



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

City of Barrie

Draft

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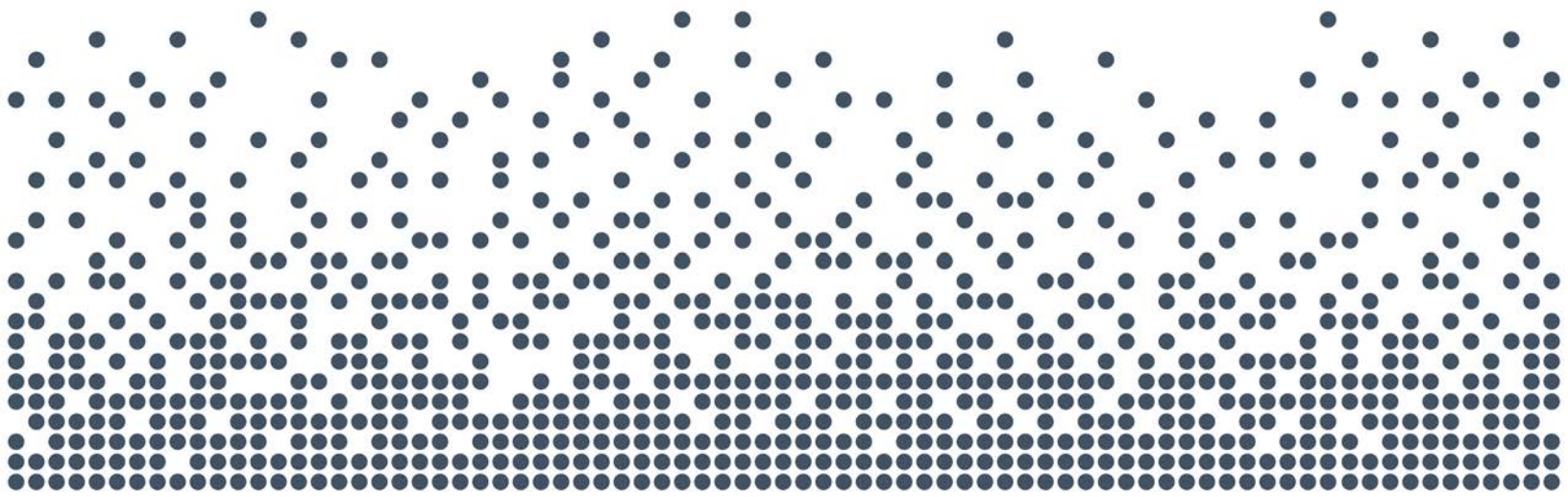
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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
B.U.A.	Built-up area
C.M.A.	Census metropolitan area
D.G.A.	Designated greenfield area
F.D.G.A.	Forecast designated greenfield area
G.A.F.O.	General Merchandise, Apparel, Furniture and Other Related
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.I.S.	Geographic information systems
G.M.S.	Growth Management Strategy
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.I.M.A.T.	Low-income measure, after tax
L.N.A.	Land Needs Assessment
M.C.R.	Municipal comprehensive review
M.T.S.A.	Major Transit Station Area
O.P.	Official Plan
O.P.A.	Official Plan Amendment
P.P.S.	Provincial Policy Statement
P.P.U.	persons per unit
P.S.E.Z.	Provincially Significant Employment Zone
U.G.C.	Urban Growth Centre



Executive Summary



Executive Summary

Introduction

The City of Barrie retained Dillon Consulting Ltd. (Dillon), in association with Watson & Associates Economists Ltd. (Watson) and Tate Economic Research Inc. (Tate), hereafter referred to as the Consultant Team in 2018, to prepare a new Official Plan (O.P.) for the municipality. This City's new O.P. is to reflect current provincial policy direction set out in the Growth Plan, 2019 and the 2014 Provincial Policy Statement (P.P.S.) as well as the City's strategic initiatives. The process of preparing the City's new O.P. represents a Municipal Comprehensive Review (M.C.R.), in accordance with section 26 of the Planning Act.¹

Within the framework of the Growth Plan, 2019, an M.C.R. is defined by the Ontario Ministry of Municipal Affairs and Housing (M.M.A.H.) as follows:

“A new official plan, or an official plan amendment, initiated by an upper- or single-tier municipality under section 26 of the Planning Act that comprehensively applies the policies and schedules of this Plan.”¹

The analysis provided herein represents a component of the City's M.C.R. process, as set out by provincial legislation, the requirements and methodologies of the Growth Plan, 2019, as well as supporting guidance documents.² This component of the M.C.R. includes the following key technical inputs:

- Housing Analysis;
- Residential Intensification Strategy;
- Employment Analysis;
- Designated Greenfield Area Density Analysis; and
- Community Land Needs Assessment.

¹ A Place to Grow, Growth Plan for the Greater Golden Horseshoe, 2019, p. 77.

² Draft Guidance to Support Implementation of the Growth Plan for the Greater Golden Horseshoe, 2017. The Municipal Comprehensive Review Process. Draft for Consultation March 2018. Ontario Ministry of Municipal Affairs. Draft Guidance to Support Implementation of the Growth Plan for the Greater Golden Horseshoe, 2017. Application of the Intensification and Density Targets. Draft for Consultation March 2018. Ontario Ministry of Municipal Affairs.



The above technical components collectively represent the background analysis which supports the City's long-term urban land needs assessment to the year 2041. A further discussion of the M.C.R. process and provincial guidance documents that support this process is provided herein under Chapter 2.

Background

The City of Barrie has recently updated its population and employment forecasts to 2041 by planning policy area and traffic zone. Under the 2018 City of Barrie Long-Term Growth Scenarios Review, three long-term population and employment forecasts were prepared, under the framework of the Growth Plan.¹ Growth Scenario 3 (Made in Barrie Long-Term Growth Scenario) reflects the City's preferred position with respect to long-term population, housing and employment growth potential, based on best efforts with respect to planning policy and growth accommodation.

Collectively, the City's long-term population and employment forecast (2018 Growth Scenarios Review Study) and this Long-Term Land Needs Analysis Study provide a number of technical components of the City's M.C.R. and Growth Plan conformity exercise. These studies establish a long-term vision for the City of Barrie which fosters a sustainable approach to future residential growth and economic development. Integral to this analysis for the City of Barrie is a comprehensive review of how growth in the built-up area (B.U.A.) and designated greenfield areas (D.G.A.) will be planned, phased and accommodated from a triple bottom-line perspective. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal financial impacts associated with new development. The results of the City's long-term urban land needs study are summarized below.

¹ Long-Term Growth Scenarios Review. City of Barrie. Summary of Growth Forecast Assumptions and Key Findings – Final Report. October 26, 2018. Watson & Associates Economists Ltd. Received by City of Barrie Council, February 2018.



Housing Analysis

In recent decades, the City of Barrie has represented one of the faster growing municipalities in Canada. Over the next 25 years this strong rate of residential growth is anticipated to continue. Between 2016 and 2041, Barrie's population base is forecast to increase by approximately 107,200 persons. To accommodate future population growth, the City is forecast to require approximately 47,500 new households between 2016 and 2041. As previously mentioned, the preferred population and housing forecast was developed based on the results of the 2018 City of Barrie Long-Term Growth Scenarios Review Study (Scenario 3 – Made in Barrie).

To accommodate this population forecast, a high rate of future housing development is anticipated within both the City's B.U.A. and its D.G.A. over the longer-term planning horizon. Collectively, the level of average annual housing growth projected across the City over the next 25 years is anticipated to be comparable to levels the City experienced during the 2001 to 2006 period; approximately 1,900 new households per year. The City's housing analysis, presented herein, represents a transformative long-term vision which recognizes that, as the City continues to mature and urbanize, future needs will continue to evolve and diversify by built-form and density along with the City's diversifying population base.

**Total Households
Required by 2041**

**To accommodate
future population
growth, the City of
Barrie is forecast to
require
approximately 47,500
new households
between 2016 and
2041.**

It is important to recognize that the forecast mix of high-density housing growth summarized in this report does not represent a status quo scenario. Achieving the targeted percentage of forecast high-density housing for the City of Barrie 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. The City will also need to consider policies that appropriately accommodate development between the B.U.A., the D.G.A. and future designated greenfield areas (F.D.G.A.) to ensure that greenfield development is phased in a manner that does not undermine the City's long-term housing intensification objectives.



Intensification Strategy

The City has significant opportunities to accommodate new housing within the B.U.A. (up to 43,000 housing units based on a high range scenario of intensification potential). While intensification opportunities represent a large portion of the total vacant housing supply within the City of Barrie, it is important to note that the majority (74%) of the intensification potential identified is comprised of high-density housing units (i.e. apartments). As summarized in Chapter 4, the City is forecast to achieve an intensification rate of 47% over the 2022 to 2041 forecast period within the B.U.A.. It is noted that this residential intensification target is close to the residential intensification target of 50% set out in the Growth Plan, 2019.

As the City's designated urban lands continue to mature and develop, a growing share of new residential and non-residential development is expected to occur within the City's intensification nodes, corridors and other redevelopment areas within the B.U.A., as directed by the City's O.P. policies. This shift in development patterns is anticipated to result in a steady increase in the share of high-density housing forms (i.e. low-, medium- and high-rise apartments) over the medium (2022 to 2031) and longer term (i.e. post-2031).

Accommodating a greater share of high-density development in the City of Barrie is fundamental to the objectives of this M.C.R. As the City of Barrie continues to mature, there will be a growing need to increase the utilization of available, designated urban lands to accommodate new development in more compact housing forms, particularly through high-density development. Population growth and increased urbanization of the City's B.U.A. are anticipated to bring new urban amenities and municipal services to the City (i.e. increased transit services, indoor recreation facilities, shopping, arts and cultural facilities, etc.) as well as local employment opportunities, which will benefit both the City and its local residents. Accordingly, provincial and local policies direct the City to accommodate an increasing share of its population base in high-density households. While this represents good planning policy, it is important to recognize that a large share of historical residential development within the City of Barrie has been ground-



oriented (refer to Figure ES-1 herein). To achieve the intensification targets set out herein, a greater proportion of the City's existing and future population will need to be accommodated in high-density households, including a greater proportion of adults between 30 and 54 years of age and their children. From a real-estate market perspective, the objective of accommodating a greater share of families in high-density households can be challenging, given the relatively higher price and carrying costs associated with larger apartments (i.e. apartments with greater than two bedrooms) compared to more compact ground-oriented housing forms with relatively comparable livable space (i.e. townhouses, stacked townhouses/back-to-back townhouses and other low-rise hybrid buildings). Furthermore, the feasibility of high-density housing forms across the City's existing neighbourhoods may need to be further examined against current zoning permissions for residential development. To facilitate a shift towards more compact high-density urban development, the City may need to consider the use of planning and/or financial tools, as well as other policies, that address the implementation of the City's long-term planning vision.

Policies and Tools will be Required to Support a Shift in Higher Density Housing

To facilitate a shift towards more compact high-density urban development, the City may need to consider the use of planning and/or financial tools, as well as other policies, that address the implementation of the City's long-term planning vision.

With respect to residential intensification, there are two unique local factors that may provide some challenges for the City to achieve a higher rate of residential intensification. These include:

- **Development of the Salem and Hewitt's Secondary Plan Areas** – impacts the percentage share of housing allocated to the B.U.A. within the City largely between 2016 and 2031, and to a lesser extent during the post-2031 period. The Salem and Hewitt's Secondary Plans are planned to collectively accommodate 40,600 persons by 2031. At buildout, it is estimated that the Salem and Hewitt's Secondary Plan Areas will accommodate approximately 50,700 persons. It is anticipated that as the Salem and Hewitt's Secondary Plan Areas develop, the City's rate of total annual housing growth will increase. As a result, this is likely to impact the percentage of residential development achieved within the B.U.A.



relative to total City-wide housing growth, particularly over the next 10 to 15 years.

- **Intensification of Lands Surrounding the Barrie South GO Train Station** – largely impacts the City’s residential intensification target during the post-2031 period. The Barrie South GO train station is located outside the City’s B.U.A. While housing growth within this area will be planned to largely accommodate high-density housing (i.e. low-rise, mid-rise and high-rise apartments), development immediately surrounding the Barrie South M.T.S.A is treated as greenfield development under the Growth Plan, 2019. This has the impact of further reducing the City’s percentage of housing growth allocated to the B.U.A.

Figure ES-1 summarizes the City’s greenfield housing forecast over the 2016 to 2041 period by geographic area under the Preferred Growth Scenario. In total, housing growth accommodated through intensification on the lands surrounding the Barrie South GO train station represents approximately 17% of forecast greenfield development (4,650 units) within the City between 2016 and 2041.¹

¹ It is important to note that this generally only includes growth to be accommodated within 500 metres of the Barrie South GO train station. The Barrie South M.T.S.A. includes a broader area (City Traffic Zones that are within 800 metres of the Barrie South GO train station), as delineated and summarized in Chapter 4. It is forecast that the Barrie South M.T.S.A. will accommodate approximately 39% of the D.G.A. housing growth forecast over the 2016 to 2041 period.



Figure ES-1
City of Barrie
Greenfield Development Forecast, 2016-2041

Geographic Area	2016-2041 Households	% Share
Salem & Hewitt's Secondary Plans	17,790	66%
Intensification Surrounding Barrie South GO Train Station ¹	4,650	17%
Other Greenfield Area	4,340	16%
Total D.G.A.	26,780	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.

Barrie's U.G.C. and Intensification Nodes and Corridors are expected to accommodate the vast majority of residential intensification over the forecast period. As illustrated in Figure ES-2, to achieve the 33% and 47% intensification identified herein over for the 2015 to 2021 and 2022 to 2041 periods, respectively, intensification within the U.G.C. and Intensification Nodes and Corridors will need to increase by more than eight-fold relative to historical development levels (i.e. 2011 to 2016).

Figure ES-2
City of Barrie
Annual Housing Intensification Forecast for U.G.C. and Intensification Nodes/Corridors

Residential Intensification Area	Historical Average, 2011-2016	Forecast Growth, 2016-2041	% Change - Historical vs. Forecast
U.G.C.	35	300	857%
Intensification Nodes/Corridors	40	338	845%

Source: Watson & Associates Economists Ltd.



As summarized in Figure ES-3, the City of Barrie is forecast to reach an intensification rate that is close to the intensification target identified in the Growth Plan, 2019.

Figure ES-3
City of Barrie
Housing Intensification Targets, 2015 to 2041

Period	Intensification Target		
	Preferred "Made in Barrie Scenario"	Growth Plan, 2006	Growth Plan, 2019
2015-2031	40%	40%	
2015-2021	33%		
2022-2031	45%		50% or Alternative
2031-2041	50%		
2022-2041	47%		

Source: Watson & Associates Economists Ltd.

Employment Analysis

With an estimated 2018 employment base of approximately 75,100, the City of Barrie has a diverse and growing economic base and serves as a regional centre to the surrounding municipalities within Simcoe County. Over the long term, the City is expected to accommodate balanced growth between residential and non-residential development and provide increasing local job opportunities for the residents of Barrie. By 2041, the City's employment base is forecast to reach approximately 129,000, in accordance with Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 53,900 jobs from 2018, or an annual employment growth rate of 2.4%. Over the 2018 to 2041 period, employment within Employment Areas is anticipated to account for 41% of total employment, while Community Areas are anticipated to account for the remaining 59% of total employment. Looking forward, the composition of both the City's Community Areas and Employment Areas is anticipated to evolve and change. A number of disruptive factors are impacting and altering the nature of economic activities and the built form of employment lands and community lands. These factors are summarized below.



Community Lands

Over the past decade, advancements in E-commerce, coupled with a shift in customer purchasing behaviours have changed the perception of what is required from a physical retail store. Retailers have responded to these changes by providing innovative retail concepts and flexibility in their retail platform (blending the physical store with E-commerce). From a real estate and land development perspective, the demand for commercial space has resulted in an increasing range of built-form and location options, diverging from the previous decade of developing primarily large-scale stores, big-box stores and power centres. Within the local context, the City of Barrie is starting to see mixed-used developments and a renewed interest in the downtown core, although retail development in Barrie has still been very active in the City's large commercial nodes. Population growth and increased density will continue to be a major focus in directing the City's commercial development within the City's U.G.C., M.T.S.A.s and other strategic growth areas. Further, population growth within these areas will also provide the opportunity to support the existing commercial base.

Employment Lands

Structural changes in the broader economy are altering the nature of economic activities and built form on employment lands and impacting their character. Over the past decade, the composition of industrial development in Ontario has evolved, with less emphasis on the manufacturing sector and more demand oriented to large-scale industrial buildings housing wholesale trade, distribution and logistics. Market demand on employment lands has also been increasingly driven by growth in the knowledge-based economy, including employment sectors such as professional, scientific and technical services; finance and insurance; real estate; and information and culture; health care; and education. With an increasing emphasis on these knowledge-based sectors, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming an increasingly dominant built form. There is also increasing demand to accommodate employment-supportive commercial and institutional uses on employment lands that offer amenities and services convenient to local businesses and their employees.

A major factor in the future competitiveness of the City's economic base is the quantity and quality of its vacant employment lands. As of January 2018, the City of Barrie had a total of 526 gross ha (1,300 gross acres) of vacant designated employment land,



including a net developable vacant employment land supply of 444 net ha (1,100 net acres). Based on a desktop review of lands with direct access to roads and servicing of water and wastewater, it is estimated that approximately 276 gross ha (682 net acres) are considered serviced, representing approximately 53% of the vacant land supply.

Given the large number of established industrial areas and business parks in Barrie, a wide array of opportunities exist to intensify the City's Employment Areas. Based on recent trends regarding employment land intensification and the likely intensification and redevelopment of existing Employment Areas, it is anticipated that approximately 8% of employment growth on employment lands over the 2018 to 2041 period will be accommodated through intensification in the City of Barrie. Adjusted for intensification, the City is anticipated to require 642 gross ha (1,590 gross acres) of vacant, developable D.G.A. to accommodate future employment growth on employment lands to the year 2041.¹ Based on this long-term assessment, the City does not have a sufficient supply of vacant designated lands to accommodate forecast demand through to 2041. As summarized in Figure ES-4, a D.G.A. shortfall of 116 gross ha (287 gross acres) is anticipated within the City's Employment Areas by 2041.

City of Barrie Long-Term Employment Land Needs

There is a shortfall of 116 gross ha (287 gross acres) to accommodate employment land growth by 2041.

¹ The existing vacant designated employment land supply is 526 gross ha (1,300 gross acres).



Figure ES-4
City of Barrie
Employment Land Need by 2041

Employment Land Need (Shortage)	
A) Total Employment Forecast - Employment in Employment Areas at 2041	44,780
B) Total Jobs in <u>Existing Designated</u> Employment Area at 2041	40,700
C) Remaining Unallocated Employment Area Jobs at 2041 (C = A-B)	4,080
D) Target Density of Additional New Lands (employment density - jobs per ha)	35
E) Additional Employment Area Land Need Need (ha) (E = C/D)	116

Source: Watson & Associates Economists Ltd.

Community Land Needs Assessment

Density is a key component in assessing D.G.A. land needs. Residential greenfield density within the City of Barrie over the 2006 to 2010 period averaged approximately 45 people and jobs per gross ha.¹ During the following five-year period, this average increased to 64 people and jobs per gross ha. Based on a review of the City's active development applications within Community Areas, it is anticipated that the City can continue to achieve an average residential density of approximately 62 people and jobs per gross ha over the forecast planning horizon, as summarized in Figure ES-5 under the Preferred Growth Scenario. The densities planned for Community Areas within the Salem and Hewitt's Secondary Plan Areas, as well as the potential high-density development opportunities

D.G.A. Community Lands Density Outlook

Looking forward, it is anticipated that average D.G.A. density levels in the City's Community Areas will continue to gradually increase and will exceed the Growth Plan, 2019 density target.

¹ Gross land area has been calculated in accordance to the Growth Plan, 2019.



identified around the Barrie South M.T.S.A., further support this assumption. Looking forward, it is anticipated that average D.G.A. density levels in the City's Community Areas will continue to gradually increase and will exceed the Growth Plan, 2019 density target of 50 people and jobs per gross ha. The forecast greenfield density target provided herein, is well above the density target established under the Growth Plan, 2019, as summarized in Figure ES-5.

Figure ES-5
City of Barrie
"Made in Barrie" Greenfield Density Target

Greenfield Density (People/jobs per gross ha) ¹			Opportunity/Challenge
Geographic Area	Preferred "Made in Barrie" Scenario	Growth Plan, 2019	
Designated Greenfield Area (D.G.A.)	62	50	City of Barrie is aiming to exceed the Growth Plan, 2019 target and also maximize the average greenfield area density target by allocating high-density growth around the Barrie South GO train station.
Future Designated Greenfield Area (F.D.G.A.) ²	60	50	Given the location attributes of the F.G.D.A. lands in the Salem and Hewitt's Secondary Plans, a slightly lower density is assumed; however it is still well above the Growth Plan, 2019 target.
Total Designated Greenfield Area	62	50	

Source: Watson & Associates Economists Ltd.

¹Reflects community lands only. Excludes employment lands.

²Reflects post-2031 lands in Salem and Hewitt's Secondary Plans.

In accordance with the greenfield density target, the City of Barrie's D.G.A. currently does not have the land capacity to accommodate the greenfield area 2041 population and employment forecast, based on a review of its current Community Area land supply,¹ and intensification targets.² As summarized in Figure ES-6, by 2041 an

¹ The City has a total designated community land supply (vacant and occupied) of 1,459 gross ha (3,605 gross acres).

² Based on 47% of housing growth within the B.U.A. over the 2022 to 2041 period.



additional 9,900 people and jobs are anticipated to be needed on Future Designated Greenfield Area (F.D.G.A.) lands within the City of Barrie (100,600 less 90,700). At an average density of 60 people and jobs per gross ha, there is a shortfall of 165 gross ha (408 gross acres) of community lands.

Figure ES-6
City of Barrie
Designated Greenfield Area (Community Areas)
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	76,000
Employment	24,600
A) Total D.G.A. and Post-2031 Lands	100,600
Total Population and Employment to be Accommodated within Existing D.G.A.	
Population	67,300
Employment	23,400
B) Total D.G.A.	90,700

Land Need	2041
Greenfield Area Forecast Not Accommodated on Existing D.G.A. Lands (A - B)	9,900
Minimum Density Target for New D.G.A. (post-2031 lands) (per gross ha)	60
Community Area Land Need (ha)	165

Source: Watson & Associates Economists Ltd.

Total Urban Land Shortfall by 2041

As previously summarized, the City of Barrie is anticipated to experience a total shortfall of 281 gross ha (694 gross acres) of urban lands over the 2041 forecast horizon. Currently, there are approximately 418 gross ha (1,033 gross acres) of lands designated Special Rural Area within the Salem and Hewitt's Secondary Plans available for potential future urban development subject to long-term need. A summary of forecast urban land needs compared to the gross developable land area designated as

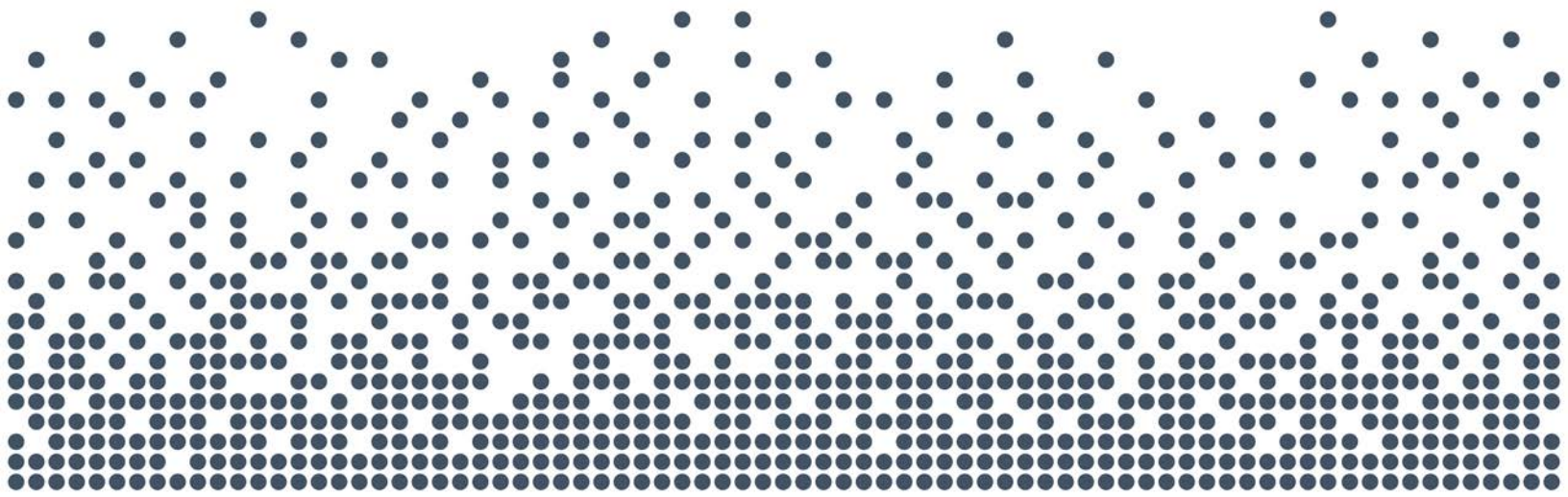


Special Rural Area within the City's Secondary Plan Areas is provided below in Figure ES-7.

Figure ES-7
City of Barrie
Identified Community Area and Employment Area Needs
Compared to Designated Rural Area in Salem and Hewitt's Secondary Plans

Land Type	Land Needs, Gross ha	Lands Identified as Designated Special Rural Area in Secondary Plans, Gross ha ¹
Community Area Land (ha)	165	145
Employment Land (ha)	116	273
Total Land (ha)	281	418

¹Based on adjusted Gross Land Area estimate in accordance with the Growth Plan. Environmental take-outs based on the City of Barrie Official Plan G.I.S. data. Other take-outs based on background work prepared by Macaulay Shiomi Howson Ltd., 2013.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

The City of Barrie retained Dillon Consulting Ltd. (Dillon), in association with Watson & Associates Economists Ltd. (Watson) and Tate Economic Research Inc. (Tate), hereafter referred to as the Consultant Team, to prepare a new Official Plan (O.P.) for the municipality to reflect current Provincial policy direction set out in the Growth Plan, 2019 and 2014 Provincial Policy Statement (P.P.S.) as well as the City's strategic initiatives. The process of preparing the City's new O.P. represents a Municipal Comprehensive Review (M.C.R.), in accordance with Section 26 of the Planning Act. The analysis provided herein represents a component of the City's M.C.R., as per provincial requirements and supporting guidance documents, and includes the following key technical inputs:

- Housing Analysis;
- Residential Intensification Strategy;
- Employment Analysis;
- Designated Greenfield Area Density Analysis; and
- Community Land Needs Assessment.

The above technical components collectively represent the background analysis which supports the City's long-term urban land needs assessment to the year 2041.

The City of Barrie has recently updated its population and employment forecasts to 2041 by planning policy area and traffic zone.¹ Under the 2018 City of Barrie Long-Term Growth Scenarios Review, three long-term population and employment forecasts were prepared, under the framework of the Growth Plan, 2019. Scenario 3 (Made in Barrie Long-Term Growth Scenario) reflects the City's preferred position with respect to long-term population, housing and employment growth potential based on best efforts with respect to planning policy and growth accommodation. Building on the recently completed growth forecast an M.C.R. is required to be completed to support the City's new O.P. and bring the local plan into conformity with the Growth Plan, 2019.

¹ Received by City of Barrie Council February 2019.



1.2 What is a Municipal Comprehensive Review?

A Municipal Comprehensive Review (M.C.R.) is used to establish a long-term vision and planning framework for a municipality that fosters a sustainable approach to future residential growth and economic development. Typically, an M.C.R. examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon. For municipalities located within the Greater Golden Horseshoe (G.G.H.), the long-term planning horizon is the year 2041.

The City's long-term population and employment forecast (2018 Growth Scenarios Review Study) and this Long-Term Urban Land Needs Analysis Study provide a number of technical components related to the City's M.C.R. process. This process is required support the City's new O.P. and bring the local plan into conformity with the Growth Plan, 2019. Integral to this analysis for the City of Barrie is a comprehensive review of how growth in the built-up area (B.U.A.) and designated greenfield areas (D.G.A.) will be planned, phased and accommodated. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development.

1.3 City of Barrie Growth Management Context

In many respects, Barrie's long-term population and economic growth potential is largely tied to the success of the Greater Golden Horseshoe (G.G.H.) as a whole. With a diverse and highly competitive economy, the G.G.H. represents the economic powerhouse in Ontario and the centre of a large portion of economic activity in Canada.

For both industries and residents, the City of Barrie has a strong appeal given its proximity and access to major regional infrastructure, distance to major employment markets, access to skilled labour and post-secondary institutions and a relatively cost-competitive development environment. These attributes have produced a steadily growing and diverse employment market in the City.

In addition to the above, the City of Barrie also has a strong reputation as a vibrant, growing, low-crime location in which to live and work. The City offers a wide range of top-rated public and private schools, a high standard of local infrastructure (i.e. roads, indoor/outdoor recreation facilities and social services, etc.), a vibrant downtown,



access to shopping, arts and culture and other recreational opportunities. These factors represent a key reason why the City of Barrie continues to remain attractive to new families and business development at the national and international level.

Given the desirable local and regional attributes of this area, the City of Barrie has experienced considerable population and employment growth over the past several decades. As set out in Schedule 3 of the Growth Plan, 2019, Barrie's population and employment base are forecast to reach 253,000 and 129,000, respectively, by 2041. This represents an increase of approximately 107,000 persons and 55,000 jobs, or an average annual population and employment growth rates of 2.2% and 2.3%, respectively, over the next 25 years.¹

Notwithstanding the economic growth experienced across the G.G.H., and more specifically the City of Barrie, domestic and international competition for business development and investment is increasing in today's "new economy." The City of Barrie is located within proximity to a number of large urban/suburban municipalities with which it competes directly for business attraction and investment. All of these municipalities generally offer regional attributes which appeal to prospective international and local firms.

As the City's population grows, providing affordable and appropriate housing for residents across all life stages will be an ongoing challenge. Between 2016 and 2041, a total of approximately 47,000 new households will be needed across the City within existing and future urban areas.¹ As the City of Barrie continues to mature, new housing development activity is anticipated to densify, with a greater share of new housing development occurring through more compact medium- and high-density housing forms. To accommodate future residents in the City of Barrie, there is also an increasing need to develop new and innovative approaches to housing development within areas that are pedestrian-oriented and transit-supportive. This includes options that provide greater opportunities for mixed-use development planned within intensification nodes and corridors, including secondary suites, live/work units and a range of affordable housing opportunities.

¹ City of Barrie Long-Term Growth Scenarios Review, Summary of Growth Forecast Assumptions and Methodology. Watson & Associates Economists Ltd. Final Draft. April 12, 2018. Received by City of Barrie Council, February 2019.



Looking forward, the continued urbanization of existing and planned greenfield areas across Barrie, combined with targeted intensification within the City's B.U.A., is anticipated to present a number of growth management opportunities and challenges for the City. Added to this, the increasing pace of technological change and advancement related to E-commerce, transportation technology (e.g. high-order transit, autonomous vehicles/trucking) and robotics/artificial intelligence, will continue to influence urban development patterns, infrastructure planning, and economic growth trends in established and emerging economic sectors. The key challenge and opportunity for the City of Barrie will be to accommodate growth and change in a manner that preserves the City's livability while embracing development patterns that are sustainable from a triple-bottom line perspective.



Chapter 2

Policy Context



2. Policy Context

This chapter provides an overview of the relevant provincial, regional and local policies that apply to long-term growth management in the City of Barrie. These policies provide the framework for the analysis and policy directions of this M.C.R.

2.1 Provincial Policy Context

The two key provincial policy documents that apply to long-term growth management are the Provincial Policy Statement, 2014 (P.P.S.), and A Place to Grow, Growth Plan for the Greater Golden Horseshoe (“Growth Plan”), 2019. The policies set out in these documents outline provincial land-use planning interests and provide high-level policy direction for municipalities.

2.1.1 Provincial Policy Statement

The P.P.S. provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and came into effect on April 30, 2014. All planning decisions “shall be consistent with” the P.P.S. (*Planning Act*, R.S.O. 1990, P. 13 s. 3). It should also be noted that s. 4.4 of the P.P.S. establishes that the P.P.S. is to be read in its entirety and all relevant policies are to be applied to each situation.

2.1.2 Growth Plan for the Greater Golden Horseshoe

The Growth Plan, which was created under the *Place to Grow Act, 2005*, was updated in May 2019. It sets out where and how growth will occur across the G.G.H. to 2041 and all planning decisions shall conform to it. The Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. Relevant aspects of the Growth Plan, 2019 for this study include the following:

Managing and Directing Growth

- Growth will be directed to settlement areas and within settlement areas it will be focused on strategic growth areas, locations where higher-order transit exists or is planned, and areas with existing or planned public services facilities;



- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential with convenient access to local stores, services and public service facilities;
- Municipalities should plan for a diverse range and mix of housing options, including second units and affordable housing, to accommodate people at all stages of life, and to accommodate the needs of all household sizes and incomes;
- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of mixed-use, transit-supportive, pedestrian-friendly urban environments;
- In general, the development of Employment Areas should be transit supportive and compact, and should minimize surface parking; and
- Municipalities should preserve lands within settlement areas in the vicinity of major highway interchanges, ports, rail yards and airports for manufacturing and associated retail, office and ancillary facilities where appropriate.

Minimum Intensification Targets¹

- New minimum intensification targets, the minimum percentage of all residential development occurring annually within the delineated B.U.A., have been created for upper-tier and single-tier municipalities in the G.G.H. There are two geographic groups for intensification targets. The City of Barrie is in the higher intensification target group, which is required by the time the next M.C.R. is approved and in effect, and for each year thereafter, to achieve a minimum of 50 per cent of all residential development occurring annually within the delineated B.U.A.²
- It is important to note that all upper-tier and single-tier municipalities have the ability to apply for alternative targets.

City of Barrie Minimum
Intensification Target,
Growth Plan, 2019

**50 per cent of all
residential development is
to be directed within the
City's delineated built-up
area.**

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.2.

² Refer to Figure 3-27 for a map of the City of Barrie built boundary (B.U.A.).



Minimum Greenfield Density Targets¹

- New minimum density targets have been created for the horizon of the Growth Plan, 2019 for G.G.H. upper-tier and single-tier municipalities and include two geographic groups. It is important to note that the greenfield density targets established in the Growth Plan, 2019 do not include employment lands.² The City of Barrie is in the higher density target group, which is required to plan for 50 people and jobs per gross ha by 2041, as summarized below:

City of Barrie Minimum Greenfield Density Target, Growth Plan, 2019

A minimum density target of 50 people and jobs per gross ha is required within the City's D.G.A., excluding employment lands by the year 2041.

- a) The Cities of Barrie, Brantford, Guelph, Hamilton, Orillia and Peterborough and the Regions of Durham, Halton, Niagara, Peel, Waterloo and York will plan to have a minimum designated greenfield area density target of 50 people and jobs per gross ha.³
 - b) The City of Kawartha Lakes and the Counties of Brant, Dufferin, Haldimand, Northumberland, Peterborough, Simcoe and Wellington will plan will have a minimum designated greenfield area density target of 40 people and jobs per gross ha.⁴
- All upper-tier and single-tier municipalities have the ability to apply for alternative targets.

Employment⁵

- According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within the settlement area. The density targets are to reflect the current and anticipated type and scale of employment that

¹ Ibid., section 2.2.4.

² As per the Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.7.

³ Ibid., section 2.2.7.

⁴ Ibid., section 2.2.7.

⁵ Ibid., section 2.2.4.



characterizes the Employment Area to which the target applies. Further, the minimum employment density target reflects opportunities for the intensification of Employment Areas on sites that support active transportation and are served by existing or planned transit.¹

**City of Barrie
Employment Area
Density Targets**

**The City is to
establish minimum
density targets for all
Employment Areas.**

- As part of the Growth Plan, 2019, the Province will allow for small employment land conversions (less than 40 ha/99 acres) in advance of an M.C.R., while ensuring protections are in place to safeguard key Employment Areas as needed.
- The conversion of employment lands to a designation that permits non-employment is allowed in advance of an M.C.R., provided that
 - there is a need;
 - the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
 - the municipality will maintain sufficient employment lands to accommodate forecast employment growth to the horizon of this Plan;
 - there are no adverse effects on the viability of an Employment Area or achievement of minimum intensification targets; and
 - there are existing or planned services in place.²
- The Province has identified key Employment Areas as Provincially Significant Employment Zones (P.S.E.Z.s) that are not to be converted regardless of land area size prior to the M.C.R. without a more comprehensive assessment approved by the Province. None of the Employment Areas within the City of Barrie has been identified by the Province as a P.S.E.Z.; however, it is important to note that the P.S.E.Z. can be reviewed by the Province at any time. Identified P.S.E.Z. are mapped through a web portal (i.e. there are no schedules in the Growth Plan, 2019).³

¹ Ibid., section 2.2.5.

² Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.5.

³ Provincially Significant Employment Zones Portal, <https://www.placestogrow.ca/AGOL/AccessibleViewer/?appid=9ea7adaecc7e4a54a8b5a9e61444e2c0>, accessed May 16, 2019.



Strategic Growth Areas – Urban Growth Centres (U.G.C.) and Major Transit Station Areas (M.T.S.A.s)¹

- U.G.C.s are recognized in the Growth Plan, 2019 as regional focal points for accommodating population and employment growth. It is noted that the U.G.C.s have the potential to become more vibrant, mixed-use, transit-supportive communities.² The City of Barrie has the only identified U .G.C. within the Simcoe Area. The minimum density target for the City of Barrie U.G.C. is 150 people and jobs per ha by 2031 or earlier.³ Chapter 4 provides further details regarding the U.G.C. density target for the City of Barrie.

Strategic Growth Areas Density Targets, Growth Plan, 2019

U.G.C. – 150 people and jobs/ha by 2031 or earlier.

M.T.S.A. – Not on priority transit line, municipality to consider local target.

- Minimum density targets are also set out in the Growth Plan, 2019 for transit corridors and station areas on priority transit corridors.⁴ While the City of Barrie has two station areas that are served by the GO Transit rail network, according to Schedule 5 of the Growth Plan, 2019, the two stations in Barrie are not on a priority transit corridor.⁵ Given that the City of Barrie is not a priority transit corridor, there is no minimum density target for the transit station areas in the City of Barrie. As such, the City of Barrie will need to consider a density target that is appropriate for these strategic growth areas based on the local context, including consideration of other strategic growth areas (e.g. U.G.C.) and the alignment of transit investment with growth. Chapter 4 provides a detailed discussion regarding intensification opportunities and forecast density within the City's Strategic Growth Areas.

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.

² Growth Plan for the Greater Golden Horseshoe, 2019, section 2.1.

³ Ibid., section 2.2.3. Other U.G.C.s with a density target of 150 people and jobs include: Downtown Brantford, Downtown Cambridge, Downtown Guelph, Downtown Peterborough and Downtown St. Catharines.

⁴ Ibid., section 2.2.3.

⁵ The priority transit corridor does not extend to the City of Barrie or to the rest of the Simcoe Area.



Settlement Area Boundary Adjustments and Expansions¹

- Municipalities are allowed to undertake settlement area boundary expansions that are no larger than 40 ha (approximately 99 acres) outside of the M.C.R. process, subject to criteria;
- Settlement area boundary adjustments are permitted outside of an M.C.R. provided that there is no net increase in land within settlement areas, subject to criteria;
- The requirement of the previous Growth Plan (Growth Plan, 2017) to de-designate excess lands when undertaking settlement area boundary expansions is not included in the Growth Plan, 2019; and
- The Growth Plan, 2019 places emphasis on a more outcome-focused approach to urban boundary expansions, rather than specifying types of studies required to justify the feasibility and location of expansions.

Population and Employment Forecasts²

- The Growth Plan, 2019 provides population and employment forecasts for upper-tier and single-tier municipalities which will apply throughout a municipal comprehensive review. Figure 2-1 summarizes the population and employment forecasts for the City of Barrie, the City of Orillia and Simcoe County. The City of Barrie had approximately 146,000 people³ and 59,000 jobs in 2016. As summarized below, the City of Barrie is forecast to reach a population of approximately 210,000 by 2031 and 253,000 by 2041, adding approximately 64,000 people and 107,000 people by 2031 and 2041, respectively. With respect to employment, by 2031, the City is forecast to reach 101,000 jobs and 129,000 jobs by 2041, adding approximately 42,000 jobs and 70,000 jobs by 2031 and 2041, respectively.

¹ Ibid., section 2.2.8.

² Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.

³ 2016 population and employment figures are rounded. 2016 population base includes a Census undercount adjustment of approximately 3%.



Figure 2-1
Growth Plan Population and Employment Projections

Growth Plan, 2019 Forecast*						
City of Barrie	Population			Employment		
	2031	2036	2041	2031	2036	2041
	210	231	253	101	114	129
City of Orillia	Population			Employment		
	41	44	46	21	22	23
Total Simcoe Sub Area	Population			Employment		
	667	731	796	254	277	304

*Figures shown represent thousands (i.e. 000s).

2.1.3 Land Needs Assessment Methodology

On May 4, 2018 the M.M.A.H. released the final methodology for land needs assessment in the G.G.H. in accordance with the Growth Plan, 2019. Upper- and single-tier municipalities in the G.G.H. are required to use this methodology to assess the quantity of land required to accommodate forecast growth in conformity with the policies in the Growth Plan, 2019.

The Land Needs Assessment Methodology for the G.G.H. (L.N.A. Methodology) identifies that the results of a land needs assessment can only be implemented through an M.C.R. As previously, noted, an M.C.R. is a new O.P. or an Official Plan Amendment (O.P.A.) initiated by an upper- or single-tier municipality under section 26 of the Planning Act that comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. Methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

“Community Areas: Areas where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment land employment jobs. Community areas include *delineated built-up*



areas [B.U.A.] and the *designated greenfield area* [D.G.A.] (excluding *employment areas*).

“Employment Areas: Areas where most of the employment land employment (employment in industrial-type buildings) jobs are, as well as some office jobs and some population-related jobs, particularly those providing services to the *employment area*. *Employment areas* (including *prime employment areas*) may be located in both *delineated built-up areas* [D.G.A.] and the *designated greenfield area* [D.G.A.]”¹

In total, the L.N.A. Methodology provides six key respective steps to establishing Community Area and Employment Area land needs.

2.1.4 Draft Guidance Documents

In March 2018, M.M.A.H. released two draft guidance documents for public consultation to support implementation of the Growth Plan, 2017 for the G.G.H. This included a document titled “The Municipal Comprehensive Review Process,” as well as a second document titled “Application of the Intensification and Density Targets.”

These draft guidance documents have been prepared by the Province to assist municipal planning practitioners, municipal councils, members of the public, stakeholders, First Nations and Metis communities and other decision-makers with a better understanding the policies of the Growth Plan, 2017. Each draft guidance document respectively addresses the technical criteria and approaches related to the implementation of the M.C.R. process and application of the intensification and density targets.^{2,3}

2.2 City of Barrie Official Plan

The City adopted a new O.P. in June 2009 in conformity with the most current provincial policy framework of the 2006 Growth Plan. The O.P. was approved by the M.M.A.H. on April 23, 2010 with modifications. Amendments approved current to January 2018, including O.P.A. 38, 39 and 40, and resultant Ontario Municipal Board (O.M.B.)

¹ Lands Needs Methodology for the Greater Golden Horseshoe, May 2018, p.14.

² Draft Guidance to Support Implementation of the Growth Plan for the Greater Golden Horseshoe, 2019. The Municipal Comprehensive Review Process. Draft for Consultation March 2018. Ontario Ministry of Municipal Affairs.

³ Ibid.



decisions pertaining to the Salem and Hewitt's Secondary Plans, have been included in the schedules and text of the O.P.

The City of Barrie has been recognized by the Province as “the anchor node for the Simcoe Area which will continue to function as the primary location for new population and employment growth and regional services.” To support this role, the Province, while directing that a significant portion of the new development be focused in Downtown Barrie (U.G.C.) and other nodes and corridors, also recognized the need for additional “greenfield” development primarily within the Salem and Hewitt's Secondary Plan Areas. Through a new O.P., the City has established a general framework for this new development. The analysis provided herein represents a component of the City's M.C.R. process and more specifically provides the technical analysis to support the assessment of the City's future urban land needs within the current provincial policy framework set out above in section 2.1.



Chapter 3

Housing Analysis



3. Housing Analysis

3.1 Introduction

This chapter provides a review of recent residential real estate, demographic and socio-economic trends within the City of Barrie and the surrounding market area based on recent Statistics Canada data and other available information sources.¹ This review has been prepared to provide insight with respect to the City's long-term housing needs in accordance with long-term population growth anticipated for the City to the year 2041. Key components of this chapter include:

- A review of housing development trends by housing type and location within the City of Barrie;
- A discussion of housing affordability trends in the City of Barrie within a provincial and regional context;
- A review of the range and supply of housing options within the City of Barrie and the potential to accommodate people at all stages of life, and to accommodate the needs of all household sizes and incomes;
- A summary of the City's long-term population housing forecast by structure type, including a breakdown of housing and associated population growth by planning policy area.

3.2 City of Barrie Official Plan Residential Density Policies

The City of Barrie O.P. identifies three housing density types with specific policies regarding built-form and land area density (housing units/ha). The following provides a brief overview of the housing density types discussed in the O.P.

- **Low-density** residential development shall consist of single detached, duplexes, or semi-detached dwellings with frontage on a public street. Average densities in low-density residential development shall range between 12 and 25 units per net residential hectare unless otherwise specified in the City of Barrie Official Plan.

¹ It is noted that the historical time period investigated varies throughout this chapter, subject to data availability.



- **Medium-density** residential development shall consist of multiple dwelling types such as triplexes, fourplexes, apartments, and street, stacked and cluster townhouses. Density requirements vary occurring to built-form and range from 26 units per ha to 35 units per ha.
- **High-density** residential development shall consist of developments that are in excess of 54 units per net hectare.¹

It is important to note that the housing density types identified in the City's O.P. differ slightly with the housing density types identified in the housing analysis of this report. The housing analysis, provided herein, utilizes Statistics Canada Census housing data which is categorized by the following structure types: single detached, semi-detached, townhouse, duplex and apartment. These housing categories are then grouped by density type by the Consultant Team. Below is a summary of the housing structure types by density grouping. These density groupings are then compared with the City's O.P. definitions.

- **Low-density** residential development includes single detached and semi-detached housing. These are housing units with no units below or above.
 - The City's O.P. definition of low-density housing includes the housing types mentioned above, as well as, duplexes.
- **Medium-density** residential development includes ground-oriented townhouse units, also referred to as rows² and apartments in duplexes (one of two dwellings, located one above the other).³
 - The City's O.P. definition for medium-density housing includes the above with the exception of duplexes, and also includes apartments based on a density threshold.
- **High-density** residential development includes low-rise and high-rise apartment buildings.⁴ These are units that are below and/or above a unit. It is important to note that a secondary suite added to a single detached, semi-detached or townhouse housing unit is considered high density, reflecting the average occupancy of these units.

¹ City of Barrie, Official Plan, section 4.0.

² Definition of row based on Statistics Canada definition. Includes back-to-back townhomes, but no units below or above.

³ Definition of duplex based on Statistics Canada definition.

⁴ Also includes stacked townhomes.



- As previously mentioned, the City's O.P. definition of high-density housing development is generally based on a density threshold.

3.3 Population and Housing Forecast Approach

As previously discussed in Chapter 2, the population and household growth forecast provided herein has been developed in accordance with the provincial L.N.A. Methodology for the G.G.H. Steps R1 and R2 of the provincial methodology more specifically set out the requirements in developing an age-specific population and household forecast using what is commonly referred to as the cohort-survival population forecast methodology.

The cohort-survival population forecast methodology uses, as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality, less out-migration, by age group). Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy.

Generally, households occupied by persons between the age of 30 and 64 have a higher average persons per unit (P.P.U.) compared to households occupied by younger and older adults (19 to 29 and 65+ age groups). This is important because, as the City's population ages over the forecast planning horizon, the City's average P.P.U. is anticipated to decline. This relationship between population age and average housing occupancy (P.P.U.) is further discussed in Appendix A.

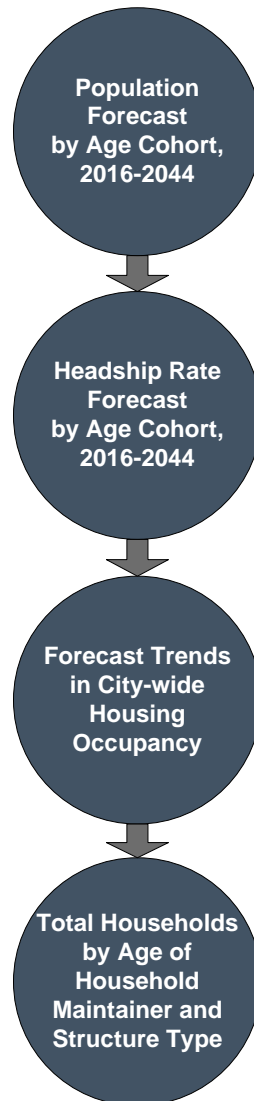
Figure 3-1 summarizes the population and housing forecast methodology.¹ As previously discussed, the 2018 City of Barrie Long-Term Growth Scenarios Review provides supplementary information with respect to the technical approach and results

¹ Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.



of the City's population, household and employment forecast and allocations from 2016 to 2041.¹

Figure 3-1
Cohort-Survival Population and Household Forecast Methodology



¹ City of Barrie. Long-Term Growth Scenarios Review. Summary of Growth Forecast Assumptions, Methodology and Key Findings. Final Report. October 26, 2018. Watson & Associates Economists Ltd.



3.4 City of Barrie Housing Market Trends Overview

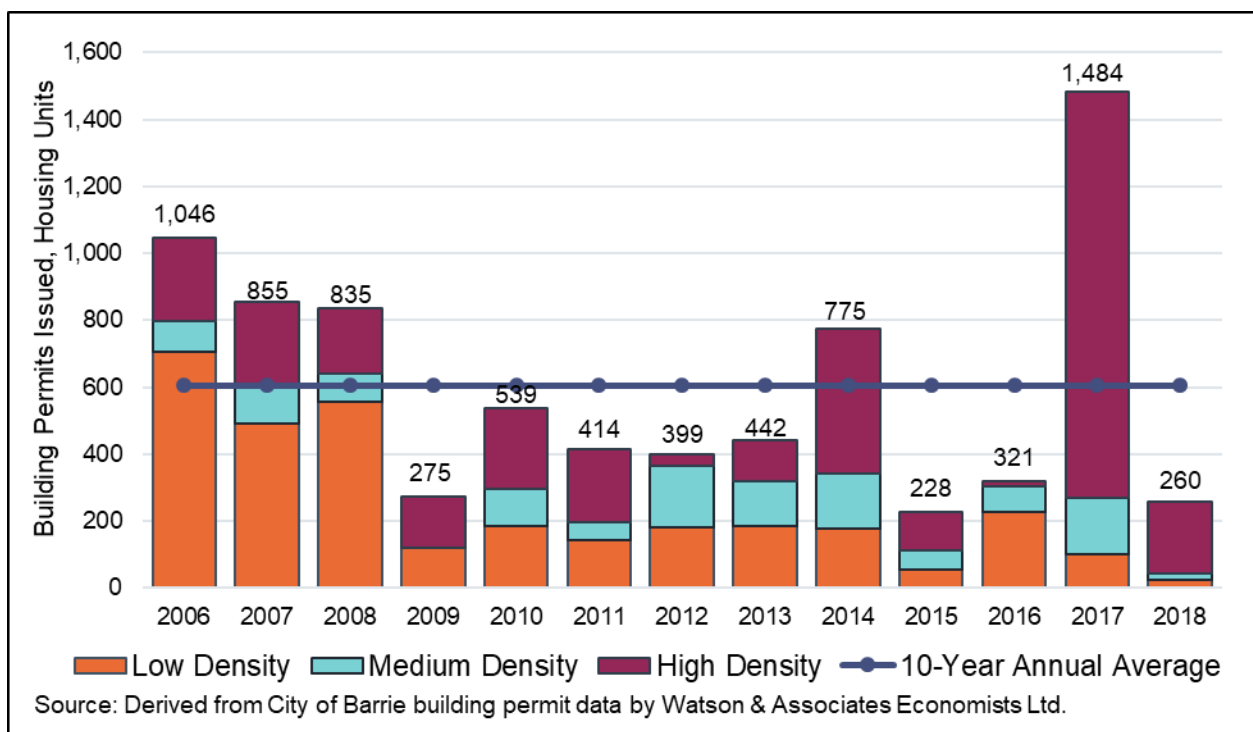
The following section provides a summary of recent residential real estate trends in the City of Barrie. This analysis has been prepared to provide insight regarding housing demand by structure type and development location.

3.4.1 Recent Building Permit Trends by Structure Type and by Planning Area

As summarized in Figure 3-2, the City of Barrie has issued 606 residential building permits annually since 2006. Over the 2006 to 2018 period, the following housing mix has been observed in the City of Barrie:

- Low Density: 40%
- Medium Density: 16%
- High Density: 44%

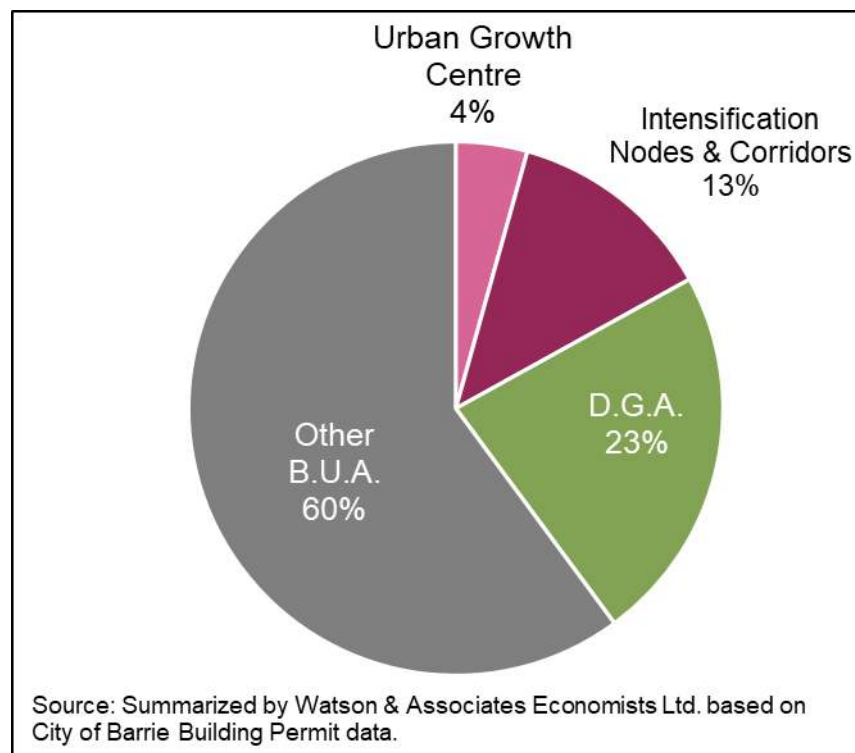
Figure 3-2
City of Barrie
Historical Building Permit by Structure Type, 2006 to 2018





As summarized in Figure 3-3a, almost one-quarter (23%) of residential building permits issued for new housing units issued in the City of Barrie were for development within the City's greenfield area. The Salem and Hewitt's Secondary Plan Areas accounted for approximately 7% of the greenfield development. Over the 2011 to 2018 period, 77% of the City's housing development occurred within the B.U.A. It is important to note that the anticipated increase in development within the Salem and Hewitt's Secondary Plan Areas will have a downward impact on the percentage share of residential growth over the next several years within the B.U.A. A review of intensification targets is discussed in Chapter 4 of this report.

Figure 3-3a
City of Barrie
Historical Building Permit by Structure Planning Policy Area, 2011 to 2018



Over the 2011 to 2018 period, the City averaged 540 dwelling units annually, as summarized in Figure 3b. Over that period, the B.U.A. averaged 417 dwelling units annually while the City's designated greenfield area (D.G.A.) averaged 124 dwelling units annually.



Figure 3-3b
City of Barrie
Historical Building Permit by Structure Planning Policy Area, 2011 to 2018

Location	Annual Units	% of City Units
Urban Growth Centre	23	4%
Intensification Nodes & Corridors	68	13%
Other B.U.A.	325	60%
Total B.U.A.	417	77%
D.G.A.	124	23%
City Annual Average, 2011 to 2018	540	100%

Source: Watson & Associates Economists Ltd.

The following sections provide a review of recent real estate market trends within the City's ownership and rental housing base. This includes an assessment of recent housing market trends relative to the broader market area and the Province as a whole.

3.4.2 Overview of Housing Ownership Trends

3.4.2.1 Trends in Resale Housing Prices, 2005 to 2019

As of January 2019, the average housing price in Barrie (based on MLS sales) was approximately \$458,600, which represents an annual increase of 5.2% over the past 15 years. Figure 3-4 summarizes the M.L.S. (Multiple Listing Service) Housing Price Index for resale homes between 2005 and 2018 for the Barrie Area (similar to the Barrie C.M.A.)¹ by housing type (the index base year is 2005).

The M.L.S. Housing Price Index is considered a reliable measure of housing price trends and compares the average price of a home, based on comparable housing characteristics to a reference base year. The M.L.S. Housing Price Index removes the fluctuations that may be impacted by changes in the sales volume of very expensive or

¹ Based on the Barrie Real Estate Board District Area which includes the City of Barrie, Town of Innisfil and Township of Springwater.



inexpensive home sales from one time period to the next. For the Barrie Area, this is important to consider given the price difference of homes within the City of Barrie relative to the surrounding area. On average, homes within the Town of Innisfil and the Township of Springwater tend to be priced higher than the City of Barrie.¹

It is important to recognize that higher-density units are not necessarily the most affordable units. Apartment units in the City of Barrie have an average price² that is approximately 15% higher than a townhouse unit.³ The price of a single/semi-detached unit⁴ is approximately 27% higher than an apartment and 36% higher than a townhouse unit.⁵

As summarized in Figure 3-4, the average price of a single/semi-detached house that sold in January 2019 in Barrie was approximately 122.7% higher than the average price of a house sold in January 2005.⁶ Housing prices for townhouses and apartment are approximately 124.7% and 111.9% higher than in 2005, respectively. The change in housing prices over the 2013 to the 2017 period was significantly higher for single/semi-detached houses compared to townhouses and apartments in Barrie. The downward adjustment to housing prices following the spring 2017 market was largely attributed to the following:

- Federal changes to mortgage lending rules announced in the fall of 2016;
- The introduction of a non-resident speculation tax of 15% for all residential properties located in the G.G.H., effective April 20, 2017; and

General Affordability by Housing Type within the City of Barrie

It is important to recognize that higher density units are not necessarily always the most affordable units. Apartment units in the City of Barrie have an average price that is approximately 15% higher than a townhouse unit.

¹ Based on average resale housing prices reported by the Barrie & District Association of Realtors and CMHC housing survey data of single/semi-detached new construction units.

