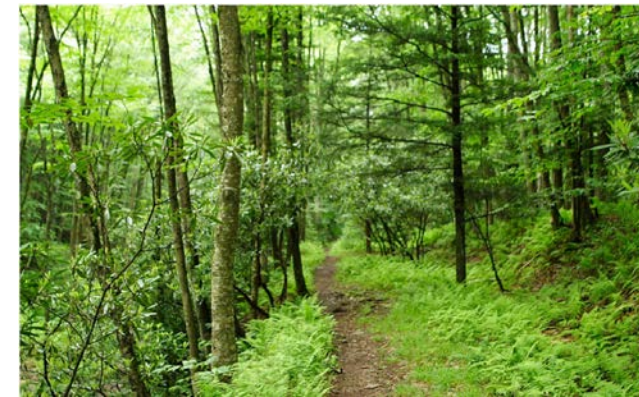
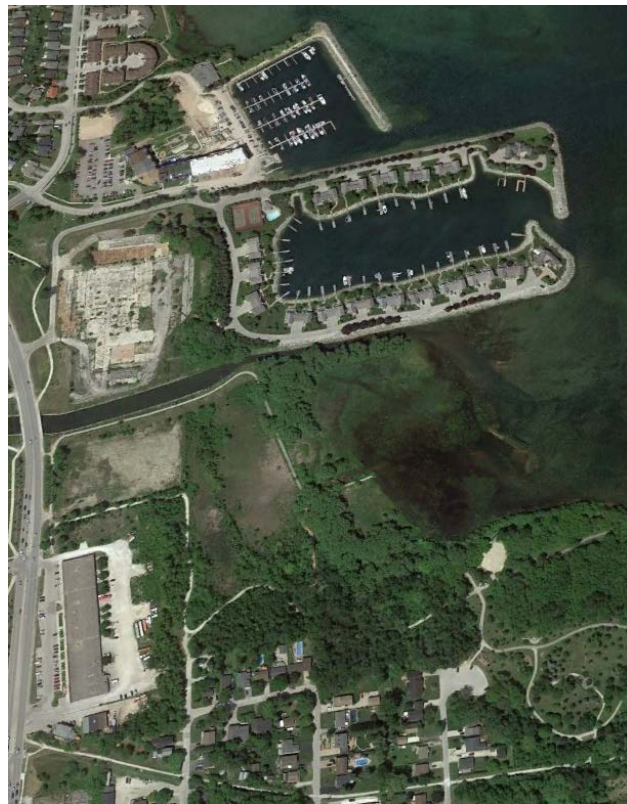




COUNTY OF SIMCOE

MUNICIPAL COMPREHENSIVE REVIEW

Council Workshop Land Needs Assessment



COUNTY OF SIMCOE
April 12th, 2022



Today We Will Discuss...

1. Growth Trends and Forecasts
2. Land Needs Assessment
 - a) Community Area Need
 - b) Employment Area Need
3. Next Steps

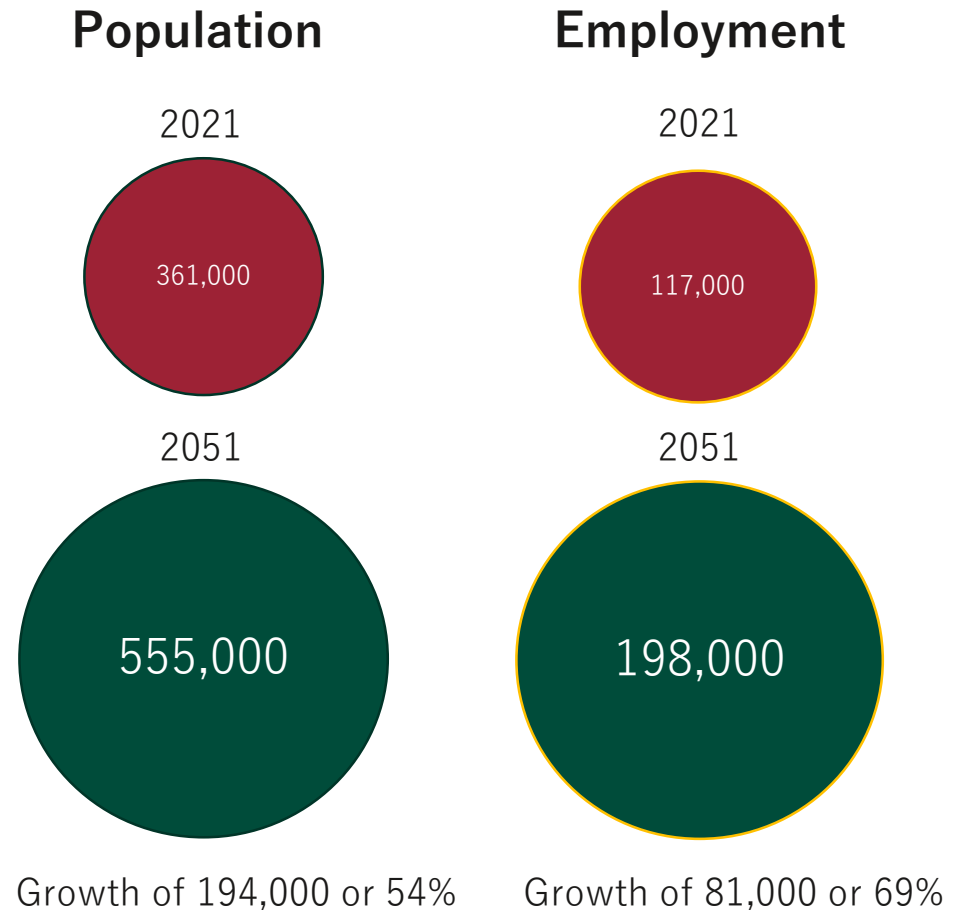
PART 1 – GROWTH TRENDS AND FORECASTS

Overarching Themes

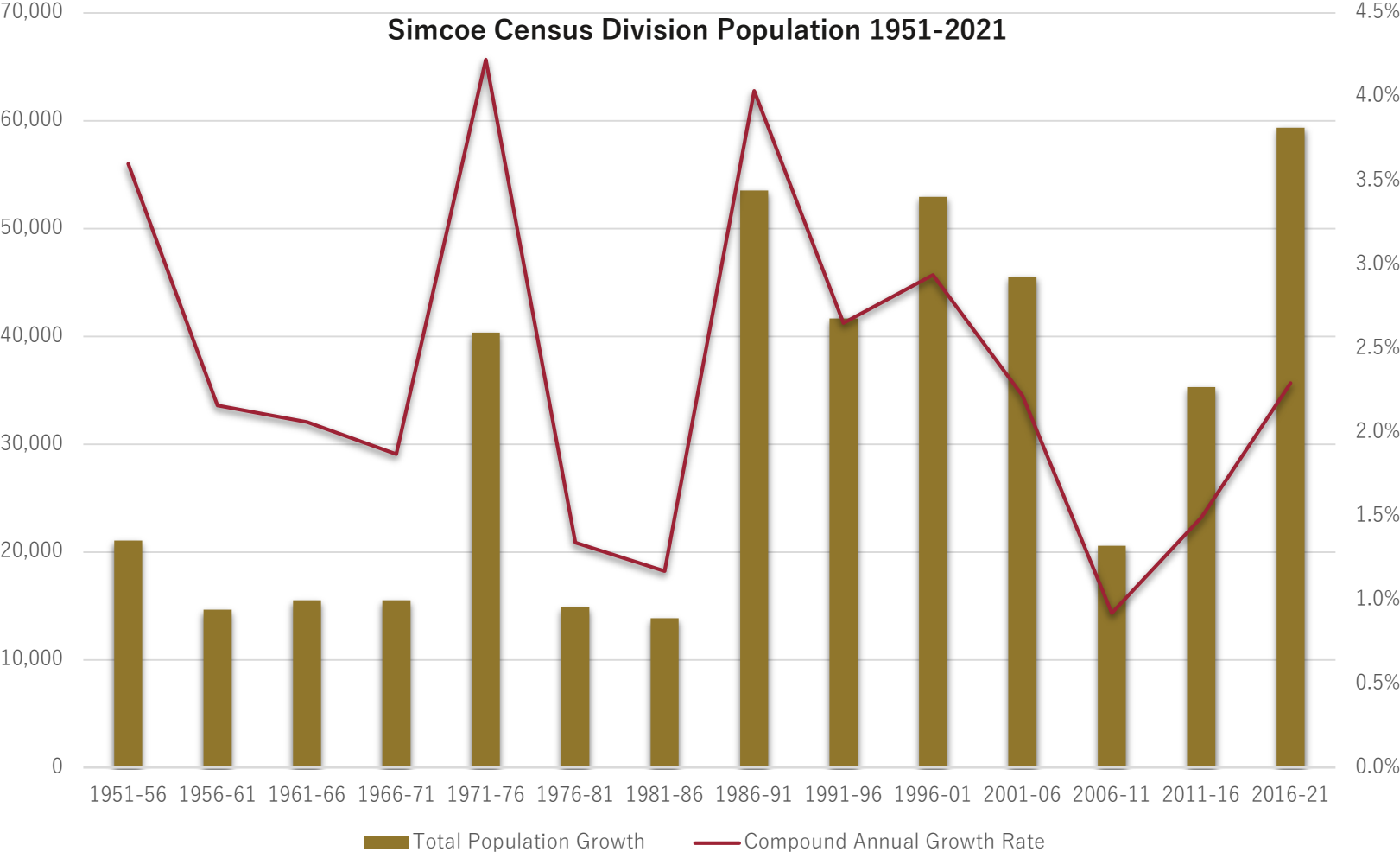
1. All municipalities are forecast to grow
2. Growth dynamics south of County Road 90 different from other areas of the County
3. Forecasts are long-term

Growth Plan Sets Growth Forecasts to 2051

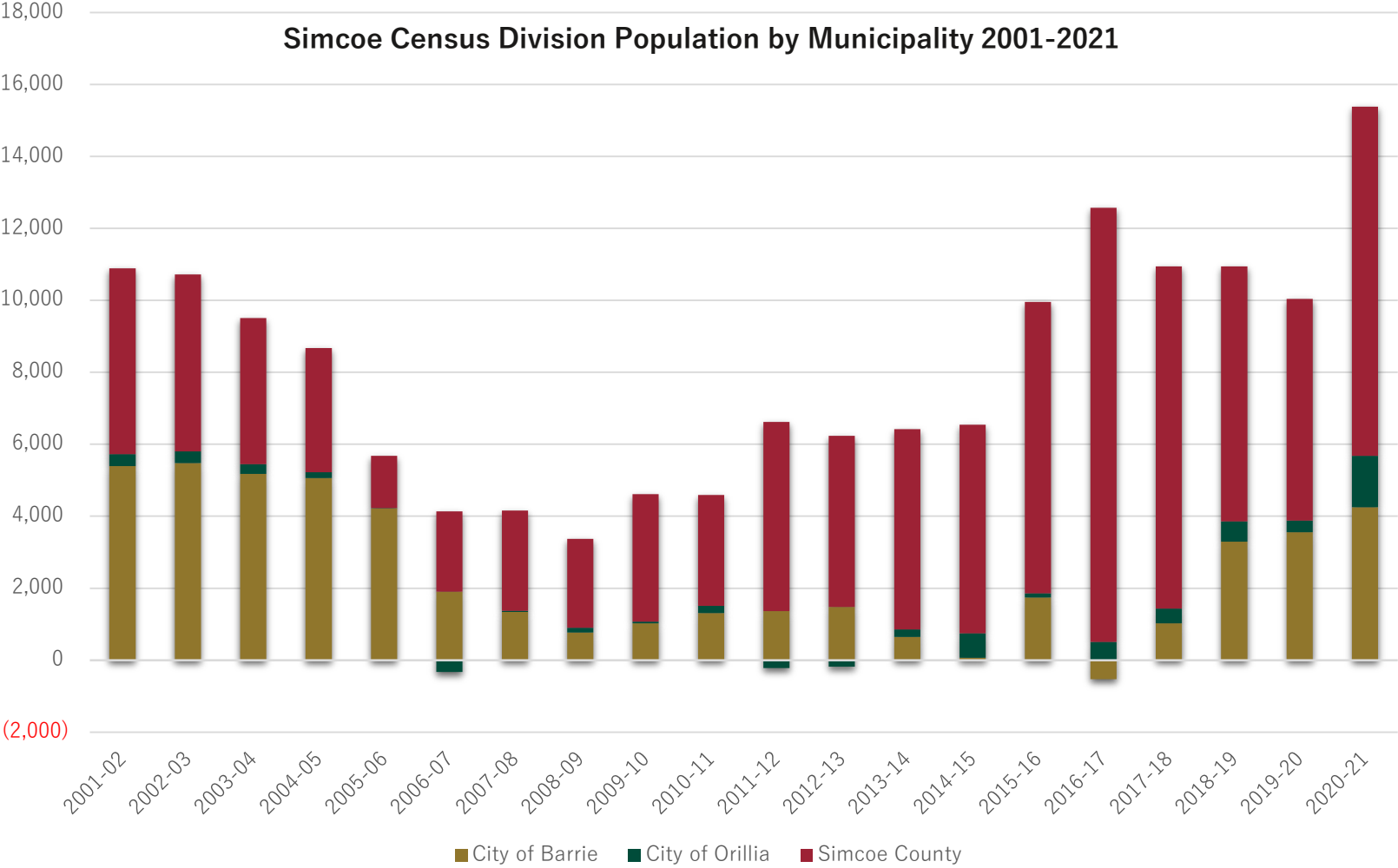
- Forecasts are minimums—however, they represent very rapid growth
- County must allocate growth to lower-tiers
- Land needs determined using prescribed Methodology



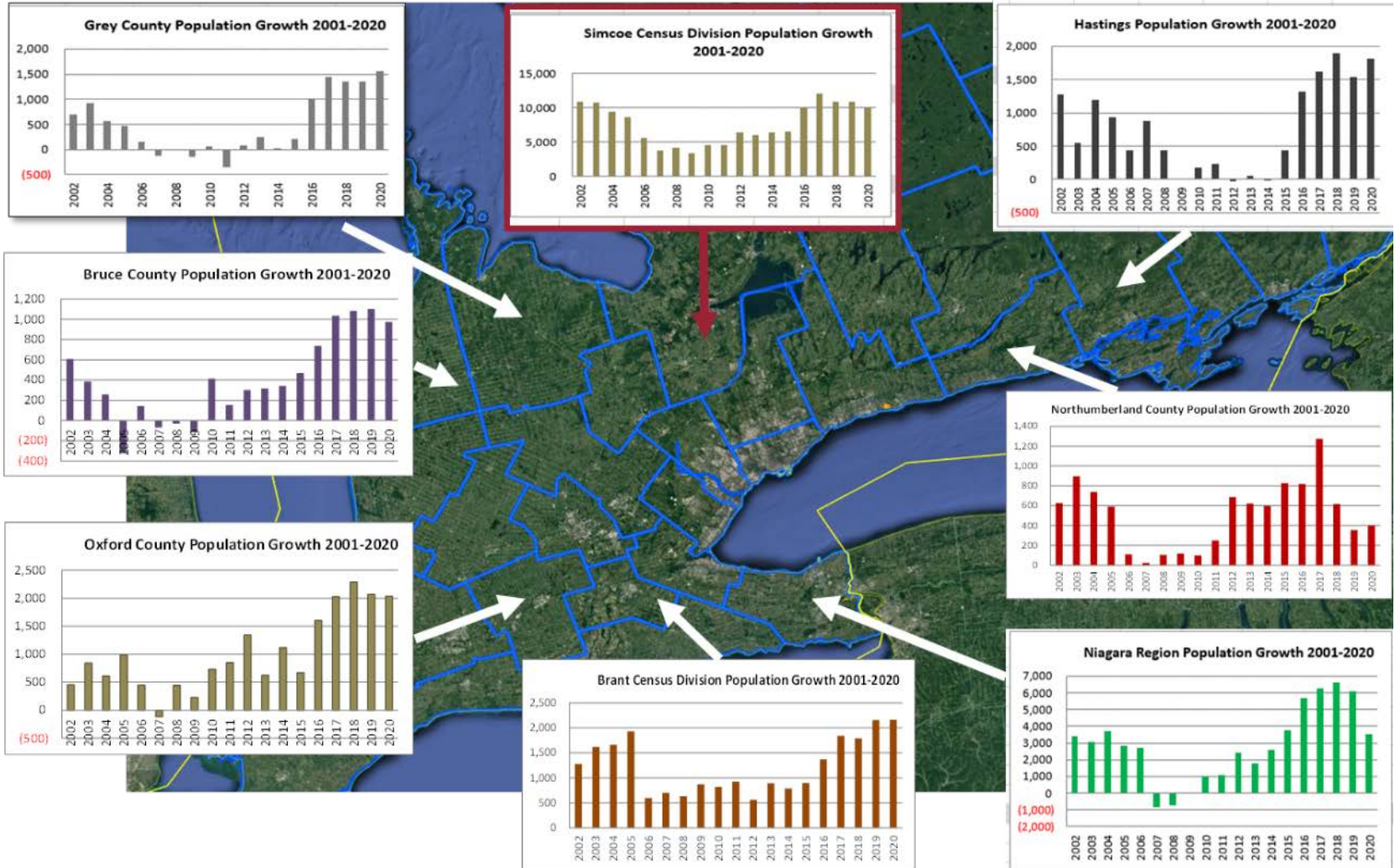
Sustained Population Growth in Simcoe Census Division Since 1950s



