



DEVELOPMENT SERVICES DEPARTMENT MEMORANDUM

TO: MAYOR J. LEHMAN AND MEMBERS OF COUNCIL

FROM: T. WIERZBA, PLANNER
K. SUGGITT, RPP, MANAGER OF STRATEGIC INITIATIVES, POLICY AND ANALYSIS

NOTED: M. BANFIELD, RPP, DIRECTOR OF DEVELOPMENT SERVICES
A. MILLER, RPP, GENERAL MANAGER OF INFRASTRUCTURE AND GROWTH MANAGEMENT
M. PROWSE, CHIEF ADMINISTRATIVE OFFICER

RE: UPDATE ON OFFICIAL PLAN PROJECT AND LAND NEEDS ASSESSMENT REPORT ADDENDUM

DATE: JUNE 15, 2020

OVERVIEW

The purpose of this Memorandum is to provide an update to members of Council on the status of the new Official Plan project. Further, this Memorandum provides an Addendum to the Draft Land Needs Assessment Report dated May, 2019 prepared by Watson and Associates Economists Ltd. as part of the Municipal Comprehensive Review process for the preparation of the new Official Plan.

BACKGROUND

As part of the Municipal Comprehensive Review (MCR) process to support the preparation of a new Official Plan, Council was provided with a Growth Management Options and Land Use Policy Directions report by way of City Building Committee on October 8, 2019. Council decided to take a balanced approach to growth with a 50% intensification target for accommodating new growth over the next 20 years. As part of that report, Development Services staff outlined the potential to consider employment area land conversions during the MCR process. Council supported that approach and staff have reported back to Council by way of a memo on May 25, 2020 on the analysis of those sites. The memo was deferred for further discussion at the Planning Committee on Monday June 1, 2020.

ADDENDUM TO THE LAND NEEDS ASSESSMENT REPORT

City Development Services staff have continued to work with Watson and Associates to determine the City's land needs following the conversion of employment area lands and the adoption of a 50% intensification target. The new land needs are prepared in the form of an Addendum to the Draft Land Needs Assessment Report. The Addendum, dated May 19, 2020, is attached as **Appendix "A"** to this memo.

Based on the preferred growth option and the recommended conversion of 43 hectares of currently designated employment area land to non-industrial uses, a proposed settlement area boundary expansion of 304 hectares of land in the secondary plan areas is required to accommodate future growth. Of the 304 hectares required, 170 hectares is needed for new employment area land to accommodate forecasted industrial job growth. 134 hectares is required to create new community area land which will accommodate population and non-industrial job growth to the year 2041.



DEVELOPMENT SERVICES DEPARTMENT MEMORANDUM

DRAFTING THE NEW OFFICIAL PLAN

The information provided in the above-noted Addendum Report is being used by City Development Services staff to assess the settlement area boundary expansion and proposed land uses to be reflected in the new Official Plan. Development Services staff have continued their work on the drafting of the new Official Plan and comprehensive City-Wide Urban Design Guidelines over the past few months, working closely with our planning consultants, Dillon Consulting, based on Council's support of the land use planning policy directions outlined in the October 8, 2019 report. A first full draft of the proposed new Official Plan and City-Wide Urban Design Guidelines is expected to be completed by the end of June and ready for public release and review at an appropriate point in time. Given the current State of Emergency declared by the City in response to the COVID-19 pandemic, and the limits placed on any in-person gatherings, it is anticipated that the public Open House and release of the draft documents will take place in September, if possible.

OTHER RELATED WORK

City Development Services staff are working with Infrastructure and Corporate Asset Management staff to assess the ability to provide servicing to the areas identified to accommodate the new growth over the planning horizon of the new Official Plan. As well, work is being coordinated with Finance staff to ensure an alignment with the Long-Range Financial Plan.

City Development Services staff and Communications staff have worked with a local video production company to begin preparing some informational videos about the new Official Plan based on themes explored during earlier public consultation. It is anticipated that the first video will be released in June with others being released during the summer leading up to the public release of the proposed new Official Plan.

Targeted stakeholder engagement is also anticipated to take place leading up to the release of the proposed new Official Plan. Once publicly released, there will be a minimum of 90 days provided for public, agency and Provincial Ministry review and commenting on the documents in accordance with the provisions under the *Planning Act*.

NEXT STEPS

The timeline of the new Official Plan has been impacted by the COVID-19 pandemic situation that limits gatherings and as such the release of the draft Official Plan will not take place in June 2020 as originally anticipated. As the situation improves, at an appropriate point in time, staff will prepare for an Open House and public release of the documents in September if possible.

APPENDIX 'A'

MCR – Long Term Urban Land Needs Study - Addendum Report



**Municipal Comprehensive Review (M.C.R.)
Long-Term Urban Land Needs Study**

City of Barrie

Addendum Report - Final

Watson & Associates Economists Ltd.
905-272-3600
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May 19, 2020



In association with: Dillon Consulting Limited
Tate Economic Research Inc.



1. Introduction

1.1 Overview of Changes to City of Barrie Growth Analysis and Long-Term Urban Land Needs Assessment (LNA)

The purpose of this Addendum Report is to summarize the updated urban land needs assessment (L.N.A.) and supporting background figures provided in the May 21, 2019 Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, hereafter referred to as the City of Barrie draft 2019 Urban Land Needs Study. The results of the May 2019 Draft M.C.R. are required to be updated in accordance with Official Plan (O.P.) Growth Scenario 2, which was endorsed by City Council in the fall of 2019 as the Preferred Long-Term Growth Scenario for the City. The Preferred Long-Term Growth Scenario is based upon a 50% annual housing intensification target i.e. total annual incremental housing development within the Built-Up Area (B.U.A) over the 2022 to 2041 plan horizon. The key growth targets endorsed by City of Barrie Council under the Preferred Long-Term Growth Scenario include the following:

- 50% annual housing intensification rate (share of annual City-wide housing growth over the 2022 to 2041 period) within the B.U.A.;
- An average density of 62 people and jobs per gross hectare measured across all designed greenfield area (D.G.A.) lands with the Community Area;
- An average density of 54 people and jobs per gross hectare measured on future designated D.G.A. lands.¹ These lands represent a portion of the area identified as Special Rural Area in O. P. Schedules 8E (Salem Secondary Plan) and 9E (Hewitt's Secondary Plan) which are planned to accommodate growth post-2031); and
- An average employment density of 35 jobs per gross within the City's Employment Areas.