² Ibid., Average price for an apartment unit as of January 2019 is \$344,400.

³ Ibid., Average price for a townhouse as of January 2019 is \$298,800.

⁴ Ibid, Average price for single/semi-detached as of January 2019 is \$468,800.

⁵ Ibid. It is noted that the relationship of housing prices of medium and high density housing varies across the G.G.H. municipalities. In reviewing housing affordability by structure type, total carrying costs should also be considered.

⁶ Price increase is 222.7 (2018 Index) minus 100.0 (2005 Index) = 122.7%.



- Several increases by the Bank of Canada to the prime lending rate in 2017 and 2018.

Figure 3-4
 Barrie Real Estate District¹
 Housing Price (MLS Sales) Index by Housing Type, 2005 to 2019, 2005 = 100

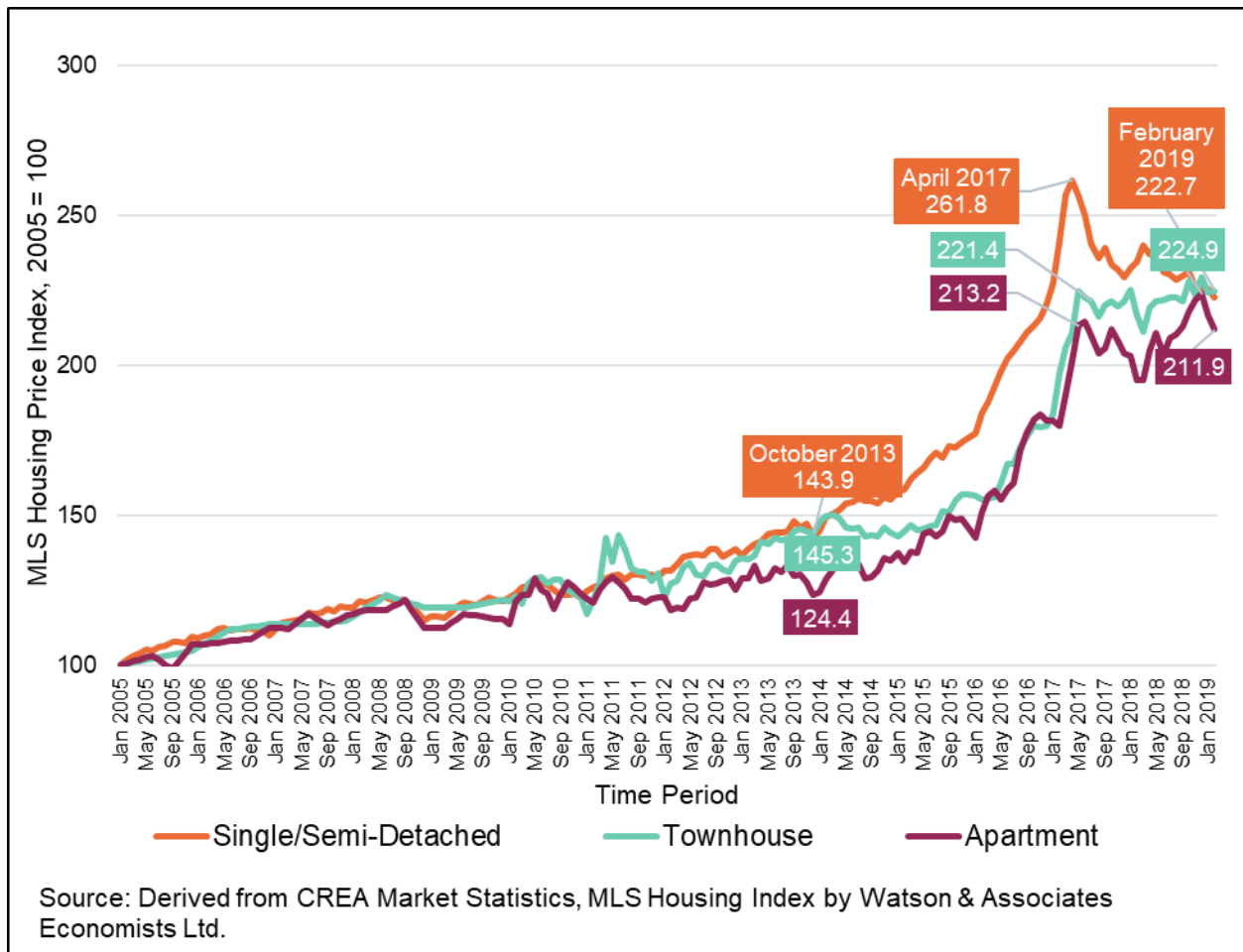


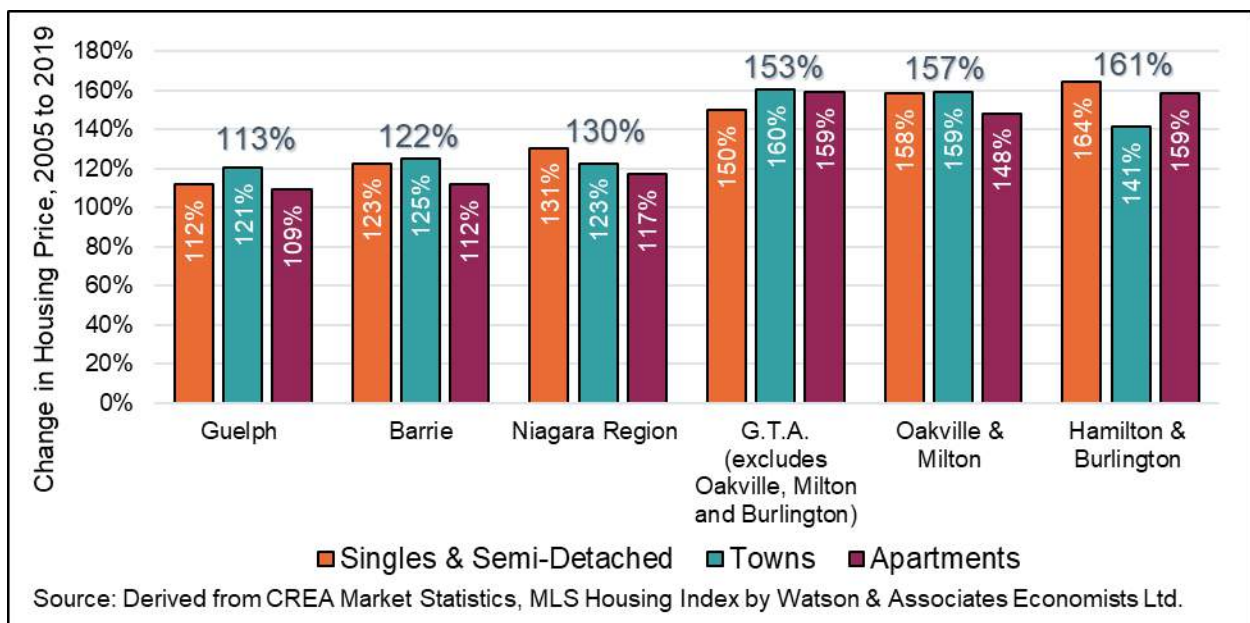
Figure 3-5 summarizes the change in average housing price by housing type for selected areas within the G.G.H. over the 2005 to 2019 period. As summarized, housing prices across the G.G.H. have increased significantly over the past 15 years, ranging from an increase of 109.3% for apartment units in Guelph to an increase of 164.2% for single/semi-detached housing in Hamilton and Burlington. Overall housing prices in Barrie have increased by 122% since 2005 which is higher than the housing

¹ Includes the City of Barrie, Town of Innisfil and the Township of Springwater.



price increase in Guelph, but lower than the Niagara Region and the municipalities surveyed in the Greater Toronto Hamilton Area (G.T.H.A). The average price of single/semi-detached dwellings in Hamilton/Burlington has increased by 161% since 2005, which represents the strongest price increase for this housing form of the municipalities surveyed.

Figure 3-5
Selected G.G.H. Municipalities
Change in Housing Price (MLS Sales) by Housing Type, 2005 to 2019



3.4.2.2 New Construction Housing Prices

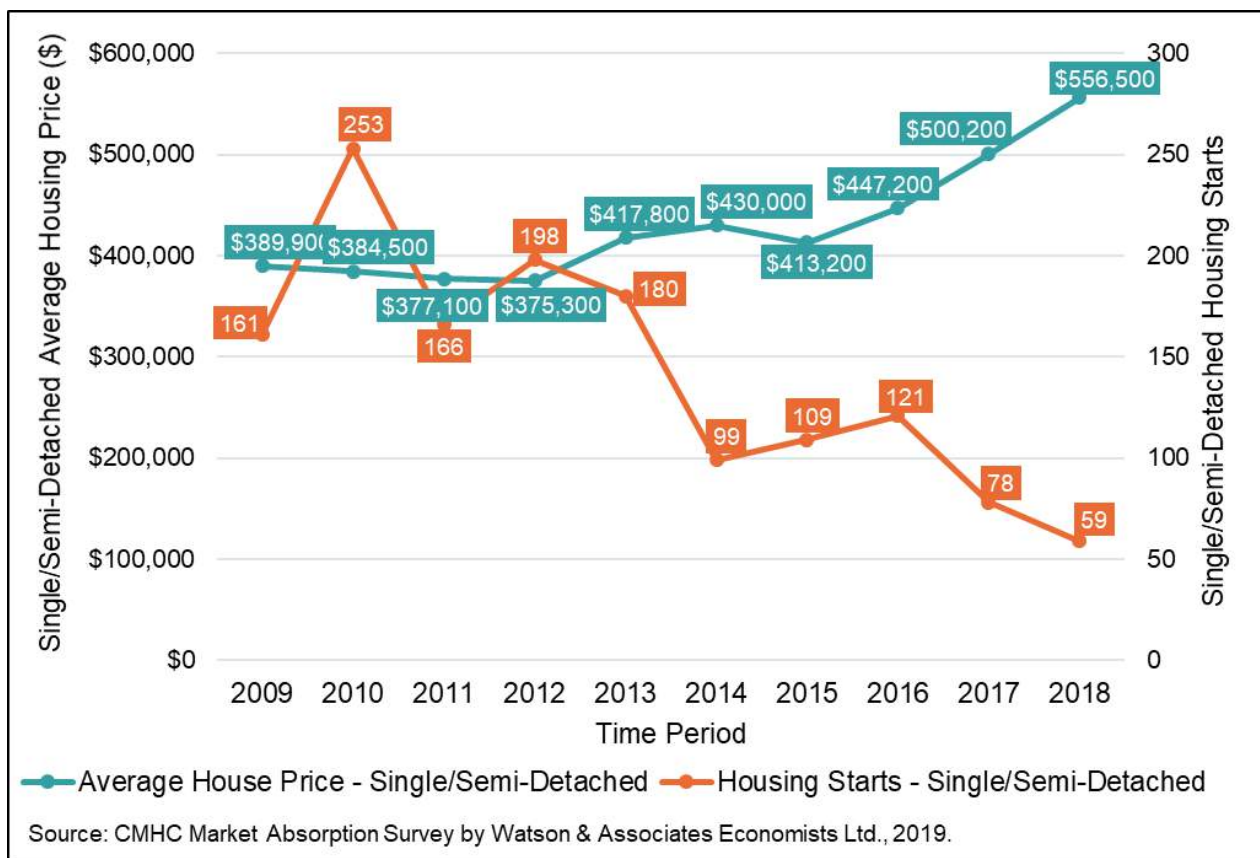
As of 2018, the average new construction housing price for a single/semi-detached dwelling unit in the City of Barrie was \$556,500 and \$721,000 within the Barrie C.M.A. Relative to the City of Barrie, the average housing price for new single/semi-detached dwelling units within the Barrie C.M.A. is higher, primarily due to higher housing prices within the Town of Innisfil (\$699,600) and the Township of Springwater (\$829,700) which, combined, accounted for 87% of the new single/semi-detached dwelling units constructed within the Barrie C.M.A. in 2018.¹ Comparatively, in 2010, the Town of Innisfil and the Township of Springwater accounted for under a third (31%) of single/semi-detached dwellings constructed within the Barrie C.M.A. While new

¹ Based on CMHC Market Housing Absorption Survey data.



construction housing prices for single/semi-detached units have increased by 43% in the City of Barrie since 2009, it is important to note that there has been limited new housing construction within the City of Barrie for single/semi-detached dwelling units over the past decade, as summarized in Figure 3-6.

Figure 3-6
City of Barrie
Historical Trends in New Construction Housing Prices
and Housing Starts for Single/Semi-Detached Housing
2009 to 2018



3.4.3 Overview of Housing Rental Market Trends

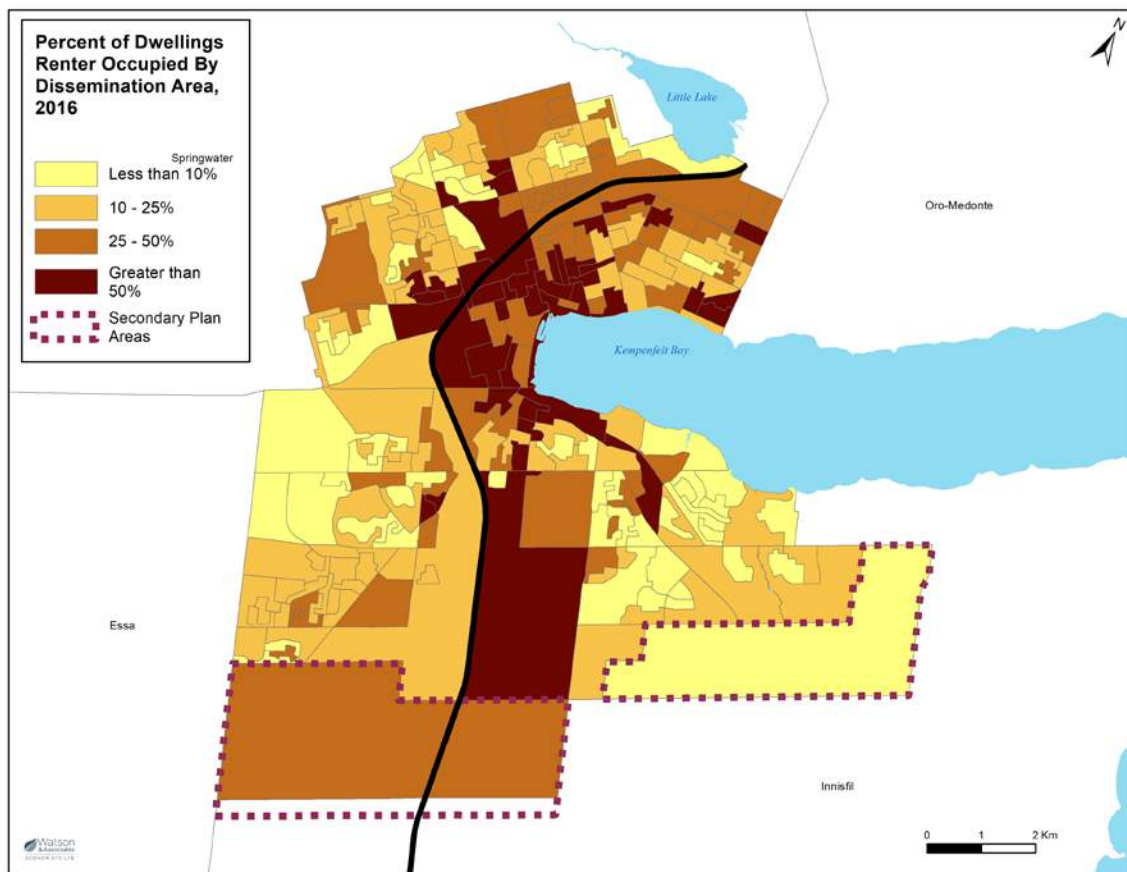
3.4.3.1 Supply of Tenant Occupied Housing Units

As of 2016, the City had an inventory of 4,320 tenant-occupied households. Figure 3-7 illustrates the location of renter-occupied households in Barrie. The highest prevalence



of rental households occurs in the City's most mature neighbourhoods which offer a relatively higher proportion of high-density households.

Figure 3-7
City of Barrie
Geographic Distribution of Renter-Occupied Households



Figures 3-8 through 3-10 summarize the composition of rental households by building type, unit size and family occupancy. Key highlights include:

- The majority (28%) of households are comprised of apartments within buildings that have fewer than five storeys;
- 54% of rental households are 2-bedroom units, 28% are 1-bedroom households, 15% are 3-bedroom households and 3% are bachelor households; and
- Approximately 44% of renters are one-person households, while couple family households without children account for 17%, lone-parent family households 17%, and couple family households with children account for 14%.



Figure 3-8
City of Barrie
Composition of Rental Units by Building Type, 2016

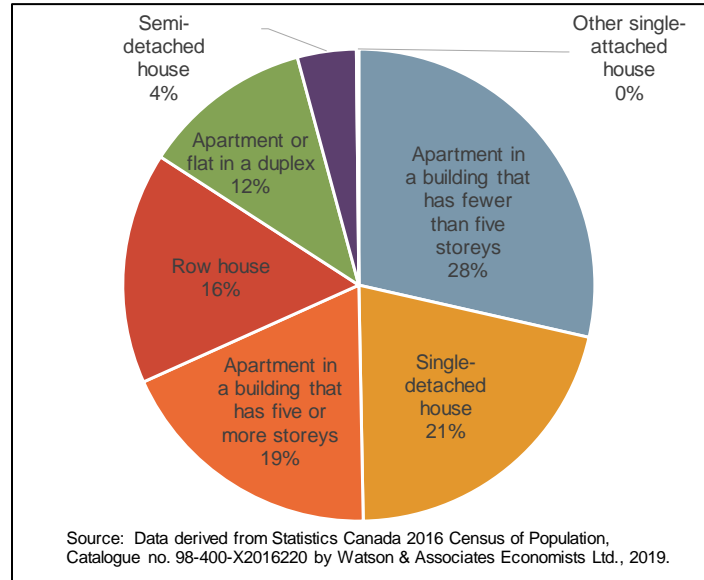


Figure 3-9
City of Barrie
Composition of Rental Units by Unit Size, 2018

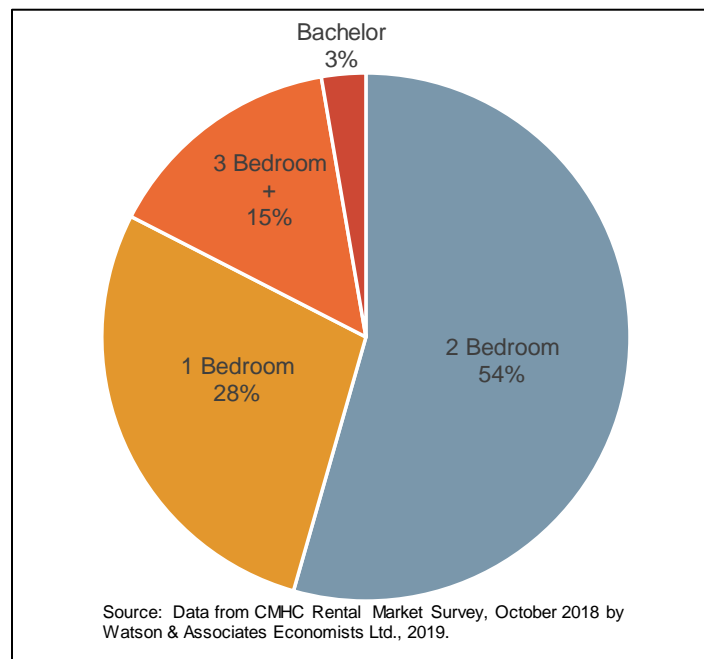
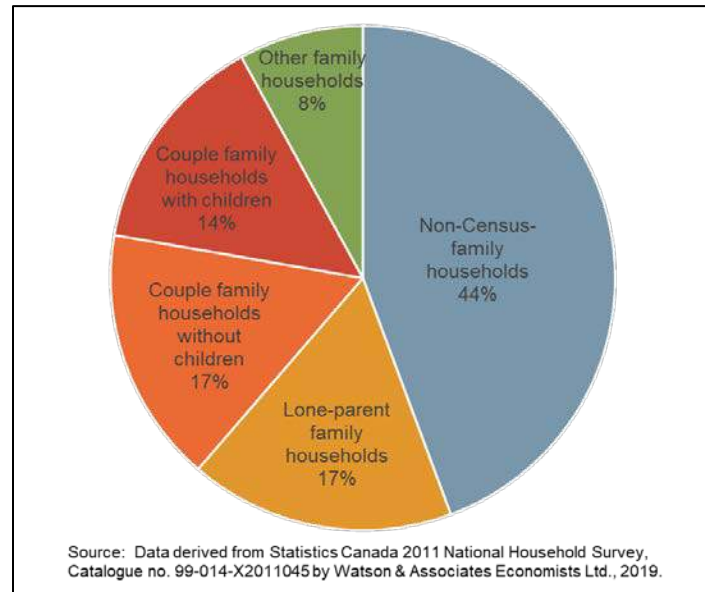




Figure 3-10
City of Barrie
Composition of Renters by Family Structure, 2011



3.4.3.2 Market Rental Rates

Figures 3-11 through 3-14 summarize trends regarding average market rents for apartments between 2008 to 2017 within the City of Barrie. As observed:

- In 2017, average monthly rental costs in Barrie range from \$766 for a bachelor apartment, \$1,039 for a 1-bedroom unit, \$1,200 for a 2-bedroom unit and \$1,418 per month for a 3-bedroom+ unit;
- Over the 2008 to 2017 period, annual rental cost increases have averaged 1.9% for 1-bedroom units, 2.3% for 2-bedroom units, 2.7% for 3-bedroom+ units, and 1% for bachelor units. The change in annual rent costs has averaged well above the change in the Canada Price Index (C.P.I.) of 1.7% over this period; and
- Apartment rents in Barrie are generally comparable to the provincial average at approximately \$1,200 for 2-bedroom units in 2017. The increase in rental rates in Barrie over the 2008 to 2017 period has also been generally consistent with the provincial average.



Figure 3-11
City of Barrie
Average Apartment Rental Rates by Unit Type, 2008 to 2017

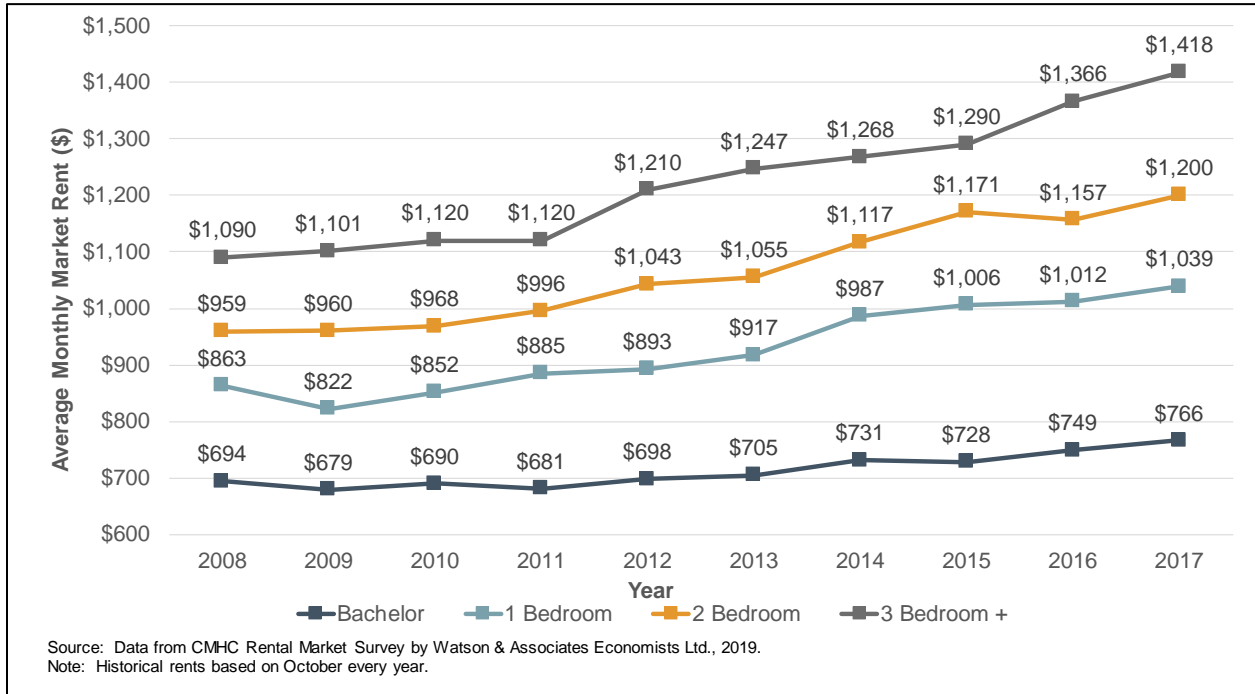


Figure 3-12
City of Barrie
Average Annual Apartment Rental Rate Increase by Unit Type, 2008 to 2017

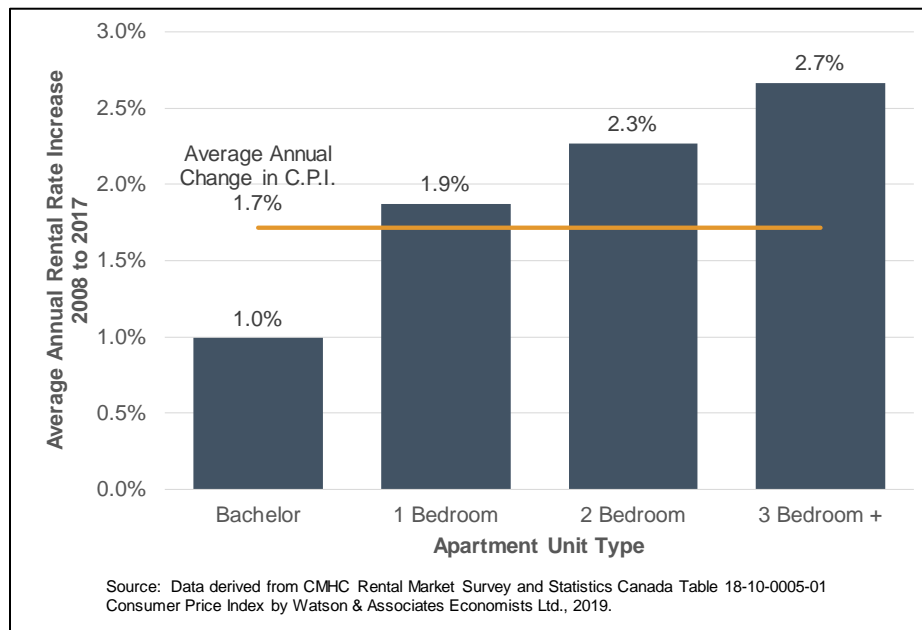
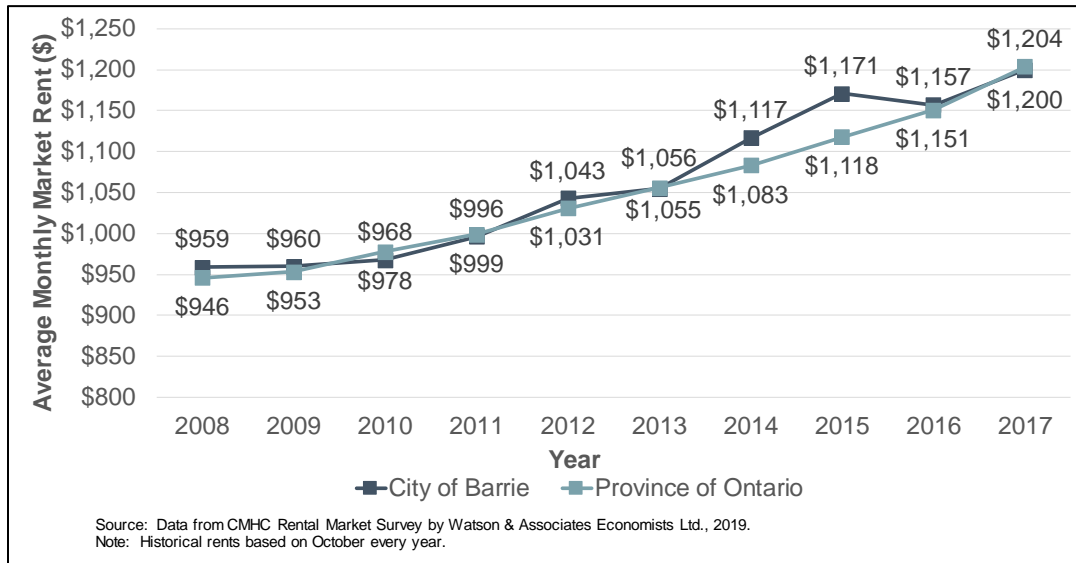




Figure 3-13
City of Barrie
2-Bedroom Apartment Average Rental Rates, 2008 to 2017



3.4.3.3 Rental Vacancy Rates

Figure 3-14 provides a summary of average rental vacancy rates for 1-, 2- and 3-bedroom apartments over the past decade. As shown, as of 2015, the overall vacancy rate was 1.3%, a decade low. Since then, the vacancy rate has increased to 2.7% as of 2017. The City rental vacancy rate has declined steadily from a peak of 3.8% in 2009.

Figure 3-14
City of Barrie
Average Apartment Vacancy Rates by Unit Type, 2008 to 2017

Year	Bachelor	1 Bedroom	2 Bedroom	3 Bedroom +	Total
2008	**	2.4	3.9	0.6	3.5
2009	11.7	3.9	3.4	0.6	3.8
2010	6.8	3.7	2.9	4.7	3.4
2011	13	1.2	1.3	0	1.7
2012	**	2.4	1.1	**	2.0
2013	9.4	3	2.5	4	3.0
2014	**	1.7	1.6	1	1.6
2015	5.5	1.1	1	2.6	1.3
2016	13	1.7	2	1.8	2.2
2017	**	1.9	3.4	0.5	2.7

Source: Data from CMHC Rental Market Survey by Watson & Associates Economists Ltd., 2019.

Note: ** Data suppressed to protect confidentiality or data not statistically reliable.



3.5 City of Barrie Housing Affordability Trends, 2006 to 2016

3.5.1 Household Income

Household income is a key component to determining relative housing affordability in a community. Average household income and prevalence of low-income households in Barrie is reviewed herein.

3.5.1.1 Average Household Income

Figure 3-15 summarizes the average household income in the City of Barrie in 2016 compared to Simcoe County and the provincial average. Figure 3-16 presents the proportionate share of households in the City of Barrie, Simcoe County and the Province which earned less than \$30,000 per year. Key observations include:

- The City of Barrie has an average household income of \$92,000 which is comparable to that of Simcoe County, but moderately lower than the provincial average of \$97,900; and
- Within the City of Barrie, 43.7% of households earned less than \$30,000 per year. This is marginally higher than Simcoe County at 43.4%, but lower than the provincial average of 44.0%.

Figure 3-15
City of Barrie
Average Household Income, 2016

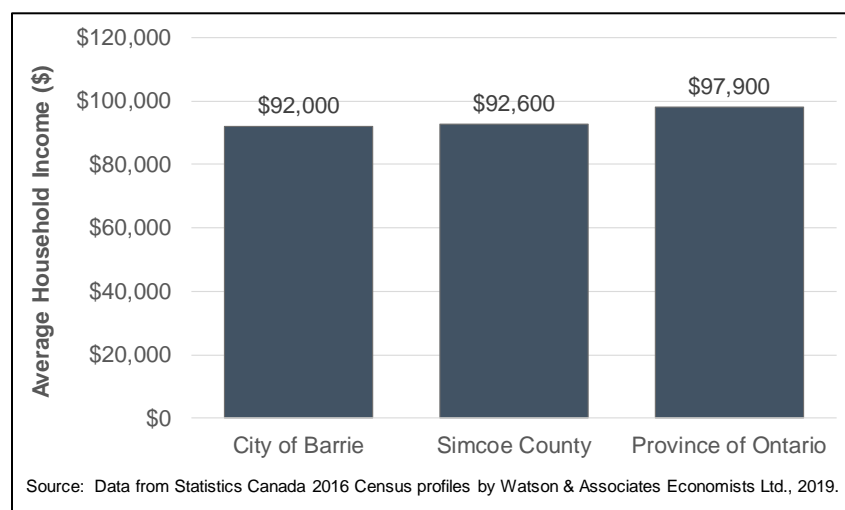
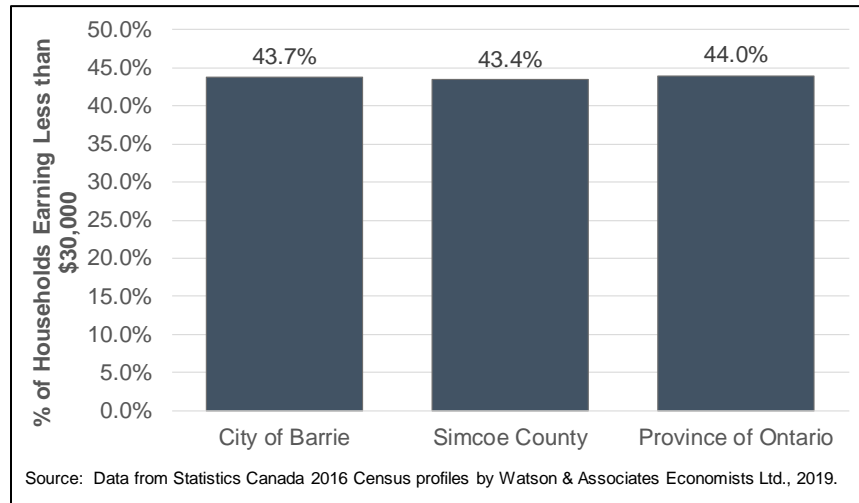


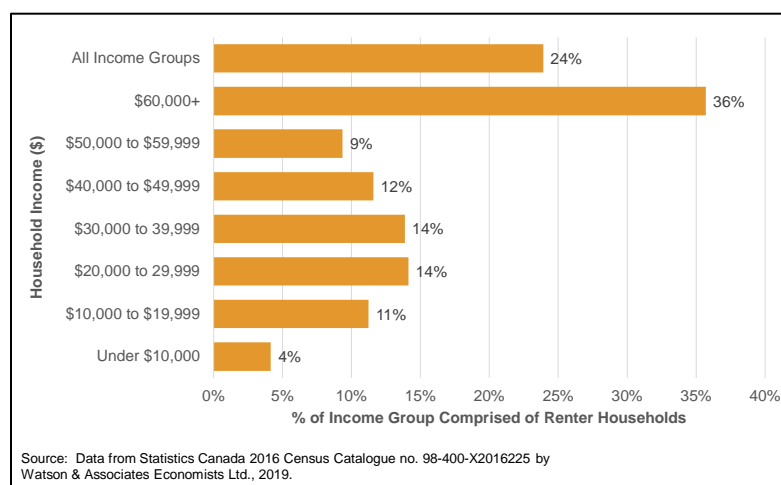


Figure 3-16
City of Barrie
Percentage of Households Earning Less than \$30,000, 2016



Low-income households, generally defined as those earning less than \$30,000 per year, are largely renters as home ownership is not typically financially viable. As shown in Figure 3-17, 15% and 14% of Barrie households earning less than \$20,000 per year and between \$20,000 and \$29,999 per year, respectively, are renters. This is compared to 24% for all income groups and 36% for households earning \$60,000 or more per year.

Figure 3-17
Barrie C.M.A.
Proportionate Share of Renters by Household Income, 2016

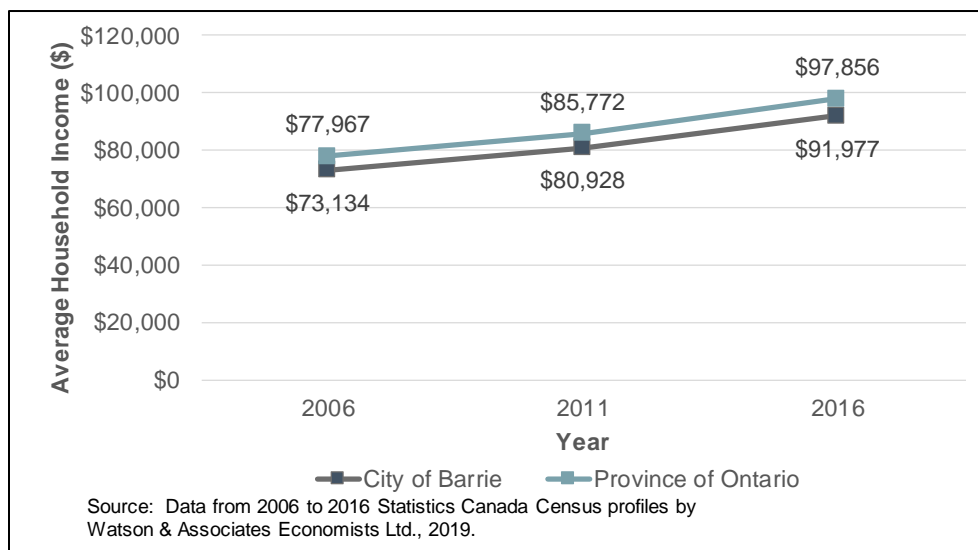




3.5.1.2 Household Income Growth Trends

Figure 3-18 illustrates the average household income in the City of Barrie and the provincial average over the past decade. As shown, average household income in Barrie increased from \$73,100 in 2006 to \$92,000 in 2016, an annual average increase of 2.3%, above the rate of inflation during the period. This is comparable to the Province of Ontario, where average household incomes rose from \$78,00 in 2006 to \$97,900 in 2016, also an average annual increase of 2.3%.

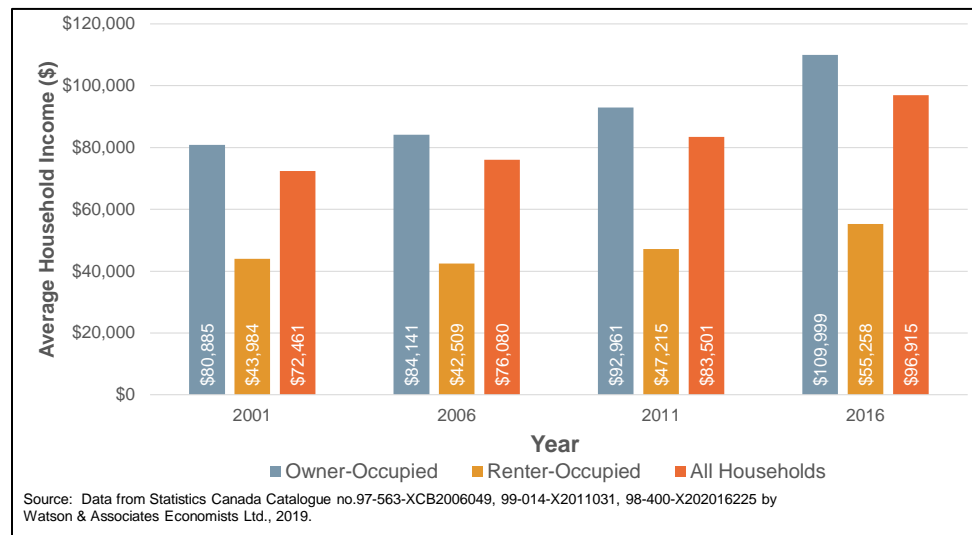
Figure 3-18
City of Barrie
Average Household Income, 2006 to 2016



Though average household incomes in Barrie have been rising at a relatively strong rate, the growth rates between owner- and tenant-occupied households has not been uniform. As shown in Figure 3-19, the average household income of Barrie homeowners increased from \$80,885 to \$109,999, growing by 36% over the 15-year period. In contrast, the average household income of renters increased at a slower pace over this historical period, from \$43,984 in 2001 to \$55,258 in 2016, representing a 26% increase.



Figure 3-19
Barrie C.M.A.
Average Household Income by Housing Tenure
(Constant 2015 dollars), 2001 to 2016



3.5.1.3 Prevalence of Low-Income Households

The prevalence of low-income households¹ is a good indicator of the demand for affordable housing. Figure 3-20 summarizes the prevalence of low income within private households in the City of Barrie in comparison to Simcoe County and the provincial average over the 2006 through 2016 period. Figure 3-21 identifies the prevalence of low-income households in Barrie. Key observations include:

- In 2016, of the private households in Barrie, 12.1% are defined as low income which is lower than the provincial average (14.4%) but slightly higher than the Simcoe County average of 11.4%; and

¹ Prevalence of low income defined by Statistics Canada as the proportion of persons in private households with incomes below the Statistics Canada low-income measure, after tax (L.I.M.A.T.). The L.I.M.A.T. refers to a fixed percentage (50%) of median-adjusted after-tax income of private households. The household after-tax income is adjusted by an equivalence scale to take economies of scale into account. This adjustment for different household sizes reflects the fact that a household's needs increase, but at a decreasing rate, as the number of members increases.



- The prevalence of low-income households in Barrie significantly increased from 8.4% in 2006 to 12.2% in 2011, but in the past five years, has remained relatively stable.

Figure 3-20
City of Barrie
Prevalence of Low Income within Private Households¹ 2006 to 2016

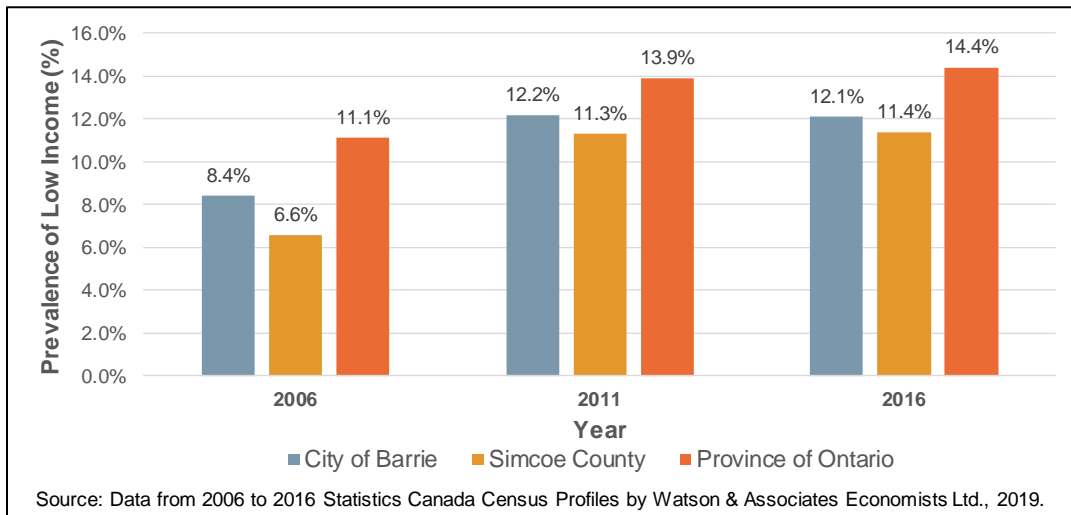


Figure 3-21
City of Barrie
Prevalence of Low Income (Before Tax) by Family Structure Type, 2006

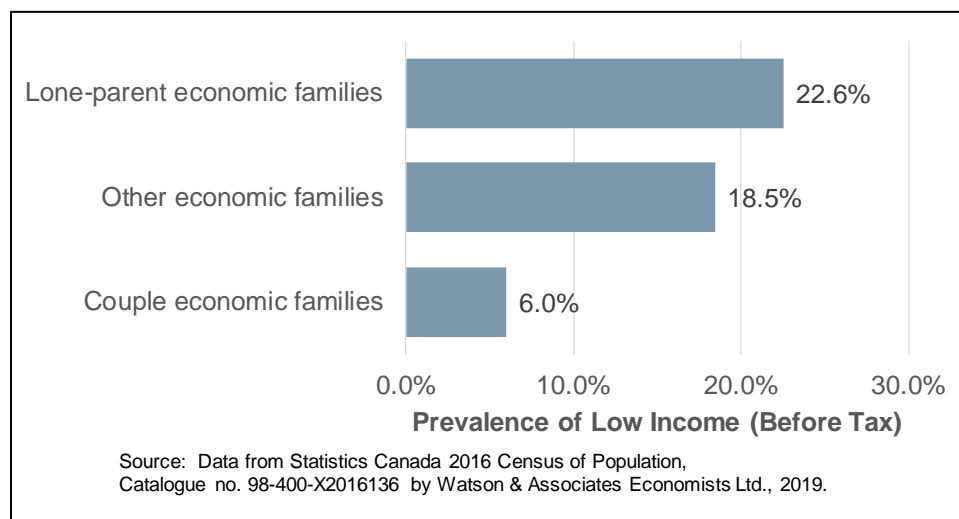
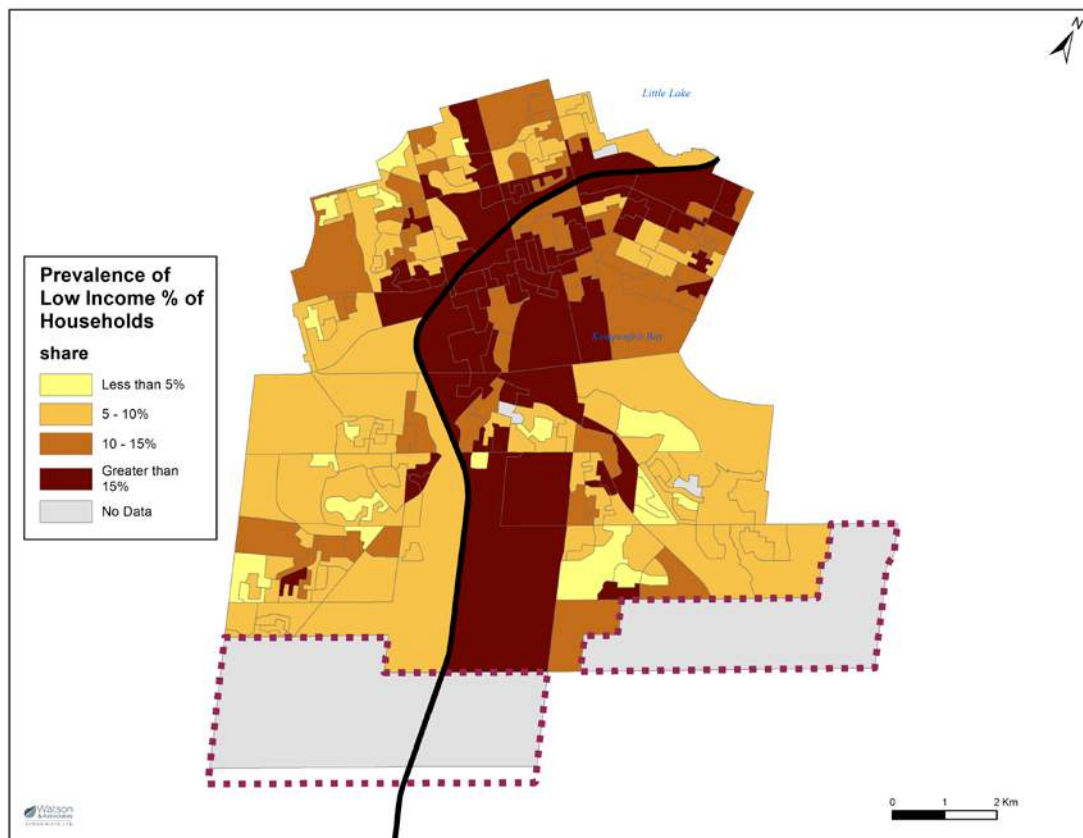


Figure 3-22 illustrates the geographic distribution of low-income households within Barrie. As illustrated, the highest prevalence of low-income households occurs in the



City's mature neighbourhoods largely located in the north end as well as along the Highway 400 corridor.

Figure 3-22
City of Barrie
Geographic Distribution of Low-Income Households



3.5.1.4 Affordability of Home Ownership

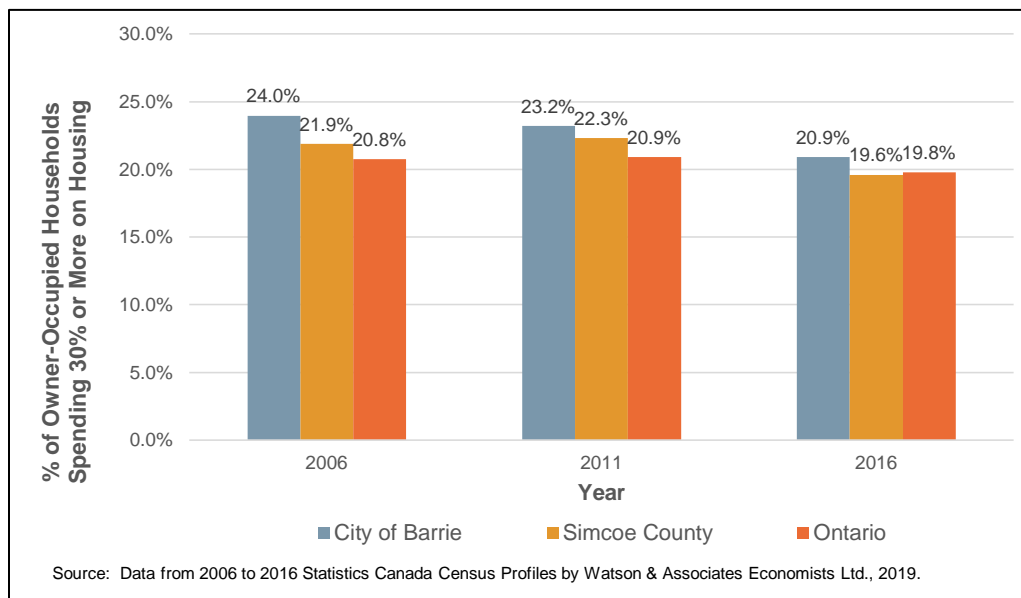
Figure 3-23 provides a summary of owner-occupied housing affordability in Barrie compared to the County of Perth and the provincial average from 2006 to 2016. Observations include:

- In 2016, 21% of Barrie's owner-occupied households spent 30% or more of household income on housing costs, which is slightly higher than Simcoe County and the provincial average (20% and 20%, respectively); and
- Between 2006 and 2016, the proportion of owner-occupied households in Barrie that spent 30% or more of household income on housing costs decreased slightly



from 24% to 21%. In comparison, the decreases in Simcoe County and the Province as a whole were more modest. It is important to note that while the portion of owner-occupied households spending 30% or more of household income has declined slightly over the 10-year historical period reviewed within the City of Barrie, it does not include prospective home buyers, in particular first-time home buyers, that may be unable to afford home ownership. Generally, housing ownership has become less affordable across the G.G.H., as home prices have increased at a higher rate relative to household incomes.

Figure 3-23
City of Barrie
% of Owner-Occupied Households Spending
30% or More of Income on Housing, 2006 to 2016



3.5.1.5 Rental Market Affordability

Figure 3-24 provides a summary of tenant-occupied housing affordability in Barrie compared to the County of Simcoe and the provincial average, from 2006 to 2016. Observations include:

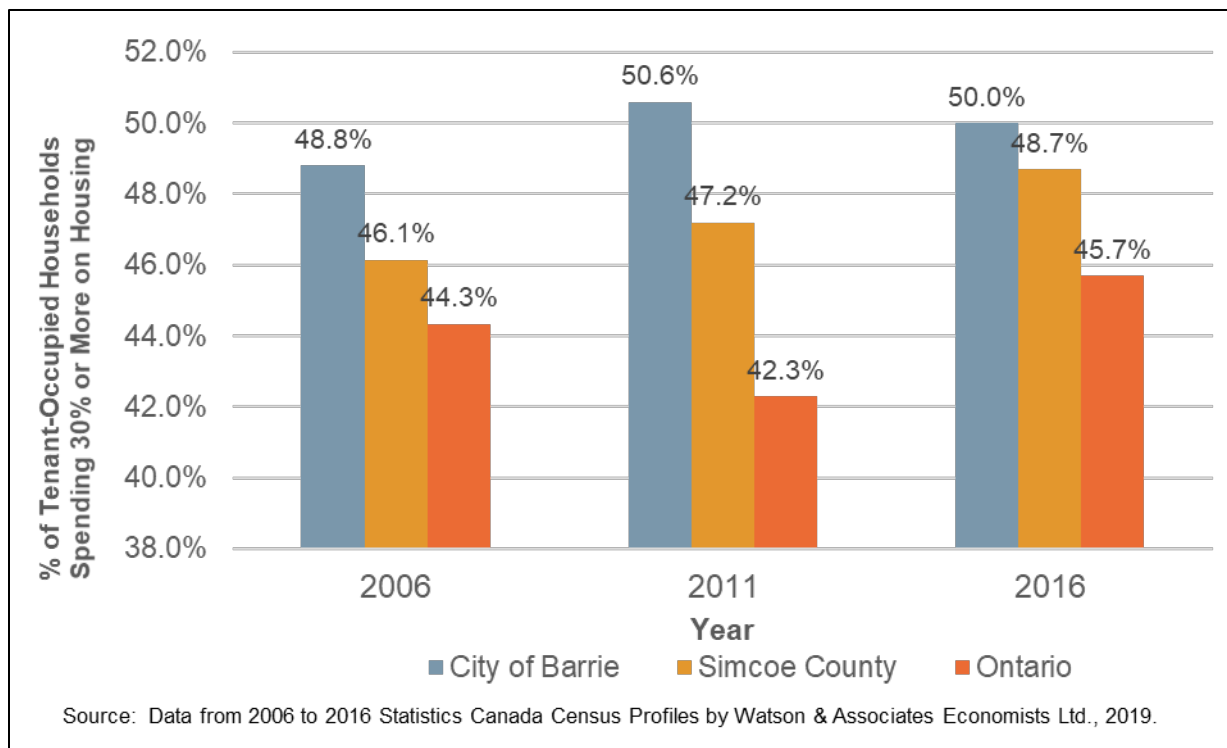


- In 2016, 50% of Barrie's tenant-occupied households spent 30% or more of household income on housing costs, which was higher than Simcoe County (49%) and the provincial average (46%); and
- Tenant-occupied housing has become less affordable. Between 2006 and 2016, the proportion of owner-occupied households that spent 30% or more of household income on housing costs increased slightly in Barrie, which was generally consistent with the trend within Simcoe County.

Percentage of Tenant-Occupied Households in the City of Barrie Spending 30% or More of Income on Housing

2006 – 48.8%
2011 – 50.6%
2016 – 50.0%

Figure 3-24
City of Barrie
% of Tenant-Occupied Households Spending
30% or More of Income on Housing, 2006 to 2016





3.6 City of Barrie Vacant Designated Residential Land Supply by Location and Development Approvals Status

3.6.1 Approach

This section summarizes the supply of potential housing units on designated vacant lands by planning policy area (U.G.C., nodes and corridors, remaining B.U.A. and D.G.A.) and planning application status.¹ Further details are also provided regarding the potential housing supply by structure type.² The supply of potential housing was completed by the City of Barrie as of January 2019. The summary also includes housing potential through intensification, which is discussed in further detail in Chapter 4 of this report.

3.6.2 Location and Status of Potential Housing Units

The City of Barrie has an estimated potential housing supply of approximately 71,100 housing units³ as of January 2019 to accommodate future residential development. Figures 3-25a and 3-25b provide a summary of the potential supply of housing units on vacant designated residential lands within the City of Barrie by development approvals status within the planning process and by planning policy location. Figure 3-25c provides further details on the housing potential by planning policy area and status. Figure 3-25d provides a location map of potential housing within the City of Barrie.

City of Barrie total estimated housing supply potential on vacant residential lands, January 2019

71,100 housing units

As summarized in Figure 3-25a, over half (55%) the City's estimated potential housing supply exists as intensification opportunities within the B.U.A., including opportunities for secondary suites. Additional intensification opportunities (representing approximately 7% of the unit potential) have been identified in the Barrie South M.T.S.A.

¹ Housing potential has been summarized according to the following: in the planning process (registered and not built, draft approved and application under review), vacant D.G.A. lands with no active application and potential intensification opportunities with no active applications.

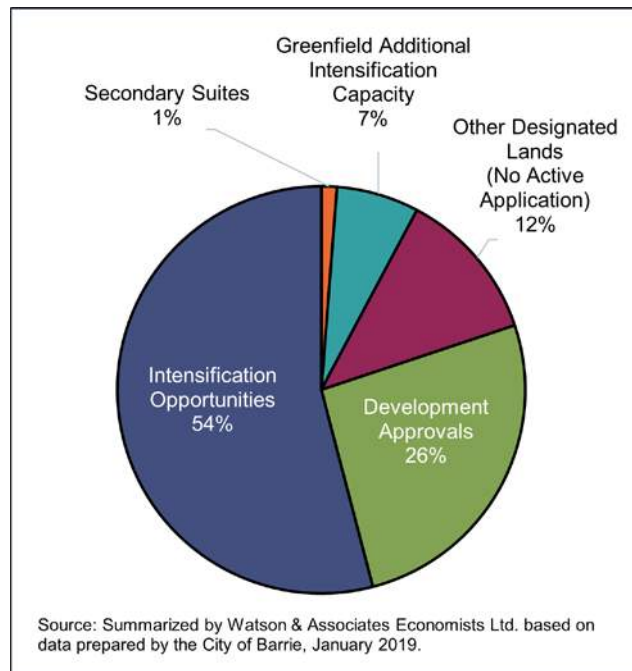
² Singles/semi-detached, townhouses and apartments.

³ Based on a higher-end range of the unit yield for potential intensification sites as identified by the City of Barrie. The lower-end range reduces the City-wide potential to 52,340 potential housing units, a reduction to the potential of 26%.



An assessment of future development potential within the Barrie South M.T.S.A. is provided in Chapter 4. Of the City's total future housing supply opportunities, approximately 26% of housing unit potential has been identified within the development approvals process, while the remaining 13% of the City's housing unit potential falls within vacant designated residential lands with no active planning applications at this time.

Figure 3-25a
City of Barrie
Potential Housing Units on Vacant Designated Residential Land by Status
as of January 1, 2019



In terms of location, the D.G.A accounts for approximately 40% of the City's housing supply potential, of which the Salem and Hewitt's Secondary Plan Areas comprise approximately 65% of this supply. The City's B.U.A. represents approximately 60% of the City's remaining potential housing supply. As summarized in Figure 3-25c, it is estimated that the B.U.A. has the potential to accommodate 43,000 housing units, primarily through intensification. It is important to note that there is a relatively limited supply of approximately 3,900 potential housing units in the planning process on vacant

Potential housing units on City of Barrie vacant lands within the B.U.A.

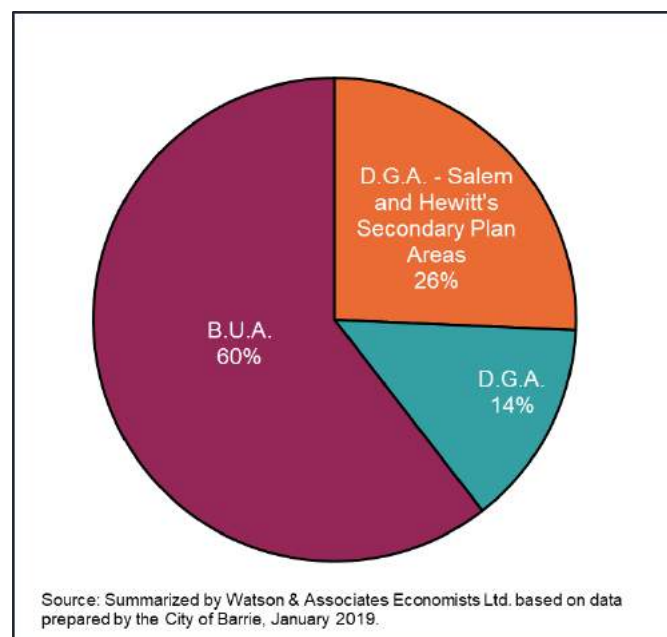
In the Planning Process: 3,900

Future Intensification Potential: 43,000



lands within the B.U.A. As such, future housing development on infill and redevelopment sites outside of active plans will need to represent a large share of future development within the City over the longer-term if the City is to achieve its intensification target and long-term population forecast by the year 2041.