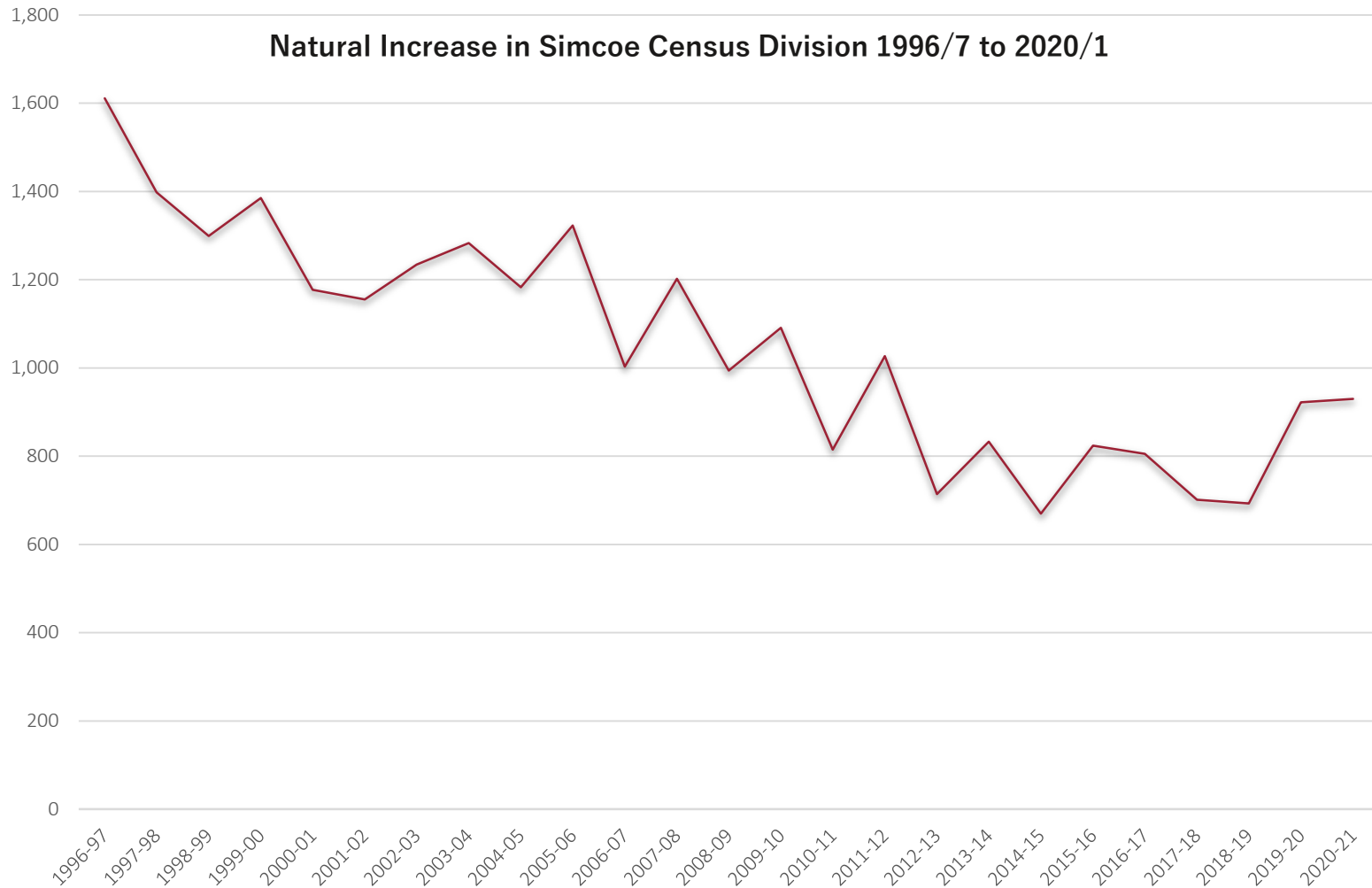
Growth in Simcoe Census Division Starting to Reorient Towards Barrie



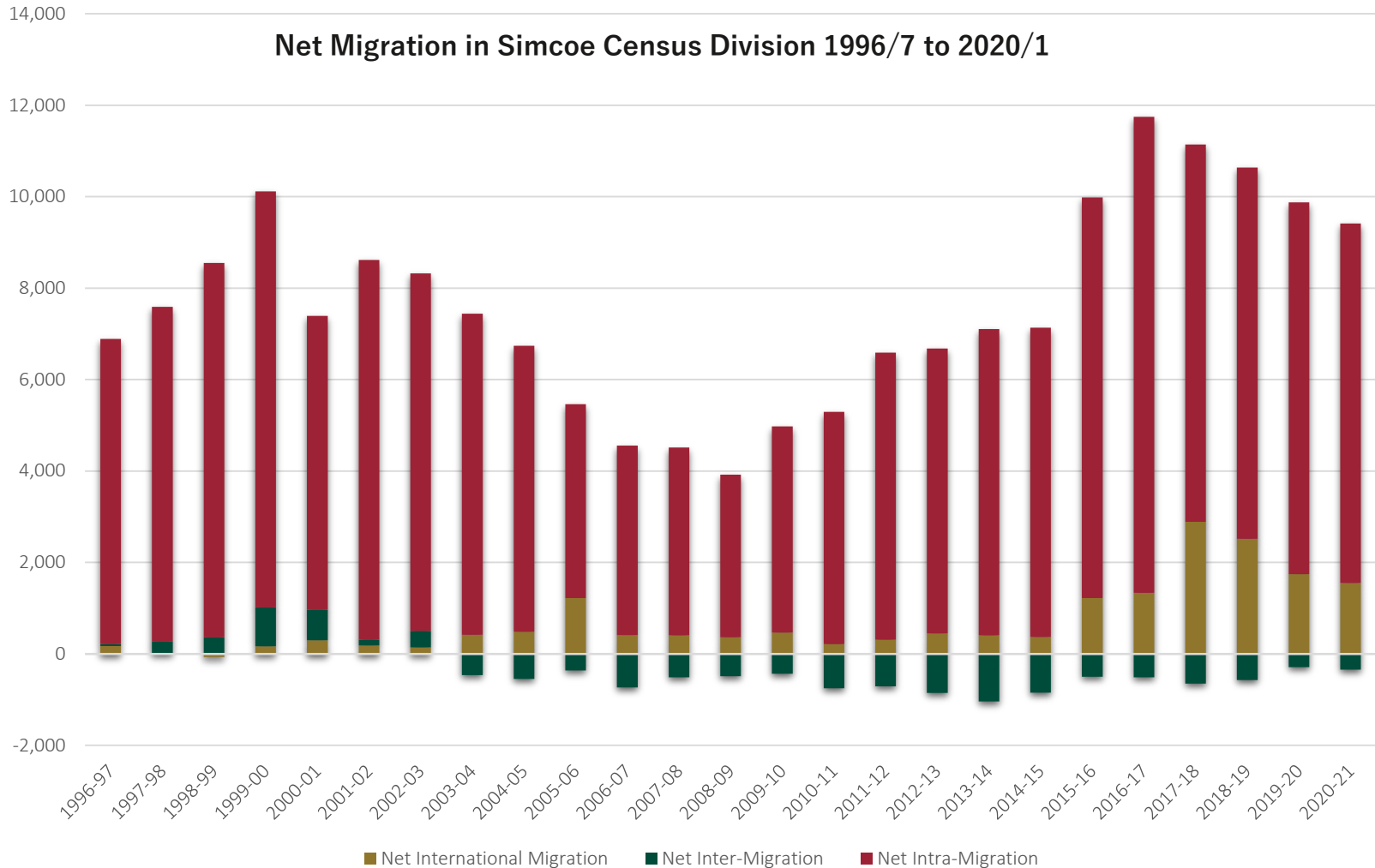
Highest Population Growth in Decades Now Occurring at Edge of GGH



Population Growth Less And Less Driven by Natural Increase...

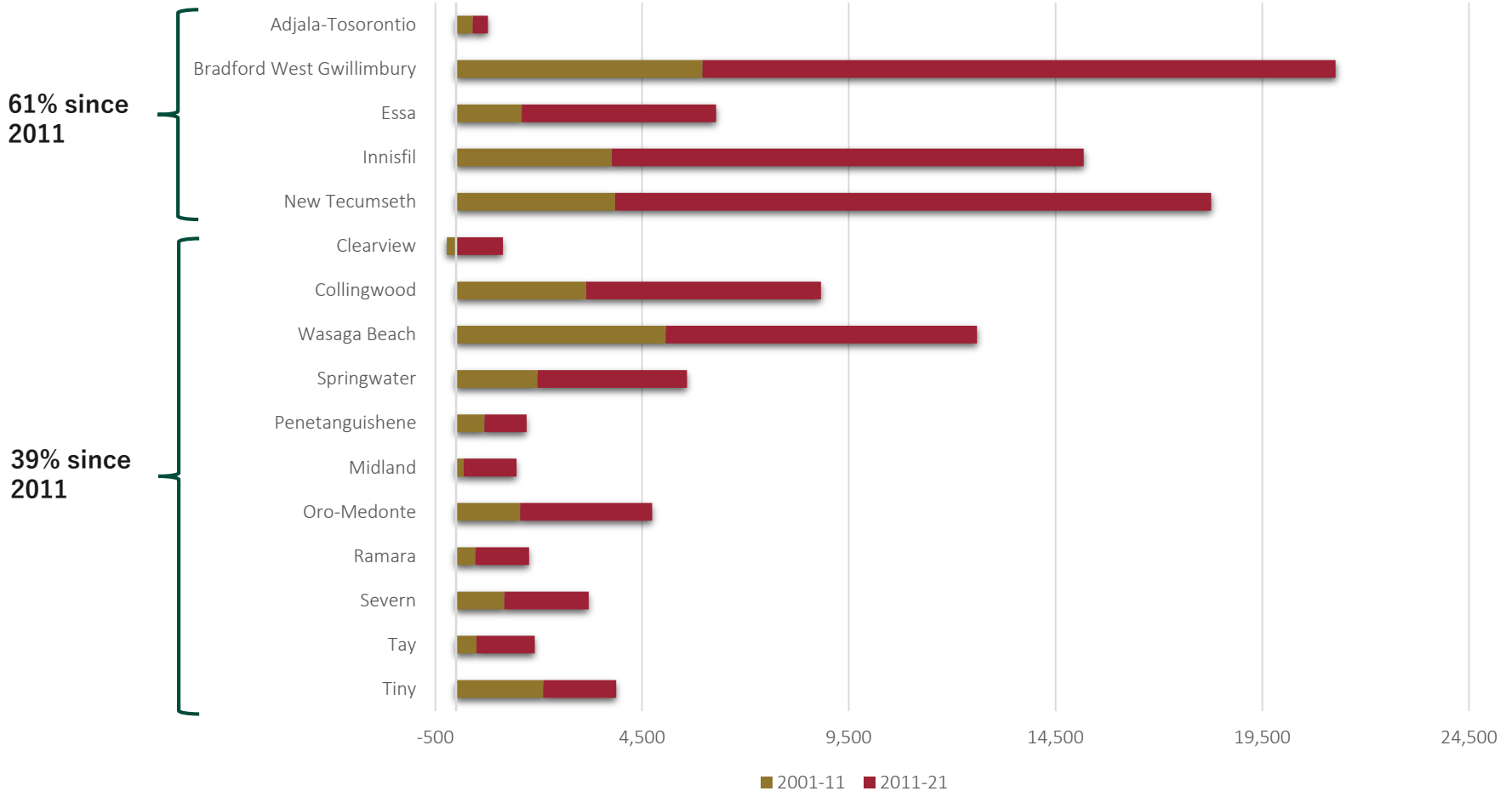


...And Increasingly Driven By In-Migration From Greater Toronto Area



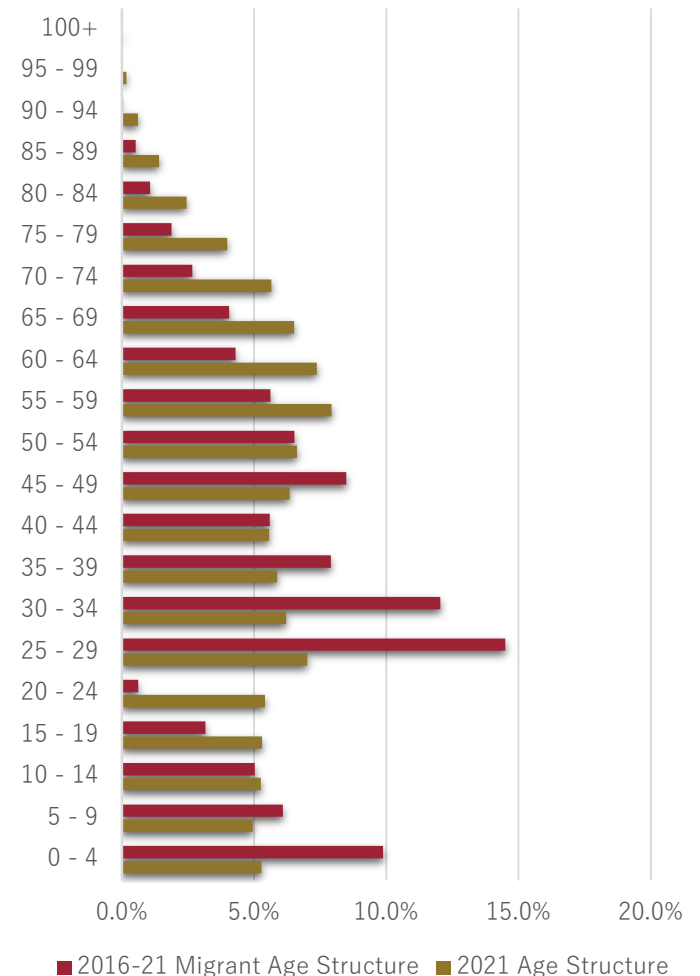
Recent Growth Surge Mainly in Established Urban Centres and South of Barrie

