

MEMORANDUM

To: Nathan Westendorp, Dan Amadio, and Greg Marek, County of Simcoe

From: Stefan Krzeczunowicz

Date: May 31, 2022

Re: Revised County of Simcoe Growth Forecasts and Land Needs Assessment

The report *County of Simcoe Growth Forecasts and Land Needs Assessment* (County LNA Report) was released on March 31, 2022 as background research for the County of Simcoe's Municipal Comprehensive Review. The report establishes the long-term growth outlook for the County based on a 30-year time horizon and population and employment forecasts prescribed by the Provincial Plan *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (the Growth Plan). It also determines the amount of urban land required to accommodate the growth outlook using an approach that divides the County into a Southern Regional Market Area and a Northern Regional Market Area (or RMA).

Following additional consultation and review with local municipalities, revisions have been made to the forecasts and land needs assessment. The revisions are limited in scope, and arise mainly from refinements to land supply information in specific locations and a reallocation of employment growth to the Bradford West Gwillimbury Strategic Settlement Employment Area. However, due to the integrated nature of the forecasts, the nature of the revisions affects the forecasts for some other areas in the County.

The revised forecast results for the entire County are provided in this memorandum. They replace the forecasts and land needs set out in the County LNA report and form the basis of a draft County Official Plan Amendment released on June 2, 2022.

A. NO CHANGE MADE TO POPULATION ALLOCATIONS

No change has been made to the population allocations set out in the County LNA report (see Table 1). The County's population is forecast to grow by 194,000, from 361,000 in 2021 to 555,000 in 2051. This represents a significant amount of growth over the next 30 years. Most growth will be generated by in-migration from the Greater Toronto Area.

- About 79% of all population growth is forecast to occur in the six municipalities with primary settlement areas identified in the Growth Plan (Bradford West Gwillimbury, Collingwood, Innisfil, Midland, New Tecumseth, and Penetanguishene).
- About 63% of all population growth is forecast to occur in the Southern Regional Market Area, mainly in Innisfil, New Tecumseth, and Bradford West Gwillimbury (with 20%, 18%, and 20% of total County growth respectively).
- Population growth in the Northern Regional Market Area is forecast to be concentrated in large, well-established urban centres such as Collingwood, Midland, Penetanguishene, and Wasaga Beach, as well as in municipalities that have advanced plans for development such as Springwater and Clearview.

Table 1 - Simcoe Population Allocations to Local Municipalities

Municipality	County LNA Report (March 2022)			Draft OPA (June 2022)			Difference
	2021	2051	2021-51	2021	2051	2021-51	2021-51
Adjala-Tosorontio	11,260	11,970	710	11,260	11,970	710	0
Bradford West Gwillimbury	44,490	83,470	38,980	44,490	83,470	38,980	0
Essa	23,810	34,740	10,930	23,810	34,740	10,930	0
Innisfil	44,710	84,450	39,740	44,710	84,450	39,740	0
New Tecumseth	45,480	80,590	35,110	45,480	80,590	35,110	0
Clearview	15,220	21,820	6,600	15,220	21,820	6,600	0
Collingwood	25,470	42,690	17,220	25,470	42,690	17,220	0
Midland	18,250	24,290	6,040	18,250	24,290	6,040	0
Oro-Medonte	23,770	26,230	2,460	23,770	26,230	2,460	0
Penetanguishene	10,340	14,390	4,050	10,340	14,390	4,050	0
Ramara	10,680	12,870	2,190	10,680	12,870	2,190	0
Severn	14,750	17,790	3,040	14,750	17,790	3,040	0
Springwater	22,320	32,490	10,170	22,320	32,490	10,170	0
Tay	11,410	13,130	1,720	11,410	13,130	1,720	0
Tiny	13,240	16,010	2,770	13,240	16,010	2,770	0
Wasaga Beach	25,480	38,090	12,610	25,480	38,090	12,610	0
Southern RMA	169,750	295,220	125,470	169,750	295,220	125,470	0
Northern RMA	190,930	259,800	68,870	190,930	259,800	68,870	0
Simcoe County	360,680	555,020	194,340	360,680	555,020	194,340	0