Figure 3-25b
City of Barrie
Potential Housing Units on Vacant Designated Residential Land
by Planning Policy Area
as of January 1, 2019



As summarized in Figure 3-25c, the City's **housing supply is oriented towards high-density units**, as a large share of the City's potential housing supply has been identified as potential intensification. It is anticipated that the potential buildout of the City's identified housing intensification inventory would greatly exceed the 2041 planning horizon. Further, it is important to note that housing intensification potential has been assessed based on a relatively high-level review by the City. This review does not consider, in detail, the following variables; the adequacy of municipal infrastructure on a site-by-site basis; local site impediments; the feasibility of redeveloping or intensifying a site; as well as, the intentions and motivations of landowners.



Figure 3-25c
City of Barrie
Potential Housing Units on Vacant Designated Residential Land by Status
as of January 1, 2019

Location		Status	Housing Units			Total Units
			Low Density	Medium Density	High Density	
Built Boundary		Units in Development Approvals	115	1,025	2,721	3,861
		Other Designated Lands	0	0	0	0
		Intensification Opportunities ²	759	9,355	28,321	38,435
		Secondary Suites ³	0	0	705	705
		Total Supply	874	10,380	31,747	43,001
		<i>Unit Mix (%)</i>	2%	24%	74%	100%
Designated Greenfield Area	Designated Greenfield Area (excludes Salem and Hewitt's Secondary Plan Area)	Units in Development Approvals	960	0	3,348	4,308
		Other Designated Lands	371	142	176	689
		Additional Intensification Capacity (Barrie South M.T.S.A.) ⁴	0	0	4,645	4,645
		Secondary Suites ³	0	0	175	175
		Total Supply	1,331	142	8,344	9,817
		<i>Unit Mix (%)</i>	14%	1%	85%	100%
	Salem and Hewitt's Secondary Plan Areas	Units in Development Approvals	5,659	2,586	2,108	10,353
		Other Designated Lands	2,607	1,042	4,258	7,907
		Total Supply	8,266	3,628	6,366	18,260
		<i>Unit Mix (%)</i>	45%	20%	35%	100%
	Total Designated Greenfield Area	Units in Development Approvals	6,619	2,586	5,456	14,661
		Other Designated Lands	2,978	1,184	4,434	8,596
		Additional Intensification Capacity (Barrie South M.T.S.A.) ⁴	0	0	4,645	4,645
		Secondary Suites ³	0	0	175	175
		Total Supply	9,597	3,770	14,710	28,077
<i>Unit Mix (%)</i>		34%	13%	52%	100%	
Total City of Barrie	Units in Development Approvals	6,734	3,611	8,177	18,522	
	Other Designated Lands	2,978	1,184	4,434	8,596	
	Intensification Opportunities ²	759	9,355	28,321	38,435	
	Additional Intensification Capacity (Barrie South Transit Station) ⁴	0	0	4,645	4,645	
	Secondary Suites ³	0	0	880	880	
	Total Supply	10,471	14,150	46,457	71,078	
	<i>Unit Mix (%)</i>	15%	20%	65%	100%	

Source: Summarized by Watson & Associates Economists Ltd. based on data prepared by the City of Barrie, January 2019.

¹Low-density units include singles & semi-detached; medium-density units include townhouses; and high-density units include apartments.

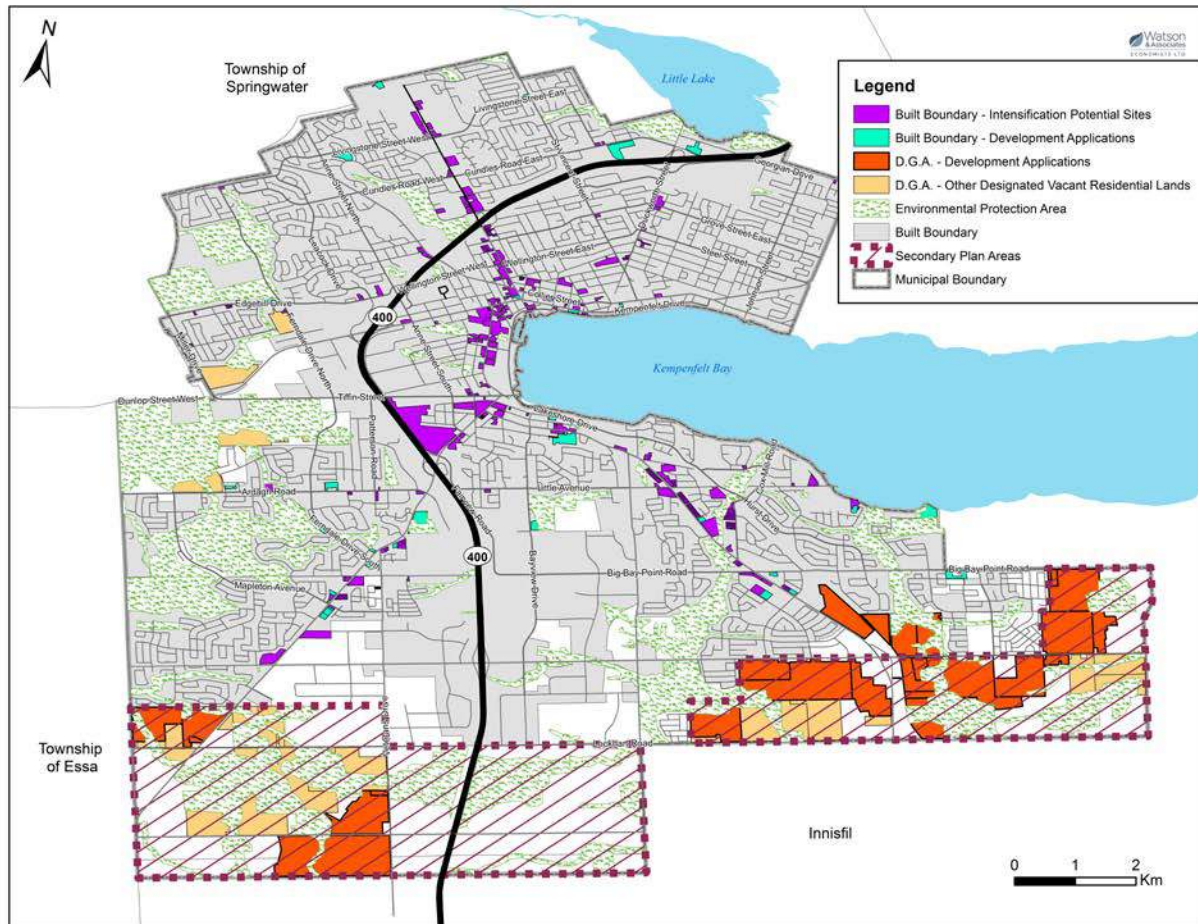
²Based on high range of unit yield prepared by the City of Barrie, January 2019.

³Based on 40 secondary suites annually over the 2019 to 2041 period, assumes 80% within the built boundary and the remaining 20% in the D.G.A.

⁴Additional intensification capacity based on an estimate by Watson & Associates Economists Ltd. of intensification opportunities surrounding the Barrie South GO Station of approximately 4,650 units (north of Mapleview Drive).



Figure 3-25d
City of Barrie
Vacant Designated Residential Land by Status
as of January 1, 2019



3.7 City of Barrie Long-Term Population Forecast to 2041

3.7.1 City-Wide Population Forecast

As previously identified, the long-term total population forecast for the City of Barrie for the years 2031B, 2036 and 2041 is set out in Schedules 3 and 7 of the Growth Plan, 2019 for the G.G.H.¹ As previously mentioned, the 2018 City of Barrie Long-Term

¹ It is noted that the Scenario 1 2031 population and employment forecast is consistent with the current City of Barrie O.P.



Growth Scenarios Review¹ provides further details with respect to the phasing and location of the recommended population and housing growth forecast (Scenario 3, Made in Barrie Growth Scenario) by planning policy area and traffic zone over the 2016 to 2041 forecast period. Figure 3-26 summarizes the population growth forecast for the City. As previously mentioned, between 2016 and 2041, the City's population is forecast to increase by 107,200 persons from 145,800 to 253,000. This represents an average annual population increase of 2.2%, which is well above the provincial average for this period (approximately 1.0% annually).

**Annual Population
Growth Rate,
2016 to 2041**

City of Barrie – 2.2%

Province – 1.0%

¹ Long-Term Growth Scenarios Review. City of Barrie. Summary of Growth Forecast Assumptions and Methodology of Key Findings – Final Report. October 26, 2018.



Figure 3-26
City of Barrie
Population Growth Forecast, 2016 to 2041¹

Period	Population (excludes undercount) ¹	Population (includes undercount) ¹
1996	79,200	81,600
2001	103,700	107,000
2006	128,400	132,400
2011	135,700	140,000
2016	141,400	145,800
2021	162,600	167,600
2026	183,500	189,200
2031	203,700	210,000
2036	224,000	231,000
2041	245,400	253,000
Historical Growth Increment		
1996-2001	24,500	25,400
2001-2006	24,700	25,400
2006-2011	7,300	7,600
2011-2016	5,700	5,800
1996-2016	62,200	64,200
Forecast Growth Increment		
2016-2021	21,200	21,800
2021-2026	20,900	21,600
2026-2031	20,200	20,800
2031-2036	20,300	21,000
2036-2041	21,400	22,000
2016-2041	104,000	107,200

Source: Watson & Associates Economists Ltd., 2019.

¹Census undercount estimated at approximately 3%. Note: Population including the undercount has been rounded.

¹ Census undercount estimated at approximately 3%. The net Census undercount represents the net number of persons missed during Census enumeration.



3.7.2 Population Forecast by Planning Policy Area

Figure 3-27 geographically illustrates the City's planning policy areas, including the U.G.C., B.U.A., Intensification Nodes and Corridors, D.G.A. and Special Rural Area (lands for potential future development post-2031). The allocation of the City's population forecast is summarized below in Figure 3-28a by B.U.A. and D.G.A. Figure 3-28b provides further details regarding the breakdown of population by specific policy areas (i.e. U.G.C., Intensification Nodes and Corridors, Secondary Plan Areas and remaining areas). The share of population growth by area within the B.U.A. is summarized in Figure 3-29 and highlighted below.

City of Barrie Summary of Population Growth by Planning Policy Area, 2016 to 2041

- The City of Barrie is forecast to add 107,200 persons to its population base over the 2016 to 2041 period. Of this total, approximately 62% is anticipated to be accommodated within the City's D.G.A., while the remaining 38% of forecast population has been allocated within the City's B.U.A.¹
- The Salem and Hewitt's Secondary Plans are anticipated to accommodate almost half (47%) the City's population growth over the 2016 to 2041 period.
- Over the longer term, a large portion (12%) of population growth in the City's D.G.A. is forecast to be accommodated in high-density developments within 500 metres of the Barrie South GO Station.² While these lands are considered outside the B.U.A. and do not contribute to the City's residential intensification target, these lands will contribute towards population growth within the City's Intensification Nodes and Corridors. Further details of the potential surrounding the Barrie GO Station is provided in Chapter 4, as part of the Barrie South GO M.T.S.A. analysis.

¹ Represents population by planning policy area. It is noted that housing shares by planning area differs from population shares due to P.P.U. assumptions. This is discussed later in this chapter.

² This includes only potential intensification sites surrounding the Barrie South GO Station. The Barrie South M.T.S.A. includes a broader area which is discussed in Chapter 4.



- Within the City of Barrie B.U.A., the largest share of population growth (44%) is anticipated to be accommodated in the City's Intensification Nodes and Corridors, followed by the U.G.C (32%) and the remainder of the B.U.A. (24%).

Figure 3-27
City of Barrie
Planning Policy Areas

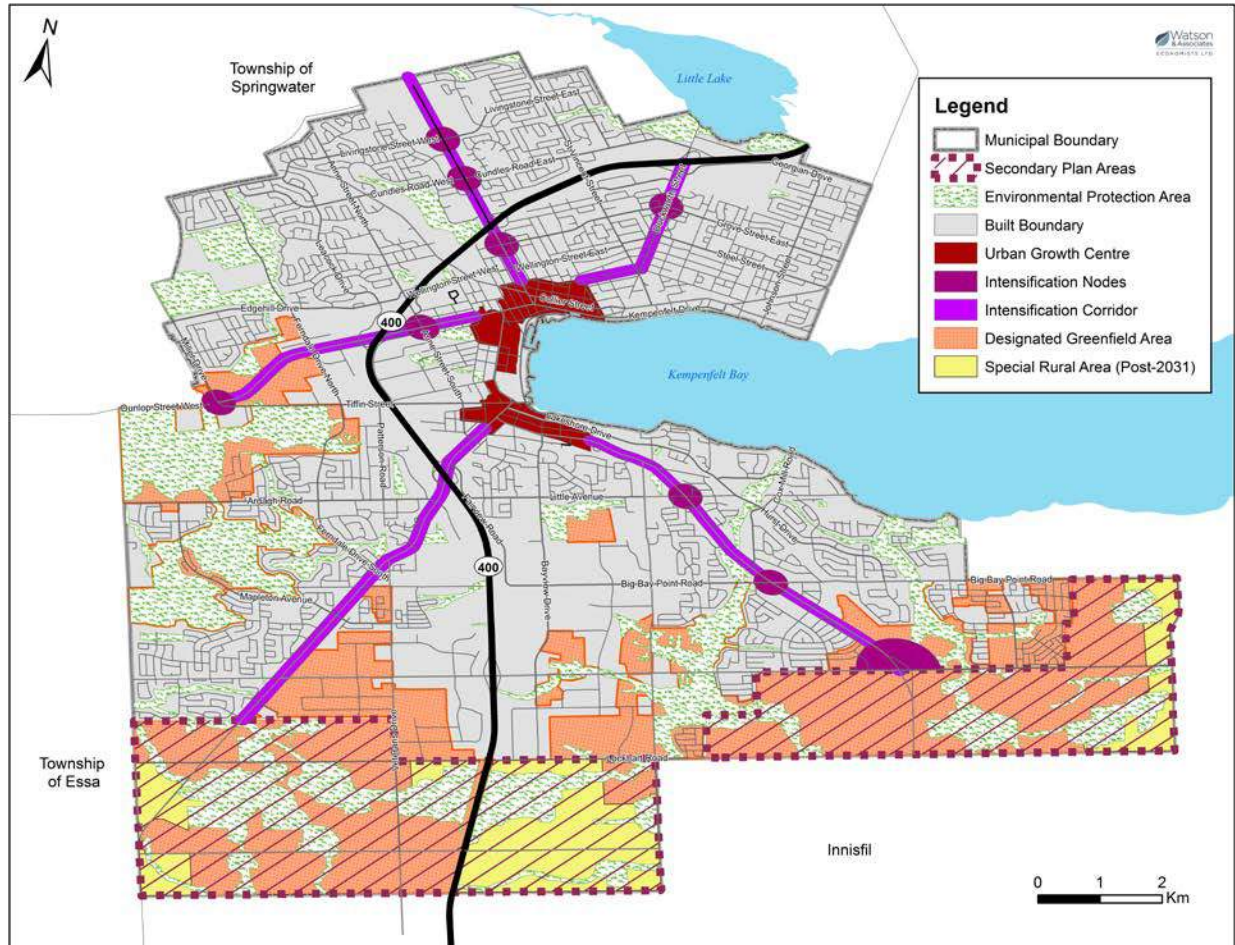




Figure 3-28a
City of Barrie
B.U.A. and Greenfield Area
Population Forecast to 2041

Period	Population (includes undercount) ¹		
	B.U.A.	Greenfield Area ²	Total Population
2016	136,300	9,500	145,800
2021	139,300	28,300	167,600
2031	154,400	55,600	210,000
2041	177,000	76,000	253,000
Growth Increment			
2016-2021	3,000	18,800	21,800
2021-2031	15,100	27,300	42,400
2031-2041	22,600	20,400	43,000
2016-2041	40,700	66,500	107,200
Share of Growth			
2016-2021	14%	86%	100%
2021-2031	36%	64%	100%
2031-2041	53%	47%	100%
2016-2041	38%	62%	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).

Further details of the population forecast by planning policy area are provided in Appendix A.



Figure 3-28b
City of Barrie
Population Growth Forecast by Area
2016 to 2041

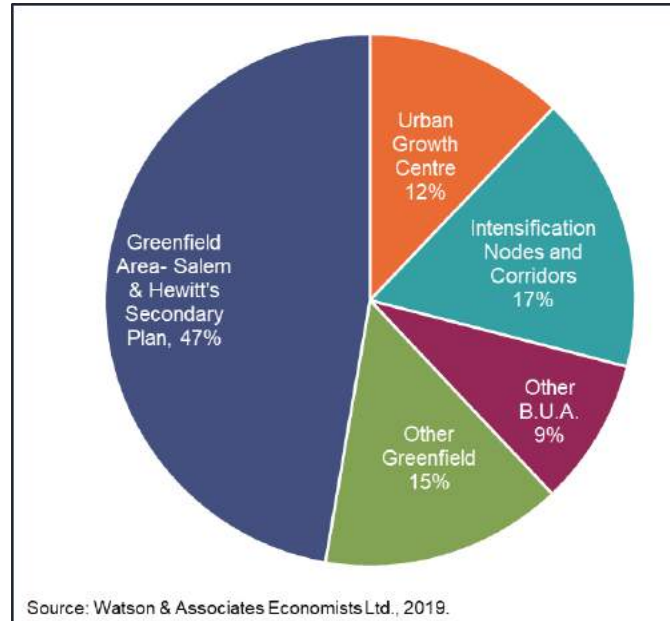
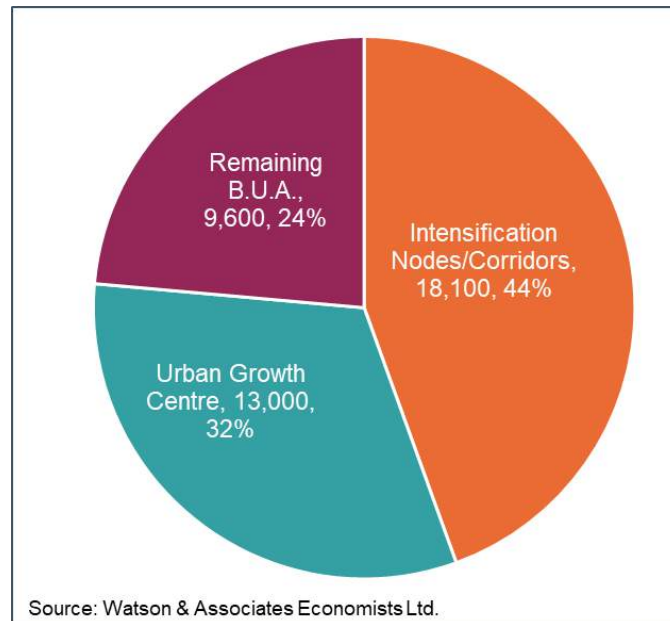


Figure 3-29
City of Barrie
Population Growth Forecast by Area within B.U.A.
2016 to 2041





3.8 City of Barrie Long-Term Housing Forecast to 2041

3.8.1 City-Wide Housing Forecast by Structure Type

By 2031 the City's housing base is forecast to increase to 80,700 households from approximately 52,500 in 2016. By 2041, the City's housing base is anticipated to reach approximately 100,000, an increase of 47,500 households. Figure 3-30 summarizes the City's housing growth forecast in five-year increments from 2016 to 2041. During the 25-year forecast period, the City is anticipated to average 1,900 new households per year (equal to 9,500 per five-year increment), which is considerably higher than the historical average over the 1991 to 2016 period (approximately 1,200 units annually).

Figure 3-30
City of Barrie
Average Annual Housing Growth – Historical and Forecast, 1991 to 2041

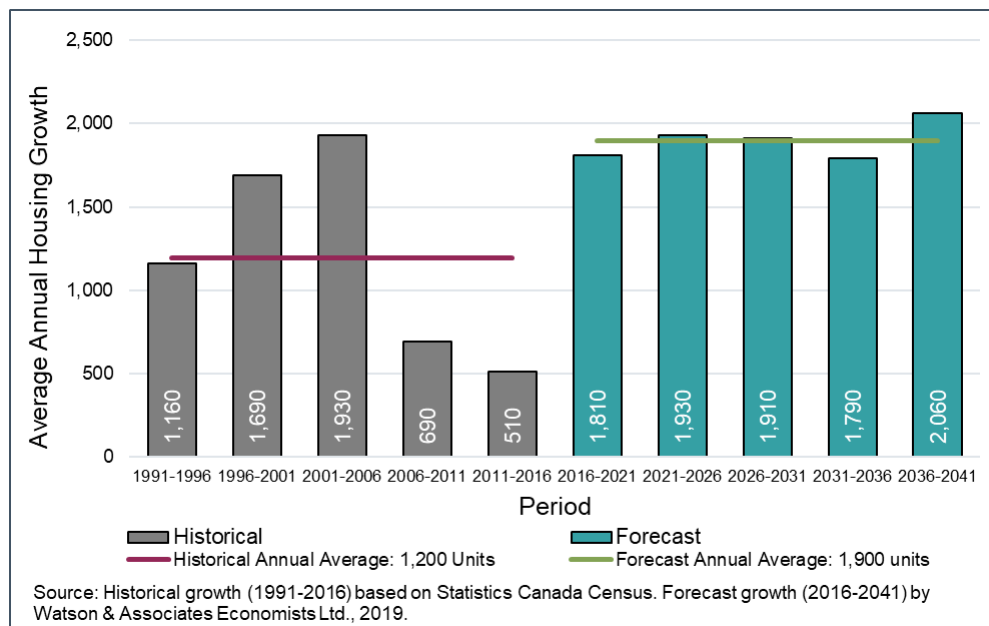


Figure 3-31 summarizes the City of Barrie housing forecast by structure type (i.e. low density, medium density and high density) over the 2016 to 2041 forecast period in five-year growth increments. Key observations include:

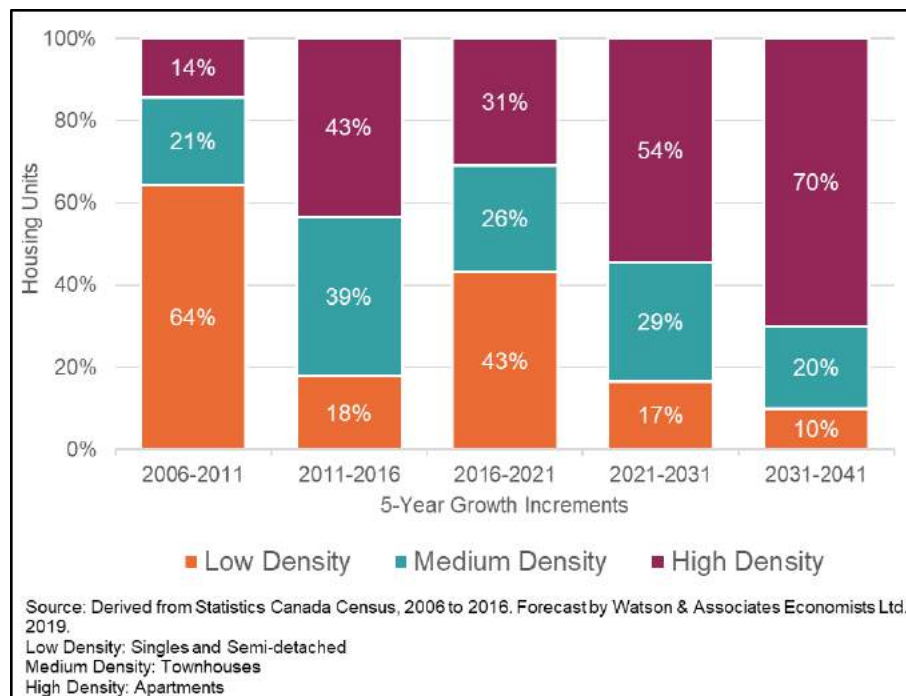
- In the short-term, new residential development within the City of Barrie is expected to be concentrated in low-density housing forms, largely driven by demand from families attracted to the Salem and Hewitt's Secondary Plan Areas;



- As previously discussed, housing preferences by structure type are anticipated to continue to shift from low-density to medium- and high-density housing forms over the long term. This shift is anticipated to be largely driven by the aging of the population and declining long-term housing affordability (particularly in the City’s rental housing market); and
- Over the 2016 to 2041 projection period, housing demand is forecast as follows by structure type:
 - 19% low-density housing;
 - 25% medium-density housing; and
 - 56% high-density housing.
- It is noted that this housing forecast represents a major shift compared to the City’s historical housing development trends. As discussed earlier in this chapter (section 3.6), the City has more than an adequate potential housing supply to accommodate this high-density housing demand.

Further details of the housing forecast by planning policy area are provided in Appendix A.

Figure 3-31
City of Barrie
Forecast Households by Structure Type





The demographic and socio-economic analysis provided in the 2018 City of Barrie Long-Term Growth Scenarios Review Report and throughout this report identify a number of trends which support a gradual to steady shift from low- to medium- and high-density housing over the next 20 years and beyond.

It is important to recognize that, net-migration will be a key driver of housing demand (both new and resale housing) over the next 20 years as a result of the aging of the local and regional population base. It is anticipated that a large component of net migration to Barrie will be driven by residents currently living elsewhere in Ontario, predominately elsewhere across the G.G.H. To a lesser extent, the City will also attract new residents from other Canadian provinces, as well as international migration. It is anticipated that the majority of all new residents migrating to Barrie will be within the 0-54 age group; however, new migrants are also expected in the 55-74 and 75+ age groups, given the City's attractiveness as a retirement destination and its access to Ontario's "cottage country."

Many of these new residents coming to Barrie in the 0-54 age category will seek ground-oriented housing options (i.e. low and medium density) to accommodate their existing and/or future families. The degree to which existing and new residents within this age group are accommodated in ground-oriented housing forms will be largely driven by available supply opportunities and affordability (i.e. household income vs. housing prices and associated carrying costs) of such homes relative to competing municipalities located in the surrounding regional market area.

As identified herein, average housing prices for new single-detached dwellings have steadily increased over the past decade, which has gradually eroded housing affordability. Over the next 20 years, it is anticipated that housing prices will continue to rise in Barrie. As housing prices continue to rise, it is foreseeable that a growing proportion of prospective home buyers in the City of Barrie will be accommodated in various forms of medium- and high-density housing (i.e. stacked townhouses, back-to-back townhouses, low-rise hybrid buildings, as well as low-, medium- and high-rise apartments).

As previously mentioned, a detail analysis of population growth by age was also carried out as part of the 2018 City of Barrie Long-Term Growth Scenarios Review. This analysis identifies that the City's population is steadily getting older. Over the 25-year planning horizon (2016 to 2041), growth in the 65+ age group is forecast to represent



28% of total population growth. By 2041, 20% of the City's population will be 65 years of age and older, up from 13% in 2016. Growth in the 65+ age group is anticipated to be strongest over the next 15 years, primarily due to the aging of the City's Baby Boom population (born between 1946 and 1964).

Housing needs associated with growth in the seniors' population base will be largely driven by the aging of existing Barrie residents and, to a lesser extent, net migration. It is important to recognize that not only is the City of Barrie's 65+ population age group relatively large and steadily growing, but it is also very diverse with respect to age, income, health, mobility and lifestyle/life stage. This is anticipated to drive the need for seniors' housing and other housing forms geared to an aging population (i.e. assisted living, affordable housing, adult lifestyle housing, etc.).

Within the seniors age group, the 75+ population is anticipated to experience the highest growth rate over the next 25 years. Generally, the physical and socio-economic characteristics of older seniors (i.e. 75+ age group) are considerably different than those of younger seniors, empty-nesters and working-age adults. On average, older seniors have less mobility, less disposable income and have relatively more health issues compared to younger seniors. Typically, these characteristics associated with older seniors drive relatively higher propensities for medium- and high-density housing forms which are in proximity to urban amenities (e.g. hospitals/health care facilities and other community facilities geared towards seniors).

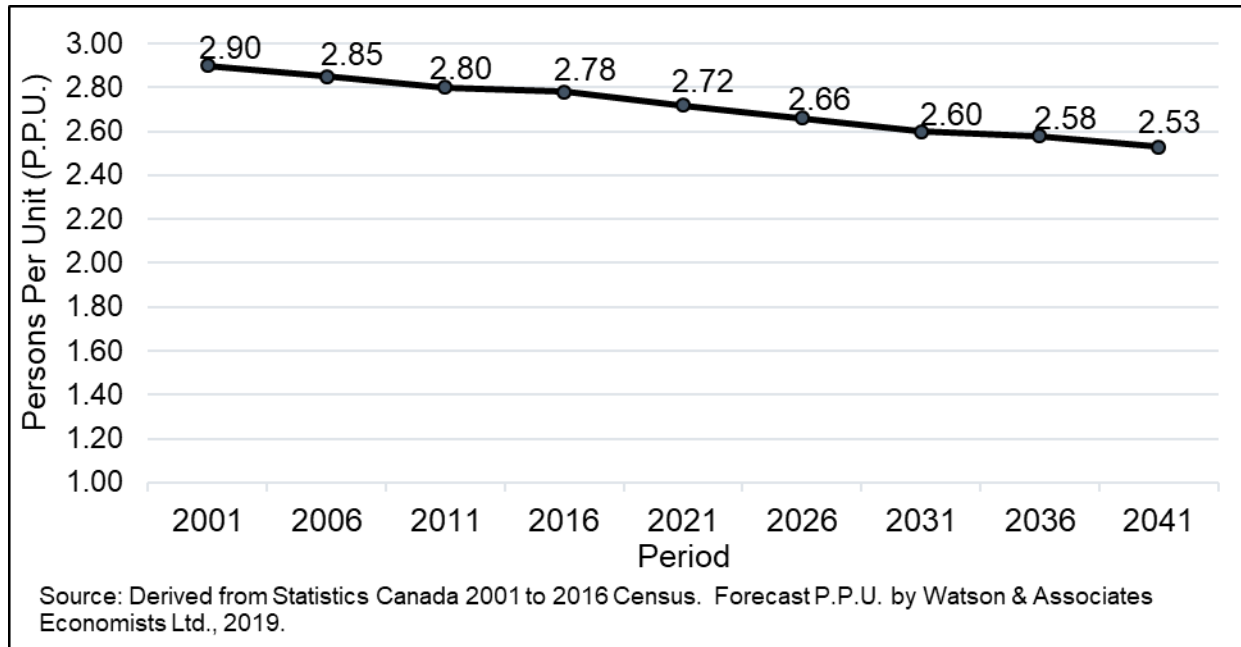
Despite the above-referenced demographic trends, it is important to recognize that Barrie's population base is anticipated to remain slightly younger than the provincial average, largely due to the City's strong population growth rate and attractiveness to families.

3.8.2 Long-Term Trends in Housing Occupancy

Figure 3-32 summarizes forecast trends in average housing occupancy, or persons per unit (P.P.U.), in accordance with the headship rate analysis previously discussed. Between 2016 and 2041, average P.P.U. levels in the City of Barrie are anticipated to steadily decline from 2.72 to 2.53. This decline is largely as a result of the aging of the City's population and the steady shift from ground-oriented to high-density housing forms.



Figure 3-32
City of Barrie
Forecast Average Persons Per Housing Unit (P.P.U.), 2016 to 2041



3.8.3 Housing Forecast by Planning Policy Area

Figures 3-33a and 3-33b summarize the City's housing forecast by B.U.A. and D.G.A.

Summary of City of Barrie Housing Growth by Planning Policy Area, 2016 to 2041

- The City of Barrie is forecast to add an additional 47,500 households to its housing base over the 2016 to 2041 period. Of this total, approximately 56% is forecast to be accommodated within the City's D.G.A. while the remaining 44% is expected to be accommodated within the City's B.U.A.
- As summarized in Figure 3-33b, the forecast rate of residential intensification (share of new housing units constructed within the B.U.A.) over the forecast horizon is anticipated to increase from 30% between 2016 and 2022, to 50% from 2031 to 2041. **Over the 2022 and 2041 period, the City is forecast to achieve a residential intensification rate of 47% which is close to the Growth Plan, 2019 target.**
- A large share of housing growth between 2016 and 2031, and to a lesser extent during the post-2031 period, is anticipated to be driven by residential demand within the Salem and Hewitt's Secondary Plan Areas.



- A large portion (17%) of housing growth in the City’s D.G.A is also anticipated to be accommodated in high-density developments within 500 metres of the Barrie South GO Station.¹ Forecast residential intensification surrounding the Barrie South GO Station is anticipated to be strongest during the post-2031 period. As previously mentioned, the Barrie South Go Station is located outside the City’s B.U.A., and does not contribute to the City’s residential intensification target.

Figure 3-32a
City of Barrie
Built Boundary and Greenfield Area
Housing Growth Forecast, 2016 to 2041

Period	Households		
	B.U.A.	Greenfield Area ²	Total Households
2016	49,450	3,020	52,470
2021	52,210	9,320	61,530
2031	60,560	20,150	80,710
2041	70,160	29,800	99,960
Growth Increment			
2016-2021	2,760	6,300	9,060
2021-2031	8,350	10,830	19,180
2031-2041	9,600	9,650	19,250
2016-2041	20,710	26,780	47,490

Source: Watson & Associates Economists Ltd.

¹Based on undercount of approximately 3%.

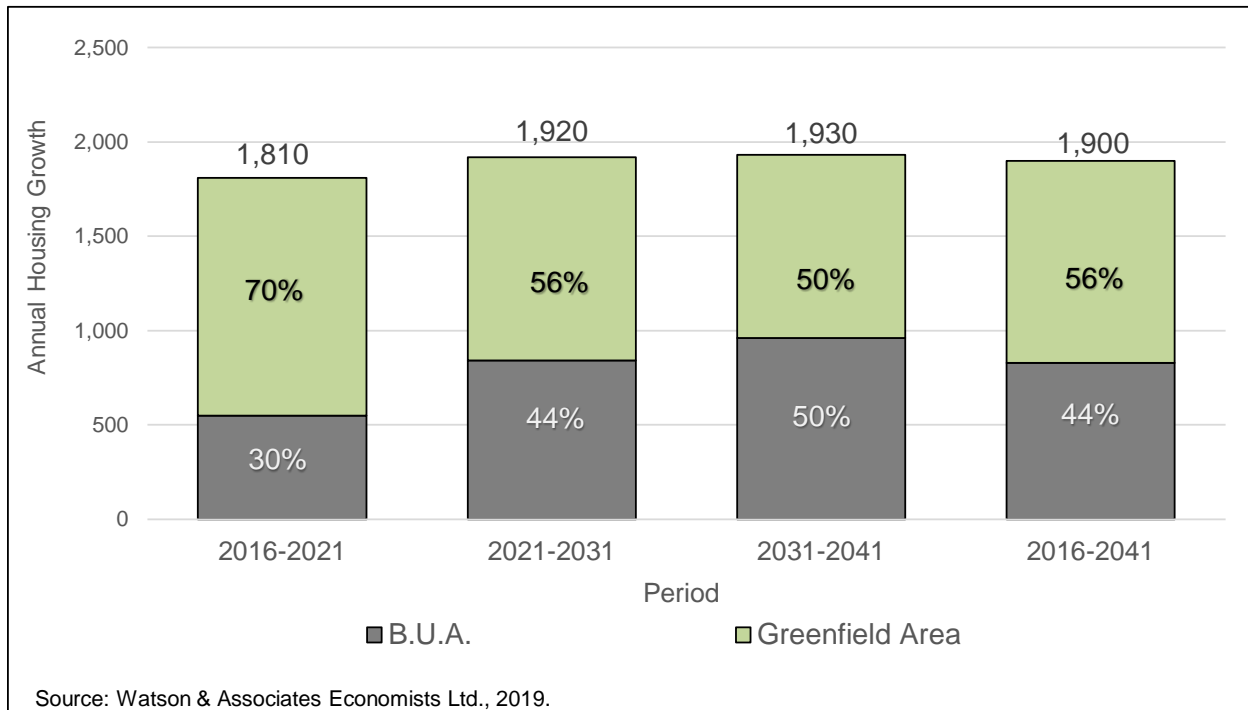
Figures may not add up precisely due to rounding.

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

¹ M.T.S.A. includes D.G.A. lands within the Salem and Hewitt’s Secondary Plan Area in addition to D.G.A. lands north of Mapleview Drive.



Figure 3-32b
City of Barrie
Built Boundary and Greenfield Area
Annual Housing Forecast to 2041



3.9 Conclusions

In recent decades, the City of Barrie has represented one of the faster growing municipalities in Canada. Over the next 25 years this strong rate of residential growth is anticipated to continue. Between 2016 and 2041, Barrie’s population base is forecast to increase by approximately 107,200 persons. To accommodate future population growth, the City is forecast to require approximately 47,500 new households between 2016 and 2041. As previously mentioned, the recommended population and housing forecast was developed based on the results of the 2018 City of Barrie Long-Term Growth Scenarios Review Study (Scenario 3 – Made in Barrie).

To accommodate this population forecast, a high rate of future housing development is anticipated within both the City’s B.U.A. and its D.G.A. over the longer term planning horizon. Collectively, the level of average annual housing growth projected across the City over the next 25 years is anticipated to be comparable to levels the City experienced during the 2001 to 2006 period; approximately 1,900 new households per



year. The City's housing analysis, presented herein, represents a transformative long-term vision which recognizes that, as the City continues to mature and urbanize, future needs will continue to evolve and diversify by built-form and density along with the City's diversifying population base.

It is important to recognize that the forecast mix of high-density housing growth summarized in this report does not represent a status quo scenario. Achieving the targeted percentage of forecast high-density housing for the City of Barrie 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. The City will also need to consider policies that appropriately accommodate development between the B.U.A., the D.G.A. and future designated greenfield areas (F.D.G.A.) to ensure that greenfield development is phased in a manner that does not undermine the City's long-term housing intensification objectives.

Policies and Tools will be Required to Support a Shift in Higher Density Housing

The forecast mix of high-density housing growth summarized in this report does not represent a status quo scenario.



Chapter 4

Intensification Strategy



4. Intensification Strategy

4.1 Introduction

The Growth Plan, 2019 establishes an “intensification first” approach to development and community building. This approach requires municipalities to first demonstrate that they are optimizing existing urban land, infrastructure and public service facilities, before they expand existing urban areas to accommodate future population and employment growth.

The City of Barrie prepared its first residential Intensification Strategy in 2009 in response to the 2006 Growth Plan. The guiding principles of this report inform the City’s O.P. policies with respect to residential development and housing density within intensification nodes and corridors, major transit nodes, and secondary nodes and corridors. In 2011, an updated residential intensification assessment was subsequently prepared for the City as part of the Phase 2 City of Barrie Growth Management Strategy (G.M.S.).

The 2011 intensification study identified that the majority of the City’s residential intensification sites with high potential would be absorbed by the 2031 period, with only a small share of remaining sites with low to moderate potential remaining. Further, the study concluded that the City is anticipated to accommodate 756 units annually within the B.U.A. over the 2015 to 2031 period and, as a result, the City is expected to meet its 40% intensification requirement established in the 2006 Growth Plan.

Within the context of the revised residential intensification targets introduced in the Growth Plan, 2019, the City’s Intensification Strategy has been re-examined based on the following key components:

- A review of the policy direction of the Growth Plan, 2019 and the City’s O.P. to understand where intensification should be directed;
- An updated assessment of the City’s intensification potential;
- Delineation and analysis of the City’s two Major Transit Station Areas (M.T.S.A.s);



- Forecast housing and population growth by 2041 within the City’s remaining strategic growth areas;¹ and
- A revised residential intensification target for the City to the year 2041.

4.1.1 Defining Residential Intensification

The term *intensification* is used in a number of different ways. It is important as a basis for this assessment that a common understanding of the term and related terminology be established.

A range of different terms is used to describe intensification, in particular “redevelopment” and “infill.” The City, however, is required to be consistent with the Provincial Policy Statement (P.P.S.) and to conform to the Growth Plan. The definitions in those two documents, therefore, take precedence over any others.

Both policy documents define intensification, redevelopment and brownfield sites as follows:

“Intensification

The development of a property, site or area at a higher density than currently exists through:

- a. redevelopment, including the reuse of brownfield sites;
- b. the development of vacant and/or underutilized lots within previously developed areas;
- c. infill development; or
- d. the expansion or conversion of existing buildings.”

“Redevelopment

The creation of new units, uses or lots on previously developed land in existing communities, including brownfield sites.”

“Brownfield Sites

¹ Refer to Figure 4-1 herein.



Undeveloped or previously developed properties that may be contaminated. They are usually, but not exclusively, former industrial or commercial properties that may be underutilized, derelict or vacant.”

The Growth Plan has identified areas of focus for intensification, these areas are referred to as Strategic Growth Areas and are defined as:

“Strategic growth areas

Within settlement areas, nodes, corridors, and other areas that have been identified by municipalities or the Province to be the focus for accommodating intensification and higher-density mixed uses in a more compact built form. Strategic growth areas include urban growth centres, major transit station areas, and other major opportunities that may include infill, redevelopment, brownfield sites, the expansion or conversion of existing buildings, or greyfields. Lands along major roads, arterials, or other areas with existing or planned frequent transit service or higher order transit corridors may also be identified as strategic growth areas.”

4.1.2 What are the Provincial Intensification Targets in Accordance with the Growth Plan, 2019?

With respect to residential intensification requirements, sections 2.2.2.1 through 2.2.2.3 of the Growth Plan, 2019 state:

“By the time the next municipal comprehensive review is approved and in effect, and for each year thereafter, the applicable minimum intensification target is as follows:

- a) Minimum of 50 per cent of all residential development occurring annually within each of the Cities of Barrie, Brantford, Guelph, Hamilton, Orillia and Peterborough and the Regions of Durham, Halton, Niagara, Peel, Waterloo and York will be within the delineated built-up area; and
- b) The City of Kawartha Lakes and the Counties of Brant, Dufferin, Haldimand, Northumberland, Peterborough, Simcoe and Wellington will, through the next municipal comprehensive review, each establish the minimum percentage of all residential development occurring annually that will be within the delineated built-up area, based on maintaining or improving upon the minimum intensification target contained in the applicable upper- or single-tier official plan.

Until the next municipal comprehensive review is approved and in effect, the annual minimum intensification target contained in the applicable



upper- or single-tier official plan that is approved and in effect as of July 1, 2017 will continue to apply.”

Section 2.2.2.4 of the Growth Plan, 2019 allows for Councils within upper- and single-tier municipalities to request an alternative to the target established in policy 2.2.2.2 through the next M.C.R., where it has been demonstrated that the target cannot be achieved and that the alternative target meets all other requirements of the Plan.

4.1.3 City of Barrie Strategic Growth Areas

Figure 4-1 summarizes the City’s strategic growth areas. These locations reflect key areas to direct intensification within the City of Barrie. Figure 4-2, geographically illustrates the location of the City’s strategic growth areas. As summarized, the City of Barrie’s urban structure includes three types of strategic growth areas: the U.G.C., intensification nodes and corridors, and M.T.S.A.s.¹ It is important to note that the City’s Allandale Waterfront M.T.S.A. partially overlaps with the U.G.C., while the City’s South Barrie M.T.S.A. partially overlaps within the City’s intensification nodes and corridors. Further, the South Barrie M.T.S.A. and a portion of the intensification nodes and corridors are located within the City’s D.G.A. and any growth within these areas does not contribute towards the City’s intensification target in accordance with the Growth Plan. The City of Barrie’s strategic growth areas will not only serve to direct growth within the B.U.A., but will increase densities within the D.G.A. As previously discussed, the City of Barrie does not have a transit station area on a priority transit corridor and therefore its M.T.S.A.s are not subject to the Growth Plan, 2019 target. Density targets for the M.T.S.A.s within the City of Barrie should be reviewed within the local context.

¹ The delineation of the M.T.S.A. is discussed in section 4.3.



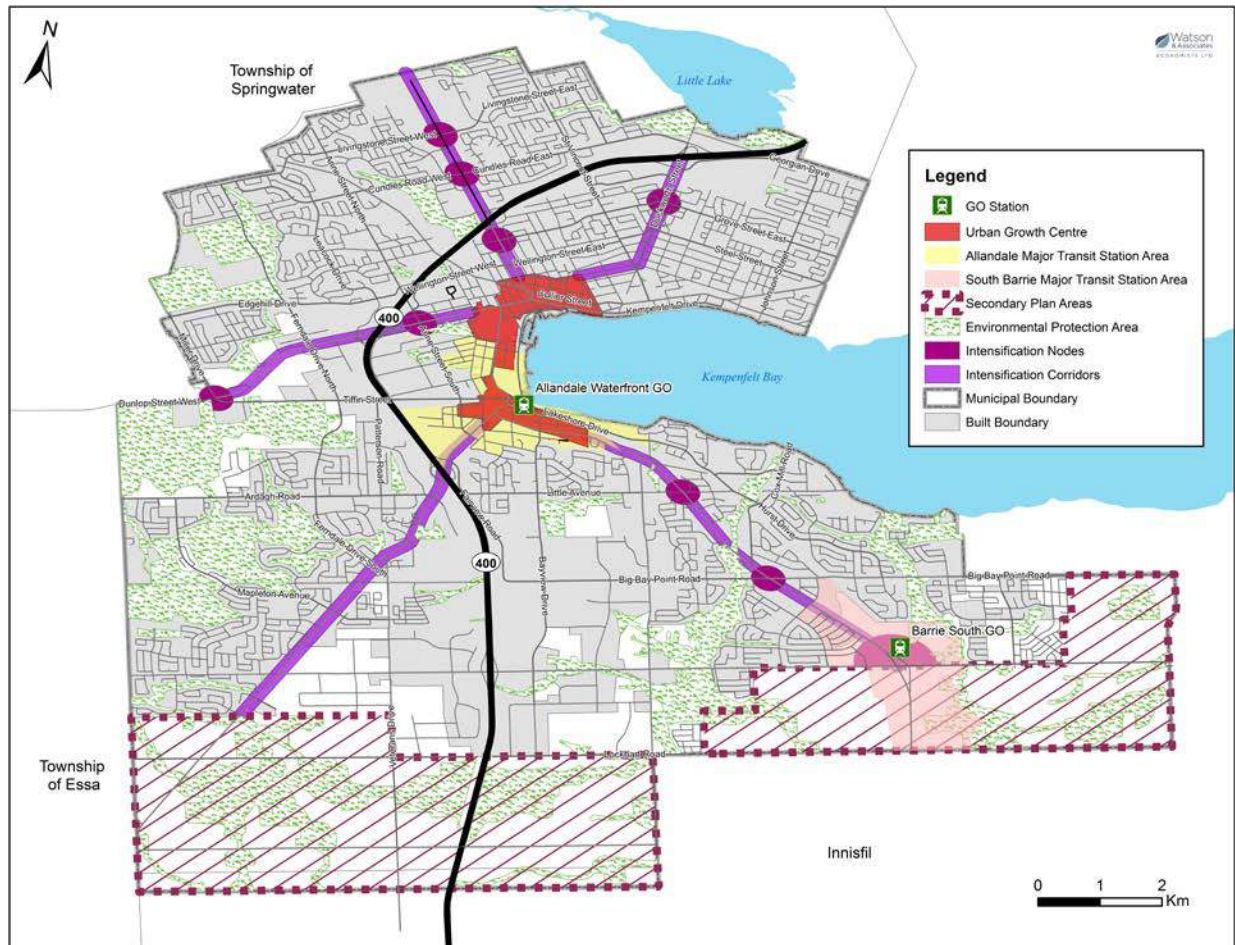
Figure 4-1
City of Barrie
Strategic Growth Areas

Strategic Growth Areas	Location	Targets	Notes
Urban Growth Centre (U.G.C.)	Built-up Area (B.U.A.)	Growth Plan, 2019: 150 residents and jobs/ha by 2031 or earlier.	- Large portion of M.T.S.A. overlaps with U.G.C.
Intensification Nodes and Corridors	Built-up Area (B.U.A.)/ Designated Greenfield Area (D.G.A.)	Official Plan: Intensification Node - 50 to 120 units/ha; Intensification Corridor - 50 units/ha; and Major Transit Node 50 to 120 units/ha.	- Some areas are within the D.G.A. and do not count towards achieving the City's intensification target. - Portion of M.T.S.A. within the City's intensification nodes and corridors.
Major Transit Station Areas (M.T.S.A.s):			
Allandale M.T.S.A.	Built-up Area (B.U.A.)	Growth Plan: The City of Barrie does not have a station on the identified priority transit line (Schedule 5 of the Growth Plan, 2019), therefore can consider a local target.	- Large portion of M.T.S.A. overlaps with U.G.C.
Barrie South M.T.S.A.	Designated Greenfield Area (D.G.A.)	Growth Plan: The City of Barrie does not have a station on the identified priority transit line (Schedule 5 of the Growth Plan, 2019), therefore can consider a local target.	- A portion of growth within this M.T.S.A. does not count towards achieving the City's intensification target. - Portion of M.T.S.A. within the City's intensification nodes and corridors.

Source: Watson & Associates Economists Ltd., 2019



Figure 4-2
City of Barrie
Urban Structure and Strategic Growth Areas





4.2 Results of City of Barrie Growth Scenarios Review Regarding Residential Intensification

As previously mentioned, in October 2018 the City of Barrie completed a Long-Term Growth Scenarios Review for the City of Barrie. This study concluded that within the City's built boundary the City could accommodate:

- 33% of new households over the 2015 to 2022 period (Growth Plan target: 40%);
- 44% of new households over the 2022 to 2031 period (Growth Plan target: 60%);¹
- 47% of new households over the 2031 to 2041 period (Growth Plan target: 60%); and
- 46% of new households over the 2022 to 2041 period (Growth Plan target: 60%).

As background to this M.C.R., the City has conducted a more detailed review of short-, medium- and long-term residential intensification supply opportunities, including the City's M.T.S.A.s,² U.G.C, other strategic growth areas and remaining lands within the City's B.U.A. The results of this review have been summarized herein. Based on further review of intensification opportunities within the B.U.A., the intensification targets for the City of Barrie have been upwardly adjusted during the 2031 to 2041 period from 47% to 50%. This results in an overall increase to the City's 2022 to 2041 residential intensification target from 46% to 47%, which is slightly below the housing intensification target of the Growth Plan, 2019.

¹ 40% of new households over the 2015 to 2031 period (Growth Plan target: 60%).

² It is noted that the South Barrie GO Station is located outside the City's B.U.A.



4.3 Housing Supply Opportunities Within the City of Barrie Built-Up Area

4.3.1 Total Housing Intensification Supply

As part of this O.P. review and M.C.R., the City has undertaken an in-depth assessment of intensification opportunities within the City's B.U.A and has prepared an updated list of candidate sites for residential intensification within the following areas:

- U.G.C.;
- Intensification nodes and corridors; and
- Other areas within the built boundary.

The results of the intensification supply capacity analysis within the B.U.A. is summarized in Figures 4-3a through 4-6. Figure 4-3a provides a map of the identified intensification opportunities within the City's B.U.A, while Figure 4-3b provides a detailed map of intensification opportunities within the City's U.G.C. Figures 4-4 and 4-5 provide tabular data summarizing the range of potential housing unit yield associated with intensification sites by location.

As summarized in Figure 4-4, the City has identified approximately 284 potential intensification sites with the potential to accommodate a range of 19,700 to 38,400 housing units. Large intensification sites representing development/redevelopment opportunities with the capacity to accommodate 100-plus units comprise just over a quarter of the identified intensification sites. Figure 4-5 provides a summary of the potential by housing unit type. In accordance with the high-range scenario, residential intensification potential is premised upon a housing mix of 2% low-density (singles & semi-detached), 24% medium-density (townhouses) and 74% high-density (apartments) units.

City of Barrie Potential Housing Opportunities Accommodated through Intensification

284 potential intensification sites with the potential to accommodate a range of 19,700 to 38,400 housing units.

Residential and non-residential development opportunities surrounding the Allandale Waterfront GO Station and the Barrie South GO Station are discussed in further detail in section 4.4. It is important to reaffirm that the intensification opportunities within the



City's D.G.A., which includes the Barrie South GO Station, do not contribute towards the City's intensification target in accordance with the Growth Plan. As summarized in Figure 4-6, the Barrie South GO Station lands have the potential to accommodate up to 4,700 housing units.

Figure 4-3a
City of Barrie
Residential Intensification and Redevelopment Opportunities

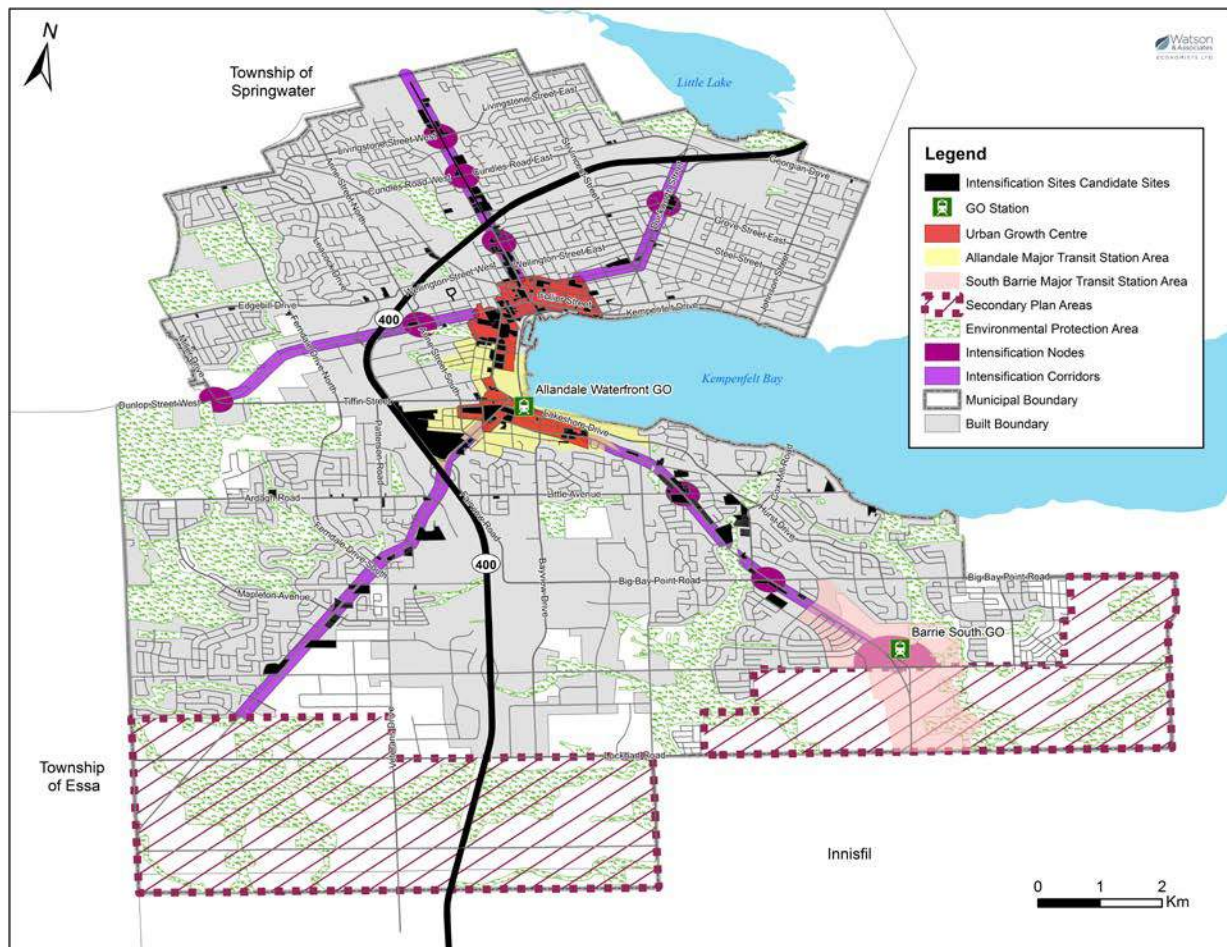




Figure 4-3b
City of Barrie
Residential Intensification and Redevelopment Opportunities within the U.G.C.

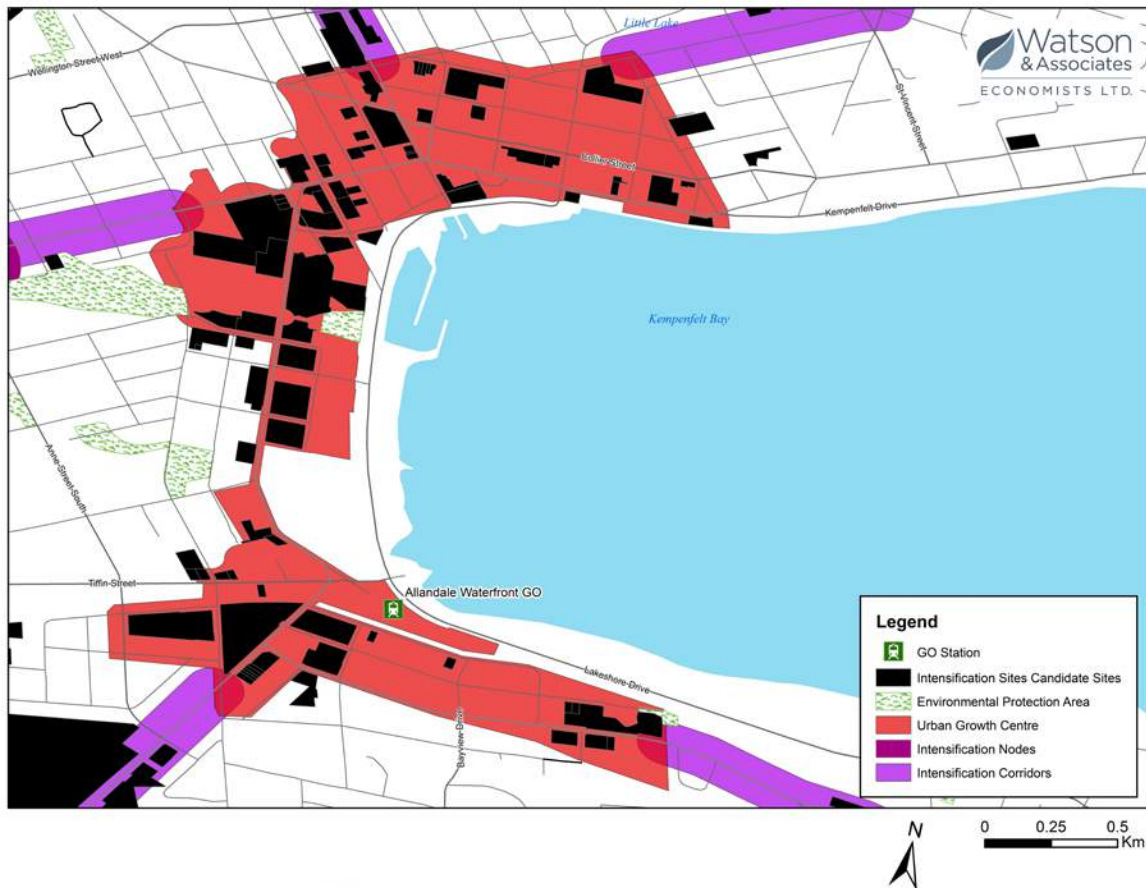




Figure 4-4
City of Barrie
Summary of Potential Intensification Sites

Location	Unit Range		# of Sites	
	Low Range	High Range	Total Sites	# of Sites: Potential to Accommodate 100 units+ ¹
Urban Growth Centre Area	7,287	11,710	82	23
Intensification Corridor Area	7,941	16,835	133	42
Arterial Road Area	3,704	8,165	31	3
Minor & Major Collector Area	760	1,725	38	2
Total	19,692	38,435	284	70
%				25%

Source: Summarized by Watson & Associates Economists Ltd. based on intensification inventory data provided by the City of Barrie.