Population Growth by Local Municipality 2001-2021

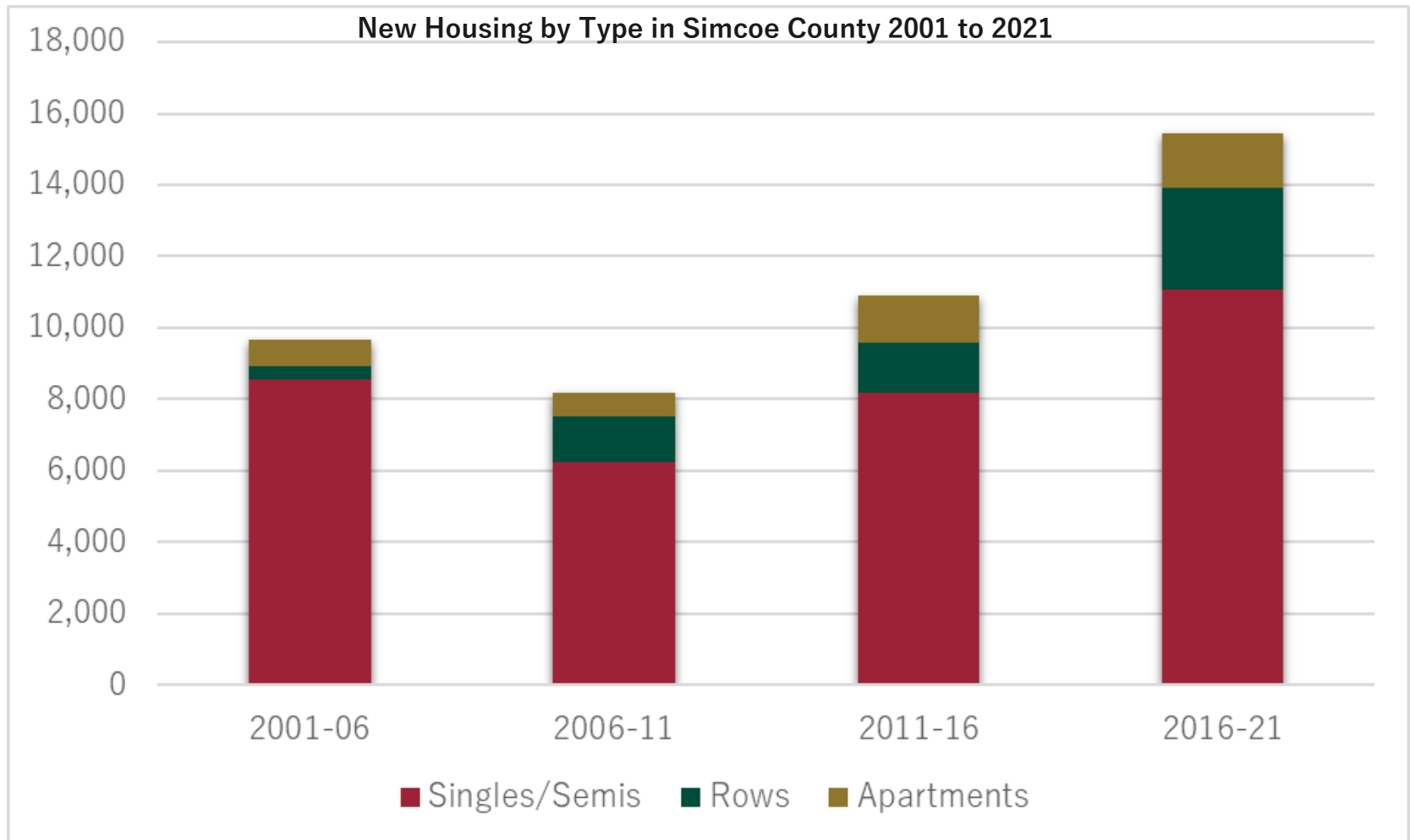


Housing Choice is Closely Linked to Age

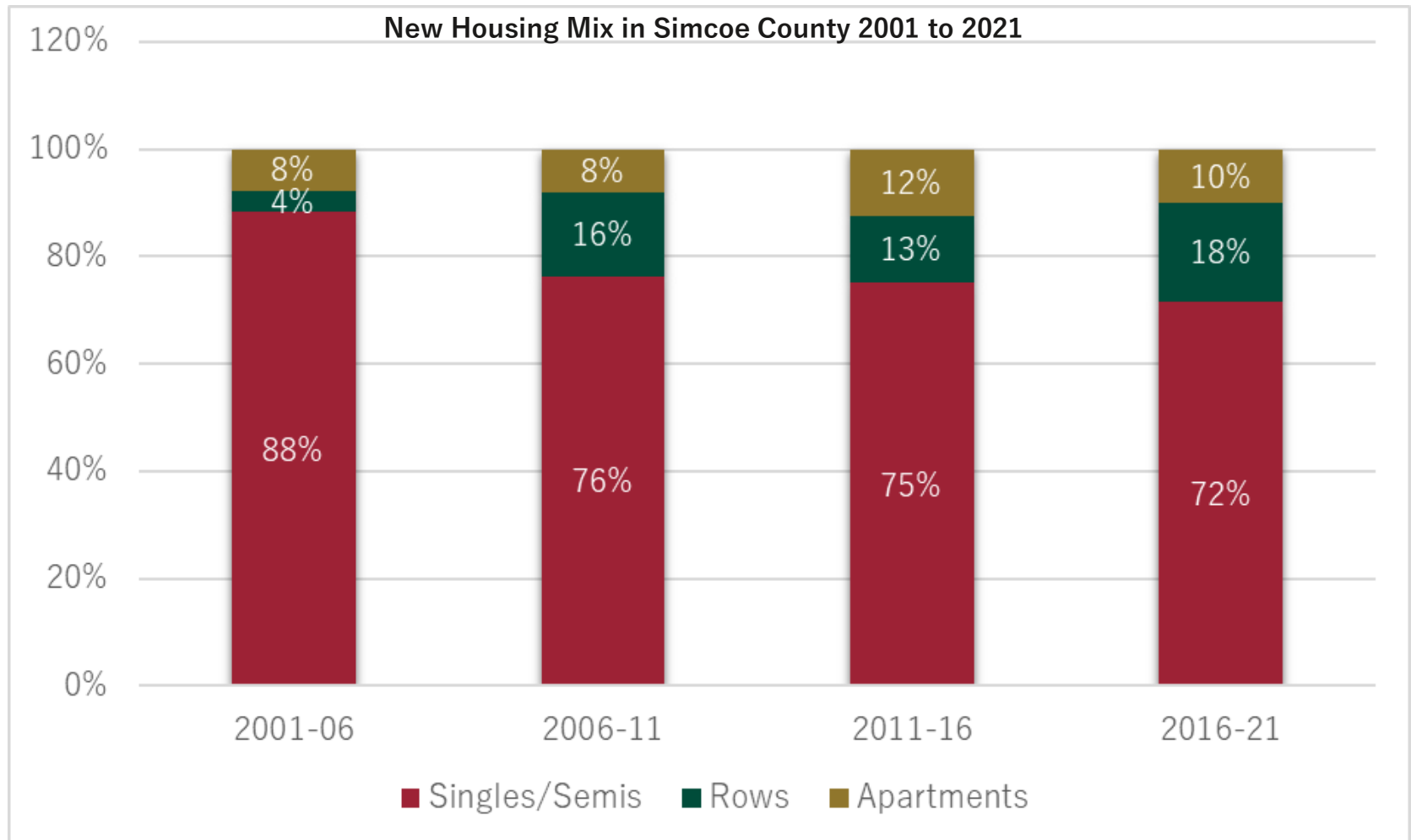
- Dominant age groups in Simcoe are Baby Boomers and Millennials
- New migrants are generally
 - Family forming and of working age
 - People in their peak earning years and early retirees
- Considerable out-migration of people in late teens and early 20s
- Trends likely to continue



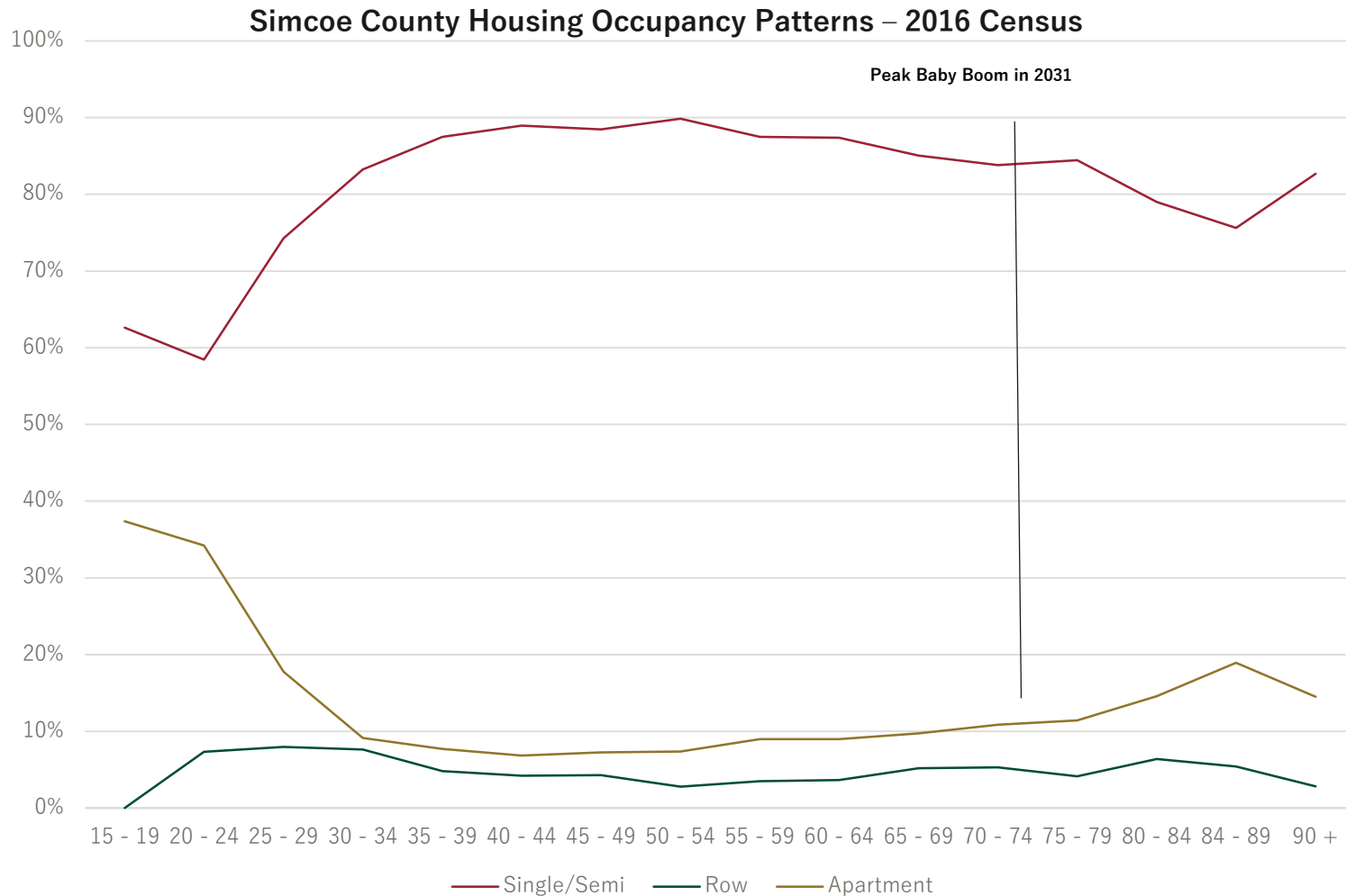
Longstanding Preference For Single-Detached Homes in Simcoe



However, County is Slowly Developing a Market for Rowhousing and Apartments



Demographic Change Will Shift Demand to Higher Density Housing



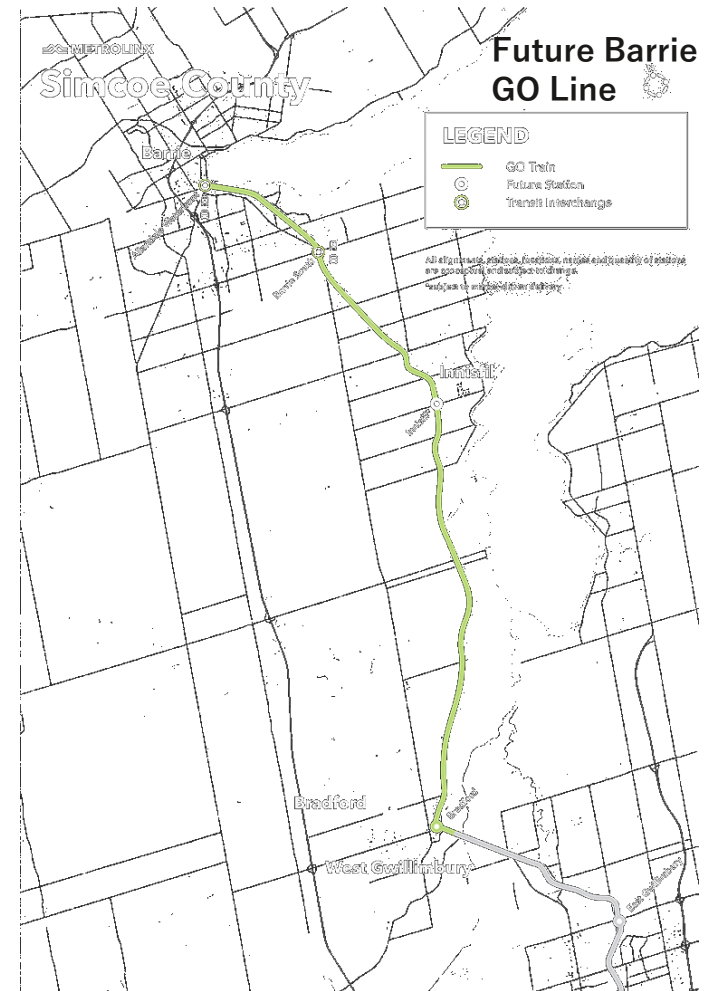
Affordability Could Also Drive People to Seek More Compact Housing

Change in Single-Family Home Average Sale Price for Select Municipalities (\$)

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

Existing and Planned Infrastructure Will Also Influence Distribution of Growth

- In Simcoe, more compact housing and transit-oriented communities requires
 - access to higher order transit
 - well established urban settlements
- Provincial highway investments will also improve connectivity



Growth Plan Directs Growth to Specific Locations

- Growth management policies for Simcoe Sub-Area (Section 6)
- Direct significant portion of growth to
 - primary settlement areas (PSAs)
 - key employment areas
- These policies are already reflected in County OP

Growth Plan – Schedule 8



Current Applications Suggest Continued Gradual Housing Shifts, Especially in “South”

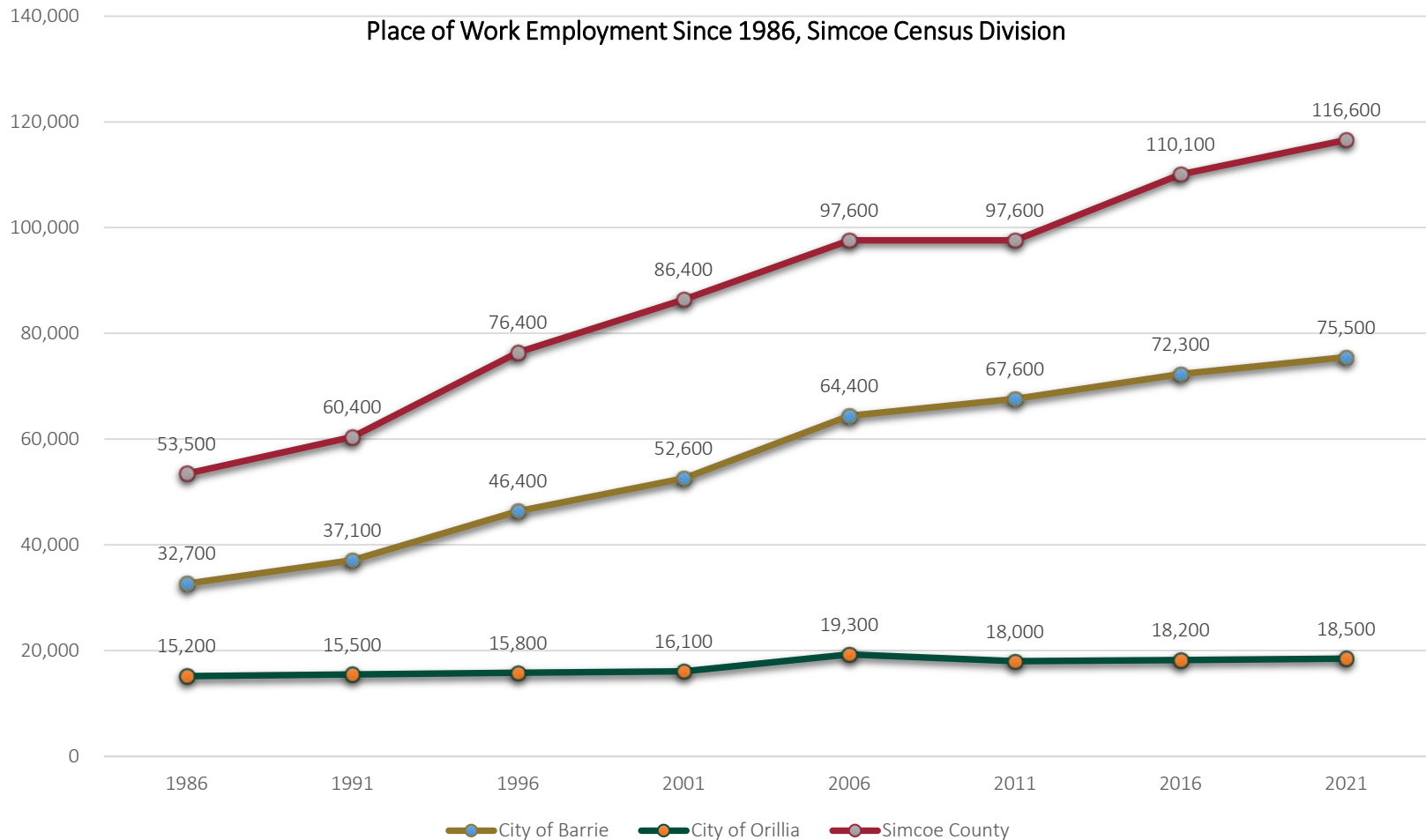
	2016-2021	County Applications	Applications in “South”	Applications in “North”
Singles/Semis	71%	60%	53%	62%
Rowhouses	19%	24%	22%	24%
Apartments	10%	17%	25%	14%
Total	100%	100%	100%	100%