Source: Hemson Consulting

B. COMMUNITY AREA LNA ADJUSTED TO REFLECT LAND SUPPLY AND INTENSIFICATION/DENSITY TARGETS IN SOUTHERN RMA

The County LNA Report identified an additional Designated Greenfield Area (DGA) land need of 1,156.0 developable hectares to accommodate growth and meet housing market demand in the Southern Regional Market Area. This land need has been adjusted to reflect:

- Additional vacant land supply in the delineated built up area (BUA) and DGA of Bradford West Gwillimbury (equivalent to 400 units in the BUA and 830 units in the DGA). This has the effect of reducing the Community Area expansion required in Bradford West Gwillimbury by 53.5 developable hectares.
- The relatively limited capacity of the BUA in Innisfil to accommodate intensification, given that the BUA only covers the settlement areas of Alcona and Cookstown and excludes the settlement areas of Gilford, Stroud, Lefroy/Belle Ewart, and Sandy Cove. As such, the intensification target for Innisfil has been reduced from 33% to 30%. The overall County intensification target would be 35%, up from 32% in the current County Official Plan (see Table 2).

Table 2 - Simcoe Intensification Targets

Municipality	Intensification Targets			
	2016 County Official Plan	County LNA Report (March 2022)	Draft OPA (June 2022)	Difference (March to June 2022)
Adjala-Tosorontio	20%	0%	0%	0%
Bradford West Gwillimbury	40%	42%	42%	0%
Essa	20%	30%	30%	0%
Innisfil	33%	33%	30%	-3%
New Tecumseth	40%	37%	37%	0%
Clearview	20%	30%	30%	0%
Collingwood	40%	50%	50%	0%
Midland	40%	50%	50%	0%
Oro-Medonte	20%	0%	0%	0%
Penetanguishene	40%	50%	50%	0%
Ramara	20%	0%	0%	0%
Severn	20%	20%	20%	0%
Springwater	15%	15%	15%	0%
Tay	20%	20%	20%	0%
Tiny	20%	0%	0%	0%
Wasaga Beach	20%	50%	50%	0%
Southern RMA	n/a	36%	35%	-1%
Northern RMA	n/a	35%	35%	0%
Simcoe County	32%	36%	35%	-1%

- An assumed density of 55 residents and jobs per hectare in the Innisfil DGA, which is consistent with the density targets for Bradford West Gwillimbury and New Tecumseth. The effect of this change on the overall County LNA is minor: the DGA density targets for the Southern Regional Market Area, Northern Regional Market Area, and County as a whole would remain the same as established by the County LNA Report (see Table 3).

Table 3 - Simcoe DGA Density Targets

Municipality	DGA Density Targets (residents and jobs per ha)			
	2016 County Official Plan	County LNA Report (March 2022)	Draft OPA (June 2022)	Difference (March to June 2022)
Adjala-Tosorontio	32	n/a	n/a	n/a
Bradford West Gwillimbury	35	55	55	0
Essa	32	45	45	0
Innisfil	32	60	55	(5)
New Tecumseth	50	55	55	0
Clearview	32	45	45	0
Collingwood	50	55	55	0
Midland	50	55	55	0
Oro-Medonte	32	n/a	n/a	n/a
Penetanguishene	50	55	55	0
Ramara	32	n/a	n/a	n/a
Severn	32	45	45	0
Springwater	32	45	45	0
Tay	32	45	45	0
Tiny	32	n/a	n/a	n/a
Wasaga Beach	32	55	55	0
Southern RMA	n/a	54	54	0
Northern RMA	n/a	47	47	0
Simcoe County	39	51	51	0

Based on these changes, the adjusted DGA land need for the Southern Regional Market Area is 1,136.4 developable hectares, or 19.5 fewer hectares than established by the County LNA Report.

