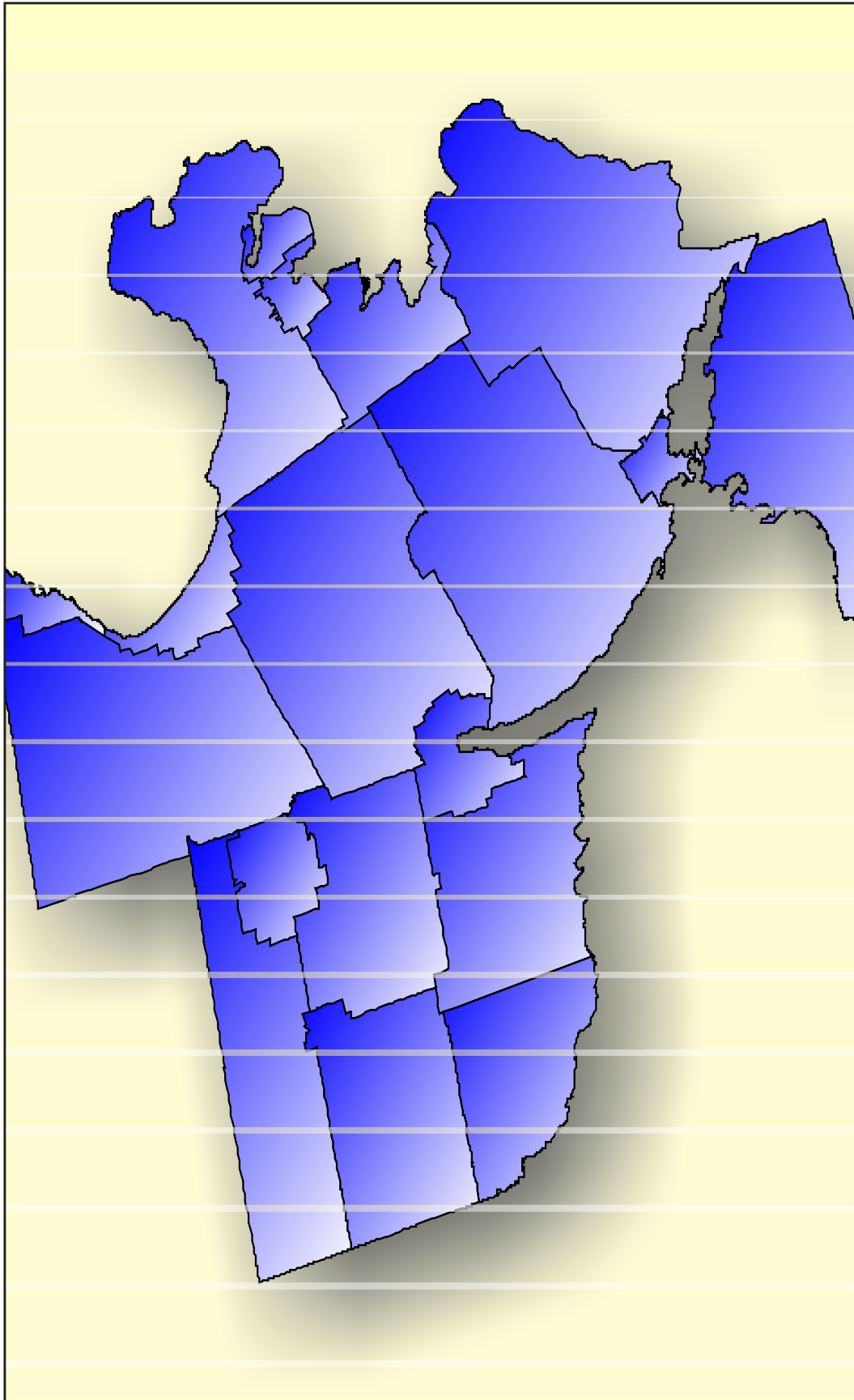


March
2006



*Existing Capacities Assessment
Communities Report*

**Intergovernmental Action Plan
for Simcoe, Barrie & Orillia**



Ainley Group
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EXECUTIVE SUMMARY

1. INTRODUCTION

- 1.1 The Provincial Government, area municipalities in Simcoe County as well as the Cities of Barrie and Orillia are partnering to develop an *Intergovernmental Action Plan* (IGAP) for Simcoe, Barrie and Orillia.
- 1.2 The desired outcomes of the IGAP are:
- A defined growth (assimilative) capacity of the Lake Simcoe and Nottawasaga River watersheds;
 - Development (servicing) certainty for intensification and approved growth;
 - Defined capacity for Barrie and area's additional growth; and,
 - Effective and sustainable municipal governance.
- 1.3 Upon completion of the planning process, it is expected that the IGAP partners will have a basis for:
- A long-term urban structure plan for Simcoe County and the Cities of Barrie and Orillia;
 - A sustainable infrastructure strategy for Simcoe, Barrie and Orillia;
 - Development certainty for affected stakeholders; and,
 - A suitable governance structure and/or service coordination mechanisms to manage future growth and development.
- 1.4 The IGAP encompasses four-phases. Phase I is an Assimilative Capacity Study (ACS) of the Nottawasaga River and Lake Simcoe watersheds. Phase II is an Environmental Scan (ES) and Phase III (Part 1) an Existing Capacities Assessment (ECA) which are being undertaken by Dillon Consulting in association with the Ainley Group, Clara Consulting, Bourrie & Associates and EDP Consulting. Phase III (Part 2) – Growth Potential Assessment and Phase IV - Implementation Assessment were initiated in February 2006.
- 1.5 The purpose of the Phase II ES is to assemble a sound and defensible database on infrastructure and services and determine existing capacity to accommodate approved development and planned growth.

- 1.6 The ES includes a review of approved development and planned land use in settlement areas, existing and planned water and sanitary sewage infrastructure, natural and cultural heritage resources, transportation facilities, public service facilities and economic indicators.
- 1.7 The results of the ES are documented in three foundation reports: this Communities Report, a Resources Report (under separate cover) and an Infrastructure Assessment Report (under separate cover).
- 1.8 This Communities Report documents the situation in the municipally serviced (full and water only) settlement areas with regards to existing land use, approved development and planned land use. It also provides an overview of public service facilities and a snapshot of the economic base of the study area.
- 1.9 The information in the foundation reports will be synthesized with the results of the ACS in the SWOT Analysis in Phase III (Part 1) – ECA of the IGAP process.

2. APPROACH

- 2.1 The IGAP study area encompasses the County of Simcoe and the City of Barrie and the City of Orillia. The study area is approximately 4900 square kilometres in area and had a Census 2001 population of 377,050 persons.
- 2.2 Data for this report was provided by the Provincial Government, the County of Simcoe and area municipalities, the Cities of Barrie and Orillia and key organizations in the study area. This report is based on secondary source material and no primary data collection was undertaken.

3. POLICY CONTEXT FOR THE COMMUNITY ANALYSIS

- 3.1 The discussion of a long-term sustainable urban structure for the study area must be done in the context of the existing policy framework and policy permissions reflected in approved planning documents.
- 3.2 Land use planning is a matter of provincial interest, responsibility of which is vested in the Minister of Municipal Affairs and Housing. Recent legislative changes by the Province have strengthened the role that municipalities have in planning decisions related to growth.
- 3.3 The provincial planning context is strategically evolving in recognition of the need to address good land use planning through enabling legislation and broad policy direction and implementation.

- 3.4 The Provincial Government is committed to providing strong planning leadership. Provincial policy requires the integration of economic, environmental and community planning to identify where growth should occur as well as protect the natural environment and cultural heritage resources for future generations.
- 3.5 The Provincial planning policy framework with regards to the study area includes the Provincial Policy Statement 2005 (PPS), Niagara Escarpment Plan, Oak Ridges Moraine Conservation Plan, Greenbelt Plan and the Places to Grow Proposed Growth Plan for the Greater Golden Horseshoe.
- 3.6 Working in tandem with the Greenbelt Plan and Provincial Policy Statement, the Proposed Growth Plan for the Greater Golden Horseshoe is part of the broader policy framework for implementing the Provincial vision for building stronger, prosperous communities through better management of growth. The vision is for compact settlement and development patterns that are capable of providing diverse opportunities to work, live and participate in community life. A significant portion of the new growth is to be accommodated in existing urban areas. Greenfield development is to be planned at higher densities, and the conversion of rural/agricultural lands to urban uses will be carefully managed.

4. EXISTING COMMUNITY CONTEXT IN THE STUDY AREA

- 4.1 The 2001 population of the study area is 377,050 persons. The total number of private dwellings in the study area is 162,520 units.
- 4.2 The *Population, Households, and Employment Forecasts Update* dated May 2004 (Hemson) forecasted growth for the study area of 241,150 persons, 112,659 households and 110,490 jobs between 2001 and 2026. The southern portion of the study area and the Highway 400 corridor to Barrie (New Tecumseth, Bradford-West Gwillimbury, Innisfil and Barrie) is expected to experience the majority of forecasted growth – 67% of the population increase and 75% of the employment increase. The shoreline area in and around Wasaga Beach and Collingwood will also absorb a significant portion of the forecasted growth – about 10% of the population and 7.5% of the employment increase.
- 4.3 The subsequent *Growth Outlook for the Greater Golden Horseshoe* dated January 2005 (Hemson) indicated that "the pace of growth is more rapid than previously anticipated and may result in a doubling of population for some municipalities." The Greater Golden Horseshoe forecasts indicated that the study area will continue to experience significant growth pressure, due to proximity to the Greater Toronto Area. The population will range from 636,000 to 691,000 people depending upon the growth scenario.
- 4.4 Simcoe County comprises 16 Towns and Townships. The Cities of Barrie and Orillia are separated municipalities and are not part of the County. Those two urban areas contain approximately 134,000 people (2001).

4.5 The settlement structure in the study area is as follows:

- The dominant urban area is the City of Barrie with a population of over 100,000 persons. This represents 28% of the study area's population.
- There is a group of municipalities in the 20-30,000 population (2001) range. These municipalities include Bradford-West Gwillimbury, Innisfil, New Tecumseth, and Orillia. Together, they comprise 28% of the study area's population. and
- The smaller municipalities are more rural in nature and have small settlement areas. They account for the remaining 44% of the population.

Across the study area, the population is 71% urban and 29% rural.

4.6 The settlement areas in the study area are serviced by either municipal water and sanitary sewer services, municipal water services and private sewage disposal or private water supply and private sewage disposal.

4.7 In the study area the County of Simcoe, its lower tier municipalities as well as the Cities of Barrie and Orillia have statutory approved official plans. Many of the official plans pre-date the most recent provincial policy reform and will need some updating to be consistent with the new Provincial Policy Statement.

4.8 The municipal planning policy structure in the study area directs most of the non-resource growth and development to the settlement areas. The County Official Plan promotes development in settlement areas in an effort to conserve land for natural heritage protection and/or resource development and provide more efficient delivery of municipal services. The County Plan states that local Official Plans are responsible for identifying the extent of growth through the preparation of growth management studies and detailed secondary plans.

4.9 Many of the municipalities in the study area have completed growth management studies. The most recent studies generally recognize Provincial policy but not necessarily the requirements for intensification/in-filling. The projection methodology varies between the different studies.

5. DESCRIPTION OF EXISTING LAND USES AND DEVELOPMENT SITUATION IN THE STUDY AREA

5.1 Development inventory information was requested from all local municipalities in the study area. The following provides a summary of the results of the development inventory. Additional details are provided in the main body of the report with breakdowns by municipality and by dwelling type.

Comparison of Development Inventories by Water and Sanitary Sewage Area		
	Within Water Service Area	Within Sanitary Sewage Service Area
Total number of units	46,383	41,371
Number of approved units	9,720	9,161
Number of draft approved units	18,243	16,320
Number of units in applications being reviewed	18,420	15,890
Total population potential	128,891	114,977
Population estimate in approved units	26,638	25,441
Population estimate in draft approved units	51,357	45,834
Population estimate in units in applications being reviewed	50,897	43,702

5.2 Based on information from the County of Simcoe, development applications which propose new settlements or expansion of existing urban area boundaries have been identified in Bradford-West Gwillimbury, Innisfil, New Tecumseth, Oro-Medonte, Essa, Wasaga Beach and Tay. These applications are illustrated in *Figure 5.1*. Major secondary plans for development within urban areas are underway in Collingwood and Springwater.

6. DESCRIPTION OF PLANNED LAND USE

6.1 Intensification: A gross estimation of intensification was undertaken for the main street and downtown areas of settlement areas which are fully serviced and have policies in place which encourage intensification and mixed use development. A policy-permission approach was applied and physical constraints to development were not taken into consideration. There is a potential for 1,794 low density units, 13,326 medium density units, or 27,218 high density units of intensification in the study. As part of the next phase of the IGAP process, intensification potential will be further assessed to take physical and market considerations into account.

6.2 In-fill: In-fill potential was considered in designated settlement areas serviced by municipal water supply and private sewage disposal. There is a potential for 113 low density units through in-fill. This does not account for individual vacant lots of record in the rural area of Simcoe County.

6.3 Vacant Lands: Local municipalities provided information on vacant, designated residential lands which were not constrained by significant environmental features and not subject to a development application. The lands were described in hectares and the

residential mix / densities described in Official Plans were used to determine the unit yield. Using this approach, there are 3,106 hectares of vacant residential lands in the study area with the potential to accommodate approximately 117,698 persons.

- 6.4 **Summary of Population Potential:** A summary of the total population potential, by water service area and by sewage service area, has been prepared by compiling the information on development inventory, vacant lands, intensification, and in-fill. Pending the more in-depth assessment of intensification potential in the next phase of IGAP, four population potential scenarios have been created for the analysis of the gap between population potential and water and sewage servicing, one assuming no intensification and three levels of intensification based on density (low density, medium density, high density). The results are provided below.

Comparison of Population Potential by Water and Sewage Serviced Areas		
	Total Population Potential within Water Serviced Area	Total Population Potential within Sewage Serviced Area
Scenario 1: No intensification	243,692 persons	213,893 persons
Scenario 2: Low intensification	248,750 persons	218,951 persons
Scenario 3: Medium intensification	280,859 persons	251,061 persons
Scenario 4: High intensification	317,440 persons	287,642 persons

- 6.5 Considering that the projected population increase (2001-2031) for the study area is 275,000 (based on Places to Grow, November 2005), the summary population potential represents 78% to 105% of the projected population growth of the study area within sewage serviced areas. In water serviced areas, the summary population potential represents 89% to 115% of the projected population growth. These numbers will be revisited in Phase III – Growth Potential Assessment of IGAP.

7. PUBLIC SERVICE FACILITIES

- 7.1 The focus of investigation has been on the following Public Service Facilities: health facilities with an emphasis on hospitals; educational facilities with an emphasis on elementary and secondary schools; and, recreational and cultural facilities of a larger scale and regional significance.
- 7.2 This section describes current facilities and the magnitude of current and planned capital expenditures to meet planned growth.
- 7.3 The seven hospitals serving the study area have been expanding their facilities or have plans for expansion to serve the planned growth.
- 7.4 The Simcoe County District School Board has been planning for a net increase of 3,869 pupils at the elementary level and 7,609 pupils at the secondary level by 2018. The

Simcoe Muskoka Catholic District School Board is planning for a net increase of 2,464 pupils at the elementary level and 2,391 pupils at the secondary level in the same time period. The Boards have indicated that expansion of school facilities is most needed in Barrie and South Simcoe

- 7.5 Major new recreational facilities are being built in eight of the local municipalities to serve growing populations.

8.0 ECONOMIC BASE ANALYSIS

- 8.1 The high level economic base analysis identifies economic trends and activity, including the relative importance of specific sectors taking into consideration municipal economic development strategies.
- 8.2 Economic activity within the study area is concentrated in Barrie. Smaller concentrations also exist in South Simcoe, Orillia, Midland and Collingwood.
- 8.3 Communities which have a concentration in the manufacturing sector include: Barrie, New Tecumseth (due to the presence of Honda), Midland, and Bradford-West Gwillimbury.
- 8.4 Communities which have a high level of tourism related employment include Barrie, Orillia, Collingwood, Wasaga Beach, and Midland. Tourism is also important to the rural areas in the study area and is associated with outdoor recreational opportunities such as trails/boating and the natural environment.
- 8.5 While a relatively small number of people in the study area are involved in farming, the agriculture sector includes linkages to agricultural related industries such as fertilizer manufacturing, food processing, agricultural equipment, veterinary medicine, government services, etc. Farming is the most prosperous in South Simcoe, accounting for about 53% of the county's gross farm receipts.
- 8.6 The majority of economic growth in the study area will be in Barrie. There will also be a demand for employment lands in South Simcoe, particularly New Tecumseth and Bradford-West Gwillimbury, given the area's proximity to the Greater Toronto Area. The demand for employment lands in South Simcoe will need to be balanced against the need to preserve agricultural land.

1. INTRODUCTION

1.1 Context for this Report

The Province and municipalities in Simcoe County, as well as the Cities of Barrie and Orillia, recognize the need to plan for long-term population growth and a healthy environment. Since August of 2004, the Province has been in discussions with the municipalities in south Simcoe, where current growth pressures appear to be most pressing. The purpose of these discussions was to determine how best to address common concerns in a cost effective and timely manner. Resulting from the discussion was the development of an *Intergovernmental Action Plan* (IGAP) for the County of Simcoe, and the Cities of Barrie and Orillia.

The four desired outcomes of the IGAP are:

1. A defined growth (assimilative) capacity of the Lake Simcoe and Nottawasaga River watersheds;
2. Development (servicing) certainty for intensification and approved growth;
3. Defined capacity for Barrie and area's additional growth; and,
4. Effective and sustainable municipal governance.

The purpose of the IGAP is to provide the affected municipalities with the proper tools to assist them in their planning and development decision-making. Upon completion of the IGAP, it is expected that the participating governments will have a basis for:

- A long-term urban structure plan for Simcoe County and the Cities of Barrie and Orillia;
- A sustainable infrastructure strategy for Simcoe, Barrie and Orillia;
- Development certainty for affected stakeholders; and,
- A suitable governance structure and/or service coordination mechanisms to manage future growth and development.

The Province's Strong Communities program includes developing long-range planning solutions for Central Ontario. Multiple interrelated initiatives are in-place, including, the Growth Plan for the Greater Golden Horseshoe, Planning Reform, Watershed-based Source Water Protection Planning, Golden Horseshoe Greenbelt, and the 10-Year Strategic Infrastructure Investment Plan.

Unique growth and development challenges exist in Simcoe County and the Cities of Barrie and Orillia (study area). South Simcoe and Barrie, in particular, are experiencing increased development pressure, and are expected to continue to have rapid growth. A number of the municipalities in the study area rely on inland water systems which have been demonstrated to be under strain (for example the Lake Simcoe watershed has known issues as a result of phosphorous loadings). Without intervening action, the available potable water and aquaculture of these watersheds are threatened.

Through their approved official plans, the municipalities in the study area make provision for a significant amount of growth. At the same time, several major developments are being proposed that involve the establishment of new urban settlement areas or the expansion of existing urban areas. Based on current conditions, there may be insufficient existing sewer and/or water capacity to accommodate approved development and/or planned land uses within existing settlement areas.

In order to accommodate planned growth, several major infrastructure municipal class environmental assessments are underway and/or nearing completion. However, these studies have not been undertaken in a comprehensive or coordinated fashion.

The municipalities in the study area are also under increasing administrative and financial capacity constraints.

By February 2005, the Province and the municipalities in the study area had agreed to partner in the IGAP, which has resulted in the commissioning of this study.

The partnership is made up of the following Provincial Ministries and municipalities:

Provincial Ministries include:

- Municipal Affairs and Housing
- Environment
- Public Infrastructure Renewal
- Natural Resources

Municipalities include:

- Simcoe County
- Township of Adjala-Tosorontio
- Town of Bradford West Gwillimbury
- City of Barrie
- Township of Clearview
- Town of Collingwood
- Township of Essa
- Town of Innisfil
- Town of Midland

- Town of New Tecumseth
- City of Orillia
- Township of Oro-Medonte
- Town of Penetanguishene
- Township of Ramara
- Township of Severn
- Township of Springwater
- Township of Tay
- Township of Tiny, and
- Town of Wasaga Beach

The partners want to further their common interests in:

- Protecting the environment, including the water quality and quantity of the Nottawasaga River and Lake Simcoe watersheds.
- Fiscally sustainable growth, through efficient, cost-effective development and land use patterns.
- Effective municipal governance and service delivery, through inter-governmental cooperation and coordination.

The IGAP proposes a four-phase approach to address the above-noted matters of common interest. Phase I of the IGAP is an analysis of assimilative capacity of the Nottawasaga River and Lake Simcoe watersheds by the Lake Simcoe Region (LSRCA) and Nottawasaga Valley (NVCA) Conservation Authorities. Phase II of the IGAP is an Environmental Scan and Phase III (Part 1) an Existing Capacities Assessment which are being undertaken by Dillon Consulting in association with the Ainley Group, Clara Consulting, Bourrie & Associates and EDP Consulting. Phase III (Part 2) – Growth Potential Assessment and Phase IV - Implementation Assessment of the IGAP were initiated in February 2006.

This Communities Report is one component of the Phase II Environmental Scan (ES) for the IGAP. The purpose of the ES is to:

- Assemble a sound and defensible database on infrastructure and services; and
- Determine existing capacity to accommodate approved development and growth.

The ES includes a review of:

- Approved development and planned land use in settlement areas;
- Existing and planned water and sanitary sewage infrastructure;
- Natural and cultural heritage resources;

- Transportation facilities;
- Public service facilities; and
- Economic indicators.

The results of the ES are documented in three foundation reports: this Communities Report, a Resources Report (under separate cover) and an Infrastructure Assessment Report (under separate cover). The results of the ES will be synthesized with the results of the Assimilative Capacity Study in the SWOT Analysis in Phase III (Part 1) – ECA of the IGAP program. In the SWOT Analysis, key planning principles concerning growth management will be applied. The ECA will provide a defensible base of foundation information for Phases III (Part 2) and IV of the IGAP process.

1.2 Purpose of this Report

This Communities Report documents the situation in the municipally serviced (full and water only) settlement areas with regards to existing land use, approved development and planned land use. It also provides an overview of public service facilities and a snapshot of the economic base of the study area.

The Infrastructure Assessment Report quantifies and analyzes the capacities of the existing municipal infrastructure within the study area and describes any issues related to the water, sanitary sewer, stormwater and transportation infrastructure.

The Resources Report describes existing resources and associated issues in the study area in regards to natural heritage, agriculture, mineral aggregates and natural hazards.

1.3 Format of the Report

This Communities Report is divided into eight main sections as shown in the Table of Contents. The Introduction provides the context and purpose of this report in regards to IGAP. Section 2.0 describes the study area, data sources and the approach to data collection/analysis. Section 3.0 describes the Provincial policy context for the report and Section 4.0 describes the existing planning context for the study area. Section 5.0 describes the development potential in the existing settlement areas based on current development applications. Section 6.0 describes the development potential (through intensification/redevelopment/infill in built-up areas and development of vacant, designated lands not under application) in the existing settlement areas based on official plan policy permissions. Section 7.0 describes the regional level public service facilities and Section 8.0 describes the economic trends and activity in the study area.

2. APPROACH

2.1 Study Area Description

The IGAP study area comprises the County of Simcoe and its lower-tier municipalities, as well as the City of Barrie and the City of Orillia. The study area is approximately 4900 square kilometres in area and had a Census 2001 population of 377,050 persons.

The study area is located in the northerly portion of the Greater Golden Horseshoe (GGH); an area of urban development centred on the north and west shores of Lake Ontario. It is generally bounded on the north by Georgian Bay and the District of Muskoka; on the west by Grey County and Dufferin County; on the south by the Regions of Peel and York, as well as Lake Simcoe; and on the east by Lake Simcoe and the City of Kawartha Lakes (see *Figure 2.1*).

The study area is part of one of the fastest growing urban areas in Canada. In the *Places to Grow* discussion paper prepared by the Province, it was noted that from 2001 to 2031 the GGH is expected to grow by almost four million people and its economy is expected to grow by about two million jobs. The study area is expected to receive and manage a portion of this growth.

2.2 Data Sources

The data summarized in this report comes from many different sources, including the Province of Ontario, the County of Simcoe, the Cities of Barrie and Orillia, area municipalities in Simcoe County, and key organizations in the study area. The information in the report is based on secondary source material and no primary data collection was undertaken. Information on the municipal development approvals inventories and inventories of vacant designated land supply was provided by staff from local municipalities.

2.3 Known Data Gaps

The information in this report is based on best available secondary source information. The known data gaps are as follows:

Intensification

The majority of municipalities in the study area have not undertaken an analysis to quantify the potential for intensification, which requires both an assessment of the physical potential for intensification and a market assessment of intensification. An estimate of potential for intensification, based on official plan policy permissions, has been prepared with the methodology documented in Section 6.0 of this report.



Intergovernmental Action Plan for Simcoe, Barrie and Orillia

Figure 2.1. Study Area Location

LEGEND

- Upper Tier Municipality¹
- IGAP Study Boundary²



Projection: UTM zone 17N NAD83
 Data Sources: 1. Ontario Ministry of Natural Resources
 2. Ontario Ministry of Municipal Affairs and Housing

Created by: PJK
 Checked by: RB



**Ainley Group
 Clara Consulting
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Last Modified January 31, 2006

Public Service Facilities

Information on cultural and/or recreation facilities was not provided by a few municipalities. Details on long-term care facilities were not available from the Ministry of Health and Long-Term Care.

Mapping for Collingwood

The mapping for Collingwood (land use designations) is subject to a licence agreement between the municipality and service provider, and was not readily available.

2.4 Data Collection Protocols

At the outset of this project a large amount of data was provided by the Ministry of Municipal Affairs and Housing (MMAH) and the County of Simcoe. Subsequent requests for additional information were made to MMAH, who directed the requests to the appropriate organizations, agencies or municipalities. Once initial contact had been made by MMAH, follow-up contact was made to obtain the information.

Information gathered and compiled for the Communities Report includes statistics, inventories, plans, maps, forecasts, and strategies, in both hard copy and electronic formats. Map data was principally provided by MMAH, Ministry of Natural Resources (MNR), and the County of Simcoe. In certain cases, specific mapping was provided by local municipalities.

3. POLICY CONTEXT FOR THE COMMUNITY ANALYSIS

3.1 Introduction

The discussion of a long-term sustainable urban structure for the study area must be done in the context of the existing policy framework and policy permissions reflected in approved planning documents.

Land use planning is a matter of provincial interest, responsibility of which is vested in MMAH, and delegated to regional and local governments. Recent legislative changes by the Province are intended to strengthen the role that municipalities have in their decisions related to growth. These legislative changes include, but may not be limited to:

- encouraging municipalities to build upon existing standards to address matters of importance in their community;
- ability to tailor some PPS goals to reflect local needs;
- application of policies, such as range of housing type and density, across an entire municipality rather than just in the context of a specific site;
- the use of enabling language in order to promote a policy direction while leaving some flexibility on the way to achieve the specific policy goal;
- preventing appeals to the Ontario Municipal Board of urban expansions that are opposed by elected municipal governments;
- increasing the time for planning authorities to decide on certain planning applications before the applicant can appeal to the OMB;
- identifying areas for planned growth; and
- enabling cross-jurisdictional planning for growth.

Existing and proposed provincial plans address the need for growth management in the Greater Golden Horseshoe and are intended to reinforce core components of the provincial policy framework.

This section of the Communities Report addresses the Provincial policy context for addressing growth management issues. The policy context is presented in existing Provincial legislation and growth management plans. The Federal initiative “A New Deal for Canadian Cities” is included in this section given its link to local municipalities and local planning.

3.2 The Provincial Context

The Provincial Government has a vision for Ontario communities – strong, liveable and sustainable. The land use planning system plays an important role in helping achieve this vision. The government is committed to taking a leadership role in supporting sustainable growth and good development. The policy framework encourages land use planning that looks beyond

municipal boundaries and addresses the three interrelated components of economy, environment and community.

The provincial planning context is evolving to be more strategic than it has been in the past. There is a greater recognition of the need to address good land use planning from a number of perspectives:

- Enabling legislation - *Planning Act*, as amended by the *Strong Communities (Planning Amendment) Act*, the *Places to Grow Act* and the *Greenbelt Act*;
- Broad policy direction - Provincial Policy Statement (2005);
- Implementation strategies – Greenbelt Plan, Oak Ridges Moraine Conservation Plan, Proposed Growth Plan for the Greater Golden Horseshoe.

The hierarchical context establishes a clear vision and then provides the tools needed to ensure the vision becomes reality. The effort on the part of the Provincial Government to prepare and introduce the provincial plans (Greenbelt Plan, Proposed Growth Plan, etc.) required to implement their broader policies demonstrates a commitment to action. The language used in all of the documents reflects a desire for clear direction on matters the government believes is essential to ensuring that communities grow in a well planned and coordinated way. The language is implementation oriented (preventing appeals, establish a network, shall not be re-designated).

Taken together, the policies clearly indicate that the Provincial Government is committed to providing strong planning leadership (shall be consistent with provincial policy; settlement areas shall be the focus of growth; population, household and employment forecasts will be used as the basis for planning and managing growth in the GGH).

The documents that combine to provide the provincial planning context deliver a message for IGAP. The message is that there is a need to integrate economic, environmental and community planning in order to identify where growth should occur, and where green space and significant natural and cultural heritage resources should be protected for future generations. The Provincial Government's policy-led approach is intended to ensure that there are choices about the future that can be properly evaluated and made – delivering the kind of communities that are desired in Simcoe, Barrie and Orillia.

3.2.1 The Planning Act

The *Planning Act as amended by the Strong Communities (Planning Amendment) Act* is the enabling legislation for land use planning in Ontario. The *Act*:

- makes provision for provincial policy-led land use planning system;
- promotes sustainable economic development in a healthy natural environment;

- integrates matters of provincial interest into provincial and municipal planning decisions by requiring all decision-makers to be consistent with the Provincial Policy Statement;
- provides for planning processes that are fair by making them open, accessible, timely and efficient;
- encourages co-operation and coordination among various interests; and,
- recognizes the decision-making authority and accountability of municipal councils in planning.

Provincial ministries, municipal councils, planners and other stakeholders use the *Act* when:

- preparing official plans and planning policies that will guide future development considering provincial interests, such as protecting and managing our natural resources;
- establishing a streamlined planning process which emphasizes local autonomy in decision-making;
- regulating and controlling land uses through zoning by-laws and minor variances;
- dividing land into separate lots for sale or development through a plan of subdivision or a land severance; and,
- ensuring the rights of local citizens to be notified about planning proposals, to give their views to their municipal council, and to appeal decisions to the Ontario Municipal Board (OMB).

IGAP recommendations must conform with *The Planning Act as amended*.

3.2.2 The Provincial Policy Statement (PPS)

The new Provincial Policy Statement (PPS) provides further direction on key Provincial interests related to land use planning. The PPS is issued under authority of the *Planning Act* and applies to all land use and planning matters as of March 1, 2005.

The complex interrelationships and inherent tensions among economic, environmental and social factors are recognized and drive the Province's policy-led planning system which is intended to be based on good planning principles. The underlying goal of PPS policy is to achieve an appropriate balance and support efforts to create strong, liveable and healthy communities.

The three main principles of the Provincial Policy Statement are:

1. Managing growth and promoting efficient, cost-effective land use patterns that not only optimize the use of land, resources and public investment in infrastructure; but that also

minimize the undesirable effects of development such as impacts on air, water and other resources;

2. Wise use and management of resources in order to meet long-term environmental and economic needs; and
3. Minimizing the potential for risk to public health and safety as well as cost, by directing development away from areas of natural and man-made hazards and hazards that can not be mitigated.

In order to ensure that the policies in the PPS are applied in all communities as key component of the planning process, the *Planning Act* requires that all decisions affecting land use planning matters “shall be consistent with” the PPS.

Given the PPS focus on achieving policy outcomes rather than prescribing how the process must be followed, the new wording requires decision-makers to demonstrate that their actions achieve the desired outcome for strong communities, a clean and healthy environment and a strong economy. The Province’s introduction of the “consistent with/conform to” legislative standard is considered to be a higher policy implementation standard. The change provides a clear statement that the principles embedded within the PPS must play a significant role in the land use planning process. This wording establishes the province as the planning policy leader.

Municipal official plans are one of the key tools for implementation of the PPS and for addressing complex interrelationships in order to achieve balance. The PPS requires official plans and related land use decisions to:

- focus growth within settlement areas and promote the vitality of those areas;
- limit residential development and other rural land uses in rural areas;
- protect prime agricultural areas for long-term use for agriculture by, among other things, discouraging lot creation in prime agricultural areas and specifically restricting new residential lot creation
- protect locally important agriculture and resources areas by directing non-related development to areas where it will not constrain these uses;
- make provision for sufficient land to accommodate an appropriate range and mix of land uses to meet projected needs for up to 20 years; with a focus on maximizing intensification and redevelopment opportunities;

- avoid development patterns that would prevent the efficient expansion of settlement areas; only allowing expansion at the time of a comprehensive review and only where intensification, redevelopment and designated growth areas can not sufficiently accommodate projected needs; planned or available infrastructure and public service facilities must also be suitable for the development;
- make provision for land use patterns that offer a mix of use and density; efficiently utilize available or planned infrastructure and public service facilities – avoiding unjustified and/or costly expansion; and minimize negative environmental impacts;
- maintain the ability to accommodate residential growth for a minimum of 10 years through intensification and redevelopment, and if necessary, areas that are designated and available for residential development; where new development is to occur, land must have servicing capacity for at least a 3 year supply of units; and,
- permit and facilitate the provision of all types of housing, including all forms of residential intensification and redevelopment in order to meet current and future needs.

The policies of the PPS provide minimum standards. Municipalities are encouraged to build on these minimum standards to address matters of local significance, unless doing so would conflict with any other policy of the PPS.