¹ Due to a lower share of high-density units (apartments) and a greater share of ground-oriented housing (singles/semi-detached and townhouses), an average density of 54 people and jobs per gross hectares is assumed on future designated D.G.A. land. The forecast anticipates a large share of high-density units within the B.U.A. and D.G.A. lands surrounding the Barrie South GO Station.



This addendum also includes a review of the urban land need impact resulting from seven staff recommended Employment Area site conversions to Community Area. Based on the aforementioned, the City of Barrie L.N.A. has been revised based on the following:

- A 50% housing intensification target within the B.U.A. between 2022 and 2041; and
- The recommendation to convert approximately 43 hectares of Employment Areas to Community Areas.

This Addendum Report includes the following components:

- An impact assessment regarding the recommended Employment Area conversion sites on the City's L.N.A.;
- An impact assessment of the 50% annual housing intensification target on housing growth within B.U.A.;
- Updates to all supporting figures provided within the May 2019 M.C.R.;
- A summary of the City's revised Community Area and Employment Area L.N.A. by 2041; and
- A revised Appendix A growth forecast by Planning Policy Area.

As indicated in the City of Barrie draft 2019 Urban Land Needs Study, this component of the City's M.C.R. represents a critical background document to assist the City in the preparation of its new O.P. As part of this preparation, it is noted that the City continues to refine the technical background assumptions and ultimate boundary delineation related to its two Major Transit Station Areas (M.T.S.A.s), as set out in Chapter 4 of the City of Barrie draft 2019 Urban Land Needs Study.

1.2 Employment Land to Non-Employment Use (Community Area) Conversion Analysis

Overview

As summarized in Figure A-1, as part of the City's M.C.R. process, seven Employment Area sites have been recommended for conversion to non-employment uses, totalling 43 hectares (Column A). In summary, the conversion of the Employment Area sites



identified in Figure A-1 are anticipated reduce City's designated Employment Area land supply by approximately 53 gross hectares. Conversely, the recommended Employment Area conversion sites within the D.G.A., are anticipated to increase the City's designated Community Area land supply by approximately 27 gross hectares. This is discussed in further detail below.

Figure A-3 provides a map of the Employment Area conversion sites. The total land area of these sites has been identified at the property parcel level, excluding land area associated with environmental features as per Section 2.2.7.3. of the Growth Plan, 2019.¹ It is important to recognize that the subject Employment Area conversion sites include some additional non-developable land area "take outs" which are not considered in Section 2.2.7.3 of the Growth Plan, 2019. These additional "take outs" are largely associated with non-developable land area related to roads infrastructure (e.g. arterial roads, major collector roads, minor collector roads, as well as local roads in some cases where Employment Area sites have been subdivided).²

As summarized in Figure A-1, an upward land area adjustment of approximately 8 ha has been applied to the D.G.A Employment Area conversion sites when calculating the equivalent land area to be removed from D.G.A Community Areas.³ A more conservative upward land area adjustment has been applied when calculating equivalent Employment Area lands to be added to the City's employment land supply inventory as a result of the recommended Employment Area conversions. This more conservative adjustment recognizes that average parcel sizes within Employment Areas are typically larger than Community Areas, generally requiring less roads infrastructure.

¹ The approximate land area of environmental features have been measured by the City of Barrie based on GIS layers.

² The calculation of "gross" land area in accordance with Section 2.2.7.3 of the Growth Plan, 2019 excludes a) natural heritage features and areas, natural heritage systems and floodplains, provided development is prohibited in these areas; b) rights-of-ways for: electricity transmission lines, energy transmission pipelines; freeways, as defined by and mapped as part of the Ontario Road Network; and railways, as well as; c) cemeteries. It is noted that the land area associated with the subject Employment Area sites it not adjusted for items b and c, listed herein.

³ This adjustment factor has been based on a comparison by Watson & Associates Economists Ltd. of Community Area and Employment Area densities across the G.G.H on net developable lands versus gross lands as per Section 2.2.7.3. of the Growth Plan, 2019.



It is noted that only Employment Area conversion sites located within the City's D.G.A. lands are assumed to generate an equivalent reduction of post-2031 Community Area D.G.A. land need. Conversely, the conversion of Employment Areas within the B.U.A. is not anticipated reduce the need for Community Area D.G.A. lands. While it is recognized that the conversion of B.U.A Employment Areas would potentially add to the City's identified long-term housing intensification opportunities, it is also assumed that the City's total housing intensification potential is not forecast to increase beyond the 50% housing intensification target identified under the Preferred Growth Scenario. As such, recommended Employment Area conversion sites within the B.U.A. are not assumed to further reduce the City's anticipated long-term post-2031 urban land requirements in the Salem and Hewitt's Secondary Plan Areas.

**Figure A-1
City of Barrie
Potential Employment Area to Community Area Conversions¹**

Site #	Location	B.U.A./D.G.A.	Land Area (ha) Parcel ¹	D.G.A. Community Area Equivalent Growth Plan Gross (Ha) ²	Employment Area Growth Plan Gross (Ha) ³
			A	B	C
1	Huronial/Mapleview 5 - 434205000604700	D.G.A. - Employment Area	2	4	3
2	Huronial/Mapleview 1 - 434205000604800		6	9	8
3	780 Essa		0.5	0.8	0.7
4	Sadlon-Petromax		10	14	13
Total		D.G.A. - Employment Area	19	27	24
5	50 Wood St	B.U.A. - Employment Area	9	n/a	11
6	594-622 Essa		8	n/a	10
7	410 Bayview Dr/Park Place		6	n/a	8
Total		B.U.A. - Employment Area	23	n/a	29
Total			43	n/a	53

Source: Watson & Associates Economists Ltd. Note: Net land area data obtained from the City of Barrie.