In order to address the revised additional Southern Regional Market Area land need of 1,136.4 developable hectares, new DGA will still be required in Innisfil (104.2 hectares), Bradford West Gwillimbury (449.1 hectares), Essa (134.8 hectares), and New Tecumseth (448.4 hectares) (see Table 4).

No Community Area land expansion is required in the Northern Regional Market Area, consistent with the County LNA Report.

Table 4 - Summary of Community Area Expansion Land Needs

Municipality	Community Area Expansion Land Needs (developable ha)		
	County LNA Report (March 2022)	Draft OPA (June 2022)	Difference
Adjala-Tosorontio	0.0	0.0	0.0
Bradford West Gwillimbury	502.6	449.1	(53.5)
Essa	134.8	134.8	0.0
Innisfil	70.2	104.2	34.0
New Tecumseth	448.4	448.4	0.0
Clearview	0.0	0.0	0.0
Collingwood	0.0	0.0	0.0
Midland	0.0	0.0	0.0
Oro-Medonte	0.0	0.0	0.0
Penetanguishene	0.0	0.0	0.0
Ramara	0.0	0.0	0.0
Severn	0.0	0.0	0.0
Springwater	0.0	0.0	0.0
Tay	0.0	0.0	0.0
Tiny	0.0	0.0	0.0
Wasaga Beach	0.0	0.0	0.0
Southern RMA	1,156.0	1,136.4	(19.5)
Northern RMA	0.0	0.0	0.0
County	1,156.0	1,136.4	(19.5)

Source: Hemson Consulting

C. REVISED EMPLOYMENT AREA LNA REFLECTS LAND SUPPLY ADJUSTMENTS AND HIGHER DEMAND IN BRADFORD WEST GWILLIMBURY

No material change has been made to the County employment forecast by type set out in the County LNA Report.¹ The County's employment base is forecast to grow by 81,000 jobs,

¹ In the Township of Tiny, 100 jobs that were categorized as Rural Employment in the County LNA Report have been re-categorized as Employment Land Employment to reflect employment growth occurring on designated employment lands around the Huronia Regional Airport in the Township Official Plan.

from 117,000 in 2021 to 198,000 in 2051. About 34,440 new jobs will require designated Employment Areas for their activities.

The allocation of employment to the local municipalities depends largely on the availability and suitability of the land supply for designated Employment Areas and on the population allocation set out in Table 1. Two broad changes to the employment allocations have been made: one to reflect the high demand for Employment Area in the Bradford West Gwillimbury Strategic Settlement Employment Area; another to reflect refinements to the land supply in select municipalities based on feedback from local planning staff.

i. Higher Demand for Employment Area in Bradford West Gwillimbury

The Bradford West Gwillimbury Strategic Settlement Employment Area is identified in the Growth Plan as an area to be planned and protected for employment uses that require large lots and depend upon efficient movement of goods and access to Highway 400. Part of the area—Area D, comprising approximately 160 developable hectares—was excluded from the Employment Area land supply in the County LNA Report as the permitted uses are currently limited to agricultural activities.

The revised Employment Area LNA assumes that Area D will be required to accommodate part of the County’s long-term employment growth to 2051. As well as being reserved for employment uses, these lands represent the logical extension of employment activities that are already developing rapidly along Highway 400 to the south on serviced lands. Moreover, allowing these lands to develop over the 30-year planning horizon is consistent with the County LNA Report which states:

“The Growth Plan identifies the Innisfil Heights Strategic Settlement Employment Area and the Bradford West Gwillimbury Strategic Settlement Employment Area as strategic sites for economic growth...These locations are planned for considerable economic growth over the coming decades, leveraging their site selection advantages which include access/adjacency to Highway 400, proximity to established industry, and good access to skilled labour. Accordingly, demand for employment lands is identified in the immediate/near term, as well as throughout the forecast horizon to 2051 as these employment areas mature.”²

² *County of Simcoe Employment Strategy – Real Estate Market and Site Selection Perspectives*, p.18 (in County LNA Report, Appendix B).

