The population allocations are summarized in Table 11 below. About 64% of all population growth is forecast to occur in the Southern RMA, mainly in Innisfil, New Tecumseth, and Bradford West Gwillimbury (with 20%, 18%, and 20% of total growth respectively). Growth in the Northern RMA is forecast to be concentrated in Collingwood, Wasaga Beach, Springwater, Clearview, Midland, and Penetanguishene.

Table 11 – Simcoe Population Allocations to Lower-Tiers

Municipality	2021	2051	2021-51
Adjala-Tosorontio	11,260	11,970	710
Bradford West Gwillimbury	44,490	83,470	38,980
Essa	23,810	34,740	10,930
Innisfil	44,710	84,450	39,740
New Tecumseth	45,480	80,590	35,110
Clearview	15,220	21,820	6,600
Collingwood	25,470	42,690	17,220
Midland	18,250	24,290	6,040
Oro-Medonte	23,770	26,230	2,460
Penetanguishene	10,340	14,390	4,050
Ramara	10,680	12,870	2,190
Severn	14,750	17,790	3,040
Springwater	22,320	32,490	10,170
Tay	11,410	13,130	1,720
Tiny	13,240	16,010	2,770
Wasaga Beach	25,480	38,090	12,610
Southern RMA	**169,750**	**295,220**	**125,470**
Northern RMA	**190,930**	**259,800**	**68,870**
Simcoe County	**360,680**	**555,020**	**194,340**

Source: Hemson Consulting

D. STEP 4 – HOUSING SUPPLY POTENTIAL BY POLICY AREA

The allocation of housing need to the lower-tier municipalities is in part informed by the ability of each municipality to accommodate the range of dwelling types included in the overall housing need for the County. Housing supply potential has been catalogued by policy area for each municipality. This has been an ongoing process mostly completed in the fall of 2021 using a 2020 base. The supply has taken account of estimated housing unit completions from mid-2016 to mid-2021 to bring the supply up the 2021 base year.

i. Rural Area

Future supply in the rural area includes legacy rural estate residential subdivisions, available lots within rural settlements, and existing lots-of-record in rural areas where a house can be built. Supply for new construction is limited and is not anticipated to grow except in municipalities without urban settlement areas (and no BUA or DGA).

For most municipalities expected demand is forecast based generally on the level of rural construction in recent years. This approach means the demand for units and supply potential are assumed to be equal. If the demand does not materialize or the supply is not available as estimated, both figures adjust accordingly. Unlike other policy areas, there is no expectation that the County now or at any time in the future would take any action to create new rural housing supply in order to satisfy the estimated number of units that might be built in the rural area.

ii. Delineated Built-Up Area (BUA)

The Province defined the BUA in 2008 as areas within the Built Boundary, which roughly represents the limit of residential development in June 2006. In accordance with the policies of the Growth Plan, only development occurring within the BUA is used to meet the minimum intensification target.

Intensification in the Simcoe BUA can be achieved in many ways. It can take the form of new homes on vacant lots, either as infill where there is a “gap” in the street or through a traditional lot severance or subdivision. It can also take the form of redevelopment, for example through:

- replacement of a single detached unit on a corner lot with multiple row houses;
- replacement of a parking lot in a downtown area or main street with a mid-rise apartment building;
- conversion of basements in single detached units to secondary suites;
- construction of detached secondary suites (“garden suites” or laneway housing on larger lots); and/or
- conversion of underutilized or vacant employment lands to residential uses.

For the land needs assessment, the purpose of identifying future supply is to demonstrate that the allocation of unit growth to the BUA can reasonably be accommodated. Typically, it is desirable to have a larger identified supply potential than required, since there is always great uncertainty about how and when redevelopment sites may be brought to market within any given time period.

Most of the supply potential identified in the BUA is in primary settlement areas and other larger urban centres. Over time, the BUA can be expected to accommodate a substantial number of units, but there is no reasonable or reliable way to identify the locations where these will occur.

Housing supply potential in the BUA establishes the potential for the County to achieve its minimum intensification target of 32% prescribed by the Growth Plan. A desktop analysis of the supply potential of the BUA, based on its size, location, and capacity suggests that a higher target of 36% is achievable across the County. To achieve this overall County target, the following local targets have been used for the Community Area land needs analysis (Table 12). In general, they represent higher targets than those set out in the current (2016) County Official Plan.[11]

Table 12 – Simcoe Intensification Targets

Lower-Tier Municipality	2016 Official Plan Intensification Rate	2021 Land Needs Assessment Intensification Rate
Adjala-Tosorontio	20%	n/a
Bradford West Gwillimbury	40%	42%
Clearview	20%	30%
Collingwood	40%	50%
Essa	20%	30%
Innisfil	33%	33%
Midland	40%	50%
New Tecumseth	40%	37%
Oro Medonte	20%	n/a
Penetanguishene	40%	50%
Ramara	20%	n/a
Severn	20%	20%
Springwater	15%	15%
Tay	20%	20%
Tiny	20%	n/a
Wasaga Beach	20%	50%
Southern RMA	**n/a**	**36%**
Northern RMA	**n/a**	**35%**
Simcoe County	**32%**	**36%**

[11] The 32% intensification rate in the Official Plan was approved by the Minister of Municipal Affairs and Housing in 2012. Targets for municipalities without a BUA (Adjala-Tosorontio, Oro-Medonte, Ramara, Tiny) are not applicable.

The intensification targets in Table 12 represent roughly double the intensification rate that has been experienced in the County since the Growth Plan intensification targets took effect in 2015 (see Table 13). For larger urban municipalities in the Northern RMA, especially those with primary settlement areas (Collingwood and Midland/ Penetanguishene) as well as Wasaga Beach, the proposed intensification targets are consistent with recent levels of intensification. In the Southern RMA, the proposed intensification rates represent more transformational change.

Table 13 – Intensification in the Simcoe BUA 2016-2021

Municipality	Unit Growth	Unit Growth in BUA	BUA Share
Adjala-Tosorontio	72	0	0%
Bradford West Gwillimbury	1,206	130	11%
Essa	465	92	20%
Innisfil	1,064	42	4%
New Tecumseth	1,680	112	7%
Clearview	319	29	9%
Collingwood	1,048	389	37%
Midland	304	153	50%
Oro-Medonte	512	0	0%
Penetanguishene	168	87	52%
Ramara	253	0	0%
Severn	441	106	24%
Springwater	462	4	1%
Tay	341	110	32%
Tiny	299	0	0%
Wasaga Beach	1,127	541	48%
Southern RMA	**4,487**	**376**	**8%**
Northern RMA	**5,274**	**1,419**	**27%**
Simcoe County	**9,761**	**1,795**	**18%**

Source: Statistics Canada, Building Permits

It is also noted that the intensification over the last five years has taken place in the context of lower housing growth than forecast moving forward. Achieving the proposed intensification targets requires a significant increase in the number of new homes constructed in the BUA; and most of the additional units will have to be constructed as redevelopment and as apartments. Lower-tier municipalities, through their local planning, will play a key role in developing strategies to achieve the intensification targets through zoning, design guidelines, identifying strategic growth areas, and infrastructure planning.

iii. Existing Designated Greenfield Area (DGA)

DGA supply involves determining:

- Housing units by type in each regional market area that have been approved in plans or subdivision or through MZOs—represented either by vacant lots or multiple dwellings that have yet to be constructed on designated lands.[12] These units are generally anticipated to be constructed and occupied in the near and medium term.

- Housing units on vacant, designated lands available for development. This requires estimating the units by type on such lands based on density permissions in Official Plans, the density of recently constructed subdivisions, and density targets established through the MCR.

The density targets used in the land needs assessment are set out in Table 14. They represent much higher densities than those currently established in the County Official Plan. There are two reasons for this. First, the targets reflect Provincial and local policy direction to promote a more compact built form and higher density housing. Second, the DGA density measure in the Growth Plan has changed since the Official Plan was adopted in 2016 so that Employment Areas are no longer included in the calculation. Because Employment Areas have lower average densities, the minimum density target of 40 residents and jobs per hectare is much lower than previous targets.

[12] MZOs treated as DGA supply include the Orbit and Tollendale Village in Innisfil, Beeton in New Tecumseth (910 units including 400 seniors apartments, 173 townhouses, 40 semis, and 297 singles), Elmvale Active Seniors Residence in Springwater, and a facility for adults with complex special needs in Tay.

Table 14 – Simcoe DGA Density Targets

Lower-Tier Municipality	2016 Official Plan Density[1] Target	2021 Land Needs Assessment Density[1] Target
Adjala-Tosorontio	32	n/a
Bradford West Gwillimbury	35	55
Clearview	32	45
Collingwood	50	55
Essa	32	45
Innisfil	32	60
Midland	50	55
New Tecumseth	50	55
Oro Medonte	32	n/a
Penetanguishene	50	55
Ramara	32	n/a
Severn	32	45
Springwater	32	45
Tay	32	45
Tiny	32	n/a
Wasaga Beach	32	55
Southern RMA	**n/a**	**54**
Northern RMA	**n/a**	**47**
Simcoe County	**39**	**51**

Note 1: Residents and jobs per hectare

iv. Housing Supply by Policy Area for Each RMA

Table 15 below provides the housing supply for each Regional Market Area. The analysis includes the identification of available supply potential within the three policy areas (Rural Area, BUA and DGA). The analysis examines each housing type separately: singles/semis, rows and apartments. Accessory units are included within the supply of singles/semis.

Table 15 – Simcoe Housing Supply Potential by Policy Area, 2021-2051 Growth

Southern RMA				
Policy Area	**Single/Semi**	**Row**	**Apartment**	**Total**
Delineated Built Up Area (BUA)	310	750	830	1,890
Designated Greenfield Area (DGA)	5,980	3,520	5,210	14,710
Rural Lands	5,850	1,210	390	7,450
Total Identified Supply	12,140	5,480	6,430	24,050
Total Identified Supply	*50%*	*23%*	*27%*	*100%*

Northern RMA				
Policy Area	**Single/Semi**	**Row**	**Apartment**	**Total**
Delineated Built Up Area (BUA)	2,940	3,800	3,400	10,140
Designated Greenfield Area (DGA)	22,420	12,960	6,450	41,830
Rural Lands	19,220	1,370	340	20,930
Total Identified Supply	44,580	18,130	10,190	72,900
Total Identified Supply	*61%*	*25%*	*14%*	*100%*

Source: Hemson Consulting

E. STEP 5 – COMMUNITY AREA EMPLOYMENT

Community Area employment is considered in order to demonstrate that jobs in Community Areas have been accommodated in the land need. Most Community Area jobs are population related: jobs occurring in a community mainly to provide services to a resident population. At the neighbourhood scale, population related employment are those jobs in local retail and services, schools, and other local institutions and work-at-home employment. Beyond the neighbourhood scale, but still within the Community Area, population related employment includes jobs in larger retail sites and in larger institutions such as high schools, post-secondary institutions, hospitals, and other public services.

The Community Area employment is included when land needs for private lots for housing are "grossed up" to account for public lands such as stormwater management facilities, local roads, and local schools, as well as population related jobs. The "net to gross" ratio used for Community Area in Simcoe ranges from about 50% to about 65% based on existing plans of subdivision. It includes provision for a 2.5% land vacancy on existing DGA supply, since not every greenfield site will come to market (nearly all do come to market eventually but larger former rural lots that come into the urban area often persist for decades before being developed).

The DGA density targets, which measure all people and jobs in the DGA, also account for the Community Area employment required.

F. STEP 6 – NEED FOR ADDITIONAL LAND

Table 16 summarizes the household forecast between the BUA, DGA, and Rural Area between 2021 and 2051. The allocation to policy areas (and ultimately to the policy areas within the local municipalities) assumes that:

- Almost all units in the Rural Area in the Northern RMA (96%) are single detached whereas the unit mix in the Rural Area in the Southern RMA is broader—77% singles/semis; 16% rows; and 7% apartments.
- Because it is mostly redevelopment, the unit mix in the BUA is heavily weighted towards apartments—70% apartments in the Southern RMA and 55% apartments in the Northern RMA.
- Most units in the DGA are ground-related, with the unit mix being denser in the Southern RMA than in the Northern RMA—65% singles/semis, 15% rows, and 20% apartments as opposed to 68% singles/semis, 24% rows, and 8% apartments. This is a higher density mix than what has been experienced in the past but one which is not inconsistent with units in active plans and growth trends (see Section 2).
- The lands covered by the Orbit MZO, which are planned to accommodate 3,850 units (75% apartments; 25% rows), are treated as DGA.

Table 16 – Simcoe Housing Forecast by RMA and Policy Area, 2021-2051 Growth

Southern RMA				
Policy Area	**Single/Semi**	**Row**	**Apartment**	**Total**
Delineated Built Up Area (BUA)	2,070	4,140	14,490	20,700
Designated Greenfield Area (DGA)	20,720	4,770	6,320	31,810
Rural Lands	3,430	690	310	4,430
Total Mix of Demand	**26,220**	**9,600**	**21,120**	**56,940**
Total Mix of Demand	*46%*	*17%*	*37%*	*100%*

Northern RMA				
Policy Area	**Single/Semi**	**Row**	**Apartment**	**Total**
Delineated Built Up Area (BUA)	2,930	3,670	8,070	14,670
Designated Greenfield Area (DGA)	13,320	4,710	1,650	19,680
Rural Lands	7,490	140	170	7,800
Total Mix of Demand	**23,740**	**8,520**	**9,890**	**42,150**
Total Mix of Demand	*56%*	*20%*	*23%*	*100%*

Source: Hemson Consulting

The next step in the Provincial LNA Methodology is to compare the supply by unit type for each RMA to determine if housing forecasts (demand) in Table 16 fit within the identified supply in Table 15. The main purpose of this analysis is to determine whether or not there is a shortfall in supply for the DGA (supply in the Rural Area is effectively unlimited given the number of scattered vacant lots; and supply in the BUA, at least for apartments, is theoretically unlimited). The analysis is done in reference to unit type as required by the Methodology. Any shortfall would indicate the need for additional Community Area land to be designated.

Table 17 demonstrates that in the Southern RMA there is a deficit of land for DGA development, equivalent to 17,100 units (14,740 singles/semis, 1,250 rows, and 1,110 apartments). Conversely, in the Northern RMA there is a surplus of land for DGA development to 2051, equivalent to 22,150 units (9,100 singles/semis, 8,250 rows, and 4,800 apartments).

Table 17 – Comparison of Housing Supply and Demand for Each RMA

Southern RMA				
Policy Area	**Single/Semi**	**Row**	**Apartment**	**Total**
Delineated Built Up Area (BUA)	(1,760)	(3,390)	(13,660)	(18,810)
Designated Greenfield Area (DGA)	(14,740)	(1,250)	(1,110)	(17,100)
Rural Lands	2,420	520	80	3,020
Surplus (Shortage)	**(14,080)**	**(4,120)**	**(14,690)**	**(32,890)**

Northern RMA				
Policy Area	**Single/Semi**	**Row**	**Apartment**	**Total**
Delineated Built Up Area (BUA)	10	130	(4,670)	(4,530)
Designated Greenfield Area (DGA)	9,100	8,250	4,800	22,150
Rural Lands	11,730	1,230	170	13,130
Surplus (Shortage)	**20,840**	**9,610**	**300**	**30,750**

Source: Hemson Consulting

i. Community Area Land Need in the Southern RMA

Having determined that there is a unit shortfall in the DGA in the Southern RMA, it can now be translated into a land need. The ground-related unit shortfall drives the land need, although there is technically a deficit of DGA apartments. However, in the context of considering market-based housing supply, units cannot simply be “swapped out” to reduce the shortfall in ground-related units.

The housing shortfall for ground-related units in the Southern RMA is first restated in terms of population, applying a person per unit factor, which also accommodates factors for non-household population, and Census net undercoverage to assure population is always being measured the same way. Once the total population associated with the unit shortfall is established, a factor for Community Area employment is added at one job for every 10 residents.

With total persons plus jobs in the potential expansion areas known, the land need can be calculated on based on the Growth Plan density targets set out in Table 13. For the Community Area land need the following is calculated:

- Need for land for 14,740 singles/semis and 1,250 rows;

- Because communities in the DGA would not be built without apartments or accessory units, the total number of units needing additional land is 17,100, which includes 1,110 apartment units or 6% of total units.

- Applying persons per unit factors by unit type and location, including provision for the non-household population and Census net undercoverage, results in a population associated with the new land need of 56,324.

- Adding the Community Area jobs expected within these neighbourhoods (10% of total person and jobs) yields a total person and jobs of 62,583.

- At the assumed DGA densities set out in Table 13 (which translates into a "blended" density of 54 people and jobs per hectare), the additional DGA land need for the Southern RMA is 1,156 hectares of new Community Area (see Table 18).

Table 18 – Summary of DGA Land Need in Southern Regional Market Area

Southern RMA	
Remaining Units to be Developed on New DGA	17,090
Forecast Total Population in New Units	56,324
Expected Population Related Employment	6,258
People and Jobs	**62,583**
Estimated DGA Density (People and Jobs per Hectare)	54
Total Developable Land Need (gross ha)	**1,156**

Source: Hemson Consulting

ii. Southern RMA Community Area Land Need at the Local Level

The new Southern RMA Community Area land need of 1,156 hectares has been split between Innisfil, Bradford West Gwillimbury, Essa, and New Tecumseth (see Table 19).

- Given its capacity to accommodate a significant amount of its DGA growth in the Orbit MZO, Innisfil requires additional DGA land for 1,483 units, including 650 singles/semis and 98 rows. The Community Area people and jobs associated with these units is 4,212 which, at a DGA density of 60 persons and jobs per hectare, translates into a Community Area land need of 70.2 hectares.

- Bradford West Gwillimbury requires additional DGA land for 7,122 units, including 5,825 singles/semis and 875 rows. The Community Area people and jobs associated with these units is 27,654 which, at a DGA density of 55 persons and jobs per hectare, translates into a Community Area land need of 502.6 hectares.

- Essa requires additional DGA land for 1,580 units, including 1,507 singles/semis and 67 rows. The Community Area people and jobs associated with these units is 6,064 which, at a DGA density of 45 persons and jobs per hectare, translates into a Community Area land need of 134.8 hectares.

- New Tecumseth requires additional DGA land for 6,917 units, including 6,758 singles/semis and 205 rows. The Community Area people and jobs associated with these units is 24,662 which, at a DGA density of 55 persons and jobs per hectare, translates into a Community Area land need of 448.4 hectares.

The bottom of Table 19 also demonstrates that, based on the above analysis, the average number of housing units per net hectare of land in the DGA ranges from 23.5 units per net hectare in Essa to 42.3 units per net hectare in Innisfil. By way of comparison, a net density of 30 units per net hectare translates roughly into lot dimensions of 36’ frontage and 100’ depth (3,600 sq.ft. area).

The location and configuration of the additional Community Area lands in the Southern RMA will be addressed in the next phase of the MCR.

Table 18 - Summary of Community Area Land Needs Assessment for Southern Regional Market Area					
Steps in Calculation	**DGA COMMUNITY AREA LAND NEED**				
	Data Input	**Innisfil**	**Bradford West Gwillimbury**	**Essa**	**New Tecumseth**
Estimate Population in New Units in DGA That Require Additional Lands	New DGA Unit Requirement	(1,483)	(7,122)	(1,580)	(6,917)
	Singles/semis	(650)	(5,825)	(1,507)	(6,758)
	Rows	(98)	(875)	(67)	(205)
	Apartments	(735)	(421)	(6)	46
	Persons per Unit (PPU) in New Units				
	Singles/semis	3.22	3.55	3.13	3.06
	Rows	2.79	2.77	2.80	2.54
	Apartments	1.72	1.30	1.36	1.28
	Population in New Units	3,637	23,673	4,914	21,109
	Singles/semis	2,094	20,696	4,718	20,649
	Rows	274	2,428	188	520
	Apartments	1,268	549	8	(60)
Adjust Population in New Units to Account for Non-Household Population	2016 Household Population	36,125	34,790	19,650	33,730
	2016 Census Population	36,585	35,311	21,100	34,242
	Non-Household Population	460	521	1,450	512
	Non-Household Population (%)	1.3%	1.5%	6.9%	1.5%
	Census Population (HH and Non-HH)	**3,683**	**24,028**	**5,277**	**21,430**
Adjust Population for Net Undercoverage	Census Net Undercoverage	2.8%	3.4%	3.3%	3.4%
	Population in New Units With Undercoverage	3,791	24,880	5,458	22,195
Factor in Community Area Jobs	Community Area Jobs (factor)	10%	10%	10%	10%
	Community Area Persons & Jobs (#)	**4,212**	**27,645**	**6,064**	**24,662**
Apply GP Density Target	DGA Density (people+jobs per ha)	60	55	45	55
	New Community Area Gross Land Need (ha)	**70.2**	**502.6**	**134.8**	**448.4**

Note: Because of CFB Borden, we have used a "normal" non-HH population of 1.3% and Census net undercoverage rate of 2.8% for Essa.

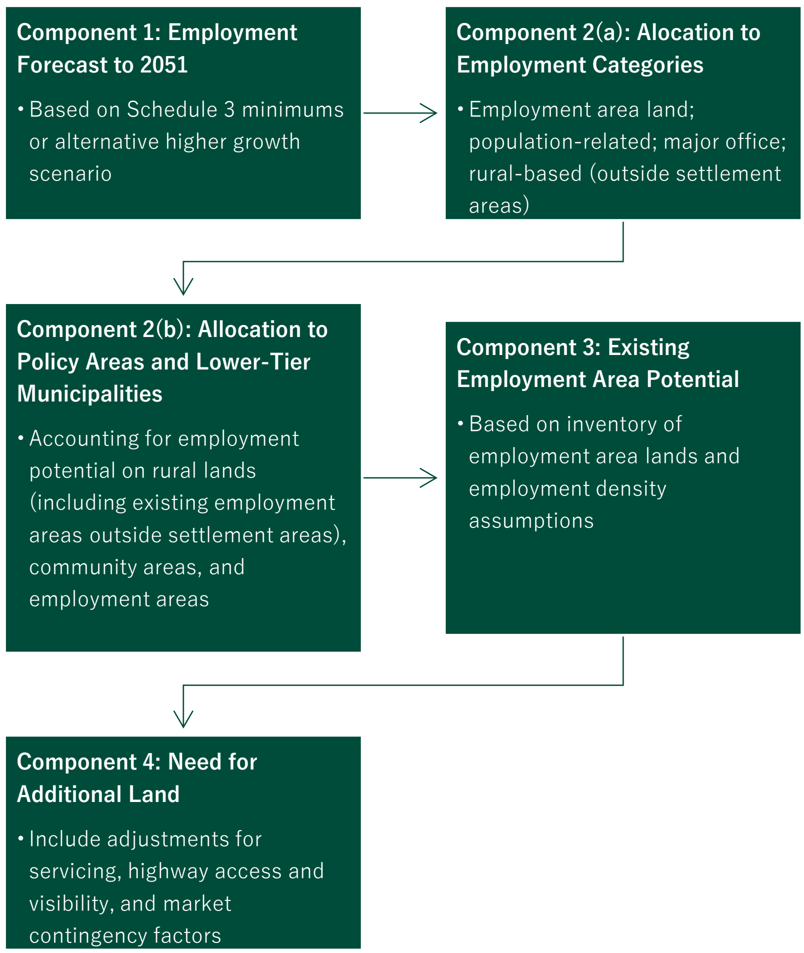
Steps	**DGA COMMUNITY AREA LAND NEED (CHECK)**				
Cross Check Net Density of Units (units per net ha) base on above analysis	DGA Unit Shortgage	(1,483)	(7,122)	(1,580)	(6,917)
	Net Density (units per ha)	42.3	28.3	23.5	30.9
	Net Land Need (ha)	35.1	251.3	67.4	224.2
	Net to Gross Ratio	50%	50%	50%	50%
	New Community Area Gross Land Need (ha)	**70.2**	**502.6**	**134.8**	**448.4**

Note: A net density of 30 units per ha translates roughly into lot dimensions of 36' frontage and 100' depth (3,600 sq.ft. area).

5. Employment Area Land Needs Assessment

The Employment Area land needs assessment relies on the employment forecasts contained in Schedule 3 of the Growth Plan to determine the forecasted numbers of jobs by land use category. The approach for determining Employment Area land needs follows the six-step approach set out in the Provincial LNA Methodology (see Figure 26). These steps are discussed in greater detail in the following sections.

Figure 26: Steps for Determining Employment Area Land Needs



A. Step 1 – Historical and Forecast Employment

Table 20 provides the forecast total employment for the County of Simcoe, historically and for the period to 2051. The employment growth is also compared to the population growth and an activity rate is calculated. Simcoe's activity rate is anticipated to increase throughout the 2021-2051 planning period as employment grows at a faster rate than the population. At the time of the 2016 Census the County's employment was 116,550. The Schedule 3 forecast shows the County's population to be 197,940 by 2051. This represents growth of 81,390 over the 30 year period 2021 to 2051 at a compound annual growth rate of 1.8%. This growth rate is lower than the historical rate from 1991-2021 of 2.2%. However, as with the population, the amount of growth is considerable in light of recent growth fluctuations.

