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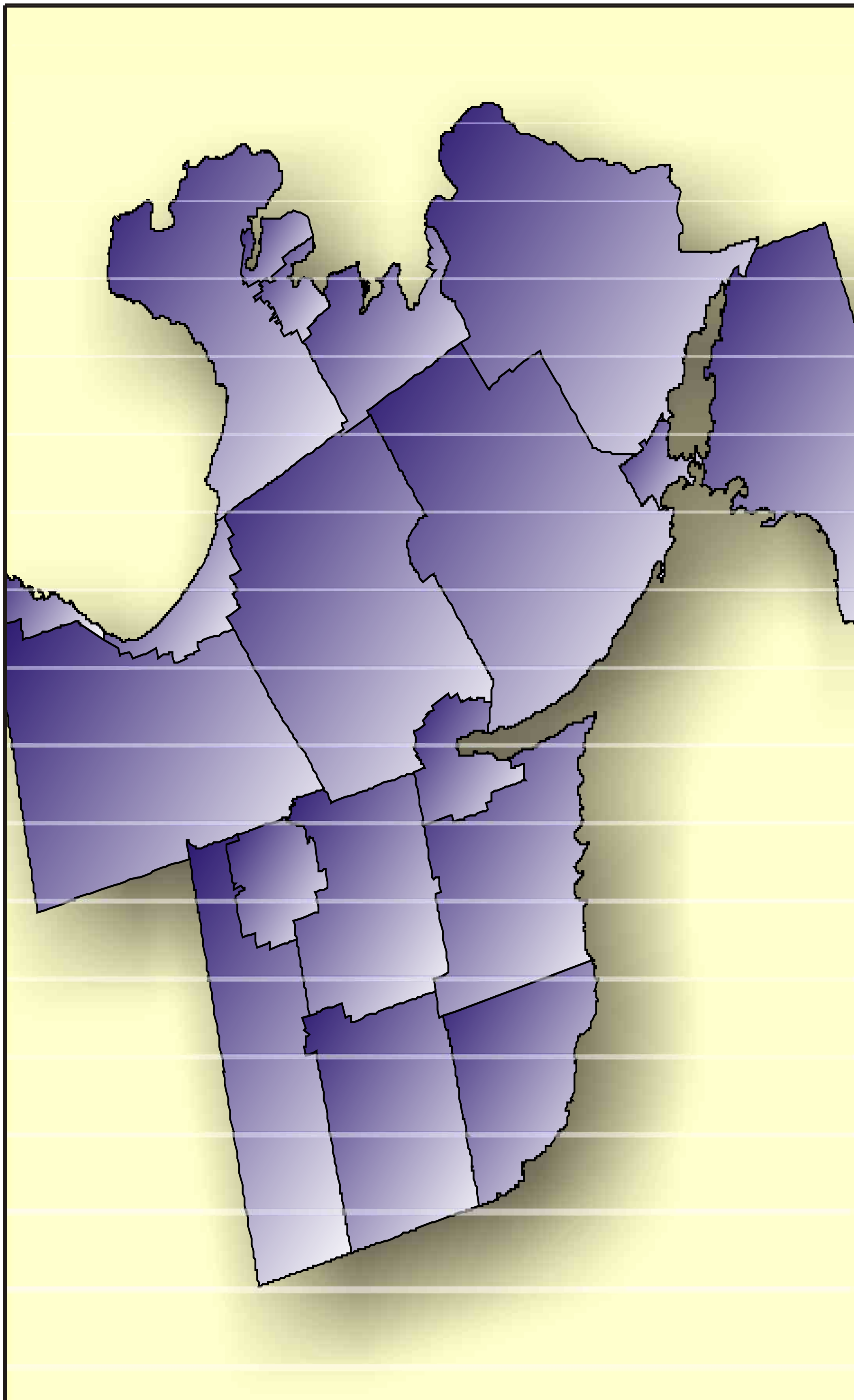
Intergovernmental Action Plan for Simcoe, Barrie & Orillia



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Existing Capacities Assessment
Demographic, Housing and Employment Trends
In Barrie, Orillia and Simcoe County

EXECUTIVE SUMMARY

INTRODUCTION

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 2004, the Province has been in discussions with the municipalities in Simcoe. 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 purpose of the IGAP is to provide the affected municipalities with the proper tools to assist them in their planning and development decision-making.

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 Existing Capacities Assessment, Phase III a Growth Potential Assessment and Phase IV an Implementation Assessment of the IGAP. Phases II - IV are being undertaken by Dillon Consulting in association with the Ainley Group, Clara Consulting, Bourrie & Associates, EDP Consulting, Enid Slack Consulting, Caldwell Consulting, Lapointe Consulting, TeraTrends and Will Dunning Inc.

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.

This Demographic, Housing and Employment Trends Development Potential Report is one component of the Phase II Existing Capacities Assessment (ECA) for the IGAP. The results of the review are documented in seven foundation reports: this Demographic, Housing and Employment Trends Report and the following reports under separate cover: Communities Report, Resources Report, Infrastructure Assessment Report, Physical Intensification Potential Report, Housing Market Pressures Report and Rural Development Potential Report. The results of the review are synthesized with the results of the Assimilative Capacity Study in an Existing Capacities Assessment Report. The overall objective for the ECA is to provide a defensible foundation for Phases III – Growth Potentials Assessment and IV Implementation Assessment of the IGAP process.

DEMOGRAPHIC TRENDS

Population Growth

This report has reviewed demographic, housing and employment trends in Barrie, Orillia and Simcoe County. The report has shown that Simcoe as a whole and particular communities within Simcoe are experiencing very high growth rates. Simcoe's growth rate is twice as high as the Province as a whole and communities such as Wasaga Beach and Barrie are among the fastest growing municipalities in Canada and Ontario.

Much of the population growth in Simcoe is concentrated in the Southern part of the study area such as Barrie, New Tecumseth and Innisfil. At the same time certain northern areas along the shores of Georgian Bay are also experiencing strong development pressure with the strongest growth being observed in Wasaga Beach. Together these four municipalities accounted for 75% of Simcoe's growth between 1996 and 2001.

Over time there has been a growing concentration of the population in Barrie which has grown from 21.7% of the study area total in 1991 to an estimated 30.2% in 2006. At the same time, the share of the population in other communities has remained constant or declined slightly. For example, Orillia's share of the population has declined from 9.0% in 1991 to an estimated 6.9% in 2006, even though it has experienced positive population growth.

A review of data from Statistics Canada on components of population growth has shown that over a six year period (1997-98 to 2002-03), natural increase accounted for 13% of population growth while net migration (the number of residents moving into Simcoe minus those moving out) accounted for 87% of the population increase. Most of the net migration was from residents moving from other parts of Ontario into Simcoe, particularly from the GTA. In contrast most of the population growth in the GTA is due to the in-migration of external immigrants (from outside of Canada).

Age Distribution

A review of the age distribution in Simcoe shows that while Simcoe's age distribution is very similar to that of Ontario, there is considerable variation among municipalities. More northern municipalities such as Collingwood, Orillia, Wasaga Beach, Penetanguishene and Midland have a higher proportion of their population who are 55+ as many people are retiring to these locations or moving there for lifestyle reasons and the existing population is aging. For example, in Wasaga Beach 38% of the population was 55 years and older in 2001. The attractiveness of these areas to older adults will be taken into account when projecting future housing requirements and population for these communities.

More southern municipalities tend to have higher proportions of young persons under 19 years of age, although First Nations' communities have the highest proportions of children and teens.

Barrie, Essa and Bradford West Gwillimbury have high proportions of their population who are younger adults - 20-29 years of age and 30-39 years of age. These municipalities tend to have affordable housing options for younger families, provide opportunities for those commuting to nearby employment opportunities and are close to natural recreational outdoor opportunities/facilities. Native communities also have high proportions of younger adults reflecting the higher birth rates in those communities.

Household Growth and Household Size

An examination of household growth shows the predominant position of Barrie which accounted for 52% of Simcoe's population change between 1996 and 2001 and 46% of household change. Other municipalities had low or negative population growth but higher household growth (e.g., Midland, Penetanguishene, Collingwood - municipalities which have higher proportions of their population who are older). As populations age, they may have positive household growth even though the overall population may decline.

Simcoe's household size has been identical to that of Ontario as a whole since 1991 and there was little change between 1996 and 2001. However, there is considerable variation within Simcoe with smaller household sizes generally found in more northern municipalities - also those municipalities with older age structures. Municipalities closer to the northern boundaries of the GTA and in the Barrie area have household sizes that range between 2.8 to 3.1 persons per household – illustrating the attractiveness of these areas to younger families.

TRENDS IN TENURE AND HOUSING PREFERENCES

Over three-quarters of Simcoe's housing (78.5%) is owned and 21.5% is rented. The highest proportion of rented housing is found in the urban areas such as Orillia, Barrie, Collingwood and Penetangiushene where between 29 to 36% of units are rented. A substantial portion of Simcoe's rental housing is in the form of rented single detached homes accounting for almost a third of rented housing.

Currently the majority of the population lives in single detached dwellings which account for over three quarters of all dwellings in Simcoe (77.1%). The highest proportions of such single detached housing are occupied by those aged 35-44 years of age, 45-54 years of age and 55-64 years of age. After 64 years of age, there is a declining preference for single detached dwellings. Overall a small proportion of the population live in semi detached which only account for 3.8% of all units – with the highest proportion found amongst younger households – presumably for affordability reasons.
Rows and other attached housing account for only 5% of all dwellings in Simcoe – well below the proportion experienced in other parts of Ontario. One would expect that over

time row housing will become a more popular house form for both affordability as well as life style reasons. Row house forms are very popular in many communities for empty nesters and retirees.

There is a strong demand for apartments among younger households and older households. As the population ages, there will be an increasing demand for apartments and other forms of housing oriented to seniors such as smaller singles and attached housing.

While the housing preferences in Simcoe tend to reflect fairly traditional housing choices compared to Southern Ontario and in many municipalities in the GTA, there is an increasing demand for higher density housing for empty nesters, early retirees and seniors. In the Growth Potential Assessment report, we will use data from housing preferences in Simcoe, Ontario and the GTA to estimate future housing choices in Simcoe.

Projected Population

The population in Simcoe is projected to increase from 392,000 in 2001 (post-censal) to 667,000 in 2031 representing an increase of 70%. While much of this growth will come from young families as a result of local growth or in-migration from other places in the Greater Toronto Area, there will also be a significant aging of the population. This is a trend that is occurring across Canada and Ontario and municipalities need to plan to ensure that there are sufficient housing choices for older adults and local community support services. The challenge in the Growth Potential Assessment will be to provide an urban structure that respects the individual differences and strengths among local communities and the natural environment but also provides sufficient housing opportunities to meet the projected population and household growth and the projected characteristics of such growth.

EMPLOYMENT TRENDS AND PROJECTIONS

Simcoe's Economic Strengths

Simcoe has a well balanced economy with strength in the primary sector (agriculture), manufacturing and the service sector and tourism sector. Different communities have different economic strengths with some communities having more diversified economies than others. Barrie and New Tecumseth represent the predominant employment centre with a strong manufacturing base that continues to show impressive improvements.

Municipalities located along the waterfront of Georgian Bay and Lake Simcoe are more oriented to tourism and to recreational and life style developments, including housing developments for retirees. These communities have strong hospitality and food service industries and a growing service sector catering to full-time residents and part-time visitors.

Industrial employment continues to be important in a number of different communities such as Midland and Collingwood. The challenge in the future will be to ensure that new jobs are well-paying jobs and not concentrated in lower-paying service sector jobs.

The role of agriculture has been discussed in depth in Wayne Caldwell's report on *Rural Development Potential: Simcoe County.* While the level of employment in agriculture is anticipated to decline, its importance to the local economy will continue to be important not only as a source of revenue but also because of food-related industries that depend on the local agricultural base.

Place of Employment and Commuting Trends

While a number of municipalities come close to the ideal ".5 jobs per resident" most are well below this. Again, the challenge for the future will be to continue to attract employment that can service the local population and that can be used to export goods and services outside the local population. This will help to reduce commuting in the future and ensure a healthy economy.

The greatest opportunity for residents to find employment within their place of residence was found in Barrie, Collingwood, Midland and Orillia. Other municipalities with significant local employment opportunities were New Tecumseth and Penetanguishene. Residents most likely to commute to work outside of Simcoe live in Bradford West Gwillimbury, Innisfil and New Tecumseth – communities on the edge of the GTA.

Most residents of Simcoe (75.4%) in 2001 also worked there. Another 23.4% of residents worked in other areas of the GTA. Only 1.2% worked in other parts of Ontario or Canada.

Almost 42% of those who commuted to work were employed in the municipality in which they resided. Another 33.6% worked in other areas of Simcoe. Most commuters who found employment in the GTA commuted to York Region (10.2%). Commuters to Toronto accounted for another 8.4%, while those employed in Peel accounted for 4.5%. Both Durham and Halton attracted few job-seekers with less than 1% of Simcoe residents commuting to these destinations for work.

Employment Projections

Simcoe's employment is projected to increase from 153,000 to 254,000 – or 101,000 representing an increase of 66%. An employment increase of this size will help to ensure that Simcoe has a balance in the future of jobs and residents and that its southern end does not become a bedroom community for the GTA.

IMPLICATIONS FOR GROWTH POTENTIAL ASSESSMENT (GPA)

The demographic, housing and employment trends have several implications for growth and development in the IGAP study area.

1. The Simcoe area is anticipated to grow to 667,000 by 2031 – an increase of 275,000 people between 2001 and 2031. Such growth will account for approximately a third of growth in the Outer Ring. The challenge will be to accommodate this growth in a way that promotes a high quality of life while preserving the natural features of Simcoe including its agricultural base.
2. The aging of the population will pose particular challenges for the IGAP study area as it will for Canada and Ontario. There will be a need to support the development of communities and individual developments that cater to the 55+ age groups and provide community support services that enable such individuals to live independently as long as is possible.
3. Based on demographic trends and the objectives of the Growth Plan for the Greater Golden Horseshoe, 2006 report, there will be a need to provide a greater mix of dwelling units in the future than is currently the case which is predominantly oriented to low density housing, single detached dwellings.
4. Smaller households in the future will result in a need for smaller housing especially for empty nesters and retirees, again reinforcing the need for more medium density and higher density housing.
5. While housing affordability is a problem for low and moderate income households today, housing affordability may affect more households in the future as land becomes more expensive in the GTA and this pushes up land and housing costs in Simcoe. Again, this reinforces the need for a greater mix of dwelling types in the future.
6. In order to achieve "complete communities" as outlined in the Growth Plan for the Greater Golden Horseshoe, 2006, employment opportunities across Simcoe, Barrie and Orillia, among other factors, are required.