¹Based on the measurement of the existing parcel area, excluding environmental features. These sites include some level of land assembly.

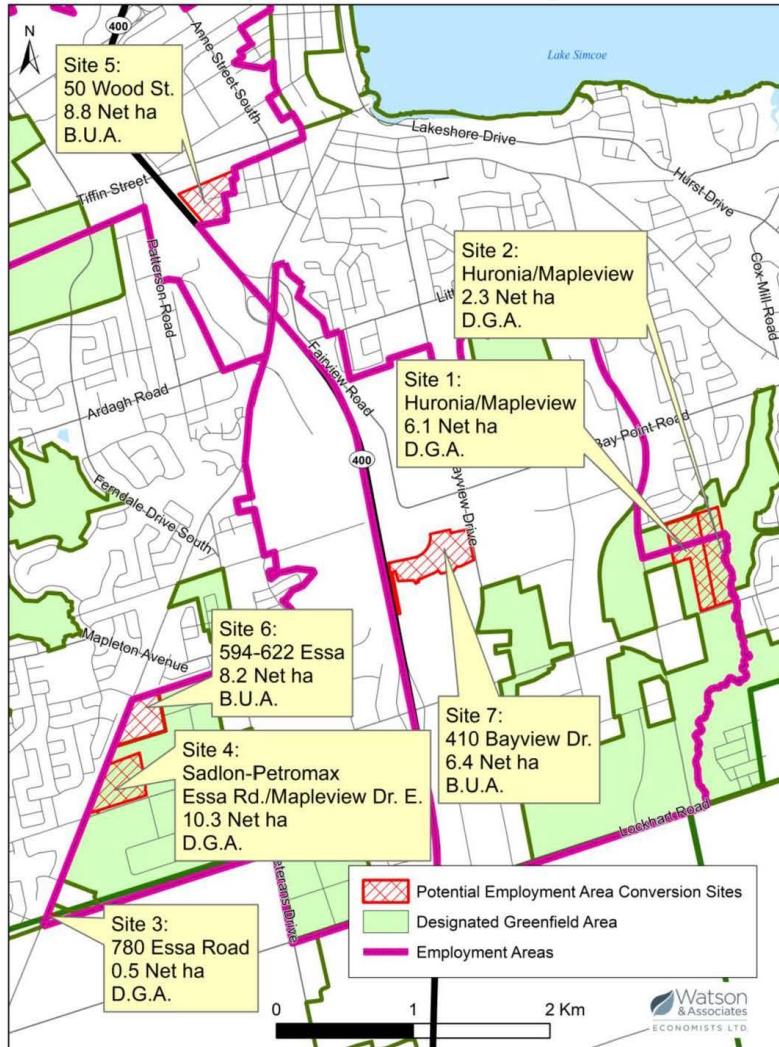
²Based on the parcel land area of conversion and estimate of land area for local infrastructure based on current land assembly. Parcels smaller than 3 ha: C = A x 1.57; and Parcels larger than 3 ha: C = A x 1.40.

³Based on the estimate gross area to accommodate the equivalent parcel within a new Employment Area setting. Parcels smaller than 3 ha: C = A x 1.33; and Parcels larger than 3 ha: C = A x 1.25.

¹ Excludes conversion sites already assessed in previous land needs assessment (City of Barrie M.C.R. Land Needs Assessment Report, May 21, 2019). Further, the following conversion site requests are excluded: sites that involve broadening permitted employment uses (i.e. population-related employment uses) and sites that involve broadening permitted uses within the B.U.A. to include residential, population-related employment/office and Employment Area uses.



Figure A-3
City of Barrie
Map of Potential Employment Area to Community Area Conversions



Source: Watson & Associates Economists Ltd. based on data obtained from the City of Barrie. Notes: Land area has been estimated by the City of Barrie based on the property parcel on designated Employment Areas (only the portion of the parcel on designated Employment Areas is measured) and excludes designated Natural Heritage System lands.



Impact of Recommended Employment Area Conversions on Community Area Land Needs, 2041

Figure A-4, summarizes the four recommended Employment Area conversion sites within the City’s D.G.A. As previously stated, the conversion of each of these Employment Area sites to Community Area is anticipated reduce the City’s Community Area land needs associated with the post-2031 lands in the Salem and Hewitt’s Secondary Plan Areas by approximately 27 gross ha.

It is important to recognize that the impact of these Employment Area sites has been assessed based on the average D.G.A. Community Area yield assumed on new D.G.A. Community Area lands. The average Community Area density for these sites is targeted at 54 people and jobs per gross ha, generating approximately 1,500 people and jobs. The share of high-density housing growth related to post-2031 D.G.A. Community Area lands is forecast to be relatively low by 2041, which contributes to the modest average greenfield density target for these lands at 54 people and jobs per ha. The housing unit mix associated with the post-2031 D.G.A Community Area lands is further discussed in Section 1.3. The rationale for the lower average density of the post-2031 D.G.A Community Area lands was also previously addressed on page 2 Section 1.1.