Table 20 – Historical and Forecast Employment in Simcoe

Census Year	Total Employment	Employment Growth	Annual Growth Rate	Census Population	Activity Rate
1986	53,540			165,910	32.3%
1991	60,420	6,880	2.4%	200,030	30.2%
1996	76,390	15,970	4.8%	222,830	34.3%
2001	86,370	9,980	2.5%	243,080	35.5%
2006	97,610	11,240	2.5%	262,050	37.2%
2011	97,620	10	0.0%	279,410	34.9%
2016	110,120	12,500	2.4%	305,520	36.0%
2021	**116,550**	**6,430**	**1.1%**	**350,290**	**33.3%**
2026	129,310	12,760	2.1%	384,260	33.7%
2031	140,910	11,600	1.7%	417,850	33.7%
2036	154,190	13,280	1.8%	450,880	34.2%
2041	167,330	13,140	1.6%	481,070	34.8%
2046	183,690	16,360	1.9%	510,320	36.0%
2051	197,940	14,250	1.5%	539,010	36.7%
1991-2021		**56,130**	**2.2%**		
2021-2051		**81,390**	**1.8%**		

Source: Hemson Consulting

Tables 20 and 21 show the forecast employment growth by employment land use category over the historical period from 1986-2016 and the forecast period from 2021-2051. About 50% of all employment growth will be population related; the distribution of this type of employment will generally mirror population growth. Major office employment (4% of total employment) will be concentrated in Innisfil while rural employment (also 4% of total employment) will be scattered throughout the rural area, consistent with historical trends. Employment land employment, accounting for 42% of future growth, will generally be accommodated on lands designated for the exclusive use of employment activity (Employment Area). The development of such land will be critical to the economic prosperity of the County and its success in achieving complete communities. An assessment of the market and site selection needs of such land users is provided in Appendix C.

Table 21 – Forecast Employment by Land Use Type in Simcoe

Census Year	Major Office	Population Related	Employment Land	Rural	Total
2001	1,180	44,830	13,890	26,490	86,390
2006	1,200	47,750	21,910	26,750	97,610
2011	1,220	51,090	18,280	27,020	97,610
2016	1,250	56,620	24,950	27,300	110,120
2021	**1,270**	**63,120**	**24,660**	**27,500**	**116,550**
2026	1,270	71,160	28,710	28,170	129,310
2031	1,270	78,840	31,860	28,940	140,910
2036	1,890	85,070	37,510	29,720	154,190
2041	2,760	90,770	43,470	30,340	167,340
2046	3,480	97,210	52,350	30,650	183,690
2051	4,360	103,660	58,990	30,930	197,940
2021-2051	**3,090**	**40,540**	**34,330**	**3,430**	**81,390**

Source: Hemson Consulting

Table 22 – Share of Forecast Employment by Land Use Type in Simcoe

Census Year	Major Office	Population Related	Employment Land	Rural	Total
2001	1%	52%	16%	31%	100%
2006	1%	49%	22%	27%	100%
2011	1%	52%	19%	28%	100%
2016	1%	51%	23%	25%	100%
2021	**1%**	**54%**	**21%**	**24%**	**100%**
2026	1%	55%	22%	22%	100%
2031	1%	56%	23%	21%	100%
2036	1%	55%	24%	19%	100%
2041	2%	54%	26%	18%	100%
2046	2%	53%	28%	17%	100%
2051	2%	52%	30%	16%	100%
2021-2051	**4%**	**50%**	**42%**	**4%**	**100%**

Source: Hemson Consulting

B. STEP 2 – EMPLOYMENT ALLOCATION

The allocation of employment to the lower-tier municipalities depends largely on the land need identified for Employment Areas and on the population allocation from the Community Area land needs assessment. The allocation to the lower-tier municipalities is not required for the land needs assessment; however, Tables 23 and 24 below show the allocation of employment growth over the 2021-2051 period.

Appendix D provides additional details on the employment allocation by category for each of the lower-tier municipalities.

Table 23 – Total Employment Allocation in Simcoe (jobs)

Municipality	2021	2051	2021-51	2021-51
Adjala-Tosorontio	2,130	2,490	360	0.4%
Bradford West Gwillimbury	11,810	28,310	16,500	20.3%
Essa	9,630	13,090	3,460	4.3%
Innisfil	9,980	30,270	20,290	24.9%
New Tecumseth	20,750	31,620	10,870	13.4%
Clearview	4,350	6,290	1,940	2.4%
Collingwood	12,260	19,600	7,340	9.0%
Midland	10,760	13,170	2,410	3.0%
Oro-Medonte	5,900	11,410	5,510	6.8%
Penetanguishene	4,830	5,970	1,140	1.4%
Ramara	5,380	7,420	2,040	2.5%
Severn	4,020	5,640	1,620	2.0%
Springwater	6,700	9,190	2,490	3.1%
Tay	1,570	2,610	1,040	1.3%
Tiny	1,570	2,390	820	1.0%
Wasaga Beach	4,960	8,510	3,550	4.4%
Southern RMA	**54,300**	**105,780**	**51,480**	**63.3%**
Northern RMA	**62,300**	**92,200**	**29,900**	**36.7%**
Simcoe County	**116,600**	**197,980**	**81,380**	**100.0%**

Source: Hemson Consulting

Table 24 – Employment Land Employment Allocation in Simcoe (jobs)

Municipality	2021	2051	2021-51	2021-51
Adjala-Tosorontio	60	170	110	0.3%
Bradford West Gwillimbury	660	6,710	6,050	17.6%
Essa	690	1,290	600	1.7%
Innisfil	1,270	9,240	7,970	23.2%
New Tecumseth	10,550	14,930	4,380	12.8%
Clearview	390	1,190	800	2.3%
Collingwood	3,910	8,210	4,300	12.5%
Midland	3,520	4,760	1,240	3.6%
Oro-Medonte	1,110	5,370	4,260	12.4%
Penetanguishene	990	1,130	140	0.4%
Ramara	330	1,300	970	2.8%
Severn	240	1,310	1,070	3.1%
Springwater	610	1,710	1,100	3.2%
Tay	50	280	230	0.7%
Tiny	30	30	0	0.0%
Wasaga Beach	230	1,350	1,120	3.3%
Southern RMA	**13,230**	**32,340**	**19,110**	**55.6%**
Northern RMA	**11,410**	**26,640**	**15,230**	**44.4%**
Simcoe County	**24,640**	**58,980**	**34,340**	**100.0%**

Source: Hemson Consulting

C. STEP 3 – EXISTING EMPLOYMENT AREA POTENTIAL

This step estimates the employment potential on existing land designated as Employment Area. The estimate begins with an inventory of Employment Area lands, both occupied and vacant. Recently approved MZOs for employment uses are treated as part of the supply.[13]

Several adjustments are made to account for vacant parcels not yet subdivided and long-term vacancy (including the need to ensure suitable market choice over the long-term). The adjustments made are as follows:

- The vacant supply in areas that are unlikely to develop within the 30 year timeframe because they are undevelopable (e.g. legacy designations within natural heritage

[13] The RVH South Campus Hospital in Innisfil (assumed to develop in three phases: Health Hub in 2027-28; in-patient facility in 2032-33; and hospital in 2037-38), and Medical Innovation Park (33 hectares) and Automotive Innovation Park (40 hectares) in Oro-Medonte.

systems) or are clearly unviable and have been vacant for many years have been removed from the supply.

- The vacant supply in areas is subject net to gross ratio to account for local roads, local stormwater management facilities, and other utilities in Employment Areas. This ensures that the land need is on a common comparable basis in net hectares. The net to gross ratio varies from place to place depending on the size and configuration of the area and the parcel fabric. A standard 85% net to gross adjustment is used for land parcels greater than 5 hectares.

- Over and above the net to gross adjustment, a factor of 15% is applied for long-term vacancy and as a contingency for market choice. Long-term vacancy accounts for individual parcels that do not develop usually due to challenging access or configuration or are regular parcels that are never brought to market or never sold to an end user (typically about 3% of total occupied and vacant lands). The contingency for market choice is included in order to ensure a suitable range and size of sites throughout the period to 2051 so that there is a sufficient supply of large parcels to accommodate land extensive uses and strategic investment sites.

The demand for Employment Area land is based on the growth in employment land employment in the County from the 2021 base year to 2051: 19,110 jobs for the Southern RMA and 15,230 jobs for the Northern RMA as shown in Table 24. These are the employment figures that need to be accommodated on lands in Employment Areas in each regional market area. The demand is attributed to the vacant supply in each regional market area, including Strategic Settlement Employment Areas (in Innisfil and Bradford West Gwillimbury) and Economic Employment Districts (in Oro-Medonte and Ramara, recognizing the latter is primarily zoned for commercial uses) up to full development of those lands. A map showing the location of vacant supply is shown below in Figure 27. Any excess employment land employment that cannot be accommodated becomes the basis for employment land need.

A density of 20 employees per net hectare, somewhat higher than the density of 15.5 employees per net hectare on existing Employment Areas, is assumed for development on vacant lands. The Employment Densities Analysis Report (see Appendix C) supports the general notion of higher densities moving forward and the large strategic employment areas located in Simcoe along Highway 400 are considered to be similar to employment lands along 400 series highways in the Regions of Halton, Peel, and York, where more intense land uses than what exists in Simcoe are observed.

Figure 36 – Map Showing Location of Vacant Employment Areas in Simcoe

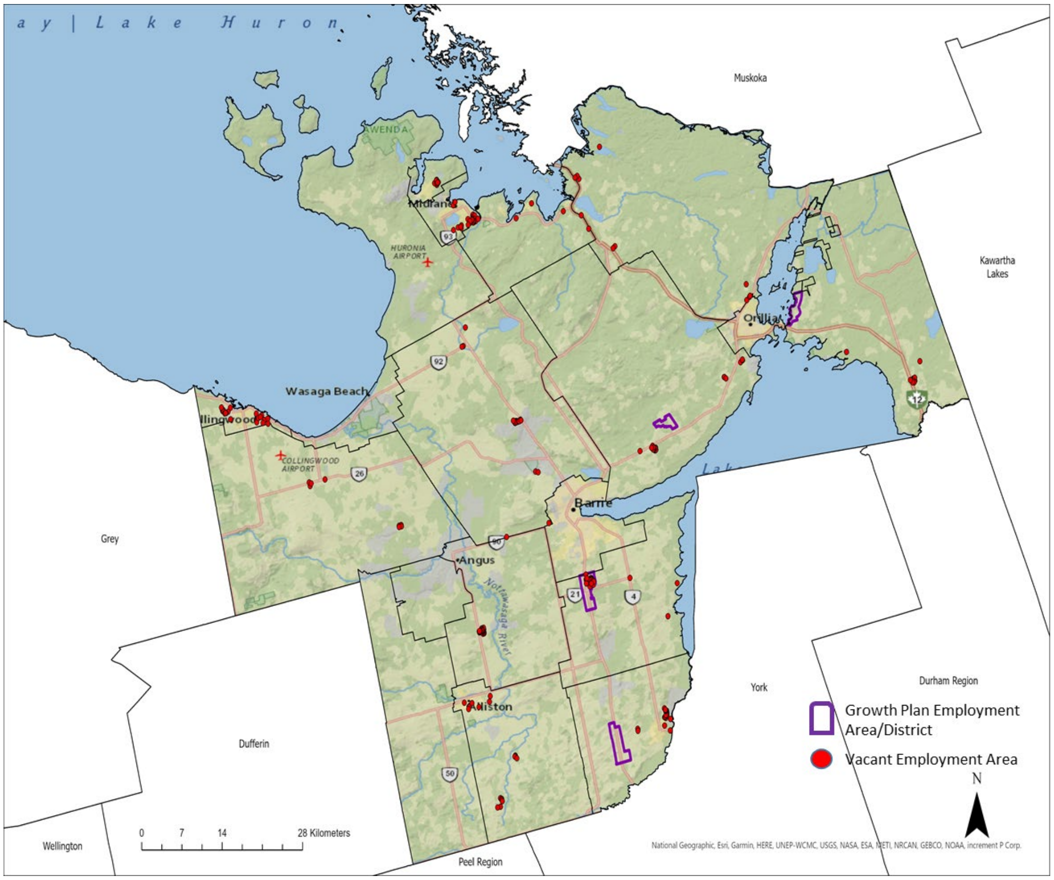


Table 25 shows that the developable Employment Area supply in the County is 1,892.9 hectares, which translates into 1,331.7 hectares of net land area (i.e. less lands for public use, long-term vacancy, and market contingency). At an assumed density of 20 employees per net hectare these lands can accommodate 26,634 jobs, or 7,706 fewer jobs than are being forecast to 2051. There is therefore a need for additional 500.9 hectares of Employment Area on a County Wide basis.

When looking at the regional market area scale:

- The Southern RMA requires an additional 177.4 hectares of Employment Area in order to accommodate 2,730 jobs.
- The Northern RMA requires an additional 323.4 hectares of Employment Area in order to accommodate 4,976 jobs.

Table 25 –Employment Area Land Need by Regional Market Area

Employment Land Employment	Southern RMA	Northern RMA	Simcoe County
Growth 2021-51	19,110	15,230	34,340
Developable land supply (ha)	1,207.8	685.0	1,892.9
Less net to gross (ha)	265.9	95.4	361.4
Less long-term vacancy (ha)	122.9	76.9	199.8
Net Land Area (ha)	**819.0**	**512.7**	**1,331.7**
Density (jobs/net ha)	20	20	20
Employment Land job capacity (jobs)	16,380	10,254	26,634
Sufficiency of Employment Area (jobs)	**(2,730)**	**(4,976)**	**(7,706)**
Employment Area land need (net ha)	136.5	248.8	385.3
Employment Area land need (gross ha)	**177.4**	**323.4**	**500.9**

Source: Hemson Consulting Ltd

D. STEP 4 – NEED FOR ADDITIONAL LAND

The Southern RMA additional Employment Area land need of 177.4 hectares has been allocated to New Tecumseth, mainly in order to ensure that its employment land employment growth of 4,380 jobs is commensurate with its population growth to 2051 (see Table 26). Employment land employment growth in Innisfil and Bradford West Gwillimbury (7,970 and 6,040 respectively) will largely be accommodated on the Strategic Settlement Employment Areas adjacent to Highway 400. Like Innisfil and Bradford West Gwillimbury, Essa will require all of its current Employment Area supply to accommodate its forecast employment land employment growth of 600 jobs.

In the Northern RMA, most municipalities will require all of their current Employment Area supply to accommodate their employment land employment growth allocation. Additional Employment Area lands will be required in:

- Collingwood, which requires 210.8 hectares in order to accommodate 4,409 jobs. It is assumed that the Town will be able to designate a significant portion of its 364 hectares of land designated as "not for urban uses" within its settlement area boundary for Employment Area uses.
- Clearview, which requires 38.7 hectares in order to accommodate 801 jobs.
- Wasaga Beach, which requires 72.7 hectares in order to accommodate 1,109 jobs. This is premised on the Town's plans to convert lands within its settlement area boundary for Employment Area uses.

The Regional Market Areas will need to be identified in the new County Official Plan. The precise location and configuration of the additional Employment Area lands in the Northern and Southern RMAs will be addressed in the next phase of the MCR.

Table 26 - Employment Land Need by Lower-Tier Municipality in the Southern RMA

Employment Land Employment	Southern RMA	Adjala-Tosorontio	Bradford West Gwillimbury	Essa	Innisfil	New Tecumseth
Employment Growth 2021-51	19,110	110	6,040	600	7,970	4,380
Developable Land Supply (Gross ha)	1,207.8	0.0	416.3	35.4	644.1	112.0
Less Net to Gross	265.9	0.0	68.6	0.8	185.8	10.7
Less Long-term vacancy	122.9	0.0	45.3	4.5	59.8	13.2
Net Land Area	**819.0**	**0.0**	**302.3**	**30.1**	**398.6**	**88.1**
Estimated Density	20	20	20	20	20	20
Employment Land Job Capacity	16,380	0	6,046	601	7,972	1,762
Sufficiency of Employment Land (Jobs)	(2,730)	(110)	6	1	2	(2,618)
Developable Land Need (Gross ha)	**177.4**	**7.2**	**0.0**	**0.0**	**0.0**	**170.2**

Source: Hemson Consulting

Table 27 - Employment Land Need by Lower-Tier Municipality in the Northern RMA

Employment Land Employment	Northern RMA	Clearview	Collingwood	Midland	Oro-Medonte	Penetangushine	Ramara	Severn	Springwater	Tay	Tiny	Wasaga Beach
Employment Growth 2021-51	15,230	801	4,409	1,239	4,150	134	971	1,066	1,101	229	0	1,119
Developable Land Supply (Gross ha)	685.0	12.8	72.3	78.4	298.2	7.8	62.5	68.0	70.4	14.7	0.0	0.0
Less Net to Gross	95.4	1.0	5.3	7.2	59.6	0.2	6.7	7.0	6.9	1.6	0.0	0.0
Less Long-term vacancy	76.9	1.5	8.7	9.3	31.1	1.0	7.3	8.0	8.3	1.7	0.0	0.0
Net Land Area	**512.7**	**10.3**	**58.3**	**61.9**	**207.5**	**6.6**	**48.5**	**53.0**	**55.2**	**11.3**	**0.0**	**0.0**
Estimated Density	20	20	20	20	20	20	20	20	20	20	20	20
Employment Land Job Capacity	10,254	206	1,166	1,239	4,150	132	971	1,061	1,103	227	0	0
Sufficiency of Employment Land (Jobs)	(4,976)	(595)	(3,243)	(1)	(0)	(2)	(0)	(5)	3	(2)	0	(1,119)
Developable Land Need (Gross ha)	**323.4**	**38.7**	**210.8**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**72.7**

Source: Hemson Consulting

6. CONCLUSION

This Growth Forecast and Land Needs Assessment Report has been prepared as background research for the County of Simcoe's Municipal Comprehensive Review. The report establishes the long-term growth outlook for the County based on a 30 year time horizon and population and employment forecasts prescribed by the Provincial Growth Plan for the Greater Golden Horseshoe (the Growth Plan). It also determines the amount of urban land required to accommodate the growth outlook using an approach that divides the County into a Southern Regional Market Area and a Northern Regional Market Area.

The two Regional Market Area approach is consistent with historical growth patterns in Simcoe, the Provincial policy framework as set out in the Provincial Policy Statement and Growth Plan, the needs of the local real estate market for housing and employment lands, the location of Provincial transit investments, local municipal growth plans, and good planning principles.

The County's population will grow by 194,000, from 361,000 in 2021 to 555,000 in 2051. This represents a significant amount of growth over the next 30 years. Most growth will be generated by in-migration from the Greater Toronto Area.

About 63% of all population growth is forecast to occur in the Southern Regional Market Area, mainly in the Towns of Innisfil, Bradford West Gwillimbury, and New Tecumseth where significant growth is already taking place. Population growth in the Northern Regional Market Area is forecast to be concentrated in large well established urban centres such as Collingwood, Midland, Penetanguishene, and Wasaga Beach, as well as in municipalities that have advanced plans for development such as Clearview and Springwater.

The County of Simcoe does not require substantial additional Community Area on a County-wide basis to accommodate long-term population growth to 2051 established by Schedule 3 to the Growth Plan. However, the Community Area Land Needs Assessment demonstrates that:

- There is an additional Designated Greenfield Area land need of 1,156 hectares to accommodate growth and meet housing market demand in the Southern Regional Market Area.

- In order to address the additional Southern Regional Market Area land need of 1,156 hectares, new Designated Greenfield Area will be required in Innisfil (70.2 hectares), Bradford West Gwillimbury (502.6 hectares), Essa (134.8 hectares), and New Tecumseth (448.4 hectares).

The County's employment base will grow by 81,000 jobs, from 117,000 in 2021 to 198,000 in 2051. About 7,300 new jobs will require Employment Areas for their activities.

The County requires an additional 500.9 hectares of Employment Area on a County-wide basis to accommodate long-term employment growth to 2051 established by Schedule 3 to the Growth Plan. The Employment Area Land Needs Assessment demonstrates that:

- There is an additional Employment Area need of 177.4 hectares to accommodate employment land employment growth in the Southern Regional Market Area.
- There is an additional Employment Area need of 323.4 hectares to accommodate employment land employment growth in the Northern Regional Market Area.
- In order to address the additional Southern Regional Market Area land need of 177.4 hectares, new Employment Area will be required in New Tecumseth.
- In order to address the additional Northern Regional Market Area land need of 323.4 hectares, new Employment Area will be required in Collingwood (210.8 hectares), Wasaga Beach (72.7 hectares), and Clearview (38.7 hectares).

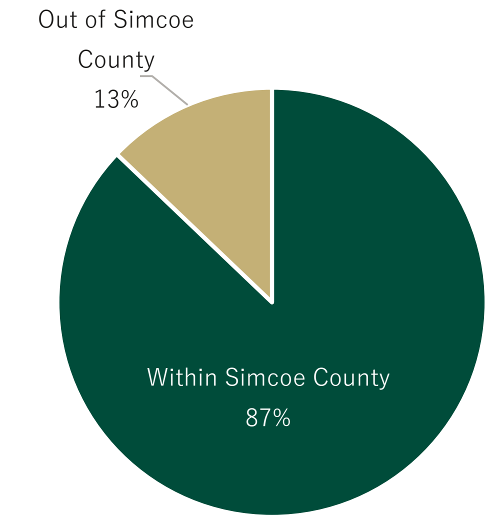
The location and configuration of the additional Community Area lands in the Southern Regional Market Area and Employment Areas in the Northern and Southern Regional Market Areas will be addressed in a subsequent phase of the Municipal Comprehensive Review.