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

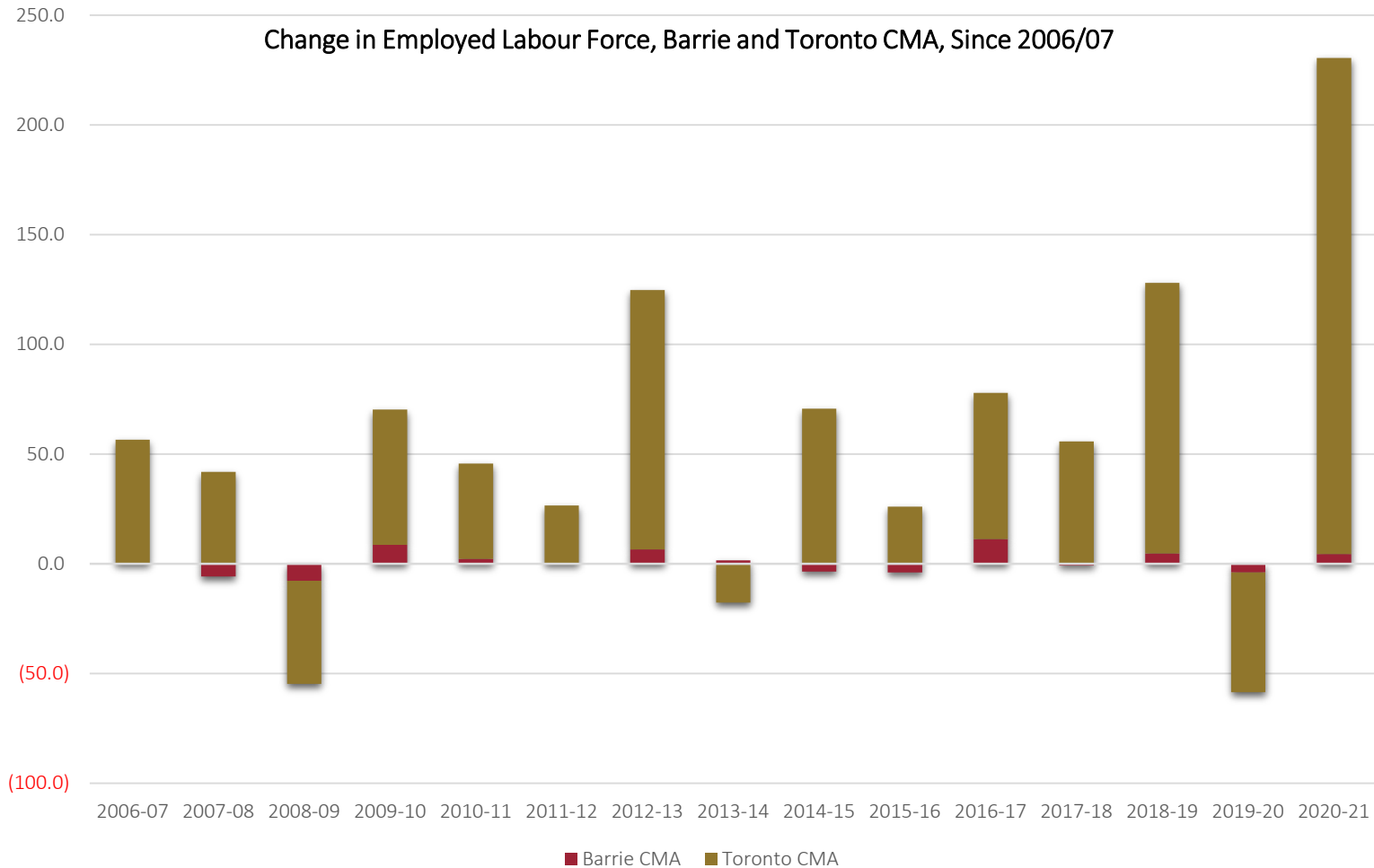
Population Allocation by Local Municipality

Municipality	2021	2051	2021-51	Increase
Adjala-Tosorontio	11,260	11,970	710	6%
Bradford West Gwillimbury	44,490	83,470	38,980	88%
Clearview	15,220	21,820	6,600	43%
Collingwood	25,470	42,690	17,220	68%
Essa	23,810	34,740	10,930	46%
Innisfil	44,710	84,450	39,740	89%
Midland	18,250	24,290	6,040	33%
New Tecumseth	45,480	80,590	35,110	77%
Oro-Medonte	23,770	26,230	2,460	10%
Penetanguishene	10,340	14,390	4,050	39%
Ramara	10,680	12,870	2,190	21%
Severn	14,750	17,790	3,040	21%
Springwater	22,320	32,490	10,170	46%
Tay	11,410	13,130	1,720	15%
Tiny	13,240	16,010	2,770	21%
Wasaga Beach	25,480	38,090	12,610	49%
Simcoe County	360,680	555,020	194,340	54%

Employment in Simcoe Census Division Not Immune to Global and Regional Economy

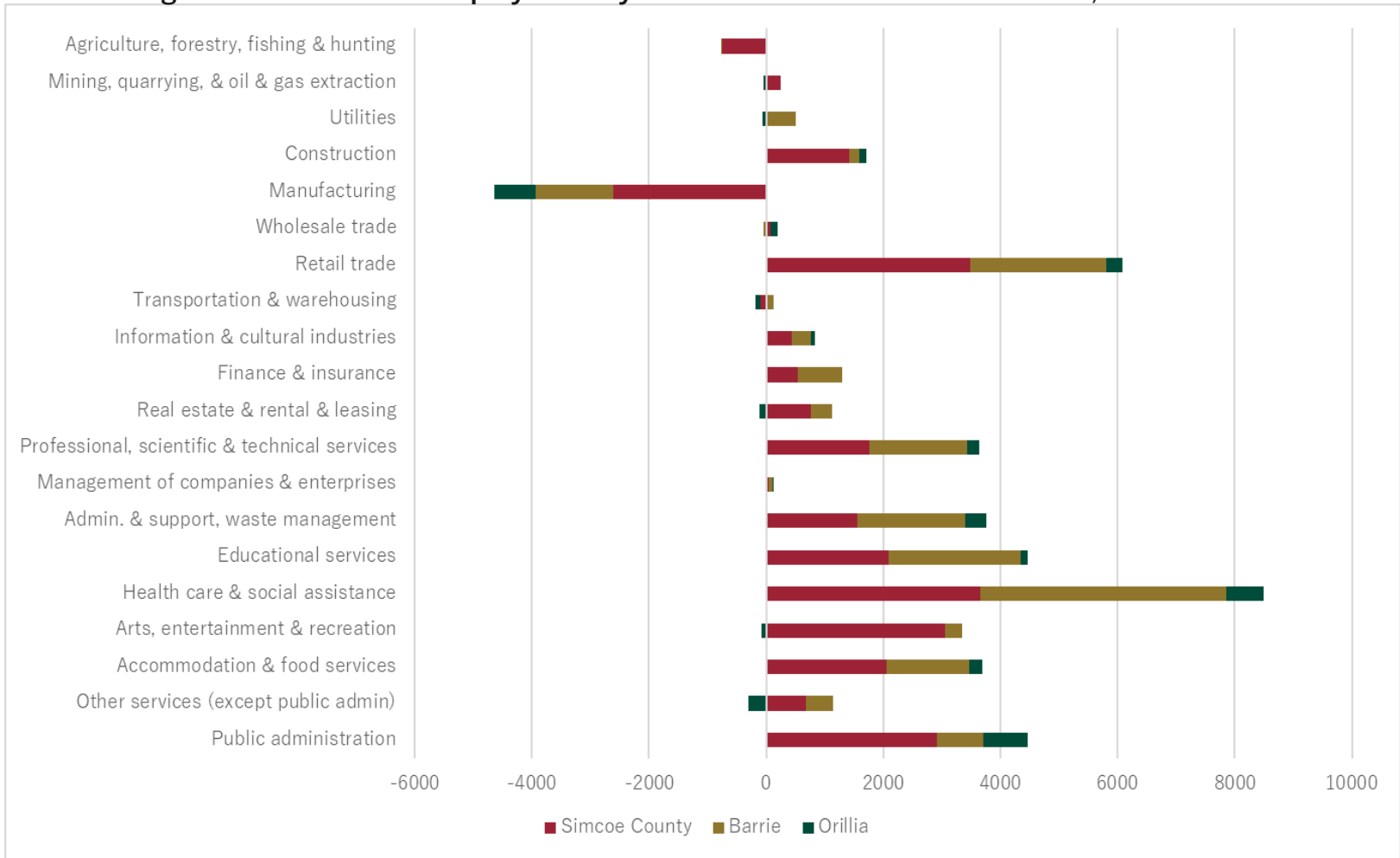


Economic Shock of Pandemic Starting to Ease, But Timing of Recovery Still Uncertain



Simcoe is a Diverse Economy, With Growth in Most Sectors

Change in Place of Work Employment by Sector in Simcoe Census Division, 2001 to 2021



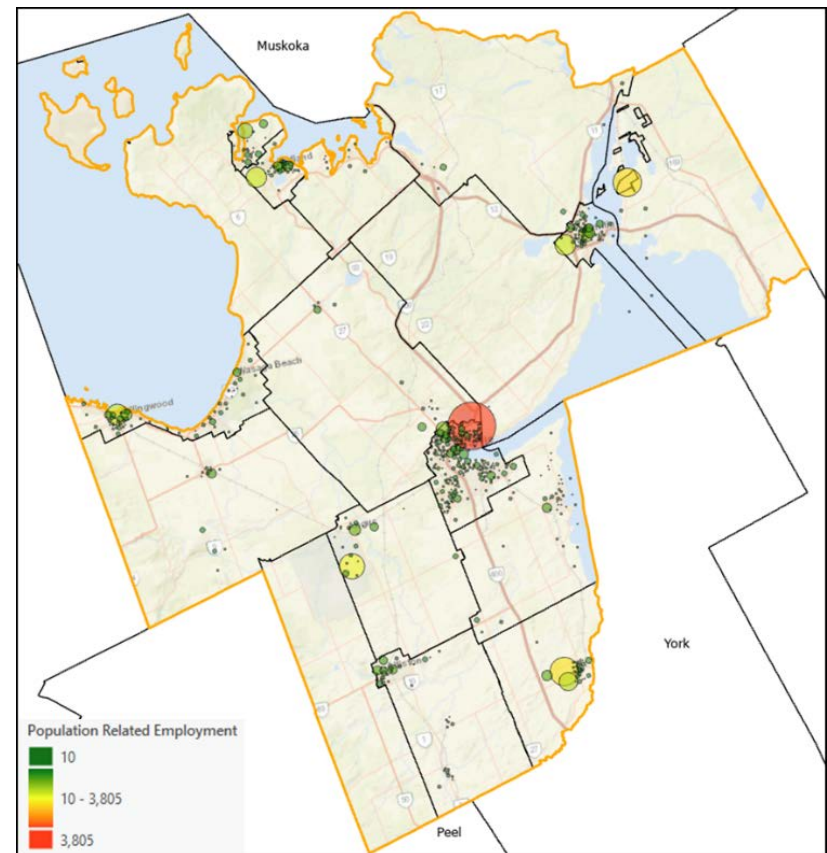
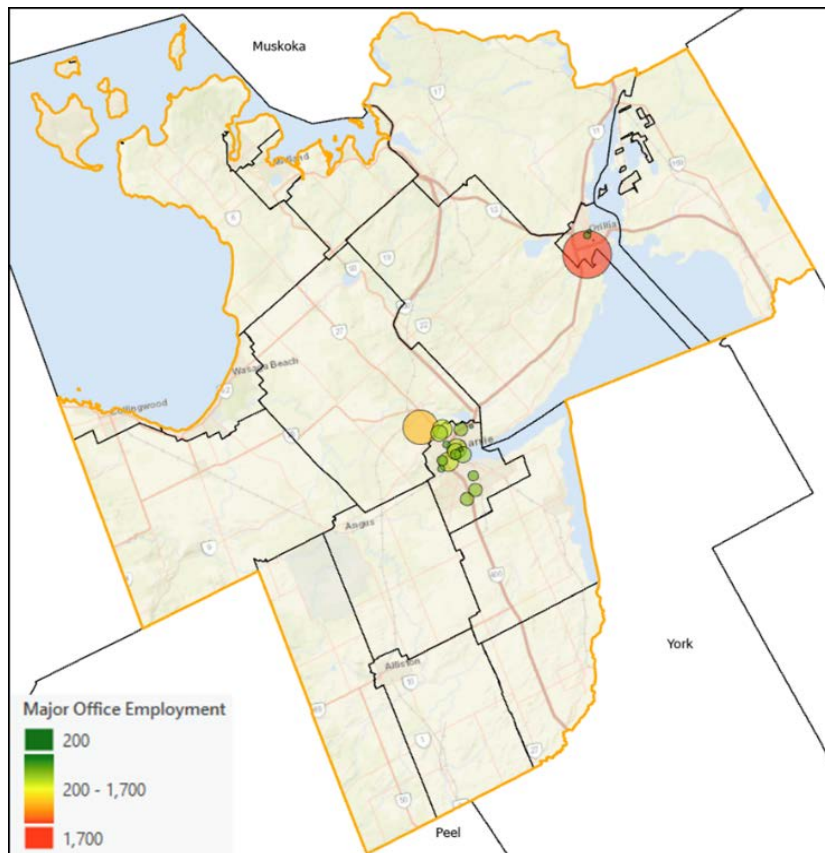
For LNA, Employment is Categorized Based on Land Use

Employment Category	Economic Sectors in Simcoe County	Implications for Planning and Allocation
Major office	Public administration, information, financial services, real estate, professional and technical firms	Requires highway access and, in heavily urbanized areas, access to transit.
Population-related	Primarily serves local residents (permanent and seasonal): retail, accommodation, food, education, health care, local government, and work-at-home jobs	Generally planned for through community plans focused on residential areas.
Employment land	Manufacturing, wholesale, transport, construction	Accommodated primarily in low-rise industrial-type buildings, mostly in business parks and industrial areas.
Rural	Agriculture, aggregates, small-scale manufacturing and construction, tourism, recreation	Located outside urban land designated for industrial or commercial use

Employment Has Very Specific Locational Requirements

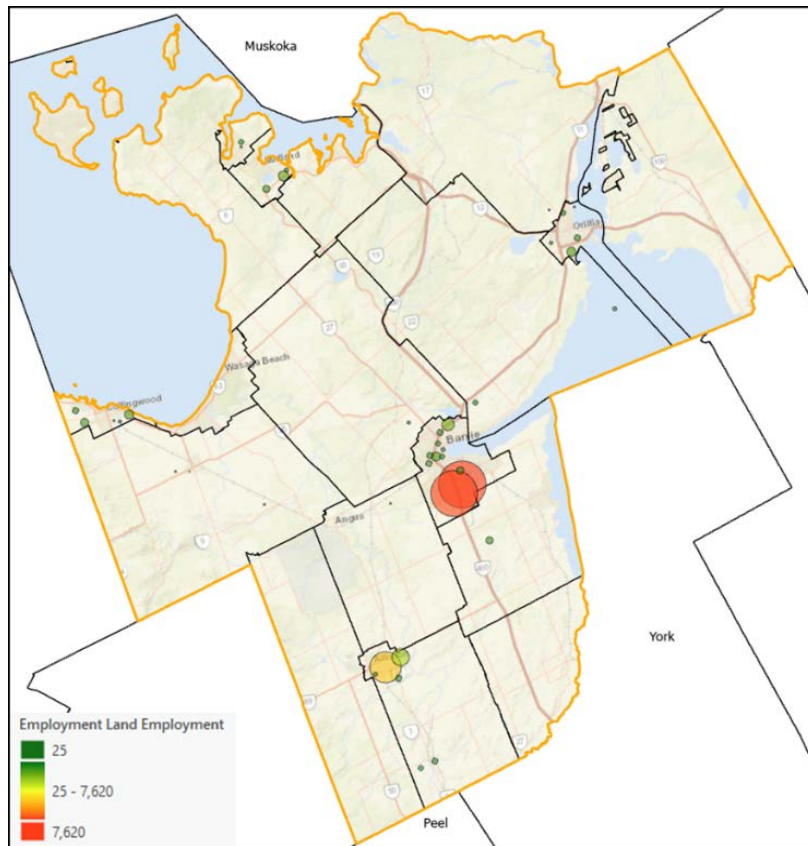
1. **Major Offices** require highway access and, in heavily urbanized areas, access to transit