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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 2004, the Province has been in discussions with the municipalities in Simcoe. 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 Existing Capacities Assessment, Phase III a Growth Potential Assessment and Phase IV an Implementation Assessment of the IGAP. Phases II - IV are being undertaken by Dillon Consulting in association with the Ainley Group, Clara Consulting, Bourrie & Associates, EDP Consulting, Enid Slack Consulting, Caldwell Consulting, Lapointe Consulting, TeraTrends and Will Dunning Inc.

This Demographic, Housing and Employment Trends Report is one component of the Phase II Existing Capacities Assessment (ECA) for the IGAP. The purpose of the ECA is to:

- Assemble a sound and defensible database on infrastructure and services; and

- Determine existing capacity to accommodate approved development and growth.

The ECA includes a review of:

- Approved development and planned land use in settlement areas;

- Physical potential for intensification in settlement areas;

- Existing and planned water and sanitary sewage infrastructure;

- Natural and cultural heritage resources;
- Transportation facilities;
- Public service facilities;
- Economic indicators;
- Rural development potential;
- Short-term housing market pressures; and
- Longer-term population and employment trends in the study area.

The results of the review are documented in seven foundation reports: this Demographic, Housing and Employment Trends Report and the following reports under separate cover: Communities Report, Resources Report, Infrastructure Assessment Report, Physical Intensification Potential Report, Housing Market Pressures Report and Rural Development Potential Report. The results of the review are synthesized with the results of the Assimilative Capacity Study in an Existing Capacities Assessment Report. The overall objective for the ECA is to provide a defensible foundation for Phases III – Growth Potentials Assessment and IV Implementation Assessment of the IGAP process.

1.2 PURPOSE OF THIS REPORT

The purpose of this report is to examine past and anticipated demographic and socio-economic trends that relate to growth and the characteristics of that growth in the IGAP Study Area. Topics to be covered include:

- population and household growth;
- components of growth (natural increase and migration patterns);
- household size;
- population and household growth projections for the IGAP study area;
- employment and commuting trends; and
- projected employment.

Understanding these trends will assist in the development and assessment of alternative population, housing and employment growth scenarios particularly at the local level.

1.2 FORMAT OF THE REPORT

This Demographic, Housing and Employment Trends Report is divided into six 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 provides a review of population and housing trends, Sections 3 the trends in tenure and housing, Section 4 employment characteristics and Section 5 projected population, household and employment growth. Section 6 provides a summary and conclusions as well as implications of the findings for growth and development in Simcoe.

Table 1: Population in the Greater Golden Horseshoe, 2001-2031 (population in thousands)

	2001	2011	2021	2031
City of Toronto	2590	2760	2930	3080
Region of Peel	1030	1320	1490	1640
Region of York	760	1060	1300	1500
Region of Durham	530	660	810	960
Region of Halton	390	520	650	780
City of Hamilton	510	540	590	660
GTAH (Greater Toronto Area and Hamilton) Total	5810	6860	7770	8620
County of Northumberland	80	87	93	96
County of Peterborough*	131	137	144	149
City of Kawartha Lakes	72	80	91	100
Haldimand County	46	49	53	56
Region of Niagara	427	442	474	511
County of Brant*	129	141	157	173
Region of Waterloo	456	526	623	729
County of Wellington*	195	223	269	321
County of Dufferin	53	62	71	80
County of Simcoe*	392	484	583	667
Outer Ring Total**	1980	2230	2560	2880
Total GGH	7790	9090	10330	11500

** includes single tier municipalities, e.g., Simcoe includes the City of Barrie and the City of Orillia*
*** totals may not add up due to rounding*

Source: Hemson Consulting "The Growth Forecast for the Greater Golden Horseshoe", January 2005.

2 POPULATION AND HOUSING TRENDS AND PROJECTIONS

2.1 POPULATION GROWTH IN ONTARIO AND GGH

2.1.1 Ontario Projected Population Growth

In February, 2005, the Ministry of Finance released its most recent population projections for the 49 Census Divisions in Ontario for the 27-year period 2004 to 2031.[1] The report uses post-censal estimates for 2004 provided by Statistics Canada for Ontario and its census divisions. The post-censal estimates includes an estimate of the undercount in the 2001 Census across Ontario and are, therefore, higher than projections based on the Census. The 2031 projected population for Simcoe County, Barrie and Orillia as stated in the Growth Plan for the Greater Golden Horseshoe is 667,000. This projected population includes the census undercount.

The Ministry of Finance prepared three scenarios – a medium-growth or reference scenario, a high-growth scenario and a low-growth scenario. Under the reference scenario, Ontario's population is expected to grow from a population estimate of 12.4 million in July, 2004 to 16.4 million in 2031 representing a growth of 4 million persons or 32.6%. Under the low-growth scenario, the population is expected to grow to 14.5 million and under the high-growth scenario, Ontario's population is expected to reach 18 million persons.

Over the projection period, the rate of population growth in the reference scenario will decline from 1.3% in the first year to 0.7% in the last year. During the first 10-year period, the annual rate of growth in the reference scenario is 1.2% compared to 1.4% during the previous decade. The annual rate of growth is projected to slow to 1% in the second decade and 0.8% in the rest of the projection period. The slowing of growth is mainly due to a slowing of natural increase resulting from declining fertility rates and the aging of the baby boom generation. Nevertheless, the number of births in Ontario will increase from 130,000 in the first year of projections to 157,000 in 2024-25 because of an increase in the number of women in child-bearing ages and slightly increasing fertility rates in the reference scenario. Births start to decline slowly in 2025-26 falling to 155,000 at the end of the projection period. Deaths will increase as baby boomers age—increasing from 82,000 in the first year of projections to 136,000 at the end of the projection period.

Over the first decade, natural increase remains roughly constant at 48,000 (when births and deaths increase at about the same pace). After the first decade deaths rise faster than births and natural increase declines rapidly. The reason for the continued increase in Ontario's population is because of the assumed net migration into Ontario For example, in the reference scenario over the first decade of the projections (2004-2014),

[1] Ministry of Finance, Ontario Population Projections, 2004-2031: Ontario and its 49 Census Divisions, February 2005

Table 2: Growth for 5-year Periods, 1981-2001,
Simcoe, Greater Toronto, Greater Toronto (minus the City of Toronto) and Ontario

	1981	1986	1991	1996	2001
Simcoe	225,061	238,408	288,684	329,865	377,050
5-year Change		5.9%	21.1%	14.3%	14.3%
Annual Growth Rate		1.2%	3.9%	2.7%	2.7%
Greater Toronto Area	3,419,692	3,735,031	4,237,747	4,630,879	5,083,827
5-year Change		9.2%	13.5%	9.3%	9.8%
Annual Growth Rate		1.8%	2.6%	1.8%	1.9%
GTA minus Toronto	1282297	1542310	1961976	2245458	2602333
5-year Change		20.3%	27.2%	14.4%	15.9%
Annual Growth Rate		3.8%	4.9%	2.7%	3.0%
Ontario	8,625,107	9,101,694	10,084,885	10,753,573	11,410,046
5-year Change		5.5%	10.8%	6.6%	6.1%
Annual Growth Rate		1.1%	2.1%	1.3%	1.2%

Source: Census for various years and Lapointe Consulting

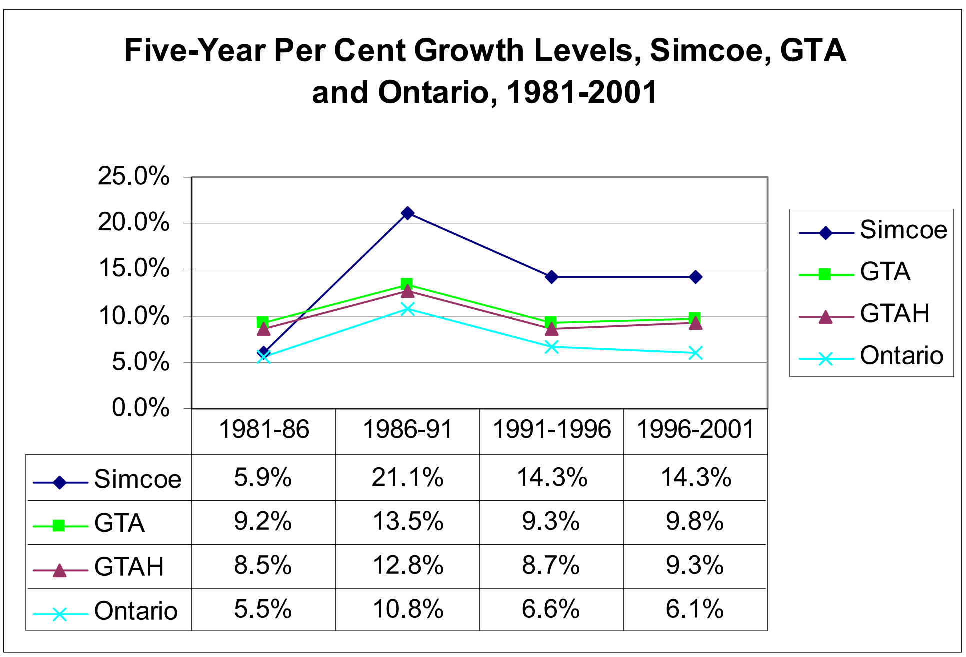

Figure 1

Source: Census various years and Lapointe Consulting net migration will add 1.1 million to the population accounting for 70% of Ontario's population increase. Over the full projection period, net migration will account for 72% of Ontario's population increase and add over 2.9 million people to Ontario's population.

2.1.2 Projected Growth in the Greater Golden Horseshoe

In 2001 the Greater Golden Horseshoe (GGH), including the outer ring, was home to 7.8 million people representing two-thirds of Ontario's residents.[2] By 2031, the GGH is projected to grow by an additional 3.7 million persons to reach a 2031 population of 11.5 million persons (Refer to Table 1 on opposite page 6). This growth will account for over 80% of Ontario's population increase and by 2031, 70% of Ontario's residents are expected to live in the GGH region.[3]

Migration to the GGH from within Canada and abroad will be the main source of population growth. While growth in the inner ring is driven by international immigration, growth in most of the outer ring will be based on out-migration from the inner ring. Simcoe (which includes Barrie, Orillia and Simcoe County) will have one of the highest growth rates in the GGH as its population will grow by 70% over the 2001-2031 period. The anticipated growth in Simcoe to 667,000 persons in 2031 from 392,000 persons in 2001 represents approximately a third (31%) of population growth in the outer ring between 2001 and 2031. Despite the high anticipated growth in Simcoe between 2001 and 2031, population increase in this area is expected to account for only 7% of the total GGH area population growth.

2.2 POPULATION GROWTH IN BARRIE/ORILLIA/SIMCOE

2.2.1 Comparison of Growth in Simcoe, GTA and Ontario

The Simcoe Census Division (Barrie/Orillia/Simcoe) is one of the fastest growing census divisions (CD) in Ontario. For example, the fastest growing CD in Ontario was York Region whose population grew by 23% in the period 1996-2001; Peel Region's population grew by 16% and the population in the Simcoe Census Division grew by 14%. During the same period, Ontario's population grew by 6%. After Simcoe, the next fastest growing CD's were Dufferin County (five-year growth rate of 12%), Durham Regional Municipality (five-year growth rate of 11%) and Halton Regional Municipality (which grew by 10.4%).

[2] The Greater Golden Horseshoe includes the Greater Toronto Area (the City of Toronto and the Regional Municipalities of York, Durham, Peel and Halton) and the City of Hamilton. Ten other areas are included in the outer ring of the GGH including: Simcoe, Northumberland, Peterborough, Kawartha Lakes, Haldimand, Niagara, Brant, Waterloo, Wellington and Dufferin.
[3] Province of Ontario, *Places to Grow: Draft Growth Plan*, 2005, Page 13

Table 3a: Components of Growth, 1997-2003: Simcoe

Simcoe Components Of Growth									
Year	Natural Increase	% Of Ontario	Net Internat'l Migration	% Of Ontario	Net Internal Migration	Total Net Migration	% Of Ontario	Growth	% Of Ontario
1997-98	1,391	2.7%	(91)	-0.1%	7,590	7,499	9.0%	8,890	6.6%
1998-99	1,392	2.8%	(215)	-0.3%	8,548	8,333	10.1%	9,725	7.4%
1999-00	1,227	2.6%	(38)	0.0%	9,949	9,911	8.6%	11,138	6.8%
2000-01	1,033	2.4%	72	0.1%	7,093	7,165	4.6%	8,198	4.2%
2001-02	1,308	2.6%	161	0.1%	8,436	8,597	5.8%	9,905	5.0%
2002-03	1,089	2.4%	255	0.3%	8,173	8,428	8.8%	9,517	6.7%
Annual Avg.	1,240	2.6%	24	0.0%	8,298	8,322	7.3%	9,562	5.9%

Source: Statistics Canada, Annual Demographic Statistics, Catalogue #91-213, various years

Table 3b: Components of Growth, 1997-2003: Toronto CMA

Toronto CMA Components Of Growth									
Year	Natural Increase	% Of Ontario	Net Internat'l Migration	% Of Ontario	Net Internal Migration	Total Net Migration	% Of Ontario	Growth	% Of Ontario
1997-98	30,856	59.4%	66,156	89.7%	(10,007)	56,149	67.7%	87,005	64.5%
1998-99	29,105	59.4%	59,174	90.4%	(8,294)	50,880	61.9%	79,985	61.0%
1999-00	29,209	61.2%	78,028	84.3%	(13,260)	64,768	56.4%	93,977	57.8%
2000-01	28,730	67.8%	114,384	83.9%	(9,717)	104,667	67.6%	133,397	67.6%
2001-02	32,288	65.1%	118,832	82.5%	(21,755)	97,077	65.0%	129,365	65.0%
2002-03	30,755	66.9%	88,245	90.5%	(24,898)	63,347	66.2%	94,102	66.4%
Annual Avg.	30,157	63.3%	87,470	86.9%	(14,655)	72,815	64.1%	102,972	63.7%

Source: Statistics Canada, Annual Demographic Statistics, Catalogue #91-213, various years

Table 3c: Components of Growth, 1997-2003: Ontario

Ontario Components Of Growth									
Year	Natural Increase	% Of Ontario	Net Internat'l Migration	% Of Ontario	Net Internal Migration	Total Net Migration	% Of Ontario	Growth	% Of Ontario
1997-98	51,939	100%	73,719	100%	9,231	82,950	100%	134,889	100%
1998-99	48,971	100%	65,494	100%	16,706	82,200	100%	131,171	100%
1999-00	47,737	100%	92,521	100%	22,369	114,890	100%	162,627	100%
2000-01	42,388	100%	136,283	100%	18,623	154,906	100%	197,294	100%
2001-02	49,593	100%	144,033	100%	5,354	149,387	100%	198,980	100%
2002-03	45,971	100%	97,516	100%	(1,814)	95,702	100%	141,673	100%
Annual Avg.	47,767	100.0%	101,594	100.0%	11,745	113,339	100.0%	161,106	100.0%

Source: Statistics Canada, Annual Demographic Statistics, Catalogue #91-213, various years

Figure 1 and Table 2 on page 8 shows growth in Simcoe, the GTA (Greater Toronto Area), the Greater Toronto Area and Hamilton (GTAH) and Ontario for five-year periods between 1981 and 2001. The data shows that in the five-year period 1986-1991 during the economic and housing boom and period of high housing prices in the GTA, Simcoe's population growth rate was approximately twice that of the GTA's. During the subsequent recession, Simcoe's growth rate was still higher than that of the GTA although the two growth rates were closer (14% in Simcoe compared to 9% in the GTA). A similar pattern is observed in the 1996-2001 period as in the 1991-96 period with Simcoe growing 14% compared to 10% in the GTA. It is interesting to note that Simcoe's growth rate is more in line with that of the GTA excluding the City of Toronto, that is, the more suburban parts of the GTA.