¹Based on higher-end range of intensification potential.

Figure 4-5
City of Barrie
Summary of Potential Intensification Sites

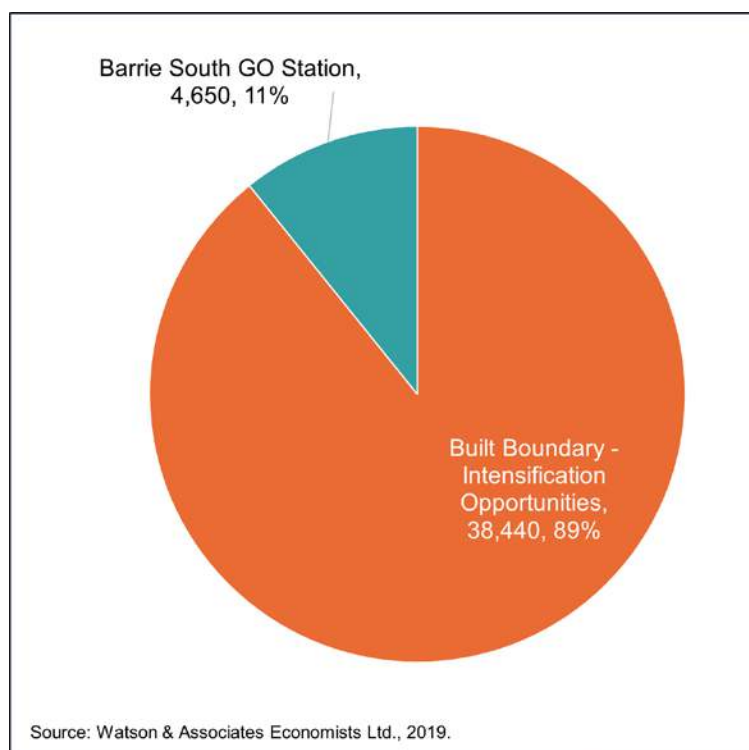
Location	Low Range				High Range				%
	Low Density	Medium Density	High Density	Total Units	Low Density	Medium Density	High Density	Total Units	
Urban Growth Centre Area	14	374	6,899	7,287	34	831	10,845	11,710	30%
Intensification Corridor Area	183	492	7,266	7,941	457	1,035	15,343	16,835	44%
Arterial Road Area	36	3,222	446	3,704	83	7,102	980	8,165	21%
Minor & Major Collector Area	76	175	509	760	185	387	1,153	1,725	4%
Total	309	4,263	15,119	19,692	759	9,355	28,321	38,435	100%
%	2%	22%	77%	100%	2%	24%	74%	100%	

Source: Summarized by Watson & Associates Economists Ltd. based on intensification inventory data provided by the City of Barrie.



As previously discussed, the City has the potential to accommodate up to approximately 38,400 housing units through intensification within the built boundary. In addition, the City has the potential for up to approximately 4,700 housing units within lands surrounding the Barrie South GO Station in the City's D.G.A. In total, the City can accommodate up to 43,100 housing units through intensification including the Barrie South GO Station.

Figure 4-6
City of Barrie
Summary of Total Intensification Potential



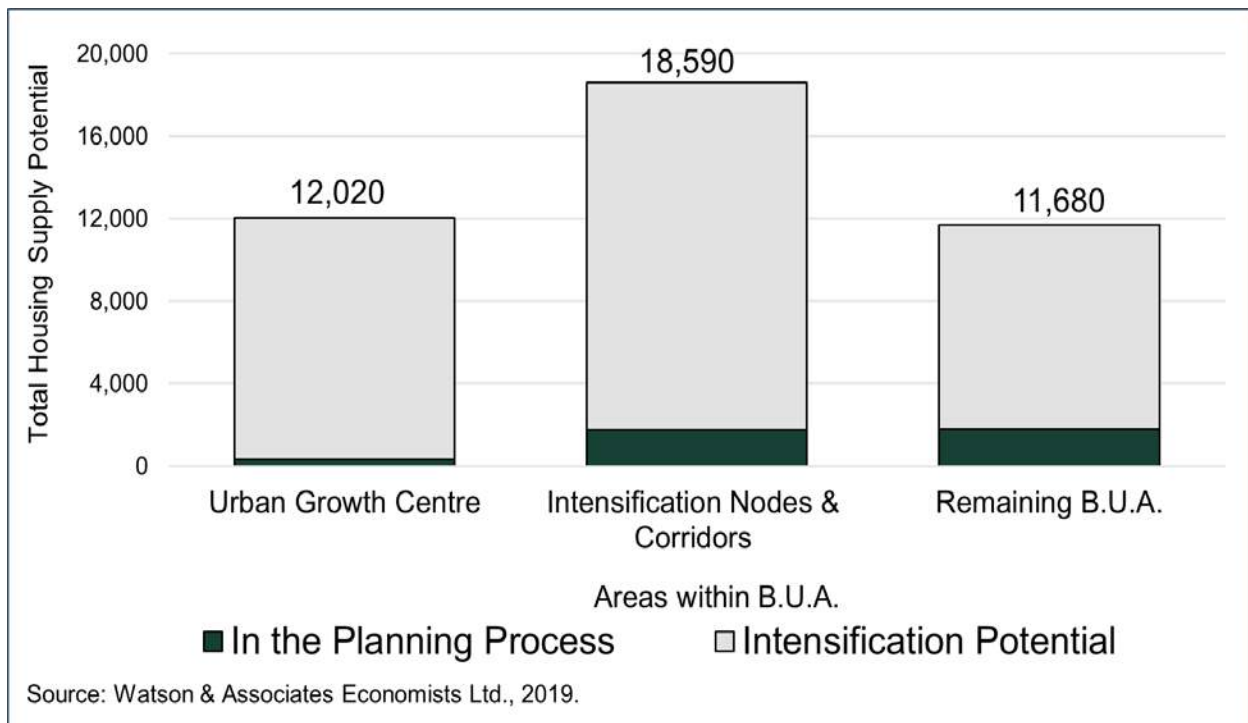
4.3.2 Total Housing Supply Potential within the Built Boundary and Strategic Growth Areas

The City's B.U.A can accommodate between 23,600 and 42,300 housing units depending on the unit yield assumptions on identified intensification sites, including housing units identified in active planning applications within the City's B.U.A. A large portion of the City's housing supply opportunities within the B.U.A. are based on housing intensification opportunities that are not currently proposed or approved by the City. Approximately 9% to 16% of the potential housing units within the B.U.A. are



based on approved and proposed developments within the planning process. As summarized in Figure 4-7, the City's intensification nodes and corridors can accommodate up to 18,600 units, approximately 44% of the total housing potential within the B.U.A. The U.G.C. can accommodate up to 12,000 units, representing approximately 28% of the housing potential within the B.U.A. The remaining B.U.A. outside the Strategic Growth Areas, can accommodate up to 11,700 units, representing approximately 28% of the housing potential within the B.U.A.

Figure 4-7
City of Barrie
B.U.A.
Summary of Total Housing Supply Potential
Based on High Range Intensification Potential



4.3.3 Opportunities for Second Units

Opportunities to accommodate future housing growth through second suites is an important consideration. The Strong Communities through Affordable Housing Act, 2011, which made a number of amendments to the Planning Act, emphasizes to decision-makers that affordable housing is a key priority for the Province. In accordance with the Act, municipalities are required to establish O.P. policies and



zoning by-law provisions allowing second units in detached, semi-detached and row houses, as well as in ancillary structures. Barrie's mature neighbourhoods are characterized by a significant share of low-density housing, conducive to the development of second suites. Second suites offer an effective means to achieve intensification. Over the forecast horizon, it is assumed that the City's D.G.A. will also provide opportunities for second suites. In accordance with historical demand and identified supply opportunities, approximately 40 new secondary-suite units are anticipated to be created annually within the City and approximately 80% of these housing units will be located within the City's B.U.A.

Opportunities to Accommodate Second Suites

In accordance with historical demand and identified supply opportunities, 40 new secondary-suite are anticipated to be created annually within the City.

4.4 Major Transit Station (M.T.S.A.) Analysis

M.T.S.A.s are areas around transit stations that are strategic growth areas and area planned to achieve minimum density targets set out by the Growth Plan. Generally, an M.T.S.A. is an area within an approximate 500 to 800 metres of a transit station, representing about a 10-minute walk. The City of Barrie does not have any station areas on a priority transit line, as identified in Schedule 5 of the Growth Plan, 2019, and therefore is required to set a local target. The City of Barrie has two GO Transit stations; Allandale Waterfront and Barrie South which are discussed in detail below.

4.4.1 M.T.S.A. Approach

The M.T.S.A. analysis provided herein has been carried out based on the following:

- Delineation of the M.T.S.A. boundaries that are generally within a 500- to 800-metre radius of the transit station in accordance with the City's established traffic zones.
- An estimation of existing population and employment within the M.T.S.A.;
- Identification of the following areas within the M.T.S.A. with a spatial analysis of the proportion and total quantum of land:
 - Non-developable areas (e.g. Natural Heritage System);
 - Areas likely to remain largely stable (e.g. residential areas);



- Areas where the potential for redevelopment is considered to be limited within the Growth Plan horizon (i.e. by 2041); and
- Areas with intensification potential (e.g. vacant lots, redevelopment sites);
- Identification of historical development trends within the M.T.S.A.s;
- Forecast development potential based on O.P. designations and market demand over the forecast horizon;
- Determination of population and employment based on theoretical maximum development at a mature state; and
- The setting of an appropriate density target by 2041 and ultimate buildout.

4.4.2 Allandale Waterfront GO Station

4.4.2.1 Description of the Site and Current Transit Services

The Allandale Waterfront GO Station site includes the GO train station building, as well as historical train station buildings. The site is approximately 2.6 ha (6.4 acres) and includes approximately 160 parking spaces. The GO train station is accessed via Gowan Street, a local residential street, as well as Lakeshore Drive, an arterial road. Generally, the narrow setback of the GO train station to the road offers opportunities for pedestrian travel.

The GO train station has weekday and weekend commuter GO train service consisting of seven trains southbound to Toronto Union Station in the morning, and seven trains returning northbound from Toronto Union Station in the afternoon. In addition, the train station offers GO bus service and City of Barrie transit bus services.



Figure 4-8
City of Barrie
Allandale Waterfront GO Station Site



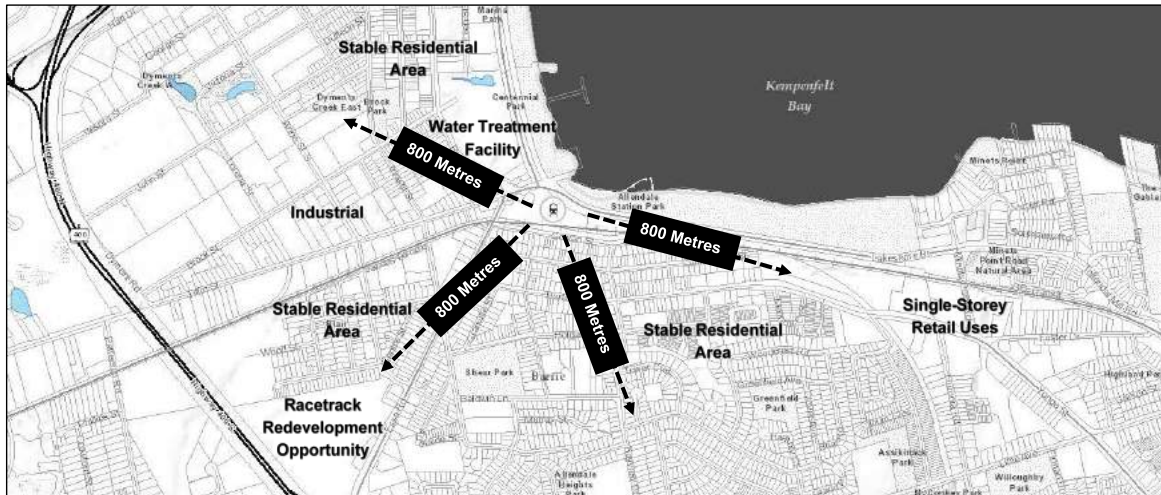
Source: Adapted from Google Earth Imagery by Watson & Associates Economists Ltd.

4.4.2.2 Description of the Surrounding Area

The Allandale Waterfront GO Station is located south of the City's downtown area and is situated within the City's U.G.C. It is important to note that there is significant overlap with the M.T.S.A. and the U.G.C. It is estimated that just under one-third (28%) of the delineated land area is within the City's U.G.C. Stable low-density residential neighbourhoods surround the Allandale Waterfront GO Station to the south and west. To the north of the station is a large municipal water treatment facility, and to the east is a waterfront park and Kempenfelt Bay. Beyond the immediate area, there are mature industrial uses to the northwest and towards Highway 400 to the west.



Figure 4-9
City of Barrie
Area Surrounding the Allandale Waterfront GO Station



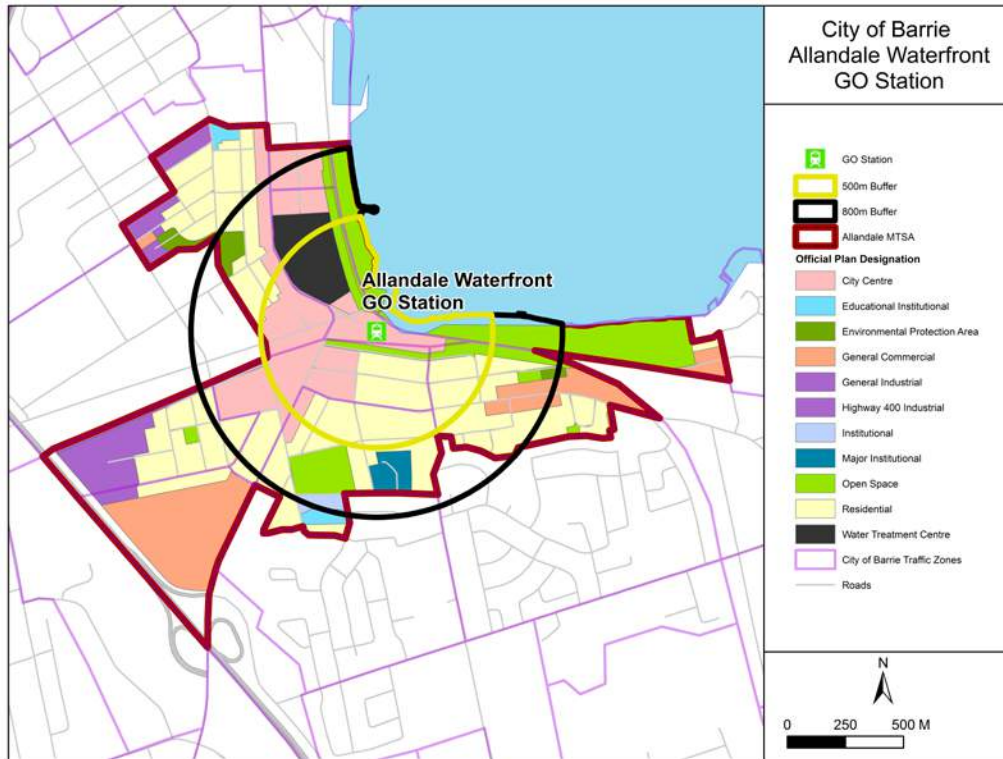
Source: Base mapping adapted from County of Simcoe, Online Mapping by Watson & Associates Economists Ltd.

4.4.2.3 Delineated Major Transit Station Area

As illustrated in Figure 4-10, the delineation of the M.T.S.A. is based on the City's traffic zones that are within a 500- to 800-metre buffer, with the exception of the western portion of the M.T.S.A. which extends slightly beyond an 800-metre buffer. The broader delineation allows for the opportunity to include a wider range of land uses and to include a potential major redevelopment site (former racetrack site). The land area of the M.T.S.A. is approximately 226 gross ha (558 gross acres), net of environmental features (identified in the City's Official Plan as Environmental Protection Area), as summarized in Figure 4-11. The area predominately includes lands designated for residential uses, open space and City Centre uses, as summarized in Figure 4-12.



Figure 4-10
City of Barrie
Delineation of the Allandale Waterfront GO Station



Source: Watson & Associates Economists Ltd.

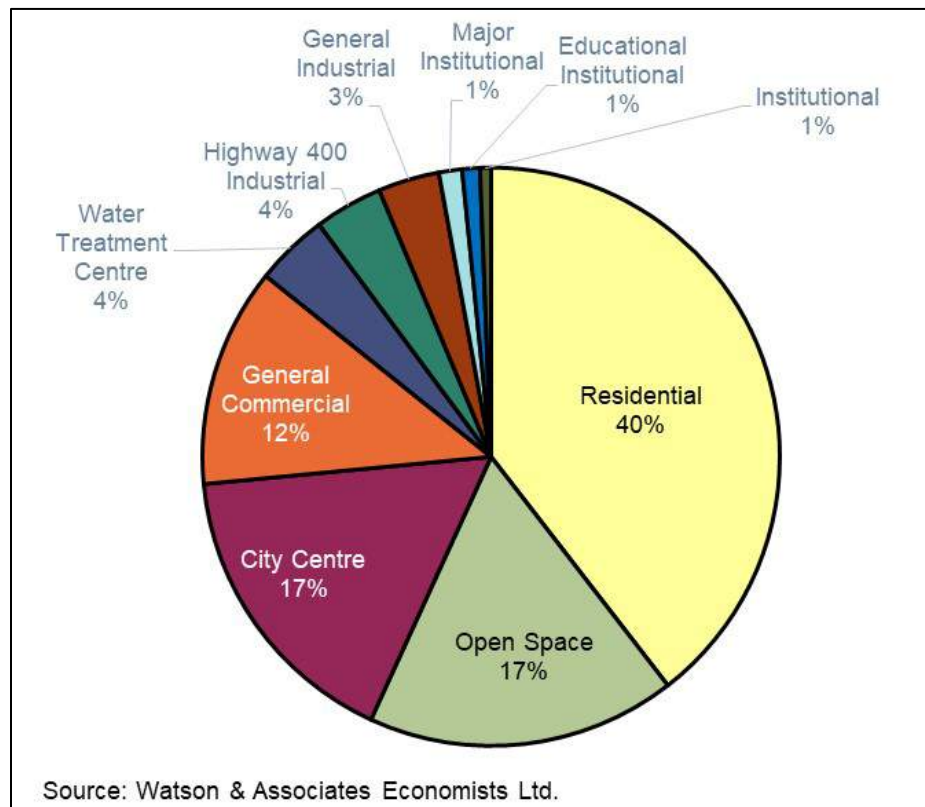
Figure 4-11
City of Barrie
Allandale Waterfront M.T.S.A., Gross Land Area (ha)

Delineated Allandale Waterfront Major Transit Station Area	Land Area (ha)
Gross Land Area	230
Environmental Features	4
Gross Land Area, Net of Environmental Features	226

Source: Watson & Associates Economists Ltd.



Figure 4-12
City of Barrie
Allandale Waterfront M.T.S.A. by Designated Land Uses,
Gross Land Area (ha)



4.4.2.4 Existing Population, Employment and Density, 2019

As summarized in Figure 4-13, the M.T.S.A. has an estimated population base of 4,100 persons and an employment base of approximately 3,600 jobs. Development activity has been minimal within the M.T.S.A. over the past 10 years and, as a result, population and employment have remained unchanged since 2016. Based on a gross land area of 226 ha (558 acres) and a combined population and employment estimate of 7,700, the M.T.S.A. has a density of 34 people and jobs per gross ha. The existing density is very low due to a combination of factors, including:

- The average density of the surrounding residential neighbourhoods is low, at 46 people per ha;
- A large portion of the M.T.S.A. is comprised of open space, representing 17% of the land area;



- The City’s Municipal Water Treatment Centre is located on a parcel of approximately 9 ha (22 acres); and
- The area includes a large underutilized portion of the transit station (approximately 2 ha/5 acres).

Figure 4-13
City of Barrie
Allandale Waterfront M.T.S.A.
Population and Employment Density, 2019

Delineated Allandale Waterfront Major Transit Station Area	2019
Population	4,100
Residential Land Area, Gross ha ¹	89
Population Density (population/ha)	46
Employment	3,600
Population and Employment	7,700
Land Area, Gross ha ¹	226
Population and Employment Density (people and jobs/ha)	34

Source: Watson & Associates Economists Ltd. based on background work prepared for the City of Barrie Long-Term Growth Scenarios Review, October 26, 2018.

¹Excludes environmental features.

4.4.2.5 Residential Intensification and Redevelopment Opportunities

Figure 4-14a illustrates the location of residential intensification and redevelopment opportunities within the M.T.S.A. Figure 4-14b provides a summary of the potential for intensification within the M.T.S.A. based on a review of residential development applications in the approvals process (site plans and subdivisions under review or approved) and opportunities for residential infill and redevelopment. As part of the



broader review of intensification opportunities in the City, prepared by the City of Barrie, there is the potential to accommodate 8,340 units within the M.T.S.A. through redevelopment and infill of existing neighbourhoods. In total, the M.T.S.A. has the potential to accommodate an additional 8,340 units, representing a gross population of 21,500. It is important to note that this area includes a number of mature commercial and industrial sites, offering opportunities for redevelopment.

Figure 4-14a
City of Barrie
Allandale Waterfront M.T.S.A.
Residential Intensification and Redevelopment Opportunities

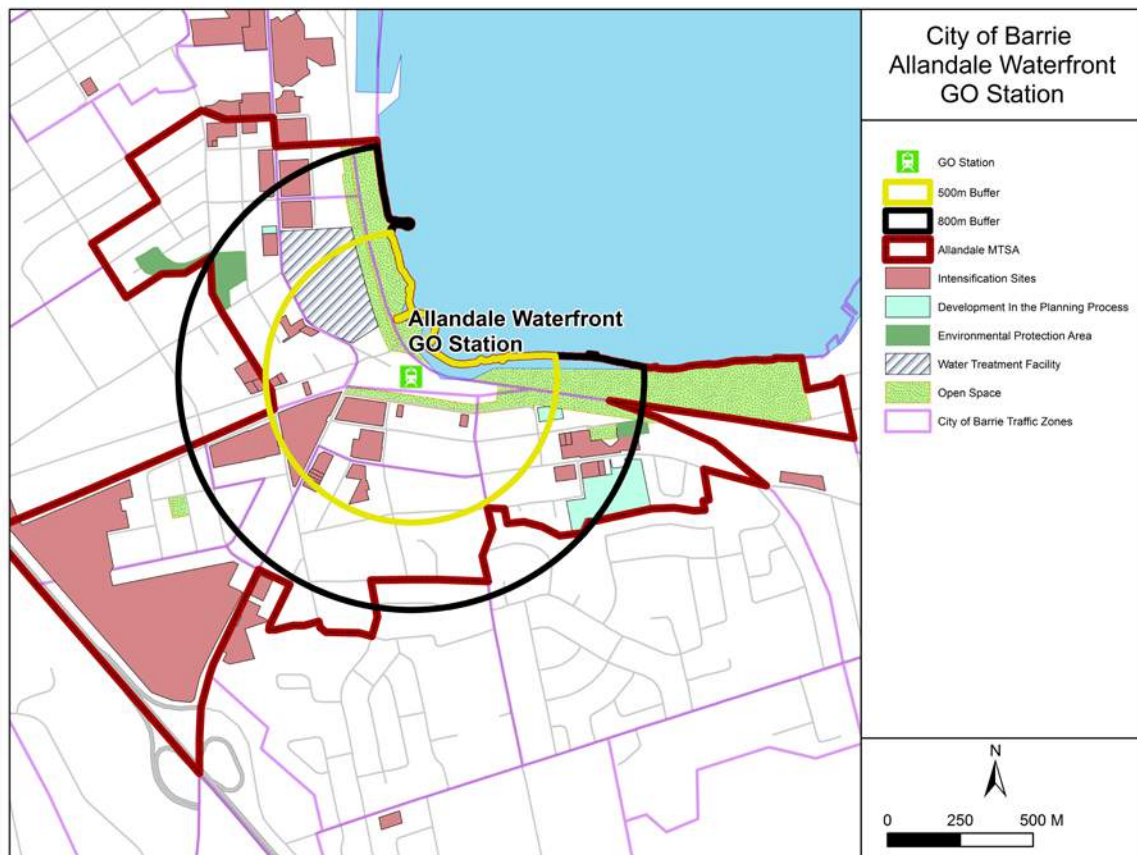




Figure 4-14b
City of Barrie
Allandale Waterfront M.T.S.A.
Residential Intensification and Redevelopment Opportunities

Type of Residential Intensification Opportunity	Housing Units ¹				Estimated Gross Population ²
	Low Density	Medium Density	High Density	Total Units	
In the Planning Process: Subdivision Plans and Site Plans	0	116	30	146	360
Neighbourhood Infill Opportunities	2	24	0	26	70
Redevelopment and Other Intensification Opportunities	34	7,529	604	8,167	21,090
Total Housing Potential	36	7,669	634	8,339	21,520

Source: Derived from data obtained from the City of Barrie, January 2019.

Note: Estimates are based on higher-end housing unit estimates prepared by the City of Barrie.

¹Low density: singles & semi-detached; medium density: townhouses; and high density: apartments.

²Gross population estimates based on persons per unit (P.P.U.): low density of 3.248; medium density of 2.571 and high density of 1.669. Population includes a 3% undercount.

As summarized in Figure 4-15, in order for the Allandale Waterfront M.T.S.A. to reach 150 people and jobs per gross ha, the M.T.S.A. would need to add 26,660 people and jobs, which is greater than the identified intensification capacity. Achieving 150 people and jobs per gross ha in the Allandale Waterfront M.T.S.A. would require a significant transformation of this area.

Figure 4-15
City of Barrie
Allandale Waterfront M.T.S.A.
Theoretical Buildout Based on 150 People and Jobs/ha

Delineated Allandale Waterfront Major Transit Station	2019	Buildout	2019-Buildout	% Increase
Population and Employment ¹	7,700	33,920	26,220	341%
Land Area, Gross ha ²	226	226	-	-
Population and Employment Density	34	150	116	341%

¹Based on a population and employment density of 150 people and jobs/ha.

²Excludes environmental features.



4.4.2.6 Forecast Growth, and People and Jobs Density

Over the longer term, it is forecast that there will be potential to accommodate an additional 9,800 people and jobs over the 2019 to 2041 period. Further, it is anticipated that the people and jobs density would increase from 34 people and jobs per gross ha in 2019 to approximately 77 people and jobs per gross ha in 2041, an increase of 127%. Based on a review of intensification opportunities, there is sufficient intensification potential to accommodate the forecast to 2041.

Figure 4-16
City of Barrie
Allandale Waterfront M.T.S.A.
Density, Population and Employment Forecast to 2041

Delineated Allandale Waterfront M.T.S.A.	2019	2041	2019-2041 Change	2019-2041 Change (%)	Annual Change
Population	4,100	12,800	8,700	212%	395
Residential Land Area, Gross ha ¹	89	89	-	-	-
Population Density (population/ha)	46	143	97	-	-
Employment	3,600	4,700	1,100	31%	50
Population and Employment	7,700	17,500	9,800	127%	445
Land Area, Gross ha ¹	226	226	-	-	-
Population and Employment Density (people and jobs/ha)	34	77	43	127%	-

Source: Watson & Associates Economists Ltd.

¹ Excludes Environmental Features.

4.4.2.7 Conclusions – Allandale Waterfront M.T.S.A.

The City will need to explore an appropriate local target for the Allandale Waterfront M.T.S.A. at buildout that considers local planning issues and aligns to transit investment. As discussed previously, the Allandale Waterfront M.T.S.A. is forecast to increase from 34 people and jobs per gross ha in 2019 to 77 people and

Allandale Waterfront M.T.S.A. Density by 2041

The average density of the Allandale Waterfront M.T.S.A. is forecast to increase from 34 people and jobs per gross ha in 2019 to 77 people and jobs per gross ha by 2041.



jobs per gross ha by 2041. Based on a review of intensification opportunities identified by the City of Barrie, there are sufficient residential development opportunities within the M.T.S.A. to accommodate the forecast population by 2041. Relative to historical trends, a significant share of population and employment growth has been allocated to this area over the 2016 to 2041 period.

4.4.3 Barrie South GO Station

4.4.3.1 Description of the Site and Current Transit Services

At the approximate centre of the Barrie South GO Station site is the GO train station. The site accommodating the station is approximately 5 gross ha (12 gross acres), which provides approximately 615 parking spaces. The GO train station is accessed via Mapleview Drive and Yonge Street, major arterial roads. The existing GO train station site does not encourage pedestrian movement due to the setback of the station from the nearest road. The pedestrian pathway from the GO train station to the nearest road (Yonge Street) is a 330-metre walk.

The Barrie South GO Station has weekday commuter GO train service consisting of seven trains running southbound to Toronto Union Station in the morning, and seven trains returning northbound from Toronto Union Station in the afternoon. In addition, the train station offers GO bus service, as well as City of Barrie transit bus services and connections to VIA Rail.

Figure 4-17
City of Barrie
Barrie South GO Station Site



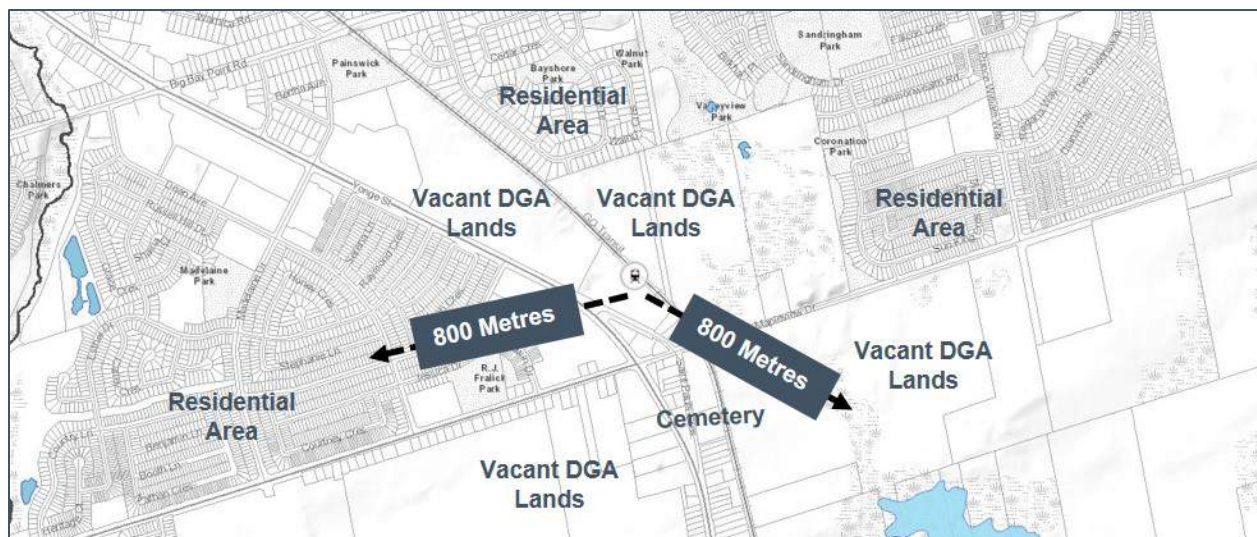
Source: Adapted from Google Earth Imagery by Watson & Associates Economists Ltd.



4.4.3.2 Description of the Surrounding Area

The Barrie South GO Station is located in the City's south end and is surrounded by greenfield lands. As previously mentioned, the GO station is located outside the B.U.A. and any development that accommodates population and employment growth within the area does not represent intensification in accordance with the Growth Plan, 2019. The area is largely considered undeveloped: to the west and north of the station are vacant designated lands and newly developed subdivisions; environmental lands and vacant designated lands are located to the east; and the area to the south includes a cemetery and lands planned for urban development (Hewitt's Secondary Plan Area).

Figure 4-18
City of Barrie
Barrie South GO Station



Source: Base mapping adapted from County of Simcoe, Online Mapping by Watson & Associates Economists Ltd.

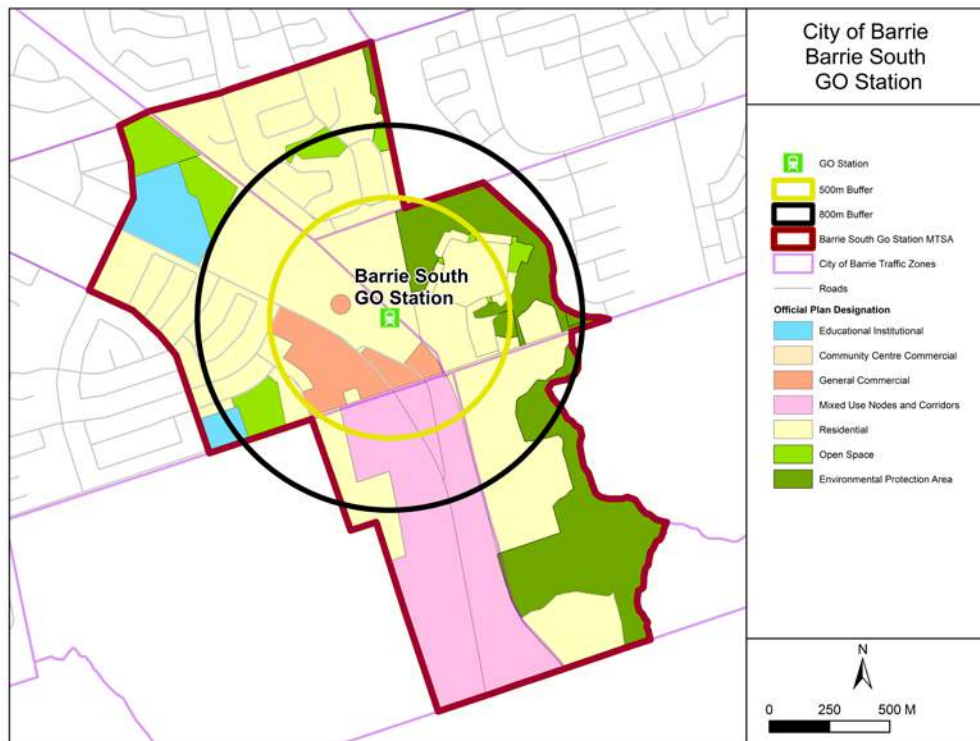
4.4.3.3 Delineated Major Transit Station Area

As illustrated in Figure 4-19, the delineation of the M.T.S.A. is based on the City's traffic zones that are within a 500 to 800 metre buffer. It is important to note that the City's traffic zones extend beyond a 500 to 800 metre buffer. The City may consider a further refinement of the M.T.S.A. based on planning considerations and the phasing of growth. The land area of the M.T.S.A. is approximately 270 gross ha/667 gross acres (net of non-developable features) as summarized in Figure 4-20. The area predominately



includes lands designated for residential and commercial uses, as summarized in Figure 4-21.

Figure 4-19
City of Barrie
Delineation of Barrie South M.T.S.A.



Source: Watson & Associates Economists Ltd.

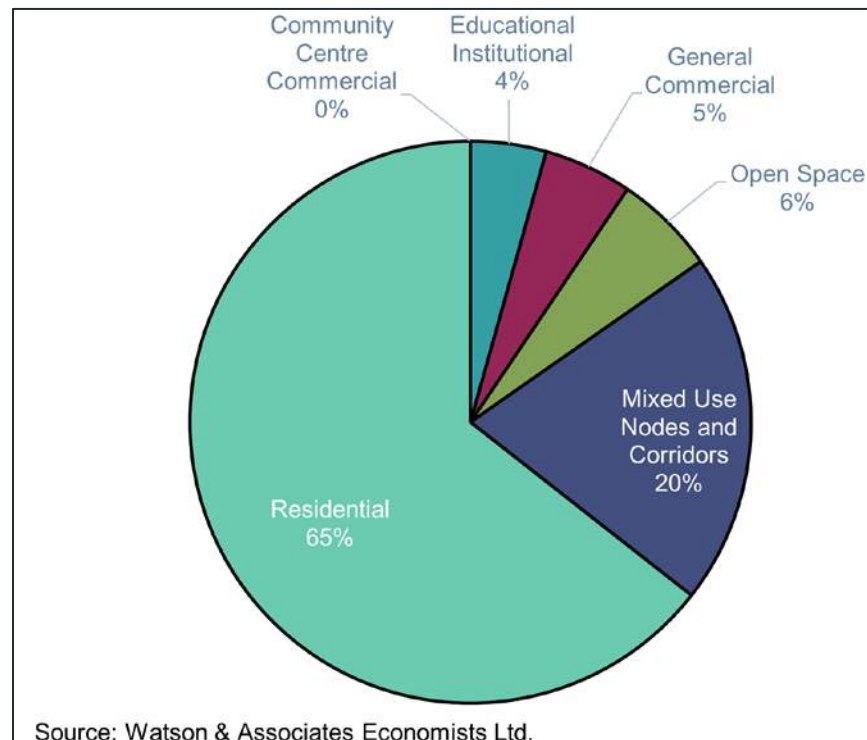
Figure 4-20
City of Barrie
Barrie South M.T.S.A., Gross Land Area (ha)

Delineated M.T.S.A.	Land Area (ha)
Gross Land Area	329
Environmental Features	50
Cemetery	2
Gross Land Area, Net of Non-Developable	277

Source: Watson & Associates Economists Ltd.



Figure 4-21
City of Barrie
Barrie South M.T.S.A. by Designated Land Uses,
Gross Land Area (ha)



4.4.3.4 Existing Population, Employment and Density, 2019

As summarized in Figure 4-22, the Barrie South M.T.S.A. has an estimated population base of 2,700 persons and an employment base of approximately 300 jobs. Based on a developed gross land area of 81 ha (200 acres) and a combined population and employment estimate of 3,000, the M.T.S.A. has a density of 37 people and jobs per gross ha. It is important to note that this density is based on the developed portion on the western and northern fringe of the M.T.S.A. The existing density is low due to a combination of factors, including:

- A low average density of the surrounding residential neighbourhoods of 44 people per ha (residential uses are primarily single detached dwellings);
- Limited employment in the area; and
- The parcel size of the transit station (approximately 5 ha/12 acres).



Figure 4-22
City of Barrie
Barrie South M.T.S.A.
Population and Employment Density, 2019

Delineated Barrie South M.T.S.A.	2019
Population	2,700
Developed Residential Land Area (includes only residential), Gross ha ¹	45
Population Density (population/ha)	60
Employment	300
Population and Employment	3,000
Developed Land Area, Gross ha ¹	65
Population and Employment Density (people and jobs/ha)	46

Source: Watson & Associates Economists Ltd. based on background work prepared for the City of Barrie Long-Term Growth Scenarios Review, October 26, 2018.

¹Excludes environmental features.

4.4.3.5 Development Opportunities

Figure 4-23a illustrates the location of development opportunities within the Barrie South M.T.S.A., while Figure 4-23b provides aerial imagery of the potential intensification sites within proximity to the GO train site. Figures 4-23c and 4-23d provide a summary of the potential for housing development based on development opportunities within the M.T.S.A. In total, the M.T.S.A. has the potential to accommodate approximately 10,600 additional housing units, representing a gross population of 20,800. It is important to note that this area includes large parcels of vacant land designated community commercial and mixed-use nodes and corridors that provide opportunities for non-residential development.



Figure 23a
City of Barrie
Barrie South M.T.S.A.
Development Opportunities

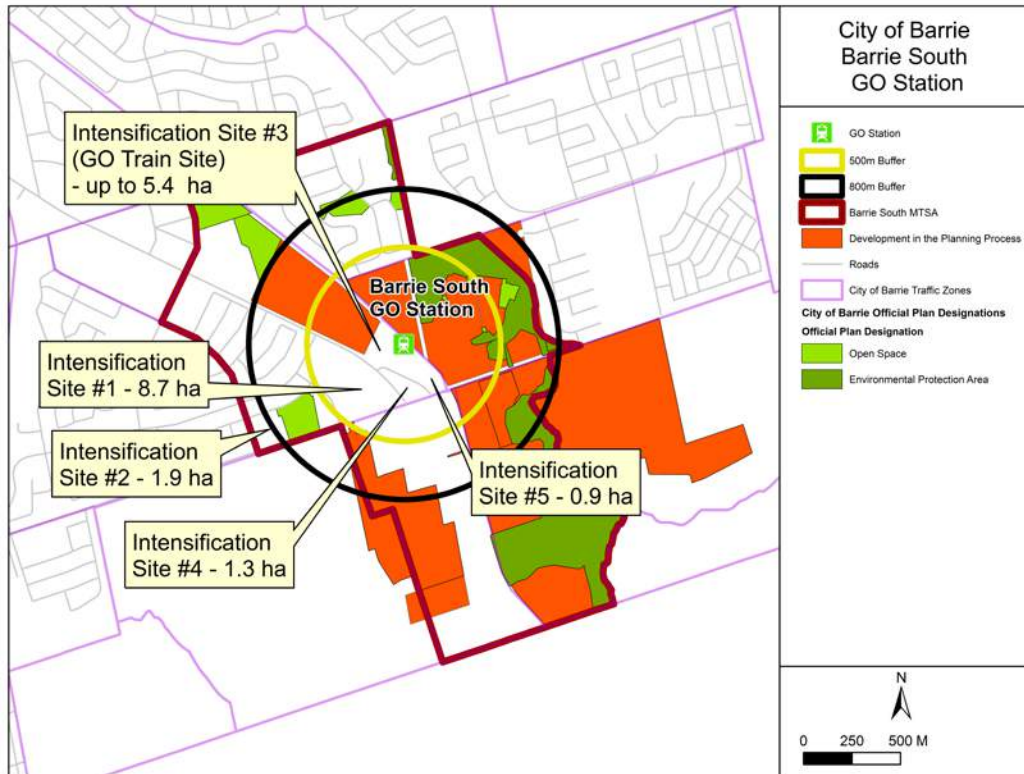




Figure 4-23b
City of Barrie
Barrie South M.T.S.A.
Intensification Opportunities



Figure 4-23c
City of Barrie
Barrie South M.T.S.A.
Intensification Opportunities

Sites	Hectares	Floor Area Ratio (F.A.R.)	Units ¹	Estimated Population ²
Site 1 (Yonge St./Mapleview Dr.)	8.7	3.00	2,665	4,580
Site 2 (Mapleview Dr./Dean Ave.)	1.9	3.00	570	980
Site 3 (GO Train Site - assumes 45% of parcel)	2.4	3.00	740	1,270
Site 4 (south of GO Train Site)	1.3	3.00	395	680
Site 5 (south of GO Train Site)	0.9	3.00	275	470
Total	15.2	3.00	4,645	7,980

Source: Watson & Associates Economists Ltd.

¹Based on a net to gross ratio of 85% and an average unit size of 900 sq.ft.

²Gross population estimates based on a high density persons per unit (P.P.U.) of 1.669. Population includes a 3% undercount.



Figure 4-23d
City of Barrie
Barrie South M.T.S.A.
Residential Intensification and New Development Opportunities

Housing Potential	Housing Units ¹				Estimated Population ²
	Low Density	Medium Density	High Density	Total Units	
In the Planning Process - south of Mapleview Dr.	828	374	766	1,968	5,080
Vacant Designated Land - south of Mapleview Dr.	0	0	1,187	1,187	2,040
Sub-Total - south of Mapleview Dr. (Hewitt's Secondary Plan Area)	828	374	1,953	3,155	7,120
In the Planning Process - north of Mapleview Dr.	0	1,033	1,717	2,750	5,690
Potential Intensification Sites - north of Mapleview Dr. ³	0	0	4,645	4,645	7,980
Sub-Total - north of Mapleview Dr.	0	1,033	6,362	7,395	13,670
Total Housing Potential	828	1,407	8,315	10,550	20,790

Source: Derived from data obtained from the City of Barrie by Watson & Associates Economists Ltd.

¹Low density: singles & semi-detached; medium density: townhouses; and high density: apartments.

²Gross population estimates based on persons per unit (P.P.U.): low density: 3.248; medium density: 2.571 and high density: 1.669. Population figures include a 3% undercount.

³Watson & Associates Economists Ltd. estimate based on: land area of approximately 15.2 ha; floor area ratio of 3.0; a net to gross ratio of 85%; and an average unit size of 900 sq.ft.

As summarized in Figure 4-24, in order for the Barrie South M.T.S.A. to reach 150 people and jobs per gross ha, the M.T.S.A. would need to add a net population and employment base of 38,600, which is greater than the identified intensification capacity. Achieving 150 people and jobs per gross ha in the Barrie South M.T.S.A. would require a significant transformation of this area.



Figure 4-24
City of Barrie
Barrie South M.T.S.A.
Theoretical Buildout Based on 150 People and Jobs/ha

Delineated Barrie South M.T.S.A.	2019	Buildout	2019 - Buildout	% Increase
Population and Employment ¹	3,000	41,600	38,600	1287%
Land Area, Gross ha ²	65	277	-	-
Population and Employment Density	46	150	104	225%

Source: Watson & Associates Economists Ltd.

¹Based on a population and employment density of 150 people and jobs/ha.

²Excludes environmental features.

4.4.3.6 Forecast Growth and People and Jobs Density

Over the longer term, it is forecast that there will be potential to accommodate an additional 24,400 people and jobs over the 2019 to 2041 period. Further, it is anticipated that the people and jobs density would increase from 46 people and jobs per gross ha in 2019 to approximately 99 people and jobs per gross ha in 2041, an increase of 114%. Based on a review of intensification opportunities, there is sufficient intensification potential to accommodate the forecast to 2041.



Figure 4-25
City of Barrie
Barrie South M.T.S.A.
Density, Population and Employment Forecast to 2041

Delineated Barrie South M.T.S.A.	2019	2041	2019-2041 Change	2019-2041 Change (%)	Annual Change
Population	2,700	22,500	19,800	733%	900
Developed Residential Land Area (includes only residential), Gross ha ¹	45	179	-	-	-
Population Density (population/ha)	60	126	66	-	-
Employment	300	4,900	4,600	1533%	209
Population and Employment	3,000	27,400	24,400	813%	1,109
Developed Land Area, Gross ha ¹	65	277	-	-	-
Population and Employment Density (people and jobs/ha)	46	99	53	114%	-

Source: Watson & Associates Economists Ltd. based on background work prepared for the City of Barrie Long-Term Growth Scenarios Review, October 26, 2018.

¹Excludes environmental features.

4.4.3.7 Conclusions – Barrie South M.T.S.A.

The City will need to explore an appropriate local target for the Barrie South M.T.S.A. at buildout that considers local planning issues and aligns to transit investment. As discussed previously, the Barrie South M.T.S.A. is forecast to increase from 46 people and jobs per gross ha in 2019 to 99 people and jobs per gross ha by 2041. Relative to historical trends, a significant share of population and employment growth has been allocated to this area over the 2016 to 2041 period. Based on a review of intensification opportunities identified by the City of Barrie, there are sufficient residential development opportunities within the M.T.S.A. to accommodate the forecast population by 2041.

Barrie South M.T.S.A. Density by 2041

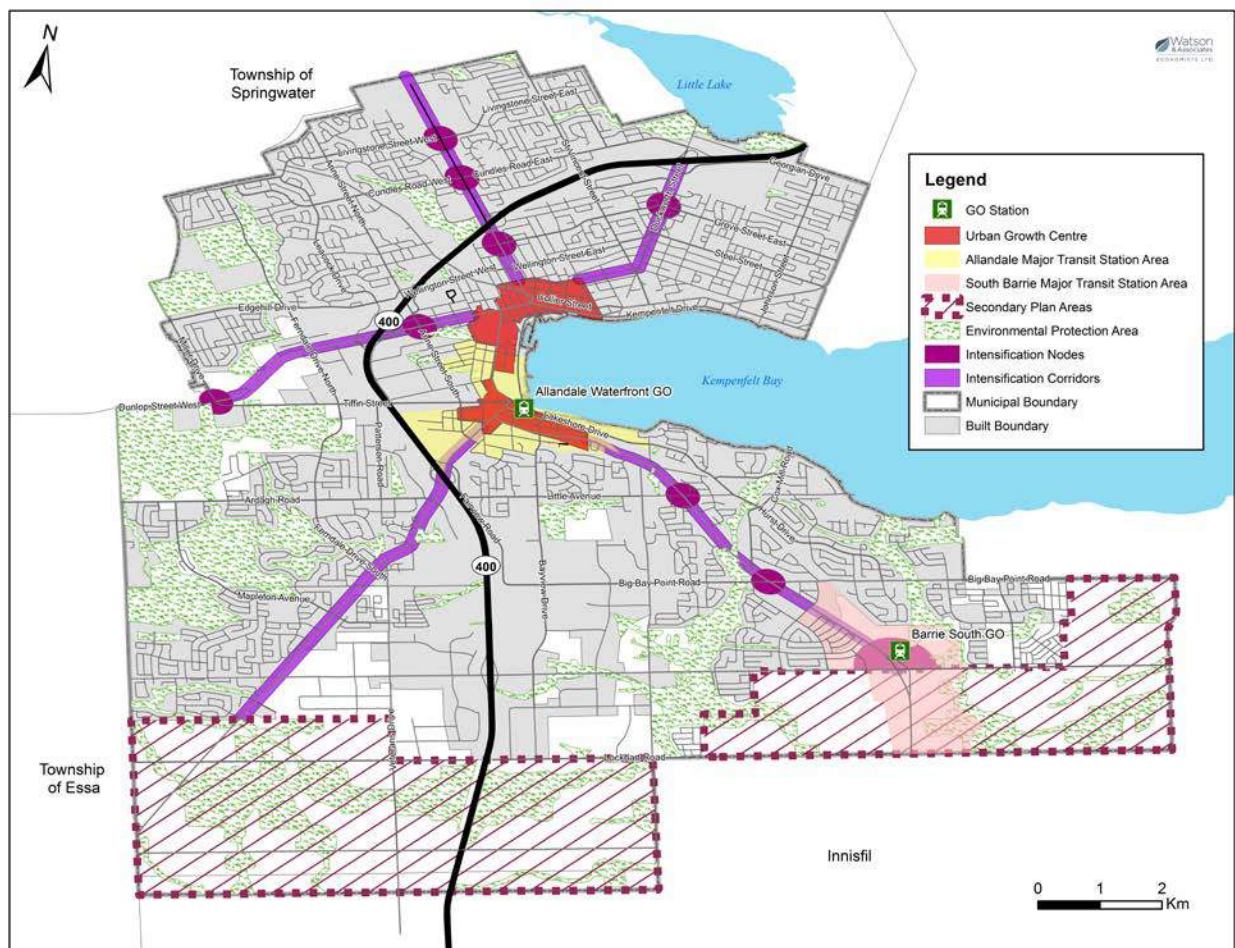
The average density of the Barrie South M.T.S.A. is forecast to increase from 46 people and jobs per gross ha in 2019 to 99 people and jobs per gross ha by 2041.



4.4.4 Proposed M.T.S.A.s and Urban Structure

Figure 4-26 illustrates the proposed M.T.S.A.s in relation to the City of Barrie's urban structure. The City's proposed M.T.S.A.s further extend the City's other Strategic Growth Areas. The South Barrie M.T.S.A. provides an opportunity to act as an important to transportation hub serving the City's D.G.A. communities, while the Allandale Waterfront M.T.S.A. provides an opportunity to support the U.G.C. and act as a conduit for transportation services supporting the City's intensification corridors.

Figure 4-26
City of Barrie
Proposed Barrie Major Transit Station Areas





4.5 Forecast Housing Intensification Demand by Policy Area, 2016 to 2041

4.5.1 Total Forecast Housing Intensification and Anticipated Timing of Development

Figure 4-27 summarizes the City's population and household forecast by B.U.A. and D.G.A. over the 2016 to 2041 planning horizon.¹ As summarized in Figure 4-27, the forecast rate of residential intensification (share of new housing units constructed within the B.U.A.) over the forecast horizon, is anticipated to increase from 33% between 2015 and 2022, to 50% from 2031 to 2041. Over the 2022 and 2041 period, the City is forecast to achieve an intensification rate of 47%. Based on the identified intensification opportunities summarize herein, the City has the capacity to accommodate the forecast allocation within the B.U.A., as summarized in Figure 4-28.

Notwithstanding the adequacy of supply opportunities to accommodate the City's housing intensification forecast, it is important to recognize that the forecast rate of housing growth within the B.U.A., summarized in Figure 4-28, is considerably higher than the historical level of residential development that the City has achieved within this area over much of the past decade. As summarized in Figure 4-29, on an annual basis the B.U.A. is forecast to add 828 housing units. Since 2011, approximately 417 units were added to the City's B.U.A. annually.

¹ It is estimated that the City has a current population of 300 residents and 130 housing units within the rural area (Salem and Hewitt's Secondary Plan Areas) as of 2016. This population base is included in the D.G.A. Over the forecast period it is assumed that this population will be displaced.



Figure 4-27
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
2016	136,300	9,500	145,800	49,450	3,020	52,470
2021	139,300	28,300	167,600	52,210	9,320	61,530
2031	154,400	55,600	210,000	60,560	20,150	80,710
2041	177,000	76,000	253,000	70,160	29,800	99,960
Growth Increment						
2016-2021	3,000	18,800	21,800	2,760	6,300	9,060
2021-2031	15,100	27,300	42,400	8,350	10,830	19,180
2031-2041	22,600	20,400	43,000	9,600	9,650	19,250
2016-2041	40,700	66,500	107,200	20,710	26,780	47,490
Share of Growth						
2016-2021	14%	86%	100%	30%	70%	100%
2021-2031	36%	64%	100%	44%	56%	100%
2031-2041	53%	47%	100%	50%	50%	100%
2016-2041	38%	62%	100%	44%	56%	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).



Figure 4-28
 City of Barrie
 B.U.A.
 Housing Demand by 2041 and Housing Supply Potential¹

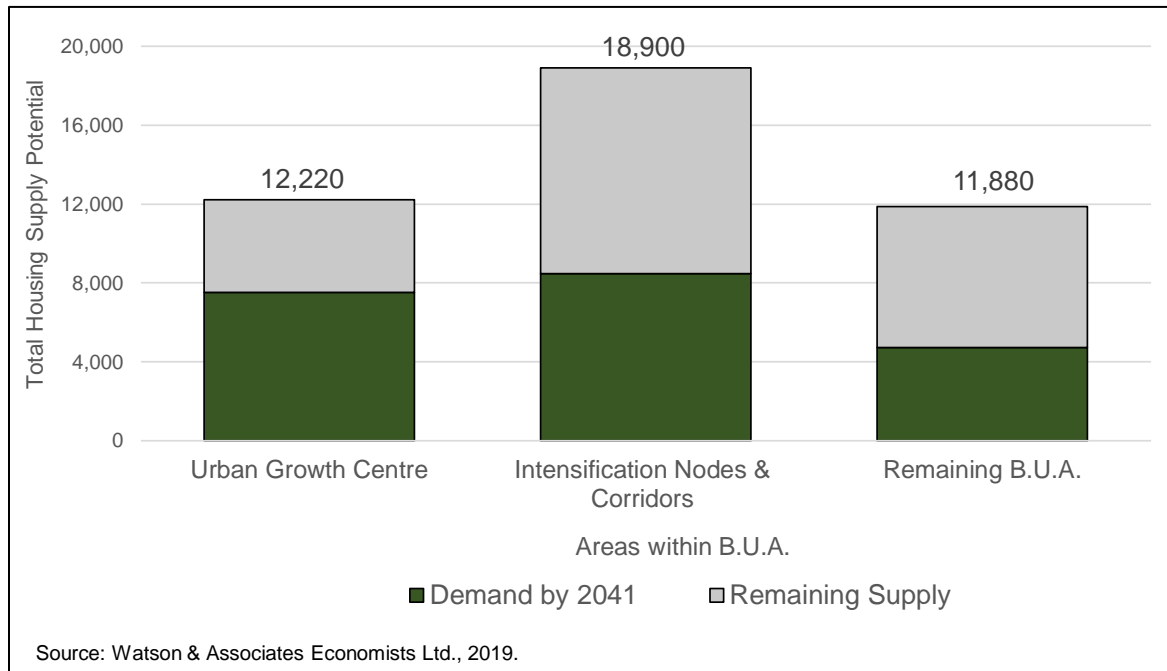


Figure 4-29
 B.U.A. and D.G.A.
 Historical and Forecast Annual Housing Growth

Location	Annual Housing Units	
	Historical 2011-2018	Forecast 2016-2041
B.U.A.	417	828
D.G.A.	124	1,071
City Annual Average	540	1,900

Source: Watson & Associates Economists Ltd.

¹ Based on a high range of intensification potential and includes opportunities for secondary suites.



Increased residential intensification in the City’s U.G.C. will be required for the City to reach its long-term intensification target. Approximately 7,600 units are forecast within the U.G.C. over the 2016 to 2041 period, representing 36% of the City’s housing growth within the B.U.A. over that period. Figure 4-30 summarizes the housing, population and employment growth forecast for the U.G.C., as well as the people and jobs density of the U.G.C. over the 2016 to 2041 period. As of 2016, the City of Barrie U.G.C. has a people and jobs density of approximately 72 people and jobs per gross ha, as summarized in Figure 4-30. By 2031, the City’s U.G.C. is forecast to add approximately 12,100 people and jobs per gross ha, an increase of approximately 107%. As a result, the U.G.C. is forecast to reach the Growth Plan target of 150 people and jobs per gross ha by 2031. The people and jobs density of the City’s U.G.C. is expected to reach 201 people and jobs per gross ha by 2041.

City of Barrie U.G.C. Density by 2031 and 2041

The U.G.C. is forecast to reach the Growth Plan target of 150 people and jobs per gross ha by 2031. By 2041, the people and jobs density of the City’s U.G.C. is expected to reach 201.

Figure 4-30
City of Barrie
U.G.C.

Forecast Growth and Population and Employment Density, 2016, 2031 and 2041

U.G.C.	2016	2031	2041	2016-2031	2031-2041
Housing Units	2,600	7,700	10,200	5,100	2,500
Population ¹	4,600	13,400	17,600	8,800	4,200
Jobs ²	6,700	10,000	13,800	3,300	3,800
Total People and Jobs	11,300	23,400	31,400	12,100	8,000
Gross Land Area, ha	156	156	156		
Density (people/jobs per gross ha)	72	150	201	107%	34%

Source: Watson & Associates Economists Ltd., 2019.