The Provincial Government's emphasis on achieving balance among economic, environmental and social factors will require the IGAP municipal partners to focus additional efforts on addressing intensification and in-fill, brownfields and the co-ordinated and cost-effective delivery of public infrastructure.

3.2.3 Niagara Escarpment Planning and Development Act (1973) and Niagara Escarpment Plan (1994)

The Niagara Escarpment, a world biosphere reserve, is in the western end of the study area. Development and site alternation on the escarpment are governed by policies in the Niagara Escarpment Plan. The objectives of this plan are to protect unique ecologic and historic areas; maintain and enhance the quality and character of natural streams and water supplies; provide adequate opportunities for outdoor recreation; maintain landscape character; ensure that all new development is compatible with the purpose of the *Act*; and provide public access to the Escarpment.

The plan includes seven land use designations with differing levels of protection corresponding to core, buffer and transition areas. The core areas are designated as Escarpment Natural Area. Buffer areas include Escarpment Protection Areas and Escarpment Rural Areas. Transition areas include Urban Area and Minor Urban Centres, Escarpment Recreation Areas and Mineral Resources Extraction Area.

The Escarpment Natural Areas have the most restrictive policies and the Urban Areas have the least restrictive. Limited buildings are permitted on Escarpment Natural Areas or Escarpment Protection Areas and only one new lot per original 40-hectare parcel is permitted in Escarpment Rural Area.

3.2.4 Oak Ridges Moraine Conservation Plan (ORMCP)

The Oak Ridges Moraine Conservation Plan (ORMCP) establishes a framework for protecting more than 190,000 hectares of land and water from the Trent River in the east to the Niagara Escarpment in the west. “Strategically located north of and parallel to Lake Ontario, the Moraine divides the watersheds draining south into western Lake Ontario for those draining north into Georgina Bay, Lake Simcoe and the Trent River system. The Moraine shapes the present and future form and structure of the Greater Toronto region and its ecological functions are critical to the region’s continuing health.”¹

The ORMCP presents a framework on how to protect the Moraine’s ecological and hydrological features and functions. Through the *Oak Ridges Moraine Conservation Act, 2001*, nine objectives were established. These objectives focus on protection, maintenance, improvement and restoration of functions key to ensuring the sustainability of this significant ecosystem.

The Conservation Plan divides the Moraine into four land use designations:

- Natural Core Areas (38% of the Moraine);
- Natural Linkage Areas (24% of the Moraine);
- Countryside Areas (30% of the Moraine); and,
- Settlement Areas (8% of the Moraine).

Local municipal official plans and zoning by-laws delineate the boundaries of each designation more precisely. The southwest corner of Simcoe County is affected by the ORMCP including the Natural Core, Natural Linkage and Countryside designations.

The policies presented in the Plan are very specific with respect to opportunities for development and redevelopment, as well as the use of land. Opportunities for development/redevelopment outside of Settlement Areas are limited. Stringent review and approval standards for opportunities that may be permitted ensure that natural heritage features, hydrologically sensitive feature, significant landforms and various ecological functions are protected.

¹ Oak Ridges Moraine Conservation Plan , 2002

Key land use policies include:

- No new aggregate resource extraction is permitted in Natural Core Areas. In Natural Linkage and Countryside Areas, new operations will have to meet stringent review and approval standards;
- New recreational developments such as golf courses, are only permitted in the Countryside Area, subject to stringent review and approval standards; and
- New transportation and utility corridors or facilities are only allowed in Natural Core and Natural Linkage Areas if they are shown to be necessary and there is no reasonable alternative.

While the ORMCP only affects a small portion of the study area the Plan delineates lands which are suitable for passive and active recreational uses and lands which can be supportive of economic development through eco-tourism. These areas will play a role in achieving a balanced growth management approach.

3.2.5 The Greenbelt Act (2005) and the Greenbelt Plan (2005)

The residents of Ontario need greenspace to help maintain the appearance of our communities, provide opportunities for recreation and leisure activities, promote healthy living, reduce the impacts of poor air quality and to generally contribute to our quality of life. Many people believe that greenspace is essential for achieving balance among economic, environmental and social sectors.

The Greenbelt Plan is intended to be the cornerstone in a strategy that defines where growth should be accommodated in the Greater Golden Horseshoe, and what should be protected for current and future generations. The Greenbelt Plan derives its authority from the *Greenbelt Act*, 2005. The Greenbelt Act authorizes the Lieutenant Governor in Council, by regulation, to designate an area of land as the Greenbelt Area. The Plan further authorizes the establishment of a Greenbelt Plan for all or part of the Greenbelt Area.

As a result of this legislation, the Greenbelt is a band of permanently protected land. While this area provides permanent agricultural and environmental protection, the Greenbelt also includes important natural resources and supports recreational and tourism uses/opportunities that are critical to a strong and evolving rural economy.

The Greenbelt Plan applies to the lands delineated in Ontario Regulation 59/05. The Plan builds on other elements of the Province's policy-led planning system, specifically the Provincial Policy Statement, Oak Ridges Moraine Conservation Plan and Niagara Escarpment Plan. In conjunction with the goals and objectives of these other policy documents, the Greenbelt Plan focuses on:

- Protection of Agriculture
 - Protection against loss and fragmentation of the agricultural land base;
 - Protection and support for specialty crop areas;
 - Offering flexibility for agriculture and agriculture-related uses; and
 - Offering increased certainty to the agriculture sector.

- Environmental Protection
 - Protection, maintenance and enhancement of natural heritage features, landforms and functions;
 - Protection and restoration of natural and open space linkages;
 - Protection, improvement or restoration of the quality and quantity of ground and surface water and the hydrological integrity of watersheds; and
 - Long-term guidance for the management of natural heritage and water resources – in the context of growth management, resource planning and public stewardship decision-making.

- Culture, Recreation and Tourism
 - Support for conservation and recreation/tourism promotion;
 - Provision of publicly accessible built and natural settings for recreation; and
 - Enable continued opportunities for sustainable tourism development.

- Rural Areas
 - Support for a strong rural economy by allowing for various functions/uses; and
 - Sustaining the character of the countryside and rural communities.

- Infrastructure and Natural Resources
 - Support infrastructure which achieves social and economic goals while minimizing environmental impacts;
 - Recognize the benefits of protecting renewable and non-renewable resources; and
 - Provision for the available and sustainable use of those resources critical to the region's needs.

The Greenbelt Plan recognizes that there are extensive areas of agricultural, natural and hydrologic significance located beyond the Greenbelt Plan Area. The intent is not to suggest that these lands are of lesser importance in the efforts to protect against loss and fragmentation in the process of identifying where and how future growth should be accommodated. Rather, the Plan states that those lands outside the Greenbelt Plan will continue to be subject to planning review. The Plan notes that “no preference for urban structure or the allocation of residential and employment growth beyond the Greenbelt should be inferred.”²

The Greenbelt Plan's reference to the need for protection against loss and fragmentation of key land resources beyond the actual Plan area is a significant matter for IGAP. The Greenbelt Plan

² Greenbelt Plan 2005

reinforces that agriculture, rural and natural heritage resources are principle land uses. Long-term growth planning must respect and adequately reflect these uses in sustainable growth plans. The Proposed Growth Plan for the Greater Golden Horseshoe does this by incorporating the enhancement and protection of significant natural features, as part of the Greenbelt, within the PGP's vision for 2031 and ensuring that, for lands within the Greenbelt Area, the relevant development/non-development policies in the Greenbelt, Niagara Escarpment and Oak Ridges Moraine Plans continue to apply.

3.2.6 Places to Grow Act (2005) and the Proposed Growth Plan for the Greater Golden Horseshoe (November 2005)

The *Places to Grow Act 2005* provides the legal framework for growth planning in Ontario. The Places to Grow Proposed Growth Plan for the Greater Golden Horseshoe (PGP) focuses on strategic decision making. The PGP builds on other planning and growth management initiatives, specifically the Greenbelt Plan and Provincial Policy Statement. It is part of the broader framework for implementing the vision for building stronger, prosperous communities by better managing growth.

The vision is one of compact settlement and development patterns that are capable of providing diverse opportunities to work, live and participate in community life. Under the plan's policies a large portion of the new growth will be accommodated in existing urban areas. Greenfield development will have to be planned at higher densities, and the conversion of rural/agricultural lands to urban uses will only be permitted under strict conditions.

The PGP identifies where growth will occur based on the establishment of urban growth centres and intensification corridors. Three general categories of urban growth centres are based on minimum gross density targets at year 2031:

- 400 residents and jobs combined per hectare for the five urban growth centres within the City of Toronto;
- 200 residents and jobs combined per hectare for urban growth centres of Brampton City Centre, Downtown Burlington, Downtown Cambridge, Downtown Hamilton, Downtown Milton, Markham City Centre, Mississauga City Centre, Midtown Oakville, Downtown Oshawa, Downtown Pickering, Richmond Hill/Langstaff Gateway, Vaughan Corporate Centre, Downtown Kitchener and Uptown Waterloo;
- 150 residents and jobs combined per hectare for the Downtown Barrie, Downtown Brantford, Downtown Guelph, Downtown Peterborough and Downtown St. Catharines urban growth centres.

Development in designated Greenfield areas will need to achieve minimum density targets not less than 50 residents and jobs combined per hectare. The need for and maximum amount of additional designated Greenfield area required in each upper tier – and single tier municipality to

meet growth forecasts will be determined, in part, by the Minister of Public Infrastructure Renewal.

In order to ensure a clear path for economic prosperity and reduce pressure on natural areas and farmland, the PGP focuses on the following principles:

- Build compact, vibrant and complete communities;
- Plan and manage growth to support a strong competitive economy;
- Protect, conserve, enhance and wisely use the valuable natural resources of land, air and water for current and future generations;
- Optimize the use of existing and new infrastructure to support growth in a compact, efficient form;
- Provide for different approaches to managing growth that recognize the diversity of communities in the GGH; and
- Promote collaboration among all sectors – government, private and non-profit sectors and citizens – to achieve this vision.

Key policy directions in the Plan include:

- Directing growth to built up areas where the capacity exists to best accommodate the expected population, household employment growth;
- Providing strict criteria for settlement area boundary expansion;
- Promoting density and land use mix that supports transit use;
- Preserving employment land for future opportunities;
- Linking urban growth centres and supporting a multi-modal transportation network for moving goods and people;
- Planning for the infrastructure to support growth;
- Ensuring sustainable water and waste water services; and
- Identifying and conserving a natural system and prime agricultural areas.

The PGP builds on the policy-led framework of the PPS, by providing more specific direction on where and how to grow in the GGH.

The distribution of population, households and employment for the GGH are calculated by upper tier municipality and grouped as Greater Toronto Area Hamilton and Halton (GTAH) and the Outer Ring. The projections are presented in Schedule 3 of the PGP. In 2031, the Outer Ring group only accounts for approximately 25% of the projected population; 27% of the projected households; and 23% of the projected employment. The projections for Simcoe County,

including Barrie and Orillia account for less than one-quarter of the Outer Ring projected growth.

- Downtown Barrie is identified as an “Urban Growth Centre”; and
- Population, household, and employment targets for 2031 have been established at 667,000 persons, 260,000 households, and 254,000 jobs, respectively.

While the PGP identifies the IGAP area for growth, the pace of growth is relatively modest compared to the GTAH.

The Province is clearly focused on strategic growth management decision-making. Opportunities for urban settlement area boundary expansion will be limited to those situations that can be justified through a comprehensive review that takes into account density target(s) for intensification. Settlement boundary expansion for a small cities or towns in the outer ring of the GGH will need to achieve or move towards a target of one full-time job per three residents in the immediate vicinity.

Under the *Places to Grow Act*, decisions under the *Planning Act* and *Condominium Act* will have to conform to an approved Growth Plan. The IGAP will need to address these matters.

3.3 The Federal Context

3.3.1 The New Deal for Cities and Communities

The Federal Government recognizes that Canada’s quality of life depends on strong and vibrant cities and communities. The New Deal is intended to promote new partnerships among various levels of government and start to deliver the stable, predictable, long-term funding needed to address four priority areas: environment, economy, social and culture.

The New Deal does not directly affect provincial land use planning policy. Federal programs such as the Municipal Rural Infrastructure Fund (MRIF), Environmental Sustainable Municipal Infrastructure (ESMI) and various existing infrastructure programs may help to address the need for funding in order to implement projects that stem from the Province’s focus on achieving policy outcomes: efficient development servicing, affordable housing through intensification and redevelopment. One example is the requirement of the Federal government for municipalities to prepare Integrated Community Sustainability Plans to access some of the funding available for municipal reinvestment.

4. EXISTING COMMUNITY CONTEXT IN THE STUDY AREA

4.1 Introduction

Documenting the baseline conditions in the study area is the starting point for measuring and assessing change. This section of the report considers existing conditions from physical development and policy planning perspectives. Specifically, the study area is described in terms of its existing population and dwelling units. The urban structure of the study area is described, in general terms, by its hierarchy of settlements. From a policy perspective, this section of the report provides brief summaries of the growth management studies and highlights pertinent policies from the Official Plans of the municipalities in the study area.

4.2 Population and Dwelling Unit Figures – Statistics Canada 2001 Census

Population and dwelling unit figures were obtained from Statistics Canada for the 2001 Census. The reports for the Simcoe County Census Agglomeration from Statistics Canada also include Census information for the following:

- The City of Barrie (separated city);
- Christian Island 30 (First Nations Reserve);
- Christian Island 30A (First Nations Reserve);
- Mnjikaning/Rama First Nation 32 (First Nations Reserve); and,
- The City of Orillia (separated city).

For the purposes of this ECA, the First Nations Reserves are not considered to be within the study area; however, the Cities of Barrie and Orillia are part of IGAP partnership. The population and dwelling counts from the First Nations Reserves are not expected to significantly skew the population and dwelling figures for the study area, and therefore the Census 2001 data is reported for the Simcoe County Census Agglomeration with no adjustments.

4.2.1 Study Area Population

The 2001 population of the study area is 377,050 persons. The following **Table 4.1** provides the population break down by study area municipality

Study Area Municipality	Type	Total Population
Adjala-Tosorontio	TP	10,082
Barrie	C	103,710
Bradford West Gwillimbury	T	22,228
Christian Island 30	R	515
Christian Island 30A	R	32
Clearview	TP	13,796
Collingwood	T	16,039
Essa	TP	16,808
Innisfil	T	28,666
Midland	T	16,214
Mnjikaning First Nation 32 (Rama First Nation 32)	R	597
New Tecumseth	T	26,141
Orillia	C	29,121
Oro-Medonte	TP	18,315
Penetanguishene	T	8,316
Ramara	TP	8,615
Severn	TP	11,135
Springwater	TP	16,104
Tay	TP	9,162
Tiny	TP	9,035
Wasaga Beach	T	12,419
Simcoe County		377,050

TP: Township T: Town C: City R: Reserve

4.2.2 Study Area Dwelling Units

The 2001 Census reported that the total number of private dwelling units was 137,135 units. The dwelling units from the 2001 Census, broken down by sub-area and dwelling type, are provided in the following table.

	Singles	Semi's	Towns	Apts.	Other	Total
Adjala-Tosorontio	3,085	100	5	85	15	3,290
Barrie	23,600	1,800	3,130	8,195	130	36,855
Bradford-West G.	5,255	480	165	1,200	30	7,130
Christian Island	165	5	5	-	-	175
Clearview	4,365	35	115	270	20	4,805
Collingwood	4,105	385	525	1,530	35	6,580
Essa	4,230	600	90	360	270	5,550
Innisfil	9,750	40	190	195	20	10,195
Midland	4,260	300	250	1,555	185	6,550
Mnjikaning/Rama	210	-	-	-	-	210
New Tecumseth	6,720	595	595	1,295	65	9,270
Orillia	7,035	385	780	3,250	165	11,615
Oro-Medonte	6,190	35	25	210	145	6,605
Penetanguishene	2,155	145	45	785	-	3,130
Ramara	3,095	20	250	35	15	3,415
Severn	3,895	35	15	175	65	4,185
Springwater	4,940	40	20	265	80	5,345
Tay	3,210	35	-	120	105	3,470
Tiny	3,440	5	-	80	5	3,530
Wasaga Beach	4,625	135	70	270	95	5,195
Study Area Total	104,345	5,175	6,270	19,875	1,470	137,135
Housing Mix	76%	4%	5%	14%	1%	100%

*Note: Numbers may not sum due to rounding.
Source: Statistics Canada, 2001 Census*

4.3 2004 and 2005 Population, Employment and Household Forecasts

Hemson Consulting Limited (Hemson) has prepared population, household, and employment forecasts that pertain to the study area. These forecasts have been frequently referenced and form an important foundation for many current growth management exercises being conducted in the GGH. This subsection summarizes the 2004 and 2005 forecasts.

4.3.1 Forecast Update for Simcoe County (2004)

In May 2004, Hemson prepared the *Population, Households, and Employment Forecasts Update (Final Report)* for the study area. The report describes the amount of growth the study area is currently planned for, the pressure that exists to accommodate growth beyond these commitments, and recommended that a comprehensive growth management exercise be undertaken to consider future growth options. The 'Current Trends' forecast for the study area is summarized in *Table 4.3*.

Table 4.3: Summary of Hemson Forecasts, May 2004

	Population Census 2001	Population Hemson 2026	Households Census 2001	Households Hemson 2026	Employment Census 2001	Employment Hemson 2026
Adjala-Tosorotio	10,082	15,300	3,300	5,600	1,304	2,000
New Tecumseth	26,141	38,600	9,278	15,100	17,254	26,400
Bradford-West G.	22,228	34,000	7,131	12,300	6,733	10,700
Innisfil	28,666	45,100	10,198	17,700	5,914	9,600
Essa	16,808	21,200	5,545	7,800	6,807	8,900
Clearview	13,796	18,400	4,804	7,100	3,768	5,200
Collingwood	16,039	22,800	6,576	10,300	10,841	15,900
Wasaga Beach	12,419	28,900	5,196	13,200	2,318	5,600
Springwater	16,104	22,600	5,351	8,400	4,389	6,400
Barrie	103,170	226,300	36,885	90,900	52,660	118,700
Oro-Medonte	18,315	26,700	6,607	10,700	4,197	6,300
Orillia	29,121	35,600	11,609	15,500	16,100	20,400
Ramara	8,615	12,600	3,419	5,500	1,908	2,900
Rama First Nation	597	600	212	200	2,987	3,100
Severn	11,135	16,100	4,185	6,700	3,448	5,200
Tay	9,162	10,900	3,472	4,500	1,422	1,800
Tiny	9,035	13,500	3,539	5,800	1,260	1,900
Midland	16,214	17,600	6,550	7,800	10,346	11,600
Penetanguishene	8,316	10,900	3,113	4,500	4,443	6,000
Christian Island	547	500	181	200	110	100
Simcoe Totals	377,050	618,200	137,141	249,800	158,210	268,700

Source: Hemson Consulting Limited

The pertinent information relates to the change between 2001 and the 2026 forecast. The change is summarized below on Table 4.4. According to the Hemson May 2004 report, the southern portion of the area and along the 400 corridor to Barrie (New Tecumseth, Bradford-West Gwillimbury, Innisfil and Barrie) is expected to experience the majority of forecasted growth – 67% of the population increase and 75% of the employment increase. The shoreline area in and around Wasaga Beach and Collingwood will also absorb a significant portion of the forecasted growth – about 10% of the population and 7.5% of the employment increase.

Municipality	Population Change 2001 -2026	Household Change 2001 -2026	Employment Change 2001 -2026
Adjala-Tosorotio	5,218	2,300	696
New Tecumseth	12,459	5,822	9,146
Bradford-West G.	11,772	5,169	3,967
Innisfil	16,434	7,502	3,686
Essa	4,392	2,255	2,093
Clearview	4,604	2,296	1,432
Collingwood	6,761	3,724	5,059
Wasaga Beach	16,481	8,004	3,282
Springwater	6,496	3,049	2,011
Barrie	123,130	54,015	66,040
Oro-Medonte	8,385	4,093	2,103
Orillia	6,479	3,891	4,300
Ramara	3,985	2,081	992
Rama First Nation	3	-12	113
Severn	4,965	2,515	1,752
Tay	1,738	1,028	378
Tiny	4,465	2,261	640
Midland	1,386	1,250	1,254
Penetanguishene	2,584	1,387	1,557
Christian Island	-47	19	-10
Simcoe Totals	241,150	112,659	110,490

4.3.2 GGH Forecast (2005)

In January 2005, Hemson prepared the *Growth Outlook for the Greater Golden Horseshoe* for the Greater Golden Horseshoe Forecast Committee³. The report outlines, at the regional/county level, the magnitude of growth pressures and challenges that municipalities in the GGH may face. It forecasts that "the pace of growth is more rapid than previously anticipated and may result in a doubling of population for some municipalities." Three scenarios are presented in the report. The following is a summary of the basis for these scenarios in the context of the PGP outer ring municipalities.

³ Composed of staff from the Ministries of Municipal Affairs, Public Infrastructure Renewal, and Transportation, as well as staff of upper tier and single tier municipalities.

Assumption	Defining the Scenarios in the Outer Ring		
	Current Trends	Compact	More Compact
Policies for Directing Growth	Reflects current policy trends	Reflects proposed policy directions in PGP discussion paper. More growth directed away from greenfields to Priority Urban Centres and Emerging Urban Centres and other intensification opportunities in existing urban areas	Compact scenario plus more growth directed from greenfields to Priority Urban Centres
Settlement and Growth Patterns	Continues current settlement and growth pattern based on recent market trends	Compact development. Proposed future economic corridors and growth focus to west and south.	More compact development. Stronger growth focus to west.
Infrastructure Support	Provided to meet growth needs.	Provided to meet growth needs.	Provided to meet growth needs.

Source: Hemson January 2005

Forecasts were prepared at the regional/county level only; no lower-tier share assignment of growth was made. Although the January 2005 Hemson Report does not specifically state that Barrie and Orillia have been included in the Simcoe Forecast, a note to this effect is included on Schedule 3 of the November 2005 Proposed Growth Plan for the Greater Golden Horseshoe and the numbers are very similar.

The three scenarios for the study area are shown on *Table 4.5*.

	Census Population 2001	Population Hemson 2031	Households Hemson 2031	Employment Hemson 2031
Current Trends	390,000	691,000	269,000	264,000
Compact	n/a	667,000	260,000	254,000
More Compact	n/a	636,000	248,000	242,000

Source: Hemson Consulting Limited

The GGH forecasts indicate that the Simcoe area will continue to experience significant growth pressure, due to the proximity to the GTA. As noted in the Hemson Report, “the amount of growth under any scenario is large, meaning the servicing issues (required to accommodate the

growth will need to be addressed during the forecast period.” The PGP uses the compact growth scenario.

4.4 Community Structure

The County is geographically very diverse. There are prominent physiological forms (Niagara Escarpment and Oak Ridges Moraine); a mix of till, sand and clay plains offering suitable locations for rural, agricultural and urban land uses; significant wetlands and areas of natural features; and extensive shoreline areas creating both natural areas and recreation, tourism and residential land uses. The diversity results in a combined rural and natural area setting coexisting with mid-size urban and smaller settlement areas.

Simcoe County is comprised of 16 Towns and Townships. While the Cities of Barrie and Orillia are geographically and economically linked to these constituent municipalities, Barrie and Orillia are separated cities and not subject to the governance and policy directives of the County.

The existing settlement structure is diverse:

- two major urban areas (Barrie and Orillia) accommodating a total population of approximately 134,000 people (2001);
- numerous settlement areas ranging from 15,000 people to 10-15 people;
- thousands of rural, cottage clusters and individual lots;
- agricultural settlement.

Figure 4.1 provides a broad overview of the settlement structure, using information available at the time of preparing this report. The list of designated settlement areas is provided below.



Intergovernmental Action Plan for Simcoe, Barrie and Orillia

Figure 4.1. Urban Settlement Structure

- LEGEND**
- IGAP Study Boundary²
 - Area Municipalities²
 - Provincial Highways¹
 - County Roads¹
 - Ponds and Lakes¹
 - Settlement Boundary³
 - Water Services Boundary³
 - Natural Areas¹
 - Built Up Urbanized Area (conceptual)⁴
 - Agricultural/Hamlet/Rural Areas³
 - Commercial (Employment/Industrial)³
 - Settlement With No Official Boundary³
 - Settlement Non-Decision³

Ontario
 Projection: UTM zone 17N NAD83
 Data Sources: 1. Ontario Ministry of Natural Resources
 2. Ontario Ministry of Municipal Affairs and Housing
 3. Simcoe County

4. Ministry of Public Infrastructure Renewal
 From A Current Assessment of Gross Land Supply in the Greater Golden Horseshoe, Issue 1, Winter 2005.
 The boundaries displayed in the map above are draft and illustrative only and are not to scale. They do not
 claim to accurately reflect land uses or planning boundaries. The Province does not assume any liability or
 responsibility with respect to the accuracy or completeness of the data illustrated in this map.

Created by: PJK
 Checked by: RB
**Ainley Group
 Clara Consulting
 Bourrie & Associates**

Last Modified March 14, 2006

<i>Adajala-Tosorontio</i>	<i>Essa</i>	Horseshoe Valley	<i>Springwater</i>
Colgan	Angus	Jarratt	Anten Mills
Everett	Baxter	Moonstone	Centre Vespra
Glencairn	Colwell	Oro Station	Elmvale
Hockley	Ivy	Price's Corners	Hillsdale
Lisle	Thornton	Rugby	Midhurst
Loretto	Utopia	Shanty Bay	Minesing
Rosemont		Sugar Bush	Orr Lake
Tioga	<i>Innisfil</i>	Warminster	Phelpston
	Alcona		Snow Valley
<i>Bradford-West G.</i>	Churchill	<i>Penetanguishene</i>	
Bond Head	Cookstown		<i>Tiny</i>
Bradford	Gilford	<i>Ramara</i>	Lafontaine
Newton Robinson	Lefroy	Atherley	Perkinsfield
	Stroud	Brechin	Toanche
<i>Clearview</i>		Cooper's Falls	Wyebridge
Avening	<i>New Tecumseth</i>	Gamebridge	Wyevale
Batteaux	Alliston	Longford Mills	
Brentwood	Beeton	Sebright	<i>Tay</i>
Creemore	Green Briar/Briar Hill	Udney	Port McNicoll
Devil's Glen	Penville	Uptergrove	Vasey
Dunedin	Thompsonville		Victoria Harbour
Duntroon	Tottenham	<i>Severn</i>	Waubauskene
Glen Huron*		Ardtree	Waverley
New Lowell	<i>Midland</i>	Bass Lake	
Nottawa		Coldwater	<i>Wasaga Beach</i>
Old Sunnidale	<i>Oro-Medonte</i>	Fesserton	
Singhampton*	Craighurst	Marchmont	
Stayner	East Oro	Port Severn	
Sunnidale Corners	Edgar	Severn Falls	
	Forest Home	Washago	
<i>Collingwood</i>	Guthrie	West Shore	
	Hawkestone		

The following areas are identified as a "Settlement Non-Decision" in the County's Official Plan:

- Within the Township of Clearview:
 - Olser Bluff (MMAH Dec/05 decision to delete has been appealed)
 - Collingwoodlands (MMAH Dec/05 decision to delete has been appealed)
- Within the Town of Innisfil:
 - Sandy Cove Acres

- Within the Township of Ramara:
 - Lagoon City

The density of development is generally greater in the south end and within urban areas. About one-third of the population (2001 – 134,000) lives in the Cities of Barrie and Orillia. The shores of Georgina Bay and Lake Simcoe also present higher residential densities, both for permanent and seasonal development. The shoreline attraction contributes to the population swell in the summer well beyond the permanent population statistic.

The diverse economic base includes:

- a wide variety of agriculture pursuits;
- resource-based industry, specifically aggregate and forestry activity;
- auto manufacturing;
- modern manufacturing and technical operations; and
- tourism, recreation and attraction oriented business.

A detailed description of the economic base is contained in Section 8 of this report.

Simcoe County assumed a policy-setting role for land use planning in 1992. The intent was to ensure that long-term and strategic issues related to, among other things, environment, economy, transportation, community, resources, were addressed.

The primary themes of the County Official Plan are:

- The need to protect, conserve and enhance;
- The wise management of resources;
- Ensuring that growth management results in a quality lifestyle as well as efficient and cost effective service delivery; and
- The need for coordinated planning and economic sustainability.

The shared planning responsibility provides the County with an opportunity to set the broad policy framework, and monitor/support implementation via policy in local planning documents. The overall policy structure directs most of the non-resource growth and development to settlements. In the context of the County Official Plan, settlements include both urban areas and rural settlement areas. The OP acknowledges that their varying types and extent of services, both hard and soft, make some settlements more suitable than others for accommodating long-term growth. The OP states that it is the local Official Plan that is intended to provide the basis for identifying the extent of appropriate growth. The County intends that this will be done through local growth management studies and detailed secondary plans.

In addition to policies directing where growth should occur, the County Official Plan establishes an environmental, cultural and natural heritage resource approach that focuses on achieving reduced land use conflict, quality of life benefits and wise use of land base goals. Key environmental and natural heritage features are mapped and form a foundation for OP schedules.

These schedules are intended to work in conjunction with policy in order to achieve the desired level of protection and enhancement. Local OP's are required to identify and protect the County Greenlands as well as local natural heritage systems. The County Official Plan calls for broad-based and watershed level analysis and future policy development in an effort to advance a functional assessment approach to the protection of natural functions such as groundwater recharge, stream/river base flow, wildlife movement and biotic diversity.

Overall, the County Official Plan strives to recognize the interrelationships between economy, environment and community and provide a vision for the future that balances all sides. It promotes development in settlements in an effort to conserve greater land for natural heritage protection and resource development and provide municipal services in an efficient manner. However, there appears to be an insufficient amount of higher-level direction necessary to achieve the desired result – particularly among so many constituent municipalities and significant growth pressure.

The County also has approval authority for subdivisions, condominiums, and local official plans. This authority has been delegated to some lower tier municipalities, specifically: Town of New Tecumseth, Township of Oro-Medonte, Town of Bradford West Gwillimbury, Township of Clearview, Town of Midland, Town of Penetanguishene, Township of Tay. The approval role is part of the process of ensuring that the urban structure meets the needs of the community and that issues are dealt with in a broad, strategic manner.

4.4.1 Municipal Hierarchy

The municipal hierarchy is a two-tier structure together with two separated municipalities:

- The primary urban area is the City of Barrie with a population of over 100,000 persons. This represents 28% of the study area's population;
- There is a group of municipalities with sizeable urban areas and a 20-30,000 population 2001 range. These municipalities include Bradford-West Gwillimbury, Innisfil, New Tecumseth, and Orillia. Together, these municipalities comprise 28% of the study area's population; and
- The smaller municipalities are more rural in nature and have smaller settlement areas. They account for the remaining 44% of the population.

4.4.2 Urban and Rural Population Mix

All of the above local municipalities comprise some mix of urban and rural population, with the exception of Barrie, Midland, Orillia, and Penetanguishene, which Statistics Canada reports as having entirely urban populations. Across the study area, the population is 71% urban and 29% rural, as noted in **Table 4.6**. Statistics Canada definitions for urban and rural are as follows:

“An urban area has a minimum population concentration of 1,000 persons and a population density of at least 400 persons per square kilometre, based on the current census population count. All territory outside urban areas is classified as rural. Taken together, urban and rural areas cover all of Canada.”

	Type	Total	Urban	%	Rural	%
Adjala-Tosorontio	TP	10,082	1,233	12.2	8,849	87.8
Barrie	C	103,710	103,710	100.0	0	0.0
Bradford West Gwillimbury	T	22,228	16,978	76.4	5,250	23.6
Christian Island 30	R	515	0	0.0	515	100.0
Christian Island 30A	R	32	0	0.0	32	100.0
Clearview	TP	13,796	5,202	37.7	8,594	62.3
Collingwood	T	16,039	15,605	97.3	434	2.7
Essa	TP	16,808	9,635	57.3	7,173	42.7
Innisfil	T	28,666	23,511	82.0	5,155	18.0
Midland	T	16,214	16,214	100.0	0	0.0
Mnjikaning First Nation 32 (Rama First Nation 32)	R	597	0	0.0	597	100.0
New Tecumseth	T	26,141	18,330	70.1	7,811	29.9
Orillia	C	29,121	29,121	100.0	0	0.0
Oro-Medonte	TP	18,315	0	0.0	18,315	100.0
Penetanguishene	T	8,316	8,316	100.0	0	0.0
Ramara	TP	8,615	0	0.0	8,615	100.0
Severn	TP	11,135	1,070	9.6	10,065	90.4
Springwater	TP	16,104	6,367	39.5	9,737	60.5
Tay	TP	9,162	5,294	57.8	3,868	42.2
Tiny	TP	9,035	0	0.0	9,035	100.0
Wasaga Beach	T	12,419	7,164	57.7	5,255	42.3
Simcoe County		377,050	267,750	71.0	109,300	29.0
<i>Source: 2001 Statistics Canada</i>						

4.4.3 Settlements and Servicing

Figure 4.1 shows the settlements designated in the County of Simcoe Official Plan. The cities of Barrie and Orillia are also shown. The County Official Plan defines settlements as including “traditional central places designated as Settlements by local municipalities.” Both urban areas and rural settlements are referred to as “settlements” in the context of the County’s Official Plan and the County’s overall growth management strategy.

It should be noted that at the time of approval of the County OP, being April 1998, the Province did not make a decision on several proposed settlement areas. As such, seven areas (Osler Bluff, Collingwoodlands, Old Sunnidale, Rich Hill, Tecumeth Pines, Sandy Cove Acres and Lagoon City) were identified as “Settlement Non-Decision.” These areas were subject to further discussion between the Ministry and the local municipality. On December 21, 2005, a decision was made to delete Osler Bluff, Collingwoodlands, Rich Hill and Tecumseth Pines from

being identified as settlement areas. The decision, as it relates to Osler Bluff and Collingwoodlands, is currently under appeal.