During all three growth periods following 1986 (1986-91, 1991-96 and 1996-2001), Simcoe's growth rate is at least twice that of Ontario's as a whole. This table demonstrates that Simcoe's population growth rate is susceptible to housing affordability considerations in the Greater Toronto Area – when housing prices rose significantly in the late 1980's, residents sought more affordable housing in other areas of Ontario including Simcoe.

More recent data collected by Will Dunning indicates that between 2001 and 2005, the level of building permits issued for low-rise buildings in Simcoe has been growing at a slightly lower level than in the GTA. As of 2004 and 2005, the trends for the GTA and Simcoe have moved closer together. (Refer to Chart in *Housing Market Pressures in Simcoe County Report* on page 19.) This suggests that population growth in Simcoe has in all likelihood increased at a somewhat lower rate since 2001 than in the GTA.

2.2.2 Components of Growth in Simcoe

In this section we examine the role that natural increase and migration play in population growth in Simcoe. As is shown in Table 3a on the opposite page, natural increase over the six-year period, 1997-98 to 2002-03, has accounted for an average of 1,240 persons per year in Simcoe. (At the time of writing this report, the most recent data available from Statistics Canada was for 2002-2003.) By contrast net migration – which is the sum of all those who have moved into Simcoe from other places in Ontario, Canada or abroad minus the sum of all those who have moved out of Simcoe accounted for average of 8,322 persons per year over the same time period.

Compared to Toronto and Ontario, net international migration (the difference between international immigrants and international emigrants) is barely a factor in Simcoe's growth. On average net international migration contributes less than 25 persons a year to Simcoe's growth. By contrast, the Toronto CMA accounts for over 85% of Ontario's average of approximately 100,000 net international migrants. (Refer to Table 3b.)

Table 4: Population in Simcoe and Area Municipalities, 1991-1996

	1991	1996	Change 1991-96	% Change	% of Simcoe Change
Adjala-Tosorontio - TP	8,637	9,361	724	8.4%	1.8%
Barrie C	62,728	79,191	16,463	26.2%	40.0%
Bradford West Gwillimbury T	17,702	20,213	2,511	14.2%	6.1%
Christian Island R	429	508	79	18.4%	0.2%
Clearview TP	11,598	12,407	809	7.0%	2.0%
Collingwood T	14,382	15,596	1,214	8.4%	2.9%
Essa TP	14,685	16,363	1,678	11.4%	4.1%
Innisfil T	21,249	24,711	3,462	16.3%	8.4%
Midland T	14,485	15,035	550	3.8%	1.3%
Mnjikaning First Nation (Rama)	372	530	158	42.5%	0.4%
New Tecumseth T	20,344	22,902	2,558	12.6%	6.2%
Orillia C	25,925	27,846	1,921	7.4%	4.7%
Oro-Medonte TP	15,713	16,698	985	6.3%	2.4%
Penetanguishene T	6,862	7,291	429	6.3%	1.0%
Ramara TP	6,820	7,812	992	14.5%	2.4%
Severn TP	8,496	10,257	1,761	20.7%	4.3%
Springwater TP	13,173	14,793	1,620	12.3%	3.9%
Tay TP	10,410	10,965	555	5.3%	1.3%
Tiny TP	8,168	8,644	476	5.8%	1.2%
Wasaga Beach T	6,457	8,698	2,241	34.7%	5.4%
Total	288,635	329,821	41,186	14.3%	100.0%

Table 5: Population in Simcoe and Area Municipalities, 1996-2001

	1996	2001	Change 1996-01	% Change	% of Simcoe Change
Adjala-Tosorontio - TP	9,359	10,082	723	7.7%	1.5%
Barrie C	79,191	103,710	24,519	31.0%	52.0%
Bradford West Gwillimbury T	20,213	22,228	2,015	10.0%	4.3%
Christian Island R	508	515	7	1.4%	0.0%
Clearview TP	12,407	13,796	1,389	11.2%	2.9%
Collingwood T	15,596	16,039	443	2.8%	0.9%
Essa TP	16,363	16,808	445	2.7%	0.9%
Innisfil T	24,711	28,666	3,955	16.0%	8.4%
Midland T	16,347	16,214	-133	-0.8%	-0.3%
Mnjikaning First Nation (Rama)	530	597	67	12.6%	0.1%
New Tecumseth T	22,904	26,141	3,237	14.1%	6.9%
Orillia C	27,846	29,121	1,275	4.6%	2.7%
Oro-Medonte TP	16,698	18,315	1,617	9.7%	3.4%
Penetanguishene T	7,900	8,316	416	5.3%	0.9%
Ramara TP	7,812	8,615	803	10.3%	1.7%
Severn TP	10,257	11,135	878	8.6%	1.9%
Springwater TP	14,793	16,104	1,311	8.9%	2.8%
Tay TP	9,044	9,162	118	1.3%	0.3%
Tiny TP	8,644	9,035	391	4.5%	0.8%
Wasaga Beach T	8,698	12,419	3,721	42.8%	7.9%
Total	329,821	377,018	47,197	14.3%	100.0%

Note : Between 1996 and 2001, Statistics Canada adjusted certain populations so that some 1996 populations in Table 4 and Table 5 are not identical. For example, Tay's 1996 population was decreased by 1,921 persons for 1996 in the 2001 census data; Penetanguishine's 1996 population was increased by 609 persons and Midland's 1996 population was increased by 1,312 persons.
Note 2: Collingwood's population was adjusted backwards in 1996
Source: Statistics Canada, 1996 and 2001 Census

In large part, Simcoe's growth is the result of significant net internal migration (the difference between those who leave Simcoe for other parts of Ontario or Canada and those who arrive from other parts of Ontario or Canada) – mostly from other parts of Ontario. Between 1997 and 2003 internal net migration accounted for 87% of Simcoe's growth. Natural increase accounted for the remaining 13%. This trend contrasts with the Toronto CMA where net international immigration represented 85% of average annual population growth between 1997 and 2003 while there was a net loss of provincial migrants. The Toronto CMA has been losing an average of almost 15,000 persons annually due to migration out of Toronto to other parts of Ontario and Canada.

An analysis of the age distribution of in-migrants into Simcoe shows that the majority were in the 25 to 44 age range with the highest concentration in the 30 to 39 age group, who accounted for an estimated quarter of the new arrivals – reflecting the attraction of Simcoe to younger families. That approximately a tenth (8%) of new arrivals were over the age of 75 is also significant.[4]

Table A1 in the Appendix compares the number of persons moving out of Toronto to other parts of Ontario to the number of persons moving into Simcoe from other locations in Ontario. Although the data does not reveal where those leaving Toronto move to, given the proximity of Simcoe County, we can infer that a significant portion of those moving into Simcoe from other parts of Ontario are in fact moving from the Toronto CMA. Between 1997 and 2003 the ratio of persons moving into Simcoe County to persons moving out of Toronto has been consistently in the range of 28 to 30 percent.

2.2.3 Urban/Rural Split

The *Rural Development Potential:Simcoe County* report prepared by Caldwell Consulting discussed the urban/rural split in Simcoe. In 2001 85% of Simcoe's population was classified by Statistics Canada as urban and 29% as rural. Simcoe has a larger population that is rural compared to Ontario (29% compared to 15% in Ontario as a whole). Six municipalities had populations that were classified as 100% rural – Tiny, Ramara, Oro-Medonte, Mnjikaning First Nation 32 and Christian Island - each is located in northern Simcoe County. The municipalities of Adjala-Tosorontio, Clearview, Springwater and Severn had between 60% and 90% of their population classified as rural. Essa, Tay and Wasaga Beach each had a similar percentage of their population classified as urban and rural – with a range of between 40% to 60% of their population being rural. Municipalities in southern Simcoe County close to Highway 400 had a higher percentage of their population classified as urban – New Tecumseth, Bradford West

[4] The age distribution of migrants was calculated by aging each cohort from 1996 to the next cohort in 2001. After subtracting deaths calculated using Ontario mortality table the difference between natural growth and the 2001 census was estimated to be the net migration for that age cohort. The cohort 0-4 is made up of the births between 1996 and 2001 from the population projections in the mode.

Table 6: Share of Simcoe's Population and Population Change, 1991-1996 and 1996-2001

	1991 Pop.Share	1991-96 % of Ch.	1996 Pop. Share	1996-01 % of Ch.
Adjala-Tosorontio - TP	3.0%	1.8%	2.8%	1.5%
Barrie C	21.7%	40.0%	24.0%	52.0%
Bradford West Gwillimb	6.1%	6.1%	6.1%	4.3%
Christian Island R	0.1%	0.2%	0.2%	0.0%
Clearview TP	4.0%	2.0%	3.8%	2.9%
Collingwood T	5.0%	2.9%	4.7%	0.9%
Essa TP	5.1%	4.1%	5.0%	0.9%
Innisfil T	7.4%	8.4%	7.5%	8.4%
Midland T	5.0%	1.3%	5.0%	-0.3%
Mnjikaning First Nation (	0.1%	0.4%	0.2%	0.1%
New Tecumseth T	7.0%	6.2%	6.9%	6.9%
Orillia C	9.0%	4.7%	8.4%	2.7%
Oro-Medonte TP	5.4%	2.4%	5.1%	3.4%
Penetanguishene T	2.4%	1.0%	2.4%	0.9%
Ramara TP	2.4%	2.4%	2.4%	1.7%
Severn TP	2.9%	4.3%	3.1%	1.9%
Springwater TP	4.6%	3.9%	4.5%	2.8%
Tay TP	3.6%	1.3%	2.7%	0.3%
Tiny TP	2.8%	1.2%	2.6%	0.8%
Wasaga Beach T	2.2%	5.4%	2.6%	7.9%
Total	100.0%	100.0%	100.0%	100.0%

Source: Statistics Canada, 1991, 1996 and 2001 Census

Table 7: Share of Population in 1991, 1996 and 2001

	1991		1996		2001	
	Pop.	% of Total	Pop.	% of Total	Pop.	% of Total
Adjala-Tosorontio - TP	8,637	3.0%	9,359	2.8%	10,082	2.7%
Barrie C	62,728	21.7%	79,191	24.0%	103,710	27.5%
Bradford West Gwillimbury T	17,702	6.1%	20,213	6.1%	22,228	5.9%
Christian Island R	429	0.1%	508	0.2%	515	0.1%
Clearview TP	11,598	4.0%	12,407	3.8%	13,796	3.7%
Collingwood T	14,382	5.0%	15,596	4.7%	16,039	4.3%
Essa TP	14,685	5.1%	16,363	5.0%	16,808	4.5%
Innisfil T	21,249	7.4%	24,711	7.5%	28,666	7.6%
Midland T	14,485	5.0%	16,347	5.0%	16,214	4.3%
Mnjikaning First Nation (Rama)	372	0.1%	530	0.2%	597	0.2%
New Tecumseth T	20,344	7.0%	22,904	6.9%	26,141	6.9%
Orillia C	25,925	9.0%	27,846	8.4%	29,121	7.7%
Oro-Medonte TP	15,713	5.4%	16,698	5.1%	18,315	4.9%
Penetanguishene T	6,862	2.4%	7,900	2.4%	8,316	2.2%
Ramara TP	6,820	2.4%	7,812	2.4%	8,615	2.3%
Severn TP	8,496	2.9%	10,257	3.1%	11,135	3.0%
Springwater TP	13,173	4.6%	14,793	4.5%	16,104	4.3%
Tay TP	10,410	3.6%	9,044	2.7%	9,162	2.4%
Tiny TP	8,168	2.8%	8,644	2.6%	9,035	2.4%
Wasaga Beach T	6,457	2.2%	8,698	2.6%	12,419	3.3%
Simcoe - Total	288,635	100.0%	329,821	100.0%	377,018	100.0%

Source: Statistics Canada, 1991, 1996 and 2001 Census

Gwillimbury and Innisfil had over 70% of their population classified as urban. Four municipalities were 100% urban – Barrie, Orillia, Penetanguishene and Midland.

2.2.4 Growth Within Simcoe

Tables 4 and 5 on page 12 show population growth in the 1996-2001 period and the 1991-1996 period. Two municipalities within the IGAP study area were among the fastest growing municipalities across Canada between 1996 and 2001. Between 1996 and 2001 Wasaga Beach grew by 42.8% and Barrie by 31%. (Most of the other fastest growing municipalities in Canada were in Alberta.)

Wasaga Beach was also the fastest growing municipality in Ontario followed by Vaughan the second fastest (37.3%) and Barrie was the third fastest. (see Table A2 in the Appendix). The next fastest growing municipalities were in the GTA, where Richmond Hill grew by 29.8%, Caledon by 26.8%, Brampton by 21.3% and Markham by 20.3%.A comparison of the shares of Simcoe's growth between 1991-96 and 1996-2001 in Tables 6 and 7 on the opposite page shows the predominant position of Barrie in the IGAP study area. Barrie accounted for 52% of 1996-2001 growth, up from 40% in the previous five-year period. Wasaga Beach's share also rose from 5.4% of growth in 1991-1996 to 7.9% in 1996-2001. Other major shares of growth were accounted for by New Tecumseth which accounted for 7% of growth in 1996-2001 and Innisfil which accounted for 8% of growth in this period. Together these four municipalities accounted for 75% of Simcoe's growth in the period between 1996-2001. Barrie has grown from 21.7% of the study area population in 1991 to 27.5% in 2001; at the same time, shares in other municipalities have either remained the same or declined.

Figure 2 below shows the distribution of Simcoe's population across area municipalities while Table 6 and 7 on the opposite page shows how the shares have been changing over the decade 1991-2001. Barrie, the major population centre in Simcoe, had 28% of the population in 2001. When adjacent municipalities such as Innisfil, Essa and Springwater are included, the Barrie area had 44% of the IGAP study area's population in 2001; Orillia had close to 8% and New Tecumseth and Bradford/West Gwillimbury accounted for 15% of the population in 2001. Collingwood, Wasaga Beach, Midland and Penetanguishene together accounted for 14%; and, the remaining 19% of the population was scattered in smaller communities and rural areas.