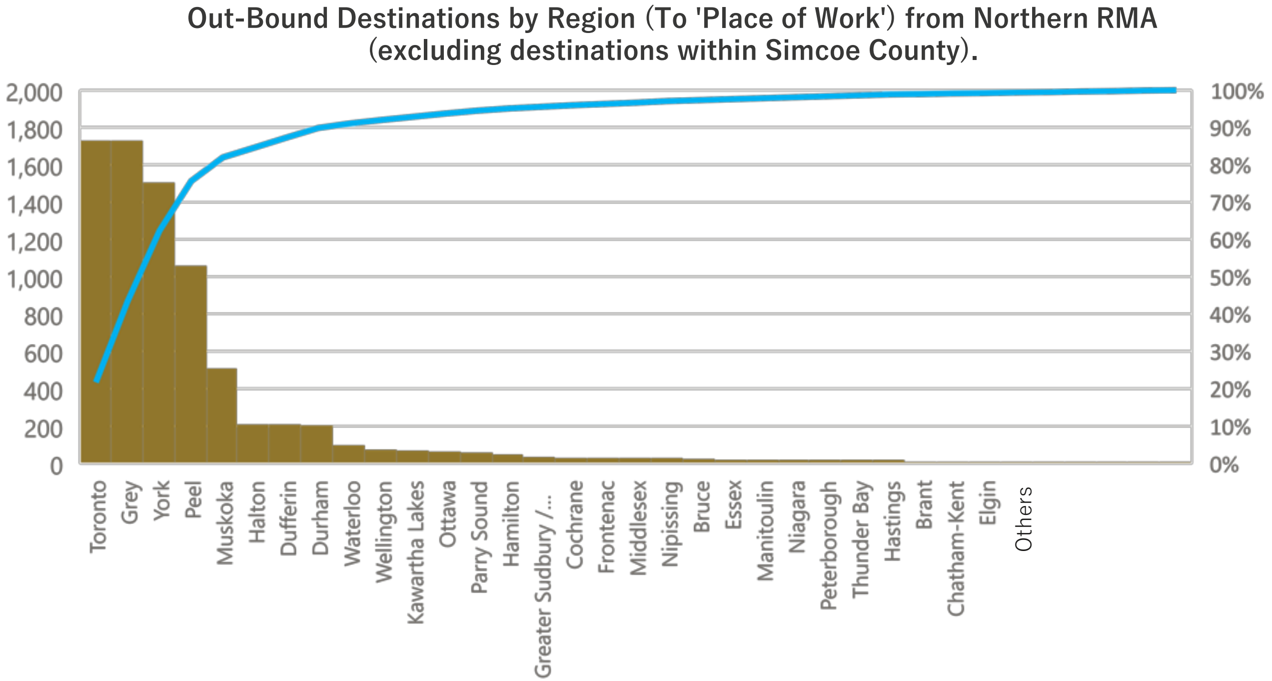
Appendix A

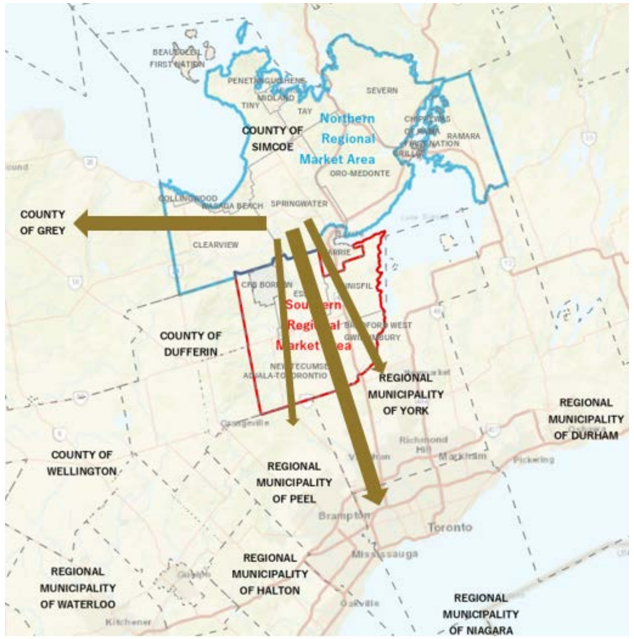
Commuting Analysis Of Northern And Southern Regional Market Areas

Northern Regional Market Area: POR/ POW Commuter Analysis

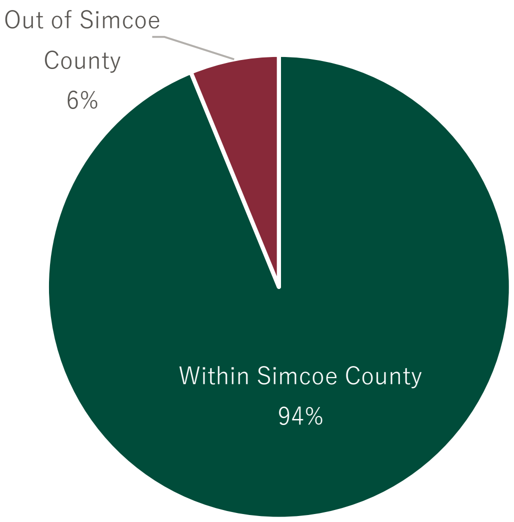
Out Bound

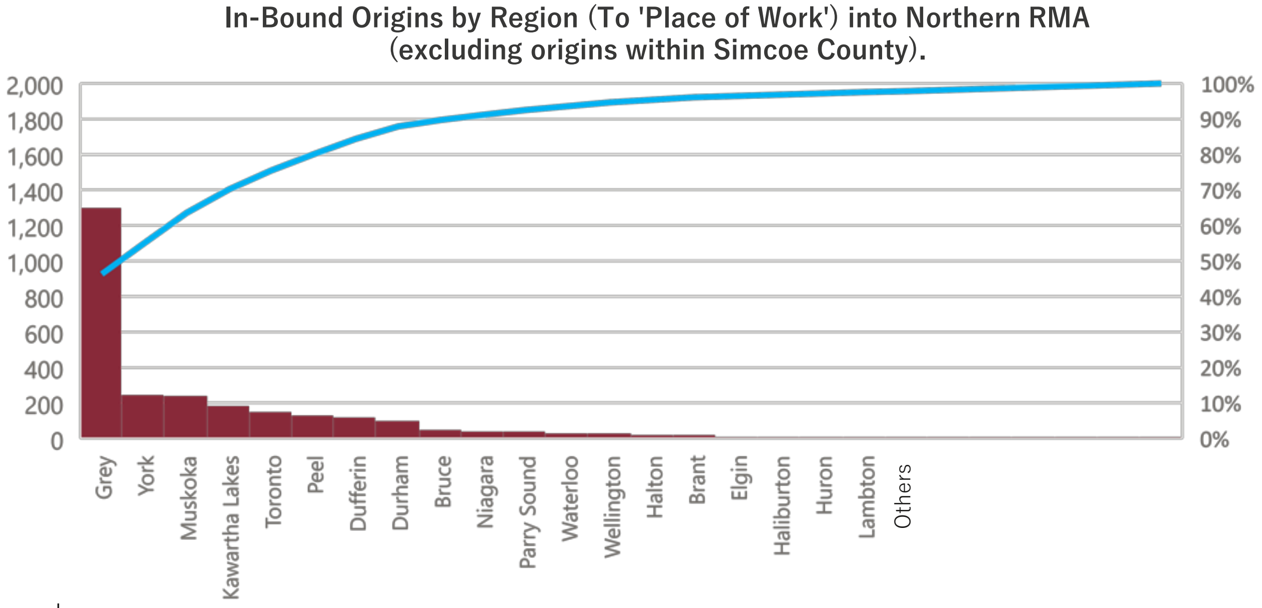


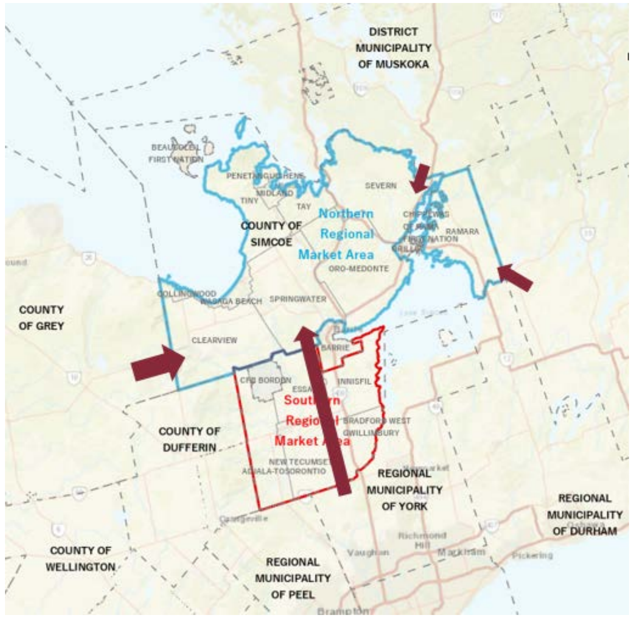




In Bound







Source: Statistics Canada, 2016 Census of Canada

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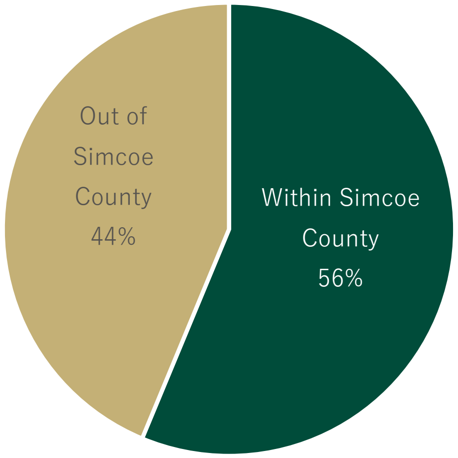
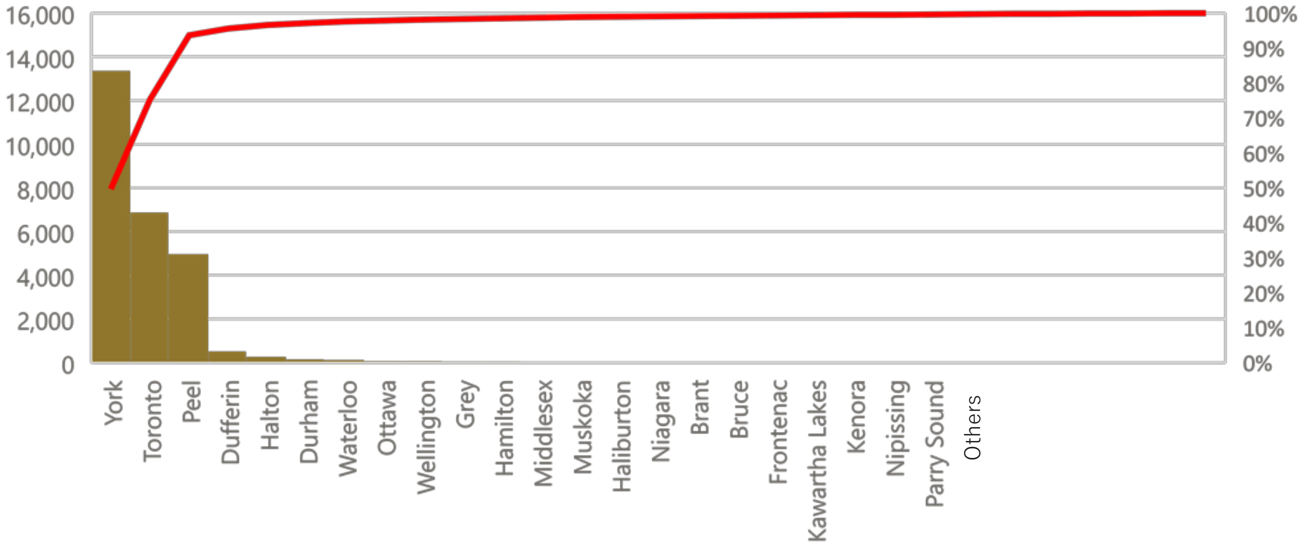
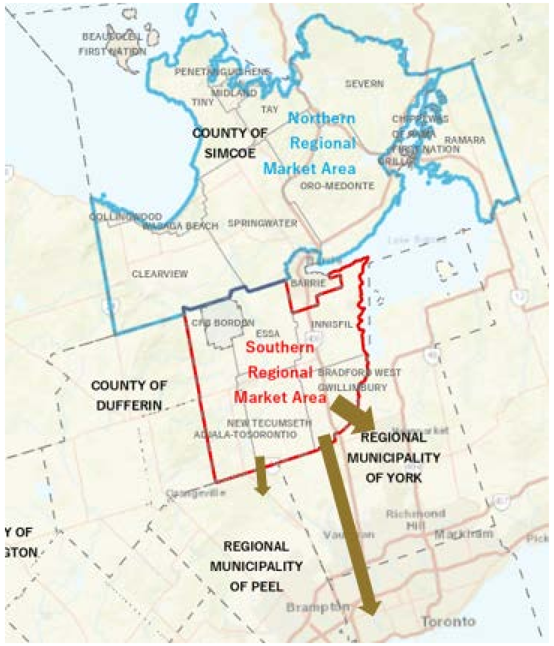
Southern Regional Market Area: POR/ POW Commuter Analysis

Out Bound



Out-Bound Destinations by Region (To 'Place of Work') from Southern RMA (excluding destinations within Simcoe County).





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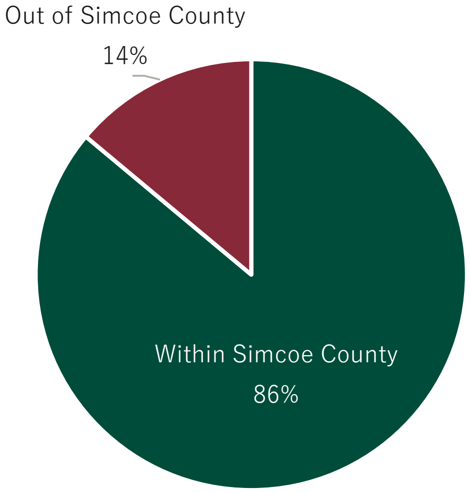
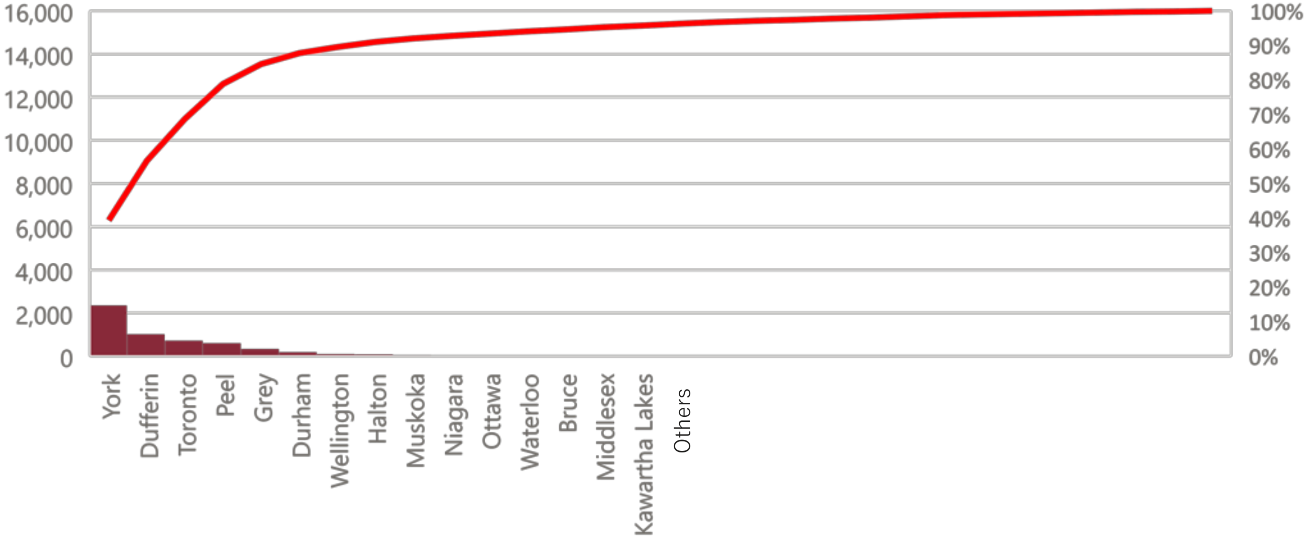
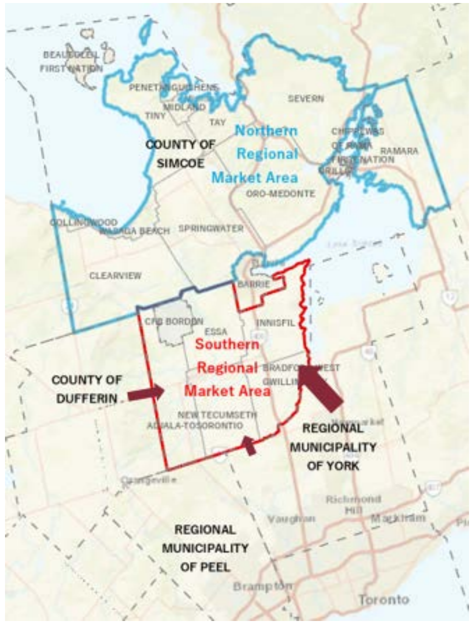


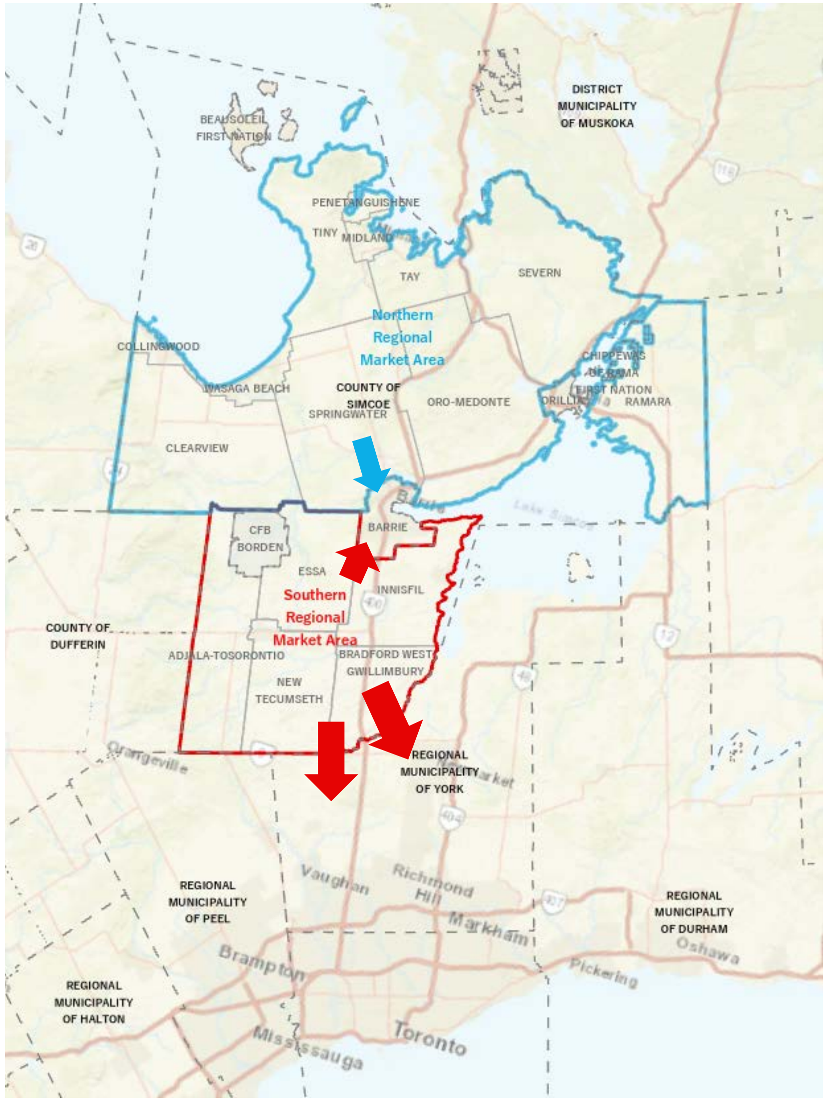
In-Bound Origins by Region (To 'Place of Work') into Southern RMA (excluding origins within Simcoe County).

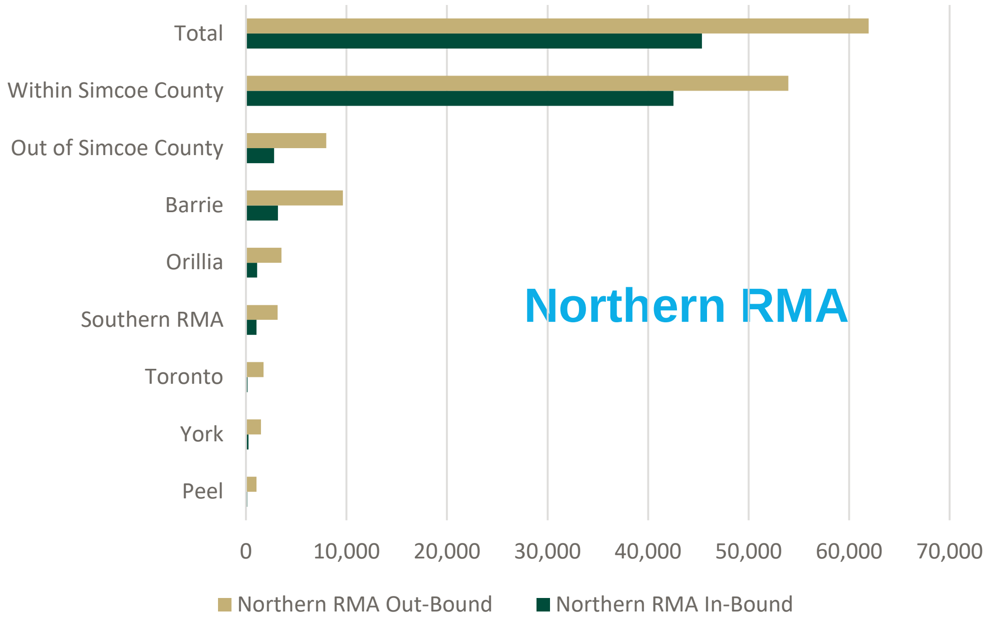


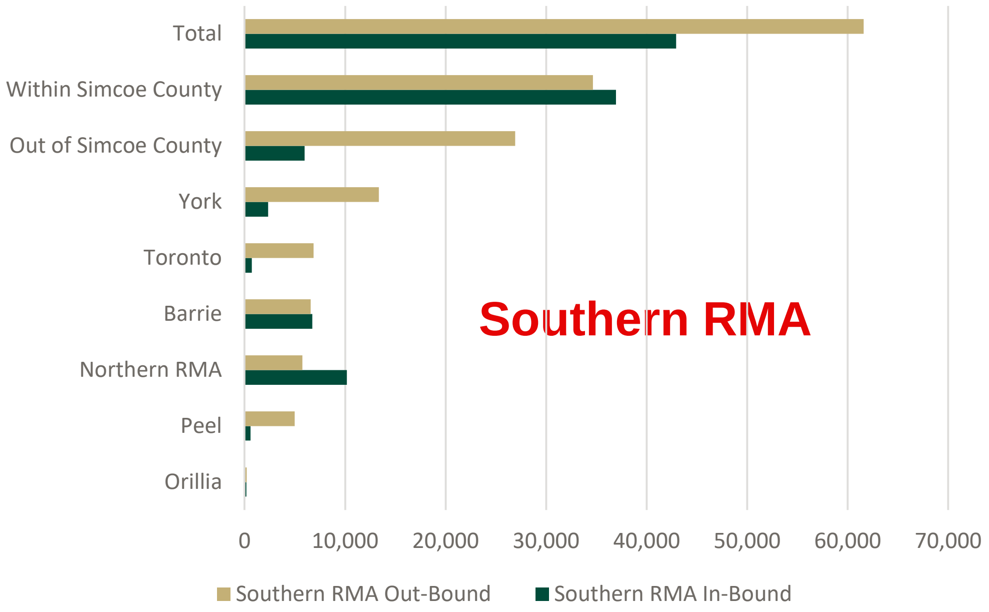


Source: Statistics Canada, 2016 Census

Summary: POR/ POW Commuter Analysis







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APPENDIX B

REAL ESTATE MARKET AND

SITE SELECTION PERSPECTIVES

EMPLOYMENT STRATEGY

REAL ESTATE MARKET AND SITE SELECTION PERSPECTIVES

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March 31, 2022

Stefan Krzeczunowicz
Associate Partner
Hemson Consulting
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Toronto, Ontario
M5T 3A3
Email: stefank@hemson.com

Regarding: **County of Simcoe Employment Strategy – Real Estate Market and Site Selection Perspectives**

Dear Stefan,

Cushman & Wakefield was engaged as a sub-consultant as part of the broader Project Team, led by Hemson Consulting, to execute Simcoe County's Employment Strategy. The purpose of this report is to provide real estate market insights and site selection analysis to guide future land use planning in Simcoe County. The attached report serves as input to the Employment Strategy deliverables. We look forward to discussing this work with you at your convenience.

Respectfully submitted,

Cushman & Wakefield

Andrew Browning
Vice President, Valuation & Advisory
Cushman & Wakefield
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TABLE OF CONTENTS

1.0 INTRODUCTION

1.1 Purpose of the Report and Intended Users

This consulting report has been provided to Hemson Consulting for the purposes of supporting development of an Employment Strategy as part of a Municipal Comprehensive Review for the County of Simcoe. This report provides real estate market insights and site selection analysis to guide future land use planning. This work identifies the preferred locations for employment growth within the County from a real estate market perspective. The County's 16 member municipalities are the focus of this analysis.

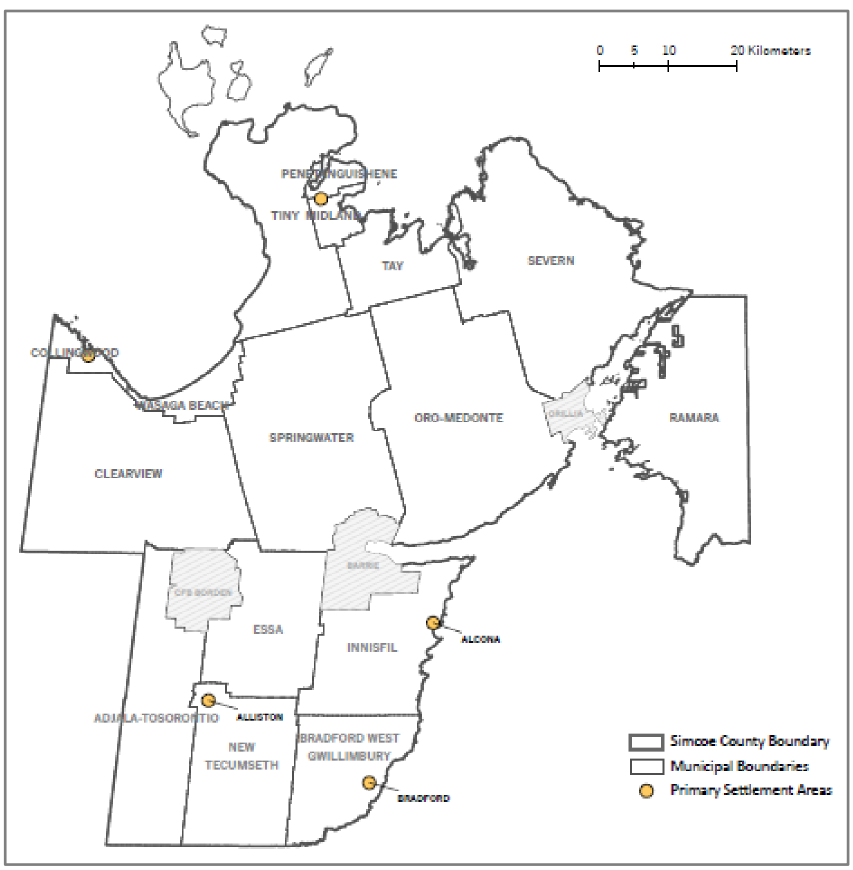
The Intended Users of this report are staff of Hemson Consulting, Simcoe County, and other consultants engaged as part of the Municipal Comprehensive Review project. The material enclosed in this report is intended to be used in whole or in part to assist in the preparation of project deliverables.