Figure A-4
City of Barrie
Potential Employment Area to Community Area Conversions
Community Area D.G.A. Impact

Location	Land Area (ha) Parcel	Associated Local Infrastructure Due to Land Subdivision (ha) Not Included in Parcel Land Area ¹	Estimated Growth Plan Gross Land Area	People and Jobs	Population	Employment	Housing Units	Low Density Units	Medium Density Units	High Density Units
	A	B	C = A + B	D = C x 54 p/j	E = 86% x D	F = 14% x D	G = E / P.P.U (2.47)	H = 24% x G	I = 26% x G	J = 50% x G
Huronian/Mapleview 5 - 434205000604700	2.3	1	4	191	164	27	66	16	17	34
Huronian/Mapleview 1 - 434205000604800	6.1	2	9	461	396	65	160	38	41	81
780 Essa	0.5	0.3	1	42	36	6	15	3	4	7
Sadlon-Petromax	10.3	4	14	779	670	109	271	64	70	137
Total	19.2	8	27	1,473	1,266	207	513	121	132	259

Source: Watson & Associates Economists Ltd. Note: Net land area data obtained from the City of Barrie.

¹Based on the parcel land area of conversion and estimate of land area for local infrastructure based on current land assembly. Parcels smaller than 3 ha: C = A x 1.57; and Parcels larger than 3 ha: C = A x 1.40.



Recommended Employment Area Conversion Impact on Employment Area Land Needs, 2041

As summarized in Figure A-5, the recommended Employment Area conversion sites reduces the City’s Employment Area land supply by approximately 53 gross hectares. As such, this reduction to the City’s designated Employment Area supply results in a need to expand the City’s designated post-2031 Employment Area land supply in the Salem and Hewitt’s Secondary Plan Areas by and additional 53 gross ha. Based on an average Employment Area density of 35 jobs/per gross hectare, these sites have the capacity to accommodate approximately 1,900 jobs.

Figure A-5
City of Barrie
Potential Employment Area to Community Area Conversions
Employment Area Impact

Site #	Location	B.U.A./D.G.A.	Land Area (ha) Parcel ¹	Associated Local Infrastructure Due to Land Subdivision (ha) Not Included in Parcel Land Area ²	Employment Area Growth Plan Gross (Ha) ³	Employment on Designated Employment Areas
			A	B ²	C = A + B	D = C x 35 Jobs/Ha
1	Huronian/Mapleview 5 - 434205000604700	D.G.A. - Employment Area	2.3	0.7	3.0	-100
2	Huronian/Mapleview 1 - 434205000604800		6.1	1.5	7.6	-270
3	780 Essa		0.5	0.2	0.7	-20
4	Sadlon-Petromax		10.3	2.6	12.9	-450
5	50 Wood St	B.U.A. - Employment Area	8.8	2.2	11.0	-390
6	594-622 Essa		8.2	2.1	10.3	-360
7	410 Bayview Dr/Park Place		6.4	1.6	8.0	-280
Total			43	11	53	-1,870

Source: Watson & Associates Economists Ltd. Note: Net land area data obtained from the City of Barrie.
¹Based on the measurement of the existing parcel area, excluding environmental features. These sites include some level of land assembly.
²Based on the parcel land area of conversion and estimate of land area for local infrastructure based on current land assembly. Parcels smaller than 3 ha: C = A x 1.33; and Parcels larger than 3 ha: C = A x 1.25.
³Based on the estimate gross area to accommodate the equivalent parcel within a new Employment Area setting.

1.3 Intensification Scenario: 50% Growth within B.U.A. and Impact of D.G.A Community Area Land Needs

As previously mentioned, under the Preferred Growth Scenario, the City’s L.N.A. has been revised based on a 50% housing intensification target. In order to achieve a 50% intensification rate, approximately 930 high density units were redistributed from the Hewitt and Salem Secondary Plan (specifically the post-2031 area) to the B.U.A.



Figure A-6 summarizes the revised housing forecast by policy area, B.U.A. and D.G.A.

Figure A-6
City of Barrie
Housing Forecast by Policy Area, 2021 to 2041¹

Period	Built Boundary	Designated Greenfield Area	Total Household Growth	Built Boundary Share (%)	Greenfield Share (%)
2022-2041	18,230	18,270	36,500	50%	50%

Source: Watson & Associates Economists Ltd. Note: May not add up precisely due to rounding.

It is important to note that the forecast increase in housing units to the B.U.A. is not anticipated to impact the City-Wide forecast by housing structure type (i.e. low, medium and high-density housing). However, this redistribution of housing does slightly impact both the amount and type of housing allocated between the B.U.A. and D.G.A.

As summarized in Figure A-7, in comparison to the 47% Intensification Scenario, as summarized in the Draft May 2019 City of Barrie M.C.R. L.N.A. Report, the 50% Housing Intensification Scenario (Preferred Growth Scenario) results in a slightly greater share of ground-oriented units (low and medium density) within the D.G.A. and conversely, a slightly smaller portion of high-density housing units within the D.G.A.

It is important to recognize that the both housing form and structure type can have an impact on average housing density. In the context of the May 2019 Draft Growth Scenario – 47% Housing Intensification and the April 2020 Preferred Growth Scenario – 50% Housing Intensification, this is can be accomplished by slightly increasing the average density (i.e. average number of housing units per hectare) within each housing structure type category (i.e. low-density, medium-density and high-density), resulting in a comparable overall density but a slight increase in the share of ground-oriented housing forms within the B.U.A.

¹ Note that the annual intensification target is measured over the 2022 to 2041 period. Forecast periods in this figure are based on 5-year census periods for planning purposes.



Figure A-7
City of Barrie
Comparison of Intensification Scenarios
Housing Mix by Policy Area (B.U.A. and D.G.A.), 2022 to 2041

Housing Type	47% Intensification Scenario: MCR Report, May 21, 2019		50% Intensification Scenario: Addendum Report, April 6, 2020		City-Wide Housing Distribution (%)
	B.U.A.	D.G.A.	B.U.A.	D.G.A.	
Low	2%	22%	2%	23%	13%
Medium	25%	24%	24%	25%	24%
High	73%	54%	74%	52%	63%
Total	100%	100%	100%	100%	100%

Source: Watson & Associates Economists Ltd. Note: May not add up precisely due to rounding.