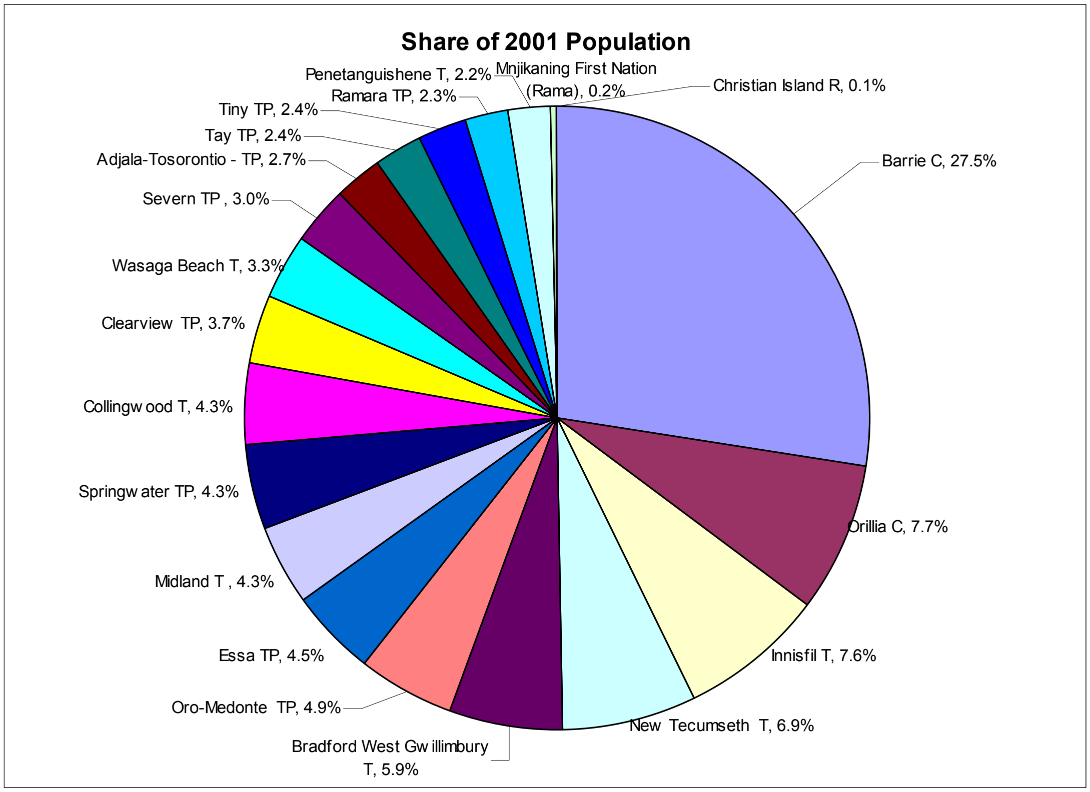

Figure 2

Source: 2001 Census

Table 8: Municipal Populations for Simcoe 2006

Municipality	2006	
	Population	% Of Total
Adjala-Tosorontoio	11,580	2.6%
Barrie	132,270	30.2%
Bradford West Gwillimbury	25,600	5.9%
Clearview	14,450	3.3%
Collingwood	18,530	4.2%
Essa	18,880	4.3%
Innisfil	32,380	7.4%
Midland	16,830	3.8%
New Tecumseh	29,210	6.7%
Orillia	30,000	6.9%
Oro-Medonte	21,170	4.8%
Penetanguishene	8,650	2.0%
Ramara	9,820	2.2%
Severn	12,590	2.9%
Springwater	18,390	4.2%
Tay	9,920	2.3%
Tiny	10,590	2.4%
Wasaga Beach	16,430	3.8%
Simcoe Total	437,290	100.0%

Source: Lapointe Consulting Inc. estimates

2.2.5 Simcoe 2006 Municipal Post-censal Population Estimates

In order to estimate the 2006 population for individual municipalities, we used the 2001 census and updated the data. Municipal populations were estimated by multiplying the estimated households in 2006 by the estimated household size in 2006. The results are shown in Table 8 on the opposite page.

Table A3 in the Appendix provides a summary of how the 2006 municipal population in Simcoe was estimated. The following steps were used to estimate each municipality's population. First, because the Simcoe projections are based on Census 2001 postcensal estimates, the number of households for each municipality in 2001 was increased by the postcensal underestimate for Simcoe of 3.6%. Then household additions for the period 2001 – 2006, based on annual average of dwelling completions between 2001 and 2005 for each municipality, were added to the 2001 postcensal households to come up with the number of households in 2006. Finally, the 2006 households were multiplied by the estimated 2006 household size to estimate the 2006 population for each municipality.

The population estimates for 2006 indicates that Barrie is increasing its share of the study area population going from 27.5% in 2001 to 30.2% in 2006. The only other municipality to increase its share was Wasaga Beach which went from 3.3% in 2001 to 3.8% in 2006.

As a result of these increases, other municipalities decreased. The biggest decline was in Orillia which fell from 7.7% of the population in 2001 to 6.9% in 2001. Other municipalities experienced minor declines in their population.

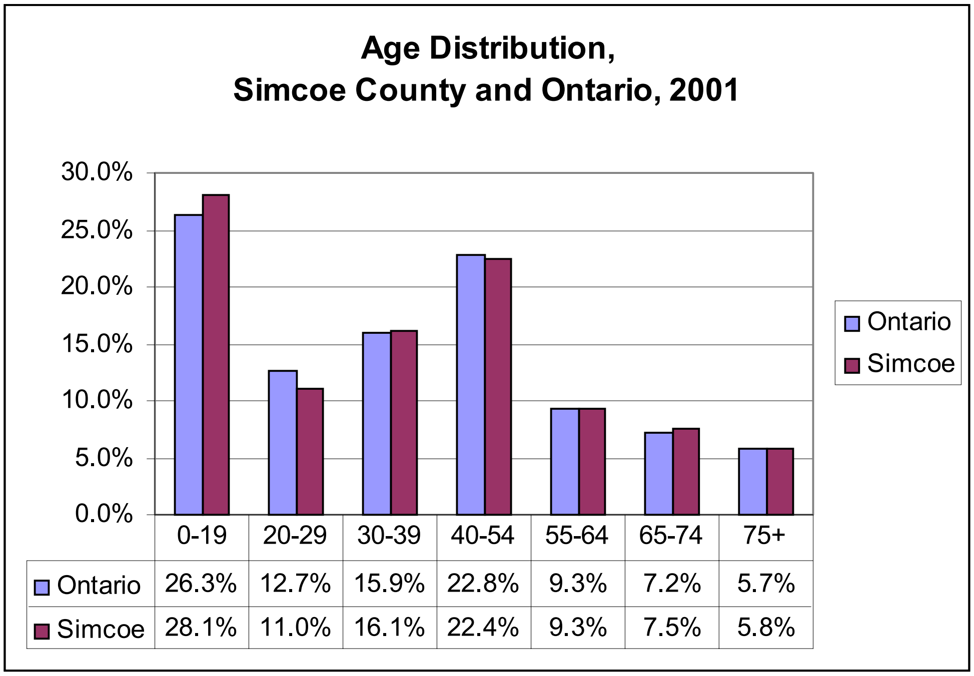

Figure 3

Source: Statistics Canada, 2001 Census

Table 9: Age Distribution, Municipalities in Study Area, 2001

	Adjala-Tosorontio	Clearview	New Tecumseth	Springwater	Bradford West Gwillimbury	Severn	Innisfil	Ramara	Essa	Oro-Medonte
0-19	30.8%	28.6%	28.6%	30.4%	31.0%	25.2%	29.0%	23.6%	32.0%	27.0%
20-29	8.9%	9.3%	10.5%	9.2%	12.5%	8.7%	8.8%	7.5%	10.7%	8.9%
30-39	17.0%	15.1%	17.2%	14.5%	18.2%	13.6%	18.0%	12.8%	19.7%	14.0%
40-54	25.0%	23.0%	21.6%	25.4%	23.1%	23.7%	22.3%	22.0%	23.3%	25.4%
55-64	9.7%	9.6%	8.6%	9.7%	7.6%	12.3%	8.7%	15.1%	7.2%	11.6%
65-74	5.6%	7.6%	7.2%	6.8%	4.5%	10.4%	7.5%	12.8%	4.6%	7.8%
75+	3.0%	6.7%	6.2%	4.0%	3.1%	6.1%	5.7%	6.2%	2.5%	5.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	Collingwood	Barrie	Rama F.N.	Orillia	Wasaga Beach	Tiny	Christian Island	Tay	Penetanguishene	Midland
0-19	24.7%	29.8%	36.3%	25.1%	21.4%	22.8%	43.1%	26.0%	25.1%	25.4%
20-29	10.9%	13.8%	12.9%	11.7%	7.6%	8.6%	14.7%	9.8%	9.8%	10.0%
30-39	12.7%	18.1%	19.4%	13.8%	12.7%	12.2%	14.7%	14.4%	14.2%	12.6%
40-54	21.8%	20.9%	19.4%	22.0%	20.6%	24.9%	17.6%	22.9%	23.4%	22.7%
55-64	11.0%	7.0%	5.6%	9.4%	15.5%	13.2%	5.9%	12.3%	10.7%	10.4%
65-74	10.2%	5.5%	3.2%	8.5%	15.4%	11.8%	2.9%	9.2%	8.6%	9.3%
75+	8.8%	4.8%	3.2%	9.6%	6.8%	6.5%	1.0%	5.4%	8.3%	9.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Statistics Canada, 2001 Census

2.2.6 Age Distribution

The age distribution within Simcoe is very similar to that of Ontario as a whole as shown in Figure 3 on the opposite page. Simcoe has slightly more young persons under 19 years of age and a slightly lower proportion of young adults aged 20-29 years. Otherwise, the age distribution is very similar.

As Table 9 shows, there is considerable variation in the age distribution across Simcoe. The age structure reflects the local population as well as the characteristics of those who are moving into the area. Smaller municipalities with slower growth tend to have an older age structure as younger people move to other locations to get jobs.

More northern municipalities such as Collingwood, Orillia, Wasaga Beach, Penetanguishene and Midland have a higher proportion of their population who are 55+ as many people are retiring to these locations or moving there for lifestyle reasons. The best example of this trend is Wasaga Beach where 38% of the population was 55 years and older in 2001. The attractiveness of these areas to older adults will be taken into account when projecting future housing requirements and population for these communities.

More southern municipalities tend to have higher proportions of young persons under 19 years of age – reflecting the attraction of this area for younger families. First nations' communities have the highest proportions of children.

Barrie, Essa and Bradford West Gwillimbury have high proportions of their population who are younger adults -20-29 years of age and 30-39 years of age. These municipalities tend to have affordable housing options for younger families, provide opportunities for those commuting to nearby employment opportunities and are close to natural recreational outdoor opportunities/facilities. Native communities also have higher younger adults reflecting the higher birth rates in those communities.

An analysis of people moving into Simcoe indicated that a high proportion are young families aged 30-39 years old. Approximately a quarter are 55 years or older.[5] Thus, Simcoe as a whole is attracting younger families with children as well as older adults.

[5] In order to estimate the age distribution of migrants, each age cohort from 1996 was "aged" to the next cohort in 2001. After subtracting deaths calculated using the Ontario mortality table, the difference between natural growth and the 2001 census was estimated to be net migration for that age cohort. The cohort 0-4 is made up of the births between 1996 and 2001 from the population projections in the model.

Table 10: Distribution of Households in 1996 and 2001 Across Simcoe

	1996 Households	% Distribution	2001 Households	% Distribution	Change 1996-2001	% Change in # of Households	Share of Household Ch.
Adjala-Tosorontio	2,995	2.5%	3,300	2.4%	305	10.2%	1.7%
Barrie C	28,415	23.9%	36,855	26.9%	8,440	29.7%	45.9%
Bradford West Gwillimbury T	6,375	5.4%	7,130	5.2%	755	11.8%	4.1%
Christian Island R	175	0.1%	170	0.1%	-5	-2.9%	0.0%
Clearview TP	4,305	3.6%	4,800	3.5%	495	11.5%	2.7%
Collingwood T	6,090	5.1%	6,575	4.8%	485	8.0%	2.6%
Essa TP	5,355	4.5%	5,545	4.0%	190	3.5%	1.0%
Innisfil T	8,740	7.4%	10,195	7.4%	1,455	16.6%	7.9%
Midland T	5,895	5.0%	6,550	4.8%	655	11.1%	3.6%
Mnjikaning First Nation	205	0.2%	210	0.2%	5	2.4%	0.0%
New Tecumseth T	7,920	6.7%	9,275	6.8%	1,355	17.1%	7.4%
Orillia C	10,930	9.2%	11,610	8.5%	680	6.2%	3.7%
Oro-Medonte TP	5,935	5.0%	6,605	4.8%	670	11.3%	3.6%
Penetanguishene T	2,745	2.3%	3,130	2.3%	385	14.0%	2.1%
Ramara TP	3,040	2.6%	3,415	2.5%	375	12.3%	2.0%
Severn TP	3,770	3.2%	4,185	3.1%	415	11.0%	2.3%
Springwater TP	4,870	4.1%	5,350	3.9%	480	9.9%	2.6%
Tay TP	4,110	3.5%	3,470	2.5%	-640	-15.6%	-3.5%
Tiny TP	3,290	2.8%	3,535	2.6%	245	7.4%	1.3%
Wasaga Beach T	3,560	3.0%	5,195	3.8%	1,635	45.9%	8.9%
Total Simcoe	118,720	100.0%	137,100	100.0%	18,380	15.5%	100.0%

Source: Statistics Canada, 2001 Census

Table 11: Household Size, Simcoe and Ontario, 1991, 1996 and 2001

	1991	1996	2001
Adjala-Tosorontio	N/A	3.1	3
Barrie C	2.8	2.8	2.8
Bradford West Gwillimbury T	3.2	3.1	3.1
Christian Island R	4.1	3.2	3
Clearview TP	N/A	2.8	2.8
Collingwood T	2.6	2.5	2.4
Essa TP	3.1	3	3
Innisfil T	2.7	2.8	2.8
Midland T	2.7	2.5	2.4
Mnjikaning First Nation	N/A	2.6	2.8
New Tecumseth T	N/A	2.9	2.8
Orillia C	2.5	2.4	2.4
Oro-Medonte TP	N/A	2.8	2.8
Penetanguishene T	2.7	2.5	2.5
Ramara TP	N/A	2.6	2.5
Severn TP	N/A	2.7	2.6
Springwater TP	N/A	3	3
Tay TP	2.7	2.6	2.6
Tiny TP	2.8	2.6	2.5
Wasaga Beach T	2.4	2.4	2.4
Total Simcoe	2.8	2.7	2.7
Ontario	2.8	2.7	2.7

Source: Statistics Canada, 2001 Census

2.3 HOUSEHOLD TRENDS

2.3.1 Growth in the Number of Households

In this section we examine trends in household growth, household size, tenure and household type. Understanding these trends will help us to project the future population across local municipalities in the next stage of the analysis. Table 10 on the opposite page provides a summary of household growth between 1996 and 2001 across the study area. A comparison of shares of household growth and population growth in 1996-2001 shows the predominant position of Barrie which accounted for 52% of Simcoe's population change and 46% of household change. Other municipalities had low or negative population growth but higher household growth (e.g., Midland, Penetanguishene, Collingwood). These municipalities tend to have higher proportions of their population who are older. As populations age, they may have positive household growth even though the population may not grow. For example, as families move through different life cycles, they form additional households although the population may remain constant or actually decline as some younger people move out of a given area to find employment or to pursue a secondary education.