The County has numerous identifiable settlements in the study area which are:

- Fully serviced on municipal water and sanitary sewer services;
- Partially serviced on municipal water and private septic tanks; or
- Serviced by private water wells and private septic tanks.

Table 4.7 summarizes each municipality's approach to defining its settlement pattern and settlement boundary.

Table 4.7: Approaches to Defining Settlement Pattern and Boundary	
Municipality	Approach - Settlement Pattern and Settlement Boundary
City of Barrie	<ul style="list-style-type: none"> ▪ Guide, regulate and monitor growth in order to avoid compromising ability to provide appropriate services ▪ Strong urban centre ▪ Identify future urban areas; development on full services ▪ Encourage and accommodate the continued expansion and diversification of the City's economic base ▪ New residential development shall not jeopardize the expansion of the City's industrial, institutional and commercial sector
City of Orillia	<ul style="list-style-type: none"> ▪ Acknowledge the need for additional land ▪ Development of the lands to the west of Highway 11 and other identified areas for infilling and redevelopment ▪ Compact forms that make more efficient use of existing development or vacant lands
Town of Bradford West Gwillimbury	<ul style="list-style-type: none"> ▪ Properly define Bradford Urban Area ▪ New development confined as much as possible to the area close to the existing urban boundary ▪ Prohibit development of rural residential that is not farm related ▪ Clear and distinct boundaries between Bradford Urban Area and surrounding agricultural community ▪ Expansion of settlement areas of Bond Head and Newton Robinson will depend on communal water and sewers or alternative and a full Secondary Plan ▪ Boundaries identified on OP Schedules (existing development and area proposed for expansion)
Town of Collingwood	
Town of Innisfil	<ul style="list-style-type: none"> ▪ Growth primarily in urban areas ▪ Controlled and orderly growth on full services ▪ Rural lifestyle including the agricultural base shall be respected and preserved ▪ Severances in Agricultural Policy areas is generally prohibited; limited in rural areas

Table 4.7: Approaches to Defining Settlement Pattern and Boundary	
Municipality	Approach - Settlement Pattern and Settlement Boundary
	<ul style="list-style-type: none"> ▪ Provide for both permanent and seasonal residential in shoreline areas ▪ Stage service areas in Environmental Study Report – Stage I & II defined; Stage III = ultimate development area – it is expected that services will be extended south to Gilford and north to the middle of the 12th Concession ▪ Secondary Plans will provide details of future growth in specific areas
Town of Midland	<ul style="list-style-type: none"> ▪ New development in restricted rural area will be limited ▪ All development shall be on full municipal services ▪ New development along waterfront will ensure public access ▪ New employment areas will be developed ▪ Protect natural heritage features from inappropriate urbanization ▪ Growth in existing downtown and waterfront area ▪ Limited opportunities for new lot creation in shoreline residential area
Town of New Tecumseth	<ul style="list-style-type: none"> ▪ Rural and small town character while accommodating controlled growth ▪ 3 primary urban settlement areas (Alliston, Beeton, Tottenham) <ul style="list-style-type: none"> ○ Alliston – all new major industrial development ○ Beeton – residential complimented by commercial with few industrial uses ○ Tottenham – predominantly residential and secondary commercial and industrial ▪ 4 Hamlets; these help to direct development away from environmentally sensitive areas in the agriculture and rural areas ▪ provide growth opportunities for all urban areas; primarily focused on areas with services ▪ protect all farmland from conflicting land use and fragmentation ▪ move towards an assessment ratio of 60% residential and 40% commercial/industrial ▪ All new development requires municipal services ▪ Boundaries are established in the context of available servicing; future servicing will provide additional growth; when uncommitted reserve capacity is available, existing boundaries can be expanded based on Secondary Plan preparation
Town of Penetanguishene	<ul style="list-style-type: none"> ▪ Growth directed to urban serviced area ▪ Pattern of land use based on groups of complementary land uses – development based on these groups thereby separating activities that have conflicting requirements and functions ▪ All new development on the periphery of built up area to be on municipal services therefore must be reasonably close to existing services ▪ Priority for any existing servicing capacity will be infill and small developments in easily connected areas ▪ Ready to respond to all reasonable development requests within the framework of OP ▪ Sustainable development approach ▪ Proposals for major growth and development to be reviewed on a watershed management basis ▪ No development within 150 metres of centreline of harbour to protect aesthetics, accessibility and amenity of the area

Table 4.7: Approaches to Defining Settlement Pattern and Boundary	
Municipality	Approach - Settlement Pattern and Settlement Boundary
	<ul style="list-style-type: none"> ▪ Protect lands adjacent to urban service area from incompatible development so as to ensure that future expansion of urban service area will be cost effective and efficient ▪ Discourage scattered development in rural area ▪ Maintain rural buffer between Midland and Penetanguishene and Penetanguishene and hamlet of Toanche
Town of Springwater	<ul style="list-style-type: none"> ▪ Direct urban development to the existing urban settlement areas ▪ 2 major communities are preferred for growth (Elmvale and Midhurst) ▪ 7 rural residential settlement areas ▪ several smaller historic residential clusters ▪ adult lifestyle communities must be directed away from natural heritage features and agricultural lands ▪ encourage development that creates new commercial and industrial assessment and employment opportunities ▪ restrict new non-farm development within a reasonable distance of Barrie and Wasaga Beach in order to maintain a clear separation between rural and urban land uses and prevent urban sprawl adjacent to urban areas ▪ new development outside of settlement areas is not permitted in identified significant natural heritage areas, on prime agriculture and mineral aggregate resource lands ▪ development outside the urban and rural settlement areas requires studies ▪ industrial generally adjacent to urban settlement areas provided not incompatible ▪ Boundary identified on OP Schedules ▪ Phasing is based on servicing
Town of Wasaga Beach	<ul style="list-style-type: none"> ▪ Urban development area with full services will be the area for the majority of new development ▪ Rural area in the south easterly part of Town ▪ Rural landscape to be kept free of urban residential development; rural estate residential type subdivisions not permitted ▪ Designated areas for future industrial ▪ Restrict the creation of lots not serviced by municipal sewer and water ▪ Control residential development so that there is a balance between residential and industrial/commercial assessment ▪ Allow limited infill development outside municipal service area ▪ Orderly and satisfactory development achieved by preparing Secondary Plans prior to approving new urban development ▪ Boundary illustrates the location and amount of anticipated total future growth
Township of Adjala-Tosorontio	<ul style="list-style-type: none"> ▪ The majority of residential growth directed to the existing hamlets within the limits of established servicing constraints ▪ Agricultural designation preserved primarily for agricultural uses ▪ Rural areas are restricted to a mix of agricultural, recreation, low density residential and appropriate commercial, institutional and industrial ▪ If hamlet servicing constraints continue to slow hamlet development, it may be necessary to restrict the rate of rural growth

Table 4.7: Approaches to Defining Settlement Pattern and Boundary	
Municipality	Approach - Settlement Pattern and Settlement Boundary
	<ul style="list-style-type: none"> ▪ Limit estate residential development ▪ Hamlet boundaries established by Secondary Plans
Township of Clearview	<ul style="list-style-type: none"> ▪ Major forms of development directed toward the urban settlements best equipped with hard and soft services needed to accommodate intensive land use activity ▪ Agriculture will continue to be a dominant feature of the rural landscape; agricultural uses will be protected from incompatible development ▪ All future development will be serviced by full services; partial services only considered in areas that have already developed on partial services ▪ 3 primary settlement areas; although development in these areas is not automatic ▪ 10 secondary growth nodes ▪ 2 major recreation destinations ▪ may consider giving primary settlement status to Nottawa and Brentwood if major development applications are proposed and development is supported by a Secondary Plan ▪ Monitor growth rate and use OP review process to determine whether additional lands need to be provided ▪ Boundary shown on OP Schedules ▪ Future development boundary identifies lands deemed most logical for future growth; requires development of a Secondary Plan
Township of Essa	<ul style="list-style-type: none"> ▪ Agriculture continue to be a dominant feature of the rural landscape ▪ Minimize urbanization of agricultural area; consents still permitted ▪ Urban development directed primarily to Angus; some additional lower density development in Thornton and Baxter ▪ Four hamlets to allow development at a scale compatible with existing settlement ▪ Future residential development in Angus subject to servicing ▪ Boundary of settlement areas and hamlets identified on OP Schedules
Township of Oro-Medonte	<ul style="list-style-type: none"> ▪ Population concentration in a number of small rural settlement areas, along shoreline and some residential clusters in the central area of the Township ▪ Provide municipal services as efficiently as possible to settlement areas ▪ Hierarchy of settlement areas; new settlement areas are not contemplated and only considered on the basis of comprehensive review of vision ▪ Boundary expansion consideration only at OP review ▪ Boundary shown on OP Schedules
Township of Ramara	<ul style="list-style-type: none"> ▪ 10 recognized settlement areas <ul style="list-style-type: none"> ○ 2 types (Village = full services; Hamlet = partial services) ▪ establish efficient, cost effective and compact settlements ▪ ensure orderly and logical extension of existing development ▪ utilize existing infrastructure to increase capacity for growth ▪ utilize Secondary Plans to manage growth in settlement areas, including the establishment of development boundaries
Township of Severn	<ul style="list-style-type: none"> ▪ Community of smaller communities and rural areas ▪ Directs majority of new growth to settlement areas <ul style="list-style-type: none"> ○ 4 Main (Coldwater, Washago, West Shore, Port Severn)

Table 4.7: Approaches to Defining Settlement Pattern and Boundary	
Municipality	Approach - Settlement Pattern and Settlement Boundary
	<ul style="list-style-type: none"> ○ 5 Rural settlement ▪ Restrict development in Rural area ▪ Prohibit new residential development outside of settlement areas ▪ Boundary applies to developed and undeveloped lands in the settlement areas ▪ Boundary is shown on OP Schedules
Township of Tay	<ul style="list-style-type: none"> ▪ Remain predominantly rural in nature with two major (Victoria Harbour and Port McNicoll) and two minor (Waubaushe and Waverley) settlement areas ▪ Settlement strategy will maintain the integrity of the natural heritage system, agricultural and resource lands and preserve rural character ▪ Encourage cost effective land use patterns ▪ Strengthen role of settlement areas as focus of concentrated growth ▪ Strengthen role of rural areas for rural, resources and resource-based recreational activities by reducing amount of dispersed and scattered development ▪ Shoreline residential areas are generally not considered to be communities in the OP; allow conversion from seasonal to permanent residential ▪ Boundaries identified on OP Schedules ▪ Represent the ultimate extent and limits of the servicing areas for communities; this may be beyond the OP planning period ▪ Expansion of boundaries not considered until a Growth and Settlement and/or justification study is complete
Township of Tiny	<ul style="list-style-type: none"> ▪ Growth expected to occur primarily on lands that were already designated for development in the previous OP ▪ 80% of future population is likely to occur in the shoreline area that is now evolving into a permanent residential community ▪ 15% of new growth likely in the hamlets ▪ 5% of new growth in the rural area ▪ new residential development in the rural or agricultural area is not permitted ▪ expansion of the boundary of settlements is discouraged ▪ Boundary shown on OP Schedules

a. Urban Boundary / Servicing Boundary

For each settlement area shown on Figure 4.1, the respective urban boundary or servicing boundary is shown. An urban boundary is shown for settlements designated in the County Official Plan and for which an urban boundary is established by a local Official Plan. The servicing boundary is shown for settlements designated in the County Official Plan and for which an urban boundary is not established by a local Official Plan. This approach reflects the reality that in the absence of an established boundary, development can only proceed to the extent of the available servicing. A conceptual boundary is shown for those areas which are historically known as settlements but which are not designated as settlement areas in the County Official Plan.

The following areas are designated "Settlement" in the County's Official Plan and have a settlement area or urban boundary defined in the local Official Plan:

<i>Adajala-Tosorontio</i>	<i>Essa</i>	<i>Oro-Medonte</i>	<i>Tay</i>
Colgan	Angus	Craighurst	Port McNicoll
Everett	Baxter	Horseshoe Valley	Victoria Harbour
Hockley	Thornton	Shanty Bay	Waubauskene
Lisle	Colwell	Sugar Bush	
Loretto		Warminster	<i>Tiny</i>
Rosemont	<i>Innisfil</i>		Perkinsfield
	Alcona	<i>Penetanguishene</i>	Wyevale
<i>Bradford-West G.</i>	Churchill		Wyebridge
Bradford	Cookstown	<i>Severn</i>	Toanche
	Gilford	Coldwater	
<i>Clearview</i>	Lefroy		<i>Wasaga Beach</i>
Creemore	Stroud	<i>Springwater</i>	
New Lowell		Anten Mills	
Old Sunnidale	<i>New Tecumseth</i>	Centre Vespra	
Stayner	Alliston	Elmvale	
	Beeton	Hillsdale	
<i>Collingwood</i>	Tottenham	Midhurst	
		Minesing	
	<i>Midland</i>	Snow Valley	

The following areas are designated "Settlement" in the County's Official Plan, but do not have an urban boundary established by a local Official Plan:

<i>Adajala-Tosorontio</i>	Singhampton*	Jarratt	Bass Lake
Glencairn	Sunnidale Corners	Moonstone	Fesserton
Tioga		Oro Station	Marchmont
	<i>Essa</i>	Price's Corners	Port Severn
<i>Bradford-West G.</i>	Ivy	Rugby	Severn Falls
Bond Head	Utopia		Washago
Newton Robinson		<i>Ramara</i>	West Shore
	<i>New Tecumseth</i>	Atherley	<i>Springwater</i>
<i>Clearview</i>	Green Briar/Briar Hill	Brechin	Orr Lake
Avening	Thompsonville	Cooper's Falls	Phelpston
Batteaux	Penville	Gamebridge	
Brentwood		Longford Mills	<i>Tay</i>
Devil's Glen	<i>Oro-Medonte</i>	Sebright	Vasey
Dunedin	East Oro	Udney	Waverley
Duntroon	Edgar	Uptergrove	
Glen Huron*	Forest Home		<i>Tiny</i>
Nottawa	Guthrie	<i>Severn</i>	Lafontaine
	Hawkestone	Ardtrea	

As noted above, several areas were identified as "Settlement Non-Decision" in the Minister's approval of the County's Official Plan in April 1998. A December 2005 decision resolved the status of three of these areas (Old Sunnidale, Rich Hill and Tecumseth Pines). Sandy Cove Acres and Lagoon City remain as Settlement Non-Decision. Olser Bluff and Collingwoodlands will remain Settlement Non-Decision until the appeal of the Dec 2005 decision is resolved.

b. Built-Up Areas

The built-up areas depicted in **Figure 4.1** are based on data layers used in a *Current Assessment of Gross Land Supply in the Greater Golden Horseshoe, Issue I, Winter 2005*. The land supply analysis focused on broadly defined land uses within the GGH such as urbanized land, designated settlement area, non-urban land, and areas identified by various provincial plans and other protected greenspaces such as Federal Parks. The analysis did not net out particular land uses such as municipal parks, major institutions, streams or utility corridors.

The built-up area includes lands that have been developed and built-up with typical urban uses such as residential, industrial, commercial, institutional and utility lands. The report indicates that the County of Simcoe and the Cities of Barrie and Orillia contain approximately 19,600 hectares (48,600 acres) of built up area. This analysis is based on and is undertaken at the scale of the Greater Golden Horseshoe and is not intended for application at a specific local or neighbourhood scale.

According to the Proposed Growth Plan for the Greater Golden Horseshoe, the Ministry of Public Infrastructure Renewal will release a proposed built boundary for verification and delineation. Following consultation with individual upper- and single-tier municipalities, a final built boundary will be amended into the Final Growth Plan.

4.4.4 Existing Land Use

Existing land use information has been compiled for the Assimilative Capacity Study as an input to the ACS model. There are two datasets for existing land use prepared by each Conservation Authority participating in the ACS.

The dataset on existing land use as compiled by the Lake Simcoe Region Conservation Authority classifies land use into sixteen categories such as Active Aggregate, Golf Course, Industrial, Natural Heritage, Urban, etc. However, this dataset is not comprehensive to the entire study area.

The dataset on existing land use as compiled by the Nottawasaga Valley Conservation Authority contained eleven categories of land use such as Water, High Intensity Developed, Coniferous Woodland, Quarries, etc. This dataset is also not comprehensive to the entire study area, but covers a larger proportion of the study area than the LSRCA dataset.

Together, both datasets provide good coverage of the municipalities in the southern portion of the study area. However, they generally do not include Tiny, Midland, Penetanguishene, Tay,

Severn, Orillia and Ramara. A summary of the individual land use information from the datasets is provided on following table.

Land Use Classification from ACS based on NVCA and LSRCA Datasets Covering the Southern Portion of the Study Area			
NVCA Dataset		LSRCA Dataset	
Classification	Approx. Area (sq. km.)	Classification	Approx. Area (sq. km.)
Water	110	Active Aggregate	<10
Low Intensity Developed	10	Commercial	<10
High Intensity Developed	200	Estate Residential	<10
Hay / Pasture	350	Golf Course	<10
Row Crop	1,450	Inactive Aggregate	<10
Coniferous Woodland	150	Industrial	<10
Mixed Woodland	300	Institutional	<5
Deciduous Woodland	200	Intensive Agriculture	200
Woody Wetland	300	Landfill	<10
Quarries	20	Manicured Open Space	<10
Sod Farm / Golf Course	50	Natural Heritage Feature	1,000
		Non-intensive Agriculture	120
		Rail	<10
		Road	50
		Rural Development	20
		Urban	70
Subtotal	3,140	Subtotal	1,600

Note: Numbers may not sum due to rounding.

It should be noted that there is an overlap in the LSRCA and NVCA datasets provided and as a result, the *subtotal areas are not mutually exclusive and can not be summed together.*

4.5 Summary of Growth Management Studies

The summary of growth management studies is based on the reports provided by the municipal partners in the IGAP. Based on the number of studies received, it appears that only a few municipalities have undertaken growth management studies although many are experiencing growth pressures. Two of the studies were completed in the 1996/1997, prior to the Province's planning policy reform. As such, the growth assumptions and resulting growth management recommendations may not adequately reflect today's policy regime.

The following is a list of the growth management studies which have been prepared for municipalities in the study area and provided to the ECA:

- Adjala-Tosorontio (Township of), Growth Management Study, March 2005;

- Barrie (City of), Greater Barrie Area Local Government Review. The Challenge of Managing Growth, January 2002; and the Response by the Town of Innisfil – Managing Growth and Protecting Innisfil’s Communities: Response to a Report Prepared for the City of Barrie on Municipal Boundaries and Government Structure in South Simcoe County, November 2002
- Clearview (Township of), Official Plan Background Report, April 2001
- Collingwood (Town of) , OPA 46 Comprehensive OP Update, Population/Land Need Projections, October 2000
- Innisfil (Town of), Draft Town of Innisfil Official Plan Review: Issues and Options, November 2005;
- Midland (Town of), Growth Management Report, June 2000
- New Tecumseth (Town of), Growth Management Study, March 2002;
- Penetanguishene, (Town of), 1999 Update and Consolidation of the Official Plan and Zoning By-law, Phase I: Report on Issues for the Official Plan, August 1999
- Severn (Township of), Growth and Settlement Strategy Report, undated (assumed 1998/1999)
- Springwater (Township of), Growth Management Strategy, December 2004;
- Tay (Township of), Growth and Settlement Review: Municipal Growth Management Strategy, December 1996; and
- Wasaga Beach (Town of), Growth and Settlement Review, December 1997.

The above growth management studies are summarized in *Table 4.8 below*.

4.5.1 Key Observations from Growth Management Studies

Based on a review of the summary of growth management studies, it is clear that each study is different in terms of timelines, approaches, and findings. The following observations are made regarding the studies.

Base and Horizon Years

The base year and horizon years vary among all the growth management studies. The base year quoted include mid-1990’s (1996:Severn, Wasaga Beach, Tay; 1997:Clearview.), 1999 and 2001 (1999:Collingwood, Penetanguishene; 2001:New Tecumseth) and 2005 (Springwater, Innisfil, Adjala-Tosorontio); the horizon years generally reflect a corresponding 20 year planning period - varying from 2016, 2021, 2025, 2026 and 2031.

Method of Projection and Components of Projections

The methods of projections include the use of the population cohort survival method (Adjala-Tosorontio, Springwater), housing market forecasts (New Tecumseth), and blended approaches (Wasaga Beach). While all of the studies forecasted and considered implications for population and housing change, not all of the studies included consideration of employment (Innisfil, Springwater, Collingwood, Tay and Clearview).

The draft study for Innisfil includes low, reference, and high projection scenarios, whereas the other studies have considered growth in terms of specific targets.

Approach to Distribution and Target Areas

The distribution of growth varies from top-down, bottom-up, and blended approaches (Adjala-Tosorontio, Severn, Innisfil, Springwater, Clearview), bottom-up (Tay, New Tecumseth), and blended approaches. While it generally appears that the areas targeted for growth have municipal services, only one of the studies suggested a reduction of settlement area boundaries due to lack of suitable servicing. Severn and New Tecumseth suggested that some growth would be assigned to rural areas.

Reflection of Provincial Policy

The most recent studies generally acknowledge the Provincial policy goal of promoting efficient and cost effective land use patterns and minimizing the negative impacts of development on air, water and other resources. Penetanguishene specifically mentions the need to reinforce the importance of compact development within the Growth Management Study. For the others, the growth management recommendations may not achieve Provincial objectives with respect to intensification, in-filling and density targets.

The constituent municipalities have, for the most part, met the minimum standard for completing a growth management study. Several communities (Clearview, Springwater, Severn, New Tecumseth, Innisfil, Adjala-Tosorontio) have completed comprehensive studies and provided clear recommendations for urban growth allocations.

Table 4.8: Summary of Municipal Growth Management Studies										
Municipality	Date of Growth Management Study	Horizon period of study	Base data and method of projection	Anticipated change in population	Anticipated change in dwelling units	Anticipated change in employment	Approach to population distribution for new growth	Target areas for growth	Recommendations relating to urban growth, boundary changes, etc.	Recommendations relating to environmental preservation, separation of growth nodes, etc.
Adjala-Tosorontio	March 2005	2005-2025 (20 year horizon)	Uses 2004 Simcoe County projections, 2001 Census data, Cohort method	5,200 (2001-2026)	2,300 (2001-2026)	700 jobs	Top down, growth assigned to areas based on a ranking of settlement areas	Everett, Colgan, Loretto, Lisle, Hockley, Rosemont, Glencairn, Highway 89 corridor (employment only)	Residential <ul style="list-style-type: none"> Expand urban boundary of Everett, Loretto, and Lisle. Designate lands within existing urban boundary for Colgan for new growth. No urban boundary expansion in Hockley, Rosemont and Glencairn. Non Residential <ul style="list-style-type: none"> 105.3 hectares of employment land needed to satisfy growth (2001-2025) which can be met within the existing urban boundaries. Designate additional employment lands within urban areas 	<ul style="list-style-type: none"> Create Official Plan policies that will limit growth outside of settlement areas
Barrie	January 2002	2001-2021	City of Barrie Population, Household and Employment Forecasts 1996-2021, Hemson 1997 Simcoe County Forecasts Results – Update, Hemson 1997	72,300 (2001-2021) reflects an unconstrained population and expanded boundary	28,560 (2001-2021)	45,100 (2001-2021)			Residential <ul style="list-style-type: none"> Need for an additional 200 - 250 ha <ul style="list-style-type: none"> 21,745 single and semi units 4,285 row units 2,530 apt units Non-residential <ol style="list-style-type: none"> 400 ha additional employment lands 	Development in Barrie requires on 25% of the land that would be needed to accommodate growth in areas without urban services because densities for development on full services are higher. This results in less use of agricultural resources and a significant reduction in urban sprawl
***** Innisfil Response	***** November 2002	*****	*****	***** the concern is not directly related to the forecasted population but rather with the development density and related projection of land required to accommodate population growth	***** the concern is not directly related to the forecasted households but rather with the development density and related projection of land required to accommodate household growth	***** there is concern that the activity rate has been overstated and that this affects the translation to land requirements	***** Concern that Barrie has ignored The principles of the Barrie-Innisfil Annexation Agreement. The previous annexations were intended to provide Barrie with enough land to reach 2011 population. Barrie is not reaching its own	***** Barrie is not meeting its own density or unit mix targets Barrie should examine the potential for promoting a more compact urban form through infill, intensification of built up areas, brownfields redevelopment and densification	Combining the additional land need for both residential and employment uses, a minimum of 750 ha of land is required to meet growth needs to 2021 ***** the need for additional land is vastly overstated 3. there is a 17-20 year supply of residential land available for future growth 4. analysis suggest that there is a 78-94 year supply of employment lands 5. Some of the land designated	***** New development in Innisfil is occurring on full urban services Density in Innisfil is comparable to Barrie The proposition

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							density targets and if it did, there would be ample land within its borders	of new urban communities Some of the land designated and sitting vacant for industrial use may be suited for other land uses which could further extend the timeline for accommodation of growth within existing boundaries	and sitting vacant for industrial use may be suited for other land uses 6. Development in other parts of the County, including Innisfil, is based on sound planning. 7. Growth is planned for several serviced communities so Barrie is not the only location in the County to accommodate growth	that expanding urban boundaries would mean better growth management is contrary to current Provincial policy (ie: Smart Growth). Any such extension would be a perpetuation of the practices Smart Growth is trying to reform ▪ There are policies in place for Innisfil to prevent a pattern of fringe development
Clearview	April 2001	1997-2021	Development Charges Study (noted as recent) supplemented by County Official Plan projections	6,219 (1997-2021)	2,658 (1997-2021)		Top down Growth assigned to settlement areas: ▪ 86.5% primary ▪ 9% secondary ▪ 4.5% rural	Creemore New Lowell Stayner	Potential for growth in Osler Bluff recreational resort area should be addressed in the context of a Secondary Plan	Devil's Glen recreational resort area growth potential will continue to be subject to the policies of the Niagara Escarpment Plan Area
Collingwood	October 2000	1999-2021	Update of the projection methodology utilized for earlier municipal and County forecasting	10,083 (1999-2021) permanent and recreation	3,729 (1999-2021)				Residential ▪ 200 ha additional land ○ 2,081 single detached units ○ 1,249 multiple units ○ 370 apartments Non-Residential ▪ 63.5 ha additional industrial land by 2021	
Innisfil	Draft, November 2005	2005-2026	Uses 2004 Simcoe County projections as base and modifies based on spillover from GTA, increased immigration and spillover	Three projections provided. Low: 78,350 people	Low: 28,484 units Reference: 34,630 units High:	Not stated	Top down, growth to be assigned to various areas (to be determined in latter stage of	To be determined	To be determined	▪ Growth Plan will determine a separate policy layer for a Natural Heritage

Table 4.8: Summary of Municipal Growth Management Studies										
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			from Barrie, 2001 Census data	Reference: 93,000 people High: 118,500 people	44,100 units		Growth Plan)			<ul style="list-style-type: none"> System Growth Plan will also consider agriculture, transportation and transit and servicing constraints
Midland	June 2002	1996-2016	Historical Population Simcoe County Projections Building Permit data 1980-1999 Committee of Adjustment Statistics, 1980-1999 Potential Development Summary Inventory of Vacant Industrial Land	3,315-4,985 (1996-2016)	1,600 (1996-2016)	693 jobs (1996-2016)			No additional land needed to accommodate forecasted growth (residential and employment)	<ul style="list-style-type: none">
New Tecumseth	March 2002	2001-2031 (population projections for 30 year period, housing and employment over a 20 year period, 2001-2021)	1996 Census data, Housing Market Forecast	21,000 people (2001-2026)	7,900 units (2001-2026) 9,400 (2001-2031)	9,200 jobs (2001-2021)	Bottom up, market based approach	Alliston, Beeton, Tottenham, Briar Hill and a portion to rural areas	Residential <ul style="list-style-type: none"> No additional lands needed for Alliston, Tottenham and Briar Hill. Expansion required for Beeton Non-Residential <ul style="list-style-type: none"> 170 hectares townwide ((2001-2021) 	<i>Study relies upon existing goals and objectives of the 1995 Official Plan.</i>
Penetanguishene	August 1999	1996-2021	Development Charges Study (no date indicated), Hemson Consulting	3,066 1999-2021	821 199-2008	1,313 1999-2018		Inventory of lots sufficient to meet longer term needs	Residential <ul style="list-style-type: none"> Reinforce the importance of compact development Non-Residential <ul style="list-style-type: none"> Complete a Commercial Planning Study to determine if and where commercial land is needed within the urban envelope 	Rural areas of the Town are suggested to remain as buffers between settlements therefore recommend development in the rural area be restricted
Severn	Undated (assume 1998/1999)	1996-2021	1994 CN Watson Development Charges Study 1995 Hemson Growth Outlook for Simcoe County 1995 Province of Ontario Projection Methodology Guidelines	6,500 (1996-2021)	2,830 (1996-2021)	840 (1996-2021)	Top down Proposed new settlement classification system <ul style="list-style-type: none"> Major Minor 	55% Urban Settlements <ul style="list-style-type: none"> Coldwater West Shore 45% Rural <ul style="list-style-type: none"> 23% conversions of 	Residential <ul style="list-style-type: none"> steps must be taken to service settlement areas in order to break away from rural development trends severely limit rural severances 	

Table 4.8: Summary of Municipal Growth Management Studies										
Municipality	Date of Growth Management Study	Horizon period of study	Base data and method of projection	Anticipated change in population	Anticipated change in dwelling units	Anticipated change in employment	Approach to population distribution for new growth	Target areas for growth	Recommendations relating to urban growth, boundary changes, etc.	Recommendations relating to environmental preservation, separation of growth nodes, etc.
							<ul style="list-style-type: none"> Country 	seasonal dwellings <ul style="list-style-type: none"> 22% vacant lot inventory 	<ul style="list-style-type: none"> strict policies for new country subdivisions Non-Residential <ul style="list-style-type: none"> no new industrial land required 	
Springwater	December 2004	2005-2025	Uses 2004 Simcoe County projections, 2001 Census data, Cohort method	6,500 people (2001-2026)	3050 units (2001-2026)	Not stated	Top down, growth assigned to settlement areas	Midhurst and Hillsdale receive greatest portion of growth. Boundaries of Orr Lake, Anten Mills and Phelpston should be reduced.	Residential <ul style="list-style-type: none"> Additional lands needed for 1350 new residential units (90-135 ha) Non-Residential <ul style="list-style-type: none"> The Township has sufficient lands designated to meet its forecasted growth for employment lands 	<ul style="list-style-type: none"> Maintain a "Greenbelt" around the City of Barrie and Town of Wasaga Beach. Revised settlement hierarchy: <ul style="list-style-type: none"> Major Settlements (Midhurst, Elmvale, Hillsdale) Recreational District (Snow Valley) Minor Settlements (Anten Mills, Minesing and Phelpston) No Growth (Orr Lake)
Tay	December 1996	1996-2016	1996 Census data	13,520 people (1996-2016)	670 units (1996-2016)	n/a	Bottom-up	Victoria Harbour and Port McNicoll	Residential <ul style="list-style-type: none"> No new settlement areas required Victoria Harbour and Port McNicholl, as fully serviced settlement, are the targeted growth areas and require no urban boundary change Waubauskene, Waverly, shoreline and rural settlement areas are not expected to receive major growth 	<ul style="list-style-type: none"> Appropriate studies of drainage, hydrogeology, aggregate and agricultural impact recommended for new settlements (e.g. retirement communities)
Wasaga Beach	December 1997	1996-2016	1996 Census data, population projections based on a "blended" approach,	7,200 people (1996-2016)	3,500 units (1996-2016)	1,600 jobs (1996-2016)	N/A	N/A - One fully serviced urban area constitutes	It is anticipated that future settlement areas of the Town will be extensions or additions to the	Recommended that future growth consider Natural

Table 4.8: Summary of Municipal Growth Management Studies										
Municipality	Date of Growth Management Study	Horizon period of study	Base data and method of projection	Anticipated change in population	Anticipated change in dwelling units	Anticipated change in employment	Approach to population distribution for new growth	Target areas for growth	Recommendations relating to urban growth, boundary changes, etc.	Recommendations relating to environmental preservation, separation of growth nodes, etc.
			utilizing five different prediction methodologies					the municipality.	present built up area.	Heritage System.

4.6 Approval Status of Official Plans

Each municipality in the study area has an approved Official Plan. Some of the municipalities in the study area have newer Official Plans which are more reflective of Provincial policy directions. However, many of the Official Plans have been adopted or at least prepared prior to the more recent policy reform. For those municipalities, the current policy directive is not adequately reflected.

A list of the Official Plan and their status is provided below. It should be noted that there are several Official Plan with outstanding sections or matters before the Ontario Municipal Board, which is too extensive to list in detail here. General comments regarding outstanding matters have been provided.

Municipality	OP Approval Date	Office Consolidation Date	Outstanding Matters
Simcoe County	Adopted October 28, 1997 Approved April 1, 1998	March 2005	
City of Barrie	Adopted July 25, 1994; approved 1997; Draft New Official Plan, April 2005		
City of Orillia	Adopted November 8, 1999, and amended to September 2004		
Town of Bradford West Gwillimbury	Adopted February 15, 2000; various OMB approval dates 2001 & 2002; OPA #7 approved April 7, 2004	October 2002	
Town of Collingwood	Adopted January 19, 2004	May 2004	
Town of Innisfil	Adopted April 28, 1993; partial approval August 1995 with additional approvals 1996-1999	2002	Numerous referrals, modifications and deferrals, particularly with respect to population, growth and urban structure
Town of Midland	Adopted October 2002; approved May 2003	October 2004	
Town of New	Adopted October	November 2003	Multiple OPA's related

Municipality	OP Approval Date	Office Consolidation Date	Outstanding Matters
Tecumseth	1994; approved Oct & Nov 1995		to growth and development; Secondary Plans not all approved
Town of Penetanguishene	Approved date not available in document; 1970's is possible	November 2003	
Town of Springwater	Adopted October 1997; approved January 1998	June 2003	
Town of Wasaga Beach	September 9, 2003	January 2005	
Township of Adjala-Tosorontio	Adopted November 2, 1998; approved October 1999	November 2000	
Township of Clearview	Adopted September 2001; approved January 2002		
Township of Essa	Adopted April 19, 2000; approved July 2001 ⁴		Growth history has been constrained by lack of municipal services in Angus and Thornton
Township of Oro-Medonte	Used 5 existing OP's post 1994 amalgamation; new OP approved August 1997	April 13, 2005	
Township of Ramara	Adopted July 31, 2003 with appeals	OMB modifications consolidated to January 2004	certain sections still under appeal
Township of Severn	Adopted in 2005		
Township of Tay	Adopted July 8, 1998; approved February 1999	Is a consolidation of former Twp OP, as amended by OPA #21	
Township of Tiny	Adopted September 2000; approved April 2001 & February 2003	January 2005	

⁴ This is the date on the cover; no approval date is noted.