Note: Figures have been rounded.

¹Includes undercount.

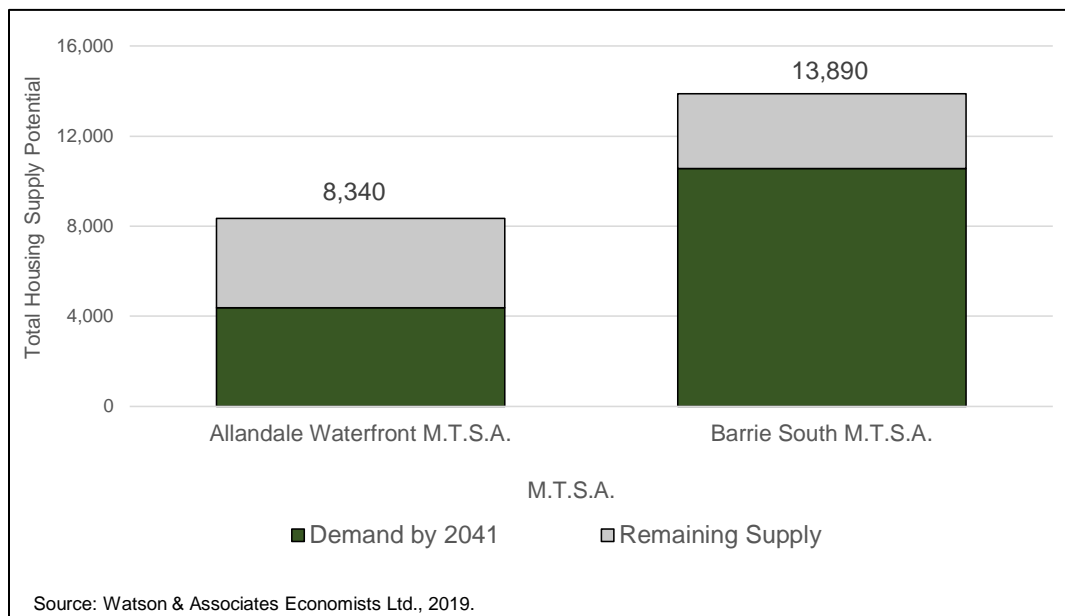
²Includes no fixed place of work and work at home employment.

As previously discussed, it is anticipated that the Barrie South M.T.S.A. and the Allandale Waterfront M.T.S.A. would not reach the Growth Plan target of 150 people



and jobs per gross ha density threshold by 2041. Relative to historical trends, a significant share of housing and population has been allocated to the M.T.S.A.s over the 2016 to 2041 period. Based on a review of intensification opportunities identified by the City of Barrie, there are sufficient residential development opportunities within the City's M.T.S.A.s to accommodate the forecast housing by 2041, as summarized in Figure 4-31. In order to achieve a Growth Plan target of 150 people and jobs per gross ha, the M.T.S.A.s would need to undergo a significant transformation to increase its intensification capacity over the long term (i.e. beyond 2041).

Figure 4-31
City of Barrie
Major Transit Station Areas – B.U.A. and Greenfield Areas
Housing Demand by 2041 and Housing Supply Potential¹



4.6 Conclusions

The City has significant opportunities to accommodate new housing within the B.U.A. (up to 43,000 units based on a high range scenario of intensification potential). While intensification opportunities represent a large portion of the total vacant housing supply within the City of Barrie, it is important to note that the majority (74%) of the

¹ Based on high range of intensification potential and includes opportunities for secondary suites.



intensification potential identified is comprised of high-density housing units (i.e. apartments). As summarized in Chapter 4, it is forecast that the City will achieve a built boundary intensification rate of 47% over the 2022 to 2041 forecast period. It is noted that this residential intensification target is close to the residential intensification target set out in the Growth Plan, 2019.

As the City's designated urban lands continue to mature and develop, a growing share of new residential and non-residential development is expected to occur within the City's intensification nodes, corridors and other redevelopment areas within the B.U.A., as directed by the City's O.P. policy. This shift in development patterns is anticipated to result in a steady increase in the share of high-density housing forms (i.e. low-, medium- and high-rise apartments) over the medium (2022 to 2031) and longer term (i.e. post-2031).

Accommodating a greater share of high-density development in the City of Barrie is fundamental to the objectives of this M.C.R. As the City of Barrie continues to mature, there will be a growing need to increase the utilization of available, designated urban lands to accommodate new development in more compact forms, particularly through high-density development. Population growth and increased urbanization of the City's B.U.A. are anticipated to bring new urban amenities and municipal services to the City (i.e. increased transit services, indoor recreation facilities, shopping, arts and cultural facilities, etc.) as well as local employment opportunities, which will benefit both the City and its local residents. Accordingly, provincial and local policies direct the City to accommodate an increasing share of its population base in high-density households. While this represents good planning policy, it is important to recognize that a large share of historical residential development within the City of Barrie has been ground-oriented. To achieve the intensification targets set out herein, a greater proportion of the City's existing and future population will need to be accommodated in high-density households, including a greater proportion of adults between 30 and 54 years of age and their children. From a real-estate market perspective, the objective of accommodating a greater share of families in high-density households can be challenging, given the relatively higher price and carrying costs associated with larger apartments (i.e. apartments with greater than two bedrooms) compared to more compact ground-oriented housing forms with relatively comparable livable space (i.e. townhouses, stacked townhouses/back-to-back townhouses and other low-rise hybrid buildings). Furthermore, the feasibility of high-density housing forms across the City's



existing neighbourhoods may need to be further examined against current zoning permissions for residential development. To facilitate this shift towards more compact high-density urban development, the City may also need to consider the use of planning and/or financial tools, as well as other policies, that address the implementation of the City's long-term vision.

With respect to residential intensification, there are two unique local factors that impede the City's ability to meet the requirements of the Growth Plan, 2019 with respect to residential intensification. These include:

- **Development of the Salem and Hewitt's Secondary Plan Areas** – impacts the percentage share of housing allocated to the B.U.A. within the City largely between 2016 and 2031, and to a lesser extent during the post-2031 period. The Salem and Hewitt's Secondary Plans are planned to collectively accommodate 40,600 persons by 2031. At buildout, it is estimated that the Salem and Hewitt's Secondary Plan Areas will accommodate approximately 50,700 persons.
- **Intensification of Lands Surrounding the Barrie South GO Train Station** – largely impacts the City's residential intensification target during the post-2031 period. The Barrie South GO train station is located outside the City's B.U.A. While housing growth within this area will be planned to largely accommodate high-density housing (i.e. low-rise, mid-rise and high-rise apartments), development immediately surrounding the Barrie South M.T.S.A is treated as greenfield development under the Growth Plan, 2019. This has the impact of further reducing the City's percentage of housing growth allocated to the B.U.A.

Figure 4-32 summarizes the City's greenfield housing forecast over the 2016 to 2041 period by geographic area under the Preferred Growth Scenario. In total, housing growth accommodated through intensification on the lands surrounding the Barrie South GO train station represents approximately 17% of forecast greenfield development (4,650 units) within the City between 2016 and 2041. It is important to note that this generally only includes growth to be accommodated within 500 metres of the Barrie South GO train station.¹

¹ The Barrie South M.T.S.A. includes a broader area (City Traffic Zones that are within 800 metres of the Barrie South GO train station), as delineated and summarized in Chapter 4. It is forecast that the Barrie South M.T.S.A. will accommodate approximately 39% of the D.G.A. housing growth forecast over the 2016 to 2041 period.



Figure 4-32
City of Barrie
Greenfield Development Forecast, 2016-2041

Geographic Area	2016-2041 Households	% Share
Salem & Hewitt's Secondary Plans	17,790	66%
Intensification Surrounding Barrie South GO Train Station ¹	4,650	17%
Other Greenfield Area	4,340	16%
Total D.G.A.	26,780	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.



Chapter 5

Employment Strategy



5. Employment Strategy

5.1 Introduction

This chapter provides a review of recent employment trends within the City of Barrie, the G.G.H. and the Province based on recent Statistics Canada data and other available information sources.¹ A commentary is provided on the City's Commercial and Employment Areas, including a discussion on key disruptors that are shaping the urban development patterns of these areas. This review has been prepared to provide insight with respect to the City's long-term employment land needs in accordance with employment growth anticipated for the City to the year 2041. Key components of this chapter include:

- Provincial, regional and local employment and development trends;
- A commentary on the major trends, disruptors and outlook for the City's commercial and employment lands;
- A summary of the vacant designated employment land supply and servicing status;
- A summary of recent employment land development and absorption trends;
- A review of employment density on employment lands; and
- An analysis of employment land demand and long-term land needs analysis.

5.2 City of Barrie Official Plan

5.2.1 *City of Barrie Official Plan Commercial Policies*

The City of Barrie's Official Plan outlines goals and policies related to the commercial land-use designations. Goals for commercial land use are as follows:

- (a) "To maintain, enhance, and support the City's role as the primary commercial/service centre of the region.
- (b) To encourage the maintenance and expansion of commercial/service-sector activity through the adoption of land-use designations and policies which will complement and enhance the

¹ It is noted that the historical time period investigated varies throughout this chapter, subject to data availability.



efforts of the private sector in the provision of goods, services and employment opportunities.

- (c) To promote a distribution of commercial facilities that provide a high level of convenience and accessibility for residents and limit the need for travelling extensive distances for minor purchases and local service facilities.
- (d) To minimize the impacts of retail and other service development on adjacent land uses and on the traffic carrying capacity of area roads.”¹

The O.P. establishes five commercial land-use designations: City Centre, Regional Centre, Community Centre, General Commercial, and Convenience Commercial. Schedule A of the O.P. exhibits the land-use designations for the City of Barrie. Commercial lands are dispersed throughout the City with concentrations along Highway 400, Yonge Street, Dunlop Street and Bayfield Street. These areas represent the primary corridors within the City and provide connectivity with the broader region.

City Centre Designation

The City Centre land-use designation is intended to provide a range of retail, service, office, institutional, public and residential uses to serve the needs of Downtown residents as well as specialized functions for the entire community and market area. Commercial uses are to be integrated with residential uses, community facilities, and open space. Permitted uses within the City Centre include:

- Commercial uses ranging from local service and retail use to business and administration uses;
- Residential development, including upper storeys of commercial buildings;
- Cultural, institutional, and recreational uses; and,
- Major office uses.

Section 4.3.2.2 states that, “Commercial uses shall be located so as to avoid an undue concentration of uses that reduce the quality of the pedestrian environment or have the potential to negatively impact the City’s downtown revitalization efforts.”

¹ City of Barrie Official Plan, p. 4-12.



Downtown Barrie has experienced significant change as a result of revitalization efforts and investment. The O.P., Next Wave Revitalization Plan, and the Downtown Commercial Master Plan, envision the City Centre as a complete, pedestrian-oriented community. The redevelopment of the Foodland site, located at the intersection of Collier Street and Mulcaster Street and adjacent to City Hall, marks an important step in achieving this vision. The seven-storey mixed-use development includes 82 residential units, over 6,500 sq.m (70,000 sq.ft.) of retail space, and 9,300 sq.m (100,000 sq.ft.) of office space. The “Collier Centre” represents a significant commercial offering within the City and will act as a hub for the City Centre.

Private-sector investment has been complemented by various City and Downtown Barrie Business Association (B.I.A.) initiatives including the \$250,000 Patio Program which has increased sidewalk width and introduced street-front patios on Dunlop Street. Other important initiatives include the Waterfront and Marina Strategic Plan which has integrated the City Centre and waterfront to assist in creating a thriving downtown.

As a U.G.C., Downtown Barrie is forecast to experience increased intensification. Higher density development accompanied by revitalization efforts are shifting the commercial structure of Downtown Barrie, resulting in intensification of uses and a greater population base in the Downtown.

Regional Centre Designation

The Regional Centre land-use designation is intended to provide a range of retail, service commercial, and community facilities. Office and residential uses are also permitted within Regional Centres. Permitted uses within the Regional Centre include:

- All types of retail uses including supermarkets and food stores;
- Service commercial and personal service uses;
- Retail warehouse stores;
- Financial institutions and services;
- Business, professional and medical offices;
- Entertainment, recreation and other community facilities; and
- Medium- and high-density residential uses.

Regional Centres have a minimum building area of 45,000 sq.m (485,000 sq.ft.) and are intended to serve the Barrie trade area, which extends beyond the City limits. Regional



Centres are to be located on at least two arterial roads or a provincial highway. Commercial and residential uses can be located within a shopping centre or freestanding buildings.

There are two Regional Centre commercial sites in the City. Georgian Mall, owned by RioCan, is located in North Barrie at the intersection of Bayfield Street and Livingstone Street East. The mall was originally anchored by a Sears department store and a Dominion supermarket. The first major expansion added a two-level mall with an Eaton's department store which was later subdivided into a Sport Chek and HomeSense. The Georgian Mall now contains over 150 stores and 56,000 sq.m (600,000 sq.ft.) of commercial space.

The second Regional Centre Commercial site is occupied by RioCan Centre Barrie which is anchored by a Lowe's, MEC, and Zehrs. The centre is approximately 23,000 sq.m (245,000 sq.ft.) in size.

Community Centre Designation

Community Centre sites are similar to Regional Centres but are intended to be smaller in size and function. The Community Centre land-use designation permits the same uses as the Regional Centre land use. Community Centres have a maximum retail building area of 45,000 sq.m (485,000 sq.ft.) and are designed to serve one or more residential planning areas.

There are three Community Centre commercial sites in Barrie. These are Kozlov Centre, Bayfield Mall, and a retail strip that contains a Zehrs, Dollarama and Beer Store. The Bayfield Mall, anchored by a Canadian Tire, is the largest of the three Community Centres with approximately 43,000 sq.m (465,000 sq.ft.) of commercial space.

General Commercial Designation

The General Commercial land-use designation is intended to provide a range of retail and service commercial uses. The following uses are permitted within lands designated General Commercial:

- Large-scale retail and service commercial uses such as retail warehouse stores, automotive commercial, furniture and home furnishing uses, garden centres,



supermarkets and food stores, as well as smaller-scale retail, service commercial and personal service uses;

- Financial institutions and services,
- Business, professional and medical offices; and
- Restaurants, recreation, entertainment and other community facilities.

The majority of commercial lands in the City are designated General Commercial. General Commercial lands include Commercial Centres such as Park Place, SmartCentres Barrie North, SmartCentres Essa Road, and SmartCentres Barrie South.

Convenience Commercial Designation

The Convenience Commercial designation is intended to provide a limited range of retail and service commercial uses that serve the daily needs of adjacent residential areas. Individual Convenience Commercial sites will have a maximum area of 0.8 ha (2 acres) and are located at the intersection of collector roads and local roads.

Mixed-Use Nodes and Corridors Designation

Mixed-Use Nodes and Corridors are intended to be occupied by medium- and high-density residential, institutional and commercial facilities, and neighbourhood activity. These areas are to be pedestrian-friendly and maximize the use of public transit.

Permitted uses include:

- High- and medium-density residential;
- Live-work developments;
- Office uses;
- Institutional uses;
- Retail and service commercial uses primarily located on the ground floor of mixed-use buildings; and,
- Automotive related uses.

Section 8.5.7.3 states:

“Provision shall be made in the design of development to encourage pedestrian traffic generating activities, wherever feasible, particularly retail commercial uses and restaurants, at grade level, with residential, office and similar uses encouraged in upper storey locations, throughout nodes



and corridors, but particularly at key intersections of arterial roads and other arterial streets and collector streets.”

All the sites designated Mixed-Use Node and Corridor are located in South Barrie and are currently undeveloped. The O.P. outlines specific policies for the Essa/Salem Mixed-Use Node which sets a maximum retail and commercial gross floor area of 372 sq.m (4,000 sq.ft.).

5.2.2 City of Barrie Official Plan Employment Land Policies

The City of Barrie has five designated Employment Areas as illustrated in Figure 5-1:

- 400 East Employment Area;
- 400 North Employment Area;
- 400 West Employment Area;
- Alliance Employment Area; and
- Quarry Ridge.

The City of Barrie O.P. identifies four land-use designations that fall under the general category of employment lands (as defined herein), including “Business Park,” “Highway 400 Corridor,” “General Industrial” and “Restricted Industrial.” The four O.P. designations coincide with respective zoning that the City of Barrie approved on November 28, 2005 in By-law 2005-275, which constituted a comprehensive update to the Industrial Section (7) of Zoning By-law 85-95. The creation of the industrial zones was completed to segregate non-compatible uses into separate areas. Figure 5-1 illustrates the City’s employment land designations.

Business Park Designation

Business Park O.P. land-use designation in which “the predominant use shall be for prestige industrial and office-based uses in a landscaped campus-like setting.” There are currently five designated Business Park areas, including City-owned lands on the north side of Mapleview Drive west of Veteran’s Drive, lands within Quarry Ridge, and Park Place on the east side of Highway 400 (west of Bayview Drive). This corresponds to the EM1 zoning designation.



Highway 400 Industrial Designation

Highway 400 Industrial is intended to recognize the importance of the Highway as the major entrance to the City. It provides for a more restrictive range of uses, prohibits outside storage, and is subject to higher development standards. This designation corresponds to EM2 zoning. Areas with this designation includes lands along Highway 400 in the 400 East and Alliance Employment Areas.

General Industrial Designation

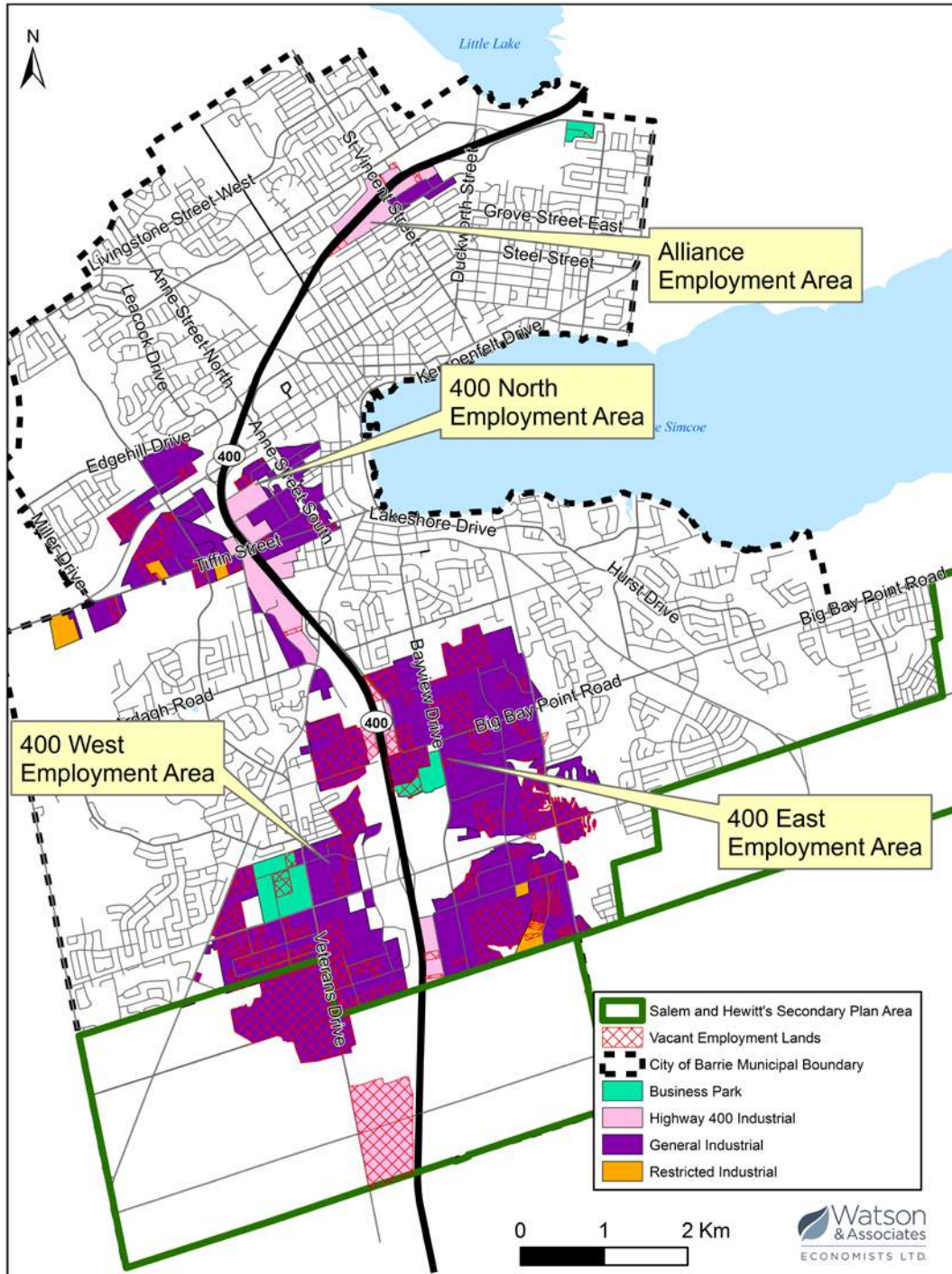
General Industrial is the largest land-use designation and focuses on the more traditional manufacturing and processing uses. It has less restrictive development standards than the Business Park and Highway 400 Corridor designation, including outside storage. It includes two zoning provisions, EM3 and EM4. The EM3 Service Industrial Zone is intended to be a transitional industrial zone between heavier industrial uses and non-industrial uses and, as well, is located along some major arterial roads (particularly Mapleview Drive). Non-traditional, quasi-commercial uses are located in this zone to allow for a variety of permitted uses without infringing on traditional industrial uses, such as those permitted in EM4. A large proportion of vacant employment lands in the 400 West Employment Area are zoned EM3. Meanwhile, the EM4 General Industrial Zone is the largest, and focuses on the more traditional manufacturing and processing uses. It has less restrictive development standards than the EM1, EM2 and EM3 zoning provisions, including outside storage. EM4 zoning covers the majority of employment lands in the 400 East and 400 North Employment Areas.

Restricted Industrial Designation

Restricted Industrial allows the majority of permitted uses limited to this zone only. Restricted Industrial permits uses with more significant off-site impacts relating to noise, vibrations or emissions. The designation applies to a very limited number of properties which are zoned EM5 Restricted Industrial Zone. Parcels with this designation and zoning are located primarily along Dunlop Street in the 400 North Employment Area and along Rawson Avenue in the 400 East Employment Area.



Figure 5-1
City of Barrie
Employment Areas and Designations





5.3 Retail Commercial Sector Overview

Provided herein is a brief commentary on the commercial sector component of the Employment Strategy, including a review of the City's commercial structure, trends and the outlook for the commercial sector in Barrie.

5.3.1 Characteristics of the City of Barrie's Retail Commercial Space

The City of Barrie contains a wide selection of retail formats from enclosed shopping centres to regional power centres to local conveniences and a historic downtown. Major destination retailers include department stores such as Walmart, The Bay, Costco, Home Depot, Lowe's, large format home furnishing stores and a wide selection of complementary retailers. It is established as a regional shopping destination for Simcoe County and it serves an area that extends well beyond the City limits. The current O.P. designations provide opportunities for a wide range of retail commercial uses distributed throughout the City. There has been significant retail development over the past decade within the City including Park Place and North Barrie Crossing.



Figure 5-2
City of Barrie
Major Retail Areas



5.3.2 Recent Development Activity

The last comprehensive review of the retail commercial structure in Barrie was conducted as a component of the G.M.S. in 2011. As a component of this study, W. Scott Morgan & Associates Limited prepared a “Retail Commercial Land Use Needs Study” (“Morgan Report”). The Morgan Report is the most recent inventory of commercial space in the City.

Since the Morgan Report, the City’s commercial structure has continued to evolve and grow. The following section provides an overview of significant retail commercial developments in Barrie since the Morgan Report.



Park Place

Park Place is a commercial centre currently under construction at the Highway 400 and Mapleview Drive interchange. It is designated General Commercial. Developed by North American Development Group, Park Place currently includes 56,000 sq.m (600,000 square) feet of commercial space. Big box style retail surrounds a village courtyard which includes 2,800 sq.m (30,000 sq.ft.) of ancillary retail in a pedestrian-oriented environment.

It is a 200-acre mixed-use centre comprising retail, commercial and office uses. At full buildout Park Place will provide approximately 74,300 sq.m (800,000 sq.ft.) of commercial space and, currently, it is anchored by a Cabela's and LA Fitness. Space from one of the previous anchor tenants, a 10,200 sq.m (110,000-sq.ft.) Target department store, is vacant.

Park Place is planned to be developed in stages and to include a Retail Village. The Retail Village is to be pedestrian-oriented and constructed with a high standard of urban design. Section 4.8.9.1 of the O.P. sets out requirements for a Retail Village as part of the Park Place development.

The main entrance and entry feature for the Retail Village shall be off Mapleview Drive. The Retail Village shall be comprised of a central pedestrian-scale street and shall require that all buildings within the Retail Village face each other, except for corner buildings. Buildings are to front not more than one internal street designed for the safe movement of a single lane in one-way traffic, associated turning movements for angle and/or parallel parking, and fire and emergency vehicle access, separated by a landscape median.

Construction began in 2010 with big-box format stores on the western portion of the site. This was followed by the Retail Village on Park Place Boulevard. The Retail Village is not yet fully built out. The southern portion of the Retail Village includes five freestanding restaurants with rear parking. The northern portion of the Retail Village has a mix of tenants with on-street parking. The middle of the Retail Village is currently undeveloped, presenting challenges for walkability and pedestrian-scale streets.



North Barrie Crossing

North Barrie Crossing is a mixed-use development at Cundles Road East and Duckworth Street in North Barrie. The western portion of the 18 ha (45-acre) site is occupied by residential uses. Cancellation of the MarketTown Condos by Mady Development delayed North Barrie Crossing. The residential component was completed in 2016 by Pratt Homes and is comprised of two six-storey condominium towers.

The first phase of the commercial component was completed in 2016 and includes a Shoppers Drug Mart, Zehrs, and Cineplex which anchor the site. The commercial component has been developed by Penady Barrie Ltd. and Choice Properties (Loblaws). The site will include several multi-tenant buildings at full buildout, with a mix of retail and commercial businesses.

Collier Centre

In 2012 the Foodland located at the intersection of Collier Street and Mulcaster Street, in Downtown Barrie, was demolished for a mixed-use development. The Collier Centre & Lakeview Condos, completed in 2017, are comprised of residential, retail and office uses. The Lakeview Condos is a 7-storey, 82-unit residential building. The Collier Centre contains approximately 5,600 sq.m (60,000 sq.ft.) of retail space, much of which is currently available for lease. There is also a vacant 9,300 sq.m (100,000 sq.ft.) office component, which is now proposed to be converted into 113 condominium residential units.

RioCan Centre Barrie

The RioCan Centre Barrie is located at the intersection of Bryne Drive and Essa Road. This centre is designated Regional Centre Commercial in the O.P. and includes 22,800 sq.m (245,000 sq.ft.) of commercial space.

Retailers include Mountain Equipment Co-op, Zehrs, Lowe's, and Leon's. The retail commercial offering has a destination draw serving local residents and the broader region. There are two hotels across the street from the Commercial Centre with additional hotel uses contemplated for the vacant land at 76 Bryne Drive.



5.3.3 Trends Impacting Commercial Development

There is a wide range of factors that continue to influence the demand for retail commercial space. Demand is influenced by customer preferences, retailer initiatives, planning policy and real estate development trends. Overall, there has been a decrease in demand for retail commercial space, on a per capita basis. The impacts of the consumer trends on commercial real estate differ, based on the geographic markets. Furthermore, there is no one general trend. While some trends indicate that stores are getting smaller, there are other trends that are resulting in larger stores. This section of the report examines the differing impacts in urban mixed-use markets, suburban markets and smaller cities and towns outside population centres.

The retail trends discussed in this section will influence the evolving retail environment in Barrie. This, in addition to intensification efforts as a result of Barrie's role as an urban growth centre, will encourage smaller format, urban, mixed-use development.

5.3.3.1 Retailers Responding to Changes in Customer Behaviour

The retail environment is undergoing a significant paradigm shift in how retailers view their stores and the way people purchase and consume retail goods and services. This shift has implications across a broad spectrum of associated areas including, but not limited to, store types, marketing, distribution, store format and leasing.

One of the overriding shifts in the retail industry has been the change in the balance of power from retailers to consumers. In the past, retailers were the sole source of many types of merchandise. Goods needed to be purchased, in person and in store, during the hours set by the retailer. The consumer was required to travel to the store in order to undertake this transaction, as the physical store was the only distribution channel available to shoppers.

The balance of power has shifted. Consumers now can choose their preferred method of purchasing most types of merchandise. The hours they choose to shop are no longer limited to the opening hours of a physical store. Customers can also choose from a variety of options to receive their merchandise. These include same-day delivery, in-store pickup, ship from store and scheduled delivery. Technological advancement has changed the retail industry and has impacted the retail environment.



Innovations, primarily through technology, have put the customer in charge. Shoppers can now choose to shop on their smartphones, computers and via telephone. Stores now need to support multiple activities: sales, returns, fulfillment, social gatherings, experiential events.

The overriding consumer-led factor affecting the retail environment is the diverging retail market. The most often cited reason for this diverging retail market is the growing income gap which has led to stagnating demand for stores in the middle of the market.

The diverging retail market can generally be described as follows: There are a growing number of households placing a greater emphasis on value retailing. The price of the product or service is often noted as the most important determinant of where people shopped. This emphasis on value has given rise to a wide spectrum of off-price and discount retailers. At the lower end, retailers such as Walmart and Dollarama are thriving. At the upper end of the off-price market, Nordstrom Rack and Saks Off 5th have entered the Canadian market.

Conversely, in the major urban centres, the high-end market is also thriving with many premium brands opting to open their own retail stores as opposed to allowing department stores to be the sole point of distribution. In addition, there is also a robust market for high-end independent stores. This trend is evident in the V.E.C.T.O.M. markets (Vancouver, Edmonton, Calgary, Toronto, Ottawa and Montreal); however, in the rest of the country, this portion of the market is largely non-existent.



Figure 5-3
Diverging Retail Market Spectrum
Retail Chains



A better-informed population with respect to healthy lifestyles is fuelling a boom in the health and wellness industry. There has been an emergence in the health and wellness sectors represented by micro fitness studios and health stores. This trend has mostly been felt in the middle and high-end markets. This trend has led to several cross promotional avenues, with fitness studios marketing their own clothing and nutritional brands. Technology, such as the Mindbody platform, is also fuelling the ability for consumers to approach scheduling with more flexibility.

The health and wellness space includes the proliferation of micro fitness locations such as Orange Theory Fitness, F45 Training, Soul Cycle and Barry's Bootcamp. There are also several retailers that are starting to provide health and wellness services along with their existing retail product lines. The health and wellness industry also extends to clean beauty products which is becoming more mainstream.

It should be noted that the health and wellness industry is also heavily influenced by trends within the diverging retail market. The U.S.-based Sports and Fitness Industry Association found in 2017 that families with incomes above \$75,000 show increasing activity levels. In contrast, families with incomes below \$75,000 show a growing level of inactivity.



Increased consumer spending on eating outside the home has resulted in perhaps the most visible change in the retail landscape with a significant increase in the number of food and beverage operators. This increased expenditure is a function of lifestyle and food costs, as well as technology which allows for multiple food-delivery options allowing restaurants to diversify income streams.

With the decline of traditional large and mid-size retail anchor stores, restaurants and other food and beverage concepts such as food halls and markets are taking their place. Food halls are increasingly being used to drive traffic to retail malls, mixed-use centres and are viewed as a prime amenity within office buildings.

Traditional supermarkets have been experimenting with home replacement meals (H.R.M.) for many years. In urban areas, however, supermarkets such as Loblaws Independent City Market and The Market by Longo's are offering an ever-expanding array of H.R.M. that are focused on young urban professionals.

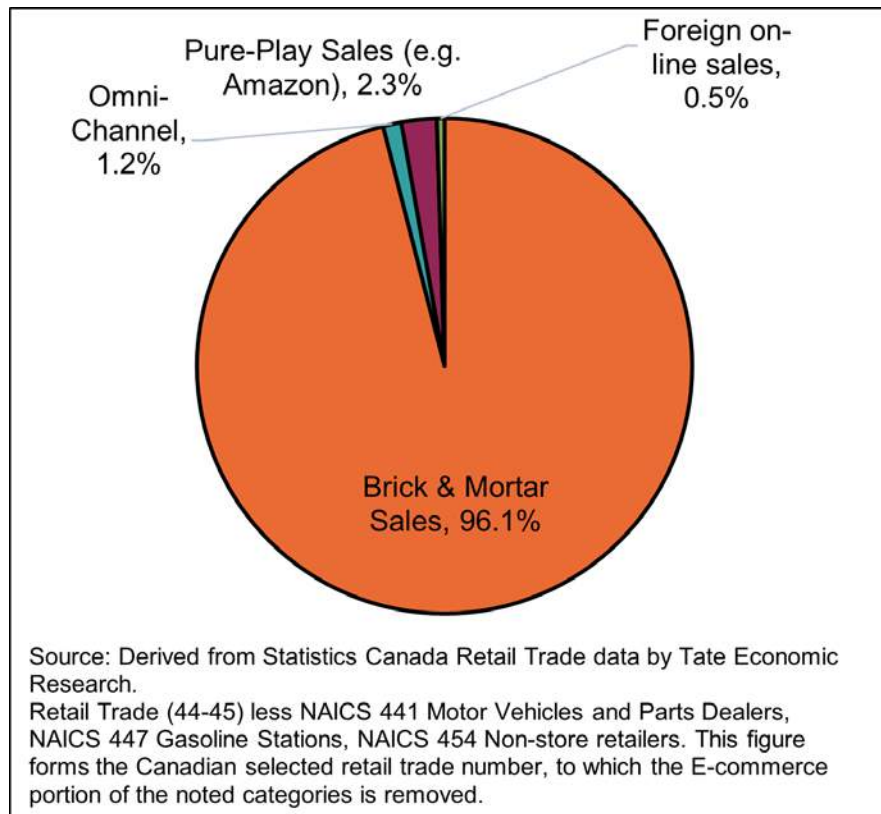
5.3.3.2 Retailers Responding to Retail Disruptors

In the retail real estate environment, the impact of E-commerce on existing retail nodes and future demand for retail is perhaps the most discussed topic. The impact of E-commerce is also often overstated, in part due to the lack of reliable data available in Canada. Recent changes at Statistics Canada has resulted in the timelier release of accurate data relating to the Canadian market. Establishing the amount of retail sales through E-commerce is becoming more difficult as stores move towards an omni-channel platform in which all sales are technically indistinguishable. Based on Statistics Canada data, it is estimated that approximately 3.9% of retail sales are made through E-commerce platforms. It should be noted that other sources estimate E-commerce platforms account for closer to 6.0%.

While the common perception is that Millennials are the driving force behind the rise of E-commerce, when examined more closely, E-commerce adoption is most strongly influenced by income levels. Higher income earners, regardless of generation, have a higher propensity to use E-commerce platforms. Lower income consumers are more apt to frequent brick and mortar retailers. The reason for the perception of Millennials as the driving force behind E-commerce is based on the premise that high-income Millennials spend a disproportionate amount of their income on E-commerce sites and, therefore, the average across all Millennials is seen as high.



Figure 5-4
Canada
Annual Retail Trade E-Commerce Statistics, 2016



As a result of the shifting balance of power between retailers and consumers, there has been increased expansion of the types of business models used by retailers. With the realization that the customer wants the omni-channel experience, pure-play internet retailers are recognizing the importance of physical stores (clicks-to-bricks). This realization is perhaps most directly indicated by Amazon's purchase of Whole Foods in 2017. In addition, there are many examples of smaller pure-play internet retailers opening physical stores in Ontario, including Warby Parker (optical) and clothing stores such as Frank + Oak and Indochino.

E-commerce, while only a small part of the overall retail economy, plays a significant role in consumer shopping patterns. Transactional shopping purchases are being made on-line when it's convenient to the shopper. Therefore, when a consumer goes shopping in a physical store, the expectation is for an "experience" that cannot be replicated on-line. This experience may be fulfilled through unique offerings at retailers



or through the physical design of centres. Experiential retail can be achieved across the retail spectrum. Although perhaps not obvious at first, one of the most successful experiential retailers is Winners. Winners does not have an on-line presence and has created a strategy where frequent shopping results in "finding" an unbelievable deal; however, if you don't go often (i.e. weekly) you risk missing out on the "greatest deal." The emergence of experiential retail is further bolstered by advances in technology which allow stores to provide interactive experiences linked to social media.

A new type of retail diversification is occurring in the independent and small-chain retail space with the diversification of uses. The diversification of uses serves to create a unique experience that differentiates them from on-line offerings. At the same time, it protects against the ebbs and flows of retail business, by offering a variety of product lines and services that also increase the ability of the retail store to be productive at various "off peak" times of the day and week. The new "retail hustle" encompasses aspects of experiential retail through design and function, and often operates as an omni-channel retailer with both an on-line and brick and mortar presence.

Changes in consumer behaviour and innovations in the retail industry have a direct impact on the development of commercial real estate. Consumers are being increasingly drawn towards both value and luxury retailing, while technological innovations in E-commerce and experiential retail are changing the perception of what is required from a physical retail store. When developing new retail spaces, flexibility should be prioritized, in order to satisfy new store concepts, the increasingly diverging demands of consumers, and the continuing advancements in retail technology and innovation.

5.3.3.3 Blurring of Retail Channels

In the past, most retailers tended to concentrate on one particular line of merchandise. For example, grocery stores focused on food, and drug stores provided primarily health-related products. Recent changes in retailing have resulted in a tendency to create a "one-stop" shopping experience in order to increase market share. Many retailers, which previously offered specific product lines, now offer a much wider range of merchandise. These retailers include Shoppers Drug Mart, Walmart Supercentre, Canadian Tire and Winners, as well as many others.



5.3.3.4 *Changes in Retail Built Form*

In the 1960s through to the 1980s, the majority of retail development was in the form of enclosed shopping centres or "mall." Malls varied in size, from large super regional centres (e.g. CF Toronto Eaton Centre and Yorkdale) to smaller community-sized malls. Barrie's commercial structure exemplifies this with examples such as Georgian Mall, Bayfield Mall, and Kozlov Centre.

From the 1980s onward, the majority of retail development in Canada has either been in the form of grocery-anchored neighbourhood centres or power centres. Both forms of development have typically been single-storey developments with a building-to-land coverage of approximately 25%. This development format reflected the automobile-oriented consumer, as well as the supply of commercial designated land, which in the past has been abundant.

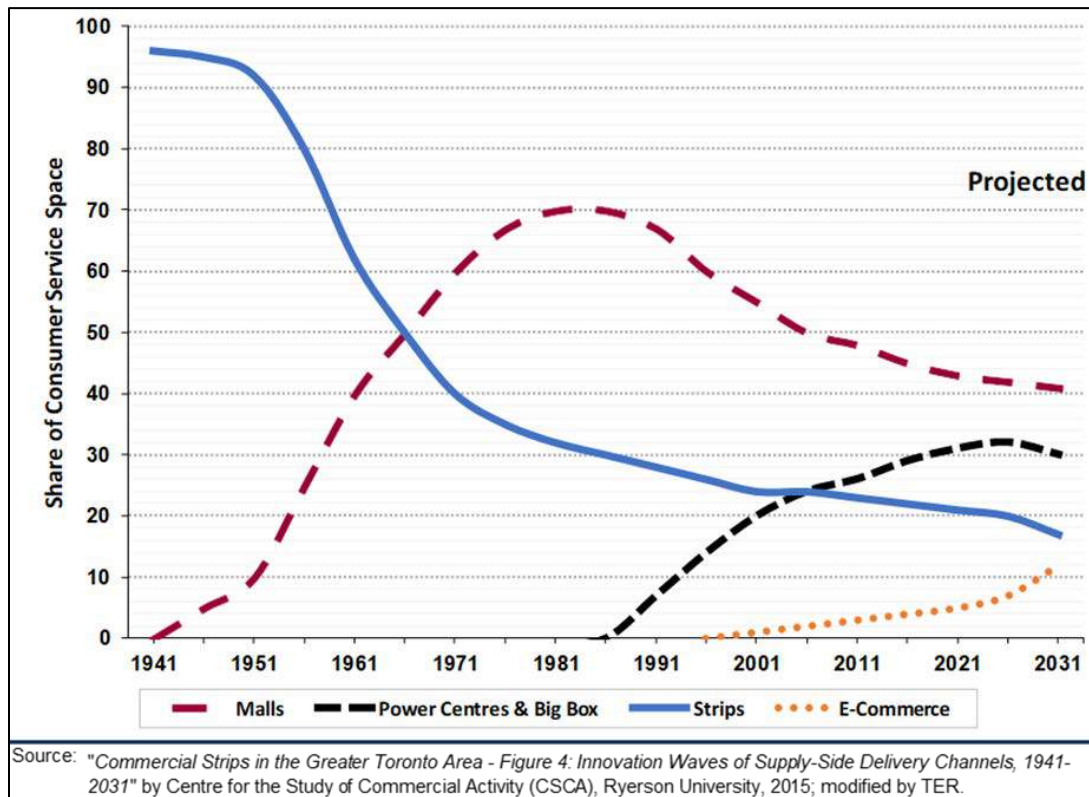
As shown in Figure 5-5, the market share of enclosed shopping malls has been declining in the past three decades. Lower-tier enclosed community and neighbourhood centres make up the bulk of this decline as upper-tier regional malls have generally stayed strong due to their focus on high-end/destination retail.

Community- and neighbourhood-sized centres were first impacted by the emergence of power centres. Power centres offered an alternative to the traditional enclosed mall format and were cheaper to operate as they featured lower land costs, rents and lower common area maintenance (C.A.M.) costs. They also provided opportunities for "big box" stores, many of which could not be accommodated in existing enclosed shopping centres. Power centres were particularly attractive to middle-tier retailers that historically operated in community- and neighbourhood-sized malls.

The challenge for community and neighbourhood shopping centres is further exacerbated by the diverging retail market, which saw consumers increasingly desire more value-oriented or high-end retail stores. Some middle-market retailers, which made up a significant portion of community and neighbourhood mall tenants, relocated to a less expensive retail format or disappeared from the Canadian market altogether.



Figure 5-5
Canada
Historical and Projected Share of Retail Spending



Many community-scale shopping centres have been in decline. In the Barrie context, redevelopment opportunities exist for enclosed community and neighbourhood malls, due primarily to the demand for residential development. The City continues to grow by approximately 2,000 persons per year. There is the opportunity to accommodate this population growth through the redevelopment and intensification of occupied lands.

Furthermore, many of the existing community and neighbourhood malls built between the 1960s and the 1980s are located at the intersections of arterial roads, close to existing and planned transit networks. These prime locations contribute to the intensification potential for mixed-use and/or residential development on these sites. The combination of the accelerated population growth in the G.T.A., housing market conditions and the presence of many community and neighbourhood centres at major intersections, has led to an increasing amount of redevelopment opportunity across the G.T.A. for community shopping centres.



In areas outside the G.T.A. where there is less population growth, redevelopment opportunities for comparable sites are less prevalent. The slower pace of redevelopment outside the G.T.A. reflects the availability of greenfield sites for development, which are more economically viable for development in comparison to existing shopping centre sites.

In urban centres, where land supply is diminishing, there has been a gradual shift towards urban intensification and compact mixed-use developments. This shift is a result of the tightening of land supply and has forced developers to examine different concepts. Some of these development options are outlined below.

Mixed-use

Mixed-use developments are at the forefront of urban development. At its most basic description, mixed-use developments comprise different land uses within a vertical or horizontal plan. As an example, vertical mixed-use building could include retail on the ground level and office, hotel or residential uses in the floors above. Vertical mixed-use is primarily located in urban centres and around transit nodes. From a retailer perspective, there are several challenges associated with vertical mixed-use formats such as potential second floor locations, multi-floor retail units, parking and loading restrictions as well as accessibility considerations. Generally, Canadian retailers have yet to fully embrace the challenges of mixed-use developments. Horizontal mixed-use typically refers to the mix of uses on a master planned site versus in individual buildings.

Urban Retail Intensification

The underlying principle of retail development, “location, location, location,” continues as the primary factor behind urban retail intensification. The success of shopping centres/retail nodes is driven by location and, therefore, consumer accessibility. Existing retail locations that offer the best access, visibility and exposure characteristics remain the most valuable for shopping centres/retail nodes in general, and for intensification opportunities in particular.

As population densities increase and Transportation Demand Management (T.D.M.) initiatives including public transit infrastructure are realized, the emphasis on catering to the automobile-oriented customer will be diminished for some shopping formats. The potential for intensification is related to accessibility in the form of roads, transit or nearby residential/employment populations. Ultimately, intensification is a direct result



of land economics. Increased customer accessibility leads to the potential to achieve greater investment returns through more efficient land uses. Accessibility, in the forms outlined above, provides incentive for intensification of shopping centre sites and other sites within retail nodes.

5.3.3.5 Mixed-Use Location Economics and Demand

Retail units in mixed-use buildings require the same attributes as typical retail whether they be on main street or in strip plazas, power centres or shopping centres. Pedestrian and/or vehicular traffic is critical. This traffic is generated by the surrounding residential density and the daytime population.

The number of pedestrians passing by a store front on a given day is known as the store's "footfall density." It is generally assumed that footfall density is influenced by the attraction of a retailer; however, there are multiple geographical factors relating to transportation, employment and social life that influence it. Footfall density is critical as the number of people that actually enter a store, and the conversion rate (the percentage of people that actually make a purchase), is typically low.

Figure 5-6
Key Components of Successful Mixed-Used Developments



The amount of retail space supported by the on-site residents of a mixed-use development is typically overstated. Furthermore, demand generated solely by proximity to transit is also typically overstated. The market support for the commercial space must extend well beyond the immediately adjacent demand generators.

If market demand to support traditional types of retail is not present, which is the case in many non-main-street infill mixed-use developments, consideration should be given to



interim uses that allow for transition to retail uses when demand materializes. These interim uses require creative thought from developers and could include uses such as live work/units.

Demand will also be influenced by tenant mix. In traditional retail developments, the tenant mix is often determined by the anchor and achieving a mix of stores within categories. The draw of the anchor tenant can overcome gaps in the tenant mix. In mixed-use developments, however, where often there isn't an anchor tenant, the wrong tenant mix is much more punitive and, therefore, the approach to tenancing has to be more proactive and often requires a strategic approach to identifying the right tenants.

5.3.4 City of Barrie Mixed-Use Opportunities and Challenges

Population and employment growth in the U.G.C., M.T.S.A., and Intensification Corridors presents opportunity for retail commercial development. This opportunity is not without significant challenges.

In general, there are significant retail commercial synergies related to high-density mixed-use areas. These synergies include increased consumer demand, walkability, and cross-shopping opportunities.

5.3.4.1 Opportunities

There are several examples of mixed-use developments in Barrie. Nearing completion is the Collier Centre in the downtown. There is a major mixed-use community proposed on Yonge Street, adjacent the Barrie South GO Station. The Barrie South development is planned to include 1,330 residential units and approximately 2,800 sq.m (30,000 sq.ft.) of retail commercial space. These projects are indicative of market trends and may signify the initial acceptance, from both the development industry and the consumer market, for more intensive development in the City of Barrie.

Population and employment density are typically factors that directly influence the success of a ground-floor commercial component in a mixed-use development. Other more site-specific factors can also play a critical role, including parking and pedestrian access through transit.



5.3.4.2 Challenges

There are several challenges to retail commercial development in general, and particularly in Barrie. These challenges can be noted in the U.G.C., Intensification Corridors, and Mixed-Use Transit Areas. These challenges include:

- Dedicated street-level parking remains the ideal;
- Conflicts between commercial and residential uses, especially in relation to food and beverage tenants;
- Retail commercial space supported by on-site residents is typically overstated;
- Demand generated by proximity to transit is typically overstated;
- Retail units within mixed-use buildings require the same attributes as traditional retail commercial; and
- There are few anchor tenants willing to locate within mixed-use developments.

5.3.4.3 Outcomes of Mixed-Used Development

The retail component of mixed-use developments, when designed thoughtfully and tenanted with an understanding of the surrounding neighbourhood, provide numerous benefits to the surrounding community. These positive effects include:

- The activation of the street edge or neighbourhood;
- Providing retail goods and services in modern, efficient formats;
- More efficient use of infrastructure; and,
- The ability to live and work in the same community.

Success of ground floor retail in mixed-use buildings, however, is only possible if the development is viewed through the lens of “retail units with residential above” as opposed to “residential with ground-floor retail units.” This concept reinforces why many mixed-use developments struggle to effectively tenant their ground-floor commercial space.

5.3.4.4 Conclusions

Mixed-use development concepts have been developed in Barrie. General market trends indicate opportunity for retail components in mixed-use buildings. The retail component of mixed-use developments is challenging to develop in markets such as



Barrie and each potential development may require a site-specific assessment to determine market opportunity.

5.4 Employment Lands Overview

Provided herein is a brief commentary on the City's Employment Areas, a component of the Employment Strategy, including a review of the development trends on employment lands and an outlook for employment lands development within the City of Barrie.

5.4.1 Provincial and Regional Economic Trends Impacting Employment Land Development

In examining the City of Barrie's employment lands, it is essential to understand the broader influences and factors that affect the regional economy as a whole. This section examines recent macro-economic trends influencing labour force and employment trends at the provincial and G.G.H. levels.

5.4.1.1 Provincial Trends

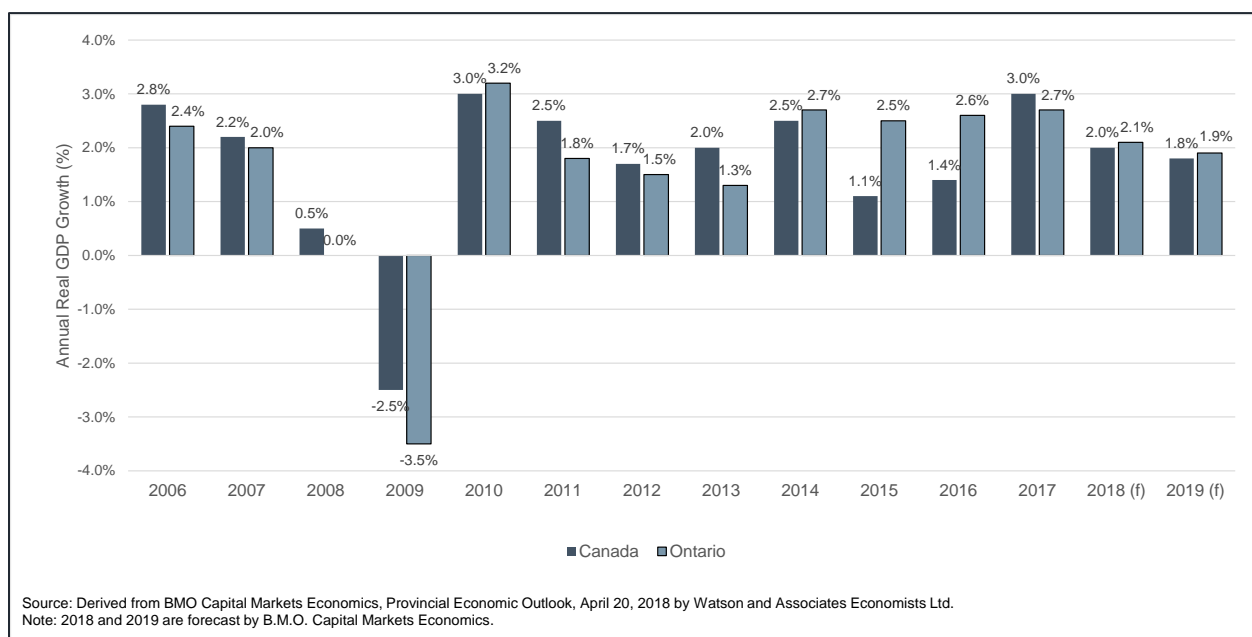
The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by G.D.P. (gross domestic product) output, has shifted from the goods-producing sector (i.e. manufacturing and primary resources) to the services-producing sector. Much of this shift has occurred during the past two decades, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. In contrast, service-based sectors such as financial and business services have seen significant increases over the past several years.

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, industrial processes have become more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.



Over the past decade, the Ontario economy has experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery has been relatively slow to materialize. That said, provincial G.D.P. levels have sharply rebounded since 2014 and are forecast to remain above the national average in 2018/2019, as illustrated in Figure 5-7. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector which has been fueled by a lower-valued Canadian dollar and the gradual strengthening of the U.S. economy.¹ Looking forward, provincial G.D.P. growth is anticipated to ease from just over 2% in 2018 to approximately 1.3% by 2020, largely as a result of a tightening labour market and slowing global economic growth.²

Figure 5-7
Annual Real G.D.P. Growth, Ontario and Canada
Historical (2008 to 2016), Ontario Estimate (2017) and Forecast (2018 to 2019)



While the performance of the Ontario economy is anticipated to remain positive over the near term, there are potential risks to the national and provincial economies that are important to recognize. This includes risks with respect to the adoption of protectionist trade measures in the U.S., as well as other proposed changes to U.S. fiscal and industrial policies. Domestically, the housing market continues to pose a risk to the

¹ Valued at approximately \$0.74 U.S. as of April, 2019.

² Royal Bank of Canada. Provincial Outlook. December 2018.



overall economy. The sharp rise in Ontario's housing prices – particularly in the G.T.A. – has contributed to record consumer debt loads and eroded housing affordability. Ontario household debt reached record levels in 2016 at 171% of disposable income, and the share of income required to service debt payments is expected to increase, as the Bank of Canada hiked the benchmark interest rate three times from July 2017 to January 2018 to reach 1.25%. The resultant increased debt payments may force consumers to scale back on other spending and potentially result in negative implications for the economy.¹

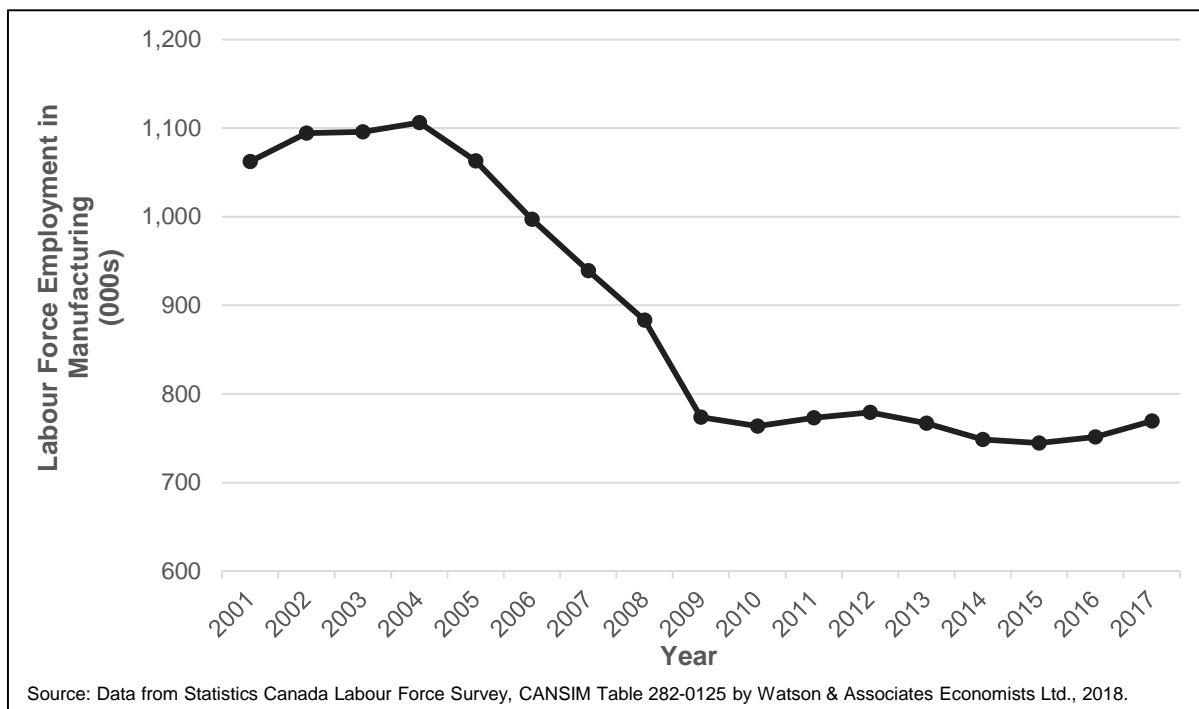
The trend towards more knowledge-intensive and creative forms of economic activity is evident across many sectors within both the broader national and provincial economies and within the G.G.H. economy. This trend includes growth in financial services, information technology, business services, health care and social services, government, advanced manufacturing, energy, information and cultural industries, education, training and research, agri-business and tourism. In planning for long-term growth, these sectors are anticipated to be amongst the key growth areas of the G.G.H. knowledge-based economy.

As summarized in Figure 5-8, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009. Between 2009 and 2017, provincial labour force levels stabilized in the manufacturing sector. Looking forward, modest labour force growth is anticipated in this sector across the Province of Ontario, as well as more regionally across the G.T.H.A.

¹ Economic and Budget Outlook. Financial Accountability Office of Ontario (F.A.O.). Assessing Ontario's Medium-Term Budget Plan. Spring 2018.



Figure 5-8
Manufacturing Labour Force Employment in Ontario, 2000 to 2017



5.4.1.2 G.G.H. Trends

The City of Barrie is located within one of the fastest growing Cities/Regions in North America, known as the G.G.H. In many respects Barrie's long-term economic growth potential is largely tied to the success of the G.G.H. as a whole. The G.G.H. represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. With a robust economy and diverse mix of export-based employment clusters, the G.G.H. is highly attractive on an international and national level to new businesses and investors. In turn, this continues to support strong G.G.H. population growth levels largely driven by international and inter-provincial net migration.

Collectively, the population for the entire G.G.H. is forecast to increase from 9.5 million in 2016 to 13.5 million in 2041, while the employment base is forecast to increase from 4.6 million in 2016 to 6.3 million in 2041. This represents a population increase of 4.0 million people (160,000 annually) and an employment increase of 1.7 million (68,000 annually). This represents a substantial increase in population and employment relative to other North American metropolitan regions of comparable population size.



Historically, population and employment growth rates have been somewhat stronger in the G.T.H.A. compared to the G.G.H. “Outer Ring.” Over, the 2011 to 2016 period, the G.T.H.A. achieved average annual employment growth of 1.7% compared to 1.4% in the G.G.H. Outer Ring. Having said that, employment growth rates in some industrial sectors and select “knowledge-based” sectors typically accommodated on employment lands, have generally been stronger in the G.G.H. Outer Ring than in the G.T.H.A. As illustrated in Figures 5-9 and 5-10.