2.3.2 Household Size

Table 11 compares household sizes in Simcoe, individual municipalities and Ontario. Simcoe's household size has been identical to that of Ontario's since 1991 and there was little change between 1996 and 2001.

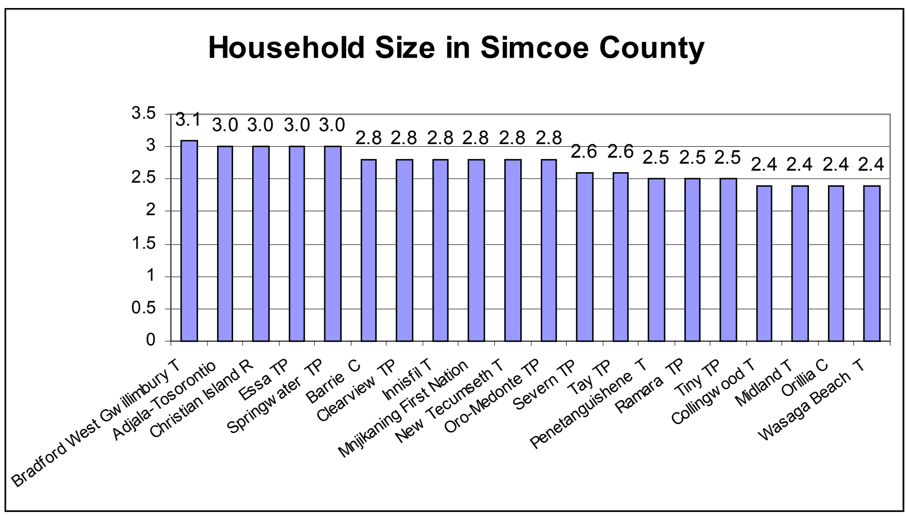

Figure 4

There is considerable variation within Simcoe in household sizes with smaller household sizes generally found in more northern municipalities, municipalities with older age structures. Municipalities north of Toronto and in the Barrie area have household sizes that range between 2.8 to 3.1 persons per household – illustrating the attractiveness of these areas to younger families. As with Simcoe as a whole, there has been only a gradual decline in average household size in various municipalities between 1991 and 2001. We will be forecasting future household size for the larger Simcoe area and individual municipalities in the Growth Potential Assessment report.

Table 12: Tenure of Dwelling Units, 2001

	Owned		Rented		Total	
	#	%	#	%	#	%
Adjala-Tosorontio - TP	2,895	87.7%	405	12.3%	3,300	100.0%
Barrie C	26,535	72.0%	10,315	28.0%	36,850	100.0%
Bradford West Gwillimbury T	5,675	79.6%	1,455	20.4%	7,130	100.0%
Christian Island R	110	73.3%	40	26.7%	150	100.0%
Clearview TP	4,155	86.6%	645	13.4%	4,800	100.0%
Collingwood T	4,655	70.9%	1,915	29.1%	6,570	100.0%
Essa TP	3,995	72.0%	1,550	28.0%	5,545	100.0%
Innisfil T	9,290	91.1%	910	8.9%	10,200	100.0%
Midland T	4,425	67.6%	2,125	32.4%	6,550	100.0%
Mnjikaning First Nation	125	80.6%	30	19.4%	155	100.0%
New Tecumseth T	7,755	83.6%	1,520	16.4%	9,275	100.0%
Orillia C	7,345	63.3%	4,265	36.7%	11,610	100.0%
Oro-Medonte TP	6,030	91.3%	575	8.7%	6,605	100.0%
Penetanguishene T	2,220	70.9%	910	29.1%	3,130	100.0%
Ramara TP	3,085	90.3%	330	9.7%	3,415	100.0%
Severn TP	3,740	89.4%	445	10.6%	4,185	100.0%
Springwater TP	4,655	87.0%	695	13.0%	5,350	100.0%
Tay TP	3,145	90.5%	330	9.5%	3,475	100.0%
Tiny TP	3,210	90.7%	330	9.3%	3,540	100.0%
Wasaga Beach T	4,475	86.1%	720	13.9%	5,195	100.0%
IGAP STUDY AREA	107,520	78.5%	29,510	21.5%	137,030	100.0%

Source: Statistics Canada, 2001 Census

3 TRENDS IN TENURE AND HOUSING PREFERENCES

3.1 TENURE

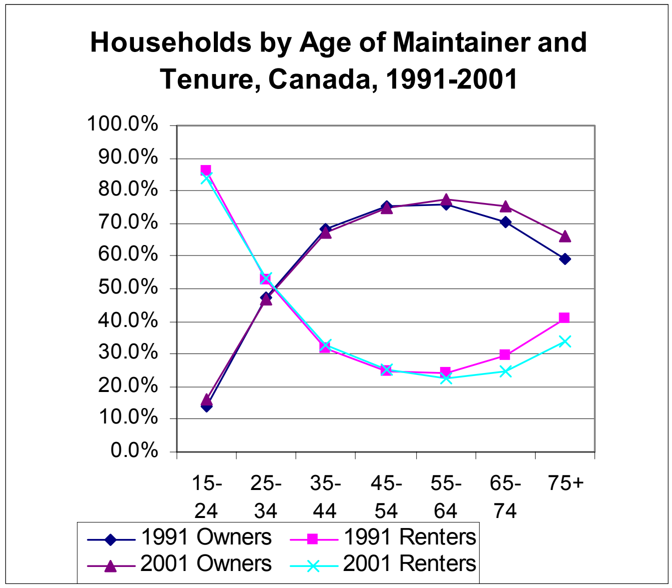

Figure 5

Source: Prepared by Lapointe Consulting Using CMHC Data

As Figure 5 shows, tenure preferences are directly related to age with higher proportions of households where the household maintainer is younger and older having the highest likelihood of renting. Between 1991 and 2001, there has been an increased tendency in age groups 55 and over to own their own dwelling. This is probably a reflection of the increasing supply of condominium apartments or other condominium house forms for older adults that provide older adults with more housing that is easier to maintain and more suited to their life style. For example, in 2001 almost a third of condominium owners were households led by seniors (65 or older) while nearly half were households maintained by people 55 or older. As the leading edge of the baby boom generation are entering their 60's, these trends will have an enormous impact on the kind of housing that is required in the future. .[6] At the same time, the aging of the population can be expected to increase demand for more affordable, rental housing to suit the needs of those on fixed incomes

Overall within Simcoe County, 78.5% of housing units are owned and 21.5% are rented (see Table 12 and 13). The highest proportion of rented housing is in the urban areas such as Orillia, Barrie, Collingwood and Penetanguishene where between 29 to 36% of units are rented. A more detailed analysis of dwelling type by tenure from the 2001 census shows that a substantial portion of Simcoe's rental housing is in the form of rented single family homes accounting for almost a third of rented housing. Refer to Table 13 on the next page.

[6] Canada Mortgage and Housing Corporation, Canadian Housing Observer 2004, pages 21-23 and Canadian Housing Observer 2005, pages 15-17

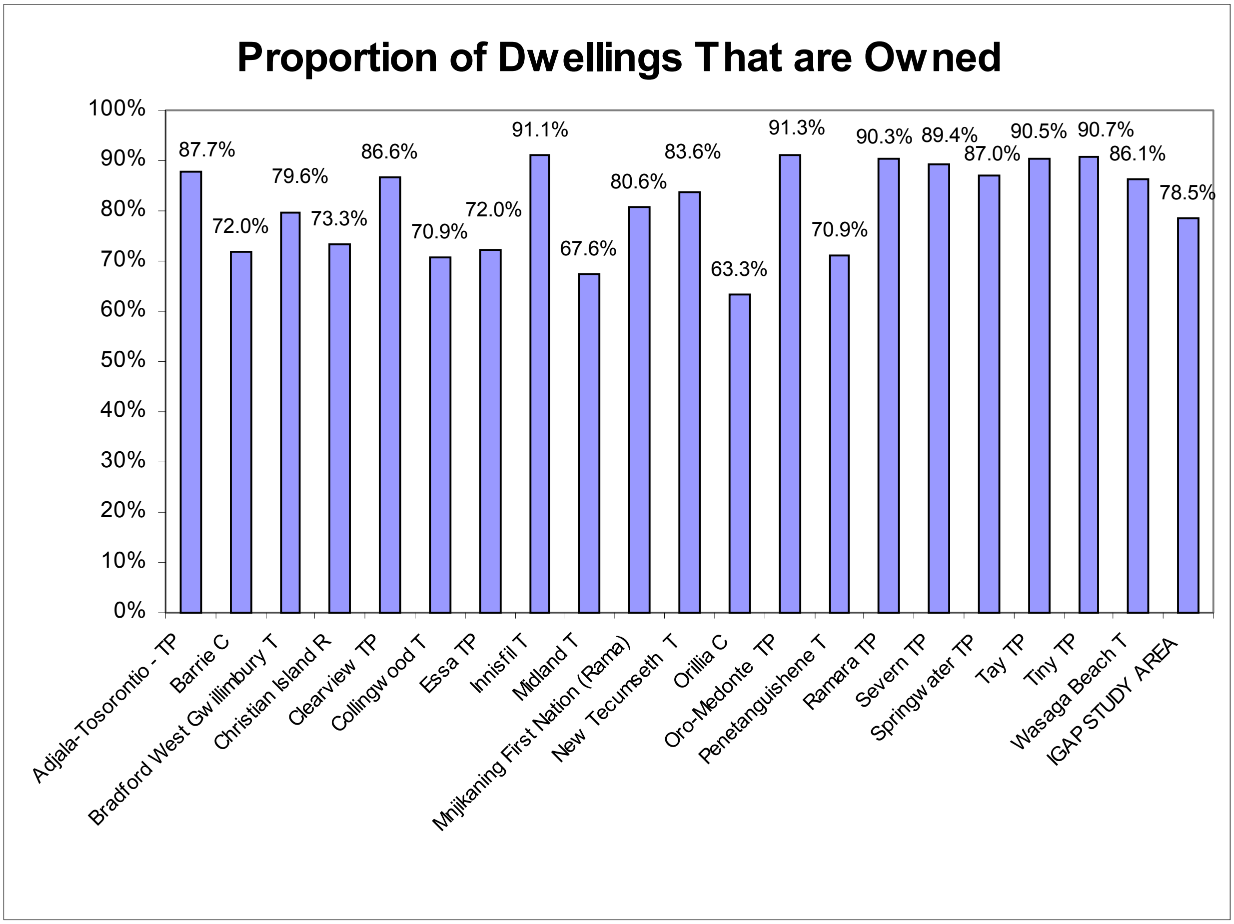

Figure 6

Source: 2001 Census, Statistics Canada

Table 13: Dwelling Type by Tenure, Simcoe County, 2001

	Owned	Rented	Total
Single Detached	96,585	9,095	105,680
	91.4%	*8.6%*	*100.0%*
Semi-Detached/Duplex	4,560	3,965	8,525
	53.5%	*46.5%*	*100.0%*
Row Housing/Other Attached	4,005	2,635	6,640
	60.3%	*39.7%*	*100.0%*
Apartments	2,360	13,845	16,205
	14.6%	*85.4%*	*100.0%*
Total	107,510	29,540	137,050
	78.4%	*21.6%*	*100.0%*

Source: Custom Tabulation from Statistics Canada, 2001 Census

3.2 DWELLING TYPE PREFERENCES

A custom tabulation was obtained from Statistics Canada on housing preferences by dwelling type. The data was provided for Simcoe as a whole rather than on an municipal basis.[7]

Table 14 below shows that there is a strong demand for apartments among younger households and older households. As the population ages, there will be an increasing demand for apartments and other forms of housing oriented to seniors such as smaller singles and attached housing. It must be kept in mind that the housing preferences shown below tend to reflect fairly traditional housing choices in the Simcoe area whereas as we have seen across most of Southern Ontario and in many municipalities in the GTA, there is an increasing demand for higher density housing for empty nesters, early retirees and seniors. In the Growth Potential Assessment report, we will use data from housing preferences in Simcoe, Ontario and the GTA to estimate future housing choices in Simcoe.

Table 14: Dwelling Type Choices in Simcoe by Age of Household Maintainer, 2001

Age groups of primary household maintainer	Single Detached (incl. Moveable)		Semi-detached		Row+other att.		Apartments (including duplexes)		Total	
	#	%	#	%	#	%	#	%	#	%
15-24	1,180	33.1%	215	6.0%	335	9.4%	1,840	51.5%	3,570	100.0%
25-34	13,695	67.7%	1,070	5.3%	1,585	7.8%	3,870	19.1%	20,220	100.0%
35-44	28,670	80.4%	1,655	4.6%	1,855	5.2%	3,480	9.8%	35,660	100.0%
45-54	23,240	82.7%	1,060	3.8%	1,135	4.0%	2,670	9.5%	28,105	100.0%
55-64	15,895	82.5%	500	2.6%	690	3.6%	2,180	11.3%	19,265	100.0%
65-74	13,605	79.8%	480	2.8%	625	3.7%	2,330	13.7%	17,040	100.0%
75-84	7,960	72.6%	155	1.4%	355	3.2%	2,495	22.8%	10,965	100.0%
85 +	1,525	64.6%	40	1.7%	85	3.6%	710	30.1%	2,360	100.0%
Total	105,745	77.1%	5,180	3.8%	6,655	4.9%	19,560	14.3%	137,140	100.0%

Source: Custom Tabulation from Statistics Canada, 2001 Census

[7] As per the Provincial Projection Methodology Guideline, 1995, we needed housing propensities by age of head of the household (household maintainer), that is the proportion of each age group who owned and rented and who lived in different dwelling types. This data is then used to project housing requirements based on current housing preferences. The resulting housing requirements and adjustments that were made to the required housing mix are included as an Appendix to the Growth Potential Assessment Report.