Figure 4.2 illustrates the planned land use as shown in the local municipal Official Plans (as compiled by the County of Simcoe).

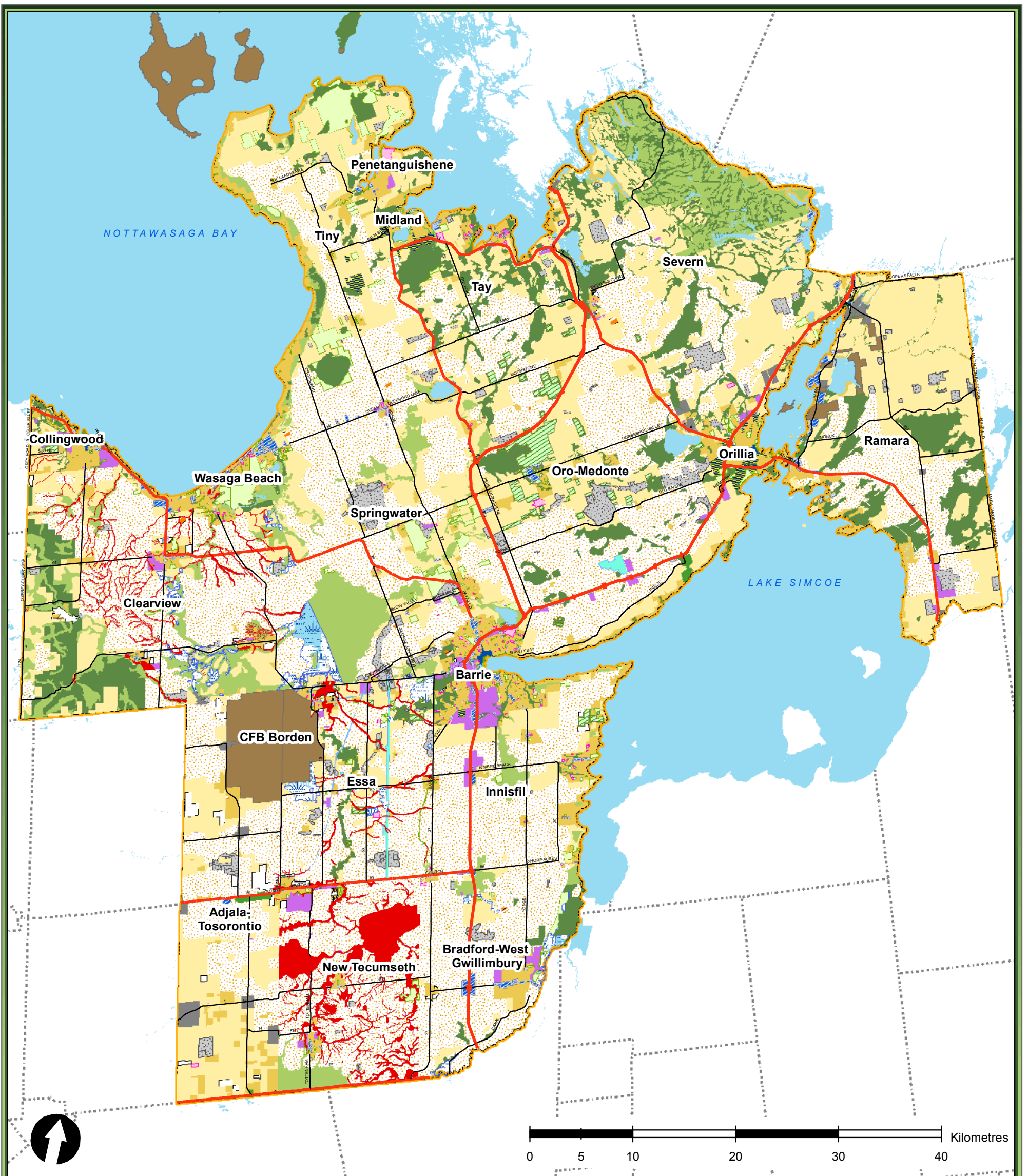
4.7 Goals, Objectives, and/or Strategic Principles of Municipal Official Plans

The goals, objectives, and/or strategic principles for a community are the planning foundation upon which the land use policies in municipal official plans are based. These goals, objectives, and/or strategic principles have a broad scope and address matters such as the environment, community, and economy. For the purposes of this report, a review of the goals, objectives and/or strategic principles of the municipal official plans referenced in subsection 4.6 has been undertaken. This summary is provided in *Table 4.6*.

It is recognized that the official plans in the study area have been written using different approaches. Generally, all of the plans included an introductory chapter or section in the document which addresses broad municipal goals, objectives, and/or strategic principles. Some plans also had goals, objectives, and/or strategic principles integrated in the land use provisions of the document.

It is noted that official plans did not organize their goals, objectives, and/or strategic principle under the three elements of the Communities component of the ECA, namely Development, Public Service Facilities, and Economic Base. To aid in the analysis required for the ECA, the summary presented in *Table 4.6* attempts to translate the theme of a goal and identify the appropriate ECA component. For example, if a goal suggested enhancing opportunities for prosperity in the agricultural sector, then this goal is listed under economic development.

In addition to these broad principles, the summary presented in *Table 4.9* identifies each local municipality's growth management goals and approach. Read together, Table 4.9 and 4.10 provide a snapshot of the local policy approach to growth management issues.



Intergovernmental Action Plan for Simcoe, Barrie and Orillia
Figure 4.2. Planned Land Use - Lower Tier Municipalities



Projection: UTM zone 17N NAD83
 Data Source: 1. Ontario Ministry of Natural Resources
 2. Ontario Ministry of Municipal Affairs and Housing
 7. Simcoe County and/or Barrie, Orillia & Lower Tier Municipalities

Compiled by: County of Simcoe
 Created by: HGS
 Checked by: AMJ

Table 4.9: Summary of Goals, Objectives and/or Strategic Principles from Municipal Official Plans

Municipality	Goals, Objectives and/or Strategic Principles		
	Development	Public Service Facilities	Economic Development
Simcoe County	<ul style="list-style-type: none"> ▪ Growth management to achieve lifestyle quality, and efficient and cost-effective municipal servicing, development and land use ▪ Co-ordinated land use planning among the County's local municipalities and with neighbouring jurisdictions 	<ul style="list-style-type: none"> ▪ <i>No specific mention of public service facilities in plan's goals</i> 	<ul style="list-style-type: none"> ▪ Community economic development which promotes economic sustainability in Simcoe County communities, providing employment and business opportunities
Adjala-Tosorontio	<ul style="list-style-type: none"> ▪ Recognize hamlet, rural and agricultural residents ▪ Population growth should be limited ▪ Single detached residential will dominate, supplemented by accessory units for seniors and young families 	<ul style="list-style-type: none"> ▪ A variety of community services should be available ▪ Joint use agreements may be used 	<ul style="list-style-type: none"> ▪ Strong agricultural sector will be maintained ▪ Non-intrusive and complementary businesses are encouraged
Barrie	<ul style="list-style-type: none"> ▪ Provide a range of housing types, sizes, and prices ▪ Encourage intensification and transit-supportive development 	<ul style="list-style-type: none"> ▪ Encourage sporting, trade and convention facilities and venues for arts and entertainment activities 	<ul style="list-style-type: none"> ▪ Expansion and diversification of economic base ▪ Simcoe's principal employment centre ▪ Encourage knowledge industries (health, telecom, etc.)
Bradford-West Gwillimbury	<ul style="list-style-type: none"> ▪ Clear/distinct boundaries between Bradford urban area and surrounding agricultural community ▪ Expanding urban base to become a strong urban centre ▪ Bradford Urban Area will continue to develop at relatively low density (higher density targeted for commercial core) ▪ Provide a variety of housing form; broader mix of housing 	<ul style="list-style-type: none"> ▪ Ensure a full range of community facilities to serve expanding residential community 	<ul style="list-style-type: none"> ▪ Support the strong agricultural sector ▪ Expand and diversify the labour force ▪ Improve supply of home-based jobs
Clearview	<ul style="list-style-type: none"> ▪ Encourage an efficient urban form with high quality, varied and affordable housing supply ▪ Direct major development to serviced settlement areas ▪ Ensure sufficient supply of land 	<ul style="list-style-type: none"> ▪ Provide sufficient park, recreation and sport facilities ▪ Ensure timely expansion of recreational facilities ▪ Establish new trails and co-ordinate regional trail improvements 	<ul style="list-style-type: none"> ▪ Protect viability of agricultural and livestock operations ▪ Encourage a balanced commercial/industrial assessment ▪ Encourage a variety of enterprises and suitable lands ▪ Maximize the development opportunities associated with the Collingwood Airport ▪ Maximize recreation/tourism potential
Collingwood	<ul style="list-style-type: none"> ▪ Growth and change are consistently monitored, evaluated and understood ▪ De-emphasize a strong dependence on vehicles and move towards being pedestrian-friendly and walkable 	<ul style="list-style-type: none"> ▪ The waterfront is our single, most-important asset 	<ul style="list-style-type: none"> ▪ Function as the service and economic hub for the greater area ▪ All initiatives/decisions are for residents and visitors alike
Essa	<ul style="list-style-type: none"> ▪ Direct major growth to settlement areas, and identify boundaries of settlement areas/hamlets ▪ Ensure a reasonable supply of land for housing, adequate supply of housing, and diversity of housing types 	<ul style="list-style-type: none"> ▪ Upgrade and improve municipal services to meet the needs of the Township 	<ul style="list-style-type: none"> ▪ Expect that CFB Borden will provide the greatest percentage of employment opportunities in the area ▪ Provision made in Angus for commercial and industrial development
Innisfil	<ul style="list-style-type: none"> ▪ To permit a full range of housing forms/densities, and limited estate residential development ▪ Majority of development directed to fully-serviced areas 	<ul style="list-style-type: none"> ▪ Provide a broad range of recreation and leisure opportunities ▪ Develop a continuous system of open space, preserve/improve parks, and encourage trails ▪ Develop recreational facilities in consultation with residents 	<ul style="list-style-type: none"> ▪ Maintain existing commercial facilities that attract tourists and visitors ▪ Encourage industrial/commercial development to balance the tax base, preferably which are light/dry industries ▪ Encourage agriculture-related industries
Midland	<ul style="list-style-type: none"> ▪ Ensure the provision of an adequate supply and variety of housing, including affordable housing ▪ Maintain and improve housing stock ▪ Promote assisted housing for moderate/low-income households 	<ul style="list-style-type: none"> ▪ Enhancing the waterfront public trail (Trans-Canada Trail), park system and Town down 	<ul style="list-style-type: none"> ▪ Attract new industries and support existing businesses ▪ Protect the downtown ▪ Provide strategically-located highway commercial ▪ Stimulate tourist industry through attractions
New Tecumseth	<ul style="list-style-type: none"> ▪ Accommodate controlled growth 	<ul style="list-style-type: none"> ▪ Promote a diversity of cultural activities, and active and 	<ul style="list-style-type: none"> ▪ Develop a healthy, diversified economy with local

Table 4.9: Summary of Goals, Objectives and/or Strategic Principles from Municipal Official Plans			
Municipality	Goals, Objectives and/or Strategic Principles		
	Development	Public Service Facilities	Economic Development
	<ul style="list-style-type: none"> Alliston, Beeton and Tottenham are primary urban areas 	<ul style="list-style-type: none"> passive recreational opportunities Recognize the social, housing, educational and health needs of residents and provide a network of services 	<ul style="list-style-type: none"> employment, balanced tax base, healthy downtowns and strong commercial development Transportation supportive of efficient business traffic
Orillia	<ul style="list-style-type: none"> Ensure that future growth occurs in a responsible manner Encourage compact forms of development Encourage redevelopment and in-filling in the downtown and foster a pedestrian environment 	<ul style="list-style-type: none"> Land must be developed for ...institutional and recreational facilities Public open spaces are a key element 	<ul style="list-style-type: none"> Encourage sustainable economic prosperity and diversified economic base Maintain and enhance serviced lands for economic development Promote tourist facilities at the waterfront and downtown
Oro-Medonte	<ul style="list-style-type: none"> Consolidate residential development in existing settlement areas; new rural residential subdivisions are not permitted Direct new highway commercial/industrial to Highway 11 Provide clear spatial delineation between the Barrie and Orillia urban areas 	<ul style="list-style-type: none"> Encourage expansion and diversification of existing recreational uses 	<ul style="list-style-type: none"> Encourage development which increases economic activity Strengthen the role of the Lake Simcoe Regional Airport Encourage home-based business
Penetanguishene	<ul style="list-style-type: none"> <i>Brief section on goals references sustainable development and management of air, land, water, and biological resources, as well as recognition of economic needs</i> 	<ul style="list-style-type: none"> <i>Brief section on goals references sustainable development and management of air, land, water, and biological resources, as well as recognition of economic needs</i> 	<ul style="list-style-type: none"> <i>Brief section on goals references sustainable development and management of air, land, water, and biological resources, as well as recognition of economic needs</i>
Ramara	<ul style="list-style-type: none"> Establish efficient, cost effective and compact settlements Provide for orderly/logical extensions of settlements Utilize secondary plans to manage growth Maintain 10 year supply of designated land for residential Allow for intensification/in-filling 	<ul style="list-style-type: none"> Accommodate community-based social, education, health, cultural, religious and recreational facilities Provide active/passive recreation opportunities 	<ul style="list-style-type: none"> Provide opportunities for business to locate in settlements Promote casino-related commercial along Rama Road Encourage new tourism facilities as destinations Encourage new/expanding industries Support home-based, farm-based, and traditional agriculture
Severn	<ul style="list-style-type: none"> Direct development to fully-serviced areas Allow only residential infilling in the rural area and prohibit new residential development outside settlement areas Ensure that development is appropriately phased 	<ul style="list-style-type: none"> Encourage passive, low-intensity recreation, e.g. four-season trails Ensure settlement areas contain community facilities Protect natural attributes for ensure recreational (and tourism) uses can thrive 	<ul style="list-style-type: none"> Maintain and enhance employment areas Encourage retention/expansion of existing businesses Ensure that farming operations from incompatible development Encourage home-based businesses
Springwater	<ul style="list-style-type: none"> To create efficient, cost-effective development and land use patterns To promote strong urban communities To direct new growth to existing urban settlement areas 	<ul style="list-style-type: none"> <i>No specific mention of public service facilities in plan's goals</i> 	<ul style="list-style-type: none"> Encourage business investment and foster positive investment climate Promote economically viable urban communities
Tay	<ul style="list-style-type: none"> Remain predominantly rural with two major and two minor settlement areas Distribute growth to settlement areas and reduce volume of growth along shoreline and in rural areas Suspending further approvals of estate-type residential 	<ul style="list-style-type: none"> Foster a leisure, recreation, and educational opportunities for residents of all ages and incomes through partnerships Encourage and support initiatives to ensure access to health and social services in the community Expand year-round leisure/recreation facilities/programs 	<ul style="list-style-type: none"> Create economic diversity and stability by supporting traditional sectors and emerging sectors, and fostering training and entrepreneurship Encourage and support small and home-based business Provide for new and expansion of tourist commercial Tie into regional economic development initiatives
Tiny	<ul style="list-style-type: none"> Consolidation of residential and commercial development in existing settlement is encouraged; settlement area boundary expansions are discouraged Conversions of cottages to permanent residences will be monitored Provide clear spatial delineation between Midland and 	<ul style="list-style-type: none"> Improvement of infrastructure ("parks and other facilities") to improve service levels Provide parks and open spaces with clear functions Lands owned by municipality in the shoreline area shall be planned on their capacity for public use 	<ul style="list-style-type: none"> Encourage development which increases economic activity Strengthen the role of the Huronia Regional Airport Encourage home-based business Tourist commercial focussed on Balm Beach; commercial recreational must be in harmony with

Table 4.9: Summary of Goals, Objectives and/or Strategic Principles from Municipal Official Plans			
Municipality	Goals, Objectives and/or Strategic Principles		
	Development	Public Service Facilities	Economic Development
Wasaga Beach	<ul style="list-style-type: none"> Penetanguishene urban areas The Town shall guide and control all development (to prevent undue adverse impact to the environment) 	<ul style="list-style-type: none"> The Town, public authorities, and private individuals are encouraged to develop open spaces and recreational areas Encourage multi-level recreational trails to service both local and regional interests 	<ul style="list-style-type: none"> natural environment The rate of population growth of the Town shall be integrated with the rate of employment growth A balance of residential, commercial, and industrial assessment shall be sought

Table 4.10: Summary of Official Plan Growth Management Goals & Approach	
Municipality	Growth Management Goals and Approach
City of Barrie	<ul style="list-style-type: none"> Development on full services; monitor growth in order to avoid compromising ability to provide appropriate services Focus on economic diversification; new residential development shall not jeopardize the expansion of the City's industrial, institutional and commercial sector
City of Orillia	<ul style="list-style-type: none"> Desire for compact forms that make more efficient use of existing development or vacant lands Acknowledge the need for additional land
Town of Bradford West Gwillimbury	<ul style="list-style-type: none"> Defined Bradford Urban Area New development confined as much as possible to the area close to the existing urban boundary; protect rural area Expansion of settlement areas of Bond Head and Newton Robinson will depend on communal water and sewers or alternative and a detailed Secondary Plan
Town of Collingwood	
Town of Innisfil	<ul style="list-style-type: none"> Controlled and orderly growth on full services; primarily in urban areas Severances in Agricultural Policy areas is generally prohibited; limited in rural areas Provide for both permanent and seasonal residential in shoreline areas Use Secondary Plans to provide details of future growth in specific areas
Town of Midland	<ul style="list-style-type: none"> All development shall be on full municipal services Rural area and natural heritage features protected from inappropriate urbanization Growth in existing downtown and waterfront area
Town of New Tecumseth	<ul style="list-style-type: none"> Rural and small town character while accommodating controlled growth; provide growth opportunities for all urban areas; primarily focused on areas with services 3 primary urban settlement areas (Alliston, Beeton, Tottenham) 4 Hamlets; these help to direct development away from environmentally sensitive areas in the agriculture and rural areas move towards an assessment ratio of 60% residential and 40% commercial/industrial All new development requires municipal services
Town of Penetanguishene	<ul style="list-style-type: none"> Sustainable development approach Growth directed to urban serviced area; priority for any existing servicing capacity will be infill and small developments in easily connected areas Pattern of land use based on groups of complementary land uses All new development on the periphery of the built up area to be on municipal services therefore must be reasonably close to existing services Maintain rural buffer between Midland and Penetanguishene and Penetanguishene and hamlet of Toanche
Town of Springwater	<ul style="list-style-type: none"> 2 major communities are preferred for growth (Elmvale and Midhurst); direct urban development to the existing urban settlement areas restrict new non-farm development within a reasonable distance of Barrie and Wasaga Beach in order to maintain a clear separation between rural and urban land uses and prevent urban sprawl adjacent to urban areas new development outside of settlement areas is not permitted in identified significant natural heritage areas, on prime agriculture and mineral aggregate resource lands
Town of Wasaga Beach	<ul style="list-style-type: none"> Urban development area with full services will be the area for the majority of new development Rural landscape to be kept free of urban residential development; rural estate residential type subdivisions not permitted Designated areas for future industrial

Table 4.10: Summary of Official Plan Growth Management Goals & Approach	
Municipality	Growth Management Goals and Approach
	<ul style="list-style-type: none"> ▪ Restrict the creation of lots not serviced by municipal sewer and water ▪ Control residential development so that there is a balance between residential and industrial/commercial assessment ▪ Secondary Plans prior to approving new urban development ▪ Boundary illustrates the location and amount of anticipated total future growth
Township of Adjala-Tosorontio	<ul style="list-style-type: none"> ▪ The majority of residential growth directed to the existing hamlets within the limits of established servicing constraints; may be necessary to restrict the rate of rural growth if servicing constraints continue ▪ Agricultural designation preserved primarily for agricultural uses ▪ Rural areas are restricted to a mix of agricultural, recreation, low density residential and appropriate commercial, institutional and industrial
Township of Clearview	<ul style="list-style-type: none"> ▪ Major forms of development directed toward the urban settlements best equipped for these uses ▪ Agriculture will continue to be a dominant feature of the rural landscape; agricultural uses will be protected from incompatible development ▪ All future development will be serviced by full services; partial services only considered in areas that have already developed on partial services ▪ 3 primary settlement areas; although development in these areas is not automatic; future development boundary identifies lands deemed most logical for future growth; requires development of a Secondary Plan ▪ 10 secondary growth nodes; 2 major recreation destinations
Township of Essa	<ul style="list-style-type: none"> ▪ Agriculture continue to be a dominant feature of the rural landscape ▪ Minimize urbanization of agricultural area; consents still permitted ▪ Urban development directed primarily to Angus; some additional lower density development in Thornton and Baxter ▪ Four hamlets to allow development at a scale compatible with existing settlement ▪ Future residential development in Angus subject to servicing
Township of Oro-Medonte	<ul style="list-style-type: none"> ▪ Population concentration in a number of small rural settlement areas, along shoreline and some residential clusters in the central area of the Township; new settlement areas are not contemplated ▪ Provide municipal services as efficiently as possible to settlement areas
Township of Ramara	<ul style="list-style-type: none"> ▪ 10 recognized settlement areas; 2 types (Village = full services; Hamlet = partial services) ▪ establish efficient, cost effective and compact settlements ▪ ensure orderly and logical extension of existing development ▪ utilize existing infrastructure to increase capacity for growth ▪ utilize Secondary Plans to manage growth in settlement areas, including the establishment of development boundaries
Township of Severn	<ul style="list-style-type: none"> ▪ Directs majority of new growth to settlement areas <ul style="list-style-type: none"> ○ 4 Main (Coldwater, Washago, West Shore, Port Severn) ○ 5 Rural settlement ▪ Restrict development in Rural area; prohibit new residential development outside of settlement areas
Township of Tay	<ul style="list-style-type: none"> ▪ Remain predominantly rural in nature with two major (Victoria Harbour and Port McNicoll) and two minor (Waubashene and Waverley) settlement areas ▪ Settlement strategy will maintain the integrity of the natural heritage system, agricultural and resource lands and preserve rural character ▪ Encourage cost effective land use patterns; expansion of boundaries not considered until a Growth and Settlement and/or justification study is complete ▪ Strengthen role of settlement areas as focus of concentrated growth ▪ Strengthen role of rural areas for rural, resources and resource-based recreational activities by reducing amount of dispersed and scattered development ▪ Shoreline residential areas are generally not considered to be communities in the OP; allow conversion from seasonal to permanent residential
Township of Tiny	<ul style="list-style-type: none"> ▪ Growth expected to occur primarily on lands that were already designated for development in the previous OP ▪ 80% of future population is likely to occur in the shoreline area that is now evolving into a permanent residential community ▪ 15% of new growth likely in the hamlets; 5% of new growth in the rural area ▪ new residential development in the rural or agricultural area is not permitted

4.7.1 Observations on Goals, Objectives and/or Strategic Principles from Municipal Official Plans

There are many similarities among the goals, objectives and/or strategic principles in the official plans of the study area's municipalities – many relate directly back to Provincial policy direction and a desire for healthy, viable and liveable communities. There are also some notable differences. The differences generally relate either to unique circumstance (i.e. a shoreline community) or a philosophical difference in approach to growth and development.

With respect to broad growth management goals and strategic principles, most of the OP's made a general reference recognizing existing settlement areas and ensuring an adequate supply of developable land. Adjala-Tosorontio specifically referenced a desire to limit population growth. New Tecumseth takes a more proactive approach by 'accommodating' controlled growth. Most municipalities connect growth management goals with servicing capacity. Barrie, Midland, Innisfil, Wasaga Beach, Clearview and others make reference to full services; those municipalities that do not explicitly cite servicing criteria do reference directing growth to urban areas. There is some recognition of the role of compact form and intensification when it comes to growth management goals – Barrie, Collingwood, Ramara and Orillia make these statements. The remaining municipalities make statements related to maintaining a rural and small town character, providing a full range of housing types and affordability levels, and efficient land use patterns.

Communities

The majority of plans encourage that new urban development be directed to existing settlement areas, and if appropriate for the municipality's context, directed to serviced settlement areas (ie: Bradford West Gwillimbury, Essa, Clearview, Springwater, Wasaga Beach, Penetanguishene). The plans also encourage a broad range of housing types, densities and sizes, as well as making reference to affordable housing and housing for low-income households (ie: Wasaga Beach, Innisfil). There were some references to urban form – generally encouraging compact form; pedestrian-friendly scale and relationship; maintain a small town character; and transit-supportive (ie: Tiny, Oro-Medonte, Orillia, Collingwood). There were also references to intensification and in-filling in some of the plans. These policies reflect the broader Provincial policy direction for compact development and efficient use of land and infrastructure.

The notable differences or unique aspects in the official plans of municipalities include:

- Limited mention of phasing or the use phasing tools (e.g. secondary plans) to address the timing of development despite experiencing rapid growth. Some municipalities may use this approach but it did not come through in the existing policy framework;
- reference to future development consisting of predominantly single-detached or low density development despite the fact that these municipalities had serviced areas which

could support higher densities of development. These statements do not reflect the Province's clear direction for intensification;

- references to cottages and shoreline development, which reflected the historic recreational function of these municipalities. These statements may be in conflict with servicing policy direction, particularly if some of the shoreline communities are not recognized as communities in the context of the settlement hierarchy;
- Limited discussion on the concept of urban separators, where municipalities encourage a clear spatial definition between urbanized areas. The Province's Greenbelt and Places to Grow legislation in particular reference the intent for clear separators between urban and rural development.

Public Service Facilities

The majority of plans made reference to supporting and enhancing recreational opportunities, and specific mention of trails was common throughout these statements. While the plans did reference recreational facilities, they generally did not make reference to the broader range of public service facilities such as educational and health care facilities. Notable exceptions are Ramara and New Tecumseth.

A few official plans did reference joint-use arrangements for public service facilities and/or the development of public service facilities through partnerships. While public service facilities were mentioned overall, there was no reference made to the changing demographic trends locally and regionally, and the necessary linkage to public service facilities to meet the changing needs of the population.

Economic Development

Nearly all of the plans had a strong recognition of tourism to the local economy, especially the positive economic impacts of current and future recreational tourism (ie: Wasaga Beach, Springwater, Penetanguishene, Orillia). Many of the plans which comprised both urban and rural areas recognized the importance of agriculture to the local economy and generally encouraged agriculture to be maintained over the long-term (ie: Bradford-West Gwillimbury, Essa, Adjala-Tosorontio, New Tecumseth). There was some mention of significant industrial/commercial development supporting the tax bases, usually for municipalities which were fully-serviced and had lands with major road frontage (Highway 400, Highway 11, etc.) (ie: Clearview, Innisfil). There was also common reference to supporting the economic vitality of the downtown areas in the study area's municipalities. Furthermore, reference to supporting and encouraging home-based business was noted in many of the official plans. These policies generally reflect the economic policy drivers – a desire to protect agricultural land for agricultural production and supporting significant industrial/commercial development as part of the strong and vibrant vision for Ontario communities.

Only one plan (Wasaga Beach) explicitly mentioned the need to connect population growth with employment growth. One plan had specific mention of a significant employer in the area (CFB Borden). The only other mention of a specific local economic driver was the Huronia, Collingwood, and Lake Simcoe Airports (ie: Clearview, Tiny, Oro-Medonte). It is anticipated that the reference to certain sectors or industries in the goals reflect each municipality's individual economic objectives, and these references included agriculture, tourism, recreation, "knowledge industries," light/dry industrial development, and casino-related development.

Barrie and New Tecumseth were explicit in their intent to pursue more industrial and commercial development as part of their overall growth management strategy.

4.7.2 Planned Population in Official Plans

The planned population in an official plan forms an important basis for the long-term vision, growth / land use policies, and distribution of land uses in the document. All of the official plans in the study area were reviewed and their planned population numbers are provided in *Table 4.11*.

The summary illustrates that there are a variety of different approaches to the planned population target in the study area's plans. Some plans identify an individual target population, whereas other plans may suggest a range. Some plans may break down the planned population into 5 or 10 year increments, whereas other plans may not. It is also noted that the planning horizon is different among the plans. Of the plans which identify a population figure for 2016 allowing direct comparison to the County Official Plan target population figures, New Tecumseth and Tiny identify planned populations greater than the upper-tier target. Of the plans which identify a population for 2011, Collingwood and Innisfil identify planned populations in 2011 greater than the County-specified target population for 2016.

Table 4.11
Planned Population from Official Plans
Intergovernmental Action Plan for Simcoe, Barrie and Orillia

	From Municipal OP's				From County of Simcoe OP
	Horizon Year	Planned Population Target	Planned Population Range		Planned Population Target Horizon Year of 2016
			Low	High	
County of Simcoe					319,000 County Total
1. Township of Adjala-Tosorontio	2016	-	12,500	14,900	13,700
2. City of Barrie	2021	175,000			168,800 included Orillia
3. Town of Bradford West-Gwillimbury	2026	47,800			34,400
	<i>Bradford Urban Area</i>	2026	38,800		
	<i>Remaining areas</i>	2026	9,000		
4. Township of Clearview	2021	18,794			16,700
5. Town of Collingwood	2011	25,935			18,900
	2021	30,224			
6. Township of Essa	NA	22,000			18,400
7. Town of Innisfil	2011	45,200			40,800
8. Town of Midland	NA	Not stated			18,985
9. Town of New Tecumseth	2006	29,285			32,300
	2011	33,130			
	2016	37,485			
	2021	42,400			
	<i>Alliston</i>	2021	18,920		
	<i>Beeton</i>	2021	3,220		
	<i>Tottenham</i>	2021	9,360		
	<i>Tecumseth</i>	2021	10,900		
10. City of Orillia	NA	Not stated			168,800 included Barrie
11. Township of Oro-Medonte	2016	-	24,000	26,000	25,000
12. Town of Penetanguishene	2021	10,439			10,640
13. Township of Ramara	2006	-	9,980	10,502	12,400
	2011	-	10,806	12,022	
	2016	-	11,601	13,450	
	2021	-	12,127	15,057	
	2026	14,900	12,543	16,462	
14. Township of Severn	2026	19,400			15,500
15. Township of Springwater	2016	-	Pop'n increase of 8,300		22,600
16. Township of Tay	2006	9,595			11,175
	2011	10,182			
	2016	10,733			
	2021	11,257			
17. Township of Tiny	2006	27,794			13,000
	2011	29,219			
	2016	30,841			
	2021	32,633			
18. Town of Wasaga Beach	NA	35,000			14,400

5. DESCRIPTION OF EXISTING LAND USE AND DEVELOPMENT SITUATION IN STUDY AREA

5.1 Introduction

The PPS indicates that municipalities shall, where new development is to occur, "maintain land which has servicing capacity sufficient to provide at least a three year supply of residential units" through a combination of intensification, redevelopment, and land in draft and approved registered plans.

The study area is subject to numerous development applications. As the growth management process evolves, it is important to quantify the number of units included within these development applications in order to help determine whether current development is keeping pace with or is out-of-step with planned growth.

The following section of the report provides a discussion of previous development inventory information compiled for the study area. It also documents the approach used to obtain the development inventory statistics for IGAP and discusses the results of the inventory analysis.

5.2 Development Inventory Information - 2004 County Study and Phase 2 ECA of IGAP

The *Population, Households and Employment Forecasts Update* contains a summary of development applications and vacant land in Appendix 'A' of the report. A Development Inventory has been assembled as part of this ECA (see Section 5.3). The key elements of the ECA inventory are as follows:

Inventory Updated to 2005

The development inventory information in the 2004 County Study is dated between December 2002 to August 2004. The ECA inventory is based on data compiled in October 2005.

Standard Template Used to Collect the Development Approvals Information

A standard template was used to collect the development information from the municipalities in the study area. The data was collected by unit type and aggregated by density. The municipalities also provided updated land area information on their vacant designated land inventories.

ECA Development Inventory Information broken down by Density Category

For the purposes of the infrastructure gap analysis, the unit potential on the vacant land inventories was also collected by residential density categories of low (single-detached, semi-detached), medium (townhouses), and high (apartments). The density mix was either based on applicable secondary plans and/or directions from municipal staff.

A more detailed discussion of the development inventory information collected for the ECA is contained in the following sub-sections of this report.

5.3 Methodology

A request for information related to development inventory was forwarded by the Ministry of Municipal Affairs to each municipality in the study area in August 2005. The request included two tables: one for the development inventory by water service area, and the other for development inventory by sanitary sewage service area. The reason for collecting information using two different servicing criteria relates to potential policy direction for the servicing of planned growth.

Each table identified the density category and municipal/community name for which development statistics were required. The following direction was provided regarding density category and unit type:

Vacant Lots in Approved Plans of Subdivision: lots which are registered in Plans of Subdivision for which a building permit has not been issued.

Lots in Draft Approved Plans of Subdivision: represents lots/units which are in Draft Approved Plans of Subdivision.