Figure 5-9
Greater Golden Horseshoe Employment Growth
by Select Industrial Sector, 2011 to 2016

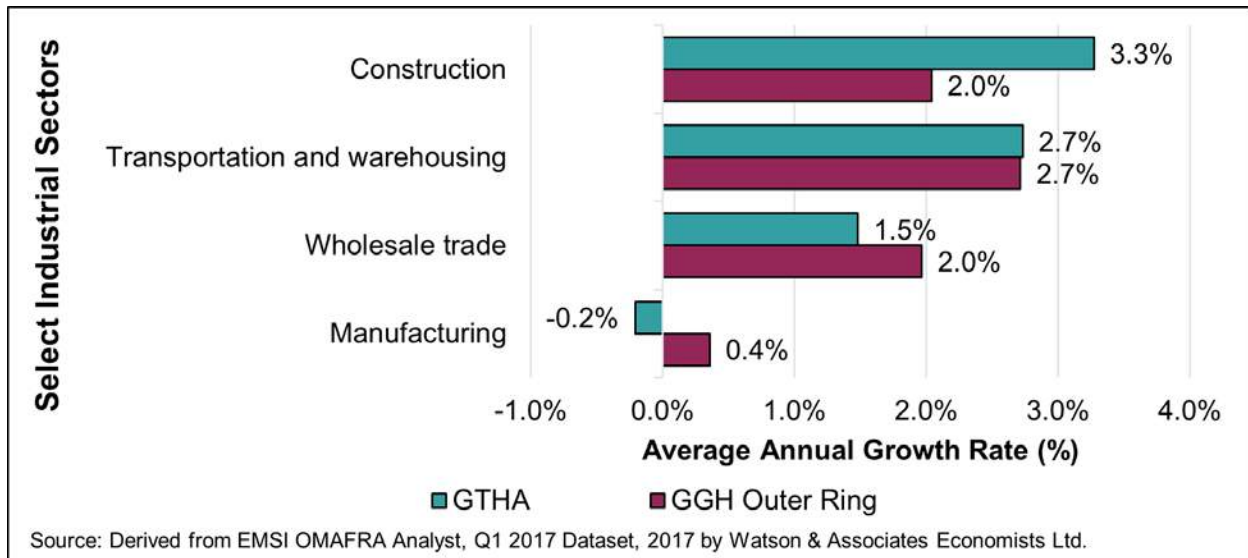
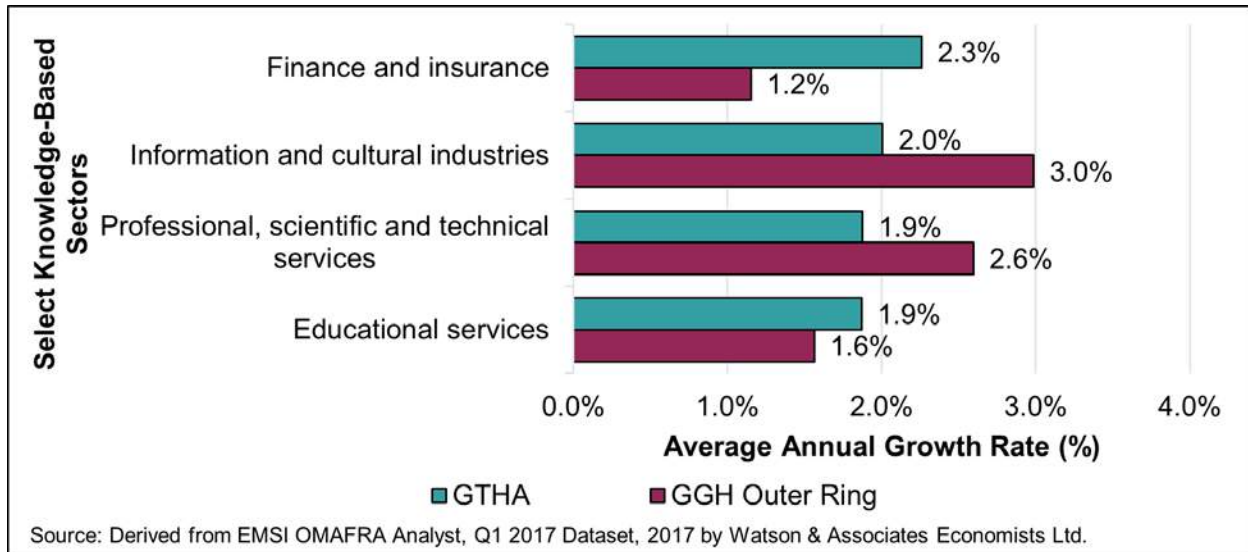




Figure 5-10
Greater Golden Horseshoe Employment Growth
by Select Knowledge-based Sector, 2011 to 2016



Over the 2018 to 2041 planning horizon, the share of population and employment growth within the G.G.H. is forecast to continue to steadily shift from the most populated urban municipalities of the G.T.H.A.¹ to the municipalities within the “G.T.H.A. countryside” and the outer G.G.H.² Overall, employment growth within the G.G.H. Outer Ring is forecast to grow at a slightly faster rate than in the G.T.H.A. over the 2016 to 2041 period.³

Over the past decade, employment lands development in the G.G.H. has been highly concentrated in southwest York Region and the west G.T.H.A. (Peel and Halton Regions). Figure 5-11 illustrates recent annual employment lands absorption trends by select G.G.H. municipality over the 2013 to 2017 period. As shown, employment lands absorption has been strongest in Milton, Cambridge and Halton Hills with absorption

¹ Includes the City of Toronto, City of Hamilton, City of Burlington, Town of Oakville, City of Mississauga, City of Brampton, City of Vaughan, City of Richmond Hill, City of Markham, City of Pickering, Town of Ajax, Town of Whitby and the City of Oshawa.

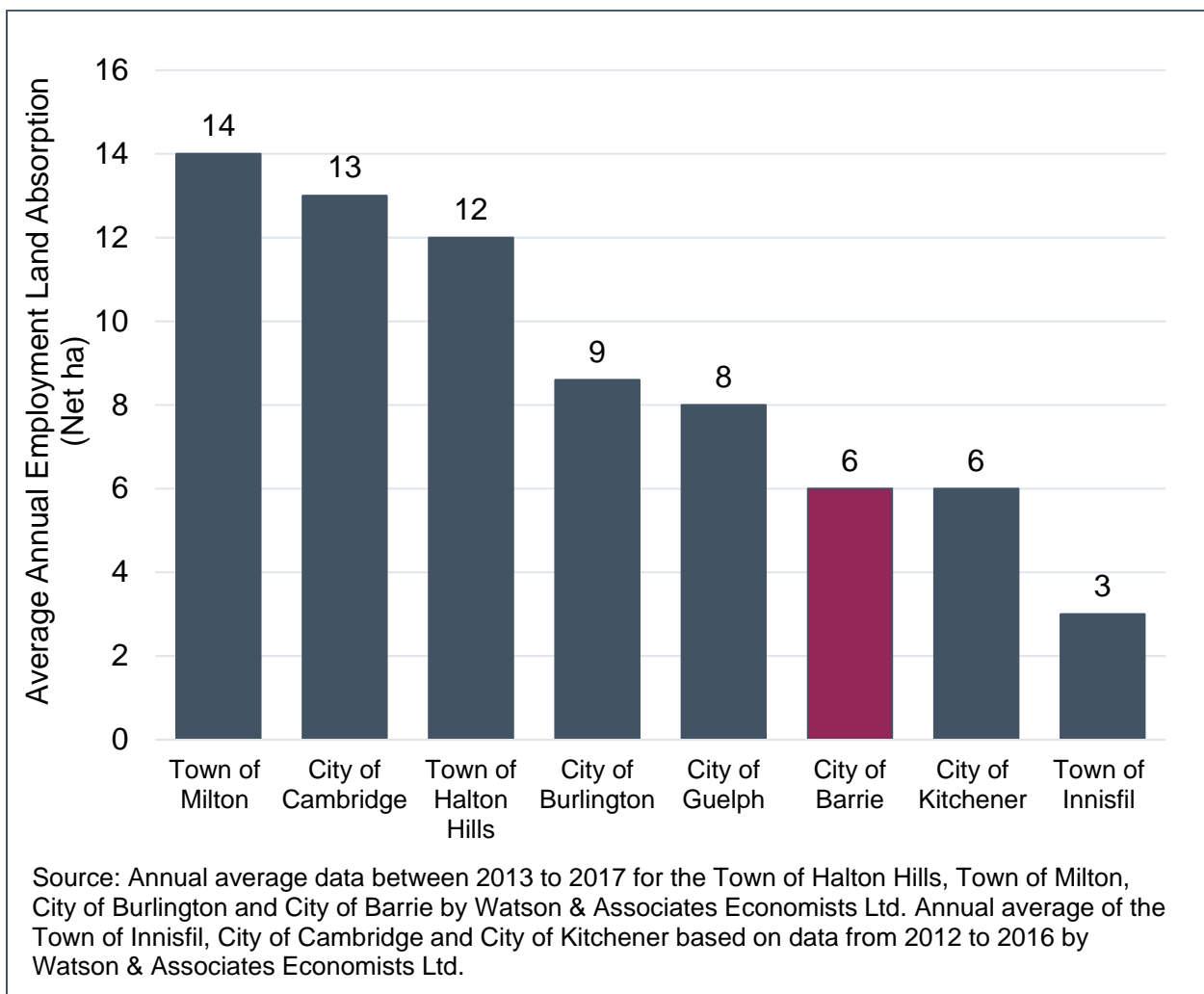
² Reflects all remaining G.T.H.A. municipalities not listed in the above footnote.

³ Based on 2041 employment growth targets identified in the Growth Plan for the Greater Golden Horseshoe, the G.T.H.A. is expected to average 0.8% annual employment growth over the 2016 to 2041 period compared to 0.9% in the G.G.H. Outer Ring.



averaging between 12 and 14 net ha per year (30 and 35 net acres), respectively. Employment lands absorption in Burlington, Kitchener, Guelph and Barrie has been more moderate, ranging between 6 and 9 net ha (15 and 22 net acres) per year. The City of Barrie's annual absorption (6 net ha/15 net acres annually) is approximately double the annual average of the Town of Innisfil (3 net ha/7 net acres annually).

Figure 5-11
Select Municipalities in G.G.H.
5-Year Average Annual Employment Land Absorption (Net ha)
2013 to 2017



Based on a review of vacant employment land supply in municipalities within the regional market area, the Town of Innisfil (Innisfil Heights Employment Area) and the Town of Bradford West Gwillimbury (Bradford West Gwillimbury Strategic Employment



Area) have approximately 62 net ha (153 net acres) and 307 net ha (759 net acres), respectively, of designated vacant employment lands situated along the Highway 400 corridor.¹ These lands are identified in the Places to Grow, Growth Plan, 2019 as a Strategic Employment Settlement Area.

The Innisfil Heights Employment Area and the Bradford West Gwillimbury Strategic Employment Area are situated along the Highway 400 corridor and are expected to provide opportunities to accommodate employment lands development over the forecast horizon. In order for the City of Barrie to achieve its employment growth forecast over the Growth Plan, 2019 horizon, the City will need to ensure that it has an appropriate amount of designated, serviced and serviceable employment lands to meet anticipated long-term demands of industry and to maintain its competitive position in the broader regional market area.

5.4.2 City of Barrie Employment Land Absorption Trends

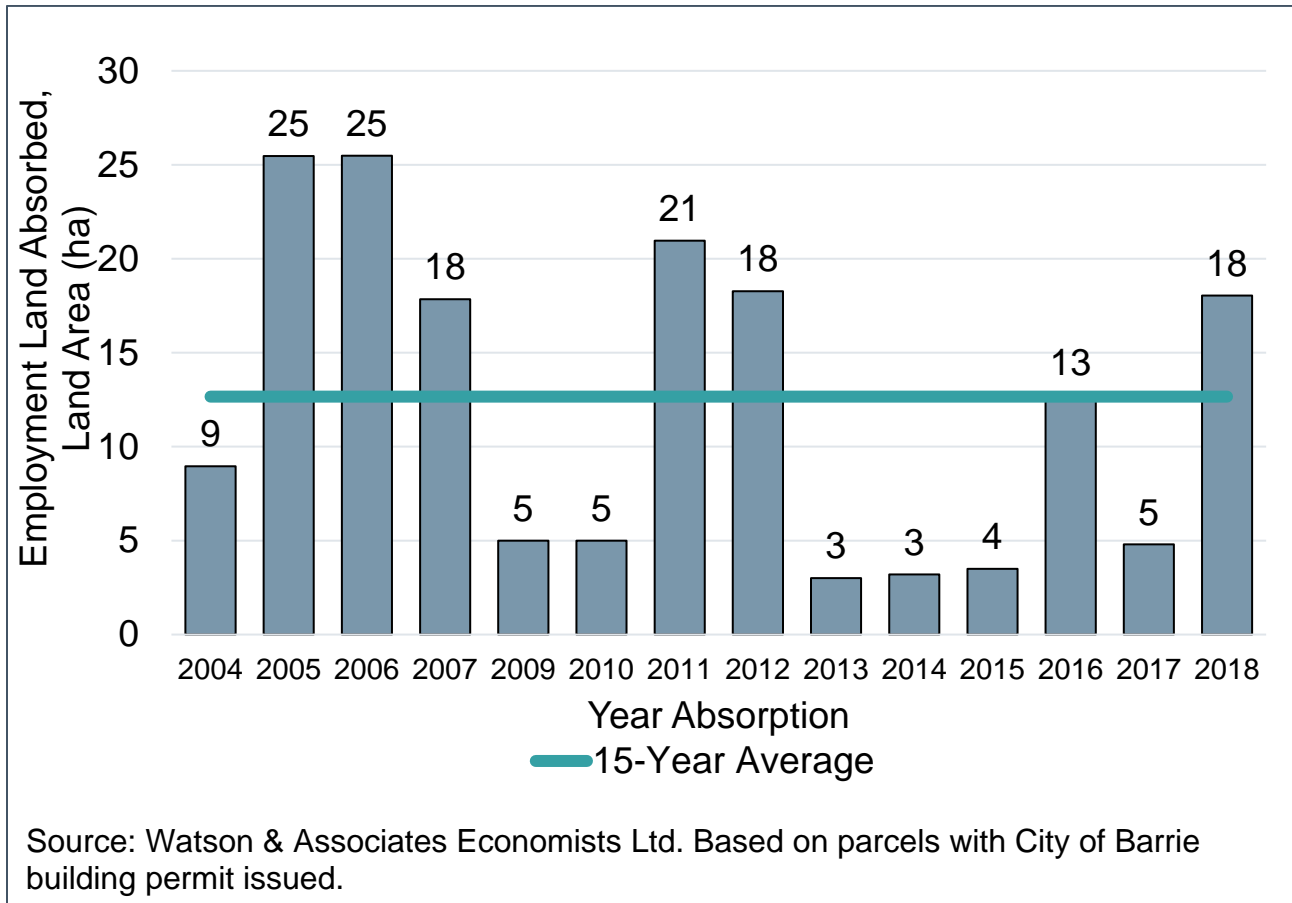
As summarized in Figure 5-12, over the 15-year period 2004 to 2018, annual land absorption on employment lands in the City of Barrie averaged 13 ha (32 acres) annually. Over the past five years, land absorption on employment lands has averaged approximately 8 ha (20 acres) annually. While employment land absorption has been relatively low over the last five years, it is important to note that recent demand within the City of Barrie has been constrained by a lack of serviced (e.g. shovel-ready) employment land, particularly larger sites (i.e. greater than 5 ha (12 acres)).

Over the past five years, while the designated Employment Areas within the Salem Secondary Plan has been added to the supply of the City's vacant designated employment lands, there has been limited shovel-ready employment land added to the City's inventory to accommodate demand. Over the forecast horizon, it is reasonable to assume that additional serviced employment land added to the City will provide greater choice in the market and lead to greater land absorption levels.

¹ Based on previously work completed by Watson & Associates Economists Ltd.



Figure 5-12
City of Barrie
Annual Employment Land Absorption
2004 to 2018



Based on our review of absorption over the past 15 years,¹ the following are key characteristics of development on absorbed employment lands:

- Recent development on absorbed parcels has generally consisted of developments with moderate to high building coverages (ratio of building gross floor area to parcel land area). Average building coverage on absorbed employment lands has averaged 27%, and only 5 sites (totalling 10 ha/25 acres) had building coverages of less than 20%;

¹ Review based on absorption over the 2003 to 2017 period. Development and built-form of land absorbed in 2018 is unknown.



- The majority of the absorbed parcels have been small parcels of less than 2 ha (5 acres) as summarized in Figure 5-13;
- As summarized in Figure 5-14, one-third of the land absorbed over the past 15 years has accommodated multi-tenant commercial/industrial buildings that typically support small and medium-sized industrial, office and commercial services operations;
- Four data centres¹ (data storage/IT support centres) have been built in the City of Barrie over the past 15 years, representing approximately 20% of the absorbed land area over that period;
- Traditional industrial sectors such as manufacturing and logistics/wholesale operations have represented a smaller portion of absorbed employment lands in the City of Barrie relative to other markets in the G.G.H.; and
- The majority of the employment land absorbed in the City of Barrie has included uses that could be accommodated on more prestige employment uses, such as Highway 400 Industrial and Business Park. While the majority (83% of the land area) of employment land absorption has occurred on lands designated General Industrial, only 12% of the total absorbed land over the past 10 years has included development with on-site storage or truck parking.²

Over the past 15 years, four parcels were absorbed with a land area larger than 5 hectares (12 acres).³ Since 2012, absorption on employment lands has consisted of small and medium-sized parcels measuring less than 5 ha (12 acres) in land area. While absorption has been more modest on larger parcels in the City's Employment Areas, the supply of shovel-ready large parcels has diminished. In order for the City to accommodate larger industries over the forecast horizon, the City will need to ensure it provides a range of larger sites to allow for sufficient market choice as to not unduly constrain demand.

¹ Data centres operated by the Bank of Montreal, TD Bank, IBM and Cogeco.

² According to the City of Barrie Official Plan (Policy 4.4), the General Industrial designation permits on-site storage, while Highway 400 Industrial permits on-site storage with appropriate screening and landscaping addressed through Site Plan Control. The Business Park designation does not permit on-site storage. allow for open storage activities subject to the appropriate screening and landscaping, which will be addressed through Site Plan Control.

³ Development on these large industrial sites (5 hectares/12 acres and larger) consisted of three data centres and a large manufacturing operation.



Figure 5-13
City of Barrie
Land Absorption by Parcel Size Range
Count of Parcels
2003 to 2017

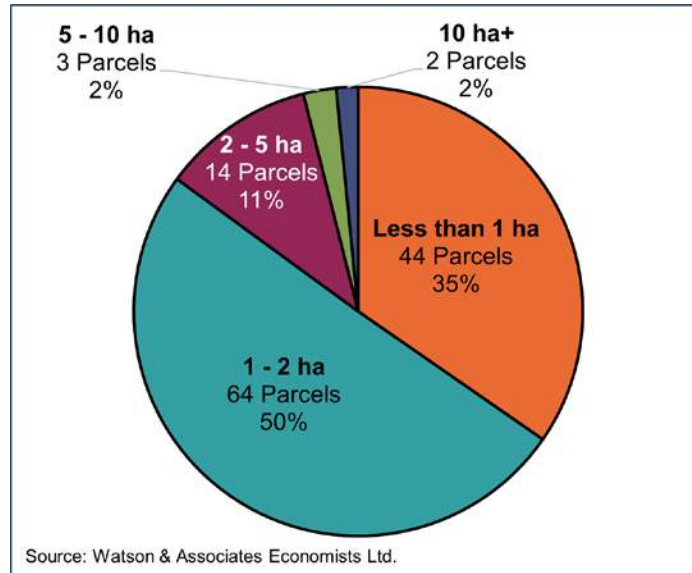
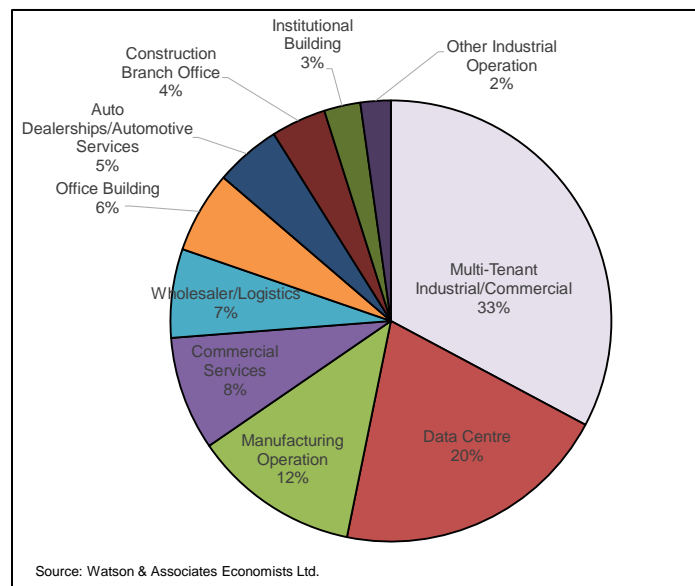


Figure 5-14
City of Barrie
Land Absorption by Built-Form
2003 to 2017





5.4.3 City of Barrie Employment Land Development Characteristics

Based on historical development activity on absorbed employment lands, the City of Barrie's Employment Areas have accommodated these business sectors in the following built-forms and associated site characteristics:

Multi-Tenant Industrial Buildings

Multi-tenant industrial buildings in Barrie's Employment Area have accommodated small to medium-sized advanced manufacturing operators, small-food processing operators and technology firms. Multi-tenant buildings are typically small sites (averaging 1.2 hectares (3 acres)) with a high building coverage relative to other industrial uses. Over the past 15 years, the average multi-tenant building was approximately 2,790 sq.m (30,000 sq.ft.) in terms of Gross Floor Area (G.F.A.) and a number of these buildings included high truck loading bays and 1- to 2-storey office units.

Small-Scale Manufacturing Buildings

Small manufacturing buildings of up to 4,650 sq.m (50,000 sq.ft.) of G.F.A. and land area of up to 3 ha (7 acres) have accommodated a range of manufacturers, including advanced manufacturing and food processing operations.

Specialized Buildings – Data Centres

The City's four data centres have been accommodated on parcels ranging in land area from 2 to 15 ha (5 to 37 acres) with prestige single-storey or multi-storey prestige industrial buildings ranging in size from 5,580 to 30,660 sq.m (60,000 to 330,000 sq.ft.) G.F.A. Data centres are comprised of computer labs and office space, as well as a large portion of building space devoted to storage and equipment (e.g. industrial cooling systems), characterized of industrial buildings.



Figure 5-15
City of Barrie
Selected Developments on Employment Lands



Bank of Montreal Barrie Computing
Customer Data Disaster Recovery Centre
Centre (Data Centre); 50 Reid Drive
GFA: 30,660 sq.m (330,000 sq.ft.)
Land Area: 10 ha (25 acres)



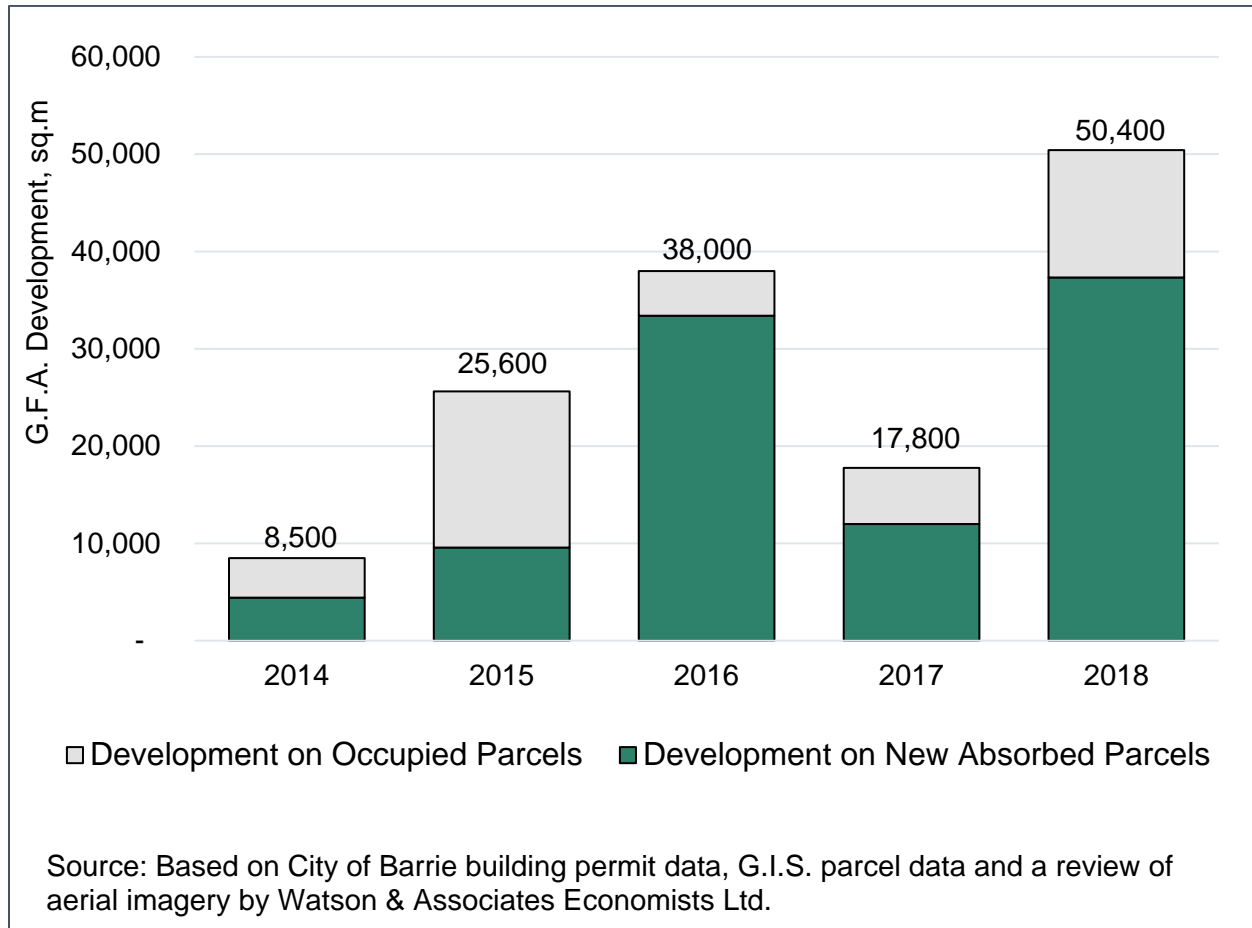
Multi-Tenant Industrial Building (2-storey)
353 Saunders Road
GFA: 4,650 sq.m (50,000 sq.ft.)
Land Area: 1 ha (2.5 acres)

Development Activity on Employment Lands – New Absorbed Parcels and Occupied Parcels

As summarized in Figure 5-16, over the past five years, building development on the City's employment lands has averaged 28,600 sq.m (308,000 sq.ft.) annually. Vacant employment lands have accommodated the majority of G.F.A. development activity on employment lands, representing approximately 69% of the G.F.A. development on employment lands over the past five years. The remaining 31% of G.F.A. on employment lands has consisted of development on parcels already occupied (expansions of existing facilities, additional buildings added). New buildings added to parcels typically have included the development of industrial multi-tenant plazas and phased development, as well as the expansion of a wide-range of industrial operations.



Figure 5-16
City of Barrie
G.F.A. Development on Employment Lands
2004 to 2018



5.5 City of Barrie Employment Land Supply

5.5.1 Introduction

This section summarizes the supply of gross and net vacant, designated employment land by area within the City of Barrie. In generating this inventory, all parcels designated in the City’s O.P. as “Highway 400 Industrial,” “Business Park,” “General Industrial,” and “Restricted Industrial” have been reviewed. The analysis was completed primarily through a desktop review using geographic information systems (G.I.S.)

Total Vacant Employment Land Supply as of January 1, 2018
Gross: 526 ha Net: 444 ha



mapping software. Spatial overlays utilized to develop the land supply inventory included parcel fabric, land-use layers (including the City of Barrie Official Plan Schedules A and B), non-residential building permit data, building footprints, hydrology/wetlands and orthophotos. Employment lands are considered developed if a building permit has been issued for a development on a site as of December 31, 2017.

It is important to note that the employment land supply has been carried out in accordance to the guidelines in the Growth Plan, 2019 and the L.N.A. Methodology. As summarized in Figure 5-17a, the City of Barrie had approximately 526 gross hectares (444 net ha) of vacant employment land as of January 1, 2018.

5.5.2 Summary of Vacant Employment Lands Inventory

The L.N.A. Methodology requires the municipality to identify “Built Employment Areas” separately from “Newly Developing Employment Areas,” as such Figure 5-17a summarizes the vacant designated employment land supply by the two area types. Generally, Built Employment Areas include older Employment Areas, while Newly Developing Employment Areas include areas that are recently designated but currently unbuilt. The purpose of this distinction is to recognize the potential differences in employment density, future built-form and land-use, and intensification opportunities. The L.N.A. Methodology does not require the identification of designated Employment Areas that are within a delineated greenfield area for the purposes of summarizing the employment land supply and calculating employment land needs.

Within the City of Barrie context, Newly Developing Employment Areas include the designated Employment Areas within the Salem Secondary Plan Area, while the remaining Employment Areas are categorized as Built Employment Areas. As summarized in Figure 5-17a, the Newly Developing Employment Areas (lands within the Salem Secondary Plan area) represent approximately one-third of the gross supply or 181 gross ha (447 gross acres). Within the Newly Developing Employment Areas, there are two Official Plan designations, Highway 400 Industrial and General Industrial. Vacant land within the Built Employment Area include four O.P. designations: Highway 400 Industrial, Business Park, General Industrial, and Restricted Industrial, totalling approximately 345 gross ha (852 gross acres).



Figure 5-17a
City of Barrie
Vacant Employment Land by Designation and Area
as of January 1, 2018¹

Land Supply by Area and Official Plan Designation ¹	Designated Vacant Land Area		Net to Gross (%)
	Gross ha ²	Net ha ³	
Built Employment Areas - Excludes Salem Secondary Plan Area	345	300	87%
Highway 400 Industrial	8	8	
Business Park	14	12	
General Industrial	320	276	
Restricted Industrial	3	3	
Newly Developing Employment Areas - Salem Secondary Plan Area⁴	181	145	80%
Highway 400 Industrial	77	62	
General Industrial	103	83	
Total Designated Employment Land Supply	526	444	84%
Highway 400 Industrial	86	70	
Business Park	14	12	
General Industrial	424	359	
Restricted Industrial	3	3	

Source: Watson & Associates Economists Ltd.

1. Excludes sites identified for conversion.
2. Net of environmental features.
3. Net developable land area based on 80% gross to net for large unsubdivided parcels larger than 10 ha. Overall net to gross average for the City of Barrie is 84%.
4. Derived from City of Barrie Official Plan Schedules 8A and 8C.

As summarized in Figure 5-17b, a large share of the City's Employment Areas is designated as General Industrial in both the Built Employment Areas and the Newly Developing Employment Areas. Employment Areas planned for more prestige industrial uses (Business Park and Highway 400 Industrial designations) are largely concentrated in the City's Newly Developing Employment Areas (within the Salem Secondary Plan Area).

¹ Based on parcels that are vacant and have no building permit issuance as of December 31, 2017.



Figure 5-17b
City of Barrie
Vacant Employment Land by Designation and Area
as of January 1, 2018¹

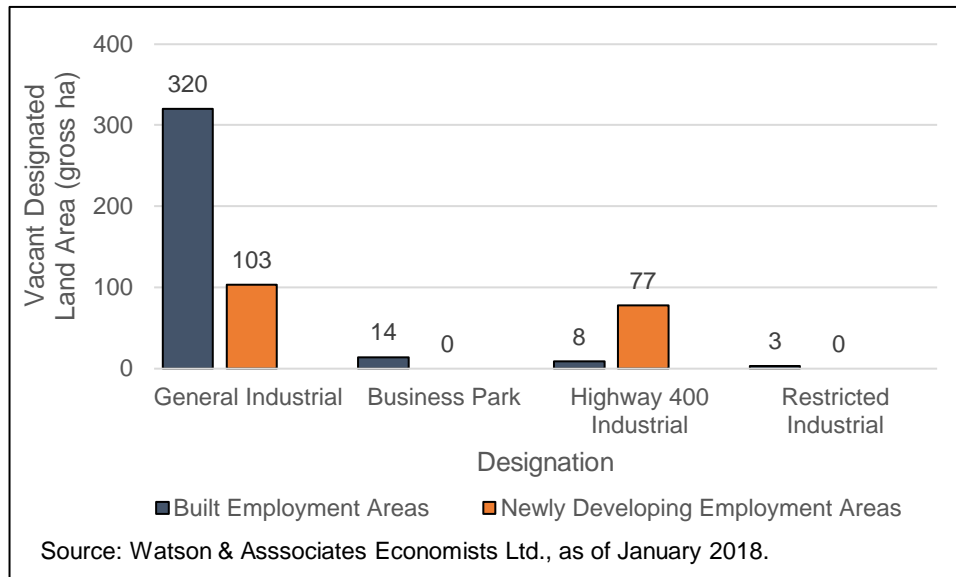


Figure 5-18a maps the designated Employment Areas by O.P. designation and the Salem Secondary Plan Area (outlined in a green polygon). Vacant employment parcels have been identified with an overlay on the map (red cross-hatch overlay). For greater clarity, Figure 5-18b includes a map with only vacant sites by O.P. designation.

The vacant employment land supply has been adjusted to reflect four potential employment conversion sites, totalling 24 hectares (10 acres). Details and the location of these sites are provided in section 5.8.

¹ Based on parcels that are vacant and have no building permit issuance as of December 31, 2017.



Figure 5-18a
City of Barrie
Employment Land by Designation and Area
as of January 1, 2018

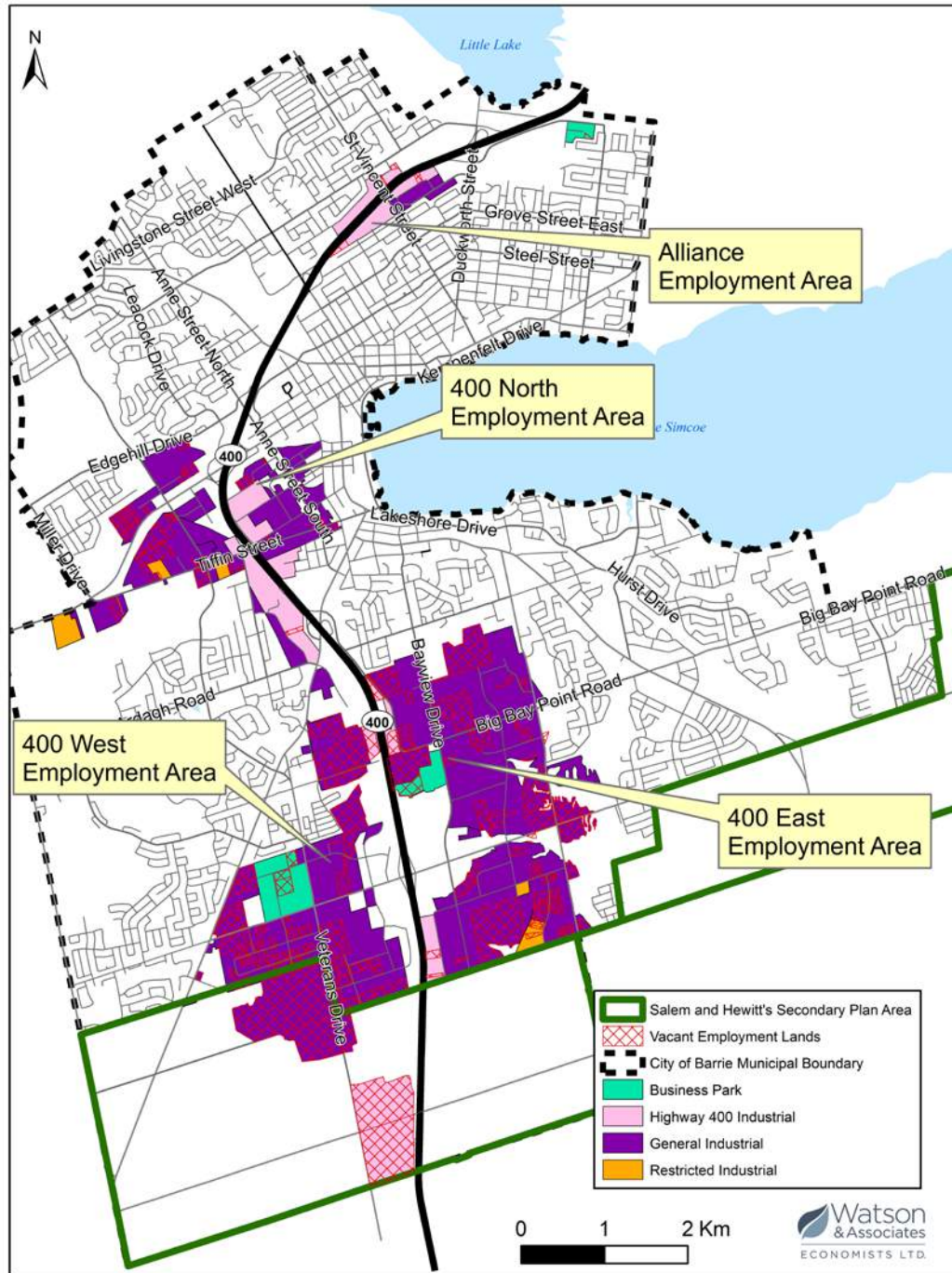
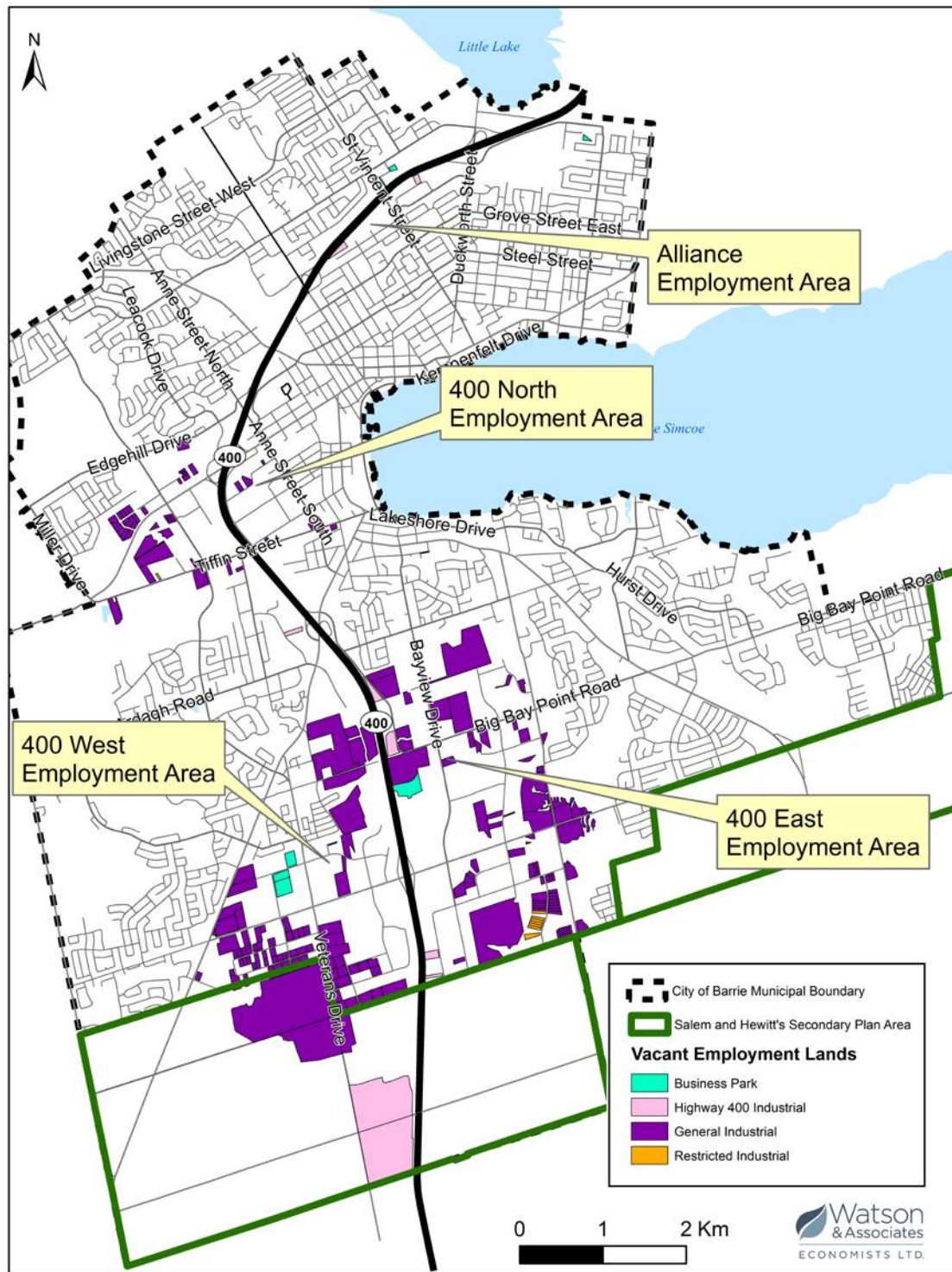




Figure 5-18b
City of Barrie
Employment Land by Designation and Area
as of January 1, 2018





5.5.3 Summary of Vacant Serviced and Unserviced Employment Lands

In accordance with water and wastewater servicing G.I.S. data provided by the City of Barrie, vacant employment lands that are shovel-ready and have the potential to develop within a short term (i.e. within approximately 6 months) have been identified. Shovel-ready lands and the remaining designated vacant employment lands are identified in Figure 5-19. Lands identified as shovel-ready in Figure 5-19 include lands which abut an arterial, collector or local road and have water and wastewater servicing near the property line.¹

Figures 5-20 through to 5-22 summarize the vacant land supply by servicing status, location and parcel size. Key highlights include the following:

- As summarized in Figure 5-20, the City has approximately 38 gross ha (94 gross acres) that is serviced and within 1 km (7 gross ha is within 500 metres and 31 gross ha is within 500 metres to 1 km) of a Highway 400 Interchange;
- The majority (181 gross ha or 447 gross acres) of the City's unserviced land (250 gross ha or 618 gross acres) is within the Salem and Hewitt's Secondary Plan;
- It is estimated that there are 276 gross ha (682 acres) of shovel-ready employment lands in Barrie comprises 53% of the vacant designated employment land area, as summarized in Figure 5-21;
- The City's serviced vacant employment land supply, approximately just under half (47%), is comprised of parcels less than 2.5 gross ha (6 gross acres); and
- The City has 8 serviced vacant employment land parcels which comprise nearly one-third of the City's serviced vacant employment land supply.

Total Vacant Serviced Employment Land Supply Serviced as of January 1, 2018

276 gross ha (682 acres) or 53% of the City's designated Employment Areas are "shovel-ready."

Further details of the vacant employment land supply by servicing is provided in Appendix B, including details of the supply by City planning policy area (D.G.A. and B.U.A.).

¹ Assessment is based on a desktop review utilizing G.I.S. data and provides a directional estimate.



Figure 5-19
City of Barrie
Vacant Employment Land by Servicing Status and Location
to an Existing Highway Interchange
as of January 1, 2018

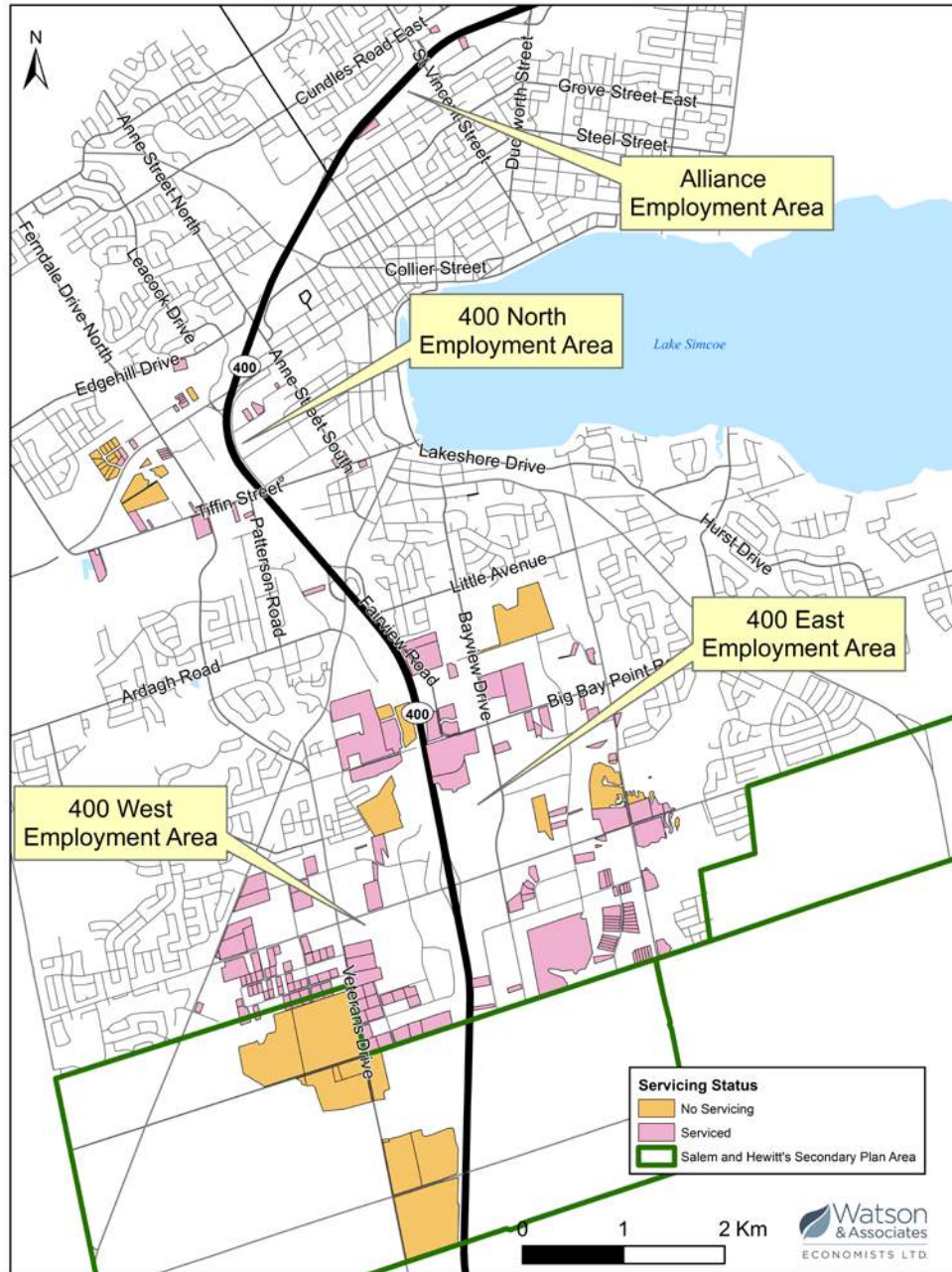




Figure 5-20
 City of Barrie
 Vacant Employment Land by Servicing Status and Location
 to an Existing Highway Interchange
 as of January 1, 2018

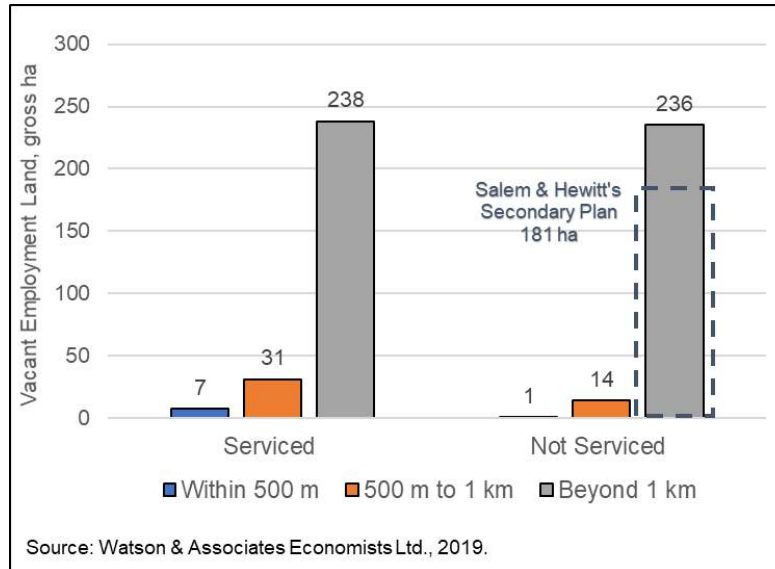


Figure 5-21
 City of Barrie
 Vacant Employment Land by Servicing Status
 as of January 1, 2018

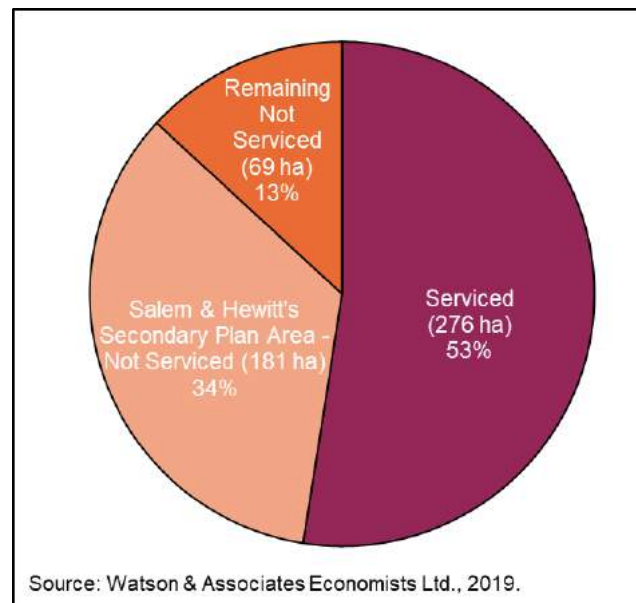
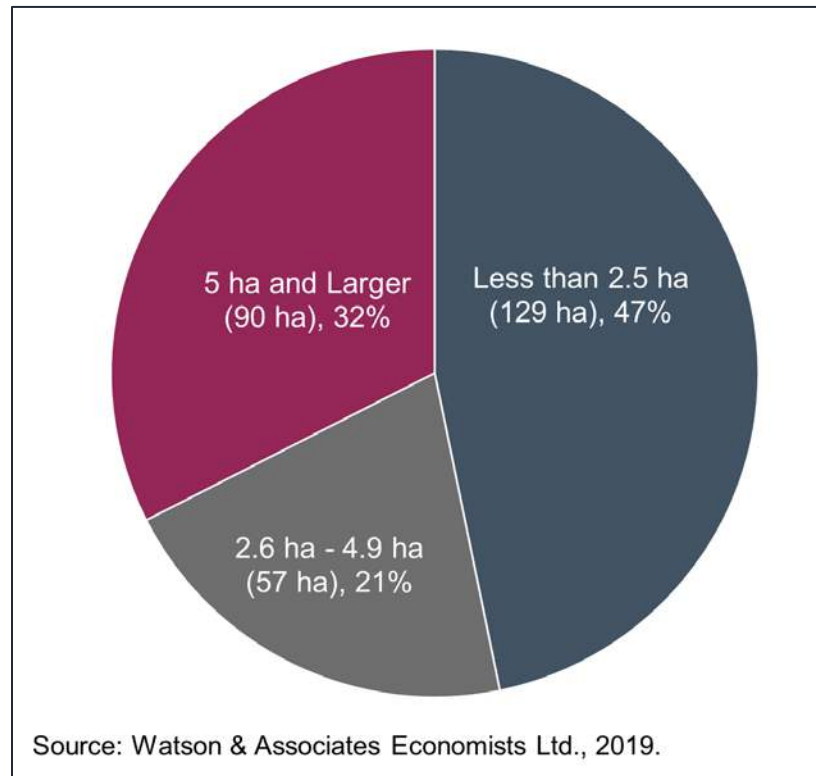




Figure 5-22
City of Barrie
Serviced Employment Land by Parcel Size Range
as of January 1, 2018



5.5.4 Intensification Opportunities on Employment Lands

Given the large number of established industrial areas in Barrie, a wide array of opportunities exists for intensification. Intensification can take on a number of forms, including development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of occupied sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization resulting in higher employment density on developed employment lands. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g. roads, water/sewer servicing), and a built form that is more conducive to support public transit, resulting in communities that are more functional and complete.



Through a high-level desktop review using the developed industrial parcel inventory, building footprints and orthophoto overlays, 207 ha (512 acres) of Barrie's developed employment lands were identified as underutilized. This reflects parcels that have:

- A vacant portion (potential for severance or building expansion);
- Relatively low building coverage (ratio of building space to land area is less than 20%) or sites that are currently used exclusively for storage and/or parking; and
- Redevelopment sites that are derelict, abandoned or underutilized built sites.

A further review was completed to categorize underutilized lands according to potential:

- No Potential – sites are unlikely to redevelop over the forecast horizon (e.g. lands with no access to existing or planned roads, sites are utilized for municipal infrastructure/public works facilities);
- Low Potential – opportunity only for expansion to existing operations on-site (i.e. can't accommodate severances or another site opportunity due to lot configuration) or redevelopment; and
- High Potential – sites can accommodate a wide-range of development opportunities including either an expansion of existing operation or accommodating an additional business operation on site.

Opportunities for infill development and building expansion are present within the City's existing Employment Areas. As summarized in Figure 5-23, 10 sites totalling 57 ha (141 acres) have the highest potential for intensification, including opportunities for facility expansions or the development of another business operation (i.e. severance). Intensification of these sites would increase employment densities and generate higher utilization of developed employment lands. Sites with low potential for intensification, identified in Figure 5-23, include 32 sites totalling 99 ha (245 acres). As previously mentioned, low potential sites due to parcel configuration are likely unable to accommodate additional business operation opportunities (i.e. through severances).

Intensification Potential on Employment Lands

**10 sites totalling 57 ha
(141 acres) have the a
relatively high potential
for intensification.**



Figure 5-23
City of Barrie
Underutilized Parcels Based on Intensification Potential

Intensification Opportunity	Sites	Land Area, ha
No Opportunity	6	51
Low Potential	32	99
High Potential	10	57
Total	48	207

Source: Based on a desktop review by Watson & Associates Economists Ltd.

Identifying and evaluating intensification opportunities against market demand is challenging. The intensification potential of the underutilized industrial lands will largely be determined by future development plans of existing or future landowners, which is highly speculative. As discussed in section 5.3, over the past five years (2014 to 2018), the City has seen modest development activity in expansions/additions on employment lands in Barrie, comprising one-third of total non-residential building activity. Having said that, redevelopment activity has been relatively limited historically and there have been no examples of major redevelopments on underutilized employment lands within the City of Barrie over the past five years.

Infill and redevelopment of existing developed lands is expected to continue to increase over time, largely driven by rising industrial land values and the continued buildout of the City's designated employment lands. Based on recent trends in intensification and the likely redevelopment of intensification opportunities identified, it is anticipated that 8% of Barrie's employment growth on employment lands over the 2018 to 2041 period will

Intensification Demand on Employment Lands

It is anticipated that approximately 8% of Barrie's employment growth on employment lands over the 2018 to 2041 period will be accommodated through intensification.



be accommodated through intensification. This assumption is reflected in the employment land needs analysis summarized later in section 5.7.

Figures 5-24a, 5-24b and 5-24c provide maps of the underutilized sites. Appendix C provides further details on the sites.

Figure 5-24a
City of Barrie
Highway 400 West Employment Area
Intensification Opportunities

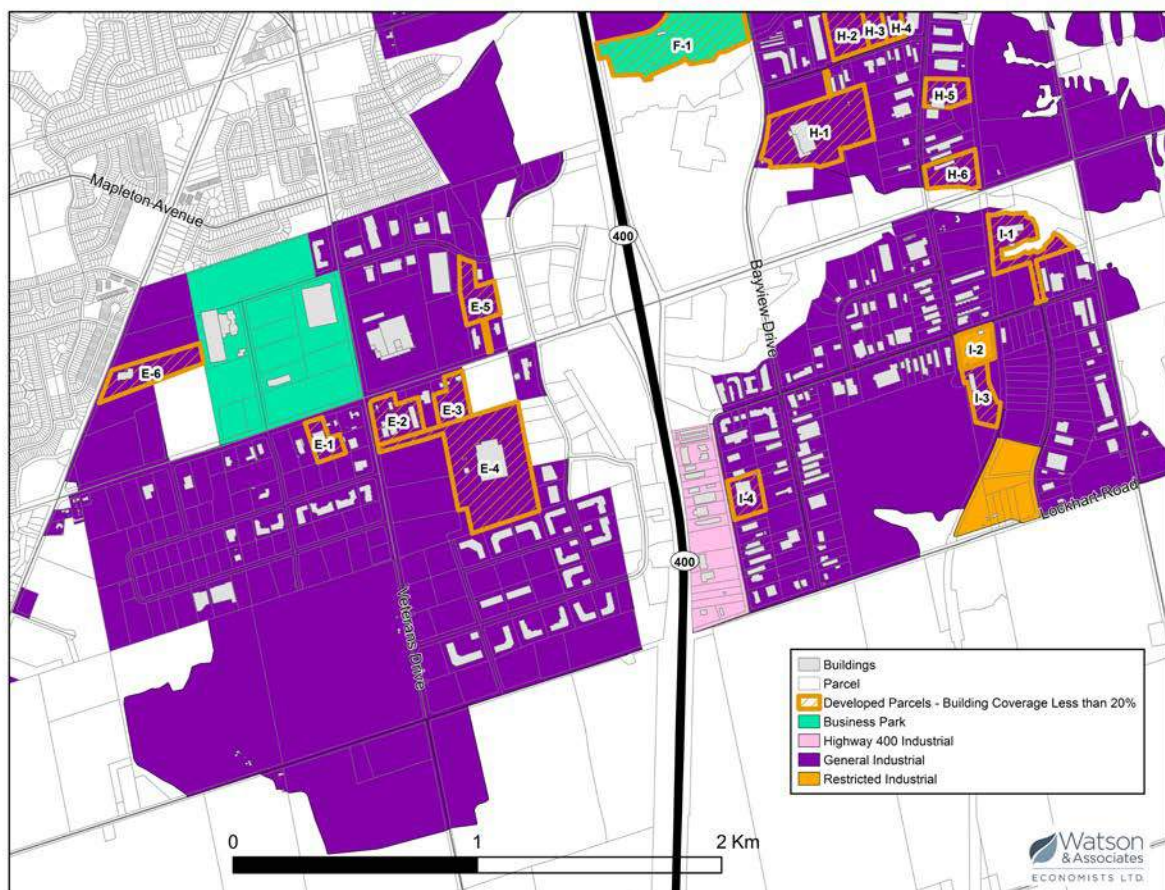


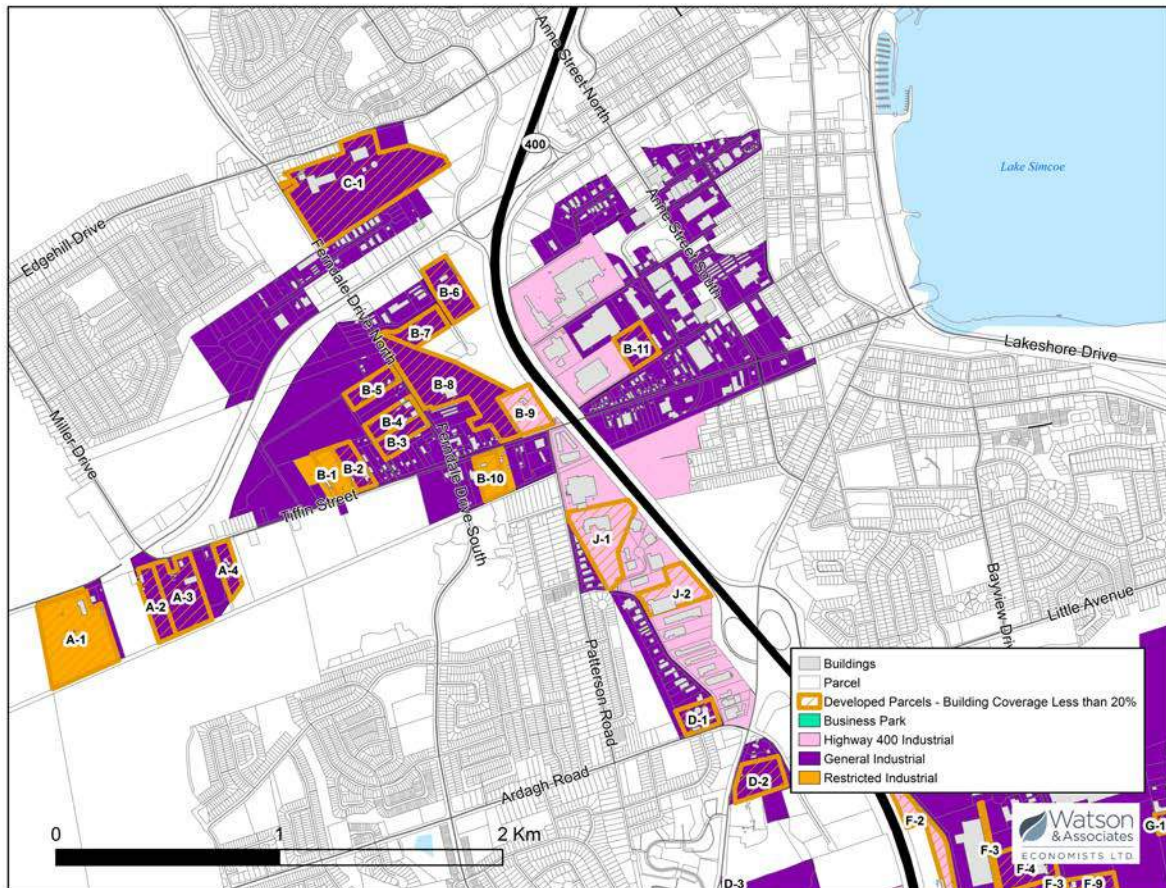


Figure 5-24b
City of Barrie
Highway 400 East Employment Area
Intensification Opportunities





Figure 5-24c
City of Barrie
Highway 400 North Employment Area
Intensification Opportunities





5.6 City of Barrie Long-Term Employment Forecast to 2041

5.6.1 Total Employment Forecast

In accordance with Schedule 3 of the Growth Plan, 2019, the City of Barrie's employment base is forecast to reach 129,000 jobs by 2041. Based on the City of Barrie's current employment base of 75,100 jobs as of 2018 and the Growth Plan, 2019 forecast of 129,000 jobs by 2041, the City of Barrie is forecast to add approximately 53,900 jobs, an annual growth rate of 2.4%.