Table 15: Distribution of Employment, Simcoe, 1996 and 2001

Industry	1996 Employed	% Total	2001 Employed	% Total	1996-2001 Change	% Change	Share of Simcoe Change
Primary industries	1,705	1.7%	1,690	1.4%	-15	-0.9%	-0.1%
Manufacturing industries	19,075	19.1%	25,145	20.3%	6,070	31.8%	25.1%
Construction	2,770	2.8%	4,185	3.4%	1,415	51.1%	5.8%
Transportation and storage	2,590	2.6%	3,775	3.0%	1,185	45.8%	4.9%
Wholesale and retail	20,340	20.4%	23,430	18.9%	3,090	15.2%	12.8%
Finance, insurance, real estate	4,615	4.6%	5,265	4.2%	650	14.1%	2.7%
Government services	7,245	7.3%	8,035	6.5%	790	10.9%	3.3%
Educational services	7,355	7.4%	7,930	6.4%	575	7.8%	2.4%
Health and social services	11,635	11.7%	12,920	10.4%	1,285	11.0%	5.3%
Accommodation, food and beverage	9,260	9.3%	11,260	9.1%	2,000	21.6%	8.3%
Other Services	13,225	13.2%	20,370	16.4%	7,145	54.0%	29.5%
Total - Industry divisions	99,815	100.0%	124,005	100.0%	24,190	24.2%	100.0%

Source: Statistics Canada, 1996 and 2001 Census

Table 16: Employment by Municipality, 1996 and 2001

Industry	1996 Employed	% Total	2001 Employed	% Total	1996-2001 Change	% Change	Share of Simcoe Change
Primary industries	1,705	1.7%	1,690	1.4%	-15	-0.9%	-0.1%
Manufacturing industries	19,075	19.1%	25,145	20.3%	6,070	31.8%	25.1%
Construction	2,770	2.8%	4,185	3.4%	1,415	51.1%	5.8%
Transportation and storage	2,590	2.6%	3,775	3.0%	1,185	45.8%	4.9%
Wholesale and retail	20,340	20.4%	23,430	18.9%	3,090	15.2%	12.8%
Finance, insurance, real estate	4,615	4.6%	5,265	4.2%	650	14.1%	2.7%
Government services	7,245	7.3%	8,035	6.5%	790	10.9%	3.3%
Educational services	7,355	7.4%	7,930	6.4%	575	7.8%	2.4%
Health and social services	11,635	11.7%	12,920	10.4%	1,285	11.0%	5.3%
Accommodation, food and beverage	9,260	9.3%	11,260	9.1%	2,000	21.6%	8.3%
Other Services	13,225	13.2%	20,370	16.4%	7,145	54.0%	29.5%
Total - Industry divisions	99,815	100.0%	124,005	100.0%	24,190	24.2%	100.0%

Source: 1996 and 2001 Census

4 EMPLOYMENT CHARACTERISTICS

In this section we review the characteristics of employment (jobs) in Simcoe as well as categories of employment that are growing/declining. Labour force trends are also examined, that is the employment characteristics of the residential population in Simcoe and local communities. Commuting trends are also examined. Finally, we briefly discuss the employment projections that we will be using in the Growth Potential Assessment report.

4.1 EMPLOYMENT – BY SECTOR AND MUNICIPALITY

Table 15 on the opposite page shows the distribution of employment in Simcoe by industry category in 1996 and 2001. The largest employment categories in Simcoe are:

- Manufacturing (20.3% of jobs)
- Wholesale and retail trade (18.9% of jobs)
- Other services (16.4%)[8]
- Health and social services (10.4%)
- Accommodation, food and beverage (9.1%).

However, not all jobs are equal in that manufacturing has the largest multiplier effect in terms of generating additional jobs elsewhere in the economy and jobs in this sector tend to be higher paid than some of the lower paying service sector jobs – although some of those are high paying as well.

Between 1996 and 2001, the number of jobs in Simcoe grew from 99,815 to 124,005 – an increase of 24,190 jobs. Manufacturing jobs accounted for 25.1% of the increase, followed by other services (29.5%), wholesale and retail (12.8%) and accommodation, food and beverage (8.3%).

Table 16 shows the distribution of jobs in 1996 and 2001 by municipality. The major locations for employment are:

- Barrie (34.3% of jobs);
- New Tecumseth (11.5% of jobs);
- Orillia (11.2% of jobs);
- Midland (7.3% of jobs), and,
- Collingwood (7.3% of jobs).

[8] In 2001, "other services" included "information and cultural industries", "professional, scientific and technical services", "management of companies and enterprises", "administrative and support, waste management and remediation services", "arts, entertainment and recreation" and "other services".

Table 17: Distribution of Employment by Category and Share of Simcoe Employment, Simcoe and Local Municipalities, 2001

	Primary			Service			Industrial			Institutional			Total		
Municipality	#	% of Simcoe	% of Mun.	#	% of Simcoe	% of Mun.	#	% of Simcoe	% of Mun.	#	% of Simcoe	% of Mun.	#	% of Simcoe	Total
Adjala-Tosorontio	100	5.9%	18.7%	275	0.4%	51.4%	45	0.1%	8.4%	115	0.6%	21.5%	535	0.4%	100.0%
Clearview	125	7.4%	5.5%	1,105	1.6%	49.0%	545	1.6%	24.2%	480	2.3%	21.3%	2,255	1.8%	100.0%
New Tecumseth	225	13.3%	1.6%	4,550	6.7%	31.8%	8,080	24.4%	56.4%	1,470	7.1%	10.3%	14,325	11.6%	100.0%
Springwater	95	5.6%	3.5%	1,525	2.2%	55.9%	505	1.5%	18.5%	605	2.9%	22.2%	2,730	2.2%	100.0%
Bradford West Gwillimbury	295	17.5%	6.0%	2,305	3.4%	46.9%	1,565	4.7%	31.9%	745	3.6%	15.2%	4,910	4.0%	100.0%
Severn	110	6.5%	4.7%	1,625	2.4%	69.4%	410	1.2%	17.5%	195	0.9%	8.3%	2,340	1.9%	100.0%
Innisfil	160	9.5%	4.1%	2,480	3.6%	64.2%	795	2.4%	20.6%	425	2.0%	11.0%	3,860	3.1%	100.0%
Ramara	45	2.7%	3.8%	790	1.2%	67.5%	260	0.8%	22.2%	75	0.4%	6.4%	1,170	0.9%	100.0%
Essa	125	7.4%	2.3%	4,570	6.7%	84.2%	415	1.3%	7.6%	320	1.5%	5.9%	5,430	4.4%	100.0%
Oro-Medonte	100	5.9%	4.4%	1,250	1.8%	54.9%	725	2.2%	31.9%	200	1.0%	8.8%	2,275	1.8%	100.0%
Collingwood	35	2.1%	0.4%	4,595	6.7%	50.6%	2,955	8.9%	32.5%	1,505	7.2%	16.6%	9,090	7.3%	100.0%
Barrie	115	6.8%	0.3%	25,345	37.2%	59.6%	9,120	27.5%	21.4%	7,945	38.1%	18.7%	42,525	34.3%	100.0%
Rama First Nation 32	10	0.6%	0.4%	2,680	3.9%	96.8%	50	0.2%	1.8%	30	0.1%	1.1%	2,770	2.2%	100.0%
Orillia	35	2.1%	0.3%	8,150	11.9%	58.7%	2,230	6.7%	16.1%	3,470	16.6%	25.0%	13,885	11.2%	100.0%
Wasaga Beach	25	1.5%	1.6%	1,205	1.8%	75.1%	125	0.4%	7.8%	250	1.2%	15.6%	1,605	1.3%	100.0%
Tiny	30	1.8%	5.4%	375	0.5%	67.6%	115	0.3%	20.7%	35	0.2%	6.3%	555	0.4%	100.0%
Christian Island 30	0	0.0%	0.0%	40	0.1%	44.4%	10	0.0%	11.1%	40	0.2%	44.4%	90	0.1%	100.0%
Tay	10	0.6%	1.2%	470	0.7%	57.0%	200	0.6%	24.2%	145	0.7%	17.6%	825	0.7%	100.0%
Penetanguishene	15	0.9%	0.4%	1,010	1.5%	27.1%	1,450	4.4%	38.9%	1,255	6.0%	33.6%	3,730	3.0%	100.0%
Midland	35	2.1%	0.4%	3,865	5.7%	43.2%	3,505	10.6%	39.2%	1,545	7.4%	17.3%	8,950	7.2%	100.0%
Simcoe Total	1,690	100.0%	1.4%	68,210	100.0%	55.1%	33,105	100.0%	26.7%	20,850	100.0%	16.8%	123,855	100.0%	100.0%

Source: Place of Work data from Statistics Canada, 2001 Census

Between 1996 and 2001, the municipalities that accounted for most of the increase in jobs in Simcoe were:

- Barrie (30.5% of the increase in jobs in Simcoe);
- New Tecumseth (24.5%);
- Rama First Nation (10.2%);
- Collingwood (9.5%);
- Bradford West Gwillimbury (6.5%); and,
- Innisfil (4.9%).

Table 17 on the opposite page provides a summary of the distribution of jobs by municipality and by sector of employment – primary, industrial, service and institutional/office.

In terms of industrial employment, the most important locations are:

- Barrie (27.5% of Simcoe's industrial employment);
- New Tecumseth (24.4%);
- Midland (10.6%);
- Collingwood (8.9%);
- Orillia (6.5%);
- Bradford-West Gwillimbury (4.7%), and,
- Penetanguishene (4.4%).

Service employment is scattered across the study area although clearly some municipalities have more service jobs than are warranted by their population and this is due to the fact that they are tourist areas and have seasonal residents (e.g. Wasaga Beach, or have a specific service (e.g., Casino Rama). An alternative explanation for some municipalities is that there is no industrial employment and so service sector jobs are relatively more important to the local economy.

Institutional employment is generally proportional to the population except for Orillia and Penetanguishene (which have specific large institutional employers, e.g., penitentiary facilities).

Table 18: Ratio of Jobs: Population, Simcoe and Area Municipalities, 2001

Municipality	2001 Population	Jobs	Jobs: Pop. Ratio
Adjala-Tosorontio - TP	10,082	535	0.1
Barrie C	103,710	42,515	0.4
Bradford West Gwillimbury T	22,228	4,910	0.2
Christian Island R	515	100	0.2
Clearview TP	13,796	2,230	0.2
Collingwood T	16,039	9,090	0.6
Essa TP	16,808	5,425	0.3
Innisfil T	28,666	3,860	0.1
Midland T	16,214	9,095	0.6
Mnjikaning First Nation (Rama	597	2,785	4.7
New Tecumseth T	26,141	14,315	0.5
Orillia C	29,121	13,880	0.5
Oro-Medonte TP	18,315	2,275	0.1
Penetanguishene T	8,316	3,730	0.4
Ramara TP	8,615	1,170	0.1
Severn TP	11,135	2,345	0.2
Springwater TP	16,104	2,730	0.2
Tay TP	9,162	820	0.1
Tiny TP	9,035	545	0.1
Wasaga Beach T	12,419	1,595	0.1
Total	377,018	123,950	0.3

Source: Lapointe Consulting using data from Statistics Canada, 2001 Census

Table 18 on the opposite page shows the ratio of jobs to the 2001 population. The overall ratio in Simcoe is .3 with the highest ratio being in Mnjikaning First Nation (Rama) where there are 4.7 jobs for each resident. Collingwood and Midland each have ratios of .6 jobs per resident while Orillia and New Tecumseth have .5 jobs per resident. Even though Barrie has the largest share of jobs in Simcoe, it has a jobs:resident ratio of .4 reflecting its higher proportion of commuters compared to Orillia and New Tecumseth (the home of Alliston's Honda plants). A number of municipalities have low jobs per resident ratios reflecting their more rural location and in some cases their function as a primarily suburban housing market (e.g., Innisfil).

4.2 LABOUR FORCE

As shown in Table 19 Simcoe had a well diversified labour force in 2001. The largest categories of the labour force were:

- Manufacturing (18%);
- The retail trade (12%);
- Health care and social services (9%); and,
- Construction (8%).

Seven per cent (7%) of the labour force were employed in the hospitality industry (accommodation and food). Other significant categories of the labour force include: public administration (6%), educational services (5%), transportation and warehousing (5%) and wholesale trade (5%).

While other industries represented smaller shares of the labour force, they employed nearly 10,000 persons. These smaller sectors include: the professional, science and technology industry (4% of labour force), administration waste and remediation (4%), and the arts, entertainment and recreation industry (3%).

The distribution of the labour force among the municipalities is shown in Table A3 in the Appendix. The majority of the labour force working in manufacturing in Simcoe resides in Barrie, New Tecumseh, Bradford and Innisfil. Although Barrie had the most manufacturing workers living in its borders (9,200), this category only accounted for 16% of the labour force compared to 20%, who were employed in manufacturing in Collingwood (where only 1,600 members of the labour force worked in manufacturing).

Collingwood also had the highest percentage of its labour force working in the hospitality industry - 12% were employed in this industry compared to 6% for Simcoe as a whole.

**Table 19: Distribution of Labour Force by Employment Category, 2001
Simcoe**

Industry	Simcoe	% of Total
Agriculture, forestry, fishing & hunting	4,370	2.2%
Mining, oil & gas	305	0.2%
Utilities	1,235	0.6%
Construction	15,365	7.9%
Manufacturing	34,715	17.7%
Wholesale trade	9,170	4.7%
Retail trade	24,215	12.4%
Transport and warehousing	9,690	5.0%
Information & culture	3,705	1.9%
Finance and insurance	4,935	2.5%
Real estate, rental & leasing	3,425	1.8%
Professional, science & technology	8,485	4.3%
Management	50	0.0%
Administration, waste & remediation	8,265	4.2%
Educational services	10,305	5.3%
Health care & social assistance	17,760	9.1%
Arts, entertainment & recreation	6,270	3.2%
Accommodation & food	13,365	6.8%
Other services	8,900	4.5%
Public administration	11,175	5.7%
Total	195,705	100.0%

Source: Statistics Canada, 2001 Census

Residents employed in agriculture tended to live in Adjala, Clearview, Springwater, Bradford, Oro-Medonte, Tiny and Tay. A more detailed discussion of agriculture and its importance to the whole region is found in Wayne Caldwell's report on rural and agricultural development potential.

For most other industry categories the labour force seemed to be fairly evenly distributed across municipalities.

Essa had the highest number (2,040) and percentage (22%) who worked in public administration – being the centre for Simcoe County's administration as well as providing other municipal offices, the County museum and the Simcoe Board of Education. For all of Simcoe 6% were employed in public administration.

4.3 COMMUTING PATTERNS

Table 20 on the following page shows the commuting patterns of Simcoe County's employed labour force in 2001. Only commuters, who accounted for 149,500 of the employed labour force, are included in the table. Those who worked at home or who had no fixed work place address, such as contract workers are excluded. These two categories accounted for about 34,000, while another 500 persons reported that they worked outside of Canada.

Most residents of Simcoe (75.4%) in 2001 also worked there. Another 23.4% of residents worked in other areas of the GTA. Only 1.2% worked in other parts of Ontario or Canada.

Almost 42% of commuters worked in the municipality in which they resided. Another 33.6% worked in other areas of Simcoe. Most commuters who found employment in the GTA commuted to York Region (10.2%). Commuters to Toronto accounted for another 8.4%, while those employed in Peel accounted for 4.5%. In 2001, less than 1% of Simcoe residents commuted to Halton and Durham for work.