As identified in the May 2019 Draft City of Barrie M.C.R., the City's housing strategy represents a transformative long-term vision. This vision recognizes that as the City continues to mature and urbanize over the long-term future needs will continue to evolve and diversify by built-form and density along with the City's diversifying population base. The May 2019 Draft City of Barrie M.C.R. further recognizes that the forecast mix of high-density housing growth does not represent a status quo scenario and will require the City to re-examine many of its existing housing and land-use policies as well as to explore new housing policies and planning/financial tools.

Given the significant shift in forecast housing growth by structure type projected in the May 2019 Draft City of Barrie M.C.R. relative to historical trends, it is recommended that the City-wide housing forecast by structure type under the Preferred Growth Scenario remain consistent with the draft study. As previously noted in Figure A-7, modest adjustments to the forecast housing mix by structure type between the B.U.A and D.G.A. have been made between the Draft and Final (Preferred) Growth Scenario.



1.4 Updated Figures from May 21, 2019 Draft City of Barrie M.C.R. Long-Term Urban Land Needs Study

The following figures have been updated based on the Preferred O.P. Growth Scenario (Scenario 2).

Figure A-8¹
City of Barrie
B.U.A. and Greenfield Area
Population Forecast to 2041

Period	Population (includes undercount) ¹		
	B.U.A.	Greenfield Area ²	Total Population
2021	139,300	28,300	167,600
2022	140,400	31,520	171,920
2031	156,000	54,000	210,000
2041	177,800	75,200	253,000
Growth Increment			
2021-2031	16,700	25,700	42,400
2031-2041	21,800	21,200	43,000
2022-2041	37,400	43,680	81,080
Share of Growth			
2021-2031	39%	61%	100%
2031-2041	51%	49%	100%
2022-2041	46%	54%	100%

Source: Watson & Associates Economists Ltd.

¹Based on undercount of approximately 3%.

Figures may not add up precisely due to rounding.

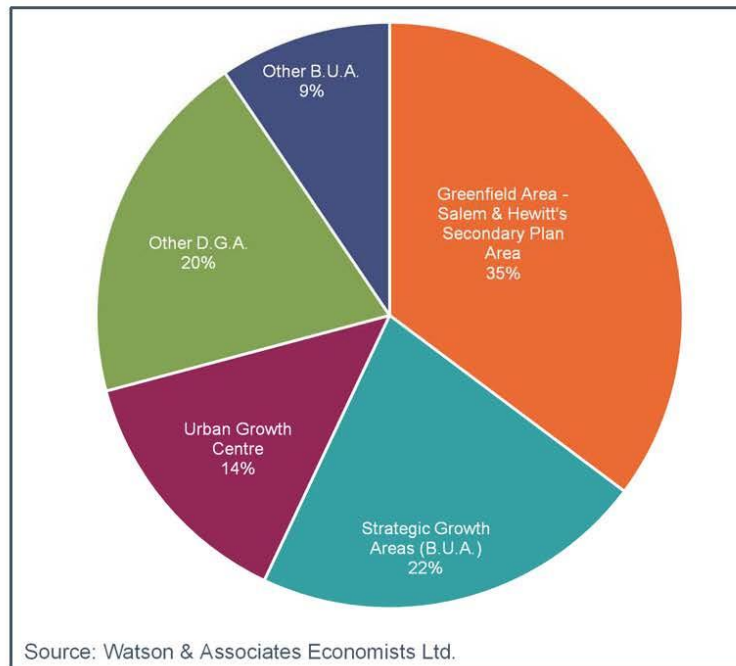
²Greenfield Area includes D.G.A. and undesignated D.G.A. (Special Rural Policy Area, Post-2031).

¹ Replaces Figure 3-28a in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.3-34.



Further details of the population forecast by Planning Policy Area are provided in Appendix A.

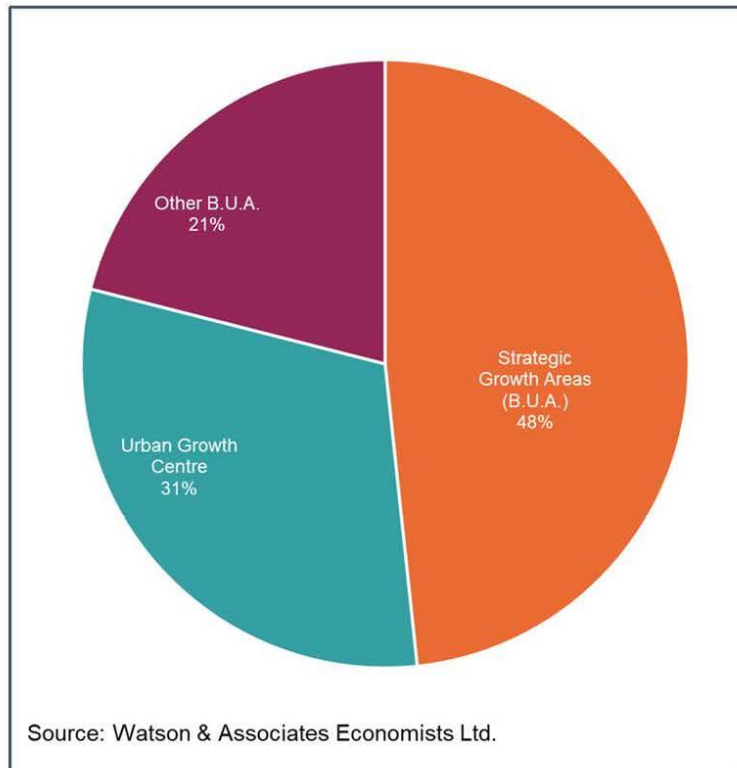
Figure A-9¹
City of Barrie
Population Growth Forecast by Area
2021 to 2041



¹ Replaces Figure 3-28b in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.3-35



Figure A-10¹
City of Barrie
Population Growth Forecast by Area within B.U.A.
2021 to 2041



¹ Replaces Figure 3-29 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.3-35.