Lots in Development Applications Being Reviewed: represents lots/units in development applications within approved settlement areas on which a decision has not been made.

Density categories: comprises low density (single-detached and semi-detached), medium density (townhouses), and apartments (walk-ups, etc.)

5.3.1 Conversion of Units to Population

To support the infrastructure gap analysis in the Infrastructure Assessment, the development inventory statistics needed to be converted to population from units. The number of persons-per-unit (PPU) being used in the Infrastructure Assessment was applied in this analysis. Reference should be made to the Infrastructure assessment Report for more detailed information on the PPU figures.

5.4 Development Inventory Tables

5.4.1 Development Inventory by Water Service Area

Table 5.1, the development inventory by water area summarizes the number of units, by density category, at their various stages of application. Highlights from the tables include:

- Number of approved units: 9,720
- Number of draft approved units: 18,243
- Number of units in applications pending a decision: 18,420
- Population estimate in approved units: 26,638
- Population estimate in draft approved units: 51,357
- Population estimate in units in applications pending a decision: 50,897.

5.4.2 Development Inventory by Sanitary Sewage Service Area

Table 5.2, the development inventory by sanitary sewage service area summaries the number of units, by density category, at their various stage of application. Highlights from the table are:

- Number of approved units: 9,161
- Number of draft approved units: 16,320
- Number of units in applications pending a decision: 15,890
- Population estimate in approved units: 25,441
- Population estimate in draft approved units: 45,834
- Population estimate in units in applications pending a decision: 43,702.

5.4.3 Comparison of Development Inventories by Water and Sanitary Sewage Area

The following *Table 5.3* summarizes the detailed development inventory information presented in *Tables 5.1 and 5.2*. A comparison between the Water and Sanitary Sewage Service Area inventories is provided after the summary.

Table 5.3: Comparison of Development Inventories by Water and Sanitary Sewage Area			
	Within Water Service Area	Within Sanitary Sewage Service Area	Difference Between Water and Sanitary Sewage Service Areas
Total number of units	46,383	41,371	5,012
Number of approved units	9,720	9,161	559
Number of draft approved units	18,243	16,320	1,923
Number of units in applications being reviewed	18,420	15,890	2,530
Low density units	32,885	27,875	5,010
Medium density units	8,934	8,934	0
High density units	4,564	4,562	0
Total population potential	128,891	114,977	13,914
Population estimate in approved units	26,638	25,441	1,197
Population estimate in draft approved units	51,357	45,834	5,523
Population estimate in units in applications being reviewed	50,897	43,702	7,195

Note: Numbers may not sum due to rounding

The following observations can be made:

- the difference in development inventory between water and sanitary sewage service areas is approximately 5,000 units or 14,000 people;
- the difference is mostly within the low-density category; and
- the difference is generally split between “draft approved” and “being reviewed” unit categories.

These observations highlight that, despite Provincial policy that emphasises compact development, infilling and intensification, current development inventory within the study area continues to favour traditional, low density, single detached units.

Development applications based on partial services (municipal water supply and private sewage disposal) if all approved, would accommodate approximately 14,000 people. This has significant implications based on a full municipal servicing strategy.

A discussion of the residual servicing capacity to accommodate these developments is provided in the Infrastructure Assessment Report, available under separate cover.

5.4.4 Mapping of Development Inventory

Many of the municipalities in the study area do not have the staff resources or the technical means to maintain up-to-date mapping of the applications in their development inventory. As a result, the mapping of every application in the study area was not possible.

5.5 Development Proposals: Urban Boundary Expansions and New Settlement Areas

MMAH has been monitoring major large developments in the study area. Furthermore, the County of Simcoe, as the approval agency for certain planning applications for the lower tier municipalities (e.g. Official Plan Amendments), maintains information about development proposals. Information on major development proposals being monitored by the MMAH and County of Simcoe has been collected and a conceptual map of these development applications has been prepared, in order to provide a sense of the scale of urban boundary expansions and the re-designation of rural land to urban land uses. The conceptual map of major development applications is provided as *Figure 5.1* and a summary of these applications is provided in *Table 5.4*.

The pressure for establishing new settlements and/or urban boundary expansions appears to be in the south end of the County – New Tecumseth, Innisfil and Essa have multiple applications. Bradford-West Gwillimbury is considering one sizeable application.

Five of the applications are for new communities. These new communities propose to add approximately 155,000 people and approximately 65,000 units to the study area. Most of the applications reflect comprehensive developments – offering housing, employment and other community and recreation services. The loss of rural/agricultural land base to accommodate these new communities is significant.

2003/04 was key timeframe for submission of these proposals. Seven applications have “no decision” status; one application has been turned down by the host municipality.



Intergovernmental Action Plan for Simcoe, Barrie and Orillia

Figure 5.1. Development Proposals Involving Establishment of New Settlement Areas or Expansion of Existing Urban Areas

LEGEND

- | | | |
|----------------------------------|---|---|
| IGAP Study Boundary ² | Proposed New Settlement Area ³ | Proposed Expansion of Existing Settlement Area ³ |
| Area Municipalities ² | <1000 ha in Size | <1000 ha in Size |
| Provincial Highways ¹ | 1000 ha - 2500 ha in Size | 1000 ha - 2500 ha in Size |
| County Roads ¹ | | |
| Ponds and Lakes ¹ | | |



Projection: UTM zone 17N NAD83
 Data Sources: 1. Ontario Ministry of Natural Resources
 2. Ontario Ministry of Municipal Affairs and Housing
 3. County of Simcoe

Created by: CCK
 Checked by: RB



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Last Modified March 3, 2006

Table 5.4: Proposed New Settlements and Settlement Area Boundary Expansions in the Study Area					
Application Name	Municipality	Type of Application	Description	Application/ Adoption Date (Lower Tier)	Application/ Adoption Date (Upper Tier)
<i>Bradford/Bond Head Urban Expansion</i>	Bradford-West Gwillimbury	OPA County OPA: proposed amendment to the population, household and employment projections to implement the Bradford Bond Head Planning Area.	Proposed 2,500 hectares urban expansion, to create a new mixed-use community with a population of 70,000, and 39,600 jobs located between Bradford and Bond Head.	Submitted: August 12/03 No decision to date	Submitted: August 2003 No decision to date
<i>Big Bay Point Resort</i>	Innisfil	Original application: proposes to redesignate subject lands from Agricultural to Shoreline and amend Shoreline Policy Area policies OPA 16: proposes to redesignate subject lands from Agricultural & Shoreline to Special Policy Area – Future Resort Community OPA 17: proposes to establish a Secondary Plan Zoning By-law amendment to implement OPA 17 County OPA: proposes to redesignate lands from Greenlands to Rural & Agricultural	Proposal to create a new 243 hectares community with a population of 13,700: with 2,861 residential units; 2,500 jobs; a marina with 1,150 boat slips; 200 room hotel & conference centre; an 18-hole golf course and commercial uses fronting on Lake Simcoe.	Original application submitted July 24/02 OPA 16 Adopted: Aug.10/04 OPA 17 Submitted: Oct. 27/04 Adopted: Dec. 8/04	Submitted: Sept.17/02 No decision to date * At OMB *

Table 5.4: Proposed New Settlements and Settlement Area Boundary Expansions in the Study Area					
Application Name	Municipality	Type of Application	Description	Application/ Adoption Date (Lower Tier)	Application/ Adoption Date (Upper Tier)
<i>Watersands Secondary Plan</i>	Innisfil	OPA	Proposal to create a new community with a population of 52,800; 16,500 residential unit; and 29,000 jobs.	Submitted: August 24, 2004 No decision	No application received to date
<i>Leonard's Beach Secondary Plan</i>	Innisfil	OPA	Proposal to create a new community with a population of 19,000 and 6,319 residential units.	Submitted: June 24, 2004 No decision	No application received
<i>Sandycove District Secondary Plan</i>	Innisfil	OPA	Proposed 546 hectare urban expansion, with approximately 700-900 dwelling units (3 proposals).	One application received for 219 lots, submission date tbd. No decision	No application received
<i>Belterra Secondary Plan</i>	New Tecumseth	OPA Zoning By-law amendment Subdivision	Proposed 1,000 acre urban expansion for a mixed use community of 1,950 residential units	Submitted: Nov.14/02 Adopted: June 2, 2003 (OPA 27)	No decision to date No County OPA required
<i>Beeton Secondary Plan</i>	New Tecumseth	OPA	Municipally initiated proposal for a 300 acre urban expansion for a mixed use community with a population of 4500.	Submitted: n/a Adopted: January 10/05 (OPA 31)	No decision to date No County OPA required

Table 5.4: Proposed New Settlements and Settlement Area Boundary Expansions in the Study Area					
Application Name	Municipality	Type of Application	Description	Application/ Adoption Date (Lower Tier)	Application/ Adoption Date (Upper Tier)
<i>Huntington Woods Seniors Supportive Housing Project</i>	New Tecumseth	OPA Zoning by-law amendment	Proposal for 336 residential units, a 1,200 square meter community centre, 3.9 acre park, and a 7,500 square meter health care facility	Submitted: March 2004 No decision to date	No decision to date No County OPA required
<i>Alliston Industrial/ Commercial Secondary Plan</i>	New Tecumseth	OPA	Municipally initiated proposal for a 400 acre urban expansion for industrial uses	Submitted: n/a Adopted: October 27, 2003 (OPA 29)	Local OPA approved by County
<i>Hawthorne Glen Community Boundary Expansion</i>	New Tecumseth (Tottenham)	OPA Zoning By-law amendment Subdivision Re-designate from Rural Agricultural to Residential	Proposed 71.2 hectare expansion for a new mixed use community with 645 residential dwelling units	Submitted: Feb. 26/03 No decision to date	No decision to date No County application

Table 5.4: Proposed New Settlements and Settlement Area Boundary Expansions in the Study Area					
Application Name	Municipality	Type of Application	Description	Application/ Adoption Date (Lower Tier)	Application/ Adoption Date (Upper Tier)
<i>Lefroy Belle Ewart Secondary Plan</i>	Innisfil	OPA Zoning By-law Amendment	Proposed 1,000 hectare secondary plan for incorporating a mix of uses and approximately 4600 dwelling units; population is estimated at 14,000 with a potential of 20,000 to 25,000	Submitted: May 2005 No decision to date	No County application
<i>UCCI/Baywinds Adult Lifestyle Community</i>	Oro- Medonte	County OPA: redesignate lands from Greenland to Rural & Agricultural OPA: redesignate lands from rural to adult lifestyle Zoning By-law amendment	Proposed 111 hectare, residential adult lifestyle community, with 386 units and an 18-hole golf course.	Submitted: Dec.21/01 Adopted: Oct.15/03	Submitted: July 30/02 Adopted: June 22/04 Note: County did not make a decision on the lower tier OPA. * At OMB *
<i>Ferndale-Angus (Rainbow Valley Campground)</i>	Essa	OPA: redesignate from Commercial Recreation to Residential and expand settlement area boundary Zoning By-law amendment; Subdivision	Proposed urban expansion with 10 hectare subdivision with 175 lots	Submitted: June/05 No decision to date	No decision to date No County OPA required

Table 5.4: Proposed New Settlements and Settlement Area Boundary Expansions in the Study Area					
Application Name	Municipality	Type of Application	Description	Application/ Adoption Date (Lower Tier)	Application/ Adoption Date (Upper Tier)
<i>William Train Development (Founder's Village)</i>	Wasaga Beach	OPA: Redesignate from Rural to Residential Zoning By-law amendment; Subdivision	Proposed 13 hectare subdivision with 128 units	Submitted: May/05 No decision to date	No decision to date No County OPA required
<i>Hoggs Hollow</i>	Tay	OPA: re-designate from Rural to Village Residential, ZBA, Subdivision	Proposed urban expansion of 95 ha with 300 units and an 18 hole golf course	Submitted: Approved: Nov.28/03	Submitted: Dec.10/03 No decision to date

Source: Ministry of Municipal Affairs and Simcoe County

5.5.1 Secondary Plans Currently Underway

In addition to major development applications which propose new settlement areas or expansion of existing urban boundaries, there are also certain secondary plans which are underway for the build-out of lands within the existing urban boundary or service area of certain municipalities. Based on information provided by the County of Simcoe, these secondary plans are:

- Mountain Road West Corridor Secondary Plan (Town of Collingwood), which is being prepared by the municipality;
- Highway 26 East Corridor (Town of Collingwood), which is pending preparation of the secondary plan for 270 hectares including lands which have several constraints to development;
- Midhurst Secondary Plan (Township of Springwater), which is being prepared by the municipality;
- Centre Vespra Secondary Plan (Township of Springwater), which is being prepared by the municipality with an EA underway to explore feasibility of full services;
- Atherley Uptergrove Secondary Plan (Township of Springwater), which is being prepared by the municipality

6. DESCRIPTION OF PLANNED LAND USE

6.1 Introduction

Planned land use in the study area comprises three components: intensification, in-fill, and vacant lands. These three categories of planned development are important to understanding the growth picture in the study area. Encouraging intensification and in-fill within existing built-up areas can reduce the amount of greenfield lands needed to support projected growth. In the study area, there is an understanding that growth is outpacing certain municipalities' ability to plan for vacant lands. The ability for a municipality to manage growth through pro-active measures such as intensification, in-fill, and identifying suitable greenfield development areas are key to effective long-term sustainability.

6.2 Residential Intensification

The PPS defines residential intensification as "a net increase in residential units or accommodation" and includes brownfield redevelopment, the development of vacant/underutilized lots within previously developed areas, in-fill, and conversions/expansions of existing uses to residential uses.⁵ For IGAP, in-fill was treated separately from intensification. This section describes the methodology for determining planned intensification and observations from the results of the analysis. The analysis of in-fill is provided in the following subsection.

6.2.1 Methodology for Determining Planned Intensification

The approach for determining planned residential intensification looked at:

- Urban settlement areas which are serviced by municipal water and sanitary sewer services; and
- Downtown, main street, and urban corridor areas where residential development is currently permitted by the applicable official plan land use designation.

The review of intensification also identifies where official plan designations were silent or did not specifically permit intensification.

It is noted that this approach focuses on planned intensification. Potential intensification on vacant or underutilized lands in the built-up area where residential is currently not permitted in the applicable official plan designation (e.g. commercial lands, industrial lands, etc.) is not included.

⁵ While the PPS identifies in-fill as being part of the intensification, it is treated distinctly in IGAP.

The steps undertaken to calculate the planned intensification were:

- Review the official plans and identify the land use designations which provided for residential mixed-use as-of-right;
- Using a visual check of the official plan mapping provided by the County of Simcoe, identify those areas that are downtown, main street, or urban corridors (the usual focus for mixed-use residential intensification);
- Determine the area of the lands designated for uses which include residential as-of-right provisions;
- Calculate 75% of the area (assuming that 25% of the area would be for roads, rights-of-way, etc.) to determine the net area of intensification lands; and
- Multiply the area by the permitted density in the designation, or equivalent where appropriate, to determine the number of dwelling units.

The intensification analysis is based on official plan policy permissions only. It does not take into account site physical potential, existing land use, site development considerations ie. servicing and traffic/access, land owner interest in development, land use compatibility issues or market considerations. In the next phase of IGAP (Phase III Part 2 – Growth Potential Assessment), a more detailed analysis of intensification potential will be undertaken. In the interim, for the purposes of the infrastructure gap analysis in this phase of IGAP, four population potential scenarios were developed: one assuming no intensification and three levels of intensification based on density (all low density, all medium density, all high density). It is recognized that the intensification potential will be somewhere in between the low and high range.

The estimate of population arising from intensification is based on the same approach using PPU's as applied for the development inventory, as described in Section 5 of this report.

6.2.2 Results of Residential Intensification Analysis

Figure 6.1 illustrates the intensification areas and *Table 6.1* shows the results of the intensification analysis. Observations regarding the number of units, persons and take-up of infill are provided below.

Intensification is generally encouraged widely in the official plans in the study area, although there were no intensification policies in the Official Plans for Essa, Innisfil, Tay or Wasaga Beach. In the plans where intensification is permitted, it is addressed through general development policies, settlement area policies, or policies specific to land use types.



Intergovernmental Action Plan for Simcoe, Barrie and Orillia

Figure 6.1. Intensification Areas

- LEGEND**
- IGAP Study Boundary²
 - Provincial Highways¹
 - Ponds and Lakes¹
 - Area Municipalities²
 - County Roads¹
 - Intensification Areas⁷



Projection: UTM zone 17N NAD83
 Data Sources: 1. Ontario Ministry of Natural Resources
 2. Ontario Ministry of Municipal Affairs and Housing
 7. Simcoe County (from member municipalities)

Created by: HGS
 Checked by: AMJ



Table 6.1
Analysis of Planned Intensification
Intergovernmental Action Plan for Simcoe, Barrie and Orillia

Municipality	Sub Area	Servicing Type	Intensification permitted in OP? (Yes/No, Section)	Summary of intensification policy(ies)	OP Designation(s) where mixed use is expected	Policy reference to residential uses permitted in mixed use area	Stated density or cross-reference	Density target(s) in related Residential OP policy(ies)	Notes	Source	Gross Area (ha)	Net Area (ha)	Unit Potential (low density)*	Unit Potential (medium density)*	Unit Potential (high density)*	PPU	Pop'n Potential (low density)*	Pop'n Potential (medium density)*	Pop'n Potential (high density)*
Barrie	n/a	Full	Yes; Section 3.3.2.1(c)	"...conversion of existing housing into multiple unit forms; infill, redevelopment; and other innovative strategies."	City Centre	Section 4.3.2.2: "Residential uses are recognized"; "High and medium density residential development"	Reference made to Residential section of OP for densities	Section 4.2.2.2: Res Med 53 units per net hectare (walk up apartment); Res High above 53 units per net hectare		City of Barrie, Official Plan, 1994.	134.7	101.0	0	5,355	5,355	2.7	0	14,459	14,459
Bradford West Gwillimbury	Bradford	Full	Yes; Section 5.2.2.1; Section 5.4.5	"encouraged in the downtown core"; "encouraged throughout the urban area."	Commercial Core (Central Business District)	Section 5.3.2.3: "Residential... uses are encouraged on floors above the ground floor level"	No reference made to residential density within the "Commercial Core" designation	Section 5.3.1.6: Res Low 24 units per net hectare, Res Med 40 units per net hectare, Res High 75 units per net hectare		Town of Bradford West Gwillimbury, Official Plan, 2000 (consolidated to October 2002).	29.1	21.9	524	874	1,639	3.1	1,626	2,710	5,081
Clearview	Creemore	Full	Yes; Section 4.6.4	"conversion... to accommodate one accessory apt., major and minor infilling..."	Commercial	Section 4.7.2.1(1): "residential uses in the upper storey or in the rear of the ground storey of a commercial building"	No reference made to residential density within the "Commercial" designation	Section 4.6.2.3: Res Low 12-15 units per gross hectare, Res Med 50 units per gross hectare		Township of Clearview, Official Plan, 2001 (approved 2002).	13.4	10.1	202	672	0	2.8	564	1,881	0
	Stayner	Full	Yes; Section 4.6.4	"conversion... to accommodate one accessory apt., major and minor infilling..."	Commercial	Section 4.7.2.1(1): "residential uses in the upper storey or in the rear of the ground storey of a commercial building"	No reference made to residential density within the "Commercial" designation	Section 4.6.2.3: Res Low 12-15 units per gross hectare, Res Med 50 units per gross hectare		Township of Clearview, Official Plan, 2001 (approved 2002).	43.9	32.9	659	2,195	0	2.8	1,844	6,147	0
Collingwood	Collingwood	Full	Yes; Section 4.4.3.3	"support intensification... within the Downtown Core"	Downtown Core	Section 4.4.4.3: "primarily apartments may be permitted"	Reference made to apartments, but no density stated within the "Downtown Core" designation	Section 4.3.4.6.2: Res High 100 units per gross hectare		Town of Collingwood, Official Plan, May 27, 2004.	33.9	25.4	0	0	8,370	2.4	0	0	20,088
Essa	Angus	Full	No - Plan is silent on intensification	n/a	n/a	n/a	n/a	n/a		Township of Essa, Official Plan, July 6, 2001.	n/a	n/a	0	0	0	3	0	0	0
Innisfil	Alcona	Full	No - Plan is silent on intensification	n/a	n/a	n/a	n/a	n/a		Town of Innisfil, Official Plan, 2002 (office consolidation).	n/a	n/a	0	0	0	3.2	0	0	0
	Cookstown	Full	No - Plan is silent on intensification	n/a	n/a	n/a	n/a	n/a		Town of Innisfil, Official Plan, 2002 (office consolidation).	n/a	n/a	0	0	0	3.2	0	0	0
Midland	n/a	Full	Yes; Section 2.3.2	"It is important to... allow for the appropriate intensification of new and innovative housing."	Downtown District	Section 3.2.2(c): "Residential uses are recognized and encouraged"; Section 3.2.3(i): "High and medium density residential development and mixed commercial / residential development are permitted..."	Reference made to Residential section of OP for densities	Section 3.3.5(b): Res Med 30 units per net hectare; Section 3.3.6(b) Res High 60 units per net hectare	Residential units "may be permitted" in the Employment Areas designation, but it was considered unlikely that residential intensification would occur in business parks and would be encouraged in the downtown area.	Town of Midland, Official Plan, (updated to) 2004.	32.1	24.1	0	723	1,446	2.8	0	2,024	4,049
New Tecumseth	Alliston	Full	Yes; Section 7.10.2(f)	"Apartment units may be permitted above commercial uses in the commercial core areas" (subject to conditions)	Commercial Core and Urban General Commercial	Section 7.10.2(f) and 7.11.2(d) "Apartment units may be permitted above commercial uses"; "Apartment units may be permitted above any commercial or business use, except an automotive use"	Reference made to apartments, but no density stated within the "Commercial Core" and "Urban General Commercial" designations	Section 7.9.2(c)(ii): High density residential consists of apartments not exceeding 75 units per site hectare		Town of New Tecumseth, Official Plan, 2003 (office consolidation)	37.2	27.9	0	0	2,090	2.8	0	0	5,851
New Tecumseth	Beeton	Full	Yes; Section 7.10.2(f)	"Apartment units may be permitted above commercial uses in the commercial core areas" (subject to conditions)	Commercial Core and Urban General Commercial	Section 7.10.2(f) and 7.11.2(d) "Apartment units may be permitted above commercial uses"; "Apartment units may be permitted above any commercial or business use, except an automotive use"	Reference made to apartments, but no density stated within the "Commercial Core" and "Urban General Commercial" designations	Section 7.9.2(c)(ii): High density residential consists of apartments not exceeding 75 units per site hectare		Town of New Tecumseth, Official Plan, 2003 (office consolidation)	0.2	0.2	0	0	11	2.8	0	0	32
New Tecumseth	Tottenham	Full	Yes; Section 7.10.2(f)	"Apartment units may be permitted above commercial uses in the commercial core areas" (subject to conditions)	Commercial Core and Urban General Commercial	Section 7.10.2(f) and 7.11.2(d) "Apartment units may be permitted above commercial uses"; "Apartment units may be permitted above any commercial or business use, except an automotive use"	Reference made to apartments, but no density stated within the "Commercial Core" and "Urban General Commercial" designations	Section 7.9.2(c)(ii): High density residential consists of apartments not exceeding 75 units per site hectare		Town of New Tecumseth, Official Plan, 2003 (office consolidation)	28.6	21.4	0	0	1,607	2.8	0	0	4,500
Orillia	n/a	Full	Yes; Section 3.1.1	"Compact forms of development that make more efficient use of existing developed or vacant lands... will be encouraged."	Downtown District	Section 4.2.2(a): "may include... residential uses"; Section 4.2.3(b): "residential uses... locating on upper floors"; Section 4.2.3(c): "Densities... may be mixed... Mixed commercial and residential dev't shall be encouraged in new or existing structures"	Policies in "Living Area" section of plan encourage medium and high density development to locate in the Downtown District.	Section 4.3.7(a): Res Med 25 to 40 units per net hectare; Section 4.3.8(a) Res High 42 to 100 units per net hectare		City of Orillia, Official Plan, November 8, 1999.	69.2	51.9	0	2,076	5,190	2.95	0	6,124	15,311
Penetanguishene	Penetanguishene	Full	Yes; Section 1.2.4	"Compact development shall be promoted within the urban serviced area"	Central Commercial Core	Section 1.2.6: "the town is committed to... intensification" and Section 3.3.2(1) "Central Commercial... permitted uses (include)... duplex, semi-detached and multiple residences..."	Reference to policies of subsection 3.1, Neighbourhood Residential	Section 3.1.6.2: Medium Density 30 units per net hectare, High Density 74 units per net hectare.	Section 3.1.5.3 outlines a series of conditions that must be met for multiple housing.	Town of Penetanguishene, Official Plan (DRAFT) Consolidation, October 28, 1999.	27.2	20.4	0	612	1,509	2.9	0	1,775	4,377
Ramara	Brechin	Full	Yes; Section 3.3.3	"Encourage residential intensification within the settlements"	Village Commercial	Section 9.5.2(b): "an accessory dwelling unit above or within a permitted commercial or business use"	No reference made to residential density within the "Village Commercial" designation	Section 9.5.3: Res Low 12 units per net hectare, "multiple" dwellings at 24 units per net hectare		Township of Ramara, Official Plan, January 22, 2004.	45.5	34.1	409	819	0	2.5	1,023	2,047	0
Ramara	Lagoon City	Full	Yes; Section 3.3.3	"Encourage residential intensification within the settlements"	None	n/a	n/a	n/a		Township of Ramara, Official Plan, January 22, 2004.	n/a	n/a	0	0	0	2.5	0	0	0
Severn	Washago	Full	Yes; Section A2.9.2(b)	"Encourage and support opportunities for mixed-use development in appropriate locations that assist in the achievement of residential intensification..."	Settlement Employment Area (Downtown)	Section C4.4.3.1c "encourage the development mix of uses to enhance the character of the downtown areas"	No reference made to prescribed residential density	n/a	Settlement Employment designation is unclear regarding residential intensification in the "Downtown". Downtown area not mapped in OP.	Township of Severn, Official Plan, 2002	n/a	n/a	0	0	0	2.7	0	0	0
Severn	Coldwater	Full	Yes; Section A2.9.2(b)	"Encourage and support opportunities for mixed-use development in appropriate locations that assist in the achievement of residential intensification..."	Settlement Employment Area (Downtown)	Section C4.4.3.1c "encourage the development mix of uses to enhance the character of the downtown areas"	No reference made to prescribed residential density	n/a	Settlement Employment designation is unclear regarding residential intensification in the "Downtown". Downtown area not mapped in OP.	Township of Severn, Official Plan, 2002	n/a	n/a	0	0	0	2.7	0	0	0
Springwater	Elmvale	Full	Yes; Section 6.2.7	"intensification of residential uses may be considered to increase the potential supply of new housing units"	General Commercial	Residential uses not permitted in "General Commercial" designation	n/a	n/a	Specific policies in Section 5.3 regarding the redevelopment of the former rail terminus to the east and south of the existing built-up area of Port McNicoll, and an anticipated 650 residential units in the Village Residential designation, has not been accounted for.	Township of Springwater, Official Plan, July 24, 2003 (office consolidation).	n/a	n/a	0	0	0	3	0	0	0
Tay	Port McNicoll	Full	No - Plan is silent on intensification	n/a	n/a	n/a	n/a	n/a		Township of Tay, "Consolidated" Official Plan, July 8, 1998 (approved by MMAH February 23, 1999).	n/a	n/a	0	0	0	2.9	0	0	0
	Victoria Harbour	Full	No - Plan is silent on intensification	n/a	n/a	n/a	n/a	n/a		Township of Tay, "Consolidated" Official Plan, July 8, 1998 (approved by MMAH February 23, 1999).	n/a	n/a	0	0	0	2.9	0	0	0
Wasaga Beach	Wasaga Beach	Full	No - Plan is silent on intensification	n/a	n/a	n/a	n/a	n/a		Town of Wasaga Beach, Official Plan, September 9, 2003	n/a	n/a	0	0	0	2	0	0	0

Potential through intensification (not mutually exclusive): 1,794 units* 13,326 units* 27,218 units* 5,058 pers.* 37,168 pers.* 73,748 pers.*

*Note: Gross estimate of intensification should be refined through additional study. Refer to Section 6.2.1 of the report.

There is a potential for 1,794 low density units, 13,326 medium density units, or 27,218 high density units of intensification in the study area based on the above-noted policy permission approach. The intensification potential ranges somewhere between the 1,794 units and 27,218 units or from 5,058 persons to 73,748 persons of population.

6.3 Residential In-Fill

The PPS does not define residential in-fill; however, the County of Simcoe Official Plan's defines residential in-filling as "the creation of a residential lot between two existing non-farm residences which are on separate lots of a similar size and which are situated on the same side of the road and where residences are not more than 100 metres apart." Given the mention of "farm residences" in the County of Simcoe's definition of in-filling, it is anticipated that this definition has been worded to address lot creation issues in agricultural areas. It is further anticipated that the concept of in-filling could be interpreted differently within a settlement area.

The methodology and observations resulting from the in-fill analysis for the Communities analysis is provided in this subsection of the report.

6.3.1 Methodology for Determining In-Fill

The approach for determining planned residential in-fill looked at:

- Settlement areas which are serviced by partial services (municipal water supply and private sanitary sewage disposal); and,
- All partially-serviced areas with residual water capacity⁶, excluding discrete residential subdivisions serviced by partial services since any residual lots would be counted through the development inventory table.⁷

It is noted that the approach to in-filling is primarily an exercise to quantify development which would occur through the logical "rounding out" or filling-in of settlements, where this is permitted in the official plan. It does not consider in-fill potential on rural lands in the study area since a large portion of the study area are prime agricultural lands and the PPS prohibits residential lot creation on prime agricultural lands.

The steps undertaken to calculate in-fill potential were:

⁶ Section 1.6.4.5 of the PPS permits partial services within settlement areas to allow for infilling and rounding out of existing development on partial services as long as there is reserve capacity in the municipal system. Water was used as the measure of residual capacity since it is a more complex exercise to determine the residual capacity in sewage systems as per haulage requirements in the PPS.

⁷ If the service area is larger than the existing subdivision, then it falls into the category of urban settlement with partial services

- Identify the settlement areas on partial services;
- Confirm that the settlement area had residual water capacity and was not a discrete residential subdivision;
- Confirm that the settlement area was a designated settlement area in the County Official Plan;
- Review local official plans to confirm that in-filling was permitted in the official plan designation (e.g. village, hamlet, settlement area, etc.);
- Determine vacant lands through a visual comparison of digital air photography of the study area provided by the County of Simcoe and the Official Plan land use map, considering:
 - The in-fill lands were within an existing built-up area of the settlement;
 - The in-fill lands were abutting or adjacent to existing residential development;
 - The lands were not on the fringe areas of the settlements (since this would constitute vacant land supply);
 - The lands did not appear to be constrained by an environmental feature; and,
 - The size of the lands and the fabric of existing development appeared to be conducive to in-fill development on the lands.
- Calculate the acreage of the vacant lands and assume a one acre lot size for residential development.⁸

The estimate of population through in-fill is based on the same approach used for the development inventory, as described in Section 5 of this report.

6.3.2 Results of the Residential In-Fill Analysis

Table 6.2 shows the results of the in-fill analysis. Observations regarding the number of units, persons and take-up of infill are provided below.

In-filling is generally encouraged widely in the official plans in the study area. In these plans, in-filling is addressed through general development policies, settlement area policies, or policies specific to land use types.

There is a potential for 113 low density units to be developed through in-fill in the partially serviced settlements in the study area which are recognized as settlements in the County of

⁸ Although lots on piped water and private septic systems may be less than an acre (e.g. lot serviced by municipal water and a Waterloo Biofilter system are being approved by local Health Units on 12,000 – 15,000 square foot lots), many of the municipal Official Plans still make reference to a minimum one acre parcel size.