To facilitate growth in the Area D lands, some employment land employment has been reallocated from Oro-Medonte and Collingwood to Bradford West Gwillimbury (see Tables 5 and 6).

ii. Adjustments to Local Employment Area Supply

Based on discussions with local planning staff, minor adjustments to the land supply in select municipalities have been made to reflect constraints arising from infrastructure needs, landowner reluctance to develop, and vacant supply otherwise missed in County-wide land supply data. These adjustments include:

- Reducing the vacant land supply in the Lake Simcoe Regional Airport Economic Employment District in Oro-Medonte to reflect constraints posed by the airport runway and associated lands.
- Reducing the vacant land supply in Bradford West Gwillimbury to reflect lands required by Metrolinx for GO Transit station expansion in the settlement area of Bradford.
- Adjusting the vacant land supply in New Tecumseth: upwardly to account for additional vacant lands south and east of Alliston designated through OPA 29; and downwardly to account for lands in Alliston owned by Honda.
- Increasing the vacant land supply in Clearview and Essa to reflect current Official Plan land use designations.
- Reducing the land supply in Severn to reflect constrained lands along Highway 11.
- Adjusting the vacant land supply in Penetanguishene: upwardly to account for additional vacant lands in the eastern part of the Town; and downwardly to account for environmental and economic constraints (including landowner reluctance to develop) on select land parcels.

In addition, employment densities in some employment areas located in rural areas in Ramara, Oro-Medonte, and Essa have been adjusted downwards to reflect the anticipated economic activity associated with such areas.

These adjustments contribute to higher employment allocations for Essa, Clearview, and Penetanguishene, and lower employment allocations for Collingwood and Oro-Medonte (see Tables 5 and 6).

Table 5 - Simcoe Total Employment Allocations to Lower-Tiers (jobs)

Municipality	County LNA Report (March 2022)			Draft OPA (June 2022)			Difference
	2021	2051	2021-51	2021	2051	2021-51	2021-51
Adjala-Tosorontio	2,130	2,490	360	2,130	2,490	360	0
Bradford West Gwillimbury	11,810	28,310	16,500	11,810	30,900	19,090	2,590
Essa	9,630	13,090	3,460	9,630	13,350	3,720	260
Innisfil	9,980	30,270	20,290	9,980	30,270	20,290	0
New Tecumseth	20,750	31,620	10,870	20,740	31,610	10,870	0
Clearview	4,350	6,290	1,940	4,350	6,470	2,120	180
Collingwood	12,260	19,600	7,340	12,260	18,540	6,280	(1,060)
Midland	10,760	13,170	2,410	10,760	13,170	2,410	0
Oro-Medonte	5,900	11,410	5,510	5,900	9,310	3,410	(2,100)
Penetanguishene	4,830	5,970	1,140	4,830	6,100	1,270	130
Ramara	5,380	7,420	2,040	5,380	7,420	2,040	0
Severn	4,020	5,640	1,620	4,020	5,640	1,620	0
Springwater	6,700	9,190	2,490	6,700	9,190	2,490	0
Tay	1,570	2,610	1,040	1,570	2,610	1,040	0
Tiny	1,570	2,390	820	1,570	2,390	820	0
Wasaga Beach	4,960	8,510	3,550	4,960	8,510	3,550	0
Southern RMA	54,300	105,780	51,480	54,290	108,620	54,330	2,850
Northern RMA	62,300	92,200	29,900	62,300	89,350	27,050	(2,850)
Simcoe County	116,600	197,980	81,380	116,590	197,970	81,380	0

Source: Hemson Consulting

Table 6 - Simcoe Employment Land Employment Allocations to Lower-Tiers (jobs)