1.2 Overview of Municipal Comprehensive Review

1.2.1 Location and County Responsibilities

Simcoe County is an upper-tier municipality located just north of the Greater Toronto Area, to which it is connected by Highway 400. It contains approximately 4,900 hectares of land located around Lake Simcoe, Georgian Bay, the Niagara Escarpment, and the Oak Ridges Moraine. There are 16 lower-tier municipalities within the County, each with a distinct pattern of settlement and growth management plans. The County exhibits a wide range of urban and rural land uses; a diverse economy that includes agricultural, industrial, and tourism-related employment; and a rich natural heritage system. Municipal services such as libraries, paramedics, long-term care, social housing, public works, waste management, and arterial roads infrastructure are generally provided by the County, while lower-tier municipalities are responsible for other local services, including the delivery of water and wastewater infrastructure. Land use planning is closely co-ordinated, with the County being responsible for guiding overall growth and development primarily through its Official Plan, and acting as the approval authority for many planning approvals.

The map at right identifies the County and its lower-tier municipalities, including the existing primary settlement areas.



1.2.2 Growth Plan Requirements

The County is currently undertaking a comprehensive update to its Official Plan (a Municipal Comprehensive Review, or MCR). The update is required to ensure the Official Plan is consistent with provincial policies and conforms with provincial plans. These policies and plans – particularly the *Provincial Policy Statement 2020 (PPS)* and *A Place to Grow – Growth Plan for the Greater Golden Horseshoe (Growth Plan)* – have undergone substantial revision in recent years. Of great importance is that the *Growth Plan* now requires that the County plan for growth over a thirty year time horizon to 2051. Section 6 of the *Growth Plan* includes specific policies for managing growth in the Simcoe Sub-Area, which includes the County and its 16 lower-tier municipalities.

The County is located within the Outer Ring of the Greater Golden Horseshoe (GGH), as defined by the *Growth Plan*. The *Growth Plan* includes detailed policies for planning for future population and employment, and establishing settlement area boundary expansions and official plan reviews. All County Council decisions made in respect of these matters must conform to these policies. As such, the *Growth Plan* is the crucial policy document guiding the Municipal Comprehensive Review.

Growth Plan Schedule 3 requires that the County plan to achieve a minimum population of 555,000 and employment of 198,000 by 2051. This represents population and employment growth of about 55% and 69%, respectively, from today.

SIMCOE COUNTY FORECAST TO 2015		
Year	**Population**	**Employment**
2021	357,000	117,000
2051	555,000	198,000
Growth 2021-2051	**198,000 (55%)**	**81,000 (69%)**

1.2.3 Overview of Simcoe County's Municipal Comprehensive Review Process

Through the MCR, Simcoe's Official Plan will be brought into conformity with the *Growth Plan*. The scale of the work involved is necessarily broad. The updated Official Plan establishes the overall pattern of development and environmental stewardship in the County, and sets the stage for substantial and more detailed planning by local public bodies.

The MCR must be completed by July 2022. It includes a review of Provincial policies and plans, and associated technical studies to support the updated Official Plan policies, on the following matters:

- refinements to the Provincial natural heritage system;
- refinements to the Provincial agricultural system;
- growth management, including a land needs assessment (LNA);
- planning for employment;
- climate change; and,
- watershed planning.

This *Real Estate Market and Site Selection Perspectives* report serves as input to the overall MRC work being undertaken concurrently. The MCR is being closely co-ordinated with the lower-tier municipalities. Lower-tier municipalities will play a key role in identifying appropriate locations for future urban lands, and impacts on the agricultural system, natural heritage system, watersheds, and infrastructure requirements.

Throughout the MCR, the County will engage with a range of stakeholders including the lower-tier municipalities, Indigenous communities, Provincial staff, public agencies, County residents, environmental groups, representatives of the agriculture community, developers, and community associations. The technical studies will be made available to these stakeholders and the general public for review and comment.

2.0 BACKGROUND REVIEW

2.1 Economic Development Strategy 2021-2025

2.1.1 Introduction

Cushman & Wakefield reviewed the County of Simcoe's *Economic Development Strategy 2021-2025* in order to identify areas in which the *Strategy* identifies matters of significance from the perspectives of real estate, land needs, and site selection – which is the focus of our input to the broader Employment Strategy project. The strategic plan update outlines where partners and stakeholders see regional opportunities existing, and what actions the County of Simcoe's Economic Development Office (EDO) can take to support these opportunities. The following provides a summary of key elements from this document (along with page references), and related comments from Cushman & Wakefield.

2.1.2 Geographic Overview

- **Member municipalities** – The County of Simcoe is comprised of 16 member municipalities, and have the separated Cities of Barrie and Orillia, CFB Borden, and two First Nation communities located within the geographic boundaries of the region. (p. 4)
  - *Cushman & Wakefield note: The 16 member municipalities are the focus of this Employment Strategy. The other geographies/entities have varying degrees of influence over employment-related matters in Simcoe County, and will be references as needed.*
- Businesses and talent do not distinctly recognize municipal boundaries, thus taking a regional approach to economic development makes for a stronger economy for all. (p. 11)
  - *Cushman & Wakefield note: Site selection is seldom concerned with a municipal address (other than a "Bay Street" Toronto address for a major bank headquarters); rather, the exercise is about identifying a preferred location among a short list of choices that has been refined based on a broad range of attributes (which will be discussed later in this report).*
- **Four quadrants** – For the purposes of the Strategic Plan, the County has been divided into four quadrants to more accurately reflect market conditions and trends. (p. 12)
- **South Simcoe** – Municipalities in South Simcoe include the Towns of Innisfil, Bradford West Gwillimbury, and New Tecumseth; and Townships of Adjala-Tosorontio and Essa. Due to its proximity to the Greater Toronto Area (GTA), this region is experiencing the most rapid population growth and interest from an investment perspective. New Tecumseth and Bradford West Gwillimbury currently have strength in manufacturing, while Adjala-Tosorontio and Essa are pursuing agricultural sectors, and Innisfil is looking to attract entrepreneurs – particularly from the technology sector. Innisfil and Bradford West Gwillimbury have provincially designated strategic settlement employment areas along the Highway 400 corridor. The Town of New Tecumseth has a provincially significant employment zone in the vicinity of the Honda of Canada Manufacturing facility. Bradford West Gwillimbury, and the broader region, will be able to benefit from the impending development of the 400-404 Connecting Link highway that will be built in the Town. (p. 12)

- **West Simcoe** – Municipalities in West Simcoe include the Townships of Springwater and Clearview; and Towns of Collingwood and Wasaga Beach. Collingwood is pursuing the development of a technology cluster. Clearview and Springwater are focused on the agricultural sector and downtown revitalization. Wasaga Beach, while known for tourism, is looking to pursue future diversification in the economy in appropriate sectors of focus. (p. 12)
- **North Simcoe** – Municipalities in North Simcoe County include the Towns of Midland and Penetanguishene; and Townships of Tay and Tiny. The North Simcoe municipalities have partnered together to develop an economic development corporation to manage related activities for the region. There are four sectors of focus in North Simcoe: manufacturing, agriculture, tourism, and healthcare. (pp. 12-13)
- **East Simcoe** – Municipalities of East Simcoe County include the Townships of Oro-Medonte, Ramara, and Severn. The region is focused on the manufacturing and tourism sectors. East Simcoe collaborates with Rama First Nation and the City of Orillia to support the tourism sector. East Simcoe has two provincially significant employment areas as identified in the *Growth Plan for the Greater Golden Horseshoe.* One is situated along Rama Road in Ramara Township, and is focused on tourism development, while the other is situated in the Township of Oro-Medonte, where lands associated with the Lake Simcoe Regional Airport are designated as an Economic Employment District. (p. 13)
  - *Cushman & Wakefield note: With respect to the four quadrants referenced above, the existing economic and employment base will factor into future land needs decision-making, as growth within established businesses and expansion of the in-place business ecosystems will drive land demand by type of user. These themes will be explored later in this report.*
  - *Cushman & Wakefield note: Hemson's Growth Forecasts and Land Needs Assessment report recognizes fundamental differences in the growth dynamics and settlement patterns between the rapidly growing southern part of the County and the more sparsely populated northern part of the County (notwithstanding several large urban centres in the north) by "splitting" the County into two regional market areas:*
    - *the Northern Regional Market Area (RMA) – comprising the 11 municipalities of Clearview, Collingwood, Midland, Oro-Medonte, Penetanguishene, Ramara, Severn, Springwater, Tay, Tiny, and Wasaga Beach; and,*
    - *the Southern Regional Market Area (RMA) – comprising the five municipalities of Adjala Tosorontio, Bradford West Gwillimbury, Essa, Innisfil, and New Tecumseth.*
- **Cities of Barrie and Orillia** – There are two separated cities located within the geographical boundaries of Simcoe County: Barrie and Orillia. (p. 13)
  - *Cushman & Wakefield note: Barrie and Orillia are not a focus of this report, but will be referred to as required.*

2.1.3 Location, Transportation Infrastructure, and Strategic Employment Areas

- **Strategic location and transportation infrastructure** – Simcoe County's location presents a strategic advantage as being connected to provincial highway 400, and arterial highways 11, 12, 26, 27, 88, and 89 facilitates transport across Canada and to U.S. markets. These highways provide access to a large network of goods, services, and potential customers. A main north-south line of Class 1 railway runs through Simcoe County, and it is also home to a short line railway, the Barrie Collingwood Railway (BCRY), which directly connects into the national line. The County is home to (and 90% shareholder of) the Lake Simcoe Regional Airport – a 24/7 operation with on-site Canada Border Services Agency services for both passengers and freight. Simcoe County has significant shorelines on Lake Simcoe and Georgian Bay, connecting the County to the Great Lakes system, and creating opportunities for business development in tourism and other recreational industries. (pp. 14-15)

- **Strategic economic and employment areas:** *A Place to Grow – The Growth Plan for the Greater Golden Horseshoe* identifies a number of strategic economic and employment areas: Bradford West Gwillimbury Strategic Settlement Employment Area, Alliston Provincially Significant Employment Zone, Innisfil Heights Strategic Settlement Employment Area, Lake Simcoe Regional Airport Economic Employment District, and Rama Road Economic Employment District. (pp. 16-17)
  - *Cushman & Wakefield note: The role and importance of these strategic economic and employment areas will be explored as part of the Municipal Comprehensive Review.*
- **Population distribution and growth:** Within the County, population is most heavily concentrated in South Simcoe, followed by the West, North, and East regions. Between 2011 and 2019, population growth has been most heavily concentrated in the South (29%), with slowest growth in the North (6%). The largest (and fastest growing) portions of the County continue to lie in areas to the South and West, which will have implications for the allocation of services and investment across the County. Growth in the County can also be compared to the two separated cities within the County region, Barrie and Orillia. The City of Barrie grew at a rate of 11% between 2011 and 2019. South, West, and East Simcoe experienced a higher growth rate than the City of Barrie between 2011 and 2019. Conversely, the City of Orillia has grown more slowly than anywhere else in the County over both time periods. (p. 19)
- **Commuting to work:** While North Simcoe retains about 77% of their workforce in the region, West Simcoe retains 51% of their workforce, South Simcoe retains 39% of their workforce, and East Simcoe retains just 16% of their workforce for jobs within their respective regions. (p. 21)

2.1.4 Economic sectors

- **High concentration of employment:** The ranking of the top two location quotients has remained steady over the past six years, and given their strong local concentrations, both manufacturing and tourism warrant important consideration in terms of how to maintain and grow these sectors. The following two sectors exhibit the highest labour force concentration relative to Canada in 2016:
  - Arts, entertainment, and recreation; and,
  - Manufacturing. (p. 23)
- **Average concentration of employment:** Of the 21 major sector groups, 13 show average labour force concentrations, spread across both goods and services-producing sectors. These are as follows:
  - Retail trade;
  - Accommodation and food service;
  - Administrative and support, waste management, and remediation services;
  - Construction;
  - Public administration;
  - Health care and social assistance;
  - Unclassified;
  - Utilities;
  - Other services (except public administration);
  - Wholesale trade;
  - Education services;
  - Real estate and rental and leasing; and,
  - Agriculture, forestry, fishing, and hunting. (p. 23)

- **Low concentration of employment:** Six sectors had low location quotients in the County. Except for Mining and oil and gas extraction – for which there is little to no resource base to support employment in the region – those sectors were:
  - Professional, scientific, and technical service;
  - Information and cultural industries;
  - Transportation and warehousing;
  - Finance and insurance; and,
  - Management of companies and enterprises. (p. 23)
- **Highest job growth:** From 2013-2018, the sectors which experienced the highest growth of jobs in the County are:
  - Accommodation and Food Services (Increase of 3,835 workers or 26%);
  - Health care and social assistance (Increase of 4,277 workers or 18%);
  - Construction (Increase of 2,488 workers or 16%);
  - Educational Services (Increase of 1,617 workers or 13%); and,
  - Professional; scientific and technical services (Increase of 1,073 workers or 11%). (p. 24)
- **Lowest job growth:** From 2013-2018, the sectors which experienced the most significant job declines are:
  - Management of Companies and Enterprises (Decrease of 108 workers or 25%);
  - Agriculture; Forestry; Fishing and Hunting (Decrease of 895 workers or 21%); and,
  - Transportation and Warehousing (Decrease of 739 workers or 10%). (p. 24)
- **Sectors of interest:** Through both the location quotient and growth analysis, as well as considering feedback from key stakeholder interviews, the EDO has identified several sectors of interest to help sustain, grow, or explore. These sectors include manufacturing; tourism (arts, entertainment, and recreation; and accommodation and food service); professional, scientific, and technical services; and the agricultural sector. (pp. 24-25)
  - *Cushman & Wakefield note: Ensuring a suitable supply of employment lands to accommodate the economic sectors that will be leading drivers of employment growth and identified sectors of interest in Simcoe County over the coming decades is a primary objective of this Employment Strategy and related Land Needs Analysis.*
  - Manufacturing: Manufacturing was one of the region's largest employers in 2018, with approximately 23,259 employees. While a major employer, the sector only realized about 1% growth over the past five years. Several areas of interest within the manufacturing sector were identified by Simcoe County stakeholders. These included aerospace, automotive, health and wellness, food and beverage, and cleantech. (p. 26)
  - Tourism: Employment in the arts, entertainment, and recreation; and accommodation and food services sectors, totaled 24,980, or 11% of the workforce employed in a classified industry sector in 2018, making it a significant regional employer – although not all of these jobs may have a direct link to tourism. (p. 28)
  - Professional, Scientific, and Technical Services: While not a top employer in the region with 10,928 jobs and a location quotient of 0.70, the professional, scientific, and technical services sector has experienced a moderate 11% job growth over the last five years. Several stakeholders have highlighted this as a potential area of diversification. (p. 28)
  - Agriculture: The agricultural sector has a rich history in Simcoe County, and remains a sector of focus for a number of the County's smaller, more rural municipalities. That being said, in the past five years, the farms sub-sector has lost approximately 23% of its workforce. Stakeholder interviews indicated the biggest opportunity for the growth of the sector is linked to value-added production and agri-tourism. (p. 29)

- *Cushman & Wakefield note: From the perspective of this Employment Strategy, the specific land needs of each of these sectors is of importance – as well as their site selection preferences.*
  - » *Manufacturing is tied to industrial land and buildings.*
  - » *Tourism is associated with a need for retail-commercial lands to support accommodation and food services, and related tourism activities, often in mixed-use areas.*
  - » *Professional, scientific, and technical services jobs are often aligned with office space requirements, and can also be found in industrial and flex-industrial settings (flex-industrial referring to industrial buildings with a greater extent of office build-out compared to traditional industrial premises).*
  - » *Agricultural production is associated with rural lands – although value-added production and agri-tourism may generate demand for on-farm development permissions, or farm-adjacent employment lands for related uses.*

2.1.5 Key Regional Assets

- **Lake Simcoe Regional Airport** – The Lake Simcoe Regional Airport (LSRA) is a regional strategic economic development asset. It is centrally located in the Township of Oro-Medonte, with easy access to provincial highways. The LSRA has a total land area of approximately 245 hectares (605 acres). This includes 58 hectares (142 acres) of serviced and un-serviced land available for airside commercial development opportunities, and a further 24 hectares (60 acres) available for non-aviation development. The LSRA is serviced by Canada Border Services Agency and maintains Commercial Port-of-Entry status for both people and goods. Several key stakeholders identified the LSRA as a regional opportunity, and one that can drive the attraction of new investment, facilitate ongoing business development, and potentially bring in tourism opportunities. (p. 30)
- **Georgian College** – Georgian College has four locations within the geographic region of Simcoe County, including campuses in Barrie, Orillia, Collingwood, and Midland. The College offers over 130-degree, diploma, or certificate programs, including four degree-diploma programs in partnership with Lakehead University, and a continuing education program equipped to develop custom training. Georgian's seven campuses play host to over 13,000 full-time students, including more than 3,600 international students. (p. 31)
- **Lakehead University** – Lakehead University is based in Thunder Bay, Ontario; however, the University host a satellite campus in Orillia. This campus is home to over 1,450 students, split between four academic areas of focus: business, arts and science, education, and social work. (p. 33)

2.1.6 Regional Issues

- Interviews with key stakeholders and surveys with the business community highlighted some specific regional opportunities and challenges that are currently being faced, including access to talent, investment attraction, business development, entrepreneurship and innovation, and regional economic development leadership. (p. 34)
  - *Cushman & Wakefield note: Some of these issues – such as those related to labour attraction/retention and housing issues – are outside the scope of this Employment Strategy. The following section identifies issues of significance from a real estate and site selection perspective.*

- **Investment attraction** – Specific challenges that were mentioned in stakeholder interviews related to attracting and retaining investment included a lack of infrastructure and challenges with planning red tape. Challenges such as basic land servicing, and access to high speed and affordable internet were brought up as the most often-cited missing pieces. 19% of business indicated they needed internet and general infrastructure as resources to help them grow, 11% cited internet and infrastructure as a top three barrier to growth, and 16% as a top 3 disadvantage to doing business in the region. The challenges relating to planning were numerous, including:
    - General red tape comments;
    - Inconsistency between zoning by-laws;
    - Outdated zoning by-laws;
    - Decision making that is not consistent with community goals;
    - Long process that is impacted by nimbyism/disconnection;
    - Disconnection between planning and economic development; and,
    - Lengthy municipal processes to get new or expansion development approved.

  Some interviewees also suggested there was an opportunity for the County to explore taking on the servicing of the land themselves, or to work with their municipal partners to develop innovative servicing models. In terms of planning, many stakeholders suggested the County could play a role in working with planning to harmonize and modernize the zoning by-laws to facilitate development and align with community goals. It was hoped that the EDO could generally advocate for a more harmonious relationship between economic development and planning stakeholders. Several municipalities noted that they had an on-going Community Improvement Program (CIP) to facilitate investment in key areas, and they would like to see the County match Development Charge Abatement on commercial properties or explore how to complement existing CIPs. Interviewees also noted they would like some support in creating/undertaking CIPs in their municipalities. (pp. 37-38)

  Available employment land: Further compounding the investment attraction challenges is a general lack of available employment land, as the County has very low industrial and commercial vacancy rates and little greenfield, serviced, and available land for sale. 25% of interviewees specifically mentioned this as a significant economic development issue for the region. Land that was zoned industrial but had high servicing costs was noted as one of the key bottlenecks to selling land. Industrial landowners who have no interest in selling the land in the short term was identified as the other major barrier in terms of available employment lands in the region. Stakeholders identified opportunities for the EDO to advocate for more zoning allocation of industrial land, working with property owners to support them in selling their industrially-zoned lands, and potentially playing a role in servicing some of the land. (pp. 38-39)
- *Cushman & Wakefield note: A land supply and demand analysis is a key input to this Municipal Comprehensive Review.*

2.1.7 Economic Development Strategy – Vision, Goals, and Objectives

The *Economic Development Strategy 2021-2025* concludes with a vision for sustainable growth, and a set of goals and objectives. Again, from the perspective of real estate markets and site selection, the goals and objectives noted below are cited due to their particular relevance to this Employment Strategy.

Goal 1: Simcoe County will be recognized as a premier destination for investment in Ontario

− Simcoe County is in a strategic location with available industrial land, commercial property, and a growing population. It is a community positioned for continued economic growth, and is looked upon as a premier destination for investment. The County will work to create the tools and brand to ensure investment opportunities across the identified sectors understand the regional value proposition.

Objective 1 – Build awareness of Simcoe County's value proposition to investment prospects

− Maintain up-to-date land and building inventory, and engage with real estate associations, site selectors, provincial representatives, and developers to promote investment opportunities.

Objective 2 – Be a leader in coordinating regional investment attraction activities and events

− Refine Simcoe County's economic development brand to reflect its strategic location in proximity to the GTA, quality of life, strong business development assets, and thriving business community.

Objective 3 – Work with partners to promote and leverage key regional assets and opportunities

− Recognize strategic regional assets in investment materials.

− Help existing businesses and new investors understand the opportunities available to them through key regional assets. (pp. 59-62)

- **Goal 5: Advocate for and support the delivery of infrastructure to meet the needs of a competitive business community**

− Simcoe County must, on an ongoing basis, strategically advocate for, invest in, and maintain its regional economic development infrastructure assets. These assets, such as roads, airports, rail, electricity, natural gas, and internet, form the basis of the infrastructure needed to operate a business. In particular, the EDO will need to address the servicing challenge for its existing employment lands and fundamentally increase the amount of property for sale if future industrial investment attraction efforts are to be successful. The EDO also needs to ensure high speed internet is highly accessible, as this will be critical for business to remain competitive. The EDO will ensure that its existing business community and prospects understand how to best leverage Simcoe County's infrastructure assets.

Objective 1 – Expand the capacity and connectivity of the Lake Simcoe Regional Airport

− Support the implementation of the LSRA Strategic Plan.

− Explore the Provincial Site Certification Program for LSRA employment lands.

Objective 2 – Increase the supply of shovel-ready employment lands

− Provide a strategic economic development lens to complete the Municipal Comprehensive Review in support of shovel-ready employment land needs of the business community.

− Work with municipal partners to explore tactics to facilitate the development of employment land to be shovel-ready.

− Protect employment land for future industrial uses.

Objective 3 – Play a significant role working with stakeholders and advocating to other levels of government regarding the need to support and enhance infrastructure and transportation networks to facilitate development

− Work with municipal partners to identify infrastructure gaps hindering business development, and engage in and support advocacy opportunities.

− Identify and support relevant funding opportunities. (pp. 73-75)

2.2 Simcoe County Community Profile 2021

2.2.1 Introduction

Cushman & Wakefield reviewed the County of Simcoe's *Community Profile* for 2021. The following are some notable observations from a real estate market perspective (along with page references).

2.2.2 Building Permits

- Industrial building permit values ranged between roughly $50-$120 million annually over the 2015-2019 period – with considerable variation year-to-year. In both 2015 and 2017, values were in the range of $120 million, while in 2016, 2018, and 2019, values were at the lower end of the range, at $47-$57 million.
- In reviewing commercial building permits during the 2015-2019 period, values ranged from a low of around $64 million in 2017 to a high of $145 million in 2019.
- Institutional building permits approached $150 million in value in 2018 – by far the most significant activity in this asset class over the 2015-2019 period. In other years, vales ranged between approximately $40-$90 million. (p. 7)

2.3 Discussions with Economic Development Staff from Select Local Municipalities

2.3.1 Introduction

Cushman & Wakefield held one-on-one discussions with Economic Development staff from various local municipalities including the following: Bradford West Gwillimbury, Collingwood, Innisfil, New Tecumseth, Penetanguishene, and Wasaga Beach. These communities represent the largest settlement areas across the County, and are home to a sizable share of existing employment lands – both occupied and overall designated supply (when airport lands are excluded – such as Lake Simcoe Regional Airport, Collingwood Regional Airport, and Edenvale Airport, which are all large sites). The following notes are highlights of the discussions.