Table 6.2
Analysis of In-Fill Potential
Intergovernmental Action Plan for Simcoe, Barrie and Orillia

Municipality	Sub Area	Servicing Type	In-filling permitted in OP? (Yes/No, Section)	Summary of in-filling policy(ies)	OP Designation(s) where residential in-filling is permitted	Notes	Source	Area (ha)	Unit Potential (low density)	PPU	Pop'n Potential
Adjala-Tosorontio	Colgan	Partial	Yes; Section 4.6.1.11	"...development by infilling may take place"	"Residential" on Schedule 'B-1'		Township of Adjala-Tosorontio, Official Plan, November 2000 (consolidation)	0.5	1	3.1	4
Adjala-Tosorontio	Hockley	Partial	Yes; Section 4.6.1.11; Section 4.6.2.3(b)	"...development by infilling may take place"; "limit future development to infilling and rounding out..."	"Residential" on Schedule 'B-2'		Township of Adjala-Tosorontio, Official Plan, November 2000 (consolidation)	0.9	2	3.1	7
Adjala-Tosorontio	Loretto	Partial	Yes; Section 4.6.1.11; Section 4.6.2.3(b)	"...development by infilling may take place"; "limit future development to infilling and rounding out..."	"Residential" on Schedule 'B-3'		Township of Adjala-Tosorontio, Official Plan, November 2000 (consolidation)	4.3	11	3.1	33
Adjala-Tosorontio	Rosemont	Partial	Yes; Section 4.6.1.11	"...development by infilling may take place"	"Residential" on Schedule 'B-4'	A secondary plan is required before any major new development will be permitted (Section 4.6.1.2).	Township of Adjala-Tosorontio, Official Plan, November 2000 (consolidation)	0.9	2	3.1	7
Adjala-Tosorontio	Everett	Partial	Yes; Section 4.6.1.11	"...development by infilling may take place"	"Residential" on Schedule 'B-5'		Township of Adjala-Tosorontio, Official Plan, November 2000 (consolidation)	2.2	5	3.1	17
Adjala-Tosorontio	Lisle	Partial	Yes; Section 4.6.1.11	"...development by infilling may take place"	"Residential" on Schedule 'B-6'		Township of Adjala-Tosorontio, Official Plan, November 2000 (consolidation)	1.4	3	3.1	11
Bradford-West Gwillimbury	Newton Robinson	Partial	Yes; Section 6.2.4	"Limited residential infilling... may be recognized"	Newton Robinson "Settlement Area" on Schedule 'A'		Town of Bradford West Gwillimbury, Official Plan, 2000 (consolidated to October 2002).	0.4	1	3.1	3
Clearview	New Lowell	Partial	Yes; Section 4.6.4.2(1); Section 7.2.1(2)	"residential infilling... may be encouraged"; "consideration may be given to... [partial] servicing approach ...for residential infilling";	"Special Servicing Area" within the "Residential" designation on Schedule 'A2'		Township of Clearview, Official Plan, 2001 (approved 2002).	5.8	14	2.8	40
Essa	Baxter	Partial	Yes, indirectly through Consent policies; Section 26.6.1(g)	"Applications for consent... [represent] the logical infilling of an existing settlement area..."	"Residential" on Schedule 'D'		Township of Essa, Official Plan, July 6, 2001.	0.7	2	3	5
Essa	Thornton	Partial	Yes, indirectly through Consent policies; Section 26.6.1(g)	"Applications for consent... [represent] the logical infilling of an existing settlement area..."	"Residential" on Schedule 'C'		Township of Essa, Official Plan, July 6, 2001.	4	10	3	30
Innisfil	Churchill	Partial	Yes; Section 5.13.3	"Development may take the form of infilling..."	"Residential" on Schedule 'D'		Town of Innisfil, Official Plan, 2002 (office consolidation).	1.4	3	3.2	11
Innisfil	Stroud	Partial	Yes; Section 5.13.3	"Development may take the form of infilling..."	"Residential" on Schedule 'C'		Town of Innisfil, Official Plan, 2002 (office consolidation).	3.8	9	3.2	30
Innisfil	Gilford	Partial	Yes; Section 5.13.3	"Development may take the form of infilling..."	"Residential" on Schedule 'E'		Town of Innisfil, Official Plan, 2002 (office consolidation).	5.4	13	3.2	43
Oro Medonte	Hawkestone	Partial	No.	n/a	n/a	Special exclusion in Section E1.6 defers all permitted development until a Secondary Plan is completed.	Township of Oro-Medonte, Official Plan, April 13, 2005 (consolidated version).	n/a	n/a	2.7	n/a
Oro Medonte	Horseshoe Valley	Partial	No.	n/a	n/a	Special exclusion in Section E2.5 defers all permitted development through a holding zone.	Township of Oro-Medonte, Official Plan, April 13, 2005 (consolidated).	n/a	n/a	2.7	n/a
Oro Medonte	Sugar Bush	Partial	Yes; Section A2.3.1; indirectly through consent policy Section D4.3.2	"A very limited amount of rural residential development... through the process of infilling, may be permitted"; consent policies permit infilling	"Sugarbush Settlement Node Boundary" on Schedule 'A16'		Township of Oro-Medonte, Official Plan, April 13, 2005 (consolidated).	1.1	3	2.7	7
Springwater	Anten Mills	Partial	Yes; Section 3.10, Section 8.2.1.1	"encouraged to locate on an infilling basis..."; "...the approval of a limited amount of residential infill type development"	"Urban Residential" on Schedule 'A-4'		Township of Springwater, Official Plan, July 24, 2003 (office consolidation).	0.8	2	3	6
Springwater	Hillsdale	Partial	Yes; Section 3.10, Section 8.5.1.2	"encouraged to locate on an infilling basis..."; "...the approval of a limited amount of residential infill type development"	"Urban Residential" on Schedule 'A-7'		Township of Springwater, Official Plan, July 24, 2003 (office consolidation).	3	7	3	22
Springwater	Minesing	Partial	Yes; Section 3.10	"encouraged to locate on an infilling basis..."	"Urban Residential" on Schedule 'A-9'		Township of Springwater, Official Plan, July 24, 2003 (office consolidation).	2.5	6	3	19
Tiny Township	Wyevale	Partial	Yes, indirectly through consent policies; Section B7.5.3	Consent policies permit infilling	"Settlement Area" on Schedule 'A'		The Township of Tiny, Official Plan, January 13, 2005 (consolidated copy).	2.8	7	2.6	18
Tiny Township	Perkinsfield	Partial	Yes, indirectly through consent policies; Section B7.5.3	Consent policies permit infilling	"Settlement Area" on Schedule 'A'		The Township of Tiny, Official Plan, January 13, 2005 (consolidated copy).	4.9	12	2.6	31

Total potential (low density) through in-fill: 113 units 343 persons

Note: Numbers may not sum due to rounding

Simcoe Official Plan. The 113 low density units are all expected to be single-detached units and would accommodate 343 persons.

Given the significant growth forecasted for Simcoe in the *Places to Grow* Growth Plan, in-filling represents less than one percent of the 30-year demand for additional units in the study area. While in-filling is important for efficient use of land and compact urban form, it appears that other mechanisms such as intensification/redevelopment and greenfield development (where adequately justified) can address growth in the study area.

Given that there is a small amount of in-fill potential this does not necessarily mean that all of the in-fill lands will be absorbed in the short-term. It is difficult to determine how successful municipalities have been at encouraging in-fill without more detailed, historic data on development in these settlement areas.

6.4 Vacant Lands

The PPS requires planning authorities to maintain a land supply for growth for "a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands which are designated and available for residential development." The PPS further defines that these "designated and available" lands are lands designated in municipal official plans for residential land uses (including lands which are subject to a secondary planning process). Determining whether an adequate supply of designated, unconstrained and serviceable vacant lands is in fact available is a matter which has been the subject of certain planning appeals to the Ontario Municipal Board in the study area and throughout Ontario.

The following section of this report describes the methodology used to determine the supply of vacant lands, the unit yield on these vacant lands, and the population which may be accommodated on these lands. Observations related to the analysis of this information are also provided.

6.4.1 Methodology for Vacant Lands

Information for vacant lands was provided by the municipalities in the study area. In order to delineate the vacant lands, municipalities were asked to provide the acreage of lands which were:

- Within an existing, approved urban boundary;
- Designated for residential land uses;
- Not constrained by environmental features which are protected from development as stated in the PPS (flood plains, Provincially significant wetlands, ANSI's, ESA's); and
- Not subject to a development application.

Certain municipalities have designated residential land in terms of low, medium, and high density development, and were able to specifically provide the acreage of vacant lands by density category. Other municipalities apply a general residential designation which provides for a range of housing types and furthermore, a target mix (e.g. 75% low, 20% medium, and 5% high density units) was not provided in their plans. In these instances, municipality staff were asked to reflect on the types of housing units in development applications over the last three to five years, and suggest the mix which they believed was appropriate to their local context. A footnote is provided on the vacant land inventory table where the estimate of mix was used to determine the acreage of land by low/medium/high density category.

It is also noted that some of the smaller municipalities had insufficient staff resources to regularly monitor their inventory of vacant, designated lands. In the instances where the acreage was not immediately available, staff provided a map of the vacant designated lands so that the land area could be calculated. These municipalities included Oro-Medonte and Penetanguishene.

To determine the unit yield on vacant, designated lands, reference was made to each municipal official plan. The densities stated in the plans were applied to the area of vacant lands to obtain the unit yield. However, densities may not have been defined consistently in some of the official plans, and the description of how the density provisions were interpreted is provided in Item (a), below.

To determine the resulting number of persons able to be accommodated on the vacant, designated lands, the same approach applying persons-per-unit as documented in Section 5 of this report was used.

a. Residential Density Provisions and Interpretation for IGAP

All of the official plans of local municipalities in the study area make reference to density in some way. However, density ranges or targets may not be provided for each housing type (i.e. single/semi-detached, townhouses, apartments) and may not apply to all areas of the municipality (e.g. in a secondary plan area where specific densities are planned). This section of the report describes any interpretation given to the density statements in the official plans towards determining the densities used in the IGAP analysis of vacant residential lands. The densities used for the analysis are shown on **Table 6.3**.

Upper Range Used as the Target

Where a range was provided for the density, then the upper number of the range was identified as the target. The upper figure was taken because it represented the maximum planned development potential on the vacant lands.

Specific Densities took Precedence

Where specific residential density ranges or targets had been determined through a secondary plan or area-specific planning study, these density ranges or targets were used to determine the unit yield on these lands⁹. Where area-specific residential density ranges were not provided, the general residential density ranges or targets as stated in the municipality's official plan were used.

Use of Gross Density and Conversion from Net

Densities were identified as either net or gross units, and a consistent application of density was required for the vacant lands. The vacant land inventory is considered to be a gross estimate of developable lands (i.e. not constrained by provincially-significant environmental features) and therefore gross density figures are used in the analysis. Where a plan quoted net density, this was converted to gross density by multiplying the net number by 50%. This represents that 50% of gross developable lands is attributed to residential lands only and the other 50% is attributed to roads, parks, etc. This 50-50 split is an industry standard approach for regional-scale studies of this type.

In addition to the above interpretations, the following specific interpretations were required for the study area municipalities:

Adjala-Tosorontio

Loretto and Hockley are planned to remain as low-density, residential settlement areas, and single-detached units are restricted to a maximum density of 5 units per hectare. Residential densities are not stated for Everett, Colgan, Lisle, and Rosemont. Although the plan anticipates housing types such as semi-detached and townhouses, these areas are partially serviced, similar to Hockley and Loretto, and therefore the same density figure for Hockley/Loretto has been applied.

Barrie

High density development is directed to the City Centre and Allandale areas. It is assumed that this might effectively limit the amount of high density development in greenfield areas but not restrict it entirely. Since high density is not specifically prohibited in greenfield areas, 150 units per net acre is provided.

Bradford-West Gwillimbury

The official plan indicates that the development of Bond Head will be guided by secondary plans but does not specify residential densities. A review of the general plan and secondary plan

⁹ Within discrete water or sanitary sewer service areas.

policies for Bradford reveal that a common density is applied for low, medium and high density development. It is anticipated that these common densities might also apply to Bond Head.

Clearview

High density development is not planned for Clearview's serviced areas, so zero is quoted. There are no density targets established in the Clearview plan for the partially serviced areas and a traditional lot size of one unit per net acre is assumed.

Essa

There is no planned density for low density uses; however, there is a range of densities provided based on the size of the lot for medium density uses. The medium density uses include townhouse and low-rise apartments, and therefore one-half of the lower end of the medium density range has been assumed for low density uses. High density development is not planned and is therefore shown as zero.

Innisfil

Stroud, Churchill, Gilford, Fennels Corners, and Thornton are planned as low density settlement areas, however, the plan is silent on a density of development. A review of air photography of the area indicates that existing development is at 2.5 units per gross hectare and this has been used. With respect to Lefroy, a review of air photography of the area indicates that existing development is at four units per gross hectare and this has been used. Given that these areas are only partially serviced and not planned for higher densities, then medium and high densities are not provided.

Oro-Medonte

The policies in the official plan indicate that the character of rural settlement areas should remain low density, but the plan is silent on density targets for development. A review of air photography of the area indicates that existing development is at 2.6 units per gross hectare and this has been used.

Penetanguishene

Densities are provided for medium and high density development, but not low density development. The medium density envisioned in the plan includes townhouses, triplexes, and fourplexes. It was assumed that low density development comprising single-detached and semi-detached would likely develop at half the density of these medium-density dwelling types, and therefore half of the medium density target was used as the low density target.

Ramara

Density targets of 12 units per net hectare for low density and 24 units per net hectare for multiple-unit development is planned in serviced villages, and therefore 24 units per net hectare is identified as the density target for both medium and high density development. A density target of 5 units per net hectare is planned in partially-serviced villages, effectively restricting the development to low density.

Severn

The plan provides for low and medium density development in the serviced areas of Washago, West Shore and Coldwater. There are no provisions for high density development and therefore zero is quoted. The policies for residential development outside of the serviced areas provided for a range of lot sizes with a provision that the overall average is at least 0.81 net hectares per unit, effectively restricting development to low density.

Springwater

Elmvale, Midhurst, Snow Valley, Anten Mills, Centre Vespra, Hillsdale, and Minesing are all identified as settlement areas; however, the official plan does not provide any development densities. A review of air photography of these areas indicates that existing development is at 5 units per gross hectare in Elmvale and 3 units per gross hectare in the other areas, and these numbers are used for IGAP. It is noted that it was difficult to determine a density of existing multiple-dwelling development in Midhurst, and no number is provided. Due to development constraints in Orr Lake, the Official Plan does not envision additional development lands, and therefore no development densities are provided.

Tay

For the serviced areas, a range approach as described above for Essa was also identified in the Tay Official Plan for multiple unit development. The medium density uses include townhouse and low-rise apartments and the upper density range for the larger lot sizes is quoted. High density development is not planned and is therefore shown as zero. The plan suggests a range from 0.4 net hectares to greater than 1.0 net hectares of lot area per unit, thereby limiting uses outside of the serviced areas to low density development.

Tiny

There are no residential densities stated for Perkinsfield and Wyevale, which are designated settlement areas in the Tiny Official Plan and the Official Plan directs that determination of lot size will be based on a servicing study. Given that the development in Perkinsfield and Wyevale will be on municipal water and private sewage disposal systems, a traditional one acre lot size has been assumed, and effectively restricts development to low density forms. Staff from Tiny, through further discussion, confirmed that this was appropriate. The policies for residential

development outside of the serviced areas provides for a lot size of 0.80 net hectares per unit, effectively restricting development to low density.

6.4.2 Observations from the Vacant Lands Inventory Table

Table 6.4 shows the results of the vacant lands inventory. The following observations on the vacant lands inventory are made:

- There are 3,106 hectares in the vacant lands inventory;
- Based on area, the mix consists of 87% low, 12% medium, and 2% high density in vacant lands;
- The estimate of planned units is 42,971 units in the vacant lands inventory;
- Based on units, the mix consists of 62% low, 34% medium, and 4% high density mix in vacant lands;
- 117,698 persons could be absorbed in the vacant lands inventory.

The larger shares of the vacant land inventory is within six municipalities: Bradford West-Gwillimbury, Clearview, Collingwood, Oro-Medonte, Tay and Tiny. These communities account for 68% of the vacant land inventory; 72% of the unit potential on vacant designated lands; and 72% of the population potential on vacant designated lands.

Low density residential remains the predominant housing type on the vacant land inventory. There is some recognition of the potential for medium density development (34% of unit potential) on vacant land.

Considering that the projected population increase (2001-2031) for the study area is 275,000 (based on *Places to Grow*, November 2005), the vacant lands could absorb 43% of the projected population growth of the study area, notwithstanding matters such as housing preference, phasing, or servicing constraints.

6.5 Summaries of Population Potential

A summary of the total population potential, by water service and by sewage service area, has been prepared by compiling the information on development inventory, vacant lands, intensification, and in-fill.

Table 6.4

Vacant Land Inventory

Intergovernmental Action Plan for Simcoe, Barrie and Orillia

	Vacant Land Inventory (hectares)					Density Targets (upgh)			Unit Potential on Vacant Designated Lands					PPU's	Pop'n Potential on Vacant Designated Lands				
	Low Density: Single-Detached	Low Density: Semi-Detached	Medium Density: Townhouses / Stacked TH's	High Density: Apartments	Subtotal	Low Density: Singles/Semis	Medium Density: Townhouses / Stacked TH's	High Density: Apartments	Low Density: Single-Detached	Low Density: Semi-Detached	Medium Density: Townhouses / Stacked TH's	High Density: Apartments	Subtotal		Low Density: Single-Detached	Low Density: Semi-Detached	Medium Density: Townhouses / Stacked TH's	High Density: Apartments	Subtotal
16. Township of Tay²																			
* Victoria Harbour / Port McNicoll	498.2	0.0	26.2	0.0	524.4 ha	12.8	37.0	0.0	6,376	0	970	0	7,346	2.9	18,491	0	2,813	0	21,305
Rope	0.0	0.0	0.0	0.0	0.0 ha	1.2	0.0	0.0	0	0	0	0	0	2.9	0	0	0	0	0
Midland Bay Woods	0.0	0.0	0.0	0.0	0.0 ha	1.2	0.0	0.0	0	0	0	0	0	2.9	0	0	0	0	0
Bay Berry	0.0	0.0	0.0	0.0	0.0 ha	1.2	0.0	0.0	0	0	0	0	0	2.9	0	0	0	0	0
* Waubaushene	66.5	0.0	3.5	0.0	70.0 ha	12.8	37.0	0.0	851	0	129	0	980	2.9	2,467	0	375	0	2,842
17. Township of Tiny²																			
* Perkinsfield	20.0	0.0	0.2	0.0	20.2 ha	1.2	0.0	0.0	24	0	0	0	24	2.6	63	0	0	0	63
Bluewater	48.1	0.0	0.5	0.0	48.6 ha	0.6	0.0	0.0	29	0	0	0	29	2.6	75	0	0	0	75
Georgian Bay Estates	16.0	0.0	0.2	0.0	16.2 ha	0.6	0.0	0.0	10	0	0	0	10	2.6	25	0	0	0	25
Georgian Sands	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
LA Place	8.0	0.0	0.1	0.0	8.1 ha	0.6	0.0	0.0	5	0	0	0	5	2.6	13	0	0	0	13
TeePee Point	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
Sand Castle Estates	22.0	0.0	0.2	0.0	22.3 ha	0.6	0.0	0.0	13	0	0	0	13	2.6	34	0	0	0	34
Vanier Woods	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
* Wyevale Central	6.0	0.0	0.1	0.0	6.1 ha	1.2	0.0	0.0	7	0	0	0	7	2.6	19	0	0	0	19
Cook's Lake	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
Georgian Highlands	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
Lefaive	24.0	0.0	0.2	0.0	24.3 ha	0.6	0.0	0.0	14	0	0	0	14	2.6	38	0	0	0	38
Pennorth	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
Rayko	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
Sawlog Bay	16.0	0.0	0.2	0.0	16.2 ha	0.6	0.0	0.0	10	0	0	0	10	2.6	25	0	0	0	25
Thunder Beach	6.0	0.0	0.1	0.0	6.1 ha	0.6	0.0	0.0	4	0	0	0	4	2.6	9	0	0	0	9
Whip-Poor-Will 2	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
Woodland Beach	120.2	0.0	1.2	0.0	121.4 ha	0.6	0.0	0.0	72	0	0	0	72	2.6	188	0	0	0	188
Tiny Cove Estates	0.0	0.0	0.0	0.0	0.0 ha	0.6	0.0	0.0	0	0	0	0	0	2.6	0	0	0	0	0
18. Town of Wasaga Beach																			
* Wasaga Beach	159.3	0.0	8.8	0.0	168.1 ha	13.5	18.5	37.0	2,151	0	163	0	2,313	2	4,301	0	326	0	4,627
TOTALS	2,677.4	12.2	368.3	48.1	3,106.0 hectares				26,335	249	14,685	1,703	42,971 units		73,862	746	38,102	4,988	117,698 persons

Source of data: Municipal planning departments

Notes: Numbers may not sum directly due to rounding.

¹ Unit yield has been adjusted based on site-specific density restrictions.

² Based on municipal staff's suggested mix of low/medium/high density development within a blanket residential designation.

* Denotes a designated settlement area in the County of Simcoe Official Plan

SUBTOTALS BY DESIGNATED SETTLEMENT AREAS (DSA) IN THE COUNTY OF SIMCOE OFFICIAL PLAN

Subtotal by DSA noted by (*), excluding Barrie / Orillia	2,152.7	8.7	359.7	42.6	2,563.6 hectares				22,362	160	14,566	1,425	38,513 units		62,003	481	37,746	4,154	104,384 persons
Subtotal Others	524.8	3.5	8.6	5.6	542.5 hectares				3,973	89	119	278	4,458 units		11,858	266	356	834	13,314 persons

SUBTOTALS BY MUNICIPALITY

1. Township of Adjala-Tosoronto	47.3	0.0	0.0	0.0	47.3	n/a	n/a	n/a	118	0	0	0	118	3.1	366	0	0	0	366
2. City of Barrie	0.0	0.0	0.0	0.0	0.0	n/a	n/a	n/a	0	0	0	0	0	2.7	0	0	0	0	0
3. Town of Bradford West-Gwillimbury	238.3	0.0	44.7	14.9	297.9	n/a	n/a	n/a	2,859	0	894	558	4,311	3.1	8,864	0	2,770	1,731	13,366
4. Township of Clearview	280.8	0.0	70.2	0.0	351.0	n/a	n/a	n/a	4,212	0	3,510	0	7,722	2.8	11,794	0	9,828	0	21,622
5. Town of Collingwood	94.5	0.0	173.2	2.8	270.5	n/a	n/a	n/a	971	0	8,297	279	9,547	2.4	2,330	0	19,913	670	22,913
6. Township of Essa	30.3	8.7	4.3	0.0	43.3	n/a	n/a	n/a	561	160	160	0	881	3	1,682	481	481	0	2,644
7. Town of Innisfil	143.3	0.0	0.4	12.7	156.5	n/a	n/a	n/a	427	0	8	236	670	3.2	1,365	0	24	754	2,144
8. Town of Midland	51.0	0.0	12.1	8.1	71.2	n/a	n/a	n/a	637	0	182	202	1,022	2.8	1,785	0	510	567	2,861
9. Town of New Tecumseth	0.0	0.0	0.0	0.0	0.0	n/a	n/a	n/a	0	0	0	0	0	2.8	0	0	0	0	0
10. City of Orillia	140.1	3.5	5.9	5.6	155.1	n/a	n/a	n/a	3,501	89	119	278	3,987	3	10,504	266	356	834	11,960
11. Township of Oro-Medonte	322.9	0.0	0.0	0.0	322.9	n/a	n/a	n/a	839	0	0	0	839	2.7	2,266	0	0	0	2,266
12. Town of Penlanguishene	64.4	0.0	12.1	4.0	80.5	n/a	n/a	n/a	483	0	181	149	813	2.9	1,401	0	525	432	2,359
13. Township of Ramara	74.1	0.0	3.9	0.0	78.0	n/a	n/a	n/a	445	0	72	0	517	2.5	1,112	0	180	0	1,292
14. Township of Severn	168.0	0.0	0.0	0.0	168.0	n/a	n/a	n/a	1,680	0	0	0	1,680	2.7	4,536	0	0	0	4,536
15. Township of Springwater	12.1	0.0	0.0	0.0	12.1	n/a	n/a	n/a	36	0	0	0	36	3	109	0	0	0	109
16. Township of Tay	564.6	0.0	29.7	0.0	594.3	n/a	n/a	n/a	7,227	0	1,099	0	8,326	2.9	20,958	0	3,189	0	24,147
17. Township of Tiny	286.5	0.0	2.9	0.0	289.4	n/a	n/a	n/a	188	0	0	0	188	2.6	488	0	0	0	488
18. Town of Wasaga Beach	159.3	0.0	8.8	0.0	168.1	n/a	n/a	n/a	2,151	0	163	0	2,313	2	4,301	0	326	0	4,627
TOTALS	2,677.4	12.2	368.3	48.1	3,106.0 hectares				26,335	249	14,685	1,703	42,971 units		73,862	746	38,102	4,988	117,698 persons

6.5.1 Methodology for Summarizing Population Potential

For sewage service areas, the population potential in the development inventory (at all stages of development), vacant lands, and intensification has been compiled. For the water service areas, the population potential in the development inventory (at all stages of development), vacant lands, intensification, and in-fill has been compiled. The inclusion of the units in the "development applications being reviewed" category of the development inventory recognizes that although these in-process applications have yet to be approved, they are within a settlement area boundary which intends that the lands will be built-out for urban development. The inclusion of in-fill in the summary by water service area is a reflection of the approach to quantifying in-fill, which accounted in-fill for within certain areas serviced only by municipal water systems.

Given the shortcomings in the assessment of intensification as noted earlier in this report, there is no definitive population potential number provided in the summaries. In an attempt to refine the intensification numbers, information on building permits within intensification areas was requested from a few partner municipalities by MMAH. However, the information received was not sufficient to identify a realistic number of total intensification units as well as the mix of potential low, medium, and high density intensification units. As a result, four population potential scenarios have been created for the gap analysis by assuming no intensification, and the three individual gross intensification figures (low, medium, high).

6.5.2 Observations from the Summaries of Population Potential

A summary of the results of the summaries of population potential in the water and sewage service areas is provided in *Table 6.5* below. Detailed results by water service area and sewage service area provided in *Table 6.6* and *Table 6.7*, respectively.

	Total Population Potential within Water Serviced Area	Total Population Potential within Sewage Serviced Area	Difference between Water and Sewage Serviced Area
Scenario 1: No intensification	243,692 persons	213,893 persons	29,799 persons
Scenario 2: Low intensification	248,750 persons	218,951 persons	29,799 persons
Scenario 3: Medium intensification	280,859 persons	251,061 persons	29,799 persons
Scenario 4: High intensification	317,440 persons	287,642 persons	29,799 persons

Note: Numbers may not sum due to rounding.

The results of the population potential by water service area indicate that there is a substantial potential in the development inventory, vacant lands, and intensification to absorb growth in the study area.

Table 6.6

Summary of Population Potential by Water Areas

Intergovernmental Action Plan for Simcoe, Barrie and Orillia

	Population Potential by Dev't Status				Pop'n Potential by Intensification*			Pop'n Potential by Infill	Pop'n Potential on Vacant Designated Lands	Scenarios for Gap Analysis by Water Area*				
	Population in Approved Development Applications	Population in Draft Approved Plans of Subdivision	Population in Development Applications Being Reviewed	Subtotal	Low*	Med*	High*			Scenario 1 No Intensification	Scenario 2 Low Intens.*	Scenario 3 Med. Intens.*	Scenario 4 High Intens.*	
	A1	A2	A3	A4=A1+A2+A3	B1	B2	B3			C	D	=A4+C+D	=A4+B1+C+D	=A4+B2+C+D
1. Township of Adjala-Tosorontio														
^ Everett	0	158	1,054	1,212				17	70		1,299	1,299	1,299	1,299
^ Colgan	0	0	0	0				4	31		35	35	35	35
^ Lisle	59	0	0	59				11	53		122	122	122	122
^ Loretto Heights	90	0	0	90				33	140		263	263	263	263
^ Rosemont	0	0	0	0				7	0		7	7	7	7
Weca	0	0	0	0					0		0	0	0	0
^ Hockley	0	0	0	0				7	73		80	80	80	80
2. City of Barrie														
Barrie	9,609	8,208	5,783	23,601	0	14,459	14,459		0		23,601	23,601	38,060	38,060
3. Town of Bradford West-Gwillimbury														
^ Bradford and area	369	0	8,054	8,423	1,626	2,710	5,081	3	10,460		18,886	20,512	21,596	23,967
^ Bond Head	0	363	0	363					2,906		3,268	3,268	3,268	3,268
4. Township of Clearview														
^ New Lowell	0	132	2,990	3,122				40	9,055		12,217	12,217	12,217	12,217
^ Stayner	78	0	11,872	11,950	1,844	6,147	0		9,178		21,129	22,973	27,276	21,129
^ Creemore	62	0	498	560	564	1,881	0		3,388		3,948	4,512	5,829	3,948
McKean Subdivision	0	0	0	0					0		0	0	0	0
Colling-Woodlands Subdivision	0	0	0	0					0		0	0	0	0
Buckingham	0	0	0	0					0		0	0	0	0
5. Town of Collingwood														
^ Collingwood	830	2,311	5,256	8,398	0	0	20,088		22,913		31,310	31,310	31,310	51,398
6. Township of Essa														
^ Angus	1,464	1,884	1,425	4,773	0	0	0		2,644		7,417	7,417	7,417	7,417
^ Thornton-Glen	0	123	51	174				30	0		204	204	204	204
^ Baxter	0	0	600	600				5	0		605	605	605	605
7. Town of Innisfil														
Innisfil Heights	0	0	0	0					0		0	0	0	0
Crossroads	0	0	0	0					0		0	0	0	0
^ Stroud	0	160	0	160				30	214		405	405	405	405
^ Churchill	0	19	38	58				11	168		236	236	236	236
^ Gilford (Golf Haven and Gold Crest)	0	160	0	160				43	32		235	235	235	235
Fennels Corners	0	0	0	0					0		0	0	0	0
Big Bay Point	0	0	0	0					0		0	0	0	0
Shoreline North	0	214	0	214					250		465	465	465	465
Shoreline South	0	58	0	58					366		424	424	424	424
^ Cookstown	0	749	0	749	0	0	0		121		870	870	870	870
^ Alcona / Lakeshore	5,232	5,834	2,442	13,507	0	0	0		992		14,499	14,499	14,499	14,499
8. Town of Midland														
^ Midland	1,355	4,603	84	6,042	0	2,024	4,049		2,861		8,904	8,904	10,928	12,952
9. Town of New Tecumseth														
^ Tottenham	0	6,832	0	6,832	0	0	4,500		0		6,832	6,832	6,832	11,332
^ Alliston / Beeton	764	5,250	2,864	8,879	0	0	5,883		0		8,879	8,879	8,879	14,762
10. City of Orillia														
Orillia	204	6,879	717	7,800	0	6,124	15,311		11,960		19,759	19,759	25,884	35,071
11. Township of Oro-Medonte														
Canterbury	0	0	0	0					0		0	0	0	0
Craighurst	0	0	0	0					0		0	0	0	0
^ Horseshoe Highlands	230	151	1,607	1,987					835		2,822	2,822	2,822	2,822
Maplewood	14	0	0	14					0		14	14	14	14
Robin Crest	76	108	54	238					332		570	570	570	570
^ Sugarbush	38	732	0	770				7	632		1,409	1,409	1,409	1,409
Cedarbrook	0	0	0	0					0		0	0	0	0
Harbourwood	0	0	0	0					0		0	0	0	0
Lake Simcoe Regional Aripport	0	0	0	0					0		0	0	0	0
Medonte Hills	70	0	0	70					0		70	70	70	70
^ Shanty Bay	181	251	0	432					67		499	499	499	499
^ Warminster	0	230	0	230					401		630	630	630	630

Table 6.6

Summary of Population Potential by Water Areas

Intergovernmental Action Plan for Simcoe, Barrie and Orillia

	Population Potential by Dev't Status				Pop'n Potential by Intensification*			Pop'n Potential by Infill	Pop'n Potential on Vacant Designated Lands	Scenarios for Gap Analysis by Water Area*				
	Population in Approved Development Applications	Population in Draft Approved Plans of Subdivision	Population in Development Applications Being Reviewed	Subtotal	Low*	Med*	High*			Scenario 1 No Intensification	Scenario 2 Low Intens.*	Scenario 3 Med. Intens.*	Scenario 4 High Intens.*	
	A1	A2	A3	A4=A1+A2+A3	B1	B2	B3			C	D	=A4+C+D	=A4+B1+C+D	=A4+B2+C+D
12. Town of Penetanguishene														
^ Payette	403	1,467	93	1,963	0	1,775	4,377		2,359	4,322	4,322	6,097	8,699	
^ Lepage	0	0	0	0					0	0	0	0	0	
13. Township of Ramara														
Bayshore Village	270	0	0	270					0	270	270	270	270	
Park Lane	0	0	0	0					0	0	0	0	0	
^ Brechin/Lagoon City	138	113	1,220	1,470	1,023	2,047	0		1,292	2,762	3,785	4,809	2,762	
Davy Drive	23	0	0	23					0	23	23	23	23	
South Ramara	118	0	0	118					0	118	118	118	118	
Val Harbour	55	0	0	55					0	55	55	55	55	
Somerset	8	0	0	8					0	8	8	8	8	
14. Township of Severn														
Severn Estates	0	0	0	0					0	0	0	0	0	
^ Bass Lake Woodlands	0	105	0	105					0	105	105	105	105	
Sandcastle Estates	0	0	0	0					0	0	0	0	0	
^ Washago	0	0	0	0	0	0	0		0	0	0	0	0	
^ Coldwater	46	0	22	68	0	0	0		1,296	1,364	1,364	1,364	1,364	
15. Township of Springwater														
^ Elmvale	0	993	0	993	0	0	0		0	993	993	993	993	
^ Midhurst	60	24	0	84	0	0	0		44	128	128	128	128	
^ Snow Valley	0	171	0	171					0	171	171	171	171	
Del Trend	0	0	0	0					0	0	0	0	0	
^ Minesing	0	78	0	78				19	0	97	97	97	97	
Vespra Downs	0	0	0	0					0	0	0	0	0	
^ Anten Mills	69	0	0	69				6	40	115	115	115	115	
^ Hillsdale	0	0	1,089	1,089				22	25	1,136	1,136	1,136	1,136	
16. Township of Tay														
^ Victoria Harbour / Port McNicoll	363	1,438	908	2,709	0	0	0		21,305	24,013	24,013	24,013	24,013	
Rope	0	0	0	0					0	0	0	0	0	
Midland Bay Woods	0	0	0	0					0	0	0	0	0	
Bay Berry	0	0	0	0					0	0	0	0	0	
^ Waubaushene	0	0	0	0					2,842	2,842	2,842	2,842	2,842	
17. Township of Tiny														
^ Perkinsfield	36	49	0	86				31	63	179	179	179	179	
Bluewater	369	0	0	369					75	444	444	444	444	
Georgian Bay Estates	346	0	0	346					25	371	371	371	371	
Georgian Sands	801	0	0	801					0	801	801	801	801	
LA Place	122	39	0	161					13	174	174	174	174	
TeePee Point	18	0	0	18					0	18	18	18	18	
Sand Castle Estates	164	0	0	164					34	198	198	198	198	
Vanier Woods	161	0	0	161					0	161	161	161	161	
^ Wyevale Central	177	39	52	268				18	19	305	305	305	305	
Cook's Lake	34	0	0	34					0	34	34	34	34	
Georgian Highlands	117	5	0	122					0	122	122	122	122	
Lefaive	47	0	0	47					38	84	84	84	84	
Pennorth	18	0	0	18					0	18	18	18	18	
Rayko	49	0	0	49					0	49	49	49	49	
Sawlog Bay	99	0	0	99					25	124	124	124	124	
Thunder Beach	52	0	0	52					9	61	61	61	61	
Whip-Poor-Will 2	36	0	0	36					0	36	36	36	36	
Woodland Beach	57	0	0	57					188	245	245	245	245	
Tiny Cove Estates	117	0	0	117					0	117	117	117	117	
18. Town of Wasaga Beach														
^ Wasaga Beach	1,542	1,426	2,124	5,092	0	0	0		4,627	9,719	9,719	9,719	9,719	
TOTALS	26,638	51,357	50,897	128,891 persons	5,058*	37,168*	73,748* persons	343 persons	114,458 persons	243,692*	248,750*	280,859*	317,440* persons	