The greatest opportunity for residents to find employment within their place of residence was found in Barrie, where 61.3% were employed locally, Collingwood (79.2%), Midland (67.3%), and Orillia (64.6%). Other municipalities with significant local employment opportunities were New Tecumseth, where 42.5% of residents found employment in the municipality, and Penetanguishene, where 44% residents worked in the municipality.

Residents most likely to commute to work outside of Simcoe came from Bradford West Gwillimbury, where just over 50% commuted to York Region, Innisfil with 27% of commuters working in York Region and 16% in Toronto, New Tecumseh with 16% working in York Region and 18% in Toronto. By comparison 23% of Barrie residents commute outside of Simcoe for work.

Table 20: Place of Work by Place of Residence, Simcoe, 2001

Place of Residence	Place of Work																		
	Place of Residence		Other Simcoe		York		Toronto		Peel		Durham		Halton		GTA		Other		Total
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	
Adjala-Tosorontio	245	5.9%	1,925	46.4%	305	7.3%	625	15.1%	895	21.6%			30	0.7%	1,855	44.7%	125	3.0%	4,150
Barrie	27,005	61.3%	6,945	15.8%	3,870	8.8%	4,180	9.5%	1,605	3.6%	40	0.1%	80	0.2%	9,775	22.2%	320	0.7%	44,045
Bradford West Gwillimbury	2,180	21.8%	565	5.6%	5,030	50.3%	1,645	16.4%	585	5.8%					7,260	72.6%			10,005
Christian Island	95			0.0%															95
Clearview	1,305	24.8%	3,265	62.1%	65	1.2%	195	3.7%	165	3.1%			25	0.5%	450	8.6%	235	4.5%	5,255
Collingwood	4,745	79.2%	565	9.4%	35	0.6%	110	1.8%	85	1.4%					230	3.8%	450	7.5%	5,990
Essa	2,785	38.3%	3,250	44.7%	445	6.1%	540	7.4%	245	3.4%					1,230	16.9%			7,265
Innisfil	1,845	16.6%	3,920	35.2%	3,020	27.1%	1,775	15.9%	575	5.2%					5,370	48.2%			11,135
Midland	4,015	67.3%	1,815	30.4%			60	1.0%	20	0.3%					80	1.3%	55	0.9%	5,965
Mnjikaning																			-
New Tecumseth	4,675	42.5%	810	7.4%	1,745	15.9%	1,975	18.0%	1,720	15.6%			25	0.2%	5,465	49.7%	45	0.4%	10,995
Orillia	7,290	64.6%	3,390	30.1%	190	1.7%	145	1.3%	65	0.6%	30	0.3%			430	3.8%	170	1.5%	11,280
Oro-Medonte	815	11.4%	5,570	78.2%	165	2.3%	355	5.0%	170	2.4%					690	9.7%	45	0.6%	7,120
Penetanguishene	1,325	44.0%	1,685	56.0%															3,010
Ramara	490	17.4%	1,800	63.9%	110	3.9%	170	6.0%	25	0.9%	120	4.3%			425	15.1%	100	3.6%	2,815
Severn	780	19.4%	2,895	72.0%			155	3.9%	50	1.2%					205	5.1%	140	3.5%	4,020
Springwater	1,000	16.4%	4,415	72.4%	220	3.6%	335	5.5%	100	1.6%			25	0.4%	680	11.2%			6,095
Tay	405	12.9%	2,620	83.6%	30	1.0%	50	1.6%		0.0%					80	2.6%	30	1.0%	3,135
Tiny	355	11.2%	2,750	86.5%			75	2.4%							75	2.4%			3,180
Wasaga Beach	1,085	27.5%	2,050	51.9%	50	1.3%	195	4.9%	465	11.8%					710	18.0%	105	2.7%	3,950
Total	62,440	41.8%	50,235	33.6%	15,280	10.2%	12,585	8.4%	6,770	4.5%	190	0.1%	185	0.1%	35,010	23.4%	1820	1.2%	149,505

Source: Based on data obtained from Statistics Canada, 2001 Census, by Will Dunning Inc.

5 PROJECTED POPULATION, HOUSEHOLD AND EMPLOYMENT GROWTH

In this section we discuss the projected population for Simcoe as a whole. The population projections that are being used are those that are used in the *Growth Plan for the Greater Golden Horseshoe, 2006 Report.*

5.1 PROJECTED POPULATION BY AGE

The projected age distribution shown in Table 21 on page 36 is based on population projections contained in the Growth Plan for the Greater Golden Horseshoe, 2006 Report reflecting the Reference Scenario. Changes of note in the age distribution over the period 2001-2031 are:

- The proportion of the population composed of children and youth (0-19 years of age) is projected to decline from 28% of the population in 2001 to 22% in 2031. In 2001 there were 109,100 persons under the age of 20; by 2031 there will be 143,500 persons under the age of 20. Though this represents an absolute increase of 34,400 and a 32% rise in this demographic, as a proportion of the total population persons under the age of 20 will be less significant in 2031 than in 2001.

- The proportion of the population composed of adults aged 20-44 is projected to decline from 37% in 2001 to 31% in 2031, although in absolute numbers this group is expected to grow by 62,100 or by 43% from 144,100 in 2001 to 206,200 in 2031.

- Those aged 45-64 years of age are expected to increase from 88,300 persons in 2001 to 168,500 in 2031—representing an increase of 91%, or some 80,200 persons. This group will grow from 23% of the population in 2001 to 25% in 2031. An increase in this age group should result in continued household growth and demand for “move up”, “move down” and “life-style” housing. This cohort will be the fastest growing age group in Simcoe after seniors 65+ between 2001 and 2031.

- The proportion of persons aged 65 years and over is expected to nearly double from 13% of the population in 2001 to 22% in 2031. Those aged 65 and over will almost triple in number from 50,500 in 2001 to 149,000 in 2031, representing a gain of 98,500 persons in this age group and an increase of 195%. Growth in this cohort will account for over a third of the entire population increase in Simcoe between 2001 and 2031.

The aging of the population will have significant impacts on housing demand and services across Simcoe. Trends in Simcoe mirror those that are occurring throughout Ontario and represents a major challenge in terms of how housing and communities are planned and designed in the future. As well, there will be an increased need for health care services and improved community support services.

Table 21: Simcoe Projected Age Distribution 2001-2031

Age	2001		2011		2021		2031		30-Year Change	
	Total	%	Total	%	Total	%	Total	%	#	%
0-4	23,900	6.1%	26,300	5.4%	32,300	5.5%	33,500	5.0%	9,600	40.2%
5-9	29,100	7.4%	27,000	5.6%	32,200	5.5%	36,600	5.5%	7,500	25.8%
10-14	29,400	7.5%	28,900	6.0%	31,500	5.4%	37,300	5.6%	7,900	26.9%
15-19	26,700	6.8%	33,200	6.9%	31,300	5.4%	36,100	5.4%	9,400	35.2%
0-19	109,100	27.8%	115,400	23.8%	127,300	21.9%	143,500	21.5%	34,400	31.5%
20-24	22,600	5.8%	32,600	6.7%	32,300	5.5%	34,700	5.2%	12,100	53.5%
25-29	23,300	5.9%	30,900	6.4%	37,600	6.5%	35,300	5.3%	12,000	51.5%
30-34	27,700	7.1%	31,200	6.4%	41,500	7.1%	40,500	6.1%	12,800	46.2%
35-39	36,400	9.3%	33,500	6.9%	41,400	7.1%	47,300	7.1%	10,900	29.9%
40-44	34,100	8.7%	34,900	7.2%	38,600	6.6%	48,400	7.3%	14,300	41.9%
20-44	144,100	36.8%	163,100	33.7%	191,400	32.9%	206,200	30.9%	62,100	43.1%
45-49	28,100	7.2%	40,700	8.4%	38,000	6.5%	45,600	6.8%	17,500	62.3%
50-54	24,600	6.3%	36,600	7.6%	37,500	6.4%	41,100	6.2%	16,500	67.1%
55-59	19,700	5.0%	30,800	6.4%	43,200	7.4%	40,600	6.1%	20,900	106.1%
60-64	15,900	4.1%	28,700	5.9%	40,600	7.0%	41,200	6.2%	25,300	159.1%
45-64	88,300	22.5%	136,800	28.2%	159,300	27.4%	168,500	25.3%	80,200	90.8%
65-69	14,900	3.8%	23,200	4.8%	34,100	5.9%	45,500	6.8%	30,600	205.4%
70-74	13,500	3.4%	16,700	3.4%	28,400	4.9%	38,900	5.8%	25,400	188.1%
75-79	10,600	2.7%	12,900	2.7%	20,000	3.4%	28,900	4.3%	18,300	172.6%
80-84	6,600	1.7%	9,000	1.9%	11,800	2.0%	20,100	3.0%	13,500	204.5%
85-89	3,300	0.8%	5,100	1.1%	7,000	1.2%	11,200	1.7%	7,900	239.4%
90+	1,600	0.4%	2,100	0.4%	3,100	0.5%	4,400	0.7%	2,800	175.0%
65+	50,500	12.9%	69,000	14.2%	104,400	17.9%	149,000	22.3%	98,500	195.0%
Total	392,000	100.0%	484,300	100.0%	582,400	100.0%	667,200	100.0%	275,200	70.2%

Source: Hemson Consulting and the Ministry of Public Infrastructure and Renewal

Table 22: Household Forecasts, Simcoe, 2006-2031

		5-Year Change		Annual
Year	Hhlds	#	%	#
2001	141,979			
2006	162,245	20,266	14.3%	4,053
2011	184,669	22,425	13.8%	4,485
2016	208,187	23,518	12.7%	4,704
2021	231,836	23,649	11.4%	4,730
2026	253,021	21,185	9.1%	4,237
2031	271,302	18,281	7.2%	3,656

Source: Lapointe Consulting

Population forecasts for individual municipalities will be derived by applying projected household sizes to their future projected total housing.

5.2 PROJECTED HOUSEHOLDS BY AGE OF HOUSEHOLD MAINTAINER

Table 22 shows the projected number of households in Simcoe between 2001 and 2031. In the five-year period, 2006-2011, the annual rate of household growth is estimated to be approximately 4,500 which rises to approximately 4,700 in the following two periods, 2011-2016 and 2016-2021. The rate of household growth is forecasted to decline after 2021 to 4,200 annually between 2021-26 and to 3,700 for the 2026-2031 period.

Tables 23 and 24 show the change in Simcoe in the number of households by age of household maintainer. During the 2006-2011 period, 58% of growth is in the 45-64 year age bracket, representing the front end of the baby boom generation. As this bulge moves forward in subsequent years, the impact on housing demand can be seen. For example, between 2011-2021, 46% of the increase in households will be among those headed by someone 65 years or older. At the same time, as a result of in-migration into Simcoe, households headed by younger age groups, those under 44, are also expected to increase – accounting for 28% of growth in households in the 2011-2021 period compared to 11% in 2006-2011 period.

Table 23: Household Projections by Age of Head of Household, 2001-2031

Age Of	2006		2011		2021		2031		2006-2031
Head	Total	%	Total	%	Total	%	Total	%	Change
under 44	65,500	40.4%	67,858	36.7%	81,124	35.0%	88,506	32.6%	23,006
45-64	61,987	38.2%	74,981	40.6%	87,389	37.7%	92,400	34.1%	30,413
65+	34,758	21.4%	41,830	22.7%	63,323	27.3%	90,396	33.3%	55,638
Total	162,245	100.0%	184,669	100.0%	231,836	100.0%	271,302	100.0%	109,058

Source: Lapointe Consulting Inc.

Table 24: Projected Change in the Number of Households by Age of Household Maintainer

Age Of	2006-2011		2011-2021		2021-2031		2006-2031	
Head	Total	%	Total	%	Total	%	Change	%
under 44	2,358	10.5%	13,265	28.1%	7,382	18.7%	23,006	21.1%
45-64	12,994	57.9%	12,408	26.3%	5,011	12.7%	30,413	27.9%
65+	7,072	31.5%	21,493	45.6%	27,073	68.6%	55,638	51.0%
Total	22,425	100.0%	47,166	100.0%	39,467	100.0%	109,058	100.0%

Source: Lapointe Consulting Inc.

5.3 EMPLOYMENT PROJECTIONS

The Growth Plan for the Greater Golden Horseshoe, 2006 provides employment projections for the GGH and areas within it, including Simcoe. Overall employment in the GGH is projected to increase from 3.81 million jobs in 2001 to 5.56 million jobs in 2031 – a 46% increase in employment. Simcoe's employment is projected to increase from 153,000 to 254,000 – or 101,000 representing an increase of 66%. An employment increase of this size will help to ensure that in the future Simcoe has a balance of jobs and residents.

A more detailed discussion will take place regarding employment projections by sector for all of Simcoe as well as employment projections for each municipality. This exercise will be done as part of the Growth Potential Assessment.

6 SUMMARY AND CONCLUSIONS

6.1 DEMOGRAPHIC TRENDS

6.1.1 Population Growth

This report has reviewed demographic, housing and employment trends in Barrie, Orillia and Simcoe County. The report has shown that Simcoe as a whole and particular communities within Simcoe are experiencing very high growth rates. Simcoe's growth rate is twice as high as the Province's and communities such as Wasaga Beach and Barrie are among the fastest growing municipalities in Canada and Ontario.

Much of the population growth in Simcoe is concentrated in the southern part of the study area – Barrie, New Tecumseth and Innisfil – and in selected northern communities – particularly Wasaga Beach. Together these four municipalities accounted for 75% of Simcoe's growth between 1996 and 2001.

Over time there has been a growing concentration of the population in Barrie which has grown from 21.7% in 1991 to an estimated 30.2% in 2006. At the same time, the share of the population in other communities has remained constant or declined slightly. For example, Orillia's share of the population has declined from 9.0% in 1991 to an estimated 6.9% in 2006, even though it has experienced positive population growth.

6.1.2 Components of Growth

A review of data from Statistics Canada on components of population growth has shown that over a six year period (1997-98 to 2002-03), natural increase accounted for 13% of population growth while net migration (the number of residents moving into Simcoe minus those moving out) accounted for 87% of the population increase. Most of the net migration was from residents moving from other parts of Ontario into Simcoe. While data was not available on the former place of residence of those moving into Simcoe, a study of migration patterns in the Greater Toronto Area (GTA) suggests that most of the in-migrants to Simcoe come from the GTA. In contrast most of the population growth in the GTA is due to the in-migration of external immigrants (outside of Canada).

6.1.3 Age Distribution

A review of the age distribution in Simcoe shows that while Simcoe overall is very similar to Ontario as a whole, there is considerable variation among municipalities. More northern municipalities such as Collingwood, Orillia, Wasaga Beach, Penetanguishene and Midland have a higher proportion of their population who are 55+ as many people are retiring to these locations or moving there for lifestyle reasons. For example, in Wasaga Beach 38% of the population was 55 years and older in 2001. The attractiveness of these areas to older adults will be taken into account when projecting future housing requirements and population for these communities.