Figure A-11¹
City of Barrie
Built Boundary and Greenfield Area
Housing Growth Forecast, 2021 to 2041

Period	Households		
	B.U.A.	D.G.A.	Total Households
2021	52,210	9,320	61,530
2022	52,870	10,590	63,460
2031	61,470	19,240	80,710
2041	71,100	28,860	99,960
Growth Increment			
2021-2031	9,260	9,920	19,180
2031-2041	9,630	9,620	19,250
2022-2041	18,230	18,270	36,500
Share of Growth			
2021-2031	48%	52%	100%
2031-2041	50%	50%	100%
2022-2041	50%	50%	100%

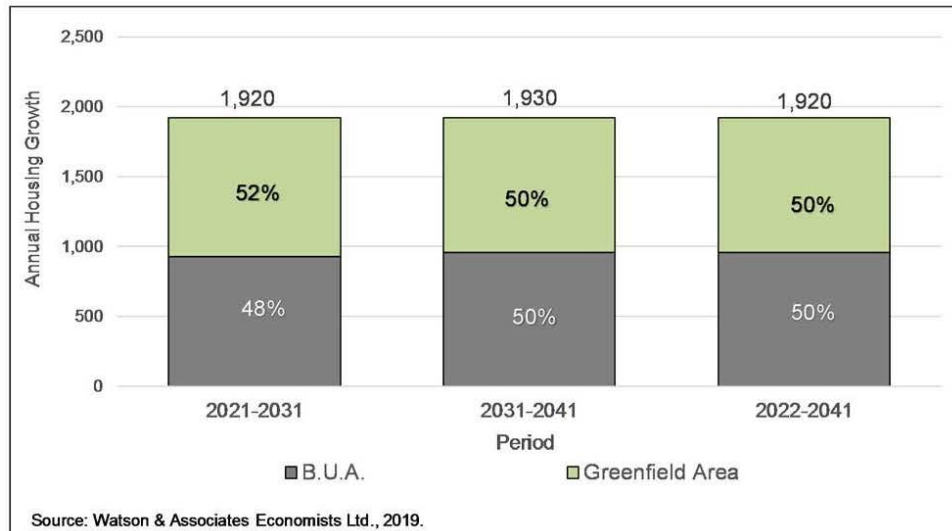
Source: Watson & Associates Economists Ltd.

Figures may not add up precisely due to rounding.

¹ Replaces Figure 3-32a in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.3-41.



Figure A-12¹
City of Barrie
Built Boundary and Greenfield Area
Annual Housing Forecast to 2041



¹ Replaces Figure 3-32b in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.3-42.



Figure A-13¹
City of Barrie
Growth Forecast by Planning Policy Area and Intensification Rate

Period	Population (includes undercount) ¹			Households		
	B.U.A.	Greenfield Area ²	Total Population	B.U.A.	Greenfield Area ²	Total Households
2021	139,300	28,300	167,600	52,210	9,320	61,530
2022	140,400	31,520	171,920	52,870	10,590	63,460
2031	156,000	54,000	210,000	61,470	19,240	80,710
2041	177,800	75,200	253,000	71,100	28,860	99,960
Growth Increment						
2021-2031	16,700	25,700	42,400	9,260	9,920	19,180
2031-2041	21,800	21,200	43,000	9,630	9,620	19,250
2022-2041	37,400	43,680	81,080	18,230	18,270	36,500
Share of Growth						
2021-2031	39%	61%	100%	48%	52%	100%
2031-2041	51%	49%	100%	50%	50%	100%
2022-2041	46%	54%	100%	50%	50%	100%

Source: Watson & Associates Economists Ltd.

¹Based on undercount of approximately 3%.

Figures may not add up precisely due to rounding.

²Greenfield Area includes D.G.A. and undesignated D.G.A. (Special Rural Policy Area, Post-2031).

¹ Replaces Figure 4-27 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.4-36.



Figure A-14¹
City of Barrie
Greenfield Development Forecast, 2021-2041

Geographic Area	2021-2041 Households	% Share
Salem & Hewitt's Secondary Plans	10,840	55%
Intensification Surrounding Barrie South GO Train Station ¹	4,650	24%
Other Greenfield Area	4,047	21%
Total D.G.A.	19,536	100%

Source: Watson & Associates Economists Ltd.

¹Based on intensification potential surrounding the GO Train Station, excluding planned/proposed residential developments within the Barrie South M.T.S.A. Note that the Barrie South M.T.S.A. in total is forecast to accommodate 10,600 units, approximately 39% of the Greenfield Area growth forecast. The Barrie South M.T.S.A. includes City Traffic Zones: 9, 12, 11, 204 and 205 as mapped in the City of Barrie Growth Scenarios Report, 2018.

¹ Replaces Figure 4-32 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p. 4-42.



Figure A-15¹
City of Barrie
Employment Land Need by 2041²

Establishment of Employment Area Need	
Total Employment Forecast - Employment in Employment Areas at 2041	44,780
Total Jobs in <u>Existing Designated</u> Employment Area at 2041, adjusted for conversions	38,830
Remaining Unallocated Employment Area Jobs at 2041	5,950
Target Density of Additional New Lands (employment density - jobs per ha)	35
Additional Employment Area Land Need (ha)	170

Source: Watson & Associates Economists Ltd.

¹ Replaces Figure 5-31 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.5-69.

² Employment land needs have been adjusted for potential conversions measuring approximately 53 gross ha. The reduction of the supply by 53 gross ha reduces the employment potential of approximately 1,900 (53 gross ha x 35 employees/ha = 1,900).