2.3.2 Bradford West Gwillimbury (BWG)

- The municipality recently completed an update to its Official Plan.
- There is a good amount of available employment land, although not all of it is shovel-ready.
- Some area landowners may be waiting for land values to increase further before proceeding with development, or a land sale that triggers development by another party.
- Fractured land ownership is a barrier to development in some locations – notably, some portions of Highway 400 frontage employment lands. This makes servicing these lands more of a challenge, with multiple parties involved in negotiations.
- The Bradford West Gwillimbury Strategic Settlement Employment Area is planned to be developed from south to north. Future phases of development will be permitted to proceed once substantial completion of the prior phase is reached.
- The lands along Highway 88 between Sideroad 10 and Highway 400 are a logical location for additional growth, should it be needed during the forecast horizon. This would complete the link between the existing built-up area of Bradford and Highway 400.
- Site selection/land availability inquiries have doubled during the past year, and doubled over the prior year as well; there is very strong interest in this area. This includes both new businesses and proposed expansions of existing local businesses.

- The municipality offers Community Improvement Plan incentives to stimulate investment in BWG's Industrial Areas and Downtown Bradford. Council has approved the programs to run to the end of 2021. The Industrial Areas CIP includes the following: Development Charge Grant Program; Tax-based Redevelopment Grant Program; Planning Fees and Building Permit Grant Program; and Building, Restoration, Renovation, and Improvement Program.
- Key economic sectors include advanced manufacturing (automotive-related, steel, aluminum, plastics, and packaging); warehousing and fulfilment; construction; transportation and logistics; and agri-food processing (proximity to Holland Marsh is an asset).
- While there has been private sector interest in employment land conversions, staff have resisted these requests. With so munch apparent demand for employment lands in this area, there is a need to preserve the designated land uses.
- Presently there is a wastewater servicing constraint along Highway 400 which requires a resolution (there is a lack of landowner consensus). Reports indicate that water allocation is suitable to meet anticipated demand to 2031, but longer-term capacity needs to be examined.
- The planned Bradford Bypass would improve mobility/accessibility. The proposed highway would extend from Highway 400 between Lines 8 and 9 in Bradford West Gwillimbury, cross a small portion of King Township, and connect to Highway 404 between Queensville Sideroad and Holborn Road in East Gwillimbury. It is a proposed 16.2-kilometre long freeway connecting Highway 400 and Highway 404 in the Regional Municipality of York and County of Simcoe. The Environmental Assessment for the project is currently being updated, with approval expected by the end of December 2022. A route planning study, Environmental Assessment, and Recommended Plan for the project were all previously approved in 2002.

2.3.3 Collingwood

- Since the entire community is built to the Settlement Area boundary, there are limited geographic options for expansion of employment lands.
- Traditional employment land uses are declining, and some businesses have left the community.
- The lake means that there is no market/trade area to the north.
- The community is approximately 1 hour's drive to the nearest major highway (Highway 400), so the Town's location isn't suited to some employment uses that require a high degree of mobility/goods movement.
- While the creative economy is growing locally, there have not been a lot of inquiries regarding typical employment lands uses.
- Professional services and technology-related businesses seek office space (including co-working settings), as well as mixed-use spaces. They don't require industrial-type premises.
- Tourism-related businesses sometimes require large footprints, and could be suited to employment lands sites.
- The municipality is in the process of updating its Official Plan. The present Zoning By-Law has five industrial zones, and this needs to be amended to provide greater flexibility.
- Staff's priority is to generate employment opportunities, not simply to increase the assessment base (i.e. they are not seeking warehouses that are home to few employees).
- The "sweet spot" in terms of demand is 5,000-10,000 sf premises. Multi-tenanted small-bay product would be in highest demand. Do not need new large facilities for lease.
- Municipality does not face conversion pressure for employment lands to a non-employment use. Staff does not wish to pursue conversion to residential uses.

- Due to inadequate water capacity, an interim control by-law passed April 26, 2021 prohibits any new construction (residential and non-residential) for one year unless the project already has a building permit. The water treatment plant is currently undergoing an expansion scheduled for completion in 2025.
- Discussions regarding the construction of a potential new hospital to serve the community generate the possibility that it could be built on employment lands in the southeast part of the municipality, on an undeveloped large site.

2.3.4 Innisfil

- A challenge with employment land supply relates to a need for additional infrastructure/servicing – wastewater in particular.
- The municipality is an estimated five years away from having servicing available along Highway 400 at Innisfil Beach Road (a prime location for development).
- While there is no municipal ownership of employment land, there are five large private landowners in the local market.
- There was a landowners meeting on April 20, 2021 to review strategy and ideas on how best to move forward to make the lands productive for employment uses. All of the owners confirmed that there is significant interest in their landholdings here, by what was described as very substantial businesses. Several landowners have said they receive calls every week about this location. It was agreed that the only issue holding back the area’s potential is a lack of servicing
- A nine-block industrial business park is being developed on a 68-acre site. A building supply company will be the first occupant, and manufacturing uses are being targeted, as well as industrial mixed-use.
- Georgian Downs is focused on growth in entertainment/hospitality – possibly a hotel.
- The municipality is seeking manufacturing and smart technology occupiers – they want to attract jobs… not self storage facilities.
- There is a 25-acre tourism-related project in the development pipeline that could add 100-300 jobs within the next 24 months (no additional details were provided at this time).
- There is presently no pressure for employment land conversion.

2.3.5 New Tecumseth

- An employment land supply challenge is that two landowners control significant holdings in Alliston (the designated growth area). Pure land supply is not the challenge… development-readiness is the primary issue.
- Alliston is the preferred focus for growth. It has the most significant labour pool within the municipality, has infrastructure in place (although water supply is identified as a potential challenge), and is identified as a Provincially Significant Employment Zone.
  - Note: Provincially Significant Employment Zones (PSEZ) were introduced by the Province of Ontario/Ministry of Municipal Affairs and Housing in 2019. As areas of high economic output, PSEZ are strategically located to provide stable, reliable employment across the region. They enable opportunities to improve coordination between land use planning, economic development, and infrastructure investments to support investment and job creation over the longer-term. *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* sets out new policies that protect employment areas critical to the local and provincial economy. These policies give municipalities the flexibility to change the use of lands from employment areas to other uses, while making sure key employment areas are protected for the long-term.[1]

[1] https://www.ontario.ca/page/provincially-significant-employment-zones

- Compared to Alliston, Beeton and Tottenham are not as well situated from a site selection perspective.
- There is latent demand in the local market. Demand is greatest for sites in the 5-10 acre range, while developers are hoping to attract larger users.
- There has been some private sector interest in converting employment lands to non-employment uses.
- The Zoning By-Law is currently being updated.
- Automotive manufacturing and suppliers (many adjacent/nearby) are keys to the local economy. The municipality seeks increased manufacturing diversification.
- There are few site selection options (vacancies) available in the commercial sector.
- Water supply capacity has been pre-allocated to pending developments. This means that future capacity is an issue to be addressed over time.

2.3.6 Penetanguishene

- Some designated parcels of employment land have natural heritage features that may limit the extent of development that is feasible.
- As part of the recent Official Plan update, the municipality increased its supply of designated employment land.
- On some sites, zoning may need to be adjusted to permit the type of development that is sought. In some cases, the zoning is not in alignment with the Official Plan.
- The Official Plan designated employment lands are serviced or are capable of being serviced.
- Servicing the smaller available parcels is easier than some of the large vacant sites that may be suited for employment land development.
- There appears to be demand for offices and commercial space for contractors, as well as self storage facilities.
- Heavy industrial land demand is not anticipated; light industrial uses are the focus of growth opportunities. Heavy industrial would face potential restrictions due to well protection.
- There is a suitable supply of employment land, as well as opportunities for intensification. There is no conversion pressure.
- In order to capitalize on growth opportunities, the municipality needs shovel-ready lands and correct the zoning in place.
- Have to go through Midland to get anywhere, so accessibility is a drawback from a site selection perspective.
- There is a need for site planning related to building coverage due to stormwater issues. The municipality has water and sewer capacity remaining.

2.3.7 Wasaga Beach

- Wasaga Beach is a unique community. It was not built on an employment base… it does not have primary (resource-related) industry… it is not a transit hub… it has no true historic downtown commercial core, nor blocks of employment lands. It has a very linear pattern of growth along the lakeshore, and a services and hospitality-focused seasonal local economy.
- The Town has embraced *Growth Plan* principles related to growth management and intensification.
- Infrastructure and servicing are not a limitation – there is adequate remaining capacity. Can service a population up to 35,000 people.

- Growth has been fuelled by Baby Boomers; over one-half of the population is 50+ years old. It is among the top 10-15 fastest growing communities in Canada, on a per capita basis.
- Want to attract more growth in young families by providing community facilities and amenities (new twin-pad arena, library, potential new high school). Trying to align infrastructure/facilities with desired demographics.
- Construction sector has been a strength. Employment land-related jobs have been a weakness, historically.
- Aspire to be a more complete community beyond construction, recreation, and hospitality sectors. Professional services are expanding to meet growing needs. Full-time professional jobs are a target for growth. Need to protect employment lands for shovel-ready opportunities that emerge. Want to bring industrial jobs – “primary employment”. Do not want to be a bedroom community.
- An update of the Official Plan is in progress. The service commercial zones permit manufacturing and production – these are its “employment lands”.
- Economic development strategy is in progress. Four targeted sectors are: professional, scientific, and technical services; small-scale manufacturing; information and cultural; and health/wellness.
- There has been pressure to convert employment land to residential use, given the slow pace of absorption of employment lands (although there aren’t “pure” employment lands in the town).
- Appropriate location for future employment lands would be on the west side of town (including Beechwood Road), and/or the east gateway to the community (River Road West, heading to Elmvale). Allows for easy connection to infrastructure/servicing.

3.0 POTENTIAL LOCATIONS TO ACCOMMODATE EMPLOYMENT LAND NEEDS

3.1 Introduction

In order to provide an assessment of the potential locations of future lands to accommodate employment growth across Simcoe County, Cushman & Wakefield has relied upon the four geographic quadrants described in the *Economic Development Strategy*, guided by their locational characteristics:

- **South Simcoe** – Municipalities in South Simcoe include the Towns of Innisfil, Bradford West Gwillimbury, and New Tecumseth; and Townships of Adjala-Tosorontio and Essa.
- **West Simcoe** – Municipalities in West Simcoe include the Townships of Springwater and Clearview; and Towns of Collingwood and Wasaga Beach.
- **North Simcoe** – Municipalities in North Simcoe County include the Towns of Midland and Penetanguishene; and Townships of Tay and Tiny.
- **East Simcoe** – Municipalities of East Simcoe County include the Townships of Oro-Medonte, Ramara, and Severn.

For each quadrant/municipality, we discuss local issues of significance, and explore their strengths and weaknesses, from a site selection perspective. As well, we provide an opinion regarding the timing of the market opportunity for each location.

3.2 Decision-Making Factors

The following is a list of factors that can be considered in the decision-making process regarding site selection for employment lands:

- Does the site provide good **access to labour** – both within the local municipality, and across Simcoe County – today, and in the future?
- Is the site in **proximity to other established employment areas**, in order to promote supplier-customer dynamics, and provide an opportunity for expansion of existing businesses?
- Does the location **complement planned employment uses nearby**?
- Is the site part of/in **proximity to a strategic economic and employment area**, including provincially significant areas/zones?
- Does the site/location potentially serve the needs of occupiers/businesses that generate **economic activity in a rural area, benefitting from separation/distance from urban lands**?
- Does the site offer direct/proximate **access to Highway 400**?
- Does the site offer **visibility on arterial highways**?
- Does the site feature **accessibility to transportation infrastructure such as rail lines or an airport**?
- Is the area large enough to provide opportunities for **significant contiguous blocks of land** for employment uses?
- Does the area provide sufficient land to **accommodate land-extensive users**, such as manufacturing, warehousing, and logistics properties?
- Are there any **existing land uses that can be leveraged** for a spin-off economic effect?
- Are there any **physical features that could preclude/inhibit development**?
- Can employment uses be added in a way that **land use conflicts can be managed/avoided** – such as proximity to residential and any sensitive land uses?
- Is the location **conducive to attracting targeted employment sectors** in the County's *Economic Development Strategy*, including manufacturing; tourism; professional, scientific, and technical services; and agriculture (including value-added production and agri-tourism)?

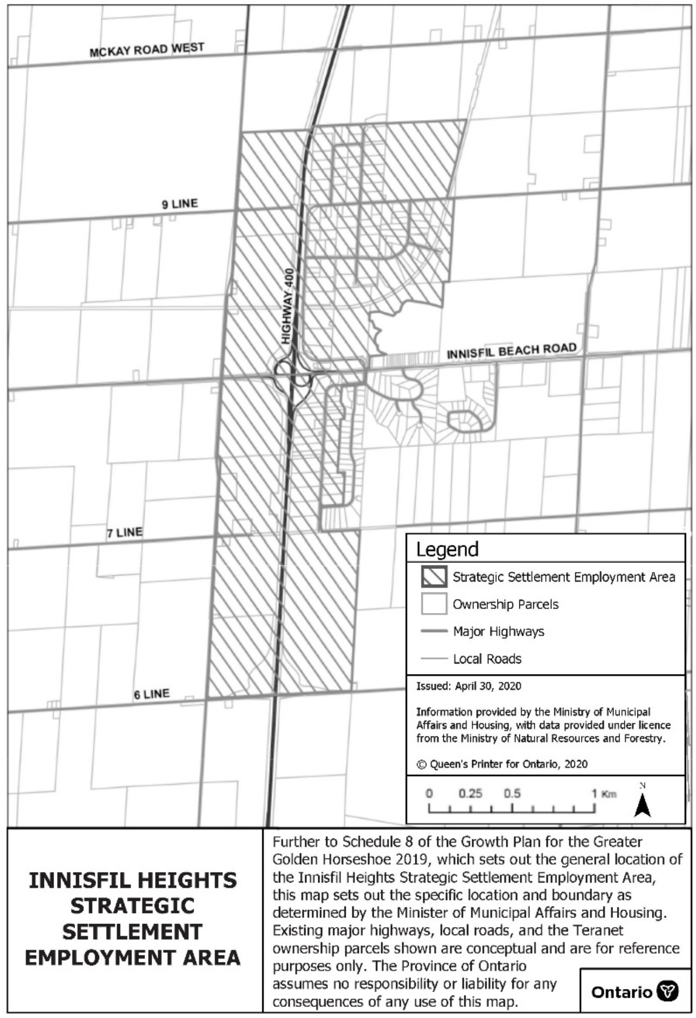
3.3 Location Analysis

3.3.1 South Simcoe

Municipalities in South Simcoe include the Towns of Innisfil, Bradford West Gwillimbury, and New Tecumseth; and Townships of Adjala-Tosorontio and Essa.

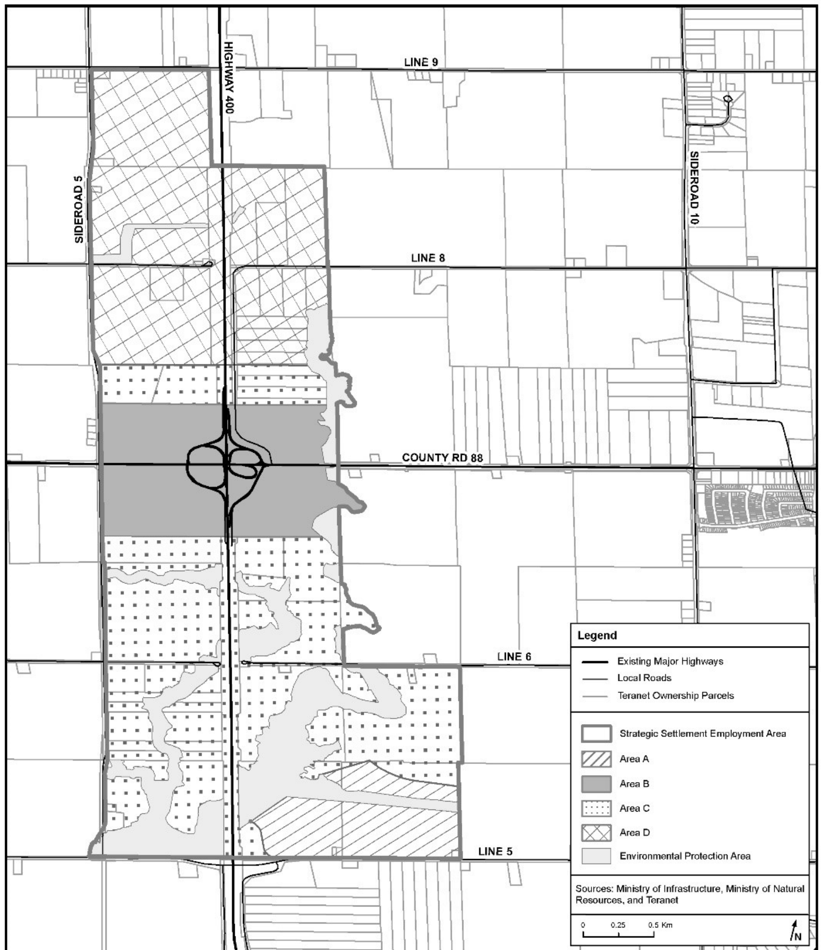
Strategic Economic and Employment Areas

- The *Growth Plan* identifies the **Innisfil Heights Strategic Settlement Employment Area** as a strategic economic and employment area.
  - The Employment Area is located on either side of Highway 400, from 6 Line in the south to north of 9 Line. Innisfil Beach Road offers a full interchange.
  - Permitted uses in the Innisfil Heights Strategic Settlement Employment Area will be limited to manufacturing, warehousing, assembly, processing, research facilities, and outdoor storage uses that depend on access to, and the efficient movement of goods on, Highway 400; and employment-supportive uses. Major retail and residential uses are not permitted.



- Employment-supportive uses will be limited to commercial and highway commercial uses, office, tourist, and recreational uses that are accessory to a permitted use, which are compatible with permitted uses, or serve the permitted uses.
- The Innisfil Heights Strategic Settlement Employment Area will be planned to ensure the availability of large lots that support the permitted uses that depend upon the efficient movement of goods and access to Highway 400.
- Employment-supportive uses will occupy no more than 25% of the total area of the Employment Area.
- Where employment-supportive uses are permitted, they will be planned to be compact in design and limited in scale to maintain the primary function and character of the Innisfil Heights Strategic Settlement Employment Area, and will be developed concurrently with the development of the permitted uses they support.
- From a real estate market and site selection perspective, the identification of this strategic employment area leverages land uses already in place along Highway 400 in Innisfil. Proximity to the City of Barrie to the north and York Region and the broader Greater Toronto Area to the south provides linkages to suppliers and customer markets. This location is well suited to occupiers that benefit from proximity to major markets, but do not need to be adjacent to them in their supply chain and distribution networks.

- The *Growth Plan* identifies the **Bradford West Gwillimbury Strategic Settlement Employment Area** as a strategic economic and employment area.
  - The Employment Area is situated along Highway 400 from Line 5 in the south to Line 9 in the north. It is subdivided into four Areas: A, B, C, and D, with varying land uses permitted.
  - In certain Areas, various lot size parameters are identified in the *Growth Plan*.
  - In certain Areas, the permitted maximum land area for employment-supportive and office uses is specified.
  - Area A – Permitted uses: Manufacturing, assembly, fabrication and processing of mechanical equipment, and warehousing. Ancillary uses: retail sales, cafeteria/restaurant, day care facility, equipment servicing areas, outdoor display of machinery, outdoor storage, test yard (sandbox/sandpit) for testing equipment, training facilities, administration office, and parking.



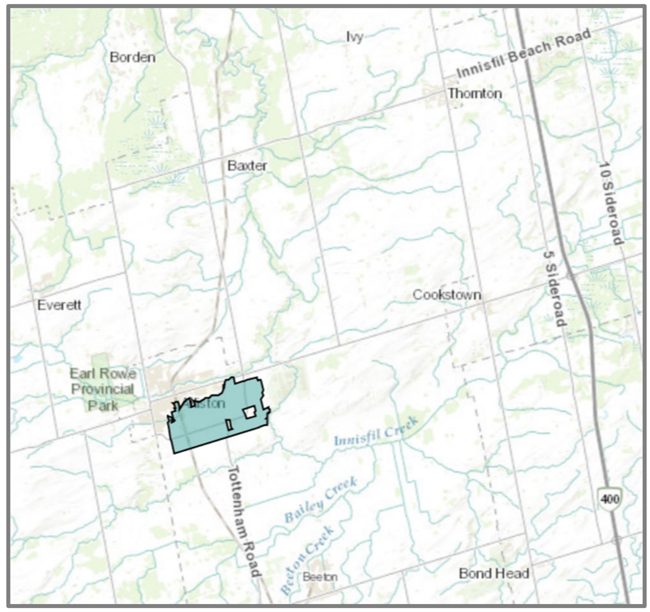
Bradford West Gwillimbury Strategic Settlement Employment Area

Further to Schedule 8 of the *Growth Plan for the Greater Golden Horseshoe, 2006*, which sets out the general location of the Bradford West Gwillimbury Strategic Settlement Employment Area, this map sets out the specific location and boundary as determined by the Minister of Infrastructure for use in implementing Amendment 1 (2012) to the *Growth Plan for the Greater Golden Horseshoe, 2006*. Existing major highways, local roads, and Teranet ownership parcels shown are conceptual and are for reference purposes only. The Province of Ontario assumes no responsibility or liability for any consequence of any use made of this map.

- Area B – Permitted employment uses: Distribution centre, food processing, manufacturing, research facility including laboratory, warehouse, and training facility. Data centre if total gross floor area is less than 10,000 m^2. Ancillary office. Ancillary retail sales with a maximum of 10% of the gross floor area of the total gross floor area of the building or structure. Permitted office uses: To a maximum gross floor area of 10,000 m^2. Permitted employment-supportive uses: Automobile service station, bank, convenience store, day care facility, fitness centre, food store to a maximum gross floor area of 600 m^2 (the maximum aggregate gross floor area of all food stores shall not exceed 1,200 m^2), hotel (including ancillary banquet and convention facilities) to a maximum gross floor area of 8,000 m^2, machinery and equipment sales and rental, personal service shop, restaurant, retail establishment (to a maximum gross floor area of 3,500 m^2 per retail establishment), service shop, and private training centre. Other permitted uses: Existing uses, parks and open space, and public uses.
- Area C – Permitted employment uses: Distribution centre, food processing, manufacturing, outdoor storage as an accessory use, research facility including laboratory, warehouse, and training facility. Data centre if total gross floor area is less than 7,500 m^2. Ancillary office. Ancillary retail sales with a maximum of 10% of the gross floor area of the total gross floor area of the building or structure. Permitted office uses to a maximum gross floor area of 7,500 m^2. Permitted employment-supportive uses: Automobile service station, bank, convenience store, day care facility, fitness centre, machinery and equipment sales and rental, personal service shop, restaurant, service shop, and private training centre. Other permitted uses: Parks and open space, and public uses.
- Area D – Permitted uses: Agricultural uses, agricultural-related uses and secondary uses, single dwelling, home occupation, seasonal farm product sales outlet, and existing uses.
- Environmental Protection Area – Permitted uses: Conservation and management of plants and wildlife; flood and erosion control; open space, and walking, hiking, bicycling, and cross-country skiing trails.
- Major retail and residential uses are not permitted within the Employment Area.

  - From a real estate market and site selection perspective, the identification of this strategic employment area supports the phased development of a cluster of uses focused on Highway 400, north of the built-up edge of the Greater Toronto Area. In the same way that Milton (Halton Region) and Caledon (Peel Region) saw their employment areas emerge over the past 10-15 years as a result of offering land availability and large sites on the urban periphery, the Bradford West Gwillimbury Strategic Settlement Employment Area features a similar site selection proposition in the near to medium term for occupiers not reliant upon a central location within the Greater Toronto Area. In some ways, the Bradford West Gwillimbury Strategic Settlement Employment Area competes with non-GTA industrial/employment market alternatives such as Hamilton, Brantford, Guelph, and Kitchener-Waterloo.

- The *Growth Plan* identifies the **Alliston Provincially Significant Employment Zone (PSEZ)** located within the Town of New Tecumseth as a strategic economic and employment area.



  - The Alliston PSEZ is located south of Highway 89, along Tottenham Road, southwest of the settlement of Alliston.
  - As areas of high economic output, provincially significant employment zones are strategically located to provide stable, reliable employment across the region. They provide opportunities to improve coordination between land use planning, economic development, and infrastructure investments to support investment and job creation over the longer term. The *Growth Plan* sets out new policies that protect employment areas critical to the local and provincial economy.
  - The Province has identified provincially significant employment zones as the first phase towards planning for the long term. *Growth Plan* policies only apply to areas within a zone that have been designated as employment areas in a municipality's official plan.

