

## MEMORANDUM

**To:** Greg Marek  
**From:** Stefan Krzeczunowicz, Patrick Barbieri  
**Date:** March 23, 2021  
**Re:** Simcoe County – Update to Residential Land Budget

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This memorandum summarizes our updated residential land budget and Land Needs Assessment (LNA) for the County of Simcoe and its constituent lower-tier municipalities to 2031. The update incorporates all relevant data from the 2016 Census and land supply information updated to January 2020. The previous version of the County's residential LNA incorporated the Census data available at that time, which was only a partial data set of the 2016 Census and that update was based on December 2016 land supply information.

The update will provide a key start point for the County's Municipal Comprehensive Review (MCR), which is currently underway. The MCR, among many other matters, will extend the County's Official Plan growth forecast, growth management policies and land designations to a 2051 planning horizon. The MCR will bring the County official plan into conformity with the Provincial plan *A Place to Grow, Growth Plan for the Greater Golden Horseshoe, 2020* (Growth Plan) which came into effect on August 28, 2020 and that incorporates an updated population and employment forecast to 2051 for all of the Greater Golden Horseshoe, including the County of Simcoe.

Amendment 1 also eliminated Schedule 7 in the Growth Plan and its related policies. The next version of the LNA to be prepared as part of the MCR will only have reference to the County total population and employment at 2051. However, for the purposes of this update, the former Schedule 7 forecasts are maintained.

The Province also recently replaced the 2018 *Land Needs Assessment Methodology* with the *Land Needs Assessment Methodology for the Greater Golden Horseshoe, 2020* that will be the basis for the LNA work undertaken for the forthcoming MCR. The new 2020 LNA changes some methods, though not in ways that would significantly affect the structure of this Simcoe County LNA. However, there are policy changes too. The coming MCR work will need to take account of the significant policy changes concerning rural and built-up areas and the measurement of intensification rates. The current structure of the Simcoe LNA and

the intensification rates in the *Simcoe County Official Plan* are based on the original Growth Plan that included both delineated and undelineated built-up areas as the areas where the official plan intensification rates applied. This approach is maintained in the current update. The MCR will need to shift to the new Growth Plan approach of intensification rates being assigned only to the delineated built-up area, meaning that the former undelineated built up areas become rural settlement areas and growth in these locations will become part of the rural allocation rather than being inside the built up area. The municipal intensification rates would also need, at minimum, to be restated to the new definition. Again, this is work to come at a later date in the MCR, and had not been addressed in this update.

A similar update to the County's employment LNA will be completed at a later date, although there have not been any significant policy changes affecting the structure of the employment LNA.

This memorandum has been updated since it's original release on October 26, 2020 to reflect corrected land supply information.

## **A. UPDATES TO KEY INPUTS HAVE BEEN MADE**

The following inputs and assumptions have been updated for this version of the residential LNA.

### **i. Updated Land Supply**

- The land supply for each lower-tier municipality was extracted from County records and grouped by policy area: inside the Built Boundary (Delineated and Undelineated); within Designated Greenfield Area; and Rural. As an initial step to conform to the new Growth Plan, delineated and un-delineated built up areas are now not distinguished in the updated Simcoe LNA, though the housing unit demand and supply within that category as well as the intensification rate still includes the undelineated Built Up Areas.
- In addition to allocating the land supply by policy area, an analysis was undertaken to determine the general timing of development. This included allocating actual unit counts in each municipality based on plans of subdivision at various stages of development (i.e. registered, draft approved, and proposed). For lands that do not currently have a plan of subdivision, but represent future development areas, the population was determined by using updated persons per unit estimates.

## **ii. Updated Building Permits**

- As provided by the County, updated building permit information is complete to December 31, 2019 and has been incorporated into the update. Development for which building permits have been issued is considered part of the growth in units to 2019 from a 2016 Census base. For the purposes of this analysis, it is assumed that the units have become occupied by usual residents.

## **iii. Updated Seasonal and Vacant Unit Estimates**

- While it is unknown exactly what the split between vacant and seasonal units are, an estimate has been made for each municipality. It is known, from the 2016 Census, how many total units compared to units occupied by usual residents there are, which provides a relationship to carry forward to 2031. A further, more comprehensive analysis should be undertaken to have a better understanding of the seasonal demand elements that will occur in the 30 year forecast period now allowed for municipalities to plan to.