2. **Population-related** planned for through community plans focused on residential areas

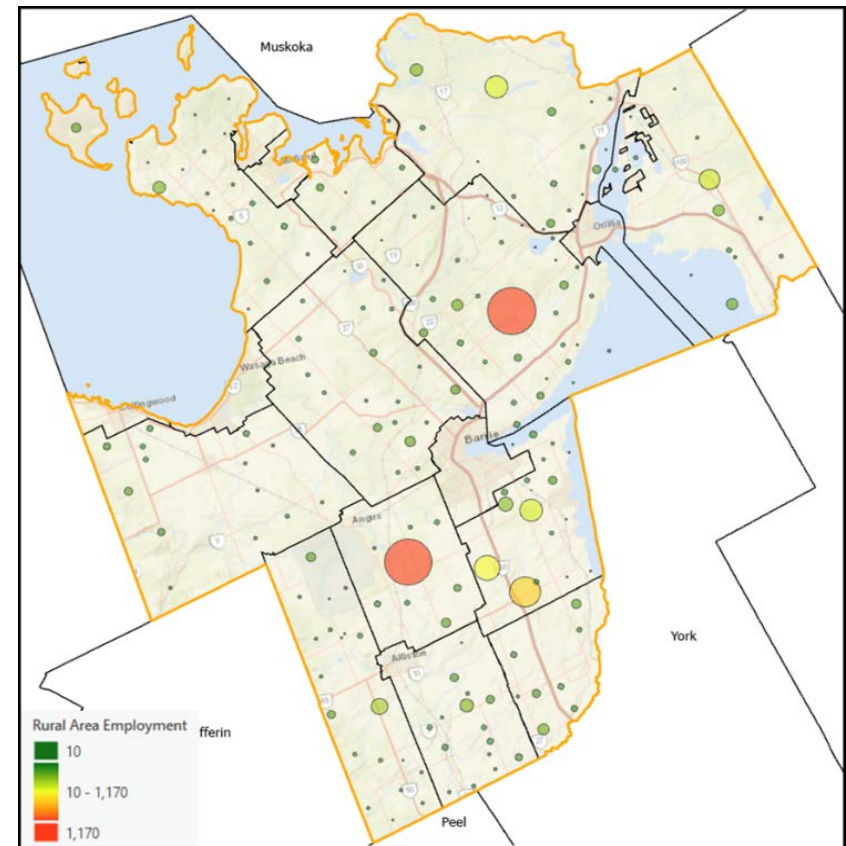


Employment Has Very Specific Locational Requirements

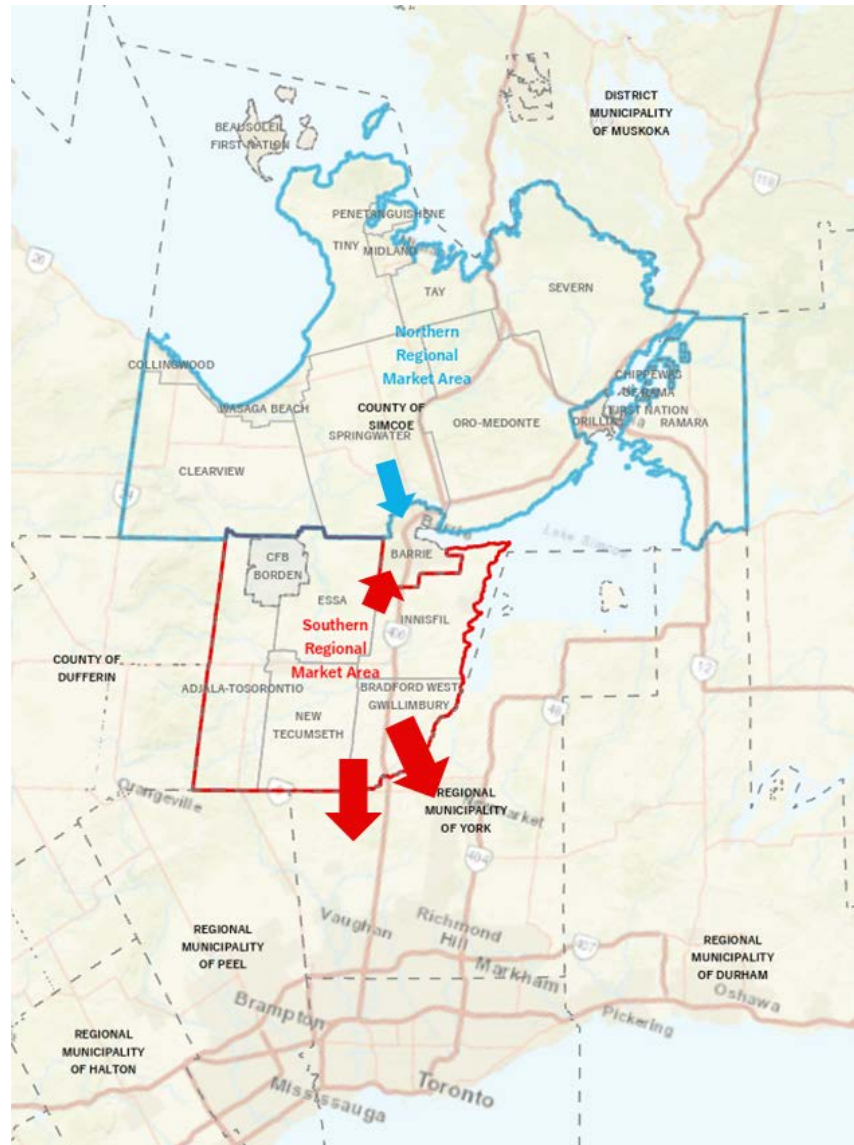
3. **Employment Land** in low-rise industrial-type buildings, mainly in business parks & industrial



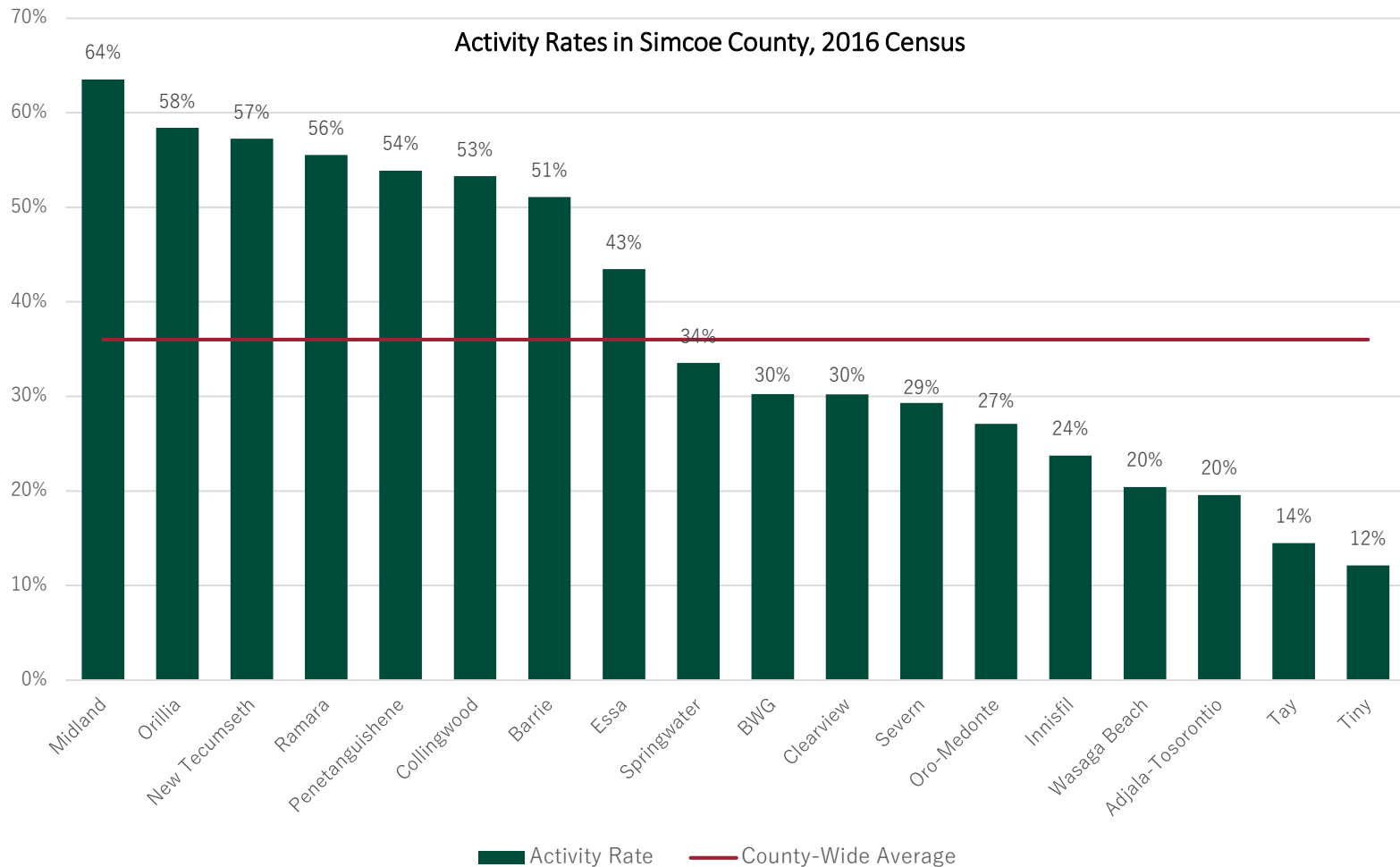
4. **Rural Employment**, outside urban land designated for industrial or commercial use



Commuting Patterns Are Very Different Between North and South



Uneven Distribution of People and Jobs Leads to Wide Range of Activity Rates

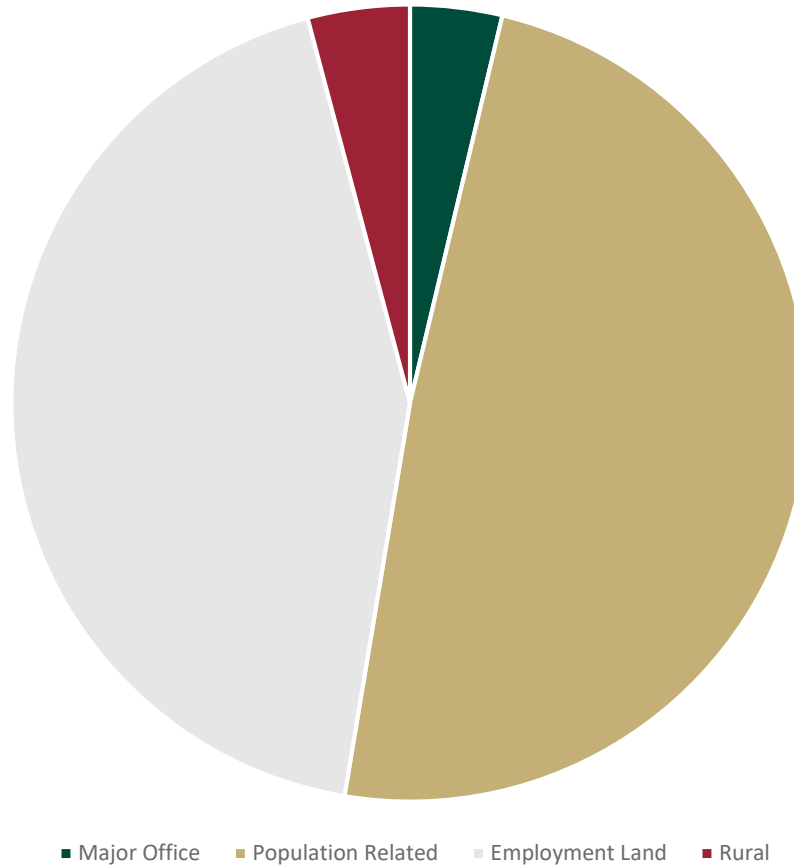


Employment Distribution by Local Municipality

Municipality	2021	2051	2021-51	2021-51
Adjala-Tosorontio	2,130	2,490	360	17%
Bradford West Gwillimbury	14,270	28,310	14,040	98%
Clearview	4,350	6,290	1,940	45%
Collingwood	12,260	19,600	7,340	60%
Essa	10,240	13,090	2,850	28%
Innisfil	9,980	30,270	20,290	203%
Midland	10,760	13,170	2,410	22%
New Tecumseth	20,750	31,620	10,870	52%
Oro-Medonte	5,900	11,410	5,510	93%
Penetanguishene	4,830	5,970	1,140	24%
Ramara	5,380	7,420	2,040	38%
Severn	4,020	5,640	1,620	40%
Springwater	6,700	9,190	2,490	37%
Tay	1,570	2,610	1,040	66%
Tiny	1,570	2,390	820	52%
Wasaga Beach	4,960	8,510	3,550	72%
Simcoe County	119,670	197,980	78,310	65%

Employment by Type Across the County

Forecast Employment by Type to 2051, County of Simcoe



What Happens if the Forecasts Are Wrong?

- We are planning to 2051—County Official Plan will not have growth targets for interim years
- Regular updates are required
- Most short-term growth will take place on lands already approved for development
- Infrastructure can be oversized for post-2051 development
- No formal mechanism to “shut down” development just because forecasts are exceeded
- Importantly, most planning decisions about how communities *look* and *feel* will be done at local level

What if Growth Allocations Cannot be Serviced?