Site Selection Perspectives

Among the four geographic quadrants in Simcoe County, South Simcoe is best positioned to leverage its proximity to the large population, labour force, and established employment areas to the south in Peel, York, and Durham Regions for future economic growth opportunities. As noted in the County's *Economic Development Strategy*, this region is experiencing the most rapid population growth and interest from an investment perspective. Given their adjacency to both Highway 400 and Highway 27, the municipalities of Bradford West Gwillimbury and Innisfil in particular offer superior access to labour from within the local municipality, across Simcoe County, and across the broader Greater Toronto Area. These highways also provide key links to other established employment areas, which can promote supplier-customer connections that can be capitalized upon for future growth opportunities on employment lands, as well as foster expansion of existing local industries.

The *Growth Plan* identifies the Innisfil Heights Strategic Settlement Employment Area and the Bradford West Gwillimbury Strategic Settlement Employment Area as strategic sites for economic growth, and a Provincially Significant Employment Zone is identified in New Tecumseth (Alliston). These locations are planned for considerable economic growth over the coming decades, leveraging their site selection advantages which include access/adjacency to Highway 400, proximity to established industry, and good access to skilled labour. Accordingly, demand for employment lands is identified in the immediate/near term, as well as throughout the forecast horizon to 2051 as these employment areas mature.

All locations identified in the *Growth Plan* offer significant contiguous blocks of land for employment uses, and provide sufficient land to accommodate land-extensive users, such as manufacturing, warehousing, and logistics properties. Proximity to the City of Barrie presents opportunities for South Simcoe's municipalities from an economic development perspective, as it provides a pool of labour and established businesses that can be leveraged.

Given its proximity to the City of Barrie, the Township of Essa may attract users seeking access to the urban market at a lower cost of land for employment purposes. While Bradford West Gwillimbury and Innisfil are more likely to attract larger users that require highway adjacency, Essa's employment lands may be suited to smaller enterprises seeking sites in the range of 1-5 hectares, and support growth related to the agricultural sector in particular. There is likely no requirement to identify additional employment lands in this municipality.

The Township of Adjala-Tosorontio has among the smallest occupied employment land inventories across all of Simcoe County's local municipalities, and is unlikely to contribute to significant growth over the coming decades, given its peripheral location, and distance from major highways and labour markets. It is likely that future employment land demand that emerges will be small-scale enterprises with connections to other businesses across the County (community-based, as opposed to export-based industry), as well as agricultural-related opportunities. Accordingly, there is likely no requirement to identify additional employment lands in this municipality.

3.3.2 West Simcoe

Municipalities in West Simcoe include the Townships of Springwater and Clearview; and Towns of Collingwood and Wasaga Beach.

Strategic Economic and Employment Areas

The *Growth Plan* does not identify and strategic economic and employment areas in West Simcoe.

Site Selection Perspectives

Given the geographic location of West Simcoe – bordering Georgian Bay to the north and the largely rural Grey and Dufferin Counties to the west/southwest – there is not a significant scale of occupied traditional employment lands (when airport lands are excluded). The communities of Collingwood and Wasaga Beach are focused primarily on population-related employment, and function as commercial services centres catering to local residents, seasonal residences, and tourists alike.

Wasaga Beach does not currently offer a significant amount of employment lands – although it aspires to provide a more balanced jobs market over time beyond its current strengths in the construction, recreation, and hospitality sectors. Within Collingwood, traditional employment land uses are declining, and some businesses have left the community. Excluding the two airports (Collingwood Regional Airport and Edenvale Airport – which are large sites), Clearview Township is home to only a limited extent of occupied employment lands, and it is unlikely that growth will necessitate the addition of new lands to accommodate future occupier demand. This is also the case in Springwater Township, where occupied lands are small-scale and dispersed in nature.

Future demand for employment lands in West Simcoe is likely to be smaller-scale in nature, given the distance to major markets/other established employment centres, and longer travel time to a major highway which inhibits efficient goods movement compared to other Simcoe County alternatives. While additional employment lands may be required in both Wasaga Beach and Collingwood in order to accommodate potential future growth, the location of these lands must be carefully considered to ensure land use compatibility with other uses. From a timing perspective, these issues should be resolved in the near term in order to capitalize on opportunities which could arise. It is unlikely that sufficient demand will emerge to warrant the designation of additional employment lands in either Clearview or Springwater Township during the forecast horizon, although opportunities for agricultural sector-related growth must be considered.

3.3.3. North Simcoe

Municipalities in North Simcoe County include the Towns of Midland and Penetanguishene; and Townships of Tay and Tiny.

Strategic Economic and Employment Areas

The *Growth Plan* does not identify and strategic economic and employment areas in North Simcoe.

Site Selection Perspectives

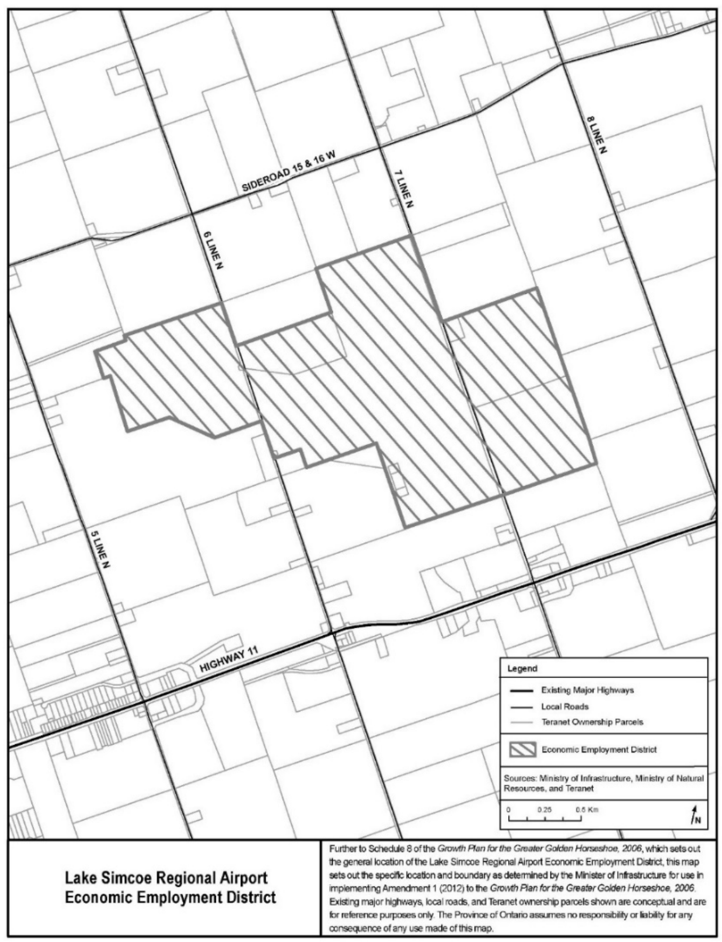
From a site selection point of view, the municipalities in North Simcoe are distant from major population centres and concentrations of economic activity that could be leveraged for spin-off employment opportunities (other than Barrie). The relatively inferior proximity to established employment areas and labour markets versus other Simcoe County municipalities inhibits the prospects for employment land demand growth over time, and there is likely no need to designate additional employment lands.

As part of its recent Official Plan update, Penetanguishene increased its supply of designated employment land, although the presence of natural heritage features may impact the development potential of a portion of its vacant lands (this topic requires further analysis by staff). Midland has a number of remaining sites along Highway 12 to accommodate a range of users and site sizes. The Townships of Tiny and Tay have a modest base of employment lands, and any growth that emerges is likely to be small-scale in nature.

3.3.4 East Simcoe

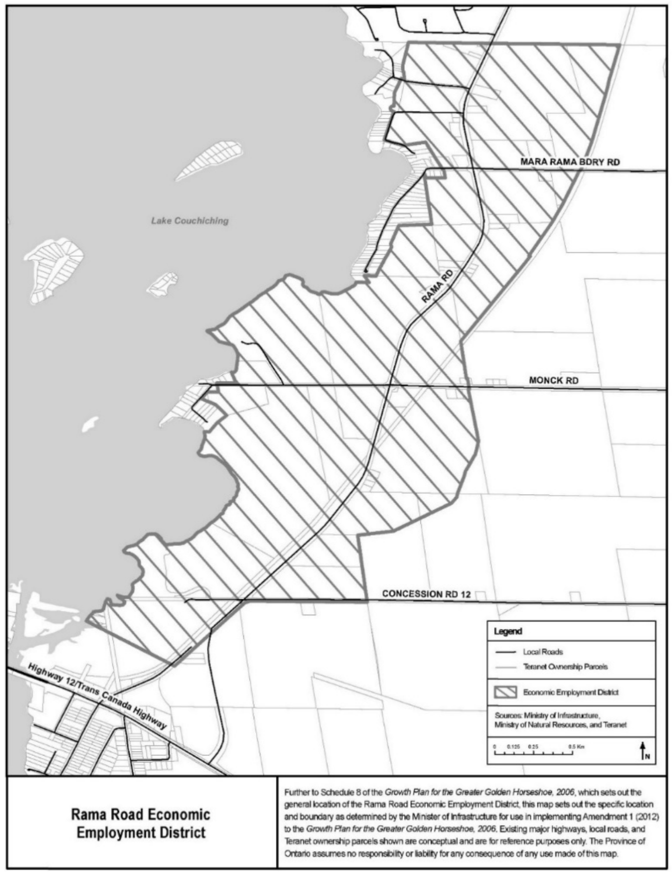
Municipalities of East Simcoe County include the Townships of Oro-Medonte, Ramara, and Severn.

Strategic Economic and Employment Areas



- The *Growth Plan* identifies the **Lake Simcoe Regional Airport Economic Employment District** located in the Township of Oro-Medonte as a strategic economic and employment area.
  - The District generally lies north of Highway 11 and south of Sideroad 15 & 16 West, between 5 Line North and 8 Line North.
  - Uses are limited to airport facilities and accessory uses, airport-related manufacturing, assembly, maintenance, processing, fabrication, storage and warehousing, airport-related training facilities, research establishments, wholesaling establishments, and office uses. Major retail and residential uses are not permitted uses. The Lake Simcoe Regional Airport is subject to federal government regulation, and the airport use may not be subject to these restrictions.

- From a real estate and site selection perspective, municipal/regional airports offer a competitive advantage for select occupiers that can leverage the infrastructure. The challenge is that there are numerous airports at varying scales across Southern Ontario that compete for the same segments of employment (aircraft maintenance, flight training, airfield operations/systems, transportation security, perhaps regional shipping/distribution, etc.). Lake Simcoe Regional Airport Economic Employment District's location – roughly midway between the Cities of Barrie and Orillia – may present some opportunity over time, but there no critical mass of nearby employment uses to begin to take advantage of.
- The *Growth Plan* identifies the **Rama Road Economic Employment District** located in the Township of Ramara as a strategic economic and employment area.
  - Situated on the east side of Lake Couchiching, the District generally lies on either side of Rama Road, from Concession Road 12 in the south to just north of Mara Rama Boundary Road to the north.
  - Casino Rama Resort is located immediately north of the District, on the east side of Rama Road.
  - Uses are limited to tourism-related and recreational uses that accommodate large area commercial activities that are destinations or serve the needs of visitors. Such uses are limited to: entertainment; hotels, resorts, and other non-permanently occupied units; and accessory uses. Major retail uses are not permitted.



- Casino Rama is clearly the anchor attraction for spin-off opportunities that may emerge within the Rama Road Economic Employment District. From a real estate market and site selection perspective, proximity to cultural, recreational, and retail-services offerings in the nearby City of Orillia – and amenities/services along the shores of Lake Couchiching and Lake Simcoe – can be taken advantage of in the development of this subject area over time.

Site Selection Perspectives

The three municipalities in East Simcoe lie along the shores of Lakes Simcoe and Couchiching, and envelop the City of Orillia. Highways 400, 11, 12, and 169 are key arteries providing mobility across the municipalities and linking to adjacent communities.

Lake Simcoe Regional Airport is situated in the Township of Oro-Medonte, and is the hub of the Lake Simcoe Regional Airport Economic Employment District identified by the *Growth Plan*. Future employment land development that occurs at the airport will primarily generate economic opportunities within the Township itself. The *Growth Plan* identifies the Rama Road Economic Employment District located in the Township Ramara as an area of significance. Casino Rama Resort is located immediately north of the District, which is planned to support tourism-related and recreational uses that accommodate large area commercial activities that are destinations or serve the needs of visitors. It is not a traditional employment area in this sense, since industrial and office uses are not contemplated.

Nearby Orillia is a hub of retail and commercial activity. Proximity to this market presents opportunities for the three East Simcoe municipalities from an economic development perspective, as it provides a pool of labour and established businesses (supplier-customer networks are in place, and can be leveraged). As well, Highways 11 and 400 provide direct access to Barrie, situated a short drive to the south (roughly 30 minutes south of Orillia).

Oro-Medonte features several small clusters of employment land activity located along Highway 11 (including the airport), which offer varying amounts of remaining undeveloped land. These uses tend to be small-scale enterprises. Two Minister's Zoning Orders (MZO) pertaining to a proposed automotive innovation park (approximately 85 hectares across the street from the Lake Simcoe Regional Airport) and a proposed medical innovation park (33 hectares at 561 Line 7 N) signal new employment opportunities emerging in Oro-Medonte[2]. Ramara's existing employment lands are concentrated south of the community of Brechin on Highway 12. Severn's employment lands are dispersed, although there are clusters in the community of Coldwater, and on the north side of Highway 11, abutting the municipal boundary with Orillia. Given the extent of remaining undeveloped employment land, it is unlikely that additional lands will be required to accommodate growth over the forecast horizon.

4.0 COVID-19 IMPACTS AND CURRENT MARKET PERSPECTIVES

4.1 GTA Industrial Market Snapshot

Pre-pandemic, Cushman & Wakefield reported an overall GTA industrial vacancy rate of 1.3% (year-end 2019), which was the lowest rate ever recorded in this market. Despite supply chain disruptions and labour availability uncertainty in the early months of the pandemic in particular, industrial real estate has been among the best performing commercial real estate asset classes over the past 18 months, driven by a surge in demand for warehousing and distribution facilities linked to e-commerce, and "essential worker" mandates that kept many manufacturing businesses in operation. At mid-year 2021, the GTA's industrial vacancy rate declined to just 1.1% – a new record low.

In recent years, sustained occupier demand has continually exceeded the rate of new supply brought to market, leading to strong levels of absorption and underpinning rising rental rates. The average asking net rental rate has doubled from $5.50 psf in 2015 to a current level of $11.00 psf – the highest rate ever recorded in this market by Cushman & Wakefield.

These record low levels of vacancy and record high rents present opportunities for municipalities beyond the central Greater Toronto Area to capitalize on occupier space requirements in the near to medium term, and perhaps beyond. South Simcoe in particular competes with non-GTA industrial/employment market alternatives such as Hamilton, Brantford, Guelph, and Kitchener-Waterloo to foster industrial/employment growth.

Economic development efforts should focus on identifying and attracting businesses/industry segments that have the site selection preferences that are aligned with Simcoe's local municipalities to leverage the existing employment and land base, as has been articulated in the County of Simcoe's *Economic Development Strategy 2021-2025*.

[2] Note: The MZO for the proposed medical innovation park could be revoked, as the property has been listed for sale. On February 17, the minister initiated the revocation process through a newspaper notice "which allows the public, including the property owner, to make submissions regarding the proposed revocation. The submission period will end on March 28, 2022, at which point the minister will make a decision." (source: https://www.thestar.com/local-orillia/news/2022/03/14/oro-medonte-property-pulled-off-the-market-status-of-mzo-uncertain.html?li_source=LI&li_medium=star_web_ymbii

APPENDIX 1 – QUESTIONS FOR DISCUSSION WITH LOCAL MUNICIPALITIES

Note: Simcoe County staff provided Cushman & Wakefield with planning/economic development staff contacts at select local municipalities to solicit input to our analysis of real estate market and site selection issues as part of the Municipal Comprehensive Review. The attached set of questions was sent to local municipal staff in advance of our discussions.

Simcoe County Municipal Comprehensive Review

Discussions with Local Municipalities regarding Employment Strategy and Land Needs/Growth Management

Date: April 29, 2021

The following questions have been prepared to guide discussions with local municipalities:

- Does the municipality have a suitable supply of vacant (undeveloped) employment land?
- What location(s) would be best suited for future employment land allocation, if required?
- Which sectors of the economy have been expanding in the municipality, and which are targeted for growth?
- Can you provide any information to assist the Consulting Team and County in understanding what the local priorities for growth are, in terms of location, type, and amount of land/jobs?
- Do you have any information you can share about project timing and the number of jobs associated with large, known non-residential developments that are going to proceed in the next few years (or significant proposals)?
- Is there a local municipal interest to convert employment lands, and if so, why and for what purpose would it be converted?
- Are there any significant private sector requests for employment land conversion? Can you provide details on location, land size, proposed land use, etc.?
- Are there any infrastructure/servicing restrictions that could impact employment land development?

If you have any subsequent follow-up comments after our meeting, please contact me. Thanks for your assistance with this project.

Andrew Browning
Vice President, Valuation & Advisory
Cushman & Wakefield
andrew.browning@ca.cushwake.com
(416) 359-2510

Appendix C

Employment Density Analysis

CUSHMAN & WAKEFIELD

EMPLOYMENT STRATEGY

EMPLOYMENT DENSITY ANALYSIS

COUNTY OF SIMCOE

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March 23, 2022

Stefan Krzeczunowicz
Associate Partner
Hemson Consulting
30 St. Patrick Street, Suite 1000
Toronto, Ontario
M5T 3A3
Email: stefank@hemson.com

Regarding: County of Simcoe Employment Strategy – Employment Density Analysis

Dear Stefan,

Cushman & Wakefield was engaged as a sub-consultant as part of the broader Project Team, led by Hemson Consulting, to execute Simcoe County's Employment Strategy. The purpose of this report is to provide an examination of the nature of select established employment areas across Simcoe County, and to undertake an analysis of employment density in these areas as input to later work by the Project Team to determine forecast land requirements. The attached report serves as input to the Employment Strategy deliverables, and also supports the Land Needs Assessment.

Cushman & Wakefield appreciates the support of all the businesses that participated in the survey, and these individual responses have been kept confidential. We look forward to discussing this work with you at your convenience.

Respectfully submitted,

Cushman & Wakefield

Andrew Browning
Vice President, Valuation & Advisory
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TABLE OF CONTENTS

1.0 INTRODUCTION

1.1 Purpose of the Report and Intended Users

This consulting report has been provided to Hemson Consulting for the purposes of supporting development of an Employment Strategy as part of a Municipal Comprehensive Review for the County of Simcoe. This report includes an examination of the nature of select established employment areas across Simcoe County, and provides an analysis of employment density in these areas as input to later work to determine forecast land requirements.

The Intended Users of this report are staff of Hemson Consulting, Simcoe County, and other consultants engaged as part of the Municipal Comprehensive Review project. The material enclosed in this report is intended to be used in whole or in part to assist in the preparation of project deliverables.

1.2 Approach and Methodology

Employment density is an important metric in preparing a forecast of employment land need. Once an employment forecast has been prepared, the total employment is divided by an employment density, typically separated into various types of employment (Major Office, Employment Land Employment, Population-Related Employment, etc.). This employment density can be expressed in different ways:

1. *Building area per employee*, such as # of square metres per worker (e.g. 75 m^2 per employee).
2. *Employees per area of land*, such as # of workers per hectare (e.g. 15 employees per hectare). Already built into this figure is an assumption about the site coverage of buildings (the building area divided by the land area).

In order to identify the current employment density in Simcoe County, it is necessary to know the number of workers at local businesses, and the physical characteristics of these buildings (building area and land area). On July 14th and 16th 2021, Cushman & Wakefield conducted a door-to-door survey of select employment areas across Simcoe County to gather some sample data. The survey question focused on identifying the number of on-site jobs; those working off-site – such as truck drivers, mobile sales staff, etc. – are considered “no fixed place of work” jobs, and are adjusted for separately in land needs forecasting.

Cushman & Wakefield identified a series of employment areas for analysis across Simcoe County, with the objective of obtaining a range of data for analysis. Clusters of business in industrial areas/business parks were selected in order to facilitate door-to-door surveying in the following six municipalities: Oro-Medonte, Midland, Penetanguishene, and Collingwood (together reflecting “North Simcoe”), along with Innisfil and Bradford West Gwillimbury (representing the Highway 400-oriented businesses in “South Simcoe”).

A total of 35 businesses provided survey responses in North Simcoe, while 16 businesses were captured in South Simcoe, for a total of 51 surveys. Public health precautions related to the COVID-19 pandemic constrained the extent of our survey outreach, as a number of workplaces had strict entry controls limiting access to employees only. This was particularly the case for larger employers. Also, some industrial businesses have gated yards and do not anticipate visits from non-employees, other than scheduled deliveries and couriers, which limits our surveying capacity. Despite these limitations, useful insights were obtained in our work. The following section provides a summary of our on-the-ground observations and data analysis.

2.0 EMPLOYMENT DENSITY ANALYSIS

2.1 Oro-Medonte

The employment area surveyed in Oro-Medonte lies along the east side of Highway 11, just south of the Memorial Avenue exit to Orillia. It is known as Forest Home Industrial Park, and was selected because it offers a sizable cluster of businesses to facilitate our surveying. Many properties in this area featured considerable outside storage space for vehicles and equipment, and several were related to the trucking/freight industry. Some properties backed onto greenspace, so the functional/usable portion of the site may have been limited.

2.2 Midland

The cluster of businesses surveyed in the Town of Midland were located south of Highway 12 in the vicinity of William Street and King Street. Apart from conventional industrial and commercial properties, there is a wide mix of land uses in this industrial/business park, including a towing yard, school bus maintenance/storage, self storage, an aggregate pit, and more. Most of the industrial uses in this area were small-scale operations on small sites; the average land area of businesses surveyed was 0.5 hectares in size.

2.3 Penetanguishene

The employment lands in Penetanguishene are situated on the east side of the community, north of Robert Street East, and west of Fuller Avenue. The area is largely built-up with a mix of small-scale industrial and commercial uses, and a few larger facilities. Due to the nature of the businesses in this area (featuring less outside storage and yard space), the typical site coverage of those properties surveyed was higher (roughly 30%) than was observed elsewhere in the County in places we visited (which averaged 11%). Like neighbouring Midland, the average land area of businesses surveyed was at the lower end of our observations across Simcoe County, at just 0.4 hectares in size.

2.4 Collingwood

The Town of Collingwood's largest concentration of employment lands are located north of Poplar Sideroad and west of Highway 26. This area has a mix of small-scale industrial and commercial properties, storage uses, as well as several large industrial facilities. Outside storage of vehicles and equipment is a feature of some properties (particularly along Raglan Street). There is a significant amount of undeveloped land along Poplar Sideroad identified for employment use. It is our observation that Collingwood featured more multi-tenanted properties compared to other Simcoe County municipalities that we visited.

2.5 Innisfil

Innisfil's employment lands along the east side of Highway 400, north and south of Innisfil Beach Road, were the focus of our business surveys. The area features a range of commercial uses with Highway 400 frontage including marine/powersports sales, custom home builders, automotive dealers, and self storage. Industrial uses are more prevalent north of Innisfil Beach Road, and there is a significant amount of outdoor storage of vehicles, equipment, and raw materials/finished goods. As a consequence, the site coverage of many industrial properties is quite low (with many less than 10%).

2.6 Bradford West Gwillimbury

The Town of Bradford West Gwillimbury has two clusters of occupied employment lands – one along Artesian Industrial Parkway (with a mix of smaller-scale industrial and commercial uses, along with aggregate, concrete, and asphalt operations at the north end), and the other east of 10th Sideroad, north of Holland Street West (dominated by large industrial facilities).