Table 6.6

Summary of Population Potential by Water Areas

Intergovernmental Action Plan for Simcoe, Barrie and Orillia

	Population Potential by Dev't Status				Pop'n Potential by Intensification*			Pop'n Potential by Infill	Pop'n Potential on Vacant Designated Lands	Scenarios for Gap Analysis by Water Area*			
	Population in Approved Development Applications	Population in Draft Approved Plans of Subdivision	Population in Development Applications Being Reviewed	Subtotal	Low*	Med*	High*			Scenario 1 No Intensification	Scenario 2 Low Intens.*	Scenario 3 Med. Intens.*	Scenario 4 High Intens.*
	A1	A2	A3	A4=A1+A2+A3	B1	B2	B3			C	D	=A4+C+D	=A4+B1+C+D
SUBTOTALS BY MUNICIPALITY													
1. Township of Adjala-Tosorontio	149	158	1,054	1,361	0	0	0	78	366	1,805	1,805	1,805	1,805
2. City of Barrie	9,609	8,208	5,783	23,601	0	14,459	14,459	0	0	23,601	23,601	38,060	38,060
3. Town of Bradford West-Gwillimbury	369	363	8,054	8,785	1,626	2,710	5,081	3	13,366	22,154	23,780	24,864	27,235
4. Township of Clearview	140	132	15,361	15,632	2,408	8,028	0	40	21,622	37,294	39,703	45,322	37,294
5. Town of Collingwood	830	2,311	5,256	8,398	0	0	20,088	0	22,913	31,310	31,310	31,310	51,398
6. Township of Essa	1,464	2,007	2,076	5,547	0	0	0	35	2,644	8,225	8,225	8,225	8,225
7. Town of Innisfil	5,232	7,194	2,480	14,906	0	0	0	84	2,144	17,133	17,133	17,133	17,133
8. Town of Midland	1,355	4,603	84	6,042	0	2,024	4,049	0	2,861	8,904	8,904	10,928	12,952
9. Town of New Tecumseth	764	12,082	2,864	15,711	0	0	10,383	0	0	15,711	15,711	15,711	26,094
10. City of Orillia	204	6,879	717	7,800	0	6,124	15,311	0	11,960	19,759	19,759	25,884	35,071
11. Township of Oro-Medonte	608	1,472	1,661	3,740	0	0	0	7	2,266	6,013	6,013	6,013	6,013
12. Town of Penetanguishene	403	1,467	93	1,963	0	1,775	4,377	0	2,359	4,322	4,322	6,097	8,699
13. Township of Ramara	610	113	1,220	1,943	1,023	2,047	0	0	1,292	3,234	4,258	5,281	3,234
14. Township of Severn	46	105	22	173	0	0	0	0	1,296	1,469	1,469	1,469	1,469
15. Township of Springwater	129	1,266	1,089	2,484	0	0	0	47	109	2,640	2,640	2,640	2,640
16. Township of Tay	363	1,438	908	2,709	0	0	0	0	24,147	26,855	26,855	26,855	26,855
17. Township of Tiny	2,821	133	52	3,006	0	0	0	49	488	3,542	3,542	3,542	3,542
18. Town of Wasaga Beach	1,542	1,426	2,124	5,092	0	0	0	0	4,627	9,719	9,719	9,719	9,719
TOTALS	26,638	51,357	50,897	128,891 persons	5,058*	37,168*	73,748* persons	343 persons	114,458 persons	243,692*	248,750*	280,859*	317,440* persons

Notes: Numbers may not sum due to rounding of source data.
 *Gross estimate of intensification should be refined through additional study. Refer to Section 6.2.1 of the report.
 ^Denotes a designated settlement area in the County of Simcoe Official Plan

Table 6.7

Summary of Population Potential by Municipal Sanitary Sewage Service Areas

Intergovernmental Action Plan for Simcoe, Barrie and Orillia

	Population Potential by Dev't Status				Pop'n Potential by Intensification*			Pop'n Potential on Vacant Designated Lands	Scenarios for Gap Analysis by Municipal Sanitary Sewage Service Area*				
	Population in Approved Development Applications	Population in Draft Approved Plans of Subdivision	Population in Development Applications Being Reviewed	Subtotal	Low*	Med*	High*		Scenario 1 No Intensification	Scenario 2 Low Intens.*	Scenario 3 Med. Intens.*	Scenario 4 High Intens.*	
	A1	A2	A3	A4=A1+A2+A3	B1	B2	B3		C	D1=A4+C	D1=A4+B1+C	D1=A4+B2+C	D1=A4+B2+C
1. Township of Adjala-Tosorontio													
No municipal wastewater services	0	0	0	0	0	0	0	0	0	0	0	0	0
2. City of Barrie													
Barrie	9,609	8,208	5,783	23,601	0	14,459	14,459	0	23,601	23,601	38,060	38,060	
3. Town of Bradford West-Gwillimbury													
^ Bradford and area	369	0	8,054	8,423	1,626	2,710	5,081	10,460	18,883	20,509	21,592	23,964	
^ Bond Head	0	363	0	363				2,906	3,268	3,268	3,268	3,268	
4. Township of Clearview													
^ Stayner	78	0	11,872	11,950	1,844	6,147	0	9,178	21,129	22,973	27,276	21,129	
^ Creemore	62	0	498	560	564	1,881	0	3,388	3,948	4,512	5,829	3,948	
5. Town of Collingwood													
^ Collingwood	830	2,311	5,256	8,398	0	0	20,088	22,913	31,310	31,310	31,310	51,398	
6. Township of Essa													
^ Angus	1,464	1,884	1,425	4,773	0	0	0	2,644	7,417	7,417	7,417	7,417	
7. Town of Innisfil													
Crossroads	0	0	0	0				0	0	0	0	0	
^ Cookstown	0	749	0	749	0	0	0	121	870	870	870	870	
Shoreline North	0	214	378	592				250	842	842	842	842	
Shoreline South	0	58	10	67				366	433	433	433	433	
^ Alcona / Lakeshore	5,232	5,834	2,442	13,507	0	0	0	992	14,499	14,499	14,499	14,499	
8. Town of Midland													
^ Midland	1,355	4,603	84	6,042	0	2,024	4,049	2,861	8,904	8,904	10,928	12,952	
9. Town of New Tecumseth													
^ Tottenham	0	6,832	0	6,832	0	0	4,500	0	6,832	6,832	6,832	11,332	
^ Alliston / Beeton	764	5,250	2,864	8,879	0	0	5,883	0	8,879	8,879	8,879	14,762	
10. City of Orillia													
Orillia	2,879	4,204	717	7,800	0	6,124	15,311	11,960	19,759	19,759	25,884	35,071	
11. Township of Oro-Medonte													
No municipal wastewater services	0	0	0	0				0	0	0	0	0	
12. Town of Penetanguishene													
^ Main Street	249	1,467	46	1,763	0	1,775	4,377	2,359	4,122	4,122	5,897	8,499	
^ Fox Street	128	0	0	128	0	0	0	0	128	128	128	128	
13. Township of Ramara													
Bayshore Village	270	0	0	270	0	0	0	0	270	270	270	270	
^ Brechin/Lagoon City	200	0	1,220	1,420	1,023	2,047	0	1,292	2,712	3,735	4,759	2,712	
14. Township of Severn													
^ Washago	0	0	0	0	0	0	0	0	0	0	0	0	
^ Coldwater	46	0	22	68	0	0	0	1,296	1,364	1,364	1,364	1,364	
15. Township of Springwater													
^ Elmvale	0	993	0	993	0	0	0	0	993	993	993	993	
16. Township of Tay													
^ Victoria Harbour / Port McNicoll	363	1,438	908	2,709	0	0	0	21,305	24,013	24,013	24,013	24,013	

Table 6.7

Summary of Population Potential by Municipal Sanitary Sewage Service Areas

Intergovernmental Action Plan for Simcoe, Barrie and Orillia

	Population Potential by Dev't Status				Pop'n Potential by Intensification*			Pop'n Potential on Vacant Designated Lands	Scenarios for Gap Analysis by Municipal Sanitary Sewage Service Area*				
	Population in Approved Development Applications	Population in Draft Approved Plans of Subdivision	Population in Development Applications Being Reviewed	Subtotal	Low*	Med*	High*		Scenario 1 No Intensification	Scenario 2 Low Intens.*	Scenario 3 Med. Intens.*	Scenario 4 High Intens.*	
	A1	A2	A3	A4=A1+A2+A3	B1	B2	B3		C	D1=A4+C	D1=A4+B1+C	D1=A4+B2+C	D1=A4+B2+C
17. Township of Tiny													
No municipal wastewater services	0	0	0	0				0	0	0	0	0	0
18. Town of Wasaga Beach													
^ Wasaga Beach	1,542	1,426	2,124	5,092	0	0	0	4,627	9,719	9,719	9,719	9,719	9,719
TOTALS	25,441	45,834	43,702	114,977 persons	5,058*	37,168*	73,748* persons	98,916 persons	213,893	218,951*	251,061*	287,642* persons	
SUBTOTALS BY MUNICIPALITY													
1. Township of Adjala-Tosorontio	0	0	0	0	0	0	0	0	0	0	0	0	0
2. City of Barrie	9,609	8,208	5,783	23,601	0	14,459	14,459	0	23,601	23,601	38,060	38,060	38,060
3. Town of Bradford West-Gwillimbury	369	363	8,054	8,785	1,626	2,710	5,081	13,366	22,151	23,777	24,861	27,232	27,232
4. Township of Clearview	140	0	12,370	12,510	2,408	8,028	0	12,566	25,077	27,485	33,105	25,077	25,077
5. Town of Collingwood	830	2,311	5,256	8,398	0	0	20,088	22,913	31,310	31,310	31,310	51,398	51,398
6. Township of Essa	1,464	1,884	1,425	4,773	0	0	0	2,644	7,417	7,417	7,417	7,417	7,417
7. Town of Innisfil	5,232	6,854	2,829	14,915	0	0	0	1,729	16,644	16,644	16,644	16,644	16,644
8. Town of Midland	1,355	4,603	84	6,042	0	2,024	4,049	2,861	8,904	8,904	10,928	12,952	12,952
9. Town of New Tecumseth	764	12,082	2,864	15,711	0	0	10,383	0	15,711	15,711	15,711	26,094	26,094
10. City of Orillia	2,879	4,204	717	7,800	0	6,124	15,311	11,960	19,759	19,759	25,884	35,071	35,071
11. Township of Oro-Medonte	0	0	0	0	0	0	0	0	0	0	0	0	0
12. Town of Penetanguishene	377	1,467	46	1,891	0	1,775	4,377	2,359	4,250	4,250	6,024	8,627	8,627
13. Township of Ramara	470	0	1,220	1,690	1,023	2,047	0	1,292	2,982	4,005	5,029	2,982	2,982
14. Township of Severn	46	0	22	68	0	0	0	1,296	1,364	1,364	1,364	1,364	1,364
15. Township of Springwater	0	993	0	993	0	0	0	0	993	993	993	993	993
16. Township of Tay	363	1,438	908	2,709	0	0	0	21,305	24,013	24,013	24,013	24,013	24,013
17. Township of Tiny	0	0	0	0	0	0	0	0	0	0	0	0	0
18. Town of Wasaga Beach	1,542	1,426	2,124	5,092	0	0	0	4,627	9,719	9,719	9,719	9,719	9,719
TOTALS	25,441	45,834	43,702	114,977 persons	5,058*	37,168*	73,748* persons	98,916 persons	213,893	218,951*	251,061*	287,642* persons	

Notes: Numbers may not sum due to rounding of source data.

*Gross estimate of intensification should be refined through additional study. Refer to Section 6.2.1 of the report.

^Denotes a designated settlement area in the County of Simcoe Official Plan

When compared side-by-side, the difference between the total population potential in the water service area and sewage service area is approximately 30,000 persons, regardless of intensification scenario. This difference represents the volume of development in the study area which is approved/planned but not expected to be built-out on full municipal services.

Considering that the projected population increase (2001-2031) for the study area is 275,000 (based on *Places to Grow*, November 2005), the summary population potential represents 78% to 105% of the projected population growth of the study area within sewage serviced areas. In water serviced areas, the summary population potential represents 89% to 115% of the projected population growth. This is notwithstanding matters such as housing preference, phasing, servicing constraints, or the shortcomings of the intensification analysis.

7. PUBLIC SERVICE FACILITIES

7.1 Introduction

The Provincial Policy Statement (PPS) defines Public Service Facilities as: land, buildings and structures for the provision of programs and services provided or subsidized by a government or other body such as social assistance, recreation, police and fire protection, health and educational programs and cultural services but do not include infrastructure.

Section 1.6.1 of the PPS establishes that Public Service Facilities shall be:

- Provided in a coordinated, efficient and cost effective manner to accommodate projected needs.
- Integrated with planning for growth so that these are available to meet current and projected needs.

Sections 1.6.2 and 1.6.3 states that Public Service Facilities should be:

- Optimized, wherever feasible, before consideration is given to developing new facilities.
- Strategically located to support the effective and efficient delivery of emergency management services.
- Co-located to promote cost-effectiveness and facilitate service integration.

7.2 Scope of Analysis

For the Intergovernmental Action Plan for Simcoe, Barrie and Orillia, the focus of investigation has been narrowed to the following Public Service Facilities:

- Health facilities with an emphasis on hospitals.
- Educational facilities with an emphasis on elementary and secondary schools.
- Recreational and Cultural facilities of a larger scale and regional significance.

Regionally significant has been defined as facilities intended to serve users from across the municipality and from outside the municipality. Many municipalities categorize their facilities and have noted those of regional significance. The clustering of facilities often gives them regional significance.

7.3 Data Sources

For the Intergovernmental Action Plan for Simcoe, Barrie and Orillia, information has been collected regarding:

- Current facilities by location
- Current facility surpluses/deficits, if any, and projected facility needs by location
- Growth and other assumptions underlying projections

- Capital cost projections associated with facility needs, if prepared.

Information on health facilities was drawn from hospital web sites and provided by Simcoe County Hospital Alliance. Information on educational facilities was provided by Simcoe County District School Board and the Simcoe Muskoka Catholic District School Board. Recreational and cultural facilities information came from a number of municipalities and municipal web sites.

It should be noted that the 'data sets' available for this review vary greatly both in level of analysis and range of information presented.

For this reason, the following narrative has been prepared to describe current facilities and the magnitude of planned capital expenditures to meet approved growth.

Figure 7.1 presents a visual overview of these facilities.

7.4 Health Care Facilities

7.4.1 Assumptions Underlying Projections

The Simcoe County Hospital Alliance represents all hospitals serving the residents of Simcoe/Barrie/Orillia. The Alliance advises the County of Simcoe on the allocation of capital funding for hospital facilities meeting acute care needs. 2005 is Year 4 of a 5-year allocation period and the following information was provided by the Alliance to the County of Simcoe in support of the current allocation request.

7.4.2 Hospitals

Hospital facilities include:

- Southlake Regional Health Centre, Newmarket
- Stevenson Memorial Hospital, Alliston
- Royal Victoria Hospital, Barrie
- Soldiers Memorial Hospital, Orillia
- General & Marine Hospital, Collingwood
- North Simcoe Hospital Alliance - Penetanguishene General Hospital & Huronia District Hospital, Midland

7.4.3 Capital Projects

Southlake Regional Health Centre serves a rapidly growing population that includes residents in South Simcoe. A 5-year, \$180 million redevelopment plan will be completed in 2006 and will result in the expansion and modernization of all of its services and an increase in beds to 421. In 2007, a new \$6 million regional cancer centre will open.



Intergovernmental Action Plan for Simcoe, Barrie and Orillia
Figure 7.1. Public Service Facilities

LEGEND

- IGAP Study Boundary²
- Area Municipalities²
- Provincial Highways¹
- County Roads¹
- Ponds and Lakes¹
- Hospital
- Public Secondary School⁹
- Separate Secondary School¹⁰
- Georgian College¹²
- Provincial Parks¹
- Conservation Area Park¹
- Trans Canada Trail¹¹
- Bruce Trail¹
- Ganaraska Trail¹



Projection: UTM zone 17N NAD83
 Data Sources: 1. Ontario Ministry of Natural Resources
 2. Ontario Ministry of Municipal Affairs and Housing
 7. Simcoe County and/or Local Municipalities
 8. Niagara Escarpment Commission
 9. Simcoe County District School Board
 10. Simcoe Muskoka Catholic District School Board
 11. Trans Canada Trail Foundation 12. Georgian College of Applied Arts and Technology

Elementary schools not identified - too many
 Municipal level facilities not identified - too many

Created by: PJK
 Checked by: RB



**Ainley Group
 Clara Consulting
 Bourrie & Associates**

Last Modified March 3, 2006

Stevenson Memorial Hospital is a 43-bed facility serving South Simcoe. Planned future capital projects include \$100 million dollars for a new and larger hospital.

Royal Victoria Hospital opened its new 297-bed facility serving Barrie and area in 1997. At an estimated cost of \$250 million, the hospital's planned capital projects includes expansions to the Emergency Department, Diagnostic Imaging, additional inpatient beds and construction of the 73,000 sq. ft. cancer centre, featuring 3 radiation therapy suites.

Soldiers Memorial Hospital is a 176-bed facility serving Orillia and area. A major capital expansion of the hospital is currently under construction and will make 60 more beds available in 2006. The \$82 million project will increase services such as emergency care, laboratory, diagnostic imaging and pharmacy.

General & Marine Hospital is a 72-bed facility serving Collingwood and surrounding municipalities in Simcoe and Grey Counties. Planned capital projects include a \$25 million expansion.

North Simcoe Hospital Alliance has recently completed an expansion to accommodate a dialysis unit and an obstetrics unit. Planned capital projects include a \$15 million expansion.

7.5 Educational Facilities

7.5.1 Enrolment Projections

In 2003, the Simcoe County District School Board (SCDSB) and the Simcoe Muskoka Catholic District School Board (SMCDSB) jointly prepared an educational development charges background study. The analysis of educational facilities needs in the Simcoe/Barrie/Orillia for the 15 year period of 2003 to 2018 relied upon the following municipal data:

- Historical housing construction activity.
- Residential units in the development process.
- Official Plans, secondary plans, severances and growth management strategies.
- Servicing capacity.
- Economic and growth forecasts
- County projections for population growth, as prepared by Hemson Consulting, were used as a reference base by C. N Watson.

The C.N. Watson forecast of 65,912 net new residential units was generated, of which ;

- 73% or 48,115 would be low or medium density units
- 60% of these units would be constructed in Barrie, New Tecumseth, Innisfil and Bradford West Gwillimbury.

(C.N. Watson and Associates Ltd., *Planning for Growth: Simcoe County District School Board & Simcoe Muskoka District School Board Educational Development Charges Background Study*, August 2003).

Facility needs were projected using:

- Historical enrolment patterns.
- Analysis of demographic characteristics of projected population resulting from new residential units.

Enrolment projections for the existing communities showed that on a county-wide basis school enrolment would decrease by the end of the study period. Only secondary school enrolment showed increases during the study period.

Existing Residential Enrolment	2003/04	20007/08	2012/13	2017/18
Elementary				
SCDSB	35,506	34,388	32,325	29,316
SMCDSB	13,389	13,338	13,256	12,022
Secondary				
SCDSB	17,332	19,593	18,595	17,884
SMCDSB	6,173	6,091	5,685	5,926

Pupil yields for the expected new residential development will create additional enrolment.

New Development Enrolment	2003/04	20007/08	2012/13	2017/18
Elementary				
SCDSB		3,905	4,672	9,890
SMCDSB		967	1,919	3,972
Secondary				
SCDSB		1,358	3,881	6,868
SMCDSB		531	1,649	2,913

It was concluded that by 2017/18:

- Simcoe County District School Board would experience a net increase of 3,869 pupils at the elementary level and 7,609 pupils at the secondary level.
- Simcoe Muskoka Catholic District School Board would experience a net increase of 2,464 pupils at the elementary level and 2,391 pupils at the secondary level.

7.5.2 Elementary Schools

7.5.2.1 SCDSB Facilities

There are 92 elementary schools in Simcoe/Barrie/Orillia, evenly split between what is characterized as rural and urban schools. In total, enrolment at these schools in 2004 exceeded the Ministry standard for student capacity by 402 pupils with slightly more rural students being accommodated in portable classrooms.

Based on pupil projections and the current Ministry facility standard, it is expected that by 2010, there will be a facility surplus of 771 with more space available in the rural schools.

Despite the overall surplus of space, it is anticipated that growth and development will create facility deficits, particularly, in:

	Current Pupil Capacity as per Ministry Standard	2009/10	
		Projected Pupil Enrolment	Projected Facility Deficit
South Barrie	4,808	6,679	1,871
New Tecumseth/Adjala- Tosorontio/Essa	3,854	4,259	405

By 2017, new elementary schools are proposed for:

- North Simcoe 3 schools
- Orillia 1 school
- North Barrie 2 schools
- South Barrie 6 schools
- South Simcoe 7 schools

7.5.2.2 SMCDSB Facilities

There are 42 elementary schools in Simcoe/Barrie/Orillia. In total, enrolment at these schools in 2004 exceeded the Ministry standard for these facilities by 877 pupils with students being accommodated in portable classrooms.

By 2017, 3 new elementary schools are proposed for South Barrie (2) and New Tecumseth (1). Beyond 2017, additional new schools (7) and expansions of existing schools (3) are contemplated, largely in South Simcoe.

7.5.3 Secondary Schools

7.5.3.1 SCDSB Facilities

There are 16 secondary schools in the County. In total, enrolment at these schools in 2004 exceeded the Ministry standard for these facilities by 1,524 pupils. Portable classrooms are in use.

Based on pupil projections and the current Ministry facility standard, it is expected that by 2010, the facility deficit will have been reduced to 1,349 but it must be noted that several schools will remain well beyond their capacity – Bear Creek, East View, Elmvale, Innisdale and Orillia – with portable classrooms in use.

7.5.3.2 SMCDSCB Facilities

There are 9 secondary schools in the County. In total, enrolment at these schools in 2004 exceeded the Ministry standard for these facilities by 773 pupils. Portable classrooms are in use.

Substantial expansions to existing schools are underway with 1,156 new pupil spaces being created in 5 secondary schools. Beyond 2017, 2 new schools are contemplated.

7.5.4 Capital Cost Implications

For the purposes of education development charge calculations, C. N Watson determined that the total net education land costs for the 65,912 net new units was \$46,240,470 (SCDSC) and \$14,275,580 (SMCDSC).

7.5.5 Post-Secondary Education

Georgian College, a medium sized college, offers a range of post-secondary courses at its main campus locations in Barrie and Orillia as well as its regional locations in Collingwood and Midland.

8.0 ECONOMIC BASE ANALYSIS

8.1 Introduction

The Province's policy-led planning system attempts to recognize the complex interrelationships and inherent tensions between economic, environmental and social factors. This high level economic base analysis of the study area is intended to:

- Identify economic trends and activity in the study area, including the relative importance of specific sectors;
- Take into consideration municipal economic development strategies as they relate to future land needs for commercial, industrial, and agricultural land, and the effect of transportation and servicing on economic growth within targeted sectors;
- Identify key issues for the IGAP from an economic development perspective.

8.2 Overview of Economic Base

Significant growth has occurred in the study area over the past 15 years, with much of this growth occurring in the southern portion. In 1996, the population level of the study area was 329,900; this may be compared to a 2001 population level of around 377,100, representing a per annum increase of approximately 3%. Around 28% of the study area population resided in Barrie in 2001, and another 28% in the five municipalities which comprise south Simcoe. Collingwood and Wasaga Beach collectively accounted for 8% of the population; Orillia also accounted for 8%.

The *Places to Grow Act* provides the legal framework for growth planning in Ontario. The Places to Grow Proposed Growth Plan for the Greater Golden Horseshoe (PGP) focuses on strategic decision making. The vision outlined in the PGP is one of compact settlement and development patterns that are capable of providing diverse opportunities to work, live and participate in community life. Under the plan's policies a large portion of the new growth will be accommodated in existing urban areas.

The PGP has identified downtown Barrie as an "Urban Growth Centre (UGC)", a regional focal point that will accommodate a significant share of population and employment growth. UGCs are primarily the downtown cores of existing urban centres where cultural facilities, public institutions, major services and transit hubs should be located.

The PGP combined population, household, and employment forecasts for Simcoe County, Barrie and Orillia for 2031 is 667,000 persons, 260,000 households, and 254,000 jobs, respectively.

The population and employment forecasts prepared for the study area in 2004 by Hemson (Hemson Consulting, *Simcoe Final Forecast Update Study*, 2004) represent a future situation that would likely occur if recent growth patterns continued through the forecast period. In preparing these forecasts, Hemson distributed growth to municipalities based upon their demonstrated shares of the study area population growth over the past 10 years. Planned growth or other measures of residential capacity such as designated supply or servicing were not considered in these forecasts. The forecast distribution by population was based on the average share of housing permits in the 2001-2006 period. Using this approach, Hemson forecasted that the study area could reach a population level of over 618,000 by 2026, which is a 64% growth over the period, or around 2.6% population growth per annum.

The 2001 and forecasted 2026 population levels by community within the study area are noted in **Table 8.1**. The City of Barrie accounts for the largest portion of population and its share is expected to increase by about nine percentage points in 2026. As such, Barrie's role as the principal growth centre in the study area is expected to become more dominant in the future.

Table 8.1: Study Area Population and Capture Rates

Municipality	2001		2026		Per Annum % Growth
	Population	% capture	Population	% capture	
Adjala-Tosorontio	10,082	2.7%	15,300	2.5%	2.1%
New Tecumseth	26,141	6.9%	38,600	6.2%	1.9%
Bradford-West Gwillimbury	22,228	5.9%	34,000	5.5%	2.1%
Innisfil	28,666	7.6%	45,100	7.3%	2.3%
Essa	16,808	4.5%	21,200	3.4%	1.0%
Clearview	13,796	3.7%	18,400	3.0%	1.3%
Collingwood	16,039	4.3%	22,800	3.7%	1.7%
Wasaga Beach	12,419	3.3%	28,900	4.7%	5.3%
Springwater	16,104	4.3%	22,600	3.7%	1.6%
Barrie*	103,710	27.5%	226,300	36.6%	4.7%
Oro-Medonte	18,315	4.9%	26,700	4.3%	1.8%
Orillia	29,121	7.7%	35,600	5.8%	0.9%
Ramara	8,615	2.3%	12,600	2.0%	1.9%
Rama First Nation	597	0.2%	600	0.1%	0.0%
Severn	11,135	3.0%	16,100	2.6%	1.8%
Tay	9,162	2.4%	10,900	1.8%	0.8%
Tiny	9,035	2.4%	13,500	2.2%	2.0%
Midland	16,214	4.3%	17,600	2.8%	0.3%
Penetanguishene	8,316	2.2%	10,900	1.8%	1.2%
Christian Island	547	0.1%	500	0.1%	-0.3%
Total	377,050		618,200		2.6%

Source: Hemson Consulting 2004; EDP Consulting 2005

* assumes unconstrained land development

Hemson applied age specific participation rates against population forecasts to provide estimates of future labour force. Labour force forecasts pertain to the expected size of the labour force and are not representative of the actual number of jobs. They do not take into account labour outflows and inflows, or land supply, servicing, land use designations/ zoning, or the market demand for employment lands in the study area. Therefore the level and distribution of growth could change depending on such factors.

Based on the Hemson forecasts, the labour force of study area could increase from around 158,200 in 2001 to 268,700 in 2026, that is by roughly 70%, or a per annum growth of around 2.8%, as shown in **Table 8.2**. The labour force of Barrie is forecasted to increase significantly: 5% per annum, and eleven percentage points in its relative portion of county labour force. Barrie accounted for 33% of the study area's labour force in 2001 and is forecasted to account for 44% in 2026, thus reinforcing its role as a major service centre in the study area. In contrast, the

relative importance of other communities as centres within the study area, such as Orillia, is expected to decrease slightly.

Table 8.2: Study Area Labour Force and Capture Rates

Municipality	2001		2026		Per Annum % Growth
	Labour Force	% Capture	Labour Force	% Capture	
Adjala-Tosorontio	1,304	0.8%	2,000	0.7%	2.1%
New Tecumseth	17,254	10.9%	26,400	9.8%	2.1%
Bradford-West Gwillimbury	6,733	4.3%	10,700	4.0%	2.4%
Innisfil	5,914	3.7%	9,600	3.6%	2.5%
Essa	6,807	4.3%	8,900	3.3%	1.2%
Clearview	3,768	2.4%	5,200	1.9%	1.5%
Collingwood	10,841	6.9%	15,900	5.9%	1.9%
Wasaga Beach	2,318	1.5%	5,600	2.1%	5.7%
Springwater	4,389	2.8%	6,400	2.4%	1.8%
Barrie	52,660	33.3%	118,700	44.2%	5.0%
Oro-Medonte	4,197	2.7%	6,300	2.3%	2.0%
Orillia	16,100	10.2%	20,400	7.6%	1.1%
Ramara	1,908	1.2%	2,900	1.1%	2.1%
Rama First Nation	2,987	1.9%	3,100	1.2%	0.2%
Severn	3,448	2.2%	5,200	1.9%	2.0%
Tay	1,422	0.9%	1,800	0.7%	1.1%
Tiny	1,260	0.8%	1,900	0.7%	2.0%
Midland	10,346	6.5%	11,600	4.3%	0.5%
Penetanguishene	4,443	2.8%	6,000	2.2%	1.4%
Christian Island	110	0.1%	100	0.0%	-0.4%
Total	158,209		268,700		2.8%

Source: Hemson Consulting 2004; EDP Consulting 2005

The relative importance of various sectors for the study area labour force is shown in **Table 8.3**. Overall, manufacturing is the most important sector in terms of labour force employment, with nearly 35,000 or 18% of the labour force being employed in this sector. Retail trade also employs a large portion of the labour force (around 12%).

Table 8.3: Labour Force Distribution by Sector

NAIC	Sector	Number	%
11	Agriculture, forestry, fishing and hunting	4,375	2.2%
21	Mining and oil and gas extraction	305	0.2%
22	Utilities	1,225	0.6%
23	Construction	15,430	7.9%
31-33	Manufacturing	34,730	17.7%
41	Wholesale trade	9,170	4.7%
44-45	Retail trade	24,250	12.4%
48-49	Transportation and warehousing	9,710	4.9%
51	Information and cultural industries	3,695	1.9%
52	Finance and insurance	4,955	2.5%
53	Real estate and rental and leasing	3,420	1.7%
54	Professional, scientific and technical services	8,490	4.3%
55	Management of companies and enterprises	65	0.0%
56	Administrative and support, waste management and remediation	8,305	4.2%
61	Educational services	10,330	5.3%
62	Health care and social assistance	17,820	9.1%
71	Arts, entertainment and recreation	6,335	3.2%
72	Accommodation and food services	13,390	6.8%
81	Other services (except public administration)	8,915	4.5%
91	Public administration	11,290	5.8%
	Total	196,205	100%

Source: Statistics Canada, EDP Consulting

The level of concentration of employment in specific sectors can be determined through comparing the relative portion of employment by sector, known as the location quotient (LQ), to the provincial average. The provincial average for each sector is represented with a location quotient of 1. A location quotient that is higher than 1 indicates a sector concentration higher than the provincial average. A location quotient of less than 1 indicates that the employment concentration in the sector is lower than the provincial average. The greater the variance from the provincial average, the larger the sector concentration or lack of concentration.

The study area labour force location quotients by sector are provided in *Table 8.4*.

The labour force location quotient is generally average for about half of the sectors. It is below the provincial average for about one-third of the sectors (particularly those related to the professional, management and financial services). A higher level of concentration than the provincial average is found in the arts, entertainment and recreation sector (location quotient of 1.6.) and the construction sector (location quotient of 1.4).

Table 8.4: Study Area Labour Force Location Quotient by Sector

NAIC	Sector	Location Quotient
11	Agriculture, forestry, fishing and hunting	1.1
21	Mining and oil and gas extraction	0.4
22	Utilities	0.8
23	Construction	1.4
31-33	Manufacturing	1.1
41	Wholesale trade	1.0
44-45	Retail trade	1.1
48-49	Transportation and warehousing	1.1
51	Information and cultural industries	0.7
52	Finance and insurance	0.5
53	Real estate and rental and leasing	1.0
54	Professional, scientific and technical services	0.6
55	Management of companies and enterprises	0.3
56	Administrative and support, waste management and remediation services	1.0
61	Educational services	0.8
62	Health care and social assistance	1.0
71	Arts, entertainment and recreation	1.6
72	Accommodation and food services	1.1
81	Other services (except public administration)	1.0
91	Public administration	1.1

Source: Statistics Canada, EDP Consulting

The significance and concentration by sector varies significantly throughout the study area. From an economic development perspective, sectors which are export oriented are particularly important as they bring new money into communities rather than a recirculation of money already in the local economy. The three sectors that serve non-local markets: agriculture, tourism-related sectors and manufacturing are reviewed later in this subsection.

The study area has a high live/work ratio with around 83% of its labour force working within the Simcoe, Barrie, Orillia area, as shown in *Table 8.5*.