Municipality	County LNA Report (March 2022)			Draft OPA (June 2022)			Difference
	2021	2051	2021-51	2021	2051	2021-51	2021-51
Adjala-Tosorontio	60	170	110	60	170	110	0
Bradford West Gwillimbury	660	6,710	6,050	660	9,300	8,640	2,590
Essa	690	1,290	600	690	1,550	860	260
Innisfil	1,270	9,240	7,970	1,270	9,240	7,970	0
New Tecumseth	10,550	14,930	4,380	10,550	14,930	4,380	0
Clearview	390	1,190	800	390	1,370	980	180
Collingwood	3,910	8,210	4,300	3,910	7,150	3,240	(1,060)
Midland	3,520	4,760	1,240	3,520	4,760	1,240	0
Oro-Medonte	1,110	5,370	4,260	1,110	3,270	2,160	(2,100)
Penetanguishene	990	1,130	140	990	1,260	270	130
Ramara	330	1,300	970	330	1,300	970	0
Severn	240	1,310	1,070	240	1,310	1,070	0
Springwater	610	1,710	1,100	610	1,710	1,100	0
Tay	50	280	230	50	280	230	0
Tiny	30	30	0	30	130	100	100
Wasaga Beach	230	1,350	1,120	230	1,350	1,120	0
Southern RMA	13,230	32,340	19,110	13,230	35,190	21,960	2,850
Northern RMA	11,410	26,640	15,230	11,410	23,890	12,480	(2,750)
Simcoe County	24,640	58,980	34,340	24,640	59,080	34,440	100

Source: Hemson Consulting

iii. Employment Area Land Needs

The County LNA Report identified an additional Employment Area land need of 500.9 developable hectares on a County-wide basis to accommodate long-term employment land employment growth to 2051.

The adjusted Employment Area land need is for 278.0 developable hectares County-wide, or 222.9 fewer hectares than established by the County LNA Report. A significant part of the reduced land need is attributable to the treatment of the approximately 160 hectares of land in Area D in Bradford West Gwillimbury Strategic Settlement Employment Area as available supply.

Within each Regional Market Area:

- There is an additional Employment Area need of 75.2 hectares to accommodate employment land employment growth in the Southern Regional Market Area.
- There is an additional Employment Area need of 202.8 hectares to accommodate employment land employment growth in the Northern Regional Market Area.
- In order to address the additional Southern Regional Market Area land need of 75.2 hectares, new Employment Area will be required in New Tecumseth. The need for a minor expansion of Employment Area (7.5 hectares) in Adjala-Tosorontio has been removed as it is assumed that the Township will be able to accommodate its employment land employment growth on rural employment lands.
- In order to address the additional Northern Regional Market Area land need of 202.8 hectares, new Employment Area will be required in Collingwood (94.1 hectares), Severn (36.0 hectares), and Wasaga Beach (72.7 hectares). An expansion of Employment Area is no longer required in Clearview.

Table 7 sets out the revised Employment Area expansion land needs.

Table 7 - Summary of Employment Area Expansion Land Needs

Municipality	Employment Area Expansion Land Needs (developable ha)		
	County LNA Report (March 2022)	Draft OPA (June 2022)	Difference
Adjala-Tosorontio	7.2	0.0	(7.2)
Bradford West Gwillimbury	0.0	0.0	0.0
Essa	0.0	0.0	0.0
Innisfil	0.0	0.0	0.0
New Tecumseth	170.2	75.2	(95.0)
Clearview	38.7	0.0	(38.7)
Collingwood	210.8	94.1	(116.7)
Midland	0.0	0.0	0.0
Oro-Medonte	0.0	0.0	0.0
Penetanguishene	0.0	0.0	0.0
Ramara	0.0	0.0	0.0
Severn	0.0	36.0	36.0
Springwater	0.0	0.0	0.0
Tay	0.0	0.0	0.0
Tiny	0.0	0.0	0.0
Wasaga Beach	72.7	72.7	0.0
Southern RMA	177.4	75.2	(102.2)
Northern RMA	323.4	202.8	(120.6)
County	500.9	278.0	(222.9)

Source: Hemson Consulting

Note: Totals may not add up due to rounding.