Figure A-16¹
City of Barrie
Employment Density Target – Existing and Additional Employment Lands

Employment Density Target - Existing & Additional Employment Lands	
A) Total Employment in Existing Employment Areas	38,830
B) Total Employment on Additional Lands	<u>5,950</u>
C) Total Employment Areas at 2041 $C = A + B$	44,780
D) Land Area in Existing Employment Areas at 2041	1,482
E) Land Area of Additional Lands	<u>170</u>
F) Total Land Area in Employment Areas at 2041 $F = D + E$	1,652
G) Employment Area Density Target $G = C / F$	27

Source: Watson & Associates Economists Ltd.

¹ Replaces Figure 5-33 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.5-71.



Figure A-17¹
City of Barrie
Designated Greenfield Area
Total Population and Households by 2041

Period	Designated Greenfield Areas	
	Total D.G.A. Population	Total D.G.A. Households
2021	28,300	9,320
2031	54,000	19,240
2041	75,200	28,860
Increment		
2021-2031	25,700	9,920
2031-2041	21,200	9,620

Source: Watson & Associates Economists Ltd.

¹Based on undercount of approximately 3%.

Figures may not add up precisely due to rounding.

Figure A-18²
City of Barrie
Designated Greenfield Area
Total Population and Community Area Employment by 2041

Total D.G.A. Population and Employment at 2041	
Population ¹	75,200
Community Area Employment ²	24,600
Total Population and Employment	99,800

¹Includes Census population undercount of 3%. As summarized in Figure 6-3.

²Includes usual place of work, no fixed place of work and work at home employment.

¹ Replaces Figure 6-3 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.6-4.

² Replaces Figure 6-4 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.6-5.



Figure A-19¹
City of Barrie
Designated Greenfield Area
Total Population and Community Area Employment by 2041

Population and Employment Planned for City's Existing D.G.A. at 2041 ¹	
Population ²	67,700
Community Area Employment ³	23,400
Total Population and Employment	91,100
Existing Gross Land Area (ha) ⁴	1,459
People and Jobs Density per gross ha	62

¹Based on community area lands currently designated in the City of Barrie's Official Plan.

²Includes Census population undercount of 3%.

³Includes usual place of work, no fixed place of work and work at home employment.

⁴In accordance with the Growth Plan, 2019.

¹ Replaces Figures 6-5, Ibid., p.6-6.



Figure A-20¹
City of Barrie
Designated Greenfield Area (Community Area)
Total Population and Households by 2041

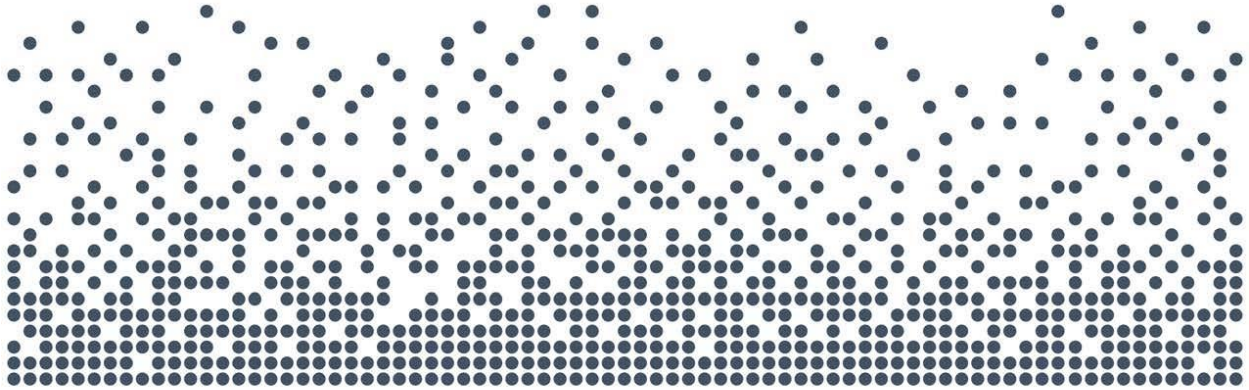
Total Greenfield Area Population and Employment	2041
Forecast Population and Employment at 2041 in D.G.A. and post-2031 lands	
Population	75,200
Employment	24,600
A) Total D.G.A. and Post-2031 Lands	99,800
Total Population and Employment to be Accommodated within Existing D.G.A.	
Population	67,700
Employment	23,400
B) Existing D.G.A.	91,100

Land Need	2041
C) Greenfield Area Forecast Not Accommodated on Existing D.G.A. Lands (C = A - B)	8,700
D) Minimum Density Target for New D.G.A. (per gross ha) ¹	54
E) Community Area Land Need (ha)	161
Less Employment Area Converted to Community Area	
E) Equivalent Community Area (gross ha)	27
F) Community Area Land Need (ha), Adjusted (F = E - F)	134

Source: Watson & Associates Economists Ltd.

¹Assumes a lower average density on new D.G.A. Community Area lands, lands to be brought into settlement area, due to a greater share of high density units on land within the existing settlement area. Average density of 54 people and jobs reflects primarily ground-oriented housing (singles/semi-detached and townhouses).

¹ Replaces Figure 6-6 in Draft City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, May 21, 2019, p.6-7.



Appendices



Appendix A

Population and Housing Forecast



Appendix A: Approach to Housing Forecast

As required by the G.G.H. L.N.A. Methodology, total housing growth is generated from forecast population by major age group using a headship rate forecast. A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e. cohort). Average headship rates do not tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e. 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as the City's population ages, the ratio of household maintainers is anticipated to increase. The average headship rate represents the inverse of the average number of persons per unit (P.P.U.). In general, as the City's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants increases.

It is noted that the population forecast provided herein includes an upward adjustment of approximately 3% for the Statistics Canada net Census Undercount. The net Census undercount represents the net number of persons missed during Census enumeration. It is further noted that the household formation forecast by age (i.e. headship rate analysis) and ultimately the total household forecast does not materially vary whether the net Census undercount data is included or excluded from the population.