2.7 Data Analysis

The employer survey and property data have been aggregated in order to compare our observations across select established employment areas in North Simcoe (Oro-Medonte, Midland, Penetanguishene, and Collingwood) to South Simcoe (Innisfil and Bradford West Gwillimbury – the two Highway 400-oriented employment clusters). The following are some notable observations:

- Among the 35 businesses surveyed across North Simcoe, the average number of employees was 12. This ranged from a low of one (a sole proprietor) to a high of 55, with over two-thirds of the businesses surveyed falling within a range of 5-20 employees. The 16 businesses surveyed in South Simcoe ranged in size from 6-100 employees, with an average of 22. Three-quarters of South Simcoe businesses surveyed had between 10-35 workers.
- The property sizes surveyed were on average larger in South Simcoe (1.4 ha) compared to North Simcoe (0.8 ha). Three-quarters of properties in North Simcoe were less than one hectare in size (27 out of 35) compared to 50% in South Simcoe (eight out of 16).
  - *Note: While smaller properties are the predominant building form in many of Simcoe County's employment areas, the limits to accessing many of the larger industrial facilities in our surveying due to pandemic-related precautions on the part of employers must be acknowledged in drawing any conclusions about this data.*
- On average, the amount of floor space per worker was higher in North Simcoe (75 m^2 per worker) compared to South Simcoe (61 m^2 per worker). The resulting average County-wide among businesses surveyed was 69 m^2 per worker.
- The average employment density figure in terms of employees per hectare was 15.5 across both North and South Simcoe.
- The average site coverage (building area divided by land area) was similar across both North and South Simcoe, in a tight range of 10%-12%. Many businesses surveyed exhibited significant yard space for vehicle parking, as well as storage of equipment and raw materials/finished goods.
  - *Note: It is Cushman & Wakefield's opinion that the inclusion of some of the larger manufacturing uses that were not surveyed would have the effect of increasing the average site coverage figure.*

SUMMARY OF DATA ANALYSIS FROM EMPLOYER SURVEY

Location	Average # of Employees	Average Land Area (ha)	Average Employment Density (m^2 per Employee)	Average Employment Density (Employees per Hectare)	Average Site Coverage (%)
North Simcoe	12	0.8	75	15.5	12%
South Simcoe	22	1.4	61	15.5	10%
TOTAL	**15**	**1.0**	**69**	**15.5**	**11%**

3.0 CONCLUSIONS

3.1 Summary of Analysis and Looking Forward

The preceding employer survey and property data reflects a cross-section of businesses that occupy employment areas across Simcoe County. An obvious limitation of this work is the absence of many of the larger employers in the municipalities that were visited. COVID-19-related access to the premises prevented our door-to-door surveying from capturing this data. Accordingly, the results of the data more closely reflect the typical smaller-scale occupiers of Simcoe County's industrial areas/business parks, which are home to a spectrum of industrial and commercial enterprises employing 5-50 workers (characterized as small businesses). Many firms take advantage of the availability of sites that offer yards space needed for vehicle parking, storage of equipment, and stockpiling of raw materials/finished goods. Trucking/freight-related businesses are a common sight across Simcoe County's employment areas, including dispatch, vehicle parking, sales, and maintenance/repair.

The employment clusters that were visited in our surveying efforts featured differing character – such as the commercial nature of businesses fronting Highway 400 in Innisfil, or the smaller sites with higher site coverage noted in Penetanguishene, or the concentration of large industrial buildings in the west part of Bradford West Gwillimbury. However, it is notable that the employment density on a land area basis remained the same, on average, in both North and South Simcoe (15.5 employees per hectare), as did the average site coverage (just over 10%). These are important metrics for consideration going forward as the Land Needs Assessment work progresses.

Looking forward, it is Cushman & Wakefield's view that rising infrastructure servicing costs and land acquisition costs are likely to place upward pressure on the employment density in new buildings in Simcoe County as developers/landlords and owner-occupiers build more densely than is observed on the ground today, out of necessity to make the new development economically feasible. Accordingly, established large sites that offer a lower site coverage – hence, more yard space – will become increasingly valued among prospective occupiers. It was an off-hand sentiment mentioned by several local businesses that they struggled to find suitable premises to expand their business within the local community due to a lack of inventory of available properties and the increasing cost of development.

APPENDIX 1 – INDUSTRIAL EMPLOYER SURVEY LETTER

Note: The attached letter was left behind at a small number of businesses that were unable or unwilling to respond to the survey question verbally at the time of our visit. Some responses were obtained via a follow-up email and included in our analysis.

Simcoe County Industrial Employer Survey 2021

Cushman & Wakefield is part of a consulting team that has been engaged by Simcoe County to prepare an **Employment Land Strategy and Land Needs Assessment** as part of a broader Municipal Comprehensive Review process. The objective of this work is to prepare a land demand projection that examines the impacts of a range of factors on land supply and demand, underpinned by a population and employment forecast.

A key input to this project is understanding the current **employment density** in the county's industrial areas. Employment density means the **number of employees per hectare**. We will use industrial employee information that you provide and link it with our property database (building size and land size) to calculate an average industrial employment density for use in our analysis.

You can assist us by telling us how many employees currently work at this location. It's that simple!

Thanks for your help with this project!

Business Name: ____

(example: Baker Manufacturing Inc.)

# of Employees at this location: ______________

(example: 22)

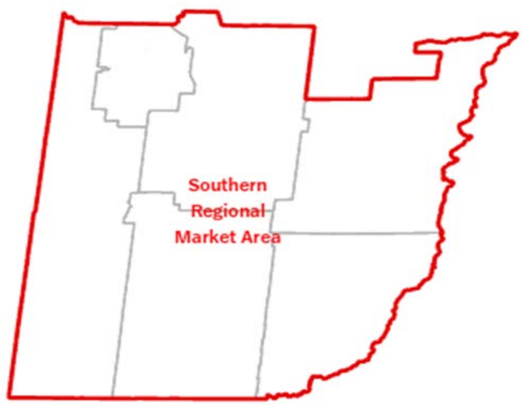
Address (Street Number and Name): ____

(example: 95 Oak Street)

If you have any questions about this Industrial Employer Survey, please contact Andrew Browning, Vice President, Cushman & Wakefield, at 416-359-2510 or andrew.browning@cushwake.com or Greg Marek, Manager of Planning, County of Simcoe, 705-726-9300 ext. 1362 or greg.marek@simcoe.ca

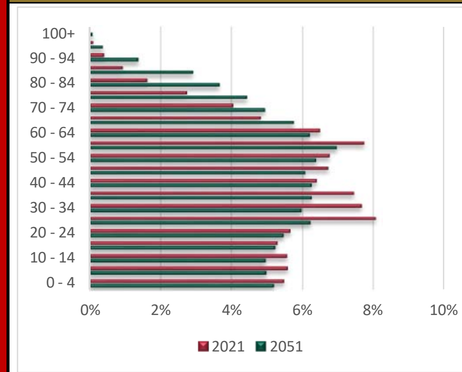
Appendix D

Detailed Forecast Results



RMA SOUTH

Population Age Structure
2021 and 2051



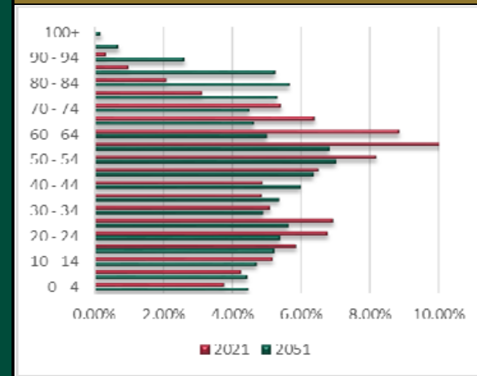
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	123,530				37,300	1,950	3,850	43,100	
2016	142,940	19,410	3.0%	64.5%	42,050	2,590	4,280	48,920	5,820
2021	169,750	26,810	3.5%	58.2%	47,360	4,060	5,360	56,780	7,860
2026	191,340	21,590	2.4%	61.7%	54,480	5,750	6,800	67,030	10,250
2031	212,470	21,130	2.1%	61.1%	60,780	7,350	8,190	76,320	9,290
2036	234,580	22,110	2.0%	65.0%	67,740	8,960	9,560	86,260	9,940
2041	255,870	21,290	1.8%	68.5%	74,900	10,530	10,970	96,400	10,140
2046	275,820	19,950	1.5%	66.2%	80,960	12,060	12,160	105,180	8,780
2051	295,220	19,400	1.4%	65.7%	86,800	13,550	13,340	113,690	8,510
2021-51 Growth		**125,470**	**1.9%**	**64.6%**	**39,440**	**9,490**	**7,980**	**56,910**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	50,270				0	24,830	13,390	12,050	50,270
2021	54,300	4,030	1.6%	62.6%	0	28,960	13,230	12,110	54,300
2026	62,060	7,760	2.7%	60.8%	0	34,450	15,350	12,260	62,060
2031	69,210	7,150	2.2%	61.6%	0	39,680	17,090	12,450	69,220
2036	77,540	8,330	2.3%	62.7%	620	44,110	20,180	12,630	77,540
2041	85,980	8,440	2.1%	64.2%	1,480	48,260	23,460	12,790	85,990
2046	96,450	10,470	2.3%	64.0%	2,200	52,850	28,540	12,850	96,440
2051	105,780	9,330	1.9%	65.5%	3,100	57,430	32,340	12,930	105,800
2021-51 Growth		**51,480**	**2.2%**	**63.3%**	**3,100**	**28,470**	**19,110**	**820**	**51,500**

Adjala-Tosorontio

Population Age Structure 2021 and 2051



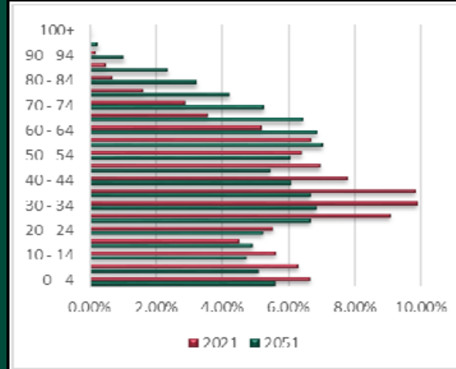
FORECAST RESULTS

Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Housing By Type Rows	Housing By Type Apartments	Housing By Type Total	Housing By Type Growth
2011	10,880				3,550	10	20	3,580	
2016	11,270	390	0.7%	1.3%	3,740	10	100	3,850	270
2021	11,260	(10)	0.0%	0.0%	3,740	10	100	3,850	0
2026	11,380	120	0.2%	0.3%	3,830	10	90	3,930	80
2031	11,480	100	0.2%	0.3%	3,860	10	90	3,960	30
2036	11,580	100	0.2%	0.3%	3,890	20	90	4,000	40
2041	11,700	120	0.2%	0.4%	3,910	20	90	4,020	20
2046	11,820	120	0.2%	0.4%	4,000	20	90	4,110	90
2051	11,970	150	0.3%	0.5%	4,080	30	90	4,200	90
2021-51 Growth		**710**	**0.2%**	**0.4%**	**340**	**20**	**(10)**	**350**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Employment By Type Pop-Related	Employment By Type Emp. Land	Employment By Type Rural	Employment By Type Total
2016	2,150				0	160	60	1,920	2,140
2021	2,130	(20)	-0.2%	-0.3%	0	140	60	1,930	2,130
2026	2,210	80	0.7%	0.6%	0	180	80	1,950	2,210
2031	2,270	60	0.5%	0.5%	0	190	90	1,990	2,270
2036	2,330	60	0.5%	0.5%	0	210	110	2,020	2,340
2041	2,390	60	0.5%	0.5%	0	220	130	2,040	2,390
2046	2,440	50	0.4%	0.3%	0	230	150	2,050	2,430
2051	2,490	50	0.4%	0.4%	0	250	170	2,070	2,490
2021-51 Growth		**360**	**0.5%**	**0.4%**	**-**	**110**	**110**	**140**	**360**

Bradford West Gwillimbury

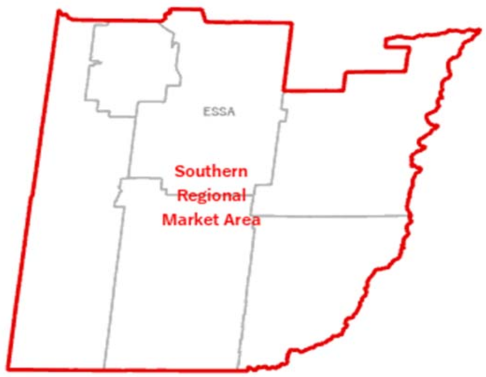
Population Age Structure
2021 and 2051



FORECAST RESULTS

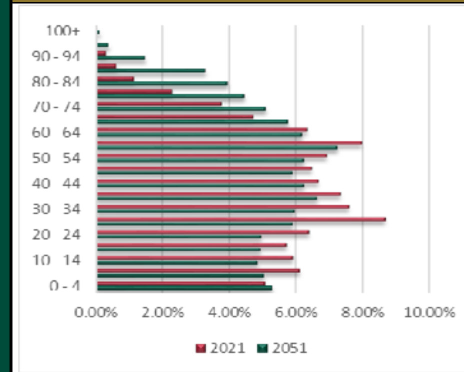
Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	28,870				7,700	310	1,460	9,470	
2016	36,560	7,690	4.8%	25.6%	9,420	570	1,600	11,590	2,120
2021	44,490	7,930	4.0%	17.2%	10,690	920	1,810	13,420	1,830
2026	51,140	6,650	2.8%	19.0%	12,870	1,320	2,350	16,540	3,120
2031	58,340	7,200	2.7%	20.8%	14,810	1,700	2,870	19,380	2,840
2036	65,490	7,150	2.3%	21.0%	16,890	2,080	3,320	22,290	2,910
2041	72,240	6,750	2.0%	21.7%	19,030	2,450	3,710	25,190	2,900
2046	78,000	5,760	1.5%	19.1%	20,700	2,760	4,040	27,500	2,310
2051	83,470	5,470	1.4%	18.5%	22,310	3,070	4,310	29,690	2,190
2021-51 Growth		**38,980**	**2.1%**	**20.1%**	**11,620**	**2,150**	**2,500**	**16,270**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	10,680				0	8,390	700	1,600	10,690
2021	11,810	1,130	2.0%	17.6%	0	9,540	660	1,610	11,810
2026	14,270	2,460	3.9%	19.3%	0	11,310	1,340	1,630	14,280
2031	16,520	2,250	3.0%	19.4%	0	12,990	1,890	1,650	16,530
2036	19,230	2,710	3.1%	20.4%	310	14,370	2,870	1,670	19,220
2041	22,010	2,780	2.7%	21.2%	740	15,660	3,910	1,690	22,000
2046	25,320	3,310	2.8%	20.2%	1,100	17,010	5,510	1,700	25,320
2051	28,310	2,990	2.3%	21.0%	1,550	18,350	6,710	1,710	28,320
2021-51 Growth		**16,500**	**3.0%**	**20.3%**	**1,550**	**8,810**	**6,050**	**100**	**16,510**



Essa

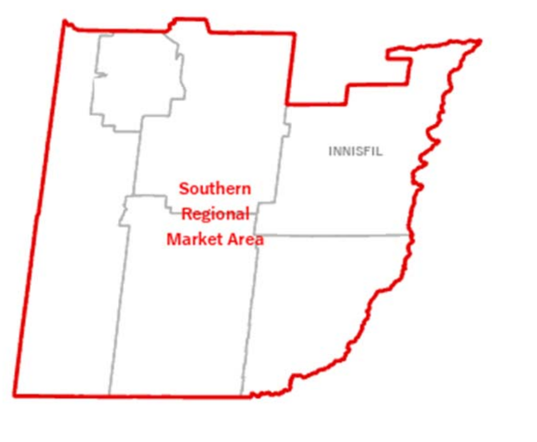
Population Age Structure 2021 and 2051



FORECAST RESULTS

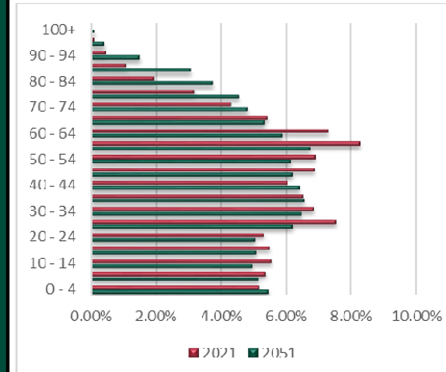
Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	19,030				5,690	300	430	6,420	
2016	21,820	2,790	2.8%	9.3%	6,300	420	470	7,190	770
2021	23,810	1,990	1.8%	4.3%	6,850	610	490	7,950	760
2026	26,470	2,660	2.1%	7.6%	7,510	820	530	8,860	910
2031	28,230	1,760	1.3%	5.1%	8,100	1,030	560	9,690	830
2036	29,910	1,680	1.2%	4.9%	8,680	1,230	590	10,500	810
2041	31,500	1,590	1.0%	5.1%	9,280	1,430	630	11,340	840
2046	33,140	1,640	1.0%	5.4%	9,780	1,630	650	12,060	720
2051	34,740	1,600	0.9%	5.4%	10,260	1,820	680	12,760	700
2021-51 Growth		**10,930**	**1.3%**	**5.6%**	**3,410**	**1,210**	**190**	**4,810**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	9,160				0	6,020	690	2,450	9,160
2021	9,630	470	1.0%	7.3%	0	6,470	690	2,470	9,630
2026	10,240	610	1.2%	4.8%	0	6,950	750	2,540	10,240
2031	10,850	610	1.2%	5.3%	0	7,430	810	2,620	10,860
2036	11,410	560	1.0%	4.2%	0	7,810	900	2,690	11,400
2041	11,920	510	0.9%	3.9%	0	8,160	1,010	2,760	11,930
2046	12,530	610	1.0%	3.7%	0	8,580	1,170	2,790	12,540
2051	13,090	560	0.9%	3.9%	0	8,990	1,290	2,820	13,100
2021-51 Growth		**3,460**	**1.0%**	**4.3%**	**-**	**2,520**	**600**	**350**	**3,470**



Innisfil

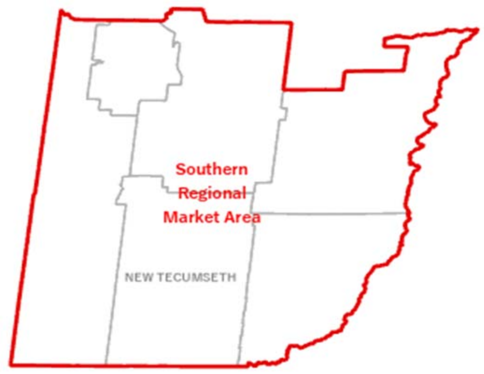
Population Age Structure 2021 and 2051



FORECAST RESULTS

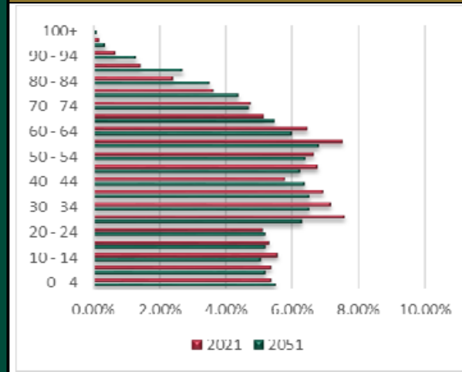
Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Rows	Apartments	Total	Growth
2011	33,660				11,520	440	350	12,310	
2016	37,850	4,190	2.4%	13.9%	12,460	550	360	13,370	1,060
2021	44,710	6,860	3.4%	14.9%	14,320	1,030	360	15,710	2,340
2026	51,630	6,920	2.9%	19.8%	16,350	1,590	650	18,590	2,880
2031	57,370	5,740	2.1%	16.6%	18,150	2,110	930	21,190	2,600
2036	64,160	6,790	2.3%	20.0%	20,320	2,640	1,340	24,300	3,110
2041	70,860	6,700	2.0%	21.5%	22,560	3,160	1,830	27,550	3,250
2046	77,700	6,840	1.9%	22.7%	24,570	3,710	2,310	30,590	3,040
2051	84,450	6,750	1.7%	22.9%	26,510	4,240	2,840	33,590	3,000
2021-51 Growth		**39,740**	**2.1%**	**20.5%**	**12,190**	**3,210**	**2,480**	**17,880**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Pop-Related	Emp. Land	Rural	Total
2016	8,680				0	3,610	1,340	3,730	8,680
2021	9,980	1,300	2.8%	20.2%	0	4,970	1,270	3,740	9,980
2026	12,870	2,890	5.2%	22.7%	0	6,950	2,150	3,760	12,860
2031	15,520	2,650	3.8%	22.8%	0	8,850	2,870	3,790	15,510
2036	18,750	3,230	3.9%	24.3%	310	10,460	4,160	3,820	18,750
2041	22,090	3,340	3.3%	25.4%	740	11,980	5,520	3,850	22,090
2046	26,410	4,320	3.6%	26.4%	1,100	13,790	7,650	3,860	26,400
2051	30,270	3,860	2.8%	27.1%	1,550	15,610	9,240	3,870	30,270
2021-51 Growth		**20,290**	**3.8%**	**24.9%**	**1,550**	**10,640**	**7,970**	**130**	**20,290**



New Tecumseth

Population Age Structure
2021 and 2051



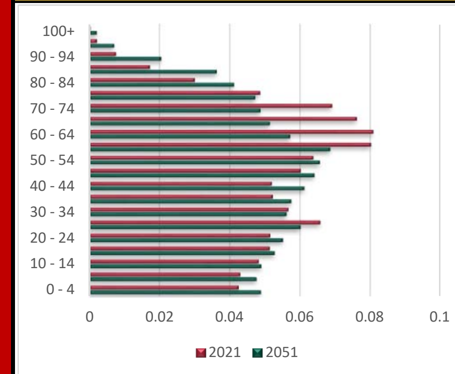
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	31,090				8,840	890	1,590	11,320	
2016	35,440	4,350	2.7%	14.5%	10,130	1,040	1,750	12,920	1,600
2021	45,480	10,040	5.1%	21.8%	11,760	1,490	2,600	15,850	2,930
2026	50,720	5,240	2.2%	15.0%	13,920	2,010	3,180	19,110	3,260
2031	57,050	6,330	2.4%	18.3%	15,860	2,500	3,740	22,100	2,990
2036	63,440	6,390	2.1%	18.8%	17,960	2,990	4,220	25,170	3,070
2041	69,570	6,130	1.9%	19.7%	20,120	3,470	4,710	28,300	3,130
2046	75,160	5,590	1.6%	18.6%	21,910	3,940	5,070	30,920	2,620
2051	80,590	5,430	1.4%	18.4%	23,640	4,390	5,420	33,450	2,530
2021-51 Growth		**35,110**	**1.9%**	**18.1%**	**11,880**	**2,900**	**2,820**	**17,600**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	19,600				0	6,650	10,600	2,350	19,600
2021	20,750	1,150	1.1%	17.9%	0	7,840	10,550	2,360	20,750
2026	22,470	1,720	1.6%	13.5%	0	9,060	11,030	2,380	22,470
2031	24,050	1,580	1.4%	13.6%	0	10,220	11,430	2,400	24,050
2036	25,820	1,770	1.4%	13.3%	0	11,260	12,140	2,430	25,830
2041	27,570	1,750	1.3%	13.3%	0	12,240	12,890	2,450	27,580
2046	29,750	2,180	1.5%	13.3%	0	13,240	14,060	2,450	29,750
2051	31,620	1,870	1.2%	13.1%	0	14,230	14,930	2,460	31,620
2021-51 Growth		**10,870**	**1.4%**	**13.4%**	**-**	**6,390**	**4,380**	**100**	**10,870**

RMA NORTH

Population Age Structure
2021 and 2051



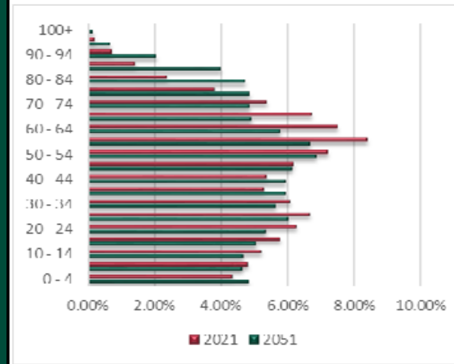
FORECAST RESULTS

Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type: Single/Semi	Rows	Apartments	Total	Growth
2011	160,950				54,390	2,070	6,310	62,770	
2016	171,640	10,690	1.3%	35.5%	58,140	2,840	7,230	68,210	5,440
2021	190,930	19,290	2.2%	41.8%	63,920	3,990	7,800	75,710	7,500
2026	204,320	13,390	1.4%	38.3%	69,880	5,410	8,590	83,880	8,170
2031	217,760	13,440	1.3%	38.9%	75,650	6,750	9,330	91,730	7,850
2036	229,660	11,900	1.1%	35.0%	80,980	8,090	10,130	99,200	7,470
2041	239,480	9,820	0.8%	31.6%	85,860	9,410	10,970	106,240	7,040
2046	249,640	10,160	0.8%	33.7%	89,920	10,470	11,730	112,120	5,880
2051	259,800	10,160	0.8%	34.4%	93,820	11,480	12,540	117,840	5,720
2021-51 Growth		**68,870**	**1.0%**	**35.4%**	**29,900**	**7,490**	**4,740**	**42,130**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type: Major Office	Pop-Related	Emp. Land	Rural	Total
2016	59,850				1,250	31,800	11,560	15,410	60,020
2021	62,300	2,450	0.8%	38.1%	1,270	34,190	11,410	15,570	62,440
2026	67,270	4,970	1.5%	39.0%	1,270	36,750	13,360	16,070	67,450
2031	71,750	4,480	1.3%	38.6%	1,270	39,200	14,770	16,650	71,890
2036	76,710	4,960	1.3%	37.4%	1,270	41,010	17,320	17,260	76,860
2041	81,390	4,680	1.2%	35.6%	1,270	42,540	20,030	17,710	81,550
2046	87,290	5,900	1.4%	36.1%	1,270	44,410	23,800	17,950	87,430
2051	92,200	4,910	1.1%	34.4%	1,270	46,250	26,640	18,170	92,330
2021-51 Growth		**29,900**	**1.3%**	**36.7%**	**-**	**12,060**	**15,230**	**2,600**	**29,890**