- Provincial policies direct growth to settlement areas that have existing or planned systems
 - County *W&WW Service Delivery Review* shows most lower-tiers show deficits in either water or wastewater capacity or both
- Additional analysis identifies potential “ultimate” constraints (technological, environmental, financial)
- Where potential constraints exist:
 - Lower-tier municipalities will need to investigate (with MECP)
 - County Official Plan may include phasing policies
 - Reallocation of growth at next MCR a possibility

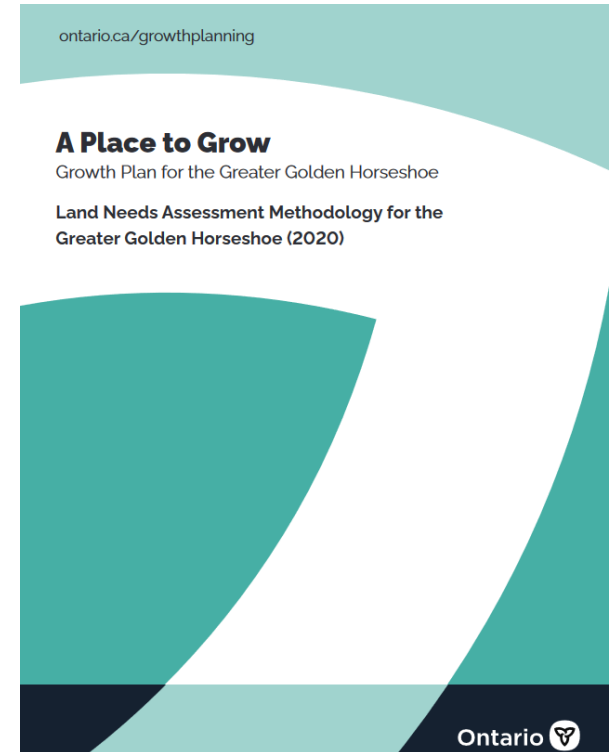
PART 2 – LAND NEEDS ASSESSMENT

LNA is a Critical MCR Component

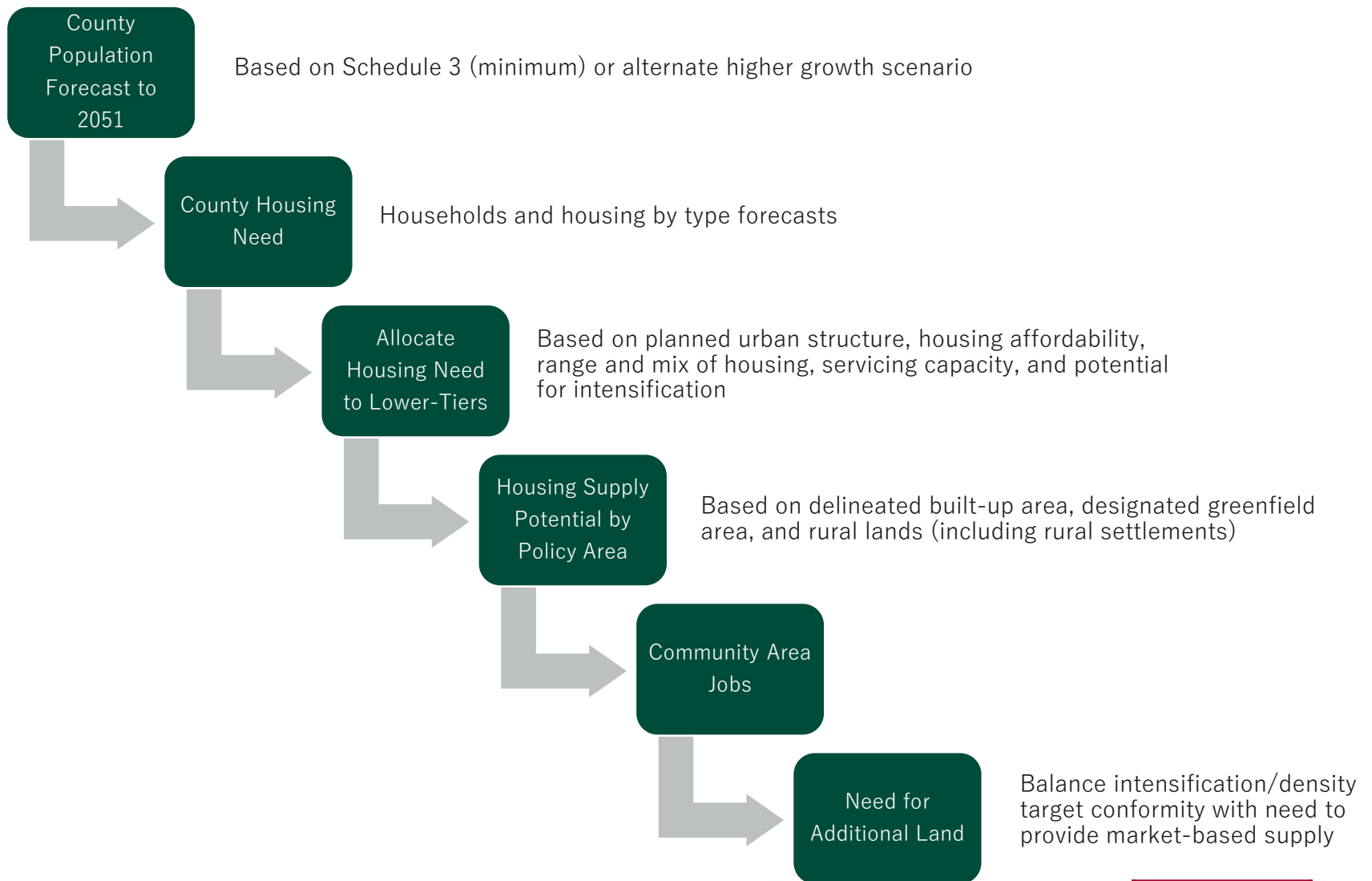
- Population and employment growth to 2051 established by Growth Plan
- Quantity of land required to accommodate growth must be assessed using prescribed Methodology
- County:
 - must consult with lower-tiers and engage Indigenous partners
 - encouraged to engage with public, stakeholders, and Province

Methodology Introduces Important Changes to LNA Process

- housing supply and demand to be analyzed in terms of total housing and **housing by type**
- **market contingency factors** to be considered in determining available land supply
- **“market-based supply of housing”** to be provided to the extent possible while achieving Growth Plan policy targets



Methodology for Community Area LNA



What is a Regional Market Area?

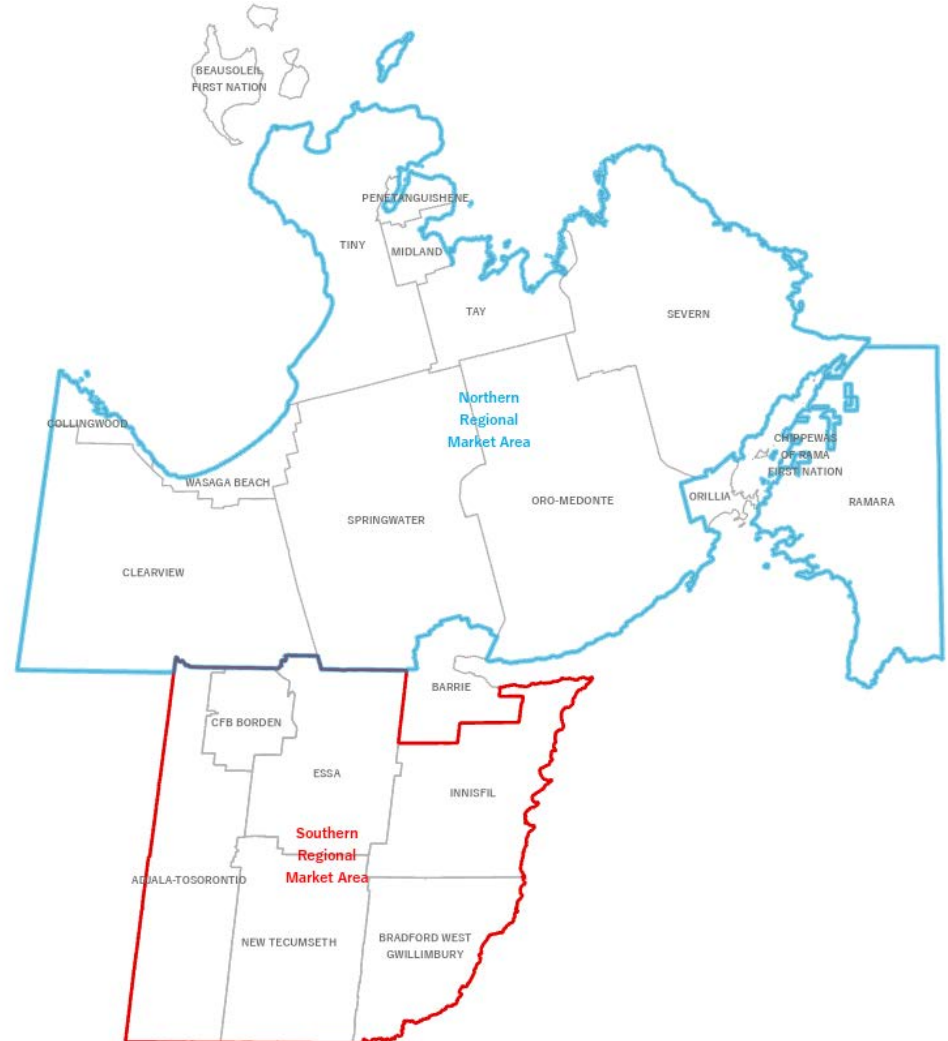
- PPS and Growth Plan require that in dealing with planning matters, population, housing, and employment projections be based on “regional market areas”
- County’s regional market area effectively fixed by Schedule 3—but this makes achieving goals of Section 6 of Growth Plan very difficult
- Under PPS, where regional market areas are large and diverse, a smaller area, if defined in an official plan, may be used

Simcoe County Does Not Exhibit Characteristics of a Single Market Area

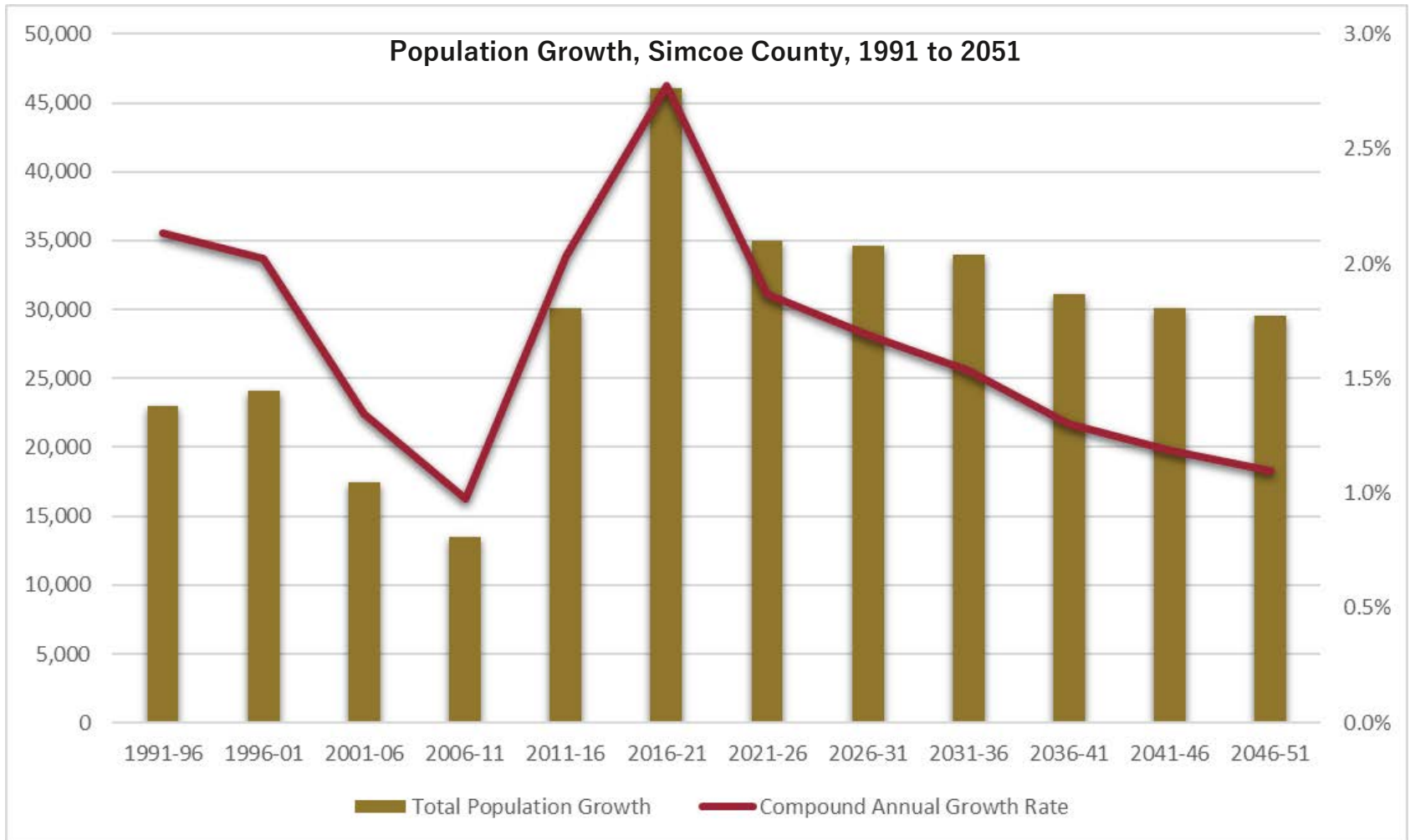
- Analysis in Part 1 shows that growth dynamics in “Northern” part of County are very different from “Southern” Simcoe
- Cannot simply “re-allocate” growth from southern municipalities to northern municipalities
- In order to achieve Growth Plan forecasts, settlement areas in southern part of County need to
 - plan for continued growth
 - expand boundaries

Two Regional Market Areas Helps Achieve Growth Plan Vision

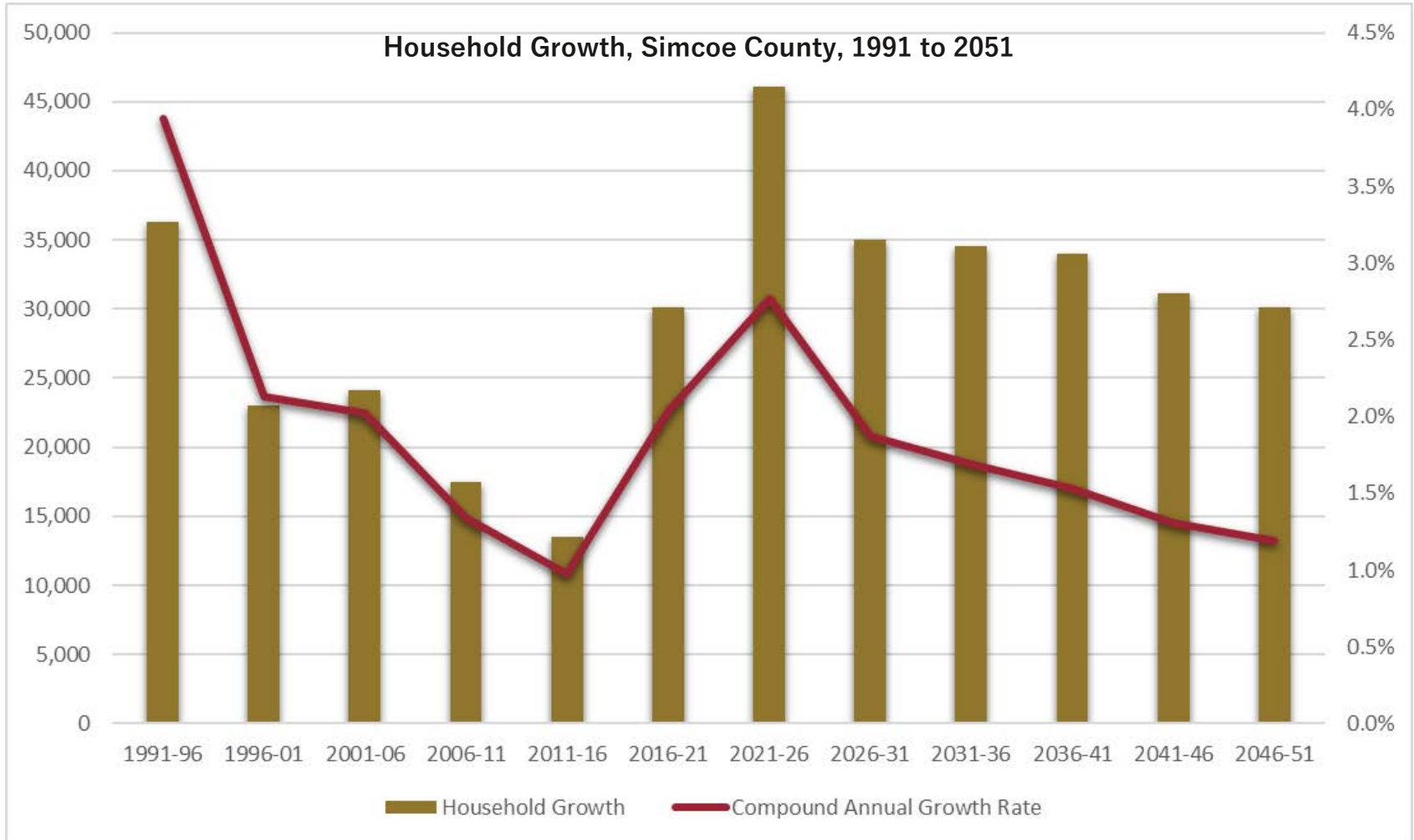
- Directs significant growth to:
 - Primary Settlement Areas per Growth Plan
 - 2 large Strategic Employment Areas (Bradford, Innisfil Heights)
- Promotes sustainable infrastructure and financial planning