Appendix A

Figure 1: Residential and Population Growth Forecast, Made in Barrie Scenario

Development Location	Forecast Period	Low-Density ¹	Medium-Density ²	High-Density ³	Total Households	Total Households (Rounded)	Population (Including Net Census Undercount) ⁴ (Rounded)
Urban Growth Centre	2021	384	249	2,710	3,343	3,340	5,800
	2026	433	310	4,036	4,779	4,780	8,300
	2031	433	401	6,848	7,682	7,680	13,400
	2036	433	401	8,260	9,094	9,090	15,800
	2041	433	401	9,320	10,154	10,150	17,600
Strategic Growth Areas within B.U.A. (excluding U.G.C.)	2021	750	817	1,952	3,519	3,520	7,500
	2026	750	1,178	2,735	4,664	4,660	9,800
	2031	750	1,934	3,769	6,453	6,450	13,500
	2036	750	2,864	4,665	8,279	8,280	17,600
	2041	750	4,431	7,170	12,350	12,350	26,100
Other B.U.A.	2021	31,073	7,928	6,346	45,346	45,350	126,000
	2026	31,179	8,126	7,006	46,311	46,310	126,700
	2031	31,285	8,544	7,510	47,339	47,340	129,100
	2036	31,367	8,544	7,973	47,883	47,880	132,100
	2041	31,471	8,544	8,586	48,601	48,600	134,100
Other D.G.A.	2021	2,069	857	819	3,744	3,740	11,100
	2026	2,240	1,456	2,239	5,935	5,940	15,600
	2031	2,294	1,508	2,479	6,281	6,280	16,300
	2036	2,631	1,650	5,553	9,834	9,830	23,300
	2041	2,708	1,650	8,083	12,441	12,440	27,900
D.G.A. - Salem & Hewitt's Secondary Plan Area	2021	3,459	1,429	686	5,574	5,570	17,200
	2026	5,351	2,907	1,214	9,472	9,470	28,800
	2031	6,146	4,453	2,357	12,956	12,960	37,700
	2036	6,679	5,131	2,769	14,579	14,580	42,100
	2041	7,453	5,684	3,277	16,414	16,410	47,300
City of Barrie	2021	37,735	11,279	12,513	61,527	61,530	167,600
	2026	39,953	13,977	17,231	71,161	71,160	189,200
	2031	40,908	16,840	22,963	80,711	80,710	210,000
	2036	41,859	18,591	29,219	89,669	89,670	231,000
	2041	42,815	20,710	36,436	99,960	99,960	253,000

Source: Based on the City of Barrie, Long-Term Growth Scenarios Review: Summary of Growth Forecast Assumptions, Methodology and Key Findings. Final Report, October 26, 2018. Population allocation to the D.G.A. and B.U.A. modified by Watson & Associates Economists Ltd., April 2020.

Note: Figures have been rounded and may not add up precisely.

1. Includes single and semi-detached.
2. Includes all townhomes and apartments in duplexes.
3. Includes low-rise and high-rise apartments.
4. Net Census population undercount estimated at approximately 3%.



Appendix A

Figure 2: Residential and Population Growth Increment Made in Barrie Scenario

Development Location	Forecast Period	Low-Density ¹	Medium-Density ²	High-Density ³	Total Households	Total Households (Rounded)	Population (Including Net Census Undercount) ⁴ (Rounded)
Urban Growth Centre	2021-2026	49	61	1,326	1,436	1,440	2,500
	2021-2031	49	153	4,137	4,339	4,340	7,600
	2021-2036	49	153	5,549	5,750	5,750	10,000
	2021-2041	49	153	6,610	6,811	6,810	11,800
Strategic Growth Areas within B.U.A. (excluding U.G.C.)	2021-2026	-	361	784	1,145	1,140	2,300
	2021-2031	-	1,117	1,818	2,934	2,930	6,000
	2021-2036	-	2,047	2,713	4,760	4,760	10,100
	2021-2041	-	3,613	5,218	8,831	8,830	18,600
Other B.U.A.	2021-2026	106	198	660	965	960	700
	2021-2031	212	617	1,164	1,992	1,990	3,100
	2021-2036	294	617	1,627	2,537	2,540	6,100
	2021-2041	398	617	2,240	3,255	3,250	8,100
Other D.G.A.	2021-2026	172	599	1,420	2,191	2,190	4,500
	2021-2031	225	651	1,660	2,537	2,540	5,200
	2021-2036	562	793	4,734	6,090	6,090	12,200
	2021-2041	639	793	7,264	8,697	8,700	16,800
D.G.A. - Salem & Hewitt's Secondary Plan Area	2021-2026	1,892	1,478	528	3,898	3,900	11,600
	2021-2031	2,687	3,024	1,671	7,382	7,380	20,500
	2021-2036	3,220	3,702	2,083	9,005	9,000	24,900
	2021-2041	3,994	4,255	2,591	10,840	10,840	30,100
City of Barrie	2021-2026	2,219	2,697	4,718	9,634	9,630	21,600
	2021-2031	3,173	5,561	10,449	19,184	19,180	42,400
	2021-2036	4,124	7,311	16,706	28,142	28,140	63,300
	2021-2041	5,080	9,430	23,923	38,433	38,430	85,400

Source: Based on the City of Barrie, Long-Term Growth Scenarios Review. Summary of Growth Forecast Assumptions, Methodology and Key Findings. Final Report, October 26, 2018. Population allocation to the D.G.A. and B.U.A. modified by Watson & Associates Economists Ltd., April 2020.

Note: Figures have been rounded and may not add up precisely.

1. Includes single and semi-detached.
2. Includes all townhomes and apartments in duplexes.
3. Includes low-rise and high-rise apartments.
4. Net Census population undercount estimated at approximately 3%.