Table 8.5: Study Area Labour Force Working In Communities

<u>Community</u>	<u>Number of People</u>
Adjala-Tosorontio	450
Clearview	1,985
New Tecumseth	12,080
Springwater	2,695
Bradford West Gwillimbury	3,440
Severn	2,150
Innisfil	3,530
Ramara	890
Essa	4,985
Oro-Medonte	2,115
Collingwood	7,620
Barrie	40,700
Rama First Nation	2,470
Orillia	12,915
Wasaga Beach	1,535
Tiny	540
Christian Island	100
Tay	800
Penetanguishene	3,695
Midland	8,940
working at home	14,410
Total	128,045
% Simcoe county labour force	83.4%

source: Statistics Canada

8.3 Agriculture

Based on Statistics Canada data, 4,375 people in study area are employed in the agriculture, forestry, fishing and hunting sector, representing 2.2% of the study area labour force. It is estimated that for every job on the farm, there are 1.9 additional jobs outside of agriculture with the largest agriculture related business category being retail followed by wholesale and construction industries. In 1996, the study area labour force in agriculture and related jobs was estimated at around 14,000 (Harry Cummings & Associates, 'Economic Impact of Agriculture on Simcoe County', 1999). Based on the reported employment multiplier, the Agriculture sector including related jobs in the study area in 2001 likely was in excess of 11,000 people.

Farms in the study area account for about 4% of the farmland in the Province. Cash receipts for farms in study area in 2004 were \$275.8 million. Key agriculture commodities in the study area are:

- floriculture, nursery and sod, accounting for 16.9% of total farm receipts;
- cattle and hogs, accounting for 11.6% and 9.8% of total farm receipts respectively;
- potatoes, accounting for 11.3% of total farm receipts;
- dairy, accounting for 11.1% of the total farm receipts.

Potatoes in particular are a significant crop for the study area, accounting for 35.8% of the potato crop farmland in the province.

Source: OMAFRA, 'Simcoe County at a Glance', 2005

Additional information on farm land and gross farm receipts by municipality in study area is shown on **Table 8.6**. A review of this data generally indicates that the profitability of farms varies significantly by municipality. For example, while Oro-Medonte and Ramara account for 11.7% and 10.8% of the farmland in the study area, they only account for 7.5% and 13.4% of gross farm receipts. In comparison Essa has 6% of the farmland in the study area, and accounts for 14.7% of overall farm receipts. Clearview has the highest level of farmland and farm receipts in the study area, at 14.7% and 16.3%.

* Due to confidentiality constraints Springwater includes data for Barrie and Wasaga Beach

Table 8.6: Farm Area and Gross Receipts by Municipality in Study Area

Variables	Adjala-Tosorontio	New Tecumseth	Bradford West Gwillimbury	Innisfil	Essa	Clearview	Springwater*	Oro-Medonte	Ramara	Severn	Tay	Tiny
Total number of farms	198	162	171	163	173	361	298	370	173	187	73	134
Total area of farms (hectares)	19,187	16,414	13,178	15,886	16,478	33,772	27,854	25,519	23,559	13,126	4,863	9,048
Total gross farm receipts (excluding forest products sold) (\$ 000)	31,143.0	24,166.3	33,897.5	28,112.9	39,381.7	48,271.4	40,591.5	18,265.1	10,812.9	8,725.1	3,422.2	7,143.3

Source: Statistics Canada, Agricultural Community Profiles, 2001

Communities in the study area which have a high concentration of employment in the agricultural sector include:

- Adjala-Tosorontio (location quotient of 12.5);
- Bradford-West Gwillimbury (location quotient of 4.8);
- Innisfil (location quotient of 3.0);

- Essa (location quotient of 2.1);
- New Tecumseth (location quotient of 1.3).

8.4 Tourism

Tourism refers to the temporary movement of people from their place of residence for any purpose except migration and commuting to work. It includes business travel, pleasure travel and special purpose trips such as those that are sports or entertainment related. Tourism can also be segmented into various special interest categories such as eco-tourism and nature tourism, adventure and outdoor recreation tourism, cultural and heritage tourism, etc.

A significant portion of the tourism in the study area is related to its outdoor recreational opportunities and natural environment including eight provincial parks, 28,000 acres of managed forests; golf courses; snowmobile, hiking and biking trails including the Bruce Trail, Ganaraska Trail and Trans-Canada trail; ski hills; freshwater lakes and beaches. These types of tourism attractions are particularly important for the more rural areas of the study area. Other attractions in the study area's towns and cities include Casino Rama, Georgian Downs, Cookstown Outlet Mall, quaint villages and downtowns, antique and farm markets, four-season resorts, and various other built attractions.

Tourist visitation to the study area has increased in recent years, with a large portion of visitors being day-trippers from the GTA:

- Between 1998 and 2002, person-visits to study area grew by 30%, from around 6.5 million to 8.4 million, compared to an overall growth of only 6.1% in tourist visitation for Ontario as a whole. The number of person-visits in the study area dropped back to 6.6 million in 2003, which is around 2% higher than the 1998 level. In comparison, visitation to Ontario as a whole in 2003 was 0.6% lower than its 1998 visitation level.
- 40% of visitors to the study area in 2003 stayed in the area for one or more nights; 60% made a same-day visit;
- About 94% of overnight visitors to the study area in 2003 were Canadians (2,478,692), 4% were from the U.S (105,955) and 2% (44,583) from other countries. It is noted that the non-Canadian portion of overnight visitors to the study area, particularly U.S. visitors, is lower than the percentage of non-Canadian visitors to Ontario as a whole – for example, 15% of all overnight visitors to Ontario in 2003 were from the U.S and 3% were from other countries.
- Tourism visitation in the study area has more likely been the result of available outdoor recreation amenities and opportunities rather than built tourism attractions and facilities. For example, in 2003, 48% of overnight visitors to the study area

county participated in outdoor recreation or sports, which is significantly higher than the provincial average (36% of overnight visitors); about 11% went boating and 12% visited provincial nature parks (generally consistent with provincial average). Only about 9% went to casinos/gambling facilities in the study area.

- Visiting families and friends is also a key activity for overnight visitors to the study area, with 61% of overnight visitors participating in this activity, consistent with visitors to Ontario as a whole.
- The average per person per night spending for overnight visitors to the study area was about \$78 in 2003, slightly lower than the \$83 average for visitors to Ontario as a whole.

Source: Ontario Ministry of Tourism and Recreation, 2005

Tourism is a very broad industry and includes facilities that are used by tourists as well as the local populations to some extent. Tourism is not categorized as a separate sector in Statistics Canada data on labour force, rather data are available from Statistics Canada on two sectors that serve tourists, although it is noted that a portion of economic activity also serves local residents. These include:

- Arts, entertainment and recreation;
- Accommodation and food services.

Collectively, the labour force in the study area in these two sectors was around 20,000 or 10% of the overall labour force. Communities in the study area which have a concentration in the tourism sector are shown on *Table 8.7*.

Table 8.7: Tourism-Related Location Quotients

Community	Arts, Entertainment and Recreation LQ	Accommodation and Food Services Location LQ
Orillia	4.5	1.4
Innisfil	3.1	1.2
Collingwood	1.2	1.9
Wasaga Beach	0.4	NA
Midland	1.4	1.1
Barrie	0.5	1.4

Source: Statistics Canada, EDP Consulting

A further discussion of the tourism sector is provided in the Economic Base Review by Community later in this subsection.

8.5 Manufacturing

Nearly 18% of the study area labour force is employed within the manufacturing sector, with a location quotient of 1.1, slightly higher than the provincial average. Manufacturing is an important sector to the overall economic development of the study area because it is an export industry (as is the case for Agriculture and Tourism) where products manufactured within the county are exported out of the region, thus providing an inflow of 'new' money to the area, rather than a redistribution of dollars already in the economy. Manufacturing also has a higher economic multiplier than most sectors.

Automotive is a key manufacturing sub-sector for the study area and is the subject of a strategic initiative being undertaken by the Central Ontario Region Economic Development Alliance, representing the communities of Barrie, Orillia, Collingwood, Wasaga Beach, Midland, Penetanguishene, Tiny and Tay. The study area has a strong automotive sector presence due to Honda and several automotive parts companies such as Goodyear, Alcoa Wheel Products, Pilkington Canada, Automotive Technology, Faurecia Automotive Seating Canada Ltd, DANA Canada Inc, Emico Technologies Inc., Hastings Inc., Yachiyo of Ontario Mfg. Inc., VOAC, Goodall Trelleborg, Techform Products, TRW Vehicle Safety Systems and T1 Group Automotive Systems.

The largest manufacturer in the study area is Honda of Canada which employs more than 4,000 people in two plants.

The majority of manufacturing in the study area is concentrated in the southern portion, particularly in Barrie. The manufacturing base in the study area is generally diversified and includes many relatively small operations.

Communities in the study area which have a concentration in the manufacturing sector include:

- Barrie (location quotient is relatively low – 0.8, but the area has a significant number of manufacturing operations);
- New Tecumseth, with a location quotient of 2.7;
- Midland with a location quotient of 1.7;
- Bradford-West Gwillimbury with a location quotient of 1.2.

The manufacturing component of the economic base of individual communities is discussed in the Economic Base Review by Community later in this subsection.

8.6 Economic Base Review by Community

Economic activity within the study area is concentrated in Barrie. Smaller concentrations of economic activity also exist in south Simcoe and in communities such as Orillia, Midland and Collingwood. However the economic activity in those communities is more oriented to serving

the needs of the local and seasonal populations, while a significant portion of economic activity in Barrie is export related. An overview of the economic base by community is provided on the following pages.

8.6.1 Barrie

The City of Barrie has undergone significant growth over the past 15 years and is one of Canada's fastest growing communities. The City is expected to have the highest growth level of any community in the region, thus reinforcing Barrie's role as the largest centre in the study area.

Barrie accounted for about 28% of the population and 33% of the labour force of the study area in 2001. Population is forecasted to reach 226,300 by 2026, accounting for 37% of the study area population, with labour force forecasted to increase to 118,700, accounting for 44% of the study area's labour force.

Growth in Barrie has been shaped by its geographical proximity to the Toronto, being the first urban centre along Highway 400 north of the GTA, and by its role as a service centre to the surrounding communities for retail and public services such as health and education. The availability of more affordable housing has also been a factor influencing population growth in the City.

Barrie has a strong live-work relationship with around 2/3's of its labour force working in the city. It is marginally a net importer of labour with more people working in Barrie than commuting to work in other places: 15,600 people living north of Barrie commute into Barrie to work; 4,600 residents of Barrie commute to other areas in the study area for employment, and 8,000 residents of Barrie commute beyond study area for work (Malone Given Parsons, *Economic Development Strategy for the City of Barrie*, 2004).

As shown in **Table 8.8**, the sectors of the economy in Barrie which show relative concentration compared to the provincial average are retail trade (LQ=1.6), and accommodations and food sectors (LQ=1.4), reflecting Barrie's importance as a service centre. Given that Barrie is an urban centre, as expected, its concentration in agriculture is low.

Table 8.8: Barrie Location Quotient by Selected Sectors

Sector	LQ
Agriculture and other resource-based industries	0.1
Accommodation and Food Services	1.4
Manufacturing industries	0.8
Construction industries	1.3
Wholesale trade	1.1
Retail trade	1.6
Finance and insurance	0.7
Health & social assistance services	1.3
Education services	1.0
Professional and Technical services	0.7
Transportation & Warehousing	0.8

Source: urbanMetrics, 2004

Barrie's manufacturing sector has a relatively low location quotient concentration (0.8), however concentrations exist in a few manufacturing sub-sectors such as textile products mills, and plastics/rubber products manufacturing, with location quotients of 2.5 and 2.1 respectively.

It is noted that the manufacturing base in Barrie is fairly diversified with representation in automotive technology, plastics, food & beverage, electronic and electrical equipment, packaging, geosynthetic manufacturing, metal fabrication, household products, and agri-food products/services. Over 200 manufacturing companies have operations in Barrie.

The City also has significant operations in communications software and support systems, customer call centres, and a range of service operations.

Key Employers

Key employers in manufacturing and distribution sectors in Barrie are identified in *Table 8.9*.

Table 8.9: Key Private Sector Employers in Barrie

Name	Product or Service	Sector	No. of Employees
Faurecia Automotive Seating Canada Ltd.	Automotive Parts	Manufacturing	427
Injectech Industries Inc.	Custom Plastic Injection Moulded Parts	Manufacturing	366
Yachiyo of Ontario Mfg. Inc.	Automotive Parts	Manufacturing	320
Prodomax Industrial Automation	Production Equipment	Manufacturing	300
The Source by Circuit City	Consumer Electronics, Microcomputers	Distribution	300
Wolf Steel	Fireplaces, gas direct vents & inserts	Manufacturing	267

Name	Product or Service	Sector	No. of Employees
Canplas Industries	Plastic pipe fittings, central vac components	Manufacturing	260
DANA Canada	Heavy Truck Axles, Axle housings	Manufacturing	255
Moore Packaging	Corrugated Containers	Manufacturing	250
Risdon-AMS Canada Inc.	Cosmetic Containers and Custom Molding	Manufacturing	240

Source: Barrie Economic Development, 2005

It is expected that Barrie's role as an economic centre will be strengthened in the future. The City has a reputation as an attractive business location. The City has received exposure as a 'good location for doing business' through *Canadian Business Magazine* and the KPMG Competitive Alternatives Study. For example, the 2005 *Canadian Business* survey of Canada's best cities for business ranked 41 of Canada's largest cities on variables reflecting socio-economic health such as operating costs of doing business, the cost of living, GDP growth, unemployment and crime rates. Barrie was ranked 21st, ahead of Toronto which was ranked 39th.

A good supply and market choice of serviced industrial land, including prestige industrial and high quality business parks, is essential for future economic growth in Barrie. However, it should be noted that availability of serviced land is only one of many factors industries consider when choosing a site for expansion or relocation.

Direction for Economic Growth

An Economic Development Strategy was prepared for the City of Barrie by Malone Given Parsons in 2004. The overall direction for future economic growth in Barrie is oriented toward higher knowledge intensive industries. The Vision for the Economic Development Strategy for Barrie is stated as:

By 2008, Barrie is emerging as a recognized leader in city positioning for a more knowledge intensive economy: the place people and businesses need to be in central Ontario.

The economic development goal is to shift Barrie's employment structure, talent pool and profile to a more intensive and wealth generating profile. The economic development strategy is to:

Leverage current assets with new investment to create higher growth in innovation and more knowledge intensive enterprises: invest in quality of life for its own sake and to attract more highly skilled workers and enterprise.

Competitive land supply and infrastructure investment are 2 of the 6 recommended initiatives to support the economic development vision for Barrie. The recommended initiatives are as follows:

- *Form partnerships to drive growth and a higher quality of living;*
- *Build mechanisms supporting innovation and a more knowledge intensive employment structure;*
- *Maintain a competitive supply of employment lands;*
- *Invest strategically in infrastructure;*
- *Invest strategically in the downtown and its cultural scene;*
- *Market the city as an ever-better business location and tourism destination.*

It is noted that while serviced employment lands are currently available, there is an insufficient supply of high quality business parks. Specifically, one of the weaknesses of the City, as noted in the Economic Development Strategy report, is that there is no significant mass of attractive, high quality business parklands.

A recommendation of the Economic Development Strategy report was to define land needs and infrastructure necessary to support growth over the 30 to 50 year horizon, with a particular focus on employment lands in proximity to Highway 400 and the proposed Highway 427 extensions. It was also recommended that the City maintain a competitive and balanced supply of employment lands; create high quality business park environments, and assess employment land conversions against balanced criteria.

Future economic growth in Barrie is dependent on a number of factors including how well the City is able to overcome external negative perceptions (i.e. 'blue-collar' labour force), foster a knowledge intensive and innovation economy and competitive labour force, and compete in the economic development marketplace as a preferred location for business investment. Availability of a suitable range of serviced employment lands is a key site selection factor that industries consider in selecting a community for relocation or expansion after other critical location factors have been satisfied such as the depth and quality of the labour market (which is increasingly becoming the most important criteria) operating costs, transportation infrastructure and access to markets/suppliers/other business units.

Site selection is a process of exclusion, not inclusion, and if serviced and suitable land is not available when needed, communities are generally screened out of site selection processes. Therefore, while a sufficient supply of employment lands does not guarantee future investment and economic growth, it does help ensure that the location is not screened out by site selectors due to a lack of suitable serviced land. It also provides a competitive advantage over other locations that do not have a good supply of high quality employment lands.

8.6.2 South Simcoe

The South Simcoe region includes the five municipalities: Adjala-Tosorontio, Bradford West Gwillimbury, Essa, Innisfil and New Tecumseth. Collectively these municipalities have a population of around 104,000, which represents about 28% of the population in the study area. The 2001 labour force of South Simcoe was around 38,000, representing about 24% of the county labour force. The labour force is forecasted to increase to around 57,600 in 2026; however its relative share of the study area labour force is forecasted to decline to 21%.

The South Simcoe region, when compared to the Province, has above-average concentrations in agriculture, public administration, and manufacturing, as shown on **Table 8.10**:

Table 8.10: South Simcoe Location Quotient by Sector *

Sector	LQ
Agriculture and other resource-based industries	2.2
Manufacturing industries	1.7
Construction industries	1.1
Wholesale trade	0.8
Retail trade	0.9
Finance and insurance	1.2
Health & social assistance services	0.6
Education services	0.7
Professional and Technical services	0.4
Other services	0.8

source: urbanMetrics, 2004

* excludes Bradford-West Gwillimbury

The concentration in public administration is due to the presence of CFB Borden. The high manufacturing concentration is due primarily to the presence of Honda Manufacturing Canada. Transportation equipment manufacturing is the dominant manufacturing sub-sector in the South Simcoe region. The location quotient for this sub-sector is 7.0; the sub-sector accounts for 26% of the labour force. Non-metallic mineral product manufacturing and chemical manufacturing exhibit location quotients slightly above the provincial average – 1.4 and 1.3 respectively. For other manufacturing sub-sectors, the region's location quotients are lower than the provincial average, with 11 out of the 17 manufacturing sub-sectors having location quotients of less than 0.5.

The Agriculture and other resource-based industries sector shows concentration with a location quotient of 2.2: this includes a location quotient of 2.3 for farms and 2.1 for support activities for farms and forestry. However, in absolute terms, farming accounts for only 4.6% of the South Simcoe labour force. It is expected that although Agriculture is a growth sector in the national economy, it is unlikely that it will be a growth area within South Simcoe due to the trend toward larger farms, fewer employees and more automation (urbanMetrics, 2004).

Key Employers

Key employers in various sectors in South Simcoe are shown on **Table 8.11**.

Table 8.11: Key Employers in South Simcoe

<p><i>Auto & Auto Parts Manufacturers</i></p> <ul style="list-style-type: none"> • Honda of Canada • F&P Manufacturing Inc • Faurecia Automotive Seating Canada Ltd • Kumi Canada Corporation • Oetiker Limited 	<p><i>Transportation & Warehousing</i></p> <ul style="list-style-type: none"> • Ludlow Bus Lines Ltd • Nissan Transport (Canada) Ltd. • OPDI Logistics • Ontario Potato Distributing • Parkview Transit
<p><i>Pharmaceutical & Medicine Manufacturing</i></p> <ul style="list-style-type: none"> • Baxter Corporation 	<p><i>Hospitality and Recreation/Entertainment</i></p> <ul style="list-style-type: none"> • Nottawasaga Inn & Convention Centre • Georgian Downs Ltd
<p><i>Plastics</i></p> <ul style="list-style-type: none"> • Reagens Comiel Canada Ltd. • Temp Plastics 	<p><i>Public Administration</i></p> <ul style="list-style-type: none"> • Forces-Base Borden

Source: South Simcoe Economic Alliance, 2005

Direction for Economic Growth

A Business Attraction Strategy and Competitiveness Analysis Study for the South Simcoe region was prepared by the firm urbanMetrics in 2004. It was concluded that sectors the region should target for future investment attraction include food processing, plastics, fabricated metal manufacturing, machinery manufacturing, and chemical manufacturing.

It is noted in the urbanMetrics report that the most significant impediment to future economic development growth in South Simcoe is the lack of zoned and serviced industrial land in a variety of parcel sizes and the lack of availability of vacant rental/leasable space.

8.6.3 Town of New Tecumseth

Economic activity in south Simcoe is concentrated in New Tecumseth, which accounts for about 25% of the population but 45% of the labour force. The labour force in New Tecumseth in 2001 was 17,254 and is forecasted to increase to 26,400 by 2026.

New Tecumseth has a relatively high location quotient: 2.7 for manufacturing, with concentration in the transportation equipment manufacturing category due to the presence of Honda. Aside from this sub-sector, the range and concentration of employment in manufacturing sub-sectors is relatively low. The Town also has a slight concentration in the agricultural sector with a location quotient of 1.3. Most other sectors are under-represented with location quotients significantly under 1.

New Tecumseth's tourism sector includes the all-season resort, Nottawasaga Inn, which employs 300 people. The area is also a day-trip location for Toronto residents with attractions such as the South Simcoe Railway, Falconry Centre and Gould's Apple Orchard and fruit winery.

Key Employers

- Honda Manufacturing Canada in Alliston is the largest employers in the region, employing 4,300.
- Other key private sector firms which employ between 400 – 500 people each include: F & P Manufacturing Inc (auto suspensions), Ventra Group Inc. (OEM cuplings), Warren Gibson Ltd. (haulage), and Baxter Corporation (sterile IV bags/solutions).

8.6.4 Innisfil

The 2001 population of Innisfil was around 29,000, accounting for around 28% of the south Simcoe population. Population in Innisfil is forecasted to increase to 45,000 by 2026. The labour force was 5,914 in 2001, and is forecasted to reach 9,600 in 2026.

Innisfil has relatively large economic concentrations in the following sectors as noted by their location quotients: arts, entertainment and recreation sector (3.1) due to the concentration of gaming and tourism; agriculture (3.0); construction (2.3) and retail trade (1.8).

Innisfil's manufacturing concentration is low, with a location quotient of 0.6.

Key Employers

- The largest manufacturer in the area is Temp Plastics Ltd. which manufactures plastics/sheetings and employs 150 people. Other manufacturers which employ in the vicinity of 25 to 60 people each include Tarpin Lumber, Concord Candle Corporation, Accurate of Canada (waste containers) and Saputo Cheese Ltd.
- Georgian Downs racing tracks/slots facility employs 180 people and attracts patrons from outside the immediate area. Another key hospitality business in the area is the Kempenfelt Conference Centre, which employs 75 people.

8.6.5 Adjala-Tosorontio

The 2001 population of Adjala-Tosorontio was 10,082. The population level is forecasted to reach 15,300 by 2026. The labour force in this municipality was 1,304 in 2001, which is less than 1% of the total labour force of the study area. The labour force is forecasted by Hemson to reach 2,000 by 2026.

Adjala-Tosorontio is very rural, and has a high concentration in agriculture and related activities. The location quotient for the ‘agriculture, forestry, fishing, hunting’ sector is 12.5, with a relative concentration in pure farming and farm product wholesaler and distributors. It also has location quotients of close to 1.5 for several sectors but these relate to businesses serving the local economy and surrounding communities, not export oriented industries. Manufacturing has a particularly low concentration at 0.13 (urbanMetrics, 2004).

8.6.6 Essa

Essa is located north of New Tecumseth, east of Adjala-Tosorontio and west of Innisfil. The 2001 population in Essa was close to 16,800 and is forecasted to increase to 21,200 by 2026.

The labour force of Essa in 2001 was around 6,800, representing just over 4% of the study area labour force. It is forecasted to increase to 8,900 in 2026, with its relative portion of study area labour force dropping from 4% to 3%.

Essa has a high location quotient in the public administration category (a location quotient of 9.0) due to the presence of CFB Borden, which is the Canadian Forces' largest training centre where common support occupation training is conducted. CFB Borden comprises 21,000 acres of land, including a 6,000-acre training area and approximately 460 buildings. On average, CFB Borden trains 15,000 military personnel annually.

Essa also demonstrates a concentration in agriculture with a location quotient of 2.1.

Key Employers

- CFB Borden employs approximately 3,250 military members and approximately 1,500 civilians.
- Essa's largest private sector employers collectively employ 125 people. These include Georgian Aggregates and Construction, AMJ Campbell Van Lines, Drysdale's Tree Farm, and Scott's K. Food Market.

8.6.7 Bradford-West Gwillimbury

The population level of Bradford-West Gwillimbury was 22,228 in 2001 and is forecasted to reach 34,000 by 2026. The 2001 labour force was 6,733 and is forecasted to reach 10,700 by 2026.

The employment base in Bradford-West Gwillimbury is largely oriented toward service and agricultural sectors. The area includes Holland Marsh, a significant agricultural area. The location quotient of agriculture and other resource-based industries was 4.8.

Bradford-West Gwillimbury has a diverse range of industries, including manufacturing, construction, transportation and warehousing and services oriented toward the local population and surrounding communities.

The overall location quotient for manufacturing is 1.2. However, Bradford-West Gwillimbury does have some concentration in manufacturing sub-sectors such as plastics and rubber manufacturing (LQ=3.0), transportation equipment manufacturing (LQ=2.9), chemical manufacturing (LQ=1.7) and fabricated metal product manufacturing (LQ= 1.5).

Key Employers

Automotive parts sector:

- Closure Metal Products (Magna Int'l.)
- Faurecia
- Ventra Kumi Canada Inc Group
- AP Cantech

Plastics:

- Reagens Canada
- Vins Plastics

8.6.8 Orillia and Lake Country Region

Orillia is the economic centre of the Lake Country region, which includes the surrounding townships - Rama, Oro-Medonte, Severn and Mnikaning First Nation. The 2001 population of this region was around 68,000 of which Orillia accounted for 43%.

Orillia's population is forecasted to increase from around 29,000 in 2001 to 35,600 in 2026; however its relative share of county population is expected to decline from 7.7% to 5.8%. Its labour force is expected to grow marginally at 1.1% per annum, increasing from 16,100 in 2001 to 20,400 in 2026. Orillia's relative share of the study area's labour force is expected to decrease from 10.2% to 7.6%.

Much of Orillia's economic activity is in the tourism/ hospitality sectors, as indicated by the arts, entertainment and recreation sector with a location quotient of 4.5 and accommodation and food sector with a location quotient of 1.4 as shown on **Table 8.11**. Economic activity in Orillia is underrepresented in agricultural, manufacturing, finance/real estate and businesses services compared to Ontario as a whole, as shown in the following table. This is likely because Orillia is more of a service centre for the region and tourist destination, rather than a diversified economic centre.

Table 8.11: Orillia Census Area Labour Force Location Quotient by Sector

NAIC	Sector	Location Quotient
11	Agriculture, forestry, fishing and hunting	0.5
21	Mining and oil and gas extraction	1.2
22	Utilities	0.6
23	Construction	1.2
31-33	Manufacturing	0.7
41	Wholesale trade	0.6
44-45	Retail trade	1.2
48-49	Transportation and warehousing	0.8
51	Information and cultural industries	0.4
52	Finance and insurance	0.4
53	Real estate and rental and leasing	1.1
54	Professional, scientific and technical services	0.4
55	Management of companies and enterprises	0.0
56	Administrative and support, waste management and remediation services	0.7
61	Educational services	0.9
62	Health care and social assistance	1.4
71	Arts, entertainment and recreation	4.5
72	Accommodation and food services	1.4
81	Other services (except public administration)	1.1
91	Public administration	1.3

source: Statistics Canada, EDP Consulting

As noted previously, tourism is a key industry in Orillia and the surrounding area. Casino Rama is the largest employer and major tourist attraction. The Casino Rama complex was established in 1998. It includes a 300 suite hotel, 18,000 sq ft of meeting space, 110 gambling tables, spa, nine restaurants with 5000 seating capacity and is a venue for a wide range of entertainment and gambling. It is reported that over 10,000 patrons visit Casino Rama per day. Visitors are also attracted to the surrounding 'Lake Country' tourist region with its various recreational features including three provincial parks and numerous private campgrounds.

Key Employers

- Casino Rama is the largest employer in the area, employing around 3,700 people;
- Teletch Canada Inc., a customer management centre, employs over 800 people;
- Kubota Metal Corporation, which manufactures high and low alloy and steel castings, employs 289 people.

Other employers with over 100 workers include:

- Atlas Block - concrete blocks, retaining walls, century stone;
- CCI Thermal Technologies Inc. - industrial electric heating, heating elements;
- Dorr-Oliver Eimco - design and supply of specialized equipment and systems for mining, pulp, paper, environmental, chemical, minerals and food industries; and
- Parker Hannifin Canada - rings, seals and rubber products.

In addition to private sector employers, Orillia has a substantial public sector employment base, including the new provincial police sector training centre associated with OPP headquarters.

Direction for Economic Growth

Given the success of Casino Rama, the City of Orillia and other economic development agencies in the region are targeting tourist attractions and manufacturers and distributors of gaming equipment and supplies for investment attraction. The objective is to make Orillia the "Heart of Ontario's Lake Country", and a primary tourist destination in Ontario. Other industry targets include the automotive sector and manufacturers and distributors of security and police products.

8.6.9 Collingwood/Wasaga Beach/Clearview

Collingwood, Wasaga Beach and Clearview collectively had a population level of around 42,254 in 2001, which is forecasted to increase to 70,100 in 2026. Much of the increase is expected to occur in Wasaga Beach. The three municipalities collectively accounted for 11% of Simcoe's population base in 2001.

Collingwood is the service centre within the area, having a more diversified economic base than Wasaga Beach or Clearview.

The overall labour force of the area in 2001 was close to 17,000, with about 10,800 or around 64% of the labour force residing in Collingwood (which accounts for only 38% of the region's population). Wasaga Beach has a lower labour force participation rate (54 % in 2001, compared to 70% in Clearview and 62% for Collingwood) due to an older population base/greater portion of seniors residing in the area.

Collingwood is the service centre of the region; Wasaga Beach is a tourist resort area and Clearview is mainly rural and agricultural. The region has a slight concentration in manufacturing and construction industries, and lower economic activity concentrations than the provincial average in finance and real estate and business services categories, which is likely due to the area's role as more of a service commercial and tourist destination than a diversified economic centre (see *Table 8.12*).

Table 8.12: Collingwood Census Area Labour Force Sector Location Quotient

NAIC	Sector	Location Quotient
11	Agriculture, forestry, fishing and hunting	0.3
21	Mining and oil and gas extraction	0.4
22	Utilities	0.7
23	Construction	1.4
31-33	Manufacturing	1.2
41	Wholesale trade	0.7
44-45	Retail trade	1.2
48-49	Transportation and warehousing	0.6
51	Information and cultural industries	0.6
52	Finance and insurance	0.5
53	Real estate and rental and leasing	1.4
54	Professional, scientific and technical services	0.5
55	Management of companies and enterprises	1.0
56	Administrative and support, waste management and remediation	0.9
61	Educational services	0.8
62	Health care and social assistance	1.1
71	Arts, entertainment and recreation	1.2
72	Accommodation and food services	1.9
81	Other services (except public administration)	0.9
91	Public administration	0.6

Source: Statistics Canada, EDP Consulting

Key Employers

Key manufacturers in Collingwood include Goodyear, Alcoa Wheel Products and Pilkington Canada Limited which each employ between 500 and 600 workers.

Other key manufacturers employing more between 100 and 200 people include:

- Backyard Products
- Kaufmans
- Nacan Products.

8.6.10 South Georgian Bay Region

The South Georgian Bay region includes the municipalities of Midland, Penetanguishene, Tay, Tiny, Springwater and Christian Island. The 2001 population of the region was 59,400, with Midland and Springwater being the largest communities with population levels of over 16,000 each. The population level in the region is forecasted to increase to 76,000 by 2026. The region's relative portion of the study area's population is expected to decrease from 16% to 12%.

The labour force of the region in 2001 was around 22,000 with close to 50% residing in Midland. The labour force is forecasted to reach 28,000 in 2026, with the region's relative portion of the study area labour force declining from 14% to 10%.

As shown on **Table 8.13**, the region has a slight concentration in agriculture, manufacturing and construction, and health and education industries. Economic activity concentration in its business and finance/real estate categories is relatively low. South Georgian Bay is a significant tourist destination.

Table 8.13: Midland Census Area Labour Force Location Quotient by Sector

NAIC	Sector	LQ
11	Agriculture, forestry, fishing and hunting	0.7
21	Mining and oil and gas extraction	0.5
22	Utilities	1.0
23	Construction	1.1
31-33	Manufacturing	1.7
41	Wholesale trade	0.3
44-45	Retail trade	1.1
48-49	Transportation and warehousing	0.8
51	Information and cultural industries	0.4
52	Finance and insurance	0.4
53	Real estate and rental and leasing	0.7
54	Professional, scientific and technical services	0.4
55	Management of companies and enterprises	0.0
56	Administrative and support, waste management and remediation services	0.7
61	Educational services	0.8
62	Health care and social assistance	1.4
71	Arts, entertainment and recreation	1.4
72	Accommodation and food services	1.1
81	Other services (except public administration)	1.0
91	Public administration	0.8

source: Statistics Canada, EDP Consulting

Key Employers

In particular, Midland has a concentration in automotive parts manufacturing, with its largest employer in this sector, Techform Products Limited, employing 700 people, and TRW Vehicle Safety Systems employing 430.

Other large manufacturers in the area, employing between 200-300 people include:

- Baytech Plastics Inc. - custom thermo plastic molding
- NEBS Business Forms - business, computer forms and printing
- Saint Gobain Technical Fabrics- fiberglass, textiles, kelvar, carbon reinforcements
- Kindred Industries Ltd. - stainless steel sinks and coloured sinks
- General Mills Canada Corp. - refrigerated dough and frozen food products
- Weber Manufacturing Ltd. - steel and nickel shell
- Day Specialties Corp. - decorated tempered appliance glass

Direction for Economic Growth

Sectors being targeted for investment attraction in the region include:

- Tool, die and mould
- Plastics
- Other manufacturing
- Tourism