## **iv. Updated Demand Estimates**

- Based on the updated supply analysis, estimates of housing demand by policy area were updated. Comparisons between the current and previous analysis will need to account for the newly defined built up area noted above.

## **v. Updated Population**

- Since the previous land budget, Statistics Canada has updated the 2016 total population that includes Census net-undercoverage. These new figures are reflected in the updated LNA and results in a small adjustment to the amount of population and housing growth forecast to 2031 in each municipality is forecast to achieve by 2031.
- Furthermore, Statistics Canada has released the total populations for all census subdivisions in Ontario. This allows for the growth to 2031 to be realized from actual 2019 data.
- The forecast 2031 population by policy area is determined by applying a person per unit to the housing demand estimate,

## **B. LNA RESULTS**

The residential LNA results are set out in Tables 1 (for each municipality) and 2 (for each policy area). Table 1 shows that each municipality has an overall surplus of land to 2031.

However, as seen in Table 2, some municipalities will run out of land in certain policy areas by 2031.

As seen in the detailed results (Table 2), there are three municipalities that show land shortfalls by the 2031 horizon. The following are of particular note:

1. New Tecumseth: There is a shortfall of about 2,300 units from the identified intensification supply. This will need to be addressed in the coming MCR either by identification of additional supply potential or by reducing the intensification rate. Of course, that will also be for a 30 year period, rather than 10 years, and will become a somewhat different undertaking from both a supply and demand perspective.
2. Essa: The 2031 population forecast horizon for Essa is less than the 2019 total population estimate. Therefore, a revised growth outlook based on recent building permit activity and local knowledge was devised. It is assumed, that in the full MCR, a more detailed estimate will be made. Essa also presently shows a minor deficit in the DGA; this should also be addressed in the full MCR.
3. Midland: Presently nearly all of Midland's development has been within the built-up areas, despite having significant potential in the DGA. The coming MCR will *de facto* reallocate some of this growth to the available supply in the DGA as well as identifying additional intensification potential in the built up area. In the MCR, these shifts will be embedded with in a fully revised set of expectations for demand and supply over the 30 year planning period.
4. Bradford West Gwillimbury: There is insufficient supply in both the DGA and intensification areas. There is, however, excess supply in the rural areas of the municipality. A detailed review of the land supply in Bradford West Gwillimbury will be undertaken as part of the County's MCR process.

**Table 1 - Simcoe Residential Land Budget by Municipality 2019-2031**

Municipality	Population Growth	Demand: Housing Units Needed	Supply: Housing Unit Potential	Difference
Adjala-Tosorontio	1,350	570	2,920	2,360
Bradford West Gwillimbury	7,530	4,680	3,280	(1,400)
Clearview	4,910	1,630	11,180	9,540
Collingwood	9,420	3,910	17,730	13,810
Essa	4,180	1,460	1,680	220
Innisfil	15,260	5,580	8,300	2,720
Midland	4,560	2,150	7,910	5,750
New Tecumseth	14,560	6,560	4,380	(2,180)
Oro-Medonte	3,700	1,570	2,070	500
Penetanguishene	1,810	680	2,410	1,730
Ramara	2,620	1,460	3,650	2,190
Severn	2,030	600	3,280	2,670
Springwater	2,990	970	16,760	15,790
Tay	330	100	2,620	2,520
Tiny	1,060	330	2,450	2,120
Wasaga Beach	4,010	1,550	8,120	6,570
<b>Municipal Simcoe County</b>	<b>80,310</b>	<b>33,810</b>	<b>98,730</b>	<b>64,920</b>