Figure 5-25 summarizes the long-term employment forecast for the City of Barrie by total employment and employment activity rate¹ in comparison to recent historical trends. Since 2006, the City of Barrie's employment activity rate (ratio of local employees to population) has increased from 48.5% to 50.6%. Over the forecast horizon, the employment activity rate is forecast to remain relatively stable.

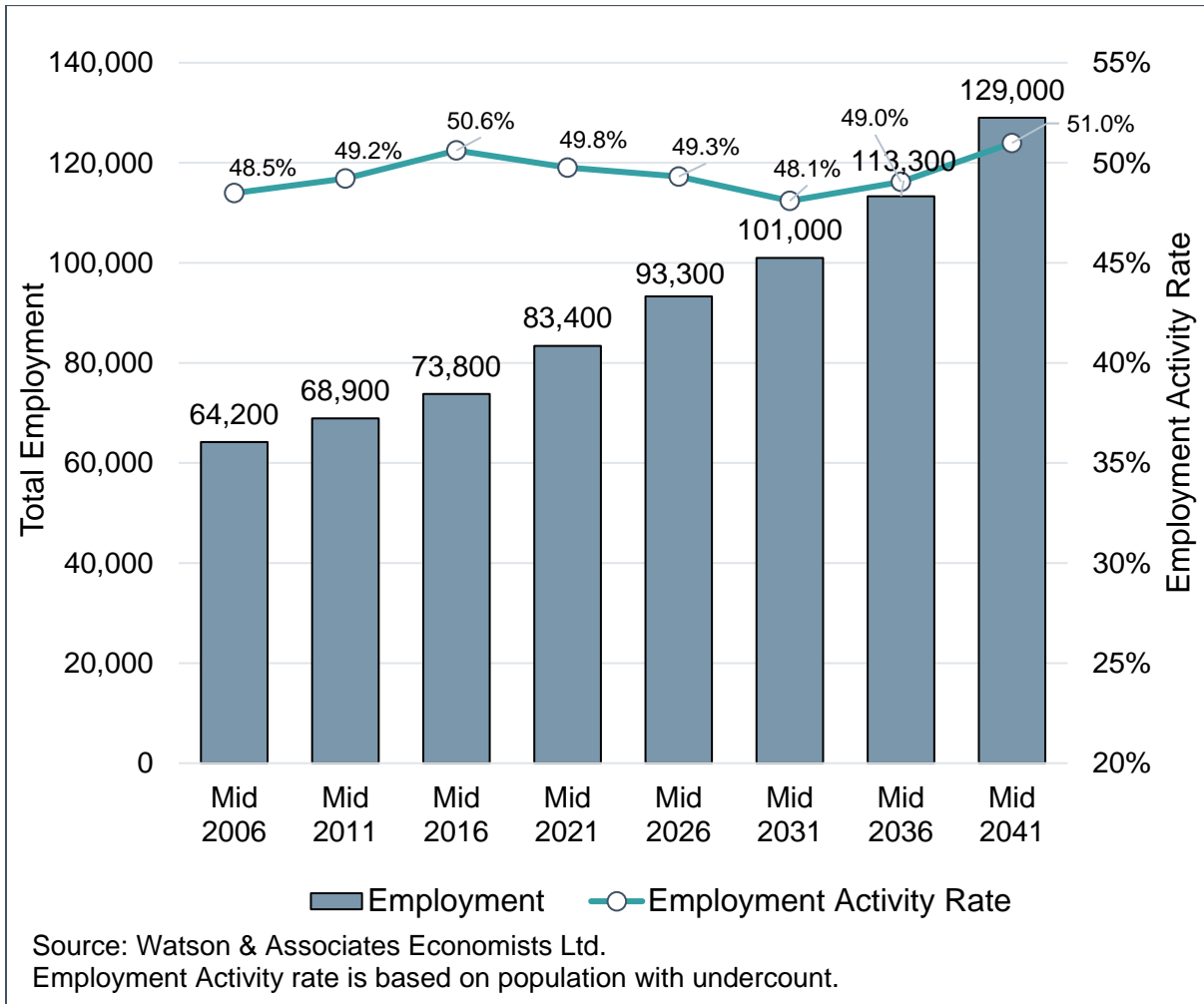
City of Barrie Employment Growth Forecast by 2041

By 2041, the City of Barrie employment base is forecast to reach 129,000 jobs. This represents an increase of approximately 53,900 jobs or an annual growth rate of 2.4%.

¹ Ratio of jobs to population.



Figure 5-25
City of Barrie
Employment Forecast 2041



5.6.2 Employment Forecast by Major Sector

The following provides an outlook of forecast employment trends by major employment sector and allocation of employment growth by sector and land-use type (Employment Area, rural area, population-related and major office).

5.6.2.1 Commercial/Population-Related Employment

Commercial/population-related employment includes employment in institutional and commercial sectors not accommodated in major office buildings. This primarily includes areas such as the downtown core, commercial corridors and nodes, neighbourhood



plazas, institutional campuses and schools, and standalone institutional and retail buildings. In addition, this category is also represents a component of Employment Areas for a more limited range of commercial uses. This employment category generally serves the local population base by providing convenient locations to local residents. Typically, as the population grows, the demand for this employment also increases to serve the needs of the City. Commercial uses within Employment Areas include a broad range of businesses that may require a facility with service bays and sufficient land for the storage of equipment, such as collision repair, research labs, technology businesses, engineering firms, and media production studios. Commercial uses with Employment Areas also include businesses that support the businesses and employees in the area (e.g. gas stations, equipment rentals, restaurants, fitness centres, convention centres, hotels, etc.).

Existing Commercial/Population-Related Employment in Barrie

- The City of Barrie is a major hub for commercial and institutional services for the Simcoe Area, as well as a service centre supporting Ontario’s “cottage country” area.
- Commercial/population-related employment in the City of Barrie is distributed across the City with concentrations of employment in the downtown, along the Highway 400 Corridor and the City’s major arterial roads (Mapleview Road, Bayfield Street and Essa Road).
- Commercial/population-related employment is also a component of the employment base within the City’s Employment Areas. Employment Areas accommodate approximately 15% of the City’s commercial/population-related employment (excluding major office employment), consisting of primarily small professional offices¹ and commercial services (e.g. recreational facilities, collision repair) that typically require larger lots than those found in the downtown core and retail plaza sites.

Major Disruptors and Opportunities for Commercial/Population-Related Employment

- The rise of E-commerce has influenced the demand for retail square footage, in particular the demand for retail goods. While E-commerce has been capturing

¹ Such as engineering offices, telecommunications operations and veterinarian offices.



market share from goods-based retailers, growth in service-based retailers continues as they provide social experiences and other services that cannot be purchased remotely. Service-based retailers¹ typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-based retailers are driving the intensification of power centre and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers.

5.6.2.2 Major Office Employment

Major office employment is comprised of employment accommodated in office buildings greater than 1,900 sq.m (20,000 sq.ft.).² Typically, major office employment includes the following sectors³ found in standalone multi-storey buildings:

- finance and insurance;
- information and cultural industries;
- management of companies;
- professional, scientific and technical services; and
- real estate, rental and leasing sectors.

It is important to note that not all office employment will be accommodated in major office buildings. It is anticipated that a portion of office employment will be accommodated in smaller-scale standalone office buildings (less than 1,900 sq.m

¹ Service-based retailer refers to retail establishments that primarily provide an on-site service or where goods are consumed on-site, including food services (e.g. restaurants and bars), personal care services (e.g. hair salon), commercial recreational uses (e.g. fitness centres and movie theatres) and automotive services. Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores and G.A.F.O.

² It should be noted that the definition of major office is based on the Land Needs Methodology for the Greater Golden Horseshoe (p.72) of 20,000 net square feet. This differs from the 4,000 sq.m size threshold that is used in the Growth Plan, 2019 policy for determining the size of buildings that must be located near existing or planned frequent transit.

³ NAICS codes 51, 52, 53, 54 and 55.



(20,000 sq.ft.)), and mixed-use buildings throughout the City, as well as multi-tenant commercial buildings on employment lands and in commercial areas.

Existing Major Office Employment in Barrie

- Currently, the City of Barrie has a small major office base of approximately 1,800 jobs accommodated in 17 office buildings.¹ Major office employment is primarily concentrated within the downtown area and along major arterials (Bayfield Street). There is also a small component of office employment in multi-tenant industrial and small freestanding office buildings within the City's Employment Areas.



Georgian Professional Centre,
125 Bell Farm Rd.
Photo Source: MLS CREA

Major Disruptors and Opportunities for Major Office

- Access to public transportation, in particular high-order transit, is a key driver of major office employment. Currently, the City of Barrie has limited connections to other public transit systems within the G.G.H. The City does offer GO Transit train service and bus service, however, with service primarily accommodating commuter traffic flow from the City of Barrie to the G.T.A. Competitively, the City is at a disadvantage in this regard in attracting major office employment.
- It is anticipated that the northerly expansion of the major office market in York Region, particularly the City of Vaughan, will provide opportunities for new office sub-markets along the Highway 400 Corridor.
- Major office employment in the City of Barrie is forecast to accommodate approximately 2,200 employees over the 2016 to 2041 period. This represents 4% of the City's total employment growth over the 25-year forecast period.

¹ Based on a survey of major office buildings prepared by Watson & Associates Economists Ltd. utilizing real estate leaseings and G.I.S. building footprint data and aerial imagery. Total G.F.A. major office space in the City of Barrie is approximately 61,300 sq.m (660,000 sq.ft.) and includes vacant and occupied building space.



5.6.2.3 Industrial Employment

The majority of industrial employment (approximately 75%)¹ within the City of Barrie is located on employment lands. Industrial employment located in Community Areas primarily consists of operations not requiring a location on employment lands (e.g. craft breweries,² commercial printing operations, and transportation services (taxi)). In terms of an employment breakdown by employment sector, employment lands in the City of Barrie are comprised of 64% employment from the industrial sector, while the remaining 36% is comprised of employment in major office, commercial/population-related and institutional sectors.

Existing Industrial Base in the City of Barrie

Key components of the City's industrial base are discussed below.

Manufacturing

- Barrie's largest manufacturing employment sectors include: plastics and rubber products (NAICS 326), fabricated metal products manufacturing (NAICS 332), transportation and equipment manufacturing (NAICS 336) and machinery manufacturing (NAICS 333). These sectors comprise just under half (47%) the City's manufacturing employment base as of 2016.³
- Over the 2011 to 2016 period, the City of Barrie added approximately 600 manufacturing employees,⁴ representing an increase to the City's manufacturing employment base of 14%, an annual growth rate of 2.6%. Since 2016, there has been some new manufacturing businesses setting up operations in the City's Employment Areas, including the SBS Drivetec Inc./Burger Group, Suzuki Canada and Innovative Automation.⁵

¹ Excluding no fixed place of work, 85% of industrial employment is on employment lands.

² Flying Monkeys Craft Brewery in the downtown core of Barrie is an example.

³ Based on Statistics Canada, 2016 Census, Place of Work.

⁴ Based on Statistics Canada, 2011 and 2016 Censuses, Place of Work.

⁵ Based on development activity summarized by the City of Barrie, Invest Barrie, Standards and Poors Reporting, 2018.



Goods Movement (Transportation, Warehousing and Logistics)

- The Goods Movement sector (i.e. transportation/warehousing and wholesale trade) is accommodated in a range of industrial building typologies reflecting the diverse sub-sectors that comprise the sector. This includes distribution centres, warehouses, fulfillment centres, delivery depots, logistics hubs, corporate office buildings of major logistics companies, trucking terminals, multi-tenant warehouses and terminals, cold storage buildings and transportation yards.
- The Goods Movement sector is an integral part of the G.G.H. and local economy, representing approximately 7% of the current employment base in the City of Barrie.¹

Construction

- A large component of the construction sector is associated with employees that have no usual place of work (N.F.P.O.W.). Construction sub-sectors involved in large-scale construction projects typically require land to store equipment and machinery in proximity to major roads and highways. More specialized construction firms may require offices and facilities. Employment in this sector may include a wide-range of job types, including labourers, trades persons and engineers.
- The City has a relatively high concentration of employees in the construction sector. Over the forecast period, a portion of industrial employment growth is anticipated to be generated from construction employment, driven by both residential and non-residential development activity within the City and the surrounding area. This includes employment associated with construction of buildings, heavy and civil engineering construction and speciality trade contractors.

Major Disruptors and Opportunities for Industrial Employment

Goods Movement (Transportation, Warehousing and Logistics)

- Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing

¹ Based on data 2016 Census – NAICS codes: 41-Wholesale trade and 48-49 Transportation and Warehousing.



facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. Demand in the Goods Movement sector is anticipated to continue across the G.G.H., particularly in locations where available employment lands have strong connectivity to regional transportation infrastructure (i.e. intermodal facilities and 400-series highway access). Rising industrial land prices and diminishing employment land supply, however, continue to shift development pressure for mid- to large-scale, land-extensive industrial uses from large, mature G.T.H.A. municipalities, to other competitively priced Ontario markets, such as Barrie, that offer ample market choice and support regional infrastructure to accommodate near-term demand and future expansion requirements.

- Several factors have been changing the nature of the Goods Movement industry over recent years, including just-in-time manufacturing, E-commerce and globalization. It is expected that the industry will continue to evolve and, in the near-term, the following trends are expected in Canada:
 - Just-in-time manufacturing will continue to be the industry norm, placing increasing emphasis on more frequent and smaller deliveries by truck transport;
 - Automation of distribution centres allows for more vertical storage; however, the need for numerous loading bays will dictate land requirements, and the industry trend is for more and more bays at facilities;
 - Larger facilities are a continuing trend versus smaller properties; typically, the larger the property, the lower the average employment density;
 - Locations close to multi-modal facilities continue to be very attractive with access to rail – this is generating increased demand for larger-scale logistics hubs. Intermodal hubs typically require approximately 200 to 300 ha (500 to 740 acres) for intermodal infrastructure and loading/unloading areas. Express terminals are smaller (<100 ha/250 acres);
 - The increasing growth in E-commerce is anticipated to have a significant impact on employment growth and land demand related to the logistics sector. E-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade and it is estimated that current online sales account for 6% of total Canadian retail spending. By



comparison, U.S. online sales account for 9% of total spending.¹ Delivery expectations within this sector are increasing on an annual basis. As delivery times decrease, it is anticipated that demand for regional fulfilment centres will increase; and

- Reverse logistics – approximately 25% to 30% of online merchandise is returned, which is generating increasing need for dedicated return centres.
- Only 14% of the currently serviced employment lands are within 1 km of a Highway 400 interchange. The majority of the City's available vacant employment lands are located within the Salem and Hewitt's Secondary Plan Areas, which are currently unserviced or are sites that are beyond a 1 km distance from a Highway 400 interchange. Servicing and a new interchange (Secondary Plan notes the location of a potential interchange) added to the Salem and Hewitt's Secondary Plan Areas may offer sites with other opportunities to support this sector.

Construction

- As previously discussed, the construction sector has been a key component of industrial employment growth for the City of Barrie.
- The City offers a wide range of location options to support the construction sector.

5.6.3 Employment Forecast by Land-Use Category

As summarized in Figure 5-26, the City's Employment Areas are forecast to accommodate approximately 22,100 employees or 41% of the growth over the forecast horizon. Community Areas are forecast to accommodate the remaining 59% of the employment growth.

¹ Purolator Logistics. Adapting your Canadian Supply Chain for E-commerce Efficiency. 2015.



Figure 5-26
City of Barrie
Employment Forecast by Land-Use Category, 2016 to 2041

Planning Period ¹	Rural Area	Community Area	Employment Area	Total Employment Area ²
Total Employment				
2016	60	51,680	22,040	73,780
2018	60	52,390	22,660	75,110
2041	60	84,160	44,780	129,000
2018 - 2041	0	31,770	22,120	53,890
Share of City-Wide Employment (%)				
2016	0.1%	70%	30%	100%
2018	0.1%	70%	30%	100%
2041	0.0%	65%	35%	100%
2018 - 2041	0.0%	59%	41%	100%

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded.

1. M.C.R. Base year is Mid-2018.

2. 2011 and 2016 employment is derived from Statistics Canada, Census.

2018 employment is based on an estimate by Watson & Associates Economists Ltd.

2041 employment is derived from the Places to Grow, Growth Plan for the Greater Golden Horseshoe (2019), Schedule 3.



5.7 Employment Land Demand Forecast, 2019 to 2041

5.7.1 Employment Land Forecast, 2019 to 2041

Figure 5-27 provides further details on the employment growth to be accommodated on employment lands by employment type.¹ It is forecast that the majority of the City's industrial employment (91%) will be accommodated on employment lands, while 23% of the City's commercial/population-related employment growth will be accommodated on employment lands, primarily as employment-supportive uses. Employment Areas are also forecast to accommodate just under one-third of the major office growth, while the majority of the growth within this employment category is primarily forecast to occur in the City's U.G.C., nodes and corridors.²

Figure 5-28 provides a summary of the composition of the forecast of employment on employment lands. As summarized in Figure 5-28, employment in the industrial sector is forecast to comprise 59% of the employment within the Employment Areas, followed by commercial/population-related at 38% and major office at 3%. As previously discussed, it is important to note that commercial/population-related employment within Employment Areas is primarily comprised of employment from commercial sectors accommodated in small professional offices³ and commercial services (e.g. research labs, collision repair and media production studios) that typically require larger lots than those found in the downtown core and retail plaza sites. To a lesser extent, the forecast assumes some retail commercial employment in Employment Areas (e.g. gas stations, equipment rentals, fitness centres and restaurants) to support the operations of businesses and employees.

¹ A small portion of industrial employment is forecast in Community Areas (e.g. taxi service, contractors) and primarily due to N.F.P.O.W. employment.

² Major office includes employment contained within freestanding buildings greater than 1,860 sq.m (20,000 sq.ft.) and is consistent with the L.N.A. Methodology, p.72. This differs from the 4,000 sq.m (43,000 sq.ft.) size threshold that is used in the Growth Plan, 2019 for determining the size of buildings that must be located near existing or planned frequent transit. Employment Areas currently accommodate a small portion of the City's major office employment, accounting for an estimated 15% of the employment as of 2018.

³ Such as engineering offices, telecommunications operations and veterinarian offices.



Figure 5-27
City of Barrie
Employment Growth on Employment Lands
2018 to 2041

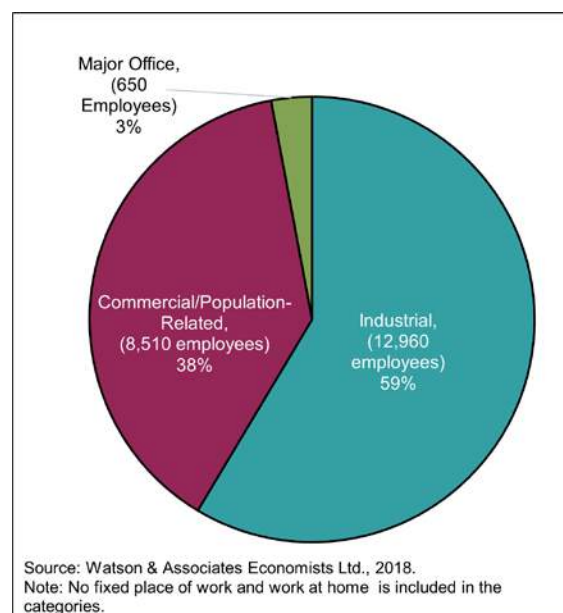
Employment Type	Percent of City Employment Growth on Employment Lands (2018-2041)	Employment Growth on Employment Lands (2018-2041)
Primary	0%	0
Industrial	91%	12,960
Commercial/Population-Related	23%	8,508
Major Office ¹	31%	653
Total	41%	22,120

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

Note: Work at Home and No Fixed Place of Work is included in the Rural-Based, Industrial, Commercial/Population-Related and Major Office categories.

¹ Includes office employment contained within free-standing buildings more than 20,000 sq.ft. (1,858 sq.m.). This differs from the 4,000 sq.m. size threshold that is used in the Growth Plan for determining the size of buildings that must be located near existing or planned frequent transit.

Figure 5-28
City of Barrie
Distribution of Employment Growth on Employment Lands
2018 to 2041





5.7.2 Employment Land Density, 2019 to 2041

There are several macro-economic trends that are influencing average density levels on employment lands. Generally, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive warehousing and logistics facilities to support distribution and transportation of goods throughout the expanding urban population base.

The evolving form of industrial and non-industrial development on employment lands is also influencing average density levels on employment lands. Increasingly, major employers accommodated on employment lands are integrating industrial, office and training facilities on-site. These sites also provide significant land area to accommodate surface parking and, in some areas, future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than standalone major office developments.

On the other hand, growing demand within the multi-tenant and standalone office sector in the City of Barrie is anticipated to have an upward influence on average employment densities on employment lands over the long term. Office employment on employment lands also generates demand for on-site and off-site employment amenities that also tend to have an upward influence on average employment density on employment lands.

As summarized in Figure 5-29a, over the forecast period, it is anticipated that employment density levels will modestly increase to 26 jobs/gross ha (11 jobs/gross acre) from 22 jobs/gross ha (9 jobs/gross acre). An increase in employment density is largely due to a wider range of uses anticipated in the City's remaining vacant Employment Areas, including some major office, in particular a greater utilization of land within the Newly Developing Employment Areas, as summarized in Figure 5-29b.



Figure 5-29a
Employment Density (jobs/gross ha)
on Employment Lands

Employment Density (jobs/gross ha)		
2018	New Growth on Employment Lands 2018-2041	2041
22	31	26

Source: Watson & Associates Economists Ltd.

Figure 5-29b
Employment Density (jobs/gross ha)
Built Employment Area and Newly Developing Employment Area

Employment Area Jobs	Employment Density (jobs/gross ha)		
	2018	2018-2041	2041
Existing Employment Areas Located:			
Outside Settlement Areas	n/a	n/a	n/a
in Built Employment Area	22	n/a	27
in Newly Developing Employment Area ¹	0	31	31
Total Existing Employment Area	22		27.3

Source: Watson & Associates Economists Ltd.

¹Newly developing Employment Area includes the designated employment lands in the Salem Secondary Plan Area.



5.7.3 Employment Land Demand, 2019 to 2041

Figure 5-30 provides a summary of the employment demand that is forecast to be accommodated on designated employment lands. As summarized in Figure 5-30, it is forecast that approximately 18,000 employees will be accommodated on existing designated employment lands (approximately 526 gross ha/1,300 gross acres),¹ as well as through intensification of already occupied or partially developed parcels. Key assumptions regarding the growth forecast for the City's Employment Areas are summarized below:

- Approximately 8% of the forecast employment growth on employment lands will be accommodated through intensification (approximately 1,800 jobs) on already occupied or partially developed parcels;
- Adjusted for intensification, approximately 16,200 jobs are forecast to be accommodated on vacant employment lands (approximately 526 gross ha/1,300 gross acres); and
- An average forecast employment density of 31 jobs/gross ha (13 jobs/gross acre) has been assumed for all new development accommodated on designated Employment Areas between 2018 and 2041. As previously summarized in Figure 5-29a, this is higher than the current the existing average density in the City's Employment Areas of approximately 22 jobs/gross ha (9 jobs/gross acre). The growth forecast on employment lands with a density of 31 jobs/gross ha (13 jobs/gross acre) will increase the City's overall

Employment Growth Forecast Accommodated in Employment Areas by 2041

Adjusted for intensification, approximately 16,200 jobs are forecast to be accommodated on vacant employment lands (approximately 526 gross ha/1,300 gross acres).

Average Forecast Employment Density

An average forecast employment density of 31 jobs/gross ha (13 jobs/gross acre) has been assumed for all new development accommodated on designated Employment Areas between 2018 and 2041.

¹Represents approximately 82% of the total City-wide forecast for Employment Areas, as previously discussed. 18,400 (employees accommodated on existing designated employment lands) divided by 22,120 (City-wide Employment Area forecast) = 83%.



average density on employment lands in 2041 to 26 jobs/gross ha (10.5 jobs/gross acre).

Figure 5-30
City of Barrie
Employment Demand on Employment Lands

Sector	2018 Employment Area Employment Base	Employment Area Growth, 2018-2041 ¹	Employment Accommodated on Designated Employment Lands					
			Employment Accommodated on Existing Designated Employment Lands	Employment Accommodated on Existing Lands through Intensification ²	Employment on Employment Lands Adjusted for Intensification	Density (jobs/gross ha)	Land Area, Gross ha	Total Designated Employment Area Capacity (jobs)
	A	B	C	D	E = C - D	F	G = E/F	H = A + C
Industrial	14,660	12,960	9,869	1,007	8,862	23	385	24,530
Commercial/Population-Related	7,750	8,508	7,818	797	7,021	51	137	15,570
Major Office	250	653	353	0	353	80	4	600
Total Employment	22,660	22,120	18,040	1,804	16,236	31	526	40,700

Source: Watson & Associates Economists Ltd.

¹No fixed place of work represents an additional 20% of employment associated with employment lands.

²Assumes 8% of employment to be accommodated through intensification on employment lands (based on an overall average. Industrial intensification average is higher, while no adjustment has been made to Major Office)

5.7.4 Employment Land Needs, 2041

As summarized in Figure 5-31, it is forecast that approximately 116 additional gross hectares (287 gross acres) area required to accommodate an additional 4,100 jobs that cannot be accommodated on existing designated employment lands. As summarized in Figure 5-31, there is a shortfall of employment land to accommodate forecast employment land needs to 2041. It is noted that a moderately higher average employment density of 35 jobs/gross ha (14 jobs/gross acre) has been assumed for additional Employment Area lands.



Figure 5-31
City of Barrie
Employment Land Need by 2041

Establishment of Employment Area Need		Notes:
Total Employment Forecast - Employment in Employment Areas at 2041	44,780	Figure 5-26
Total Jobs in <u>Existing Designated</u> Employment Area at 2041	40,700	Figure 5-30
Remaining Unallocated Employment Area Jobs at 2041	4,080	
Target Density of Additional New Lands (employment density - jobs per ha)	35	
Additional Employment Area Land Need (ha)	116	

Source: Watson & Associates Economists Ltd.

Additional Employment Area Land Need

Figure 5-32 provides details on the forecast employment to be accommodated on the additional employment lands to be designated by 2041. A higher employment density of 35 jobs/gross ha (14 jobs/gross acre) is assumed for the additional employment lands to be designated. As summarized previously in Figures 5-21a and 5-21b, the density of the City's existing designated employment lands is 26 jobs/gross ha (10.5 jobs/gross acre) by 2041. The additional employment lands are forecast to raise the employment density average to 27 jobs/gross (11 jobs/gross acre) ha by 2041 as summarized in Figure 5-33.



Figure 5-32
City of Barrie
Additional Employment Lands Required

Sector	Employment ¹		Total Employment Not Accommodated on Existing Employment Lands (Proposed Employment Lands Expansion Area)		
	Employment	Employment Accommodated on Existing Designated Employment Lands ²	Employment	Density (jobs/gross ha)	Land Need, Gross ha
Industrial	12,960	9,869	3,091	30	103
Commercial/Population-Related	8,508	7,818	689	75	9
Major Office	653	353	300	85	4
Total Employment	22,120	18,040	4,080	35	116

Source: Watson & Associates Economists Ltd.

¹No fixed place of work represents an additional 20% of employment associated with employment lands.

²Assumes 8% of employment to be accommodated through intensification on employment lands.



Figure 5-33
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	40,700
B) Total Employment on Additional Lands	<u>4,080</u>
C) Total Employment Areas at 2041 $C = A + B$	44,780
D) Land Area in Existing Employment Areas at 2041	1,539
E) Land Area of Additional Lands	<u>116</u>
F) Total Land Area in Employment Areas at 2041 $F = D + E$	1,655
G) Employment Area Density Target $G = C / F$	27

Source: Watson & Associates Economists Ltd.

5.8 Employment Land Conversions

5.8.1 Provincial Policy Context

In accordance with subsection 2.2.5.9 of the Growth Plan, 2019:

“the conversion of lands within employment areas or prime employment areas to non-employment uses may be permitted only through a municipal comprehensive review ^[1] where it is demonstrated that:

- a) there is a need for the conversion;

¹ In accordance with the Growth Plan, 2019, a Municipal Comprehensive Review (M.C.R.) is defined as, “A new official plan, or an official plan amendment, initiated by an upper- or single-tier municipality under section 26 of the Planning Act that comprehensively applies the policies and schedules of this Plan.”



- b) the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
- c) the municipality will maintain sufficient employment lands to accommodate forecasted employment growth to the horizon of this Plan;
- d) the proposed uses would not adversely affect the overall viability of the employment area or prime employment area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan; and
- e) there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.”

Subsection 2.2.5.11 goes on to state that any change to an O.P. to permit new or expanded opportunities for major retail in an Employment Area may occur only through an M.C.R. undertaken in accordance with policy 2.2.5.9.

The 2014 P.P.S provides further direction with respect to the conversion of Employment Areas to non-employment uses. Subsection 1.3.2.2. of the 2014 P.P.S. states:

“Planning authorities may permit conversion of lands within employment areas to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.”

This report represents a component of the City’s M.C.R. exercise and provides the necessary analysis to address the employment conversion requirements under both the Growth Plan, 2019 and the 2014 P.P.S.

5.8.2 Sites Recommended for Conversions

All the sites identified for conversion were previously evaluated and recommended for conversion as part of the City’s previous 2011 Growth Management Strategy (G.M.S.).¹ Each potential conversion site was reviewed against the following evaluation criteria to determine its merits for conversion:

- Site is located outside an established or proposed industrial/business park;

¹ City of Barrie Growth Management Strategy, Phase 3 prepared by Watson & Associates Economists Ltd. in association with Macaulay Shiomi Howson Ltd. and W. Scott Morgan & Associates Limited, November 3, 2011, p. 7-7.



- Site is isolated from surrounding designated employment lands;
- Site is surrounded by non-employment land uses on at least three sides;
- Conversion would not create incompatible land uses;
- Conversion of site will not negatively affect employment lands in the area;
- Conversion would be consistent/supportive of City policy planning objectives;
- Conversion doesn't contravene any City policy planning objectives;
- Site offers limited market choice for employment lands development due to size, configuration, physical conditions, other; and
- Site does not offer potential future expansion on existing or neighbouring employment lands.

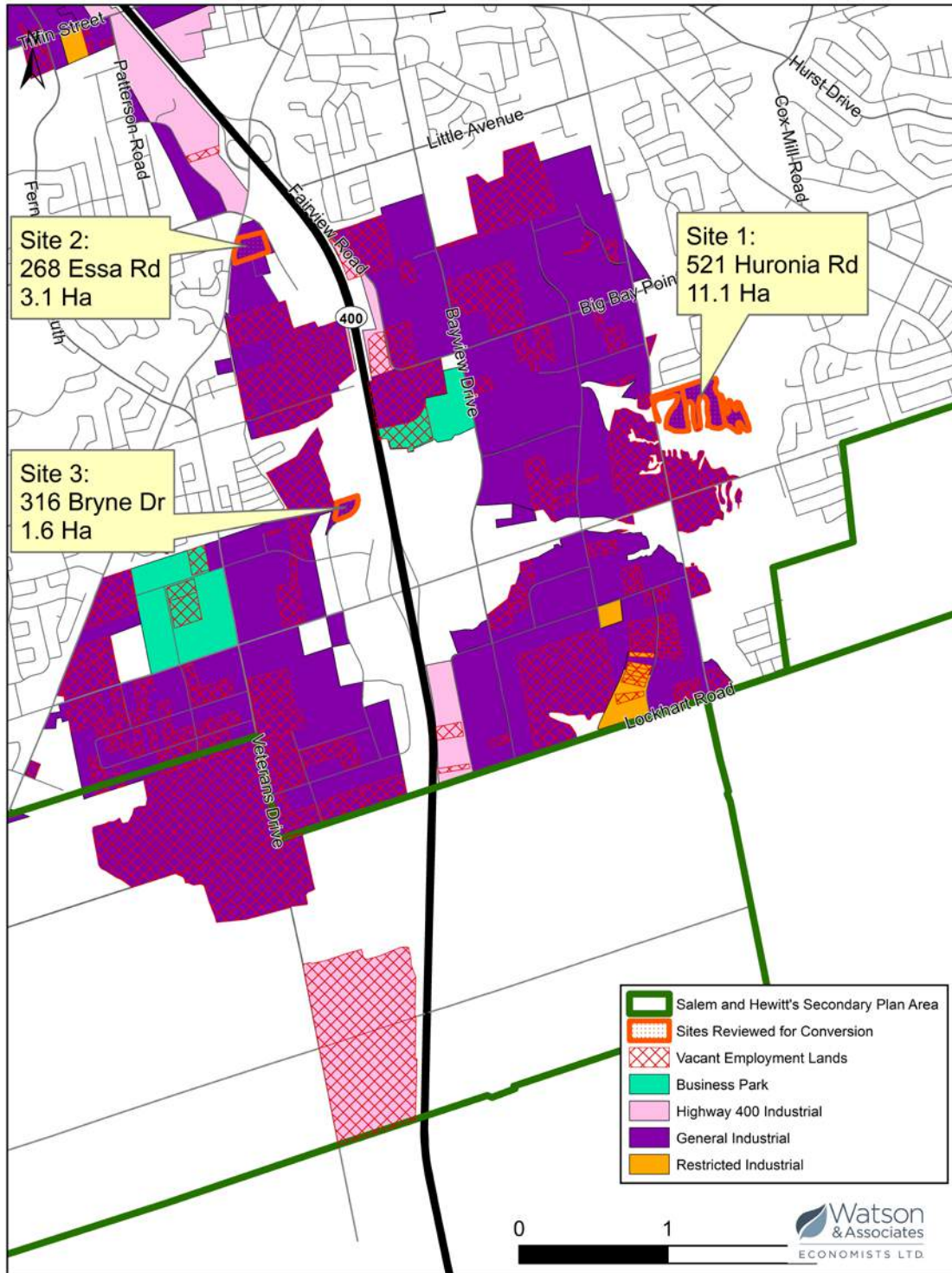
The remaining four sites which were recommended for conversion are summarized below and mapped in Figure 5-34. The vacant employment land supply and land needs analysis previously summarized has already been adjusted to reflect four potential employment conversion sites, totalling 16 hectares (40 acres).

- 521 Huronia Road (south of Loon Avenue) – 11.1 ha (27.6 acres);
- 316 Bryne Drive – 1.6 ha (4.0 acres); and
- 268 Essa Road – 3.1 ha (7.7 acres).

The above sites are recommended for conversion to a non-employment use.



Figure 5-34
City of Barrie
Potential Employment Land Conversion Sites





5.9 Conclusions

With an estimated 2018 employment base of approximately 75,100, the City of Barrie has a diverse and growing economic base and serves as a regional centre to the surrounding municipalities within Simcoe County. Over the long term, the City is expected to accommodate balanced growth between residential and non-residential development and provide increasing local job opportunities for the residents of Barrie. By 2041, the City's employment base is forecast to reach approximately 129,000, in accordance with Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 53,900 jobs from 2018, or an annual employment growth rate of 2.4%. Over the 2018 to 2041 period, employment within Employment Areas is anticipated to account for 59% of total employment, while Community Areas are anticipated to account for the remaining 41% of total employment. Looking forward, the composition of both the City's Community Areas and Employment Areas is anticipated to evolve and change. A number of major disruptive factors are impacting and altering the nature of economic activities and the built form of employment lands and community lands. These factors are summarized below.

Community Lands

Over the past decade, advancements in E-commerce, coupled with a shift in customer purchasing behaviours have changed the perception of what is required from a physical retail store. Retailers have responded to these changes by providing innovative retail concepts and flexibility in their retail platform (blending the physical store with E-commerce). From a real estate and land development perspective, the demand for commercial space has resulted in an increasing range of built-form and location options, diverging from the previous decade of developing primarily large-scale stores, big-box stores and power centres. Within the local context, the City of Barrie is starting to see mixed-used developments and a renewed interest in the downtown core, although retail development in Barrie has still been very active in the City's large commercial nodes. Population growth and increased density will continue to be a major focus in directing the City's commercial development within the City's U.G.C., M.T.S.A.s and other strategic growth areas. Further, population growth within these areas will also provide the opportunity to support the existing commercial base.



Employment Lands

Structural changes in the broader economy are altering the nature of economic activities and built form on employment lands and impacting their character. Over the past decade, the composition of industrial development in Ontario has evolved, with less emphasis on the manufacturing sector and more demand oriented to large-scale industrial buildings housing wholesale trade, distribution and logistics. Market demand on employment lands has also been increasingly driven by growth in the knowledge-based economy, including employment sectors such as professional, scientific and technical services; finance and insurance; real estate; and information and culture; health care; and education. With an increasing emphasis on these knowledge-based sectors, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming an increasingly dominant built form. There is also increasing demand to accommodate employment-supportive commercial and institutional uses on employment lands that offer amenities and services convenient to local businesses and their employees.

A major factor in the future competitiveness of the City's economic base is the quantity and quality of its vacant employment lands. As of January 2018, the City of Barrie had a total of 526 gross ha (1,300 gross acres) of vacant designated employment land, including a net developable vacant employment land supply of 444 net ha (1,100 net acres). Based on a desktop review of lands with direct access to roads and servicing of water and wastewater, it is estimated that approximately 276 gross ha (682 net acres) are considered serviced, representing approximately 53% of the vacant land supply.

Given the large number of established industrial areas and business parks in Barrie, a wide array of opportunities exist to intensify the City's Employment Areas. Based on recent trends regarding employment land intensification and the likely intensification and redevelopment of existing Employment Areas, it is anticipated that 8% of employment growth on employment lands over the 2018 to 2041 period will be accommodated through intensification in the City of Barrie. Adjusted for intensification, the City is anticipated to require 642 gross ha (1,590 gross acres) of vacant, developable D.G.A. to accommodate future employment growth on employment lands to the year

City of Barrie Long-Term Employment Land Needs

There is a shortfall of 116 gross ha (287 gross acres) to accommodate employment land growth by 2041.



2041.¹ Based on this long-term assessment, the City does not have a sufficient supply of vacant designated lands to accommodate forecast demand through to 2041, as summarized in Figure 5-35, a shortfall of 116 gross ha (395 gross acres).

Figure 5-35
City of Barrie
Employment Land Need by 2041

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	40,700
Remaining Unallocated Employment Area Jobs at 2041	4,080
Target Density of Additional New Lands (employment density - jobs per ha)	35
Additional Employment Area Land Need Need (ha)	116

Source: Watson & Associates Economists Ltd.

¹ The existing vacant designated employment land supply is 526 gross ha (1,300 gross acres).



Chapter 6

Greenfield Community Land Needs Assessment



6. Community Land Needs Assessment

6.1 Introduction

This chapter builds on the findings of the City's Housing Analysis (Chapter 3) and Intensification Strategy (Chapter 4) by providing a long-term residential land needs assessment for D.G.A. community lands within the City of Barrie. This chapter also builds upon the Community Area employment forecast provided in the Employment Analysis (Chapter 5) as it relates to the need for D.G.A. employment (primarily population-related employment) within the City's community lands. Key components of this chapter include:

- A summary of potential housing unit supply to be accommodated on vacant designated residential land within the D.G.A.;
- An overview of greenfield density trends and forecast people and jobs density;
- Population, household and employment on community lands forecast to 2041 for the D.G.A.; and
- Long-term community land needs to 2041.

The greenfield community land needs assessment has been prepared in accordance with the guidelines in the Growth Plan, 2019 and the L.N.A. Methodology for the G.G.H.

6.2 Provincial Policy Context

As previously discussed in Chapter 2, the Growth Plan, 2019 identifies a minimum density for the greenfield areas of 50 residents and jobs combined per gross ha, as identified in the Growth Plan, 2019. Municipalities can apply for an alternative target.

6.3 Greenfield Density Trends

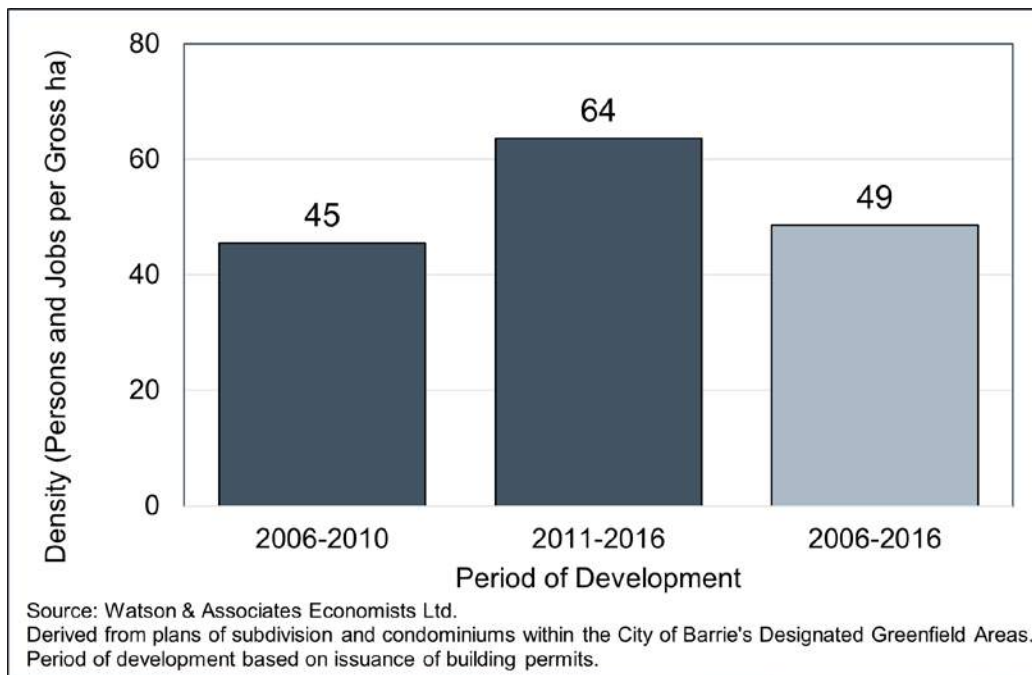
Density is a key component in assessing the D.G.A. land needs. As summarized in Figure 6-1, residential greenfield density within the City of Barrie over the 2006 to 2010 period averaged approximately 45 people and jobs per gross ha. During the following five-year period, this average increased to 64 people and jobs per gross ha. Based on a review of the City's active development applications within community areas, it is anticipated that the City can continue to achieve an average residential density of



approximately 62 people and jobs per gross ha over the forecast planning horizon. The densities planned for Community Areas within the Salem and Hewitt's Secondary Plan Areas, as well as the potential high-density development opportunities identified around the Barrie South M.T.S.A., further support this assumption. A review of D.G.A. density based on approved and planned development is discussed later in this chapter.

It is important to note, the people and jobs density of 62 people and jobs per gross ha is well above the Growth Plan, 2019 target of 50 people and jobs per gross ha.

Figure 6-1
City of Barrie
Residential Development Density Trends
within Designated Greenfield Areas
2006 to 2016



6.4 Greenfield Residential Land Supply

As summarized in Figure 6-2, the City's vacant D.G.A. has an estimated land capacity to accommodate approximately 28,100 housing units, comprised of 52% high-density units, 34% low-density units and 13% medium-density units. High-density housing potential is largely concentrated around the Barrie South M.T.S.A., with approximately 4,700 high-density housing units identified within this area.



Figure 6-2
City of Barrie
Designated Greenfield Area
Designated Vacant Land Supply and Potential Housing Supply as of January 2019

Location	Status	Housing Units			Total Units
		Low Density	Medium Density	High Density	
Designated Greenfield Area (excludes Salem and Hewitt's Secondary Plan Area)	Units in Development Approvals	960	0	3,348	4,308
	Other Designated Lands	371	142	176	689
	Additional Intensification Capacity (Barrie South M.T.S.A.) ⁴	0	0	4,645	4,645
	Secondary Suites ³	0	0	175	175
	Total Supply	1,331	142	8,344	9,817
	<i>Unit Mix (%)</i>	<i>14%</i>	<i>1%</i>	<i>85%</i>	<i>100%</i>
Salem and Hewitt's Secondary Plan Areas	Units in Development Approvals	5,659	2,586	2,108	10,353
	Other Designated Lands	2,607	1,042	4,258	7,907
	Total Supply	8,266	3,628	6,366	18,260
	<i>Unit Mix (%)</i>	<i>45%</i>	<i>20%</i>	<i>35%</i>	<i>100%</i>
Total Designated Greenfield Area	Units in Development Approvals	6,619	2,586	5,456	14,661
	Other Designated Lands	2,978	1,184	4,434	8,596
	Additional Intensification Capacity (Barrie South M.T.S.A.) ⁴	0	0	4,645	4,645
	Secondary Suites ³	0	0	175	175
	Total Supply	9,597	3,770	14,710	28,077
	<i>Unit Mix (%)</i>	<i>34%</i>	<i>13%</i>	<i>52%</i>	<i>100%</i>

Source: Summarized by Watson & Associates Economists Ltd. based on data prepared by the City of Barrie, January 2019.

¹Low-density units include singles & semi-detached; medium-density units include townhouses; and high-density units include apartments.

²Based on high range of unit yield prepared by the City of Barrie, January 2019.

³Based on 40 secondary suites annually over the 2019 to 2041 period, assumes 80% within the built boundary and the remaining 20% in the D.G.A.

⁴Additional intensification capacity based on an estimate by Watson & Associates Economists Ltd. of intensification opportunities surrounding the Barrie South M.T.S.A. of approximately 4,650 units (north of Maplevue Drive).



6.5 Forecast Growth on Greenfield Lands Within the City of Barrie, 2016 to 2041

6.5.1 Population and Households Forecast in the D.G.A.

By 2041, the City's D.G.A. is forecast to reach a population of 76,000 and 29,800 housing units. As summarized in Figure 6-3, forecast population growth within the City's D.G.A. will be accommodated in 26,800 households over the 2016 to 2041 period. The forecast allocation for the D.G.A. is based on the D.G.A. accommodating 56% of the City's housing growth over the 2016 to 2041 horizon, approximately 1,100 units annually. It is assumed that most of the demand within the D.G.A. over the forecast horizon will be accommodated in the City's Secondary Plan Areas. As previously mentioned, the area surrounding the Barrie South M.T.S.A (north of Mapleview Drive) is forecast to accommodate a significant portion of the demand for new households within the City's D.G.A. over the forecast horizon.

Figure 6-3
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
2016	9,500	3,020
2021	28,300	9,320
2031	55,600	20,150
2041	76,000	29,800
Increment		
2016-2021	18,800	6,300
2021-2031	27,300	10,830
2031-2041	20,400	9,650
2016-2041	66,500	26,780

Source: Watson & Associates Economists Ltd.

¹Based on undercount of approximately 3%.

Figures may not add up precisely due to rounding.



6.5.2 Population and Community Area Employment Forecast in the D.G.A.

As summarized in Figure 6-4, approximately 76,000 people (as previously summarized in Figure 6-3) and 24,600 jobs are forecast on D.G.A. lands across the City. The employment forecast for the Community Area summarized in Figure 6-4 builds upon the Community Area forecast provided in Chapter 5. Over the 2016 to 2041 period, the D.G.A. is forecast to accommodate approximately 57% of the City's Community Area employment growth. The majority of the employment growth within the D.G.A. is expected to serve the population within the new neighbourhoods in the Salem and Hewitt's Secondary Plan Areas, providing a range of institutional services (e.g. schools, community centres, etc.) as well as retail and commercial services. In total, the D.G.A. is forecast to accommodate approximately 100,600 people and jobs by 2041, as summarized in Figure 6-4.

Figure 6-4
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	76,000
Community Area Employment ²	24,600
Total Population and Employment	100,600

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.



6.6 Forecast Greenfield Land Needs, 2016 to 2041

6.6.1 Population and Household Forecast Accommodated on Existing Designated Greenfield Lands

As summarized in Figure 6-5, the City of Barrie currently has approximately 1,460 gross ha (3,608 gross acres) of D.G.A. lands in Community Areas.¹ By 2041, the D.G.A is forecast to accommodate approximately 90,700 people and jobs at a density of 62 people and jobs per gross ha.²

Figure 6-5
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	67,300
Employment ³	23,400
Total Population and Employment	90,700
Existing Gross Land Area (ha) ⁴	1,459
People and Jobs Density per 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 Approximately 197 ha (487 acres) has been developed since 2018. Approved and pending applications comprise 584 ha (1,443 acres) of the land area, while 242 ha (598 acres) are currently vacant with no applications at this time.

² Refer to Figure 6-1 for density trends.



6.6.2 Designated Greenfield Area Land Need

As summarized in Figure 6-6, the City of Barrie D.G.A. is not anticipated to have the land capacity to accommodate the greenfield area population and employment forecast to 2041. By 2041, an additional 9,900 people and jobs would need to be accommodated on future D.G.A. lands within the City of Barrie (100,600 less 90,700). At an average density of 60 people and jobs per gross ha, this would require an additional 165 gross ha (408 gross acres).

Figure 6-6
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	76,000
Employment	24,600
A) Total D.G.A. and Post-2031 Lands	100,600
Total Population and Employment to be Accommodated within Existing D.G.A.	
Population	67,300
Employment	23,400
B) Total D.G.A.	90,700

Land Need	2041
Greenfield Area Forecast Not Accommodated on Existing D.G.A. Lands (A - B)	9,900
Minimum Density Target for New D.G.A. (post-2031 lands) (per gross ha)	60
Community Area Land Need (ha)	165

Source: Watson & Associates Economists Ltd.

6.7 Conclusions

Figure 6-7 summarizes the preferred D.G.A. density target for the City of Barrie under the preferred “Made in Barrie” Growth Scenario. The preferred D.G.A. density target



gives consideration to both historical and forecast density trends within the City's greenfield areas. Through this review, it has been determined that D.G.A developments within Community Areas in the City of Barrie have averaged 49 people and jobs per gross ha (2006 to 2016). Looking forward, it is anticipated that average D.G.A. density levels in the City's Community Areas will exceed the Growth Plan, 2019 D.G.A. density target.

Figure 6-7
City of Barrie
Preferred "Made in Barrie" Greenfield Density Target

Greenfield Density (People/jobs per gross ha) ¹			Opportunity/Challenge
Geographic Area	Preferred "Made in Barrie" Scenario	Growth Plan, 2019	
Designated Greenfield Area (D.G.A.)	62	50	City of Barrie is aiming to exceed the Growth Plan, 2019 target and also maximize the average greenfield area density target by allocating high-density growth around the Barrie South GO train station.
Future Designated Greenfield Area (F.D.G.A.) ²	60	50	Given the location attributes of the F.G.D.A. lands in the Salem and Hewitt's Secondary Plans, a slightly lower density is assumed; however it is still well above the Growth Plan, 2019 target.
Total Designated Greenfield Area	62	50	

Source: Watson & Associates Economists Ltd.

¹Reflects community lands only. Excludes employment lands.

²Reflects post-2031 lands in Salem and Hewitt's Secondary Plans.

In accordance with the preferred greenfield density target, the City of Barrie's D.G.A. I is not anticipated to have the land capacity to accommodate the greenfield area population and employment forecast to 2041 based on a review of its current land supply,¹ and recommended intensification targets². By 2041, an additional 9,900

¹ The City has a total designated community land supply (vacant and occupied) of 1,459 gross ha (3,605 gross acres).

² Based on 47% of housing growth within the B.U.A. over the 2022 to 2041 period.



people and jobs are anticipated to be needed on future D.G.A. lands within the City of Barrie (100,600 less 90,700). At an average density of 60 people and jobs per gross ha, this would require an additional 165 gross ha (408 gross acres) of land to be designated.

Figure 6-8
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	76,000
Employment	24,600
A) Total D.G.A. and Post-2031 Lands	100,600
Total Population and Employment to be Accommodated within Existing D.G.A.	
Population	67,300
Employment	23,400
B) Total D.G.A.	90,700

Land Need	2041
Greenfield Area Forecast Not Accommodated on Existing D.G.A. Lands (A - B)	9,900
Minimum Density Target for New D.G.A. (post-2031 lands) (per gross ha)	60
Community Area Land Need (ha)	165

Source: Watson & Associates Economists Ltd.



Chapter 7

Conclusions



7. Conclusions

The following Chapter summarizes the key findings of the City's long-term urban land needs assessment to the year 2041, which has been prepared under the requirements of the 2019 Growth Plan and corresponding M.C.R. process.

7.1 Housing Analysis

In recent decades, the City of Barrie has represented one of the faster growing municipalities in Canada. Over the next 25 years this strong rate of residential growth is anticipated to continue. Between 2016 and 2041, Barrie's population base is forecast to increase by approximately 107,200 persons. To accommodate future population growth, the City is forecast to require approximately 47,500 new households between 2016 and 2041. As previously mentioned, the preferred population and housing forecast was developed based on the results of the 2018 City of Barrie Long-Term Growth Scenarios Review Study (Scenario 3 – Made in Barrie).

To accommodate this population forecast, a high rate of future housing development is anticipated within both the City's B.U.A. and its D.G.A. over the longer term planning horizon. Collectively, the level of average annual housing growth projected across the City over the next 25 years is anticipated to be comparable to levels the City experienced during the 2001 to 2006 period; approximately 1,900 new households per year. The City's housing strategy, presented herein, represents a transformative long-term vision which recognizes that, as the City continues to mature and urbanize, future needs will continue to evolve and diversify by built-form and density along with the City's diversifying.

It is important to recognize that the forecast mix of high-density housing growth summarized in this report does not represent a status quo scenario. Achieving the targeted percentage of forecast high-density housing for the City of Barrie 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. For example, it is recommended that the City review its existing O.P. policies regarding minimum housing densities within its nodes and corridors outside the Urban Growth (U.G.C.) and Major Transit Station Areas (M.T.S.A.s). The City will also need to consider policies that appropriately accommodate development between the B.U.A., the D.G.A. and future



designated greenfield areas (F.D.G.A.) to ensure that greenfield development is phased in a manner that does not undermine the City's long-term housing intensification objectives.

7.2 Intensification Strategy

The City has significant opportunities to accommodate new housing within the B.U.A. (up to 43,000 housing units based on a high range scenario of intensification potential). While intensification opportunities represent a large portion of the total vacant housing supply within the City of Barrie, it is important to note that the majority (74%) of the intensification potential identified is comprised of high-density housing units (i.e. apartments). As summarized in Chapter 4, it is forecast that the City will achieve a built boundary intensification rate of 47% over the 2022 to 2041 forecast period. It is noted that this recommended residential intensification target falls below the residential intensification targets set out in the Growth Plan, 2019 and proposed Amendment #1 to the Growth Plan, 2019.

As the City's designated urban lands continue to mature and develop, a growing share of new residential and non-residential development is expected to occur within the City's intensification nodes, corridors and other redevelopment areas within the B.U.A., as directed by the City's O.P. policy. This shift in development patterns is anticipated to result in a steady increase in the share of high-density housing forms (i.e. low-, medium- and high-rise apartments) over the medium (2022 to 2031) and longer term (i.e. post-2031).

Accommodating a greater share of high-density development in the City of Barrie is fundamental to the objectives of this M.C.R. As the City of Barrie continues to mature, there will be a growing need to increase the utilization of available, designated urban lands to accommodate new development in more compact forms, particularly through high-density development. Population growth and increased urbanization of the City's B.U.A. are anticipated to bring new urban amenities and municipal services to the City (i.e. increased transit services, indoor recreation facilities, shopping, arts and cultural facilities, etc.) as well as local employment opportunities, which will benefit both the City and its local residents. Accordingly, provincial and local policies direct the City to accommodate an increasing share of its population base in high-density households. While this represents good planning policy, it is important to recognize that a large



share of historical residential development within the City of Barrie has been ground-oriented (refer to Figure 7-1 herein). To achieve the intensification targets set out herein, a greater proportion of the City's existing and future population will need to be accommodated in high-density households, including a greater proportion of adults between 30 and 54 years of age and their children. From a real-estate market perspective, the objective of accommodating a greater share of families in high-density households can be challenging, given the relatively higher price and carrying costs associated with larger apartments (i.e. apartments with greater than two bedrooms) compared to more compact ground-oriented housing forms with relatively comparable livable space (i.e. townhouses, stacked townhouses/back-to-back townhouses and other low-rise hybrid buildings). Furthermore, the feasibility of high-density housing forms across the City's existing neighbourhoods may need to be further examined against current zoning permissions for residential development. To facilitate this shift towards more compact high-density urban development, the City may also need to consider the use of planning and/or financial tools, as well as other policies, that address the implementation of the City's long-term vision.