More southern municipalities tend to have higher proportions of young persons under 19 years of age, although First Nations communities have the highest proportions of children.

Barrie, Essa and Bradford West Gwillimbury have high proportions of their population who are younger adults -20-29 years of age and 30-39 years of age. These municipalities tend to have affordable housing options for younger families, provide opportunities for those commuting to nearby employment opportunities and are close to natural recreational outdoor opportunities/facilities. Native communities also have a higher number of younger adults reflecting the higher birth rates in those communities.

6.1.4 Household Growth and Household Size

An examination of household growth shows the predominant position of Barrie which accounted for 52% of Simcoe's population change between 1996 and 2001 and 46% of household change. Other municipalities had low or negative population growth but higher household growth (e.g., Midland, Penetanguishene, Collingwood). These municipalities tend to have higher proportions of their population who are older. As populations age, they may have positive household growth even though the population may not grow. For example, as families move through different life cycles, they form additional households although the population may remain constant or actually decline as some younger people move out of a given area to find employment or to pursue a secondary education.

Overall, Simcoe's household size has been identical to that of Ontario's since 1991 and there was little change between 1996 and 2001. However, there is considerable variation within Simcoe with smaller household sizes generally found in more northern municipalities - also those municipalities with older age structures. Municipalities north of Toronto and in the Barrie area have household sizes that range between 2.8 to 3.1 persons per household – illustrating the attractiveness of these areas to younger families.

6.2 TRENDS IN TENURE AND HOUSING PREFERENCES

6.2.1 Tenure

Overall within Simcoe County, 78.5% of housing units are owned and 21.5% are rented. The highest proportion of rented housing is found in the urban areas such as Orillia, Barrie, Collingwood and Penetangiushene where between 29 to 36% of units are rented. A substantial portion of Simcoe's rental housing is in the form of rented single family homes accounting for almost a third of rented housing.

6.2.2 Dwelling Type Preferences

Currently the majority of the population lives in single detached dwellings which account for over three quarters of all dwellings in Simcoe (77.1%). The highest proportions of such preferences are found among those aged 35-44 years of age, 45-54 years of age and 55-64 years of age. After 64 years of age, there is a declining preference for single detached dwellings. Overall a small proportion of the population live in semi detached dwellings which only account for 3.8% of all units – with the highest proportion found amongst younger households – presumably for affordability reasons.

Rows and other attached housing account for only 5% of all dwellings in Simcoe – well below the proportion experienced in other parts of Ontario. One would expect that over time row housing will become a more popular house form for both affordability as well as life style reasons, that is, they appeal to empty nesters and retirees.

There is a strong demand for apartments among younger households and older households. As the population ages, there will be an increasing demand for apartments and other forms of housing oriented to seniors such as smaller singles and attached housing.

While the housing preferences in Simcoe tend to reflect fairly traditional housing choices compared to Southern Ontario and in many municipalities in the GTA, there is an increasing demand for higher density housing for empty nesters, early retirees and seniors. In the Growth Potential Assessment report, we will use data from housing preferences in Simcoe, Ontario and the GTA to estimate future housing choices in Simcoe.

6.3 PROJECTED POPULATION

The population in Simcoe is projected to increase from 392,000 in 2001 (post-censal) to 667,000 in 2031 representing an increase of 70%. While much of this growth will come from young families as a result of local population growth or in-migration from other places in the GGH, there will also be a significant aging of the population. This is a trend that is occurring across Canada and Ontario and municipalities need to plan to ensure that there are sufficient housing choices for older adults and local community support services. The challenge in the Growth Potential Assessment will be to provide an urban structure that respects the individual differences and strengths among local communities and the natural environment but also provides sufficient housing opportunities to meet the projected population and household growth.

6.4 EMPLOYMENT TRENDS AND PROJECTIONS

Simcoe has a well balanced economy with strength in the primary sector (agriculture), manufacturing and the service sector and tourism sector. Different communities have different employment strengths with some communities having more diversified economies than others. Barrie and New Tecumseth represent the predominant employment centre with a strong manufacturing base that continues to show impressive improvements. Municipalities located along the waterfront of Georgian Bay and Lake Simcoe are more oriented to tourism and to recreational and life style developments, including housing developments for retirees. These communities have strong hospitality and food service industries and a growing service sector catering to full-time residents and part-time visitors. Industrial employment continues to be important in a number of different communities such as Midland and Collingwood. The challenge in the future will be to ensure that new jobs are well-paying jobs and not concentrated in lower-paying service sector jobs.

The role of agriculture has been discussed in depth in Wayne Caldwell's report on rural and agricultural development.

While a number of municipalities come close to the ideal ".5 jobs per resident" most are well below this. Again, the challenge for the future will be to continue to attract employment that can service the local population and that can be used to export goods and services outside the local population. This will help to reduce commuting in the future.

Most residents of Simcoe (75.4%) in 2001 also worked there. Another 23.4% of residents worked in other areas of the GTA. Only 1.2% worked in other parts of Ontario or Canada.

Forty-two percent (42%) of commuters worked in the municipality in which they resided. Another 33.6% worked in other areas of Simcoe. Most commuters who found employment in the GTA commuted to York Region (10.2%). Commuters to Toronto accounted for another 8.4%, while those employed in Peel accounted for 4.5%. In 2001, less than 1% of Simcoe residents commuted to Halton and Durham for work.

The greatest opportunity for residents to find employment within their place of residence was found in Barrie, Collingwood, Midland and Orillia. Other municipalities with significant local employment opportunities were New Tecumseth and Penetanguishene. Residents most likely to commute to work outside of Simcoe came from Bradford West Gwillimbury, Innisfil and New Tecumseth – communities on the edge of the GTA.

Simcoe's employment is projected to increase from 153,000 to 254,000 – or 101,000 representing an increase of 66%. An employment increase of this size will help to ensure that in the future Simcoe has a balance of jobs and residents.

6.5 IMPLICATIONS FOR FUTURE GROWTH AND DEVELOPMENT

The demographic, housing and employment trends have several implications for growth and development in the IGAP study area.

1. The Simcoe area is anticipated to grow to 667,000 by 2031 – an increase of 275,000 people between 2001 and 2031. Such growth will account for approximately a third of growth in the Outer Ring. The challenge will be to accommodate this growth in a way that promotes a high quality of life while preserving the natural features of Simcoe including its agricultural base.
2. The aging of the population will pose particular challenges for the IGAP study area as it will for Canada and Ontario. There will be a need to support the development of communities and individual developments that cater to the 55+ age groups and provide community support services that enable such individuals to live independently as long as is possible.
3. Based on demographic trends and the objectives of the Growth Plan for the Greater Golden Horseshoe, 2006 report, there will be a need to provide a greater mix of dwelling units in the future than is currently the case which is predominantly oriented to low density housing, single detached dwellings.
4. Smaller households in the future will result in a need for smaller housing especially for empty nesters and retirees, again reinforcing the need for more medium density and higher density housing.

5. While housing affordability is a problem for low and moderate income households today, housing affordability may affect more households in the future as land becomes more expensive in the GTA and this pushes up land and housing costs in Simcoe. Again, this reinforces the need for a greater mix of dwelling types in the future.
6. In order to achieve "complete communities" as outlined in the Growth Plan for the Greater Golden Horseshoe, 2006, employment opportunities across Simcoe, Barrie and Orillia, among other factors, are required.

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APPENDIX

Table A1: Comparison of Simcoe In-migration and Toronto CMA's Outmigration

Simcoe Intraprovincial Migration			
Year	Out Of Toronto CMA	In To Simcoe	In To Simcoe Vs. Out Of Toronto CMA
1997-98	63,727	18,236	28.6%
1998-99	62,380	18,585	29.8%
1999-00	68,689	19,942	29.0%
2000-01	60,417	16,733	27.7%
2001-02	70,494	20,149	28.6%
2002-03	70,417	19,604	27.8%

Source: Statistics Canada, Annual Demographic Statistics, Catalogue #91-213, various years

Table A2: Growth Rates in CMA's and CA's Across Ontario, 1996-2001

CMA/CA Name	1996	2001	% change
Barrie	118,695	148,480	25.1%
Guelph	105,997	117,344	10.7%
Oshawa	268,773	296,298	10.2%
Toronto	4,263,759	4,682,897	9.8%
Kitchener	382,940	414,284	8.2%
Windsor	286,811	307,877	7.3%
Ottawa - Hull	751,646	806,096	7.2%
Leamington	43,798	46,757	6.8%
Tillsonburg	13,211	14,052	6.4%
Cobourg	16,185	17,172	6.1%
Hamilton	624,360	662,401	6.1%
Orillia	38,103	40,256	5.7%
London	416,546	432,451	3.8%
Collingwood	15,596	16,039	2.8%
Woodstock	32,253	33,061	2.5%
Stratford	29,007	29,676	2.3%
Peterborough	100,285	102,423	2.1%
Brantford	84,764	86,417	2.0%
Kawartha Lakes	67,926	69,179	1.8%
Kingston	144,528	146,838	1.6%
Hawkesbury	10,162	10,314	1.5%
St. Catharines - Niagara	372,406	377,009	1.2%
Midland	33,291	33,692	1.2%
Port Hope and Hope	15,446	15,605	1.0%
Norfolk	60,534	60,847	0.5%
Owen Sound	31,646	31,583	-0.2%
Belleville	87,871	87,395	-0.5%
Brockville	45,170	44,741	-0.9%
North Bay	64,785	63,681	-1.7%
Chatham-Kent	109,650	107,709	-1.8%
Cornwall	58,987	57,581	-2.4%
Sarnia	90,697	88,331	-2.6%
Kenora	16,365	15,838	-3.2%
Thunder Bay	126,643	121,986	-3.7%
Pembroke	23,155	22,223	-4.0%
Sault Ste. Marie	83,619	78,908	-5.6%
Petawawa	15,304	14,398	-5.9%
Greater Sudbury	165,618	155,601	-6.0%
Haileybury	13,712	12,867	-6.2%
Timmins	47,499	43,686	-8.0%
Elliot Lake	13,588	11,956	-12.0%
Ontario	10,753,573	11,410,046	6.1%

Source: Statistics Canada, 2001 Census

Table A3: Estimating 2006 Population by Municipality, Barrie, Orillia and Simcoe County

	2001		Additions	2006		
Municipality	Census Dw.	PostC. Dw.**	2001-2006	Occ. Dw.	Hhld Sz	Pop.
Adjala-Tosorontoio	3,300	3,410	482	3,892	2.97	11,580
Barrie	36,855	38,090	9,560	47,650	2.78	132,270
Bradford West Gwillimbury	7,130	7,370	960	8,330	3.07	25,600
Clearview	4,800	4,960	246	5,206	2.78	14,450
Collingwood	6,575	6,800	989	7,789	2.38	18,530
Essa	5,545	5,730	617	6,347	2.97	18,880
Innisfil	10,195	10,540	1,125	11,665	2.78	32,380
Midland	6,550	6,770	302	7,072	2.38	16,830
New Tecumseh	9,275	9,590	933	10,523	2.78	29,210
Orillia	11,610	12,000	607	12,607	2.38	30,000
Oro-Medonte	6,605	6,830	796	7,626	2.78	21,170
Penetanguishene	3,130	3,230	261	3,491	2.48	8,650
Ramara	3,415	3,530	431	3,961	2.48	9,820
Severn	4,185	4,330	555	4,885	2.58	12,590
Springwater	5,350	5,530	654	6,184	2.97	18,390
Tay	3,470	3,590	259	3,849	2.58	9,920
Tiny	3,535	3,650	623	4,273	2.48	10,590
Wasaga Beach	5,195	5,370	1,534	6,904	2.38	16,430
Municipal Totals	136,720	141,320	20,934	162,254		437,290

Note: The 2001 census was adjusted for the census undercount and the undercount of dwellings was estimated. Annual average additions for 2001-2006 (based on dwelling permits 2001-2005 from Will Dunning's Housing Market Pressures Report) were used to estimate the total number of households in 2006. The dwellings were then multiplied by the household size to estimate each municipality's population for 2006.

Source: Lapointe Consulting Inc.

Table A4: Distribution of Labour Force 2001 By Municipality

Industry	Adjala	Clear -view	New Tecum.	Spring -water	Brad -ford	Severn	Innisfil	Ramara	Essa	Oro- Medonte	Colling -wood	Barrie	Orillia	Was -aga	Tiny	Tay	Pene -tang.	Mid -land
Agric., fstry, fishg & hntg	295	440	395	430	735	175	320	160	300	435	55	160	40	40	175	160	15	40
Mining, oil & gas	-	35	10	10	-	35	-	35	10	30	10	40	45	-	20	-	-	25
Utilities	45	40	105	95	70	45	65	35	70	90	40	290	50	25	40	60	-	70
Construction	405	605	990	770	1,275	520	1,585	290	545	895	630	3,945	825	695	450	300	310	330
Manufacturing	995	1,375	3,330	1,140	2,795	850	2,740	455	1,395	1,195	1,615	9,205	1,550	935	820	1,220	1,065	2,035
Wholesale trade	340	295	945	525	655	125	880	125	440	350	275	3,155	450	280	95	60	60	115
Retail trade	515	865	1,240	805	1,465	630	1,800	585	885	1,210	1,065	7,945	2,040	715	445	535	510	960
Transport and warehsg	440	330	1,050	375	525	365	1,025	220	555	510	230	2,710	390	240	165	175	125	260
Information & culture	160	70	205	225	315	75	350	40	100	160	130	1,405	155	60	85	60	25	85
Finance and insurance	160	185	240	215	345	85	415	55	125	275	190	1,720	330	160	105	85	105	140
Real estate, rental & lsng	85	105	245	130	170	100	215	55	160	125	190	1,115	285	150	95	55	45	100
Professional, sc. & tech.	325	350	675	375	640	165	695	115	360	465	270	2,850	360	250	165	110	80	235
Management	-	-	-	-	10	-	10	-	-	-	-	10	10	-	10	-	-	-
Admin, waste & remed.	235	325	620	390	475	130	805	195	400	405	315	2,630	420	275	205	130	110	200
Educational services	245	360	680	570	605	330	535	215	395	760	400	3,175	750	245	260	145	225	410
Health care & social ass.	425	630	945	920	860	595	975	295	635	1,045	775	4,950	1,855	380	550	460	565	900
Arts, entertainment & rec.	85	160	210	190	225	335	465	450	135	460	190	1,160	1,455	170	135	110	110	225
Accommodation & food	340	395	900	460	585	435	690	305	580	480	930	4,155	1,325	465	245	270	195	610
Other services	230	370	655	375	550	310	785	245	245	510	340	2,380	685	225	250	230	180	335
Public administration	355	400	435	460	510	380	635	180	2,040	655	250	2,880	940	250	175	145	215	270
Total	5,680	7,335	13,875	8,460	12,810	5,685	14,990	4,055	9,375	10,055	7,900	55,880	13,960	5,560	4,490	4,310	3,940	7,345