Community Area LNA Step 1 – Simcoe Historical and Forecast Population

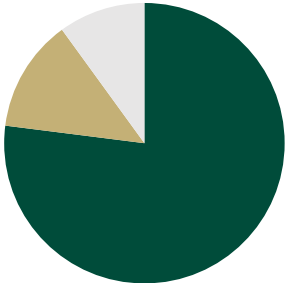


Community Area LNA Step 2 – Translate County Population Into Households



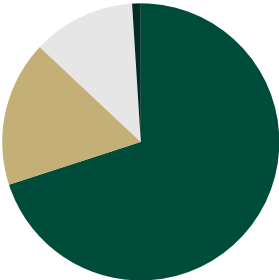
Translate Households Into Housing

Historical Housing Mix



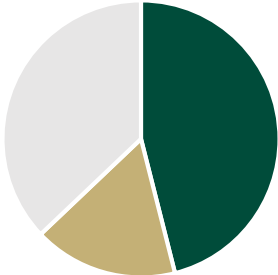
■ Singles/Semis ■ Rows ■ Apartments ■ Accessory

Market Demand Housing Mix



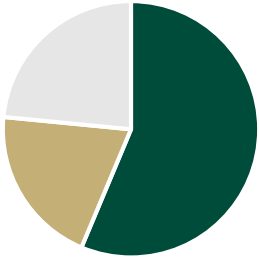
■ Singles/Semis ■ Rows ■ Apartments ■ Accessory

Policy Housing Mix (Southern RMA)



■ Single/Semi ■ Row ■ Apartment

Policy Housing Mix (Northern RMA)



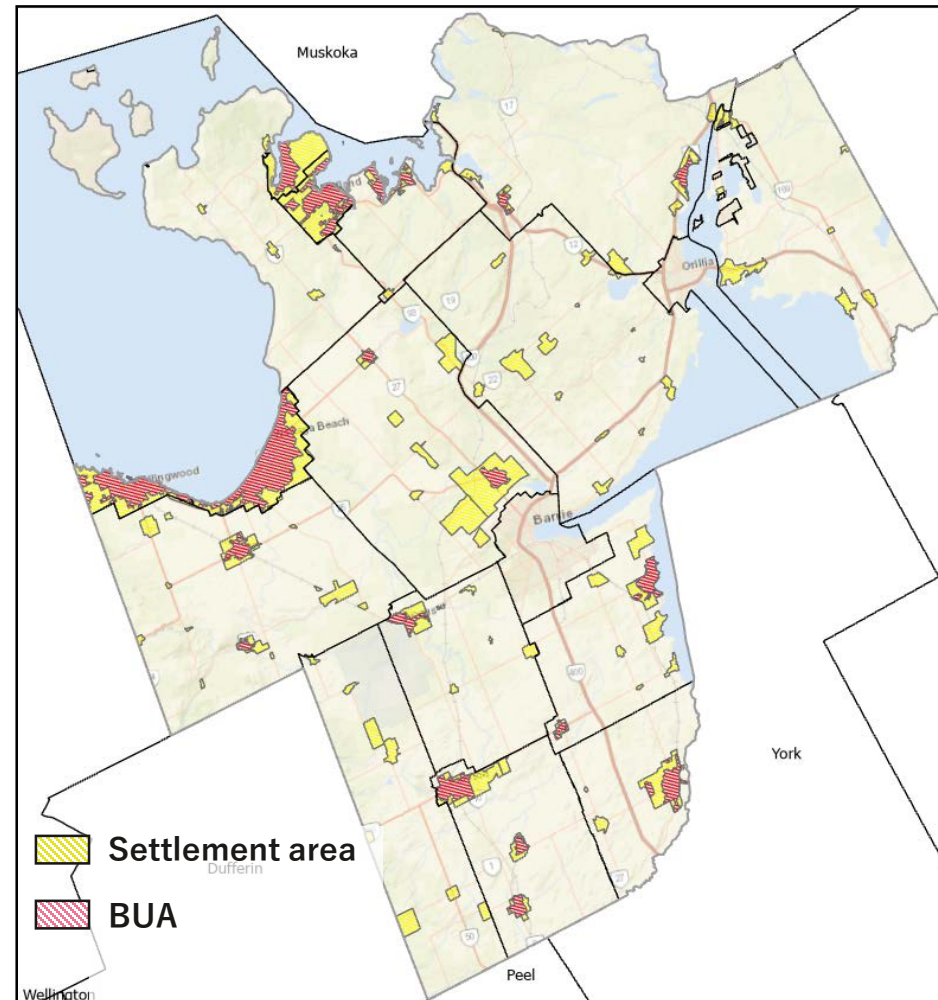
■ Single/Semi ■ Row ■ Apartment

Community Area LNA Step 4 – Housing Supply Potential by Policy Area

- **Rural Area** – limited to legacy rural estate subdivisions, vacant land and redevelopment of rural settlements, construction on existing lots of record
- **Built-Up Area (BUA)** – defined by a Built Boundary, roughly represents limit of residential development in June 2006
- **Designated Greenfield Area (DGA)** – unbuilt lands within urban settlement areas that are designated for development

Growth Plan Sets Minimum Targets for Growth in the BUA and DGA

- **Intensification Target**
based on 32% of housing occurring annually within the BUA
- Minimum DGA **Density Target** of 40 residents and jobs combined per hectare by 2051



Summary of Intensification Targets

- Current Official Plan target of 32% established by Minister in 2012
- Proposal is to aim for higher overall rate of 36%

Local Municipality	2016 Official Plan	2022 LNA
Adjala-Tosorontio	20%	n/a
Bradford West Gwillimbury	40%	42%
Clearview	20%	30%
Collingwood	40%	50%
Essa	20%	30%
Innisfil	33%	33%
Midland	40%	50%
New Tecumseth	40%	37%
Oro-Medonte	20%	n/a
Penetanguishene	40%	50%
Ramara	20%	n/a
Severn	20%	20%
Springwater	15%	15%
Tay	20%	20%
Tiny	20%	n/a
Wasaga Beach	20%	50%
Southern RMA	n/a	36%
Northern RMA	n/a	35%
County Average	32%	36%

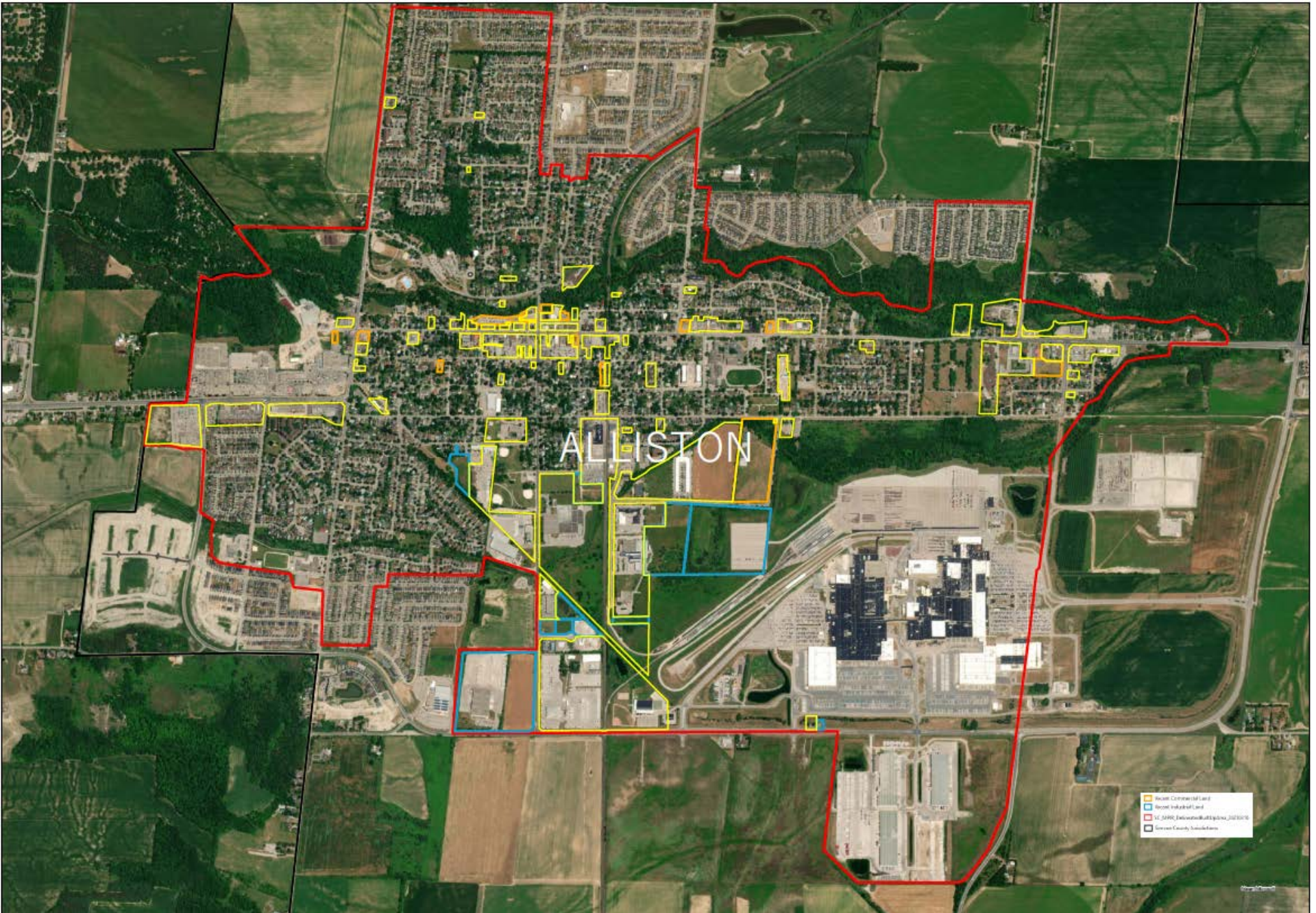
Current Intensification Rates Are Lower Than LNA Targets

Area	Intensification Rate 2016-2021	Proposed LNA Target
Southern RMA	8%	36%
Northern RMA	27%	35%
Simcoe County	18%	36%

- County-wide target is roughly double recent experience
- Targets are consistent with what is already occurring in Collingwood (37%), Midland (50%), Penetanguishene (52%), and Wasaga Beach (48%)
- In Southern RMA, targets represent more transformational change

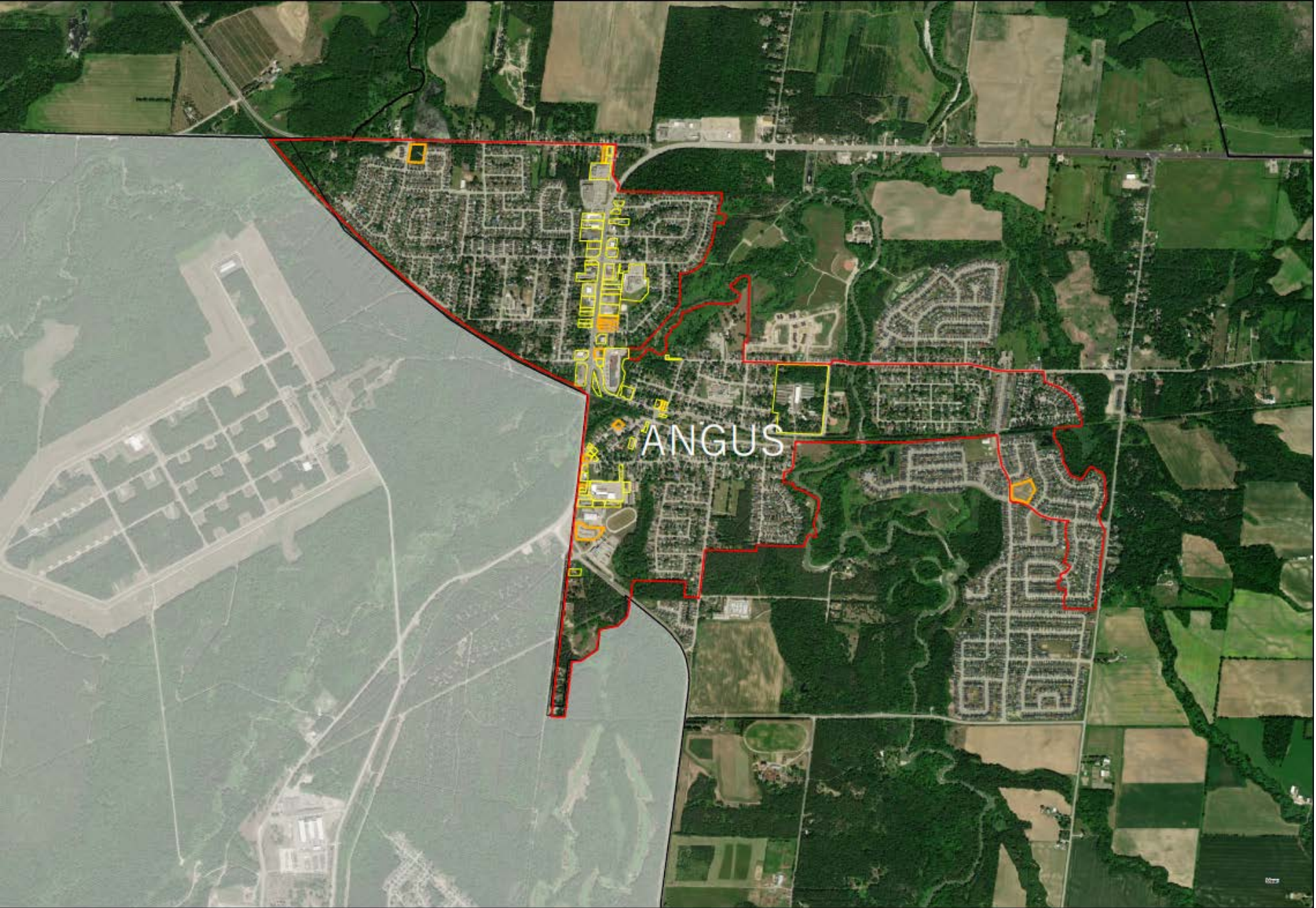
Lots of Potential For Redevelopment in Southern RMA

Community	Rowhouses		Apartments			Total Units
	Vacant Land	Infill	Secondary Suites	Mid-rise Infill	Seniors Homes	
Bradford	240	1,000	498	4,500	30	6,268
Angus	156	250	222	1,020	30	1,678
Alcona	20	13	350	1,680	60	2,123
Cookstown	80	105	22	2,400	60	2,667
Alliston	1,600	1,750	375	1,500	30	5,255
Beeton	200	125	68	1,026	30	1,449
Tottenham	200	168	98	1,200	30	1,696





BEETON



ANGUS

Intensification Targets Are Ambitious But Achievable

- Intensification can take many forms and will
 - meet housing needs of seniors, affordable, and attainable housing
 - allow for transit-oriented “complete” communities
- We have seen units constructed in the BUA
- Not all BUAs are equally suited to intensification
- Detailed planning required at local level to implement targets—challenges include height restrictions, cultural heritage, environmentally protected lands

Summary of DGA Density Targets – Residents and Jobs per Hectare

- Targets are consistent with existing plans of subdivision

Local Municipality	2016 Official Plan	2022 LNA
Adjala-Tosorontio	32	n/a
Bradford West Gwillimbury	35	55
Clearview	32	45
Collingwood	50	55
Essa	32	45
Innisfil	32	60
Midland	50	55
New Tecumseth	50	55
Oro-Medonte	32	n/a
Penetanguishene	50	55
Ramara	32	n/a
Severn	32	45
Springwater	32	45
Tay	32	45
Tiny	32	n/a
Wasaga Beach	32	55
Southern RMA	n/a	54
Northern RMA	n/a	47
County	39	51

Summary of Housing Supply Potential

Southern RMA	Single/Semi	Row	Apartment	Total
Delineated Built Up Area (BUA)	310	750	830	1,890
Designated Greenfield Area (DGA)	5,980	3,520	5,210	14,710
Rural Lands	5,850	1,210	390	7,450
Total Identified Supply	12,140	5,480	6,430	24,050
Total Identified Supply	50%	23%	27%	100%
Northern RMA	Single/Semi	Row	Apartment	Total
Delineated Built Up Area (BUA)	2,940	3,800	3,400	10,140
Designated Greenfield Area (DGA)	22,420	12,960	6,450	41,830
Rural Lands	19,220	1,370	340	20,930
Total Identified Supply	44,580	18,130	10,190	72,900
Total Identified Supply	61%	25%	14%	100%

County Needs Land for Housing in Southern RMA

At **36% intensification rate** across County and **greenfield density of 51 persons and jobs per hectare**, Community Area land needs are:

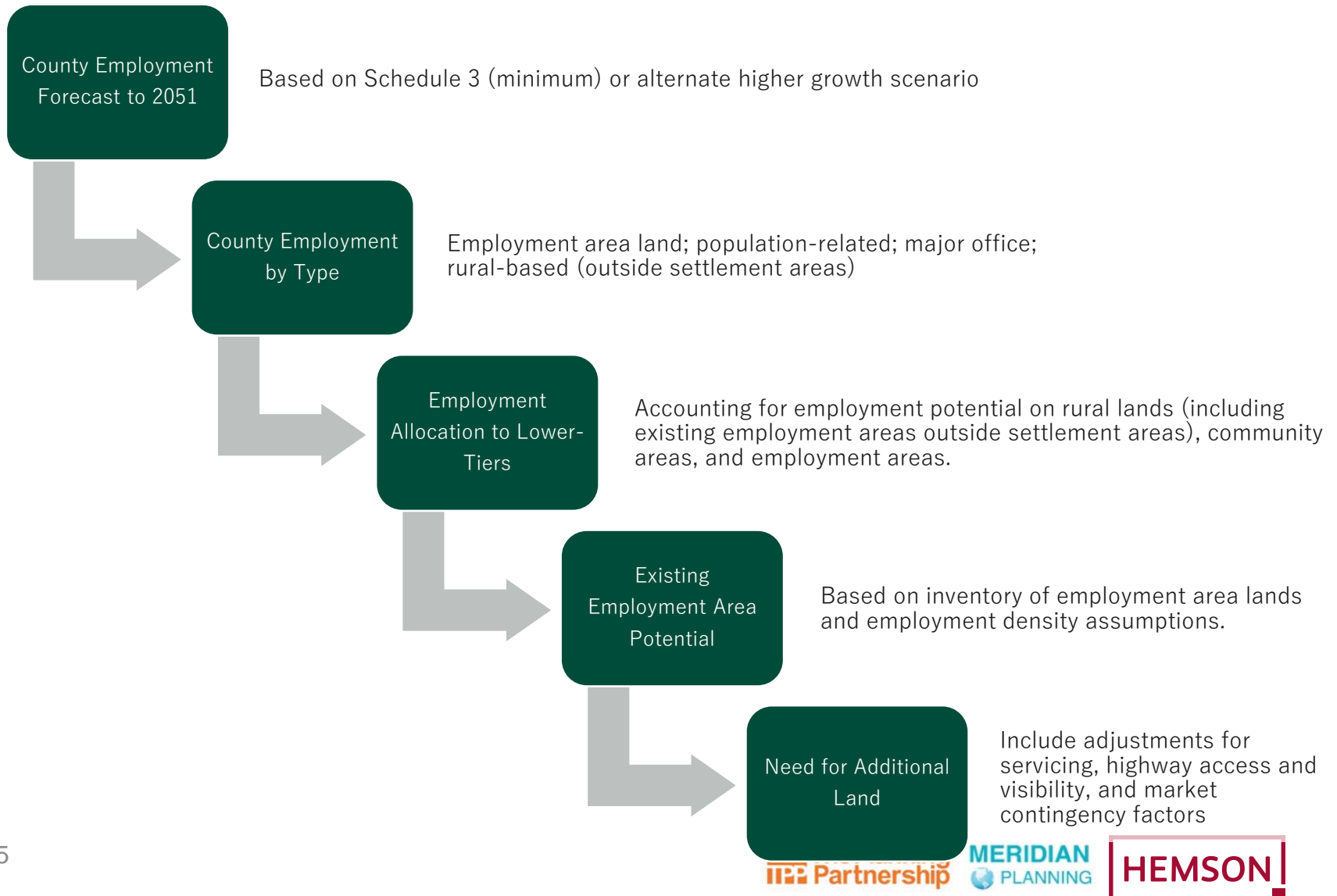


	Community Area Surplus/(Deficit)	
	Units	Land (ha)
Northern RMA	30,750	1,410
Southern RMA	(32,890)	(1,156)
Simcoe County	2,140	254

Community Area Land Needs in Southern RMA

	Innisfil	Bradford West Gwillimbury	Essa	New Tecumseth	Adjala-Tosorontio	Total
New DGA Units	1,483	7,122	1,580	6,917	0	17,102
Persons and Jobs	4,212	27,645	6,064	24,662	0	62,583
DGA Density (p+j/ha)	60	55	45	55	n/a	0
Total Additional Land Need (ha)	70	503	135	448	0	1,156

Methodology for Employment Area LNA



Employment Allocations Supported by Technical Analysis

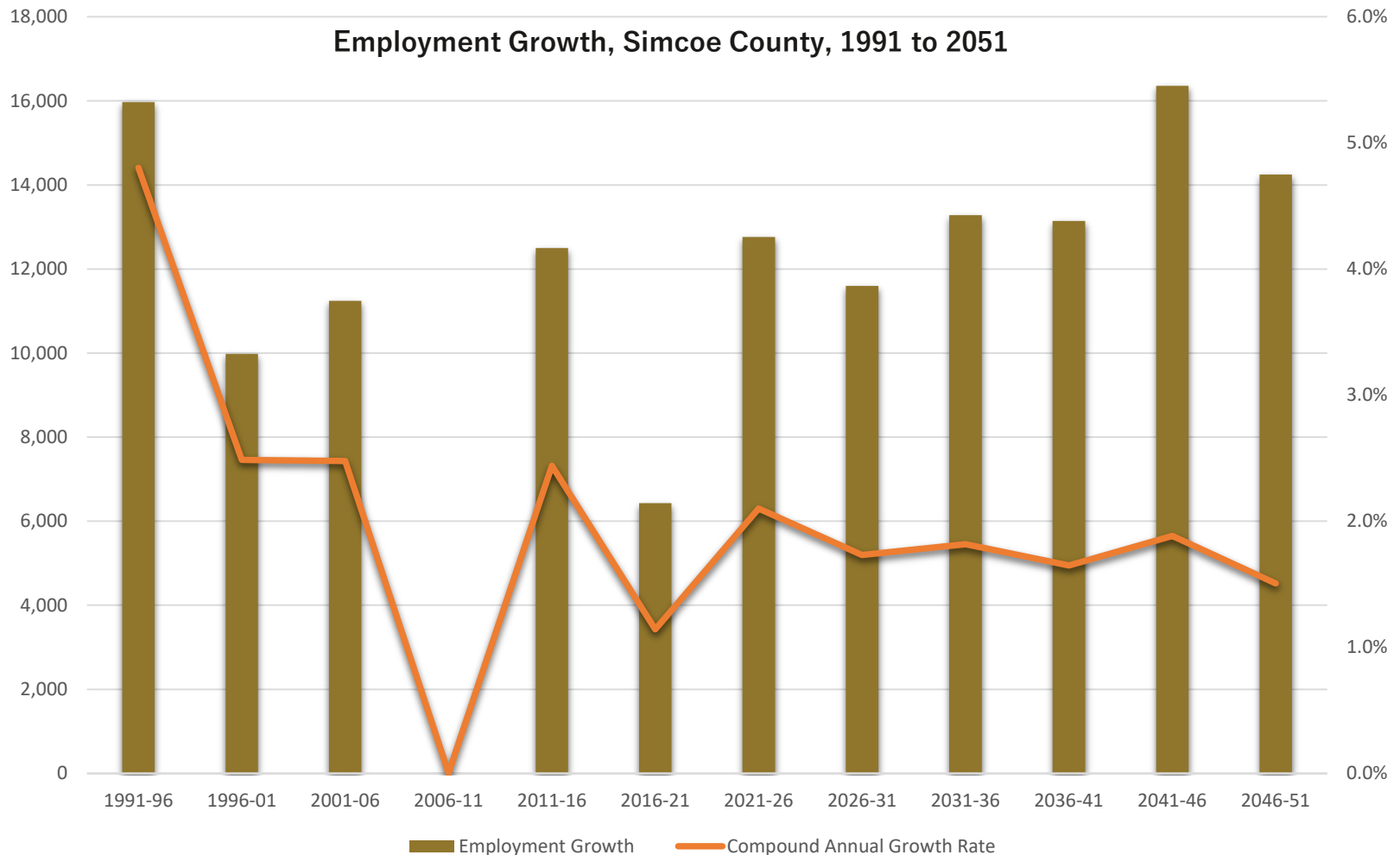
Employment Strategy

- Assess commercial retail and employment land opportunities based on market dynamics
- Implications of GP policy direction, especially “Strategic settlement employment areas” and “Economic employment districts”, also examined

Employment Density Analysis

- 20 jobs per net ha assumed for new Employment Area (somewhat higher than current densities)

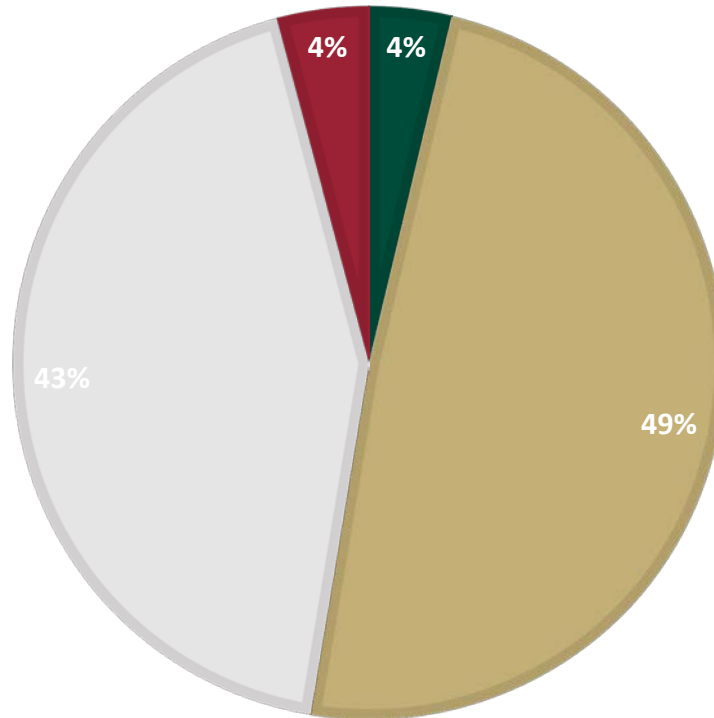
Employment Area LNA Step 1 – Simcoe Historical and Forecast Employment



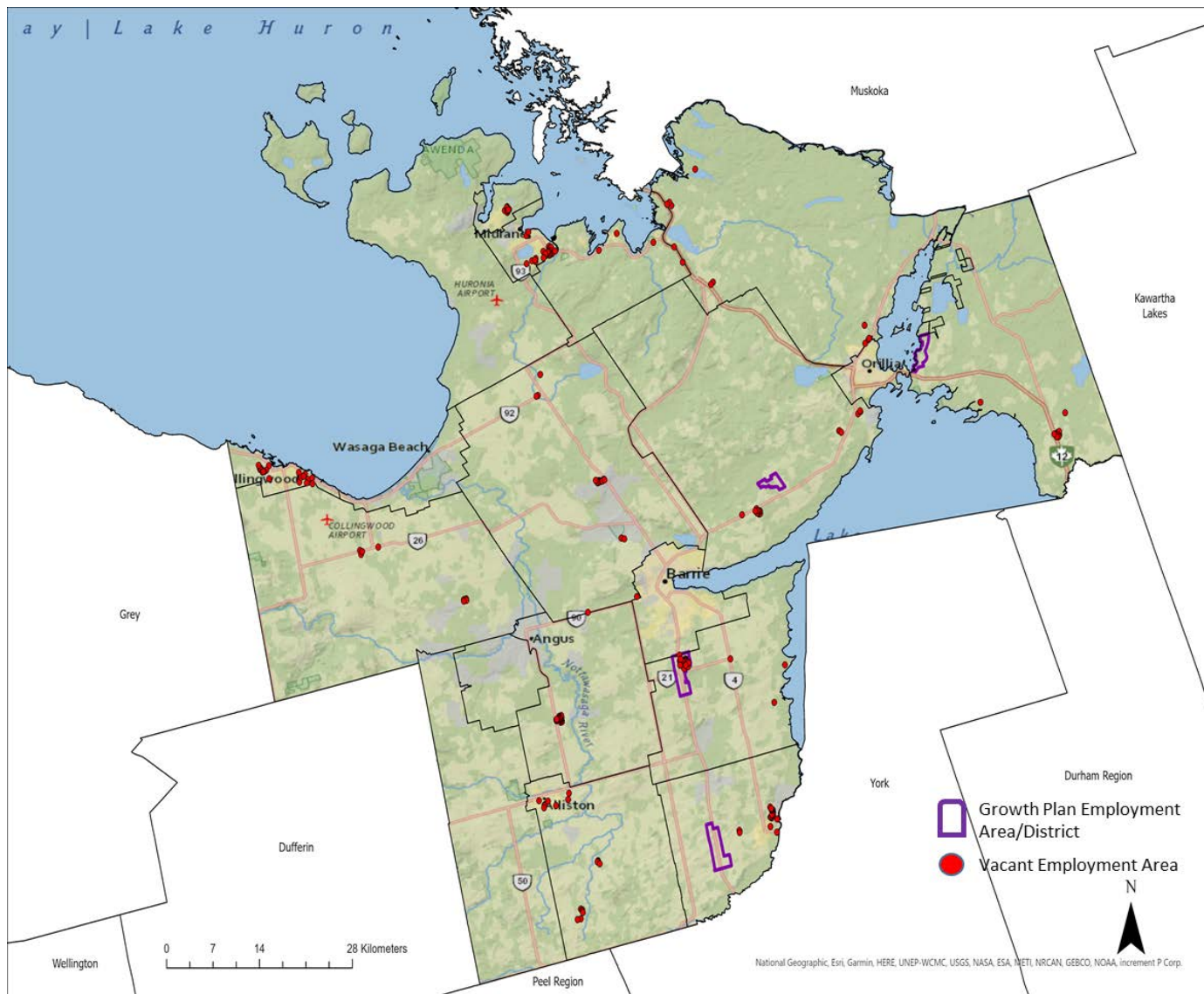
Employment by Type Across the County

FORECAST EMPLOYMENT BY TYPE TO 2051, COUNTY OF SIMCOE

■ Major Office ■ Population Related ■ Employment Land ■ Rural



Existing Employment Supply in Simcoe



Employment Land is Needed Across the Entire County

	Employment Area Surplus/(Deficit)	
	Jobs	Land (ha)
Northern RMA	(4,976)	(323)
Southern RMA	(2,730)	(177)
Simcoe County	(7,706)	(501)

Employment Area Land Needs in Northern RMA

Employment Land Employment	Clearview	Collingwood	Wasaga Beach	Remainder	Total
Growth 2021-2051	801	4,409	1,119	8,901	15,230
Capacity of Existing Supply	206	1,166	0	8,882	10,254
Sufficiency of Supply	(595)	(3,243)	(1,119)	(19)	(4,976)
Total Land Need (ha)	(39)	(211)	(73)	0	(323)

Employment Area Land Needs in Southern RMA

Employment Land Employment	New Tecumseth	Remainder	Total
Growth 2021-2051	4,380	14,730	19,110
Capacity of Existing Supply	1,762	14,618	16,380
Sufficiency of Supply	(2,618)	(112)	(2,730)
Total Land Need (ha)	170.2	0	170.2

Overall Conclusions of LNA:

1. Employment Area Needed Across the County (Northern and Southern RMAs)
2. Community Area for New Housing Needed Only in the Southern RMA

LNA Results Are Rooted In...

1. All municipalities growing
2. More “complete” communities focussed on transit-oriented development
3. More compact built form, with denser and more affordable housing
4. Greater range and mix of housing
5. Less land consumption than under current development patterns

PART 3 – IMPLEMENTATION

Update on Natural Heritage System and Agricultural System Mapping

Next Steps

- Co-ordinate with Water/Wastewater Servicing Strategy and finalize technical reports and mapping
- Decision making by County Council
 - Phase 1 – Approve forecasts and land needs
 - Statutory Public Meeting and Open House are scheduled for June
 - Possible separate OPA for PMTSA in Innisfil
 - August 8 – final approval
 - Phase 2 – Approve settlement area expansions and mapping
- Further opportunities for public review and input into MCR and updated OP through postings to MCR webpage and future statutory public meeting(s)

Innisfil Protected Major Transit Station Policy Area

- LNA Report identifies a theoretical land need
- County will need to work with local municipalities to assess feasibility and most appropriate location for any expansion to settlement areas
- Innisfil is proposing a Protected Major Transit Station Area policy area that would bring in the Orbit MZO as well as additional lands generally within 800m of the future GO Station