With respect to residential intensification, there are two unique local factors that impede the City's ability to meet the requirements of the Growth Plan, 2019 with respect to residential intensification. These include:

- **Development of the Salem and Hewitt's Secondary Plan Areas** – impacts the percentage share of housing allocated to the B.U.A. within the City largely between 2016 and 2031, and to a lesser extent during the post-2031 period. The Salem and Hewitt's Secondary Plans are planned to collectively accommodate 40,600 persons by 2031. At buildout, it is estimated that the Salem and Hewitt's Secondary Plan Areas will accommodate approximately 50,700 persons. It is anticipated that as the Salem and Hewitt's Secondary Plan Areas develop, the City's rate of total annual housing growth will increase. As a result, this is likely to impact the percentage of residential development achieved within the B.U.A. relative to total City-wide housing growth, particularly over the next 10 to 15 years.
- **Intensification of Lands Surrounding the Barrie South GO Train Station** – largely impacts the City's residential intensification target largely during the post-2031 period. The Barrie South GO train station is located outside the City's B.U.A. While housing growth within this area will be planned to largely



accommodate high-density housing (i.e. low-rise, mid-rise and high-rise apartments), development immediately surrounding the Barrie South M.T.S.A is treated as greenfield development under the Growth Plan, 2019. This has the impact of further reducing the City's percentage of housing growth allocated to the B.U.A.

Figure 7-1 summarizes the City's greenfield housing forecast over the 2016 to 2041 period by geographic area under the Preferred Growth Scenario. In total, housing growth accommodated through intensification on the lands surrounding the Barrie South GO train station represents approximately 17% of forecast greenfield development within the City between 2016 and 2041. It is important to note that this generally only includes growth to be accommodated within 500 metres of the Barrie South GO train station. The Barrie South M.T.S.A. includes a broader area (City Traffic Zones that are within 800 metres of the Barrie South GO train station), as delineated and summarized in Chapter 4. It is forecast that the Barrie South M.T.S.A. will accommodate approximately 39% of the D.G.A. housing growth forecast over the 2016 to 2041 period.

Figure 7-1
City of Barrie
Greenfield Development Forecast, 2016-2041

Geographic Area	2016-2041 Households	% Share
Salem & Hewitt's Secondary Plans	17,790	66%
Intensification Surrounding Barrie South GO Train Station ¹	4,650	17%
Other Greenfield Area	4,340	16%
Total D.G.A.	26,780	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.

Barrie's U.G.C. and Intensification Nodes and Corridors are expected to accommodate the vast majority of residential intensification over the forecast period. As illustrated in



Figure 7-2, to achieve the 33% and 47% intensification identified herein over for the 2015 to 2021 and 2022 to 2041 periods, respectively, intensification within the U.G.C. and Intensification Nodes and Corridors will need to increase by more than eight-fold relative to historical development levels (i.e. 2011 to 2016).

Figure 7-2
City of Barrie
Annual Housing Intensification Forecast for U.G.C. and Intensification Nodes/Corridors

Residential Intensification Area	Historical Average, 2011-2016	Forecast Growth, 2016-2041	% Change - Historical vs. Forecast
U.G.C.	35	300	857%
Intensification Nodes/Corridors	40	338	845%

Source: Watson & Associates Economists Ltd.

As summarized in Figure 7-3, the City of Barrie is forecast to reach an intensification rate that is close to the intensification target identified in the Growth Plan, 2019.

Figure 7-3
City of Barrie
Preferred Housing Intensification Targets, 2015 to 2041

Period	Intensification Target		
	Preferred "Made in Barrie Scenario"	Growth Plan, 2006	Growth Plan, 2019
2015-2031	40%	40%	
2015-2021	33%		
2022-2031	45%		50% or Alternative
2031-2041	50%		
2022-2041	47%		

Source: Watson & Associates Economists Ltd.



7.3 Employment Lands Analysis

With an estimated 2018 employment base of approximately 75,100, the City of Barrie has a diverse and growing economic base and serves as a regional centre to the surrounding municipalities within Simcoe County. Over the long term, the City's is expected to accommodate balanced growth between residential and non-residential development and provide increasing local job opportunities for the residents of Barrie. By 2041, the City's employment base is forecast to reach approximately 129,000, in accordance with Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 53,900 jobs from 2018, or an annual employment growth rate of 2.4%. Over the 2018 to 2041 period, employment within Employment Areas is anticipated to account for 59% of total employment, while Community Areas are anticipated to account for the remaining 41% of total employment. Looking forward, the composition of both the City's Community Areas and Employment Areas is anticipated to evolve and change. A number of major disruptive factors are impacting and altering the nature of economic activities and the built form of employment lands and community lands. These factors are summarized below.

Community Lands

Over the past decade, advancements in e-commerce, coupled with a shift in customer purchasing behaviours have changed the perception of what is required from a physical retail store. Retailers have responded to these changes by providing innovative retail concepts and flexibility in their retail platform (blending the physical store with E-commerce). From a real estate and land development perspective, the demand for commercial space has resulted in an increasing range of built-form and location options, diverging from the previous decade of developing primarily large-scale stores, big-box stores and power centres. Within the local context, the City of Barrie is starting to see mixed-used developments and a renewed interest in the downtown core, although retail development in Barrie has still been very active in the City's large commercial nodes. Population growth and increased density will continue to be a major focus in directing the City's commercial development within the City's U.G.C., M.T.S.A.s and other strategic growth areas. Further, population growth within these areas will also provide the opportunity to support the existing commercial base.



Employment Lands

Structural changes in the broader economy are altering the nature of economic activities and built form on employment lands and impacting their character. Over the past decade, the composition of industrial development in Ontario has evolved, with less emphasis on the manufacturing sector and more demand oriented to large-scale industrial buildings housing wholesale trade, distribution and logistics. Market demand on employment lands has also been increasingly driven by growth in the knowledge-based economy, including employment sectors such as professional, scientific and technical services; finance and insurance; real estate; and information and culture; health care; and education. With an increasing emphasis on these knowledge-based sectors, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming an increasingly dominant built form. There is also increasing demand to accommodate employment-supportive commercial and institutional uses on employment lands that offer amenities and services convenient to local businesses and their employees.

A major factor in the future competitiveness of the City's economic base is the quantity and quality of its vacant employment lands. As of January 2018, the City of Barrie had a total of 526 gross ha (1,300 gross acres) of vacant designated employment land, including a net developable vacant employment land supply of 444 net ha (1,100 net acres). Based on a desktop review of lands with direct access to roads and servicing of water and wastewater, it is estimated that approximately 276 gross ha (682 net acres) are considered serviced, representing approximately 53% of the vacant land supply.

Given the large number of established industrial areas and business parks in Barrie, a wide array of opportunities exist to intensify the City's Employment Areas. Based on recent trends regarding employment land intensification and the likely intensification and redevelopment of existing Employment Areas, it is anticipated that approximately 8% of employment growth on employment lands over the 2018 to 2041 period will be accommodated through intensification in the City of Barrie. Adjusted for intensification, the City is anticipated to require 642 gross ha (1,590 gross acres) of vacant, developable D.G.A. to accommodate future employment growth on employment lands to the year 2041.¹ Based on this long-term assessment, the City does not have a

¹ The existing vacant designated employment land supply is 526 gross ha (1,300 gross acres).



sufficient supply of vacant designated lands to accommodate forecast demand through to 2041, as summarized in Figure 7-4. More specifically, an additional 116 gross ha (287 gross acres) of employment lands are required to accommodate forecast employment growth over the 2018 to 2041 period.

Figure 7-4
City of Barrie
Employment Land Need by 2041

Employment Land Need	
A) Total Employment Forecast - Employment in Employment Areas at 2041	44,780
B) Total Jobs in <u>Existing Designated</u> Employment Area at 2041	40,700
C) Remaining Unallocated Employment Area Jobs at 2041 (C = A-B)	4,080
D) Target Density of Additional New Lands (employment density - jobs per ha)	35
E) Additional Employment Area Land Need Need (ha) (E = C/D)	116

Source: Watson & Associates Economists Ltd.

7.4 Community Land Needs Assessment

Density is a key component in assessing D.G.A. land needs. Residential greenfield density within the City of Barrie over the 2006 to 2010 period averaged approximately 45 people and jobs per gross ha.¹ During the following five-year period, this average increased to 64 people and jobs per gross ha. Based on a review of the City's active development applications within Community Areas, it is anticipated that the City can continue to achieve an average residential density of approximately 62 people and jobs per gross ha over the forecast planning horizon, as summarized in Figure 7-5 under the Preferred Growth Scenario. The densities planned for Community Areas within the

¹ Gross land area has been calculated in accordance to the Growth Plan, 2019.



Salem and Hewitt's Secondary Plan Areas, as well as the potential high-density development opportunities identified around the Barrie South GO Station, further support this assumption. Looking forward, it is anticipated that average D.G.A. density levels in the City's Community Areas will continue to gradually increase and will exceed the Growth Plan, 2019 density target of 50 people and jobs per gross ha. The forecast greenfield density target herein is well above the density target established under the Growth Plan, 2019, as summarized in Figure 7-5.

Figure 7-5
City of Barrie
Preferred "Made in Barrie" Greenfield Density Target

Greenfield Density (People/jobs per gross ha) ¹			Opportunity/Challenge
Geographic Area	Preferred "Made in Barrie" Scenario	Growth Plan, 2019	
Designated Greenfield Area (D.G.A.)	62	50	City of Barrie is aiming to exceed the Growth Plan, 2019 target and also maximize the average greenfield area density target by allocating high-density growth around the Barrie South GO train station.
Future Designated Greenfield Area (F.D.G.A.) ²	60	50	Given the location attributes of the F.G.D.A. lands in the Salem and Hewitt's Secondary Plans, a slightly lower density is assumed; however it is still well above the Growth Plan, 2019 target.
Total Designated Greenfield Area	62	50	

Source: Watson & Associates Economists Ltd.

¹Reflects community lands only. Excludes employment lands.

²Reflects post-2031 lands in Salem and Hewitt's Secondary Plans.

In accordance with the preferred greenfield density target, the City of Barrie's D.G.A. currently does not have the land capacity to accommodate the greenfield area 2041 population and employment forecast allocated to this area is based on a review of its



current Community Area land supply,¹ and preferred intensification targets.² As summarized in Figure 7-6, by 2041 an additional 9,900 people and jobs are anticipated to be needed on F.D.G.A. lands within the City of Barrie (100,600 less 90,700). At an average density of 60 people and jobs per gross ha, this would require an additional 165 gross ha (408 gross acres) of community lands to be designated.

Figure 7-6
City of Barrie
Designated Greenfield Area (Community Areas)
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	76,000
Employment	24,600
A) Total D.G.A. and Post-2031 Lands	100,600
Total Population and Employment to be Accommodated within Existing D.G.A.	
Population	67,300
Employment	23,400
B) Total D.G.A.	90,700

Land Need	2041
Greenfield Area Forecast Not Accommodated on Existing D.G.A. Lands (A - B)	9,900
Minimum Density Target for New D.G.A. (post-2031 lands) (per gross ha)	60
Community Area Land Need (ha)	165

Source: Watson & Associates Economists Ltd.

¹ The City has a total designated community land supply (vacant and occupied) of 1,459 gross ha (3,605 gross acres).

² Based on 47% of housing growth within the B.U.A. over the 2022 to 2041 period.



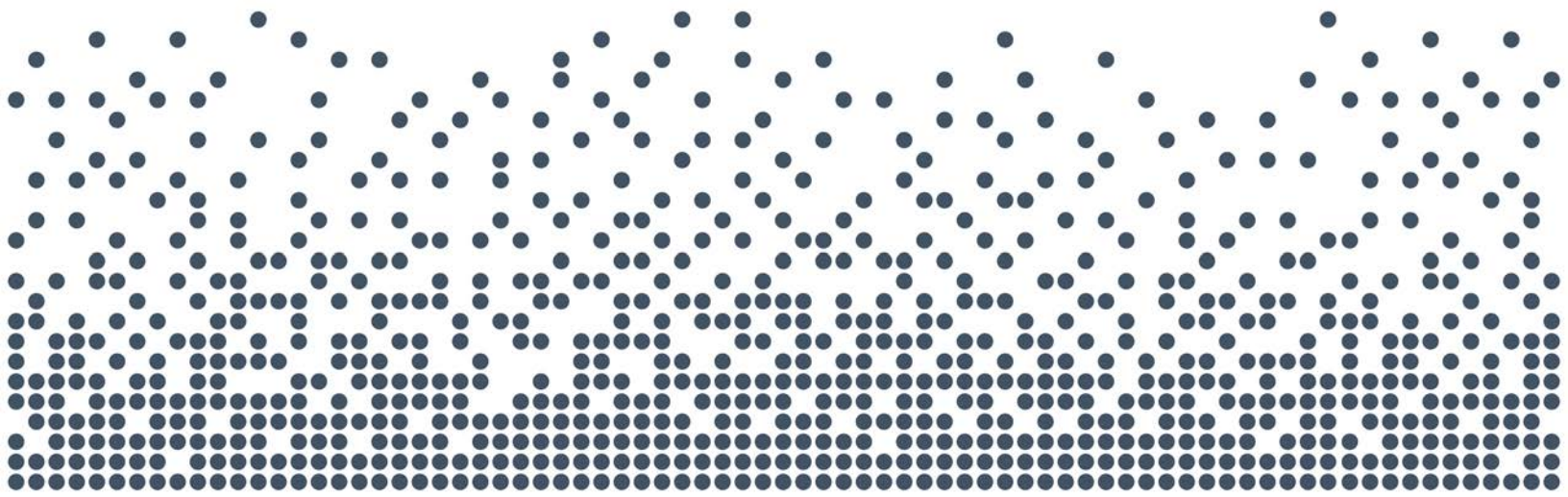
7.5 Total Urban Shortfall by 2041

As previously summarized, the City of Barrie is anticipated to experience a total shortfall of 281 gross ha (694 gross acres) of urban lands over the 2041 forecast horizon. Currently, there are approximately 418 gross ha (1,033 gross acres) of lands designated Special Rural Area within the Salem and Hewitt's Secondary Plans available for potential future urban development subject to long-term need. A summary of forecast urban land needs compared to the gross developable land area designated as Special Rural Area within the City's Secondary Plan Areas is provided below in Figure 7-7.

Figure 7-7
City of Barrie
Identified Community Area and Employment Area Needs
Compared to Designated Rural Area in Salem and Hewitt's Secondary Plans

Land Type	Land Needs, Gross ha	Lands Identified as Designated Special Rural Area in Secondary Plans, Gross ha ¹
Community Area Land (ha)	165	145
Employment Land (ha)	116	273
Total Land (ha)	281	418

¹Based on adjusted Gross Land Area estimate in accordance with the Growth Plan. Environmental take-outs based on the City of Barrie Official Plan G.I.S. data. Other take-outs based on background work prepared by Macaulay Shiomi Howson Ltd., 2013.



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.



Appendix A: Residential Growth Forecast, Made in Barrie Scenario

Development Location	Forecast Period	Low-Density ¹	Medium-Density ²	High-Density ³	Total Households	Population (Including Net Census Undercount)
Urban Growth Centre	2016	336	214	2,078	2,630	4,600
	2021	384	249	2,710	3,340	5,800
	2026	433	310	4,036	4,780	8,300
	2031	433	401	6,848	7,680	13,400
	2036	433	401	8,260	9,090	15,800
	2041	433	401	9,320	10,150	17,600
Intensification Nodes/Corridors	2016	746	575	1,627	2,950	6,400
	2021	750	817	1,952	3,520	7,500
	2026	750	1,178	2,356	4,280	9,100
	2031	750	1,934	2,857	5,540	12,000
	2036	750	2,864	3,754	7,370	16,100
	2041	750	4,431	6,226	11,410	24,500
Other B.U.A.	2016	30,667	7,680	5,529	43,880	125,300
	2021	31,073	7,928	6,346	45,350	126,000
	2026	31,179	8,126	7,006	46,310	126,700
	2031	31,285	8,544	7,510	47,340	129,100
	2036	31,367	8,544	7,973	47,880	132,100
	2041	31,471	8,544	8,586	48,600	134,100
Other D.G.A.	2016	1,947	471	471	2,890	9,200
	2021	2,069	857	819	3,740	11,100
	2026	2,106	1,310	1,954	5,370	14,300
	2031	2,160	1,362	2,194	5,720	15,000
	2036	2,497	1,504	5,268	9,270	21,900
	2041	2,574	1,504	7,798	11,880	26,500
D.G.A. - Salem & Hewitt's Secondary Plan Area	2016	129	-	-	130	300
	2021	3,459	1,429	686	5,570	17,200
	2026	5,484	3,053	1,882	10,420	30,800
	2031	6,279	4,599	3,553	14,430	40,600
	2036	6,814	5,277	3,966	16,060	45,100
	2041	7,587	5,830	4,504	17,920	50,200
City of Barrie	2016	33,825	8,940	9,705	52,470	145,800
	2021	37,735	11,279	12,513	61,530	167,600
	2026	39,952	13,977	17,234	71,160	189,200
	2031	40,907	16,840	22,962	80,710	210,000
	2036	41,860	18,591	29,221	89,670	231,000
	2041	42,814	20,710	36,434	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., 2019. Population allocation of approximately 800 re-distributed from Salem and Hewitt's Secondary Plan Areas to Other B.U.A.

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 B

Vacant Employment Lands by Servicing Status



Appendix B: Vacant Designated Employment Lands by Servicing Status and Planning Policy Area

Built Boundary	Total Vacant - Serviced & Not Serviced				Serviced ¹				Not Serviced			
	Land Area, Gross (ha) ³	%	Count of Parcels	%	Land Area, Gross (ha) ³	%	Count of Parcels	%	Land Area, Gross (ha) ³	%	Count of Parcels	%
Less than 2.5 ha	45	29%	62	78%	41	31%	58	79%	4	17%	4	67%
2.6 ha - 4.9 ha	29	19%	8	10%	29	23%	8	11%	0	0%	0	0%
5 ha and Larger	79	52%	9	11%	60	46%	7	10%	19	83%	2	33%
Total	153	100%	79	100%	130	100%	73	100%	23	100%	6	100%

Designated Greenfield Area	Total Vacant - Serviced & Not Serviced				Serviced ¹				Not Serviced			
	Land Area, Gross (ha) ³	%	Count of Parcels	%	Land Area, Gross (ha) ³	%	Count of Parcels	%	Land Area, Gross (ha) ³	%	Count of Parcels	%
Less than 2.5 ha	95	49%	124	91%	88	60%	105	93%	7	15%	19	79%
2.6 ha - 4.9 ha	33	17%	8	6%	28	19%	7	6%	5	10%	1	4%
5 ha and Larger	65	34%	5	4%	30	21%	1	1%	34	75%	4	17%
Total, Excluding Salem & Hewitt's Secondary Plan Areas	193	100%	137	100%	147	100%	113	100%	46	100%	24	100%
Salem & Hewitt's Secondary Plan Area - Unsubdivided	181	48%							181	80%		
Total	374								227			

City of Barrie	Total Vacant - Serviced & Not Serviced				Serviced ¹				Not Serviced			
	Land Area, Gross (ha) ³	%	Count of Parcels	%	Land Area, Gross (ha) ³	%	Count of Parcels	%	Land Area, Gross (ha) ³	%	Count of Parcels	%
Less than 2.5 ha	140	41%	186	86%	129	47%	163	88%	11	16%	23	77%
2.6 ha - 4.9 ha	62	18%	16	7%	57	21%	15	8%	5	7%	1	3%
5 ha and Larger	143	41%	14	6%	90	33%	8	4%	54	77%	6	20%
Total, Excluding Salem & Hewitt's Secondary Plan Areas	345	100%	216	100%	276	100%	186	100%	69	100%	30	100%
Salem & Hewitt's Secondary Plan Area - Unsubdivided	181	34%							181	72%		
Total	526								250			

Source: Watson & Associates Economists Ltd.

¹Servicing Status based on subdivided parcels (as a result excludes the entire Salem & Hewitt's Secondary Plan Areas), access/frontage to road and water main/water services running through/or adjacent to parcel (based on City of Barrie Water Main and Water Services GIS layer).

²Based on lands not developed as of January 2018. Parcels with a building permit issued for new development prior to January 2018 are considered developed and are excluded from the summary below.

³Gross land area excludes environmental features.



Appendix C

Intensification Potential Sites



Appendix C: Intensification Potential Sites

Low Potential Sites

Map Reference	FID	OP Land Use Type	Current Use	Road Frontage	Access to Road	Intensification Opportunity Potential	Parcel Land Area (Ha)	Existing Building Coverage	Existing Building GFA (sq. ft.)	Existing Building GFA (sq. m.)
A-2	111	General Industrial	Excavating & automotive business	County Rd 90	Yes	Low	2.8	3.0%	9,000	800
A-4	115	General Industrial	Concrete supplier	Tiffin St.	Yes	Low	1.7	3.1%	6,000	600
B-1	134	Restricted Industrial	Metal recycling & processing	Tiffin St.	Yes	Low	1.9	0.3%	1,000	100
B-2	141	General Industrial	Auto Auction	Tiffin St.	Yes	Low	2.0	6.4%	13,000	1,200
B-3	160	General Industrial	Excavation?	Ferndale Dr. N	Yes	Low	1.9	0.8%	2,000	200
B-4	158	General Industrial	Auto repair. Plumbing systems	Ferndale Dr. N	Yes	Low	2.1	10.1%	23,000	2,100
B-5	154	General Industrial	Woodworking. Recycling	Ferndale Dr. N	Yes	Low	2.0	8.0%	17,000	1,600
B-10	129	Restricted Industrial	Metal recycling	Tiffin St.	Yes	Low	2.0	1.9%	4,000	400
B-11	239	General Industrial	Hydraulic & pneumatic services	Brock St.	Yes	Low	2.4	17.2%	44,000	4,100
E-1	646	General Industrial	Car dealership	Mapleview Dr W.	Yes	Low	1.6	16.5%	29,000	2,700
E-2	819	General Industrial	Retail locations	Veterans Dr.	Yes	Low	3.2	18.7%	65,000	6,000
E-3	812	General Industrial	RBC Bank	Mapleview Dr W.	Yes	Low	2.2	3.0%	7,000	700
E-4	807	General Industrial	Unknown	Mapleview Dr W.	Yes	Low	15.4	11.3%	187,000	17,400
E-5	750	General Industrial	Transport truck sales	Mapleview Dr W.	Yes	Low	3.0	2.2%	7,000	700
F-3	737	General Industrial	Unknown	Fairview Road	Yes	Low	2.7	0.5%	1,000	100
F-4	717	General Industrial	Countertop production	Bayview Dr.	Yes	Low	4.7	14.4%	72,000	6,700
F-5	736	Highway 400 Industrial	Purolator shipping	Bayview Dr.	Yes	Low	2.0	13.5%	30,000	2,800
F-6	735	General Industrial	Groundwater system supplier	Bayview Dr.	Yes	Low	2.5	8.3%	22,000	2,000
F-8	641	General Industrial	Paving contractor	Big Bay Point Rd.	Yes	Low	2.5	14.0%	38,000	3,500
F-9	697	General Industrial	Food/liquid transportation	Bayview Dr.	Yes	Low	2.0	3.9%	8,000	700
G-1	701	General Industrial	Engineering, Geoscience, & Petro	Welham Rd.	Yes	Low	1.6	8.3%	14,000	1,300
G-2	585	General Industrial	Unknown	Mayes Ct.	Yes	Low	2.0	16.0%	34,000	3,200
G-4	575	General Industrial	Equipment Rental	Ellis Dr.	Yes	Low	1.7	8.6%	15,000	1,400
G-5	690	General Industrial	Health services	Huron Rd.	Yes	Low	1.9	19.3%	40,000	3,700
H-1	951	General Industrial	Unknown	Bayview Dr.	Yes	Low	10.4	10.0%	113,000	10,500
H-2	617	General Industrial	Diesel engine & transmission rebul	Churchill Dr.	Yes	Low	4.2	3.5%	16,000	1,500
H-3	618	General Industrial	GPS supplier	Churchill Dr.	Yes	Low	2.2	9.6%	22,000	2,000
H-5	676	General Industrial	Contractor rentals	Welham Rd.	Yes	Low	2.0	11.4%	24,000	2,200
I-1	659	General Industrial	Unknown	Welham Rd.	Yes	Low	4.6	9.8%	48,000	4,500
I-2	953	Restricted Industrial	Concrete supplier	Saunders Rd.	Yes	Low	2.0	4.6%	10,000	900
I-3	543	General Industrial	Pipe & tube supplier	Welham Rd.	Yes	Low	2.4	6.1%	16,000	1,500
J-2	193	Highway 400 Industrial	Industrial material production	Morrow Rd.	Yes	Low	3.7	18.6%	75,000	7,000
Total							99		1,014,000	94,100

Source: Watson & Associates Economists Ltd.



Appendix C: Intensification Potential Sites

High Potential Sites

Map Reference	FID	OP Land Use Type	Current Use	Road Frontage	Access to Road	Intensification Opportunity Potential	Parcel Land Area (Ha)	Existing Building Coverage	Existing Building GFA (sq. ft.)	Existing Building GFA (sq. m.)
A-1	108	Restricted Industrial	Building material creation	Dunlop St. W	Yes	High	10.3	2.1%	23,000	2,100
A-3	116	General Industrial	Hose & hydrolic repair. Waterwork	Tiffin St.	Yes	High	5.5	4.4%	26,000	2,400
B-6	167	General Industrial	Contruccion and fuel supply.	Sarjeant Dr.	Yes	High	3.6	7.2%	27,000	2,500
B-7	844	General Industrial	Transportation & warehousing	Elliott Ave	Yes	High	2.4	7.3%	19,000	1,800
D-2	963	General Industrial	Unknown	Essa	Yes	High	3.1	1.3%	4,000	400
D-3	377	General Industrial	Television broadcasting (CTV)	Beacon Rd.	Yes	High	8.7	3.1%	29,000	2,700
F-1	929	Business Park	General office	Bayview Dr.	Yes	High	13.3	0.4%	6,000	600
F-7	640	General Industrial	Garden centre	Bayview Dr.	Yes	High	3.3	5.4%	19,000	1,800
G-3	574	General Industrial	Roofing. Millworking	Huronian Rd.	Yes	High	4.0	16.0%	70,000	6,500
H-6	680	General Industrial	Granite & marble supplier	Welham Rd.	Yes	High	2.6	5.2%	15,000	1,400
Total							57		238,000	22,200

Source: Based on a desktop review by Watson & Associates Economists Ltd., 2019.



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

City of Barrie

Addendum Report - Final

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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	Huronian/Mapleview 5 - 434205000604700	D.G.A - Employment Area	2	4	3
2	Huronian/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.

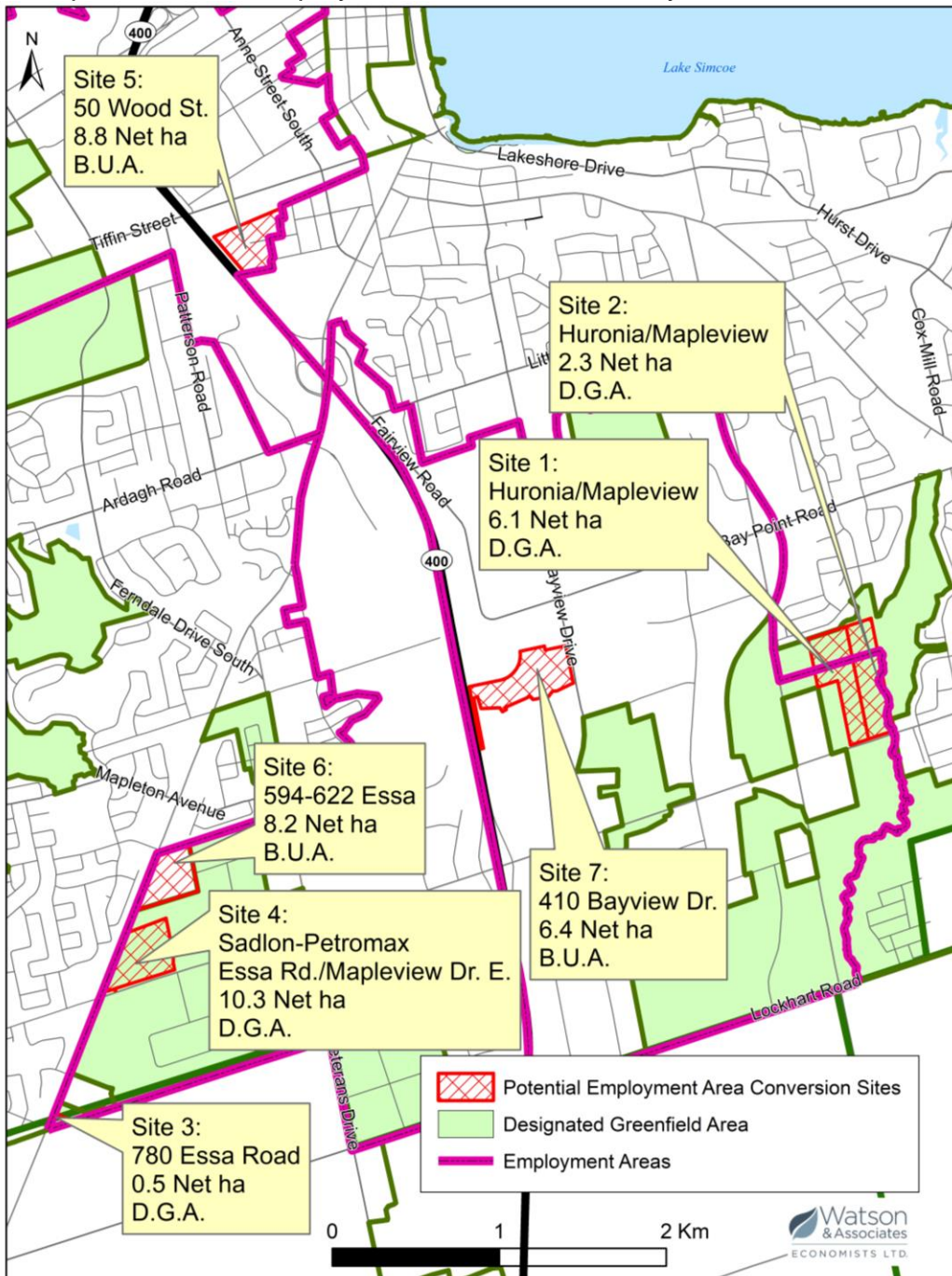
²Based on the parcel land area of conversion and estimate of land area for local infrastructure based on current land assembly. Parcels Smaller than 3 ha: C = A x 1.57; and Parcels larger than 3 ha: C = A x 1.40.

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
Huronion/Mapleview 5 - 434205000604700	2.3	1	4	191	164	27	66	16	17	34
Huronion/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.

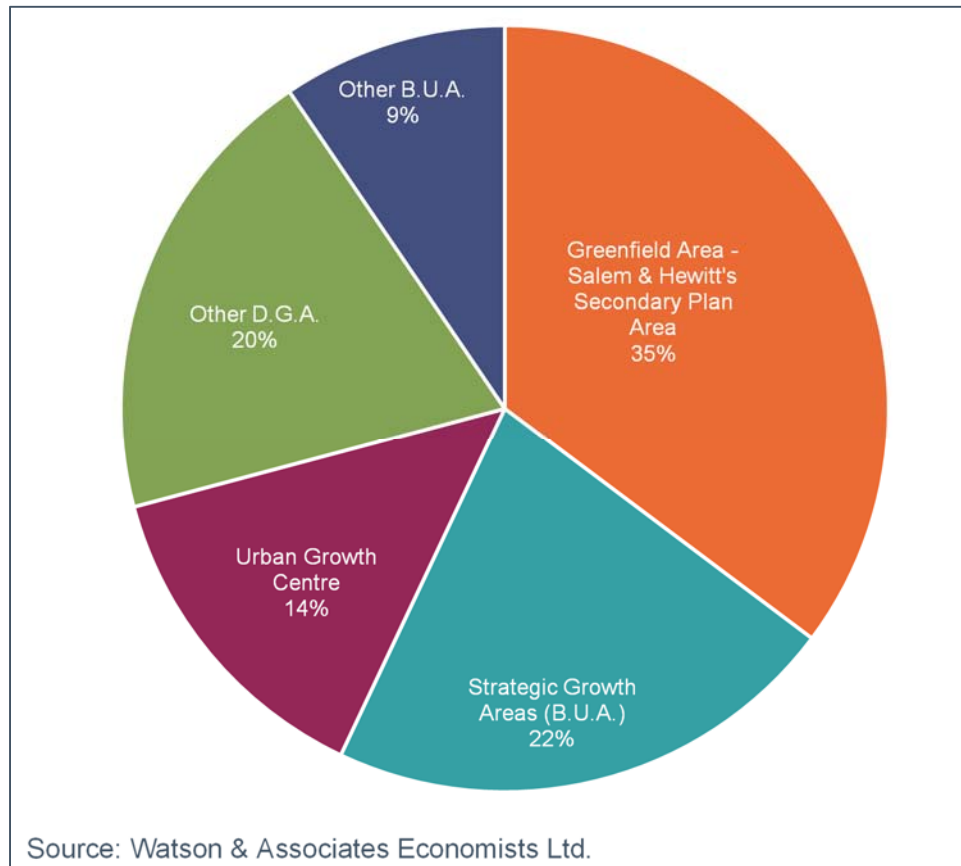
²Greenfield Area includes D.G.A. and undesignated D.G.A. (Special Rural Policy Area, Post-2031).

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.

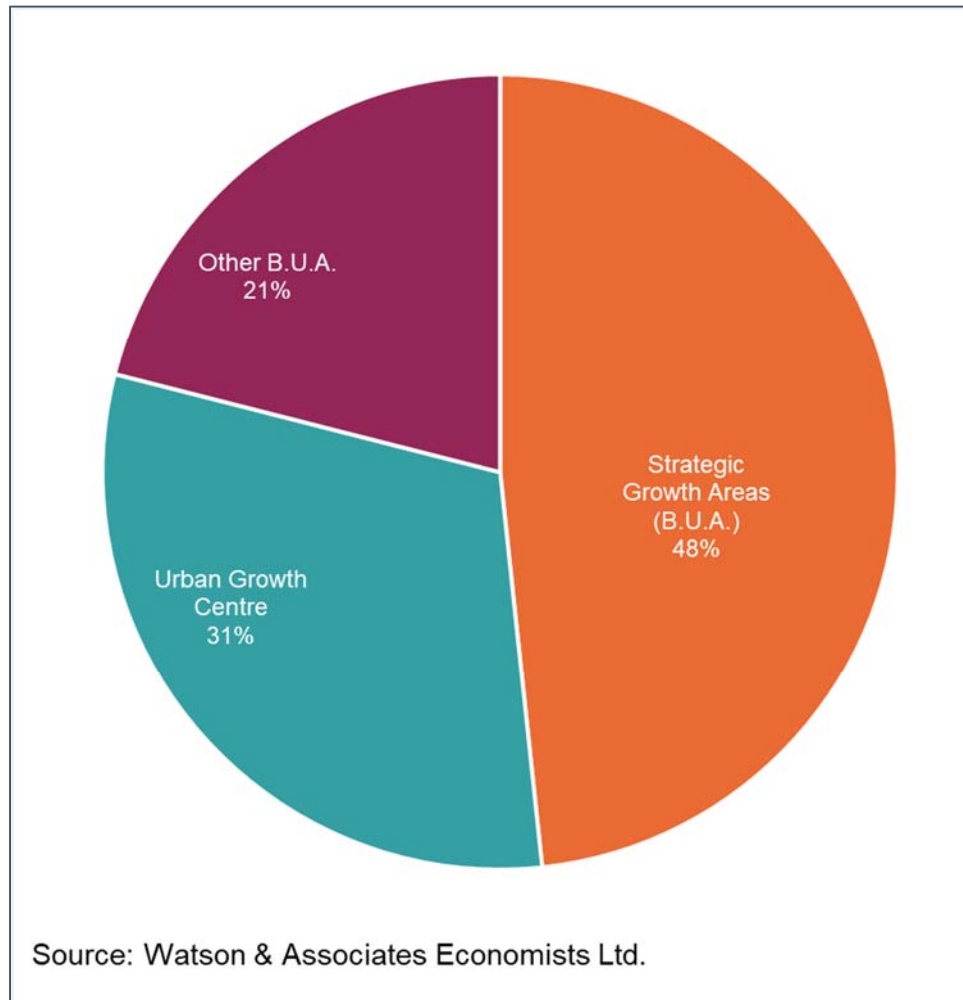
Figure A-9¹
City of Barrie
Population Growth Forecast by Area
2021 to 2041



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%

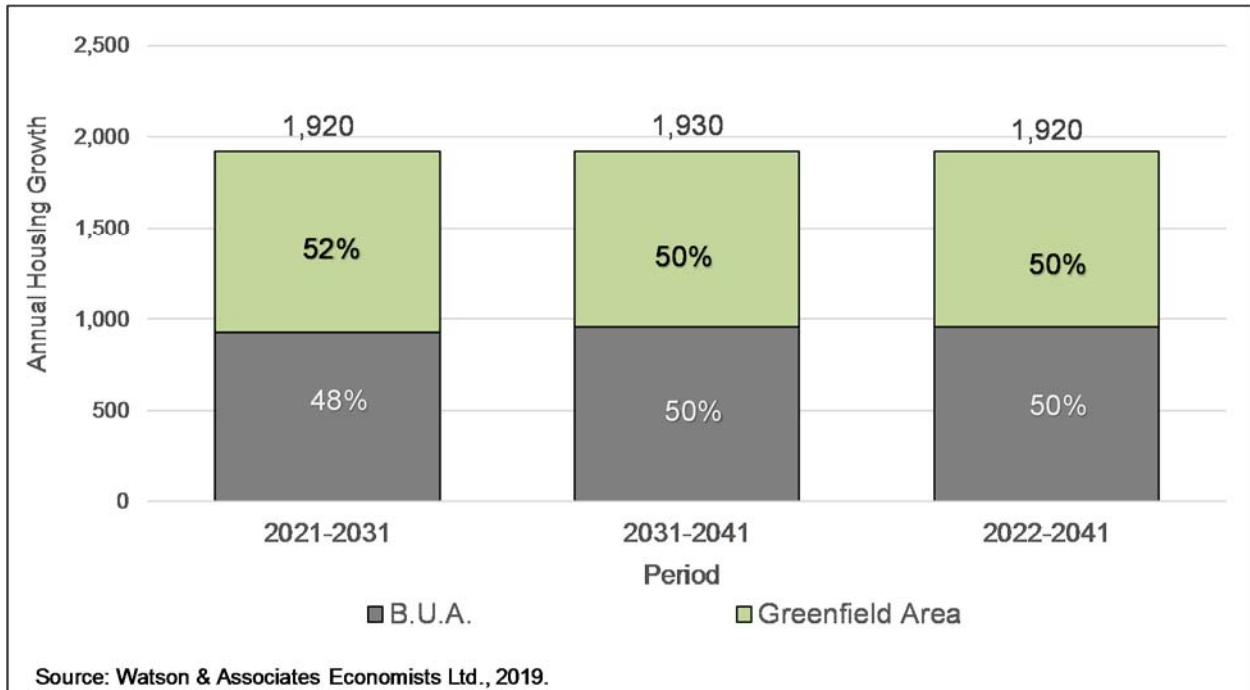
Source: Watson & Associates Economists Ltd.

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 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

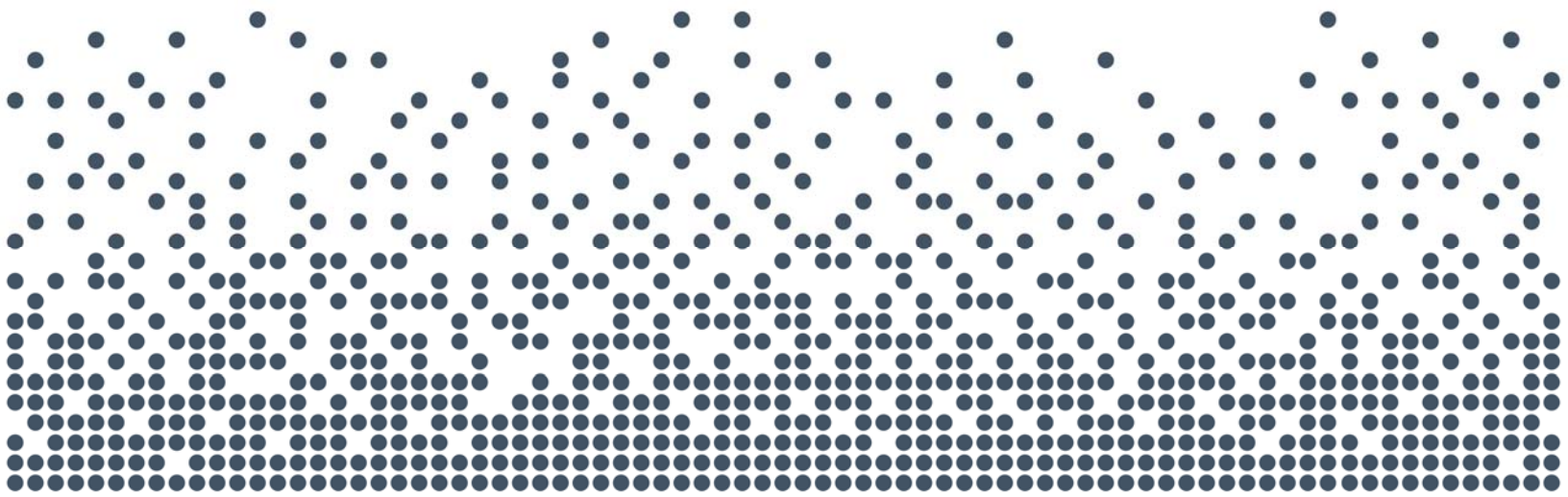
Total Greenfield Area Population and Employment	2041
Forecast Population and Employment at 2041 in D.G.A. and post-2031 lands	
Population	75,200
Employment	24,600
A) Total D.G.A. and Post-2031 Lands	99,800
Total Population and Employment to be Accommodated within Existing D.G.A.	
Population	67,700
Employment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

To: Michelle Banfield, City of Barrie
From: Rory Baksh, Partner; Kelly Martel, Associate
Date: May 5, 2021
Subject: Completion of Barrie Land Needs Analysis to 2051
Our File: 18-8307

1. A 'Made in Barrie' solution to addressing land needs to 2051

In 2018, the City of Barrie initiated a Municipal Comprehensive Review and New Official Plan project in order to determine the City's conformity to A Place to Grow: A Growth Plan for the Greater Golden Horseshoe ("Growth Plan") and development of Official Plan policies to guide the City's development to the 2041 planning horizon. In August of 2020, the Province issued Amendment 1 to the Growth Plan, which requires Barrie to use 2051 as the horizon year for long-term planning. By this time, Barrie had already completed the work required to determine the City's Growth Management framework for 2041, including the Land Needs Assessment (completed in May of 2019, with an addendum memo prepared in May of 2020). As a result, a 10-year gap exists between the work completed to date and the revised direction of the Province to plan for a 2051 horizon year. This memo documents the continuation of the work to bring the Land Needs Assessment (LNA) to the 2051 horizon year.

At the time of the release of Amendment 1 to the Growth Plan, the following conclusions had already been established through the City's Land Needs Assessment:

- City Council endorsed a 'balanced' approach to growth for the planning horizon set out in the New Official Plan, directing 50% of growth to occur by way of intensification within the Built-up Area (BUA) and that a minimum density target of 62 people and jobs per hectare be achieved within the City's Designated Greenfield Areas (DGAs). This, in fact, exceeds the requirements of the Growth Plan with respect to density targets in DGAs (the 50% intensification meets the Growth Plan requirements);
- In order to accommodate the forecast growth to the 2041 planning Horizon, an expansion of the City's settlement area boundary is required;
- The expansion of the settlement area boundary would not reach the full extent of the City's municipal boundary -- there is enough land to accommodate growth to 2041, with a limited supply of land remaining that could be developed post-2041.

Work conducted for the City's Land Needs Assessment also offered the following insight for the future:

- Sometime after 2041, once all greenfield lands are built out, the City of Barrie becomes an 'intensification only' City; and,

- The creation of additional greenfield land for Barrie after all available lands are built out would only be possible through adjusting the City's municipal boundary (i.e., through an annexation), which the City has no intention of pursuing at this time.

The City sought the advice of the Ontario Growth Secretariat (OGS) and Ministry of Municipal Affairs and Housing (MMAH) on how to proceed with its LNA in a way that conforms with forecasted growth to 2051. Given the constraint of available greenfield land post-2041 noted above, a 'Made-in-Barrie' approach to continue the LNA to the 2051 horizon year that is in keeping with the general spirit and intent of the new LNA methodology was discussed and agreed upon, with an understanding that an adequate housing mix must be determined. The approach as communicated to the Province was:

1. *Compute how many persons and jobs (together and separately) will yield from the remaining developable greenfield lands in Barrie during the latter 10 years – i.e., those greenfield lands that would build out from 2041 to 2051 – at the minimum required density in the 2020 Growth Plan.¹*
2. *Compute how many persons, in the latter 10 year period from 2041 to 2051: (a) would be housed in the post-2031 greenfield lands, and (b) would not be housed in the greenfield lands so would have to be housed within the City's existing built-up area.*
3. *Compute the number of housing units based on the persons in 2a and 2b by applying a fixed PPU for the 10 year period from 2041 to 2051 (only an aggregate number of housing units is needed to inform high-level infrastructure planning, and a breakdown by density type is not computed at this time).*
4. *Compute how many Employment-lands jobs, in the 10 year period from 2041 to 2051: (a) would be accommodated in the remaining 2041-2051 greenfield lands, and (b) would not be accommodated on greenfield Employment lands so those jobs could be assumed to be provided through 'employment intensification' within the city's existing built-up area.*
5. *Following from 4a and 4b, compute the same in terms of hectares using a fixed jobs-per-hectare assumption.*
6. *Similar to 4 and 5, but for the non-Employment lands jobs."*

It was also noted in the communication to the Province that, *"this proposed methodology uses a different sequence (as contemplated on Page 5 of the provincial methodology) but still aims to arrive at the appropriate results."*

The following sections of this memo document the continuation of the LNA that bring the work out to the 2051 horizon year. Ultimately, the findings of this analysis demonstrates how the City of Barrie will accommodate the Growth Plan's forecast residential and employment growth to 2051 and achieve (or exceed) the targets set out in the Growth Plan for both the BUA and DGA.

It should be noted that while the above approach lists 6 steps, the actual analysis in this memo has 15 steps (15 tables) so that the computations can be easily understood using a step-by-step discussion.

¹ Note: A higher density than the Growth Plan minimum is used in the actual analysis documented in this memo because this density figure was previously supported by the City through its LNA work to 2041.

2. An additional 17,787 residential units to be accommodated between 2041 and 2051

The work completed by Watson and Associates Economists Limited (Watson) for the City of Barrie applied the following residential forecast for the 2041 planning horizon:

- 253,000 persons

Amendment 1 to the Growth Plan extended the planning horizon an additional ten years, from 2041 to 2051, and introduced the following new forecast:

- 298,000 persons

This represents an overall increase of 152,000 persons for the 2022-2051 time period, and an additional 45,000 persons for the 2041-2051 horizon. Utilizing a blended persons per unit (PPU) of 2.53, as established by Watson through the 2041 Land Needs Analysis work, an additional 17,787 residential units will be required to be accommodated within the City of Barrie between 2041 to 2051 in order to meet the Provincial target population forecast (refer to **Table 1**).

Table 1: Units to be Accommodated 2041-2051 based on 2051 Population Forecast

2051 Population Target from the Growth Plan	298,000 persons
<i>subtract</i> Population to 2041 (Watson)	253,000 persons
Total population to be accommodated within the 2041 to 2051 time period	45,000 persons
Conversion of population to units, based on blended 2.53 PPU per Watson report	17,787 units

3. Barrie will need to accommodate a total of 117,747 residential units to 2051

The work completed by Watson for the 2021 to 2041 planning horizon concluded that in order to achieve the forecast population of 253,000 persons by 2041, an additional 99,960 units would need to be introduced to the City's housing inventory. As noted in Section 2, above, the last ten years of population requires an additional 17,787 units be added. Taken together, the total housing unit forecast to the 2051 planning horizon is 117,747 units (see **Table 2**, below). This quantum represents the 'control total' of housing for this exercise.

Table 2: Establishing the 2051 Housing Unit Control Total

Watson Housing Unit Forecast for the 2021 to 2041 time period	99,960 units
<i>add</i> units to be accommodated within the 2041 to 2051 period	17,787 units
Total Housing Unit Forecast to the 2051 period (i.e. control total)	117,747 units

4. **The post-2041 DGA yields are 1,667 persons and 580 jobs within Community Areas and 5,075 jobs within Employment Areas²**

Figure 1 provides a map identifying the remaining DGA lands available for residential (Community Area) and employment development (the ‘Post-2041 Lands’).

Based on the land area remaining within the Post-2041 Lands, approximately 36 hectares is designated for residential development and 145 hectares is available for employment development; in other words, there is 36 hectares of Community Area land and 145 hectares of Employment land.

Figure 1: The Post-2041 Lands

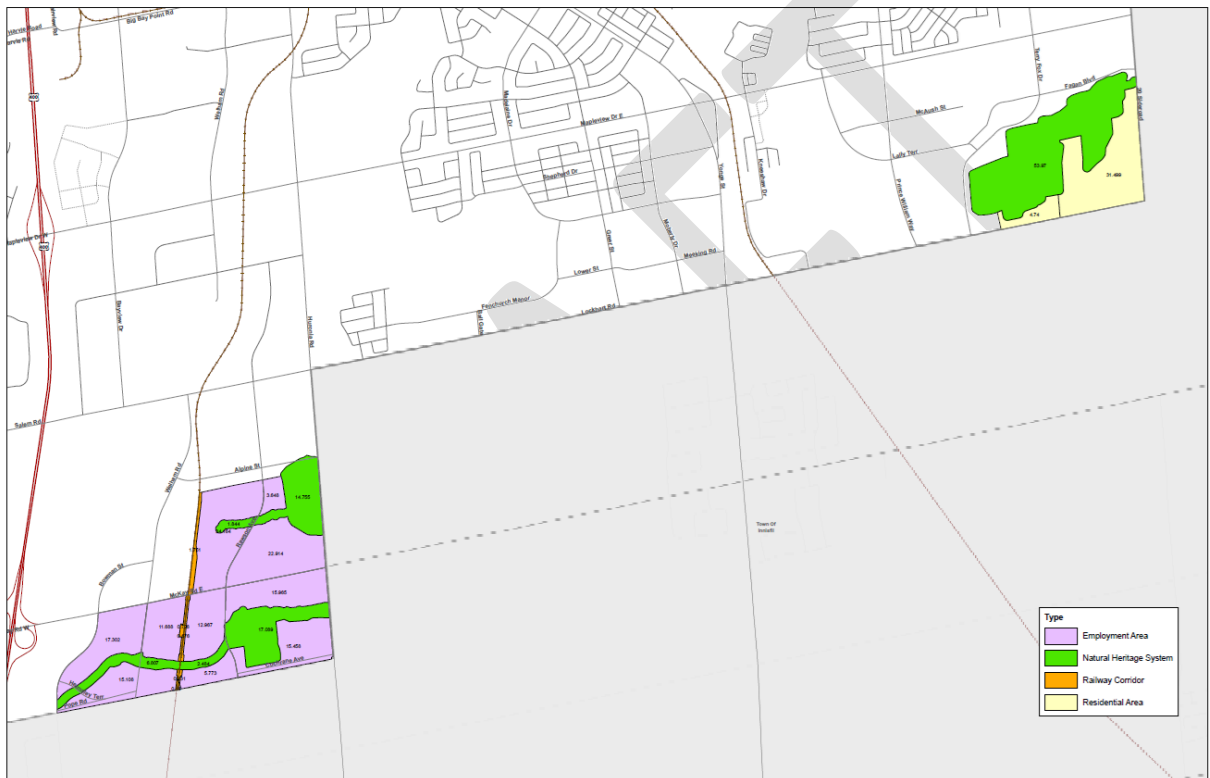


Table 3 identifies the development yields for both Community Area and Employment Area for the Post-2041 Lands. 1,667 persons and 580 jobs will be accommodated within the Post-2041 Lands Community Areas, which equates to 62 persons and jobs per hectare. Within the Post-2041 Lands Employment Areas, 5,075 jobs will be accommodated which equates to 35 jobs per hectare.³

² Please see Table 13 for further discussion on the total number of Employment Area jobs.

³ Please see Table 13 for further discussion on the total number of Employment Area jobs.

Table 3: Development Yields, Post-2041 Lands

Development Yields, Community Area (Post-2041 Lands) and Employment Area (Post-2041 Lands)	Post-2041 Land Area	Density	Persons and Jobs
Yield from Community Area, Persons	36 ha	46 p/h	1,667 persons
Yield from Community Area, Jobs		16 j/h	580 jobs
Subtotal Yield from Community Area	--	--	2,247 p+j combined
Yield from Employment Area, Jobs	145 ha	35 j/h	5,075 jobs⁴
Total Yield from both the Community Area and Employment Area	181 ha	---	7,322 p+j combined

5. **43,333 persons will need to be accommodated elsewhere in Barrie in order to achieve the population forecast set out in the Growth Plan**

Amendment 1 to the Growth Plan requires that municipalities plan to the 2051 forecast set out in Schedule 3 of the Growth Plan. In the case of Barrie, this forecast is 298,000 persons. 253,000 persons have already been accounted for through the previous work Watson completed to the 2041 horizon. Further, 1,667 persons will be accommodated within the Post-2041 Lands. Accordingly, an additional 43,333 persons will need to be accommodated elsewhere in Barrie in order to achieve the 2051 Growth Plan Population Forecast (See Table 4).

Table 4: How Growth Plan Targets are Met, Community Area

2051 Population Control Total	298,000 persons
subtract Population to 2041 (Watson Report)	253,000 persons
subtract Community Area Persons post-2041, from Table 3 above	1,667 persons
Persons that will need to be accommodated elsewhere in Barrie	43,333 persons

6. **The Post-2041 Lands can accommodate 659 residential units, with the remaining 17,128 units to be distributed throughout the BUA and across the DGA to the 2051 planning horizon**

In order to determine the unit equivalent of the 1,667 persons to be accommodated within the post-2041 Community Area Lands, a PPU factor of 2.53 was applied based on Watson's previous analysis.

⁴ Please see Table 13 for further discussion on the total number of Employment Area jobs.

When this factor is applied, it can be concluded that the Post-2041 Lands can accommodate 659 units within the Community Area (see **Table 5**).

Table 5: Community Area Housing Units (Post-2041 Lands)

Community Area Persons post-2041 (from Table 1 above)	1,667 persons
Persons per unit at 2041 (from Watson report)	2.53 persons per unit
Number of housing units in the Community Area post-2041	659 units

As noted previously, a total of 17,787 units are required to be accommodated within the 2041-2051 time period. In accordance with Table 5, above, 659 of these units will be developed on the Post-2041 Community Area Lands, resulting in 17,128 units remaining to be accommodated elsewhere in Barrie. In order to conform to the policies of the Growth Plan, 50% of the anticipated growth must be accommodated within the BUA. Accordingly, a minimum of 8,893 units must be developed within the BUA (see **Table 6**).

Table 6: Residential Intensification

Control total	117,747 units
<i>subtract</i> Number of housing units forecasted to 2041 (from Watson report)	99,960 units
Number of housing units, 2041 to 2051	17,787 units
<i>subtract</i> Number of housing units accommodated in the Community Area post-2041 (from Table 5 above)	659 units
[a] Number of housing units to be accommodated elsewhere in Barrie	17,128 units
<i>Test</i>	
Growth Plan minimum requirement of all new housing units to be accommodated by intensification in the Built-Up Area	50%
[b] Minimum number of housing units that must be accommodated by intensification in the Built-Up Area, 2041 to 2051	8,893 units
Test: Is there sufficient residential intensification possible to meet the Growth Plan --- is [a] greater than [b]?	Yes

With 659 units accounted for on the Post-2041 Lands and 8,893 units accounted for within the BUA through intensification, an additional 8,234 units will need to be accommodated within DGA to the 2051 planning horizon (**Table 7**).

Table 7: Housing Units to Be Accommodated Elsewhere in the DGA, 2041 to 2051

Number of housing units, 2041 to 2051 (from Table 1 above)	17,787 units
<i>subtract</i> Number of housing units accommodated in the Community Area post-2041 (from Table 5 above)	659 units
<i>subtract</i> Number of housing units accommodated through minimum intensification post-2041 (from Table 6 above)	8,893 units
Number of housing units to be accommodated elsewhere in the DGA to 2051	8,234 units

7. There are sufficient opportunities for residential intensification within the BUA beyond the minimum target set out in the Growth Plan

An intensification analysis was previously completed by Watson through the 2041 LNA exercise, which identified that the BUA had an intensification potential supply of 38,440 units. Of these potential 38,440 units, Watson’s analysis indicated that 18,230 intensification units would develop over the 2021-2041 horizon. As noted in Table 6, above, an additional 8,893 intensification units are required within the BUA in order to satisfy the minimum target for intensification set out in the Growth Plan. This demand is easily accommodated, and there remains an available supply of 11,317 units of intensification (**Table 8**).

Table 8: Quantum of On-the-Ground Intensification

Total 'on-the-ground' available intensification unit potential	38,440 units
<i>subtract</i> Number of intensification housing units forecasted to 2041 (from Watson report)	18,230 units
<i>subtract</i> Intensification housing units, 2041 to 2051 (from Table 6 above)	8,893 units
[c] Remaining on-the-ground intensification unit potential	11,317 units
<i>Test</i>	
Is there a sufficient supply of residential intensification units to meet the demand to 2051 --- is [c] greater than zero?	Yes

8. Up to 8,234 units (or an additional 6 units per hectare) is expected to be absorbed across the DGA to the 2051 planning horizon

Watson’s analysis identified that the total Community Area lands for all of Barrie’s DGA, including the Post-2041 lands, is 1,460 hectares.

The City’s proposed Official Plan policy framework allows for and encourages individual development applications to exceed the density targets for the DGA. This provides flexibility for new development to occur at higher densities at any time out to the 2051 planning horizon. This analysis therefore anticipates that up to an additional 8,234 units would be accommodated by absorbing them into the

DGA. Taken together, the development of these additional units would result in an additional 6 units per hectare, or 14 persons per hectare, over the fullness of time (**Table 9**).

Table 9: Resultant Additional Residential Density Increase for the DGA

Total DGA Land to 2051 (from Watson report)	1,460 ha
Number of additional housing units to be accommodated across the DGA to the 2051 planning horizon (from Table 8 above)	8,234 units
Resultant residential density increase across