**Table 2 - Simcoe Residential Land Budget by Policy Area 2019-2031**

Municipality	Population Growth	Demand: Housing Units Needed	Supply: Housing Unit Potential	Difference
<b>Adjala-Tosorontio</b>	<b>1,348</b>	<b>568</b>	<b>2,924</b>	<b>2,356</b>
Built-Up Areas	1,285	540	2,645	2,105
Designated Greenfield Areas	0	0	0	0
Rural Areas	63	28	279	251
<b>Bradford West Gwillimbury</b>	<b>7,532</b>	<b>4,680</b>	<b>3,283</b>	<b>(1,397)</b>
Built-Up Areas	2,768	1,872	1,527	(345)
Designated Greenfield Areas	4,694	2,761	1,035	(1,726)
Rural Areas	70	47	721	674
<b>Clearview</b>	<b>4,913</b>	<b>1,634</b>	<b>11,176</b>	<b>9,542</b>
Built-Up Areas	991	327	5,529	5,202
Designated Greenfield Areas	3,677	1,226	5,326	4,100
Rural Areas	245	82	321	239
<b>Collingwood</b>	<b>9,419</b>	<b>3,911</b>	<b>17,725</b>	<b>13,814</b>
Built-Up Areas	3,553	1,564	4,875	3,311
Designated Greenfield Areas	5,866	2,346	12,850	10,504
Rural Areas	0	0	0	0
<b>Essa</b>	<b>4,180</b>	<b>1,458</b>	<b>1,680</b>	<b>222</b>
Built-Up Areas	682	292	367	75
Designated Greenfield Areas	3,454	1,151	1,091	(61)
Rural Areas	44	15	222	207
<b>Innisfil</b>	<b>15,257</b>	<b>5,580</b>	<b>8,303</b>	<b>2,724</b>
Built-Up Areas	4,098	1,841	2,452	611
Designated Greenfield Areas	10,880	3,627	5,176	1,549
Rural Areas	279	112	675	563
<b>Midland</b>	<b>4,564</b>	<b>2,152</b>	<b>7,906</b>	<b>5,754</b>
Built-Up Areas	1,594	861	695	(166)
Designated Greenfield Areas	2,970	1,291	7,211	5,920
Rural Areas	0	0	0	0
<b>New Tecumseth</b>	<b>14,561</b>	<b>6,555</b>	<b>4,378</b>	<b>(2,177)</b>
Built-Up Areas	5,728	2,622	318	(2,304)
Designated Greenfield Areas	8,702	3,868	3,987	119
Rural Areas	131	66	73	7

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Municipality	Population Growth	Demand: Housing Units Needed	Supply: Housing Unit Potential	Difference
<b>Oro-Medonte</b>	<b>3,696</b>	<b>1,570</b>	<b>2,067</b>	<b>497</b>
Built-Up Areas	3,523	1,492	1,485	(7)
Designated Greenfield Areas	0	0	0	0
Rural Areas	173	79	582	503
<b>Penetanguishene</b>	<b>1,808</b>	<b>685</b>	<b>2,410</b>	<b>1,725</b>
Built-Up Areas	576	274	868	594
Designated Greenfield Areas	1,232	411	1,542	1,131
Rural Areas	0	0	0	0
<b>Ramara</b>	<b>2,620</b>	<b>1,464</b>	<b>3,654</b>	<b>2,190</b>
Built-Up Areas	2,474	1,391	3,369	1,978
Designated Greenfield Areas	0	0	0	0
Rural Areas	146	73	285	212
<b>Severn</b>	<b>2,029</b>	<b>602</b>	<b>3,276</b>	<b>2,675</b>
Built-Up Areas	344	120	620	499
Designated Greenfield Areas	1,580	451	2,454	2,002
Rural Areas	105	30	203	173
<b>Springwater</b>	<b>2,993</b>	<b>975</b>	<b>16,762</b>	<b>15,787</b>
Built-Up Areas	413	146	4,401	4,255
Designated Greenfield Areas	2,433	780	10,902	10,122
Rural Areas	146	49	1,459	1,410
<b>Tay</b>	<b>330</b>	<b>97</b>	<b>2,616</b>	<b>2,519</b>
Built-Up Areas	58	19	1,985	1,965
Designated Greenfield Areas	255	73	235	162
Rural Areas	17	5	396	391
<b>Tiny</b>	<b>1,055</b>	<b>330</b>	<b>2,449</b>	<b>2,119</b>
Built-Up Areas	593	198	353	155
Designated Greenfield Areas	0	0	0	0
Rural Areas	462	132	2,096	1,964
<b>Wasaga Beach</b>	<b>4,007</b>	<b>1,549</b>	<b>8,123</b>	<b>6,573</b>
Built-Up Areas	722	310	1,511	1,201
Designated Greenfield Areas	3,285	1,240	6,612	5,372
Rural Areas	0	0	0	0