Clearview

Population Age Structure
2021 and 2051



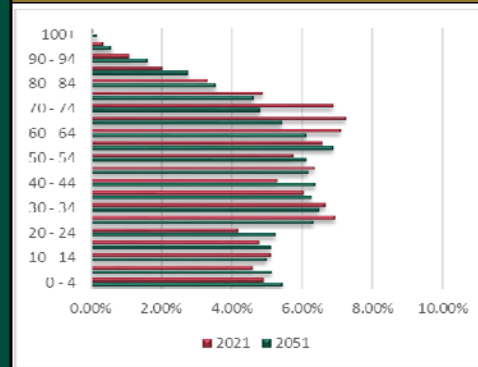
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	14,090				4,640	130	270	5,040	
2016	14,530	440	0.6%	1.5%	4,910	150	290	5,350	310
2021	15,220	690	0.9%	1.5%	5,050	210	310	5,570	220
2026	15,670	450	0.6%	1.3%	5,370	290	350	6,010	440
2031	17,420	1,750	2.1%	5.1%	6,110	360	380	6,850	840
2036	18,980	1,560	1.7%	4.6%	6,810	430	410	7,650	800
2041	20,260	1,280	1.3%	4.1%	7,450	500	450	8,400	750
2046	21,040	780	0.8%	2.6%	7,790	560	490	8,840	440
2051	21,820	780	0.7%	2.6%	8,120	610	520	9,250	410
2021-51 Growth		**6,600**	**1.2%**	**3.4%**	**3,070**	**400**	**210**	**3,680**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	4,280				0	2,290	400	1,580	4,270
2021	4,350	70	0.3%	1.1%	0	2,360	390	1,600	4,350
2026	4,590	240	1.1%	1.9%	0	2,440	490	1,660	4,590
2031	4,950	360	1.5%	3.1%	0	2,650	560	1,730	4,940
2036	5,350	400	1.6%	3.0%	0	2,840	700	1,800	5,340
2041	5,710	360	1.3%	2.7%	0	3,000	850	1,860	5,710
2046	6,020	310	1.1%	1.9%	0	3,090	1,050	1,880	6,020
2051	6,290	270	0.9%	1.9%	0	3,180	1,190	1,910	6,280
2021-51 Growth		**1,940**	**1.2%**	**2.4%**	**-**	**820**	**800**	**310**	**1,930**

Collingwood

Population Age Structure 2021 and 2051



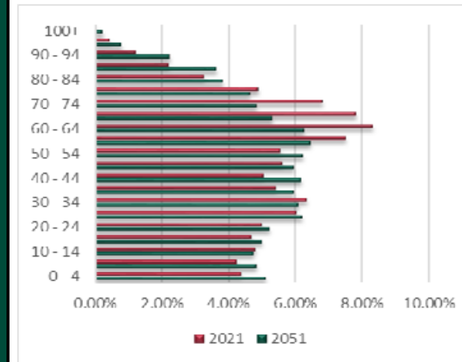
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	19,750				5,480	840	2,020	8,340	
2016	22,370	2,620	2.5%	8.7%	6,150	1,090	2,310	9,550	1,210
2021	25,470	3,100	2.6%	6.7%	6,860	1,620	2,690	11,170	1,620
2026	28,000	2,530	1.9%	7.2%	7,130	2,270	3,170	12,570	1,400
2031	31,410	3,410	2.3%	9.9%	7,990	2,870	3,640	14,500	1,930
2036	34,680	3,270	2.0%	9.6%	8,830	3,480	4,140	16,450	1,950
2041	37,590	2,910	1.6%	9.4%	9,590	4,080	4,680	18,350	1,900
2046	40,150	2,560	1.3%	8.5%	10,140	4,540	5,180	19,860	1,510
2051	42,690	2,540	1.2%	8.6%	10,660	4,990	5,720	21,370	1,510
2021-51 Growth		**17,220**	**1.7%**	**8.9%**	**3,800**	**3,370**	**3,030**	**10,200**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	11,620				0	7,250	3,960	410	11,620
2021	12,260	640	1.1%	9.9%	0	7,930	3,910	420	12,260
2026	13,470	1,210	1.9%	9.5%	0	8,370	4,650	440	13,460
2031	14,530	1,060	1.5%	9.1%	0	8,990	5,070	470	14,530
2036	15,770	1,240	1.7%	9.3%	0	9,460	5,800	510	15,770
2041	16,990	1,220	1.5%	9.3%	0	9,890	6,580	530	17,000
2046	18,420	1,430	1.6%	8.7%	0	10,360	7,510	540	18,410
2051	19,600	1,180	1.2%	8.3%	0	10,830	8,210	550	19,590
2021-51 Growth		**7,340**	**1.6%**	**9.0%**	**-**	**2,900**	**4,300**	**130**	**7,330**

Midland

Population Age Structure
2021 and 2051



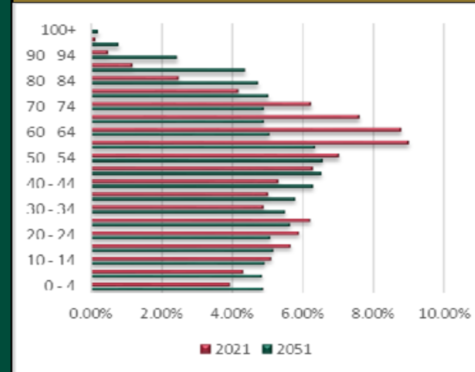
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	16,950				5,040	350	1,780	7,170	
2016	17,290	340	0.4%	1.1%	5,070	380	1,920	7,370	200
2021	18,250	960	1.1%	2.1%	5,440	470	1,930	7,840	470
2026	19,720	1,470	1.6%	4.2%	6,000	590	2,000	8,590	750
2031	20,850	1,130	1.1%	3.3%	6,520	710	2,060	9,290	700
2036	21,810	960	0.9%	2.8%	6,980	830	2,120	9,930	640
2041	22,610	800	0.7%	2.6%	7,410	950	2,180	10,540	610
2046	23,450	840	0.7%	2.8%	7,770	1,050	2,230	11,050	510
2051	24,290	840	0.7%	2.8%	8,120	1,150	2,280	11,550	500
2021-51 Growth		**6,040**	**1.0%**	**3.1%**	**2,680**	**680**	**350**	**3,710**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	10,710				0	6,870	3,530	310	10,710
2021	10,760	50	0.1%	0.8%	0	6,930	3,520	310	10,760
2026	11,160	400	0.7%	3.1%	0	7,180	3,670	310	11,160
2031	11,520	360	0.6%	3.1%	0	7,420	3,780	310	11,510
2036	11,890	370	0.6%	2.8%	0	7,600	3,990	310	11,900
2041	12,250	360	0.6%	2.7%	0	7,740	4,200	310	12,250
2046	12,750	500	0.8%	3.1%	0	7,920	4,520	310	12,750
2051	13,170	420	0.7%	2.9%	0	8,100	4,760	310	13,170
2021-51 Growth		**2,410**	**0.7%**	**3.0%**	**-**	**1,170**	**1,240**	**-**	**2,410**

Oro-Medonte

Population Age Structure
2021 and 2051



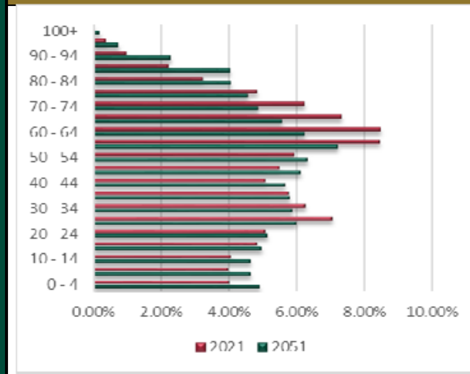
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	20,540				7,300	30	160	7,490	
2016	21,560	1,020	1.0%	3.4%	7,760	20	210	7,990	500
2021	23,770	2,210	2.0%	4.8%	8,370	50	220	8,640	650
2026	24,260	490	0.4%	1.4%	8,930	80	220	9,230	590
2031	25,080	820	0.7%	2.4%	9,440	110	220	9,770	540
2036	25,480	400	0.3%	1.2%	9,810	140	220	10,170	400
2041	25,750	270	0.2%	0.9%	10,150	170	220	10,540	370
2046	25,970	220	0.2%	0.7%	10,350	200	220	10,770	230
2051	26,230	260	0.2%	0.9%	10,530	230	220	10,980	210
2021-51 Growth		**2,460**	**0.3%**	**1.3%**	**2,160**	**180**	**-**	**2,340**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	5,700				0	320	1,140	4,240	5,700
2021	5,900	200	0.7%	3.1%	0	500	1,110	4,280	5,890
2026	6,690	790	2.5%	6.2%	0	660	1,620	4,420	6,700
2031	7,390	700	2.0%	6.0%	0	800	2,010	4,580	7,390
2036	8,320	930	2.4%	7.0%	0	870	2,710	4,750	8,330
2041	9,240	920	2.1%	7.0%	0	920	3,450	4,870	9,240
2046	10,470	1,230	2.5%	7.5%	0	980	4,550	4,940	10,470
2051	11,410	940	1.7%	6.6%	0	1,040	5,370	5,000	11,410
2021-51 Growth		**5,510**	**2.2%**	**6.8%**	**-**	**540**	**4,260**	**720**	**5,520**

Penetanguishene

Population Age Structure
2021 and 2051



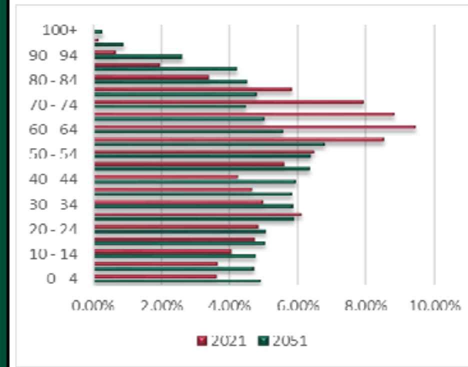
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	9,320				2,610	90	930	3,630	
2016	9,190	(130)	-0.3%	-0.4%	2,560	110	1,020	3,690	60
2021	10,340	1,150	2.4%	2.5%	2,820	120	1,030	3,970	280
2026	10,840	500	0.9%	1.4%	3,220	140	1,040	4,400	430
2031	11,600	760	1.4%	2.2%	3,590	160	1,060	4,810	410
2036	12,350	750	1.3%	2.2%	3,960	170	1,070	5,200	390
2041	12,980	630	1.0%	2.0%	4,310	190	1,080	5,580	380
2046	13,690	710	1.1%	2.4%	4,640	210	1,080	5,930	350
2051	14,390	700	1.0%	2.4%	4,960	220	1,090	6,270	340
2021-51 Growth		**4,050**	**1.1%**	**2.1%**	**2,140**	**100**	**60**	**2,300**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	4,830				0	3,680	1,000	310	4,990
2021	4,830	0	0.0%	0.0%	0	3,690	990	310	4,990
2026	5,060	230	0.9%	1.8%	0	3,900	1,010	310	5,220
2031	5,270	210	0.8%	1.8%	0	4,100	1,020	310	5,430
2036	5,440	170	0.6%	1.3%	0	4,240	1,040	310	5,590
2041	5,580	140	0.5%	1.1%	0	4,370	1,070	310	5,750
2046	5,780	200	0.7%	1.2%	0	4,530	1,100	310	5,940
2051	5,970	190	0.6%	1.3%	0	4,690	1,130	310	6,130
2021-51 Growth		**1,140**	**0.7%**	**1.4%**	**-**	**1,000**	**140**	**-**	**1,140**

Ramara

Population Age Structure
2021 and 2051



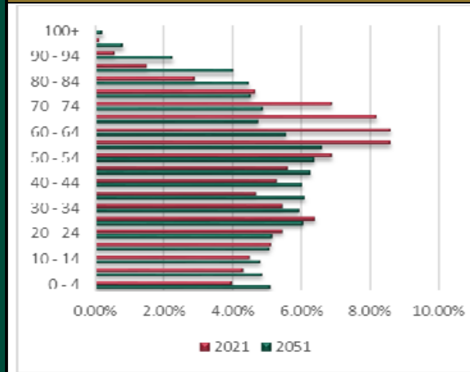
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	9,490				3,500	260	40	3,800	
2016	9,730	240	0.5%	0.8%	3,710	250	90	4,050	250
2021	10,680	950	1.9%	2.1%	4,070	250	90	4,410	360
2026	11,120	440	0.8%	1.3%	4,380	250	90	4,720	310
2031	11,550	430	0.8%	1.2%	4,670	250	90	5,010	290
2036	11,890	340	0.6%	1.0%	4,930	250	100	5,280	270
2041	12,150	260	0.4%	0.8%	5,160	250	100	5,510	230
2046	12,500	350	0.6%	1.2%	5,380	250	100	5,730	220
2051	12,870	370	0.6%	1.3%	5,590	250	100	5,940	210
2021-51 Growth		**2,190**	**0.6%**	**1.1%**	**1,520**	**-**	**10**	**1,530**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	5,270				0	3,050	340	1,880	5,270
2021	5,380	110	0.4%	1.7%	0	3,130	330	1,920	5,380
2026	5,710	330	1.2%	2.6%	0	3,230	450	2,040	5,720
2031	6,030	320	1.1%	2.8%	0	3,320	530	2,180	6,030
2036	6,400	370	1.2%	2.8%	0	3,380	690	2,320	6,390
2041	6,730	330	1.0%	2.5%	0	3,430	860	2,430	6,720
2046	7,110	380	1.1%	2.3%	0	3,510	1,110	2,490	7,110
2051	7,420	310	0.9%	2.2%	0	3,580	1,300	2,540	7,420
2021-51 Growth		**2,040**	**1.1%**	**2.5%**	**-**	**450**	**970**	**620**	**2,040**

Severn

Population Age Structure
2021 and 2051



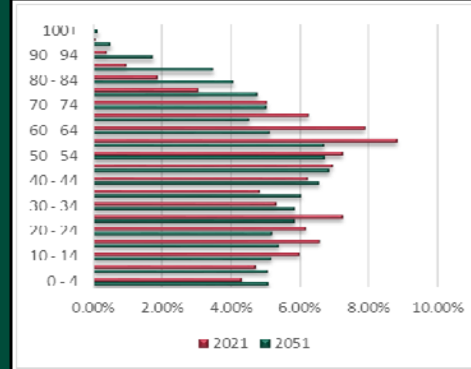
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	12,660				4,620	30	230	4,880	
2016	13,820	1,160	1.8%	3.9%	5,100	50	290	5,440	560
2021	14,750	930	1.3%	2.0%	5,460	50	290	5,800	360
2026	15,340	590	0.8%	1.7%	5,820	50	300	6,170	370
2031	15,830	490	0.6%	1.4%	6,160	60	310	6,530	360
2036	16,320	490	0.6%	1.4%	6,500	60	320	6,880	350
2041	16,700	380	0.5%	1.2%	6,820	60	320	7,200	320
2046	17,250	550	0.7%	1.8%	7,120	60	330	7,510	310
2051	17,790	540	0.6%	1.8%	7,410	70	330	7,810	300
2021-51 Growth		**3,040**	**0.6%**	**1.6%**	**1,950**	**20**	**40**	**2,010**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	3,950				0	1,410	250	2,290	3,950
2021	4,020	70	0.4%	1.1%	0	1,490	240	2,290	4,020
2026	4,260	240	1.2%	1.9%	0	1,600	370	2,290	4,260
2031	4,460	200	0.9%	1.7%	0	1,700	470	2,290	4,460
2036	4,720	260	1.1%	2.0%	0	1,780	640	2,290	4,710
2041	4,970	250	1.0%	1.9%	0	1,850	830	2,290	4,970
2046	5,340	370	1.4%	2.3%	0	1,950	1,100	2,290	5,340
2051	5,640	300	1.1%	2.1%	0	2,040	1,310	2,290	5,640
2021-51 Growth		**1,620**	**1.1%**	**2.0%**	**-**	**550**	**1,070**	**-**	**1,620**

Springwater

Population Age Structure
2021 and 2051



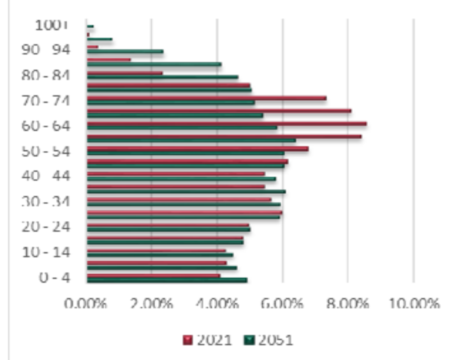
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	18,700				5,940	30	300	6,270	
2016	19,560	860	0.9%	2.9%	6,310	20	380	6,710	440
2021	22,320	2,760	2.7%	6.0%	7,110	20	390	7,520	810
2026	24,940	2,620	2.2%	7.5%	8,330	80	410	8,820	1,300
2031	26,600	1,660	1.3%	4.8%	9,080	140	420	9,640	820
2036	28,280	1,680	1.2%	4.9%	9,880	200	440	10,520	880
2041	29,470	1,190	0.8%	3.8%	10,550	250	460	11,260	740
2046	30,990	1,520	1.0%	5.0%	11,200	300	480	11,980	720
2051	32,490	1,500	0.9%	5.1%	11,820	340	490	12,650	670
2021-51 Growth		**10,170**	**1.3%**	**5.2%**	**4,710**	**320**	**100**	**5,130**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	6,390				1,250	2,280	620	2,240	6,390
2021	6,700	310	1.0%	4.8%	1,270	2,570	610	2,250	6,700
2026	7,250	550	1.6%	4.3%	1,270	2,950	760	2,270	7,250
2031	7,580	330	0.9%	2.8%	1,270	3,150	870	2,290	7,580
2036	7,990	410	1.1%	3.1%	1,270	3,360	1,050	2,310	7,990
2041	8,360	370	0.9%	2.8%	1,270	3,500	1,250	2,330	8,350
2046	8,810	450	1.1%	2.8%	1,270	3,680	1,510	2,340	8,800
2051	9,190	380	0.8%	2.7%	1,270	3,860	1,710	2,350	9,190
2021-51 Growth		**2,490**	**1.1%**	**3.1%**	**-**	**1,290**	**1,100**	**100**	**2,490**

Tay

Population Age Structure
2021 and 2051



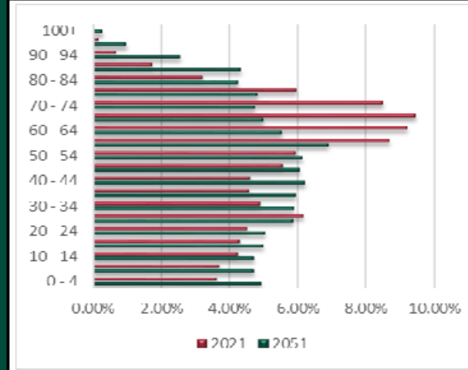
FORECAST RESULTS

Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type: Single/Semi	Rows	Apartments	Total	Growth
2011	9,960				3,790	30	120	3,940	
2016	10,290	330	0.7%	1.1%	3,950	50	130	4,130	190
2021	11,410	1,120	2.1%	2.4%	4,330	50	160	4,540	410
2026	11,770	360	0.6%	1.0%	4,610	50	180	4,840	300
2031	12,160	390	0.7%	1.1%	4,870	50	200	5,120	280
2036	12,420	260	0.4%	0.8%	5,070	50	220	5,340	220
2041	12,600	180	0.3%	0.6%	5,260	50	240	5,550	210
2046	12,860	260	0.4%	0.9%	5,420	50	250	5,720	170
2051	13,130	270	0.4%	0.9%	5,580	50	270	5,900	180
2021-51 Growth		**1,720**	**0.5%**	**0.9%**	**1,250**	**-**	**110**	**1,360**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type: Major Office	Pop-Related	Emp. Land	Rural	Total
2016	1,450				0	720	60	680	1,460
2021	1,570	120	1.6%	1.9%	0	810	50	700	1,560
2026	1,770	200	2.4%	1.6%	0	910	80	780	1,770
2031	1,970	200	2.2%	1.7%	0	1,000	100	870	1,970
2036	2,160	190	1.9%	1.4%	0	1,050	140	970	2,160
2041	2,310	150	1.4%	1.1%	0	1,090	180	1,040	2,310
2046	2,470	160	1.3%	1.0%	0	1,150	240	1,080	2,470
2051	2,610	140	1.1%	1.0%	0	1,220	280	1,110	2,610
2021-51 Growth		**1,040**	**1.7%**	**1.3%**	**-**	**410**	**230**	**410**	**1,050**

Tiny

Population Age Structure 2021 and 2051



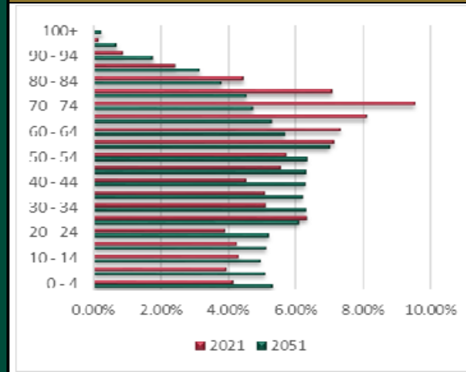
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2011	11,490				4,520	0	100	4,620	
2016	12,080	590	1.0%	2.0%	4,800	10	110	4,920	300
2021	13,240	1,160	1.9%	2.5%	5,320	10	110	5,440	520
2026	13,960	720	1.1%	2.1%	5,690	10	110	5,810	370
2031	14,440	480	0.7%	1.4%	6,030	10	110	6,150	340
2036	14,870	430	0.6%	1.3%	6,360	10	110	6,480	330
2041	15,200	330	0.4%	1.1%	6,660	10	110	6,780	300
2046	15,600	400	0.5%	1.3%	6,910	10	110	7,030	250
2051	16,010	410	0.5%	1.4%	7,150	10	110	7,270	240
2021-51 Growth		**2,770**	**0.6%**	**1.4%**	**1,830**	**-**	**-**	**1,830**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	1,430				0	90	30	1,310	1,430
2021	1,570	140	1.9%	2.2%	0	210	30	1,330	1,570
2026	1,740	170	2.1%	1.3%	0	320	30	1,390	1,740
2031	1,910	170	1.9%	1.5%	0	420	30	1,460	1,910
2036	2,060	150	1.5%	1.1%	0	500	30	1,530	2,060
2041	2,170	110	1.0%	0.8%	0	550	30	1,580	2,160
2046	2,280	110	1.0%	0.7%	0	630	30	1,610	2,270
2051	2,390	110	0.9%	0.8%	0	710	30	1,640	2,380
2021-51 Growth		**820**	**1.4%**	**1.0%**	**-**	**500**	**-**	**310**	**810**

Wasaga Beach

Population Age Structure 2021 and 2051



FORECAST RESULTS

Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Rows	Apartments	Total	Growth
2011	18,000				6,950	280	360	7,590	
2016	21,220	3,220	3.3%	10.7%	7,820	710	480	9,010	1,420
2021	25,480	4,260	3.7%	9.2%	9,090	1,140	580	10,810	1,800
2026	28,700	3,220	2.4%	9.2%	10,400	1,600	720	12,720	1,910
2031	30,820	2,120	1.4%	6.1%	11,190	2,030	840	14,060	1,340
2036	32,580	1,760	1.1%	5.2%	11,850	2,470	980	15,300	1,240
2041	34,170	1,590	1.0%	5.1%	12,500	2,900	1,130	16,530	1,230
2046	36,140	1,970	1.1%	6.5%	13,200	3,240	1,260	17,700	1,170
2051	38,090	1,950	1.1%	6.6%	13,880	3,560	1,410	18,850	1,150
2021-51 Growth		**12,610**	**1.3%**	**6.5%**	**4,790**	**2,420**	**830**	**8,040**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Pop-Related	Emp. Land	Rural	Total
2016	4,220				0	3,840	230	160	4,230
2021	4,960	740	3.3%	11.5%	0	4,570	230	160	4,960
2026	5,570	610	2.3%	4.8%	0	5,190	230	160	5,580
2031	6,140	570	2.0%	4.9%	0	5,650	330	160	6,140
2036	6,610	470	1.5%	3.5%	0	5,930	530	160	6,620
2041	7,080	470	1.4%	3.6%	0	6,200	730	160	7,090
2046	7,840	760	2.1%	4.6%	0	6,610	1,080	160	7,850
2051	8,510	670	1.7%	4.7%	0	7,000	1,350	160	8,510
2021-51 Growth		**3,550**	**1.8%**	**4.4%**	**-**	**2,430**	**1,120**	**-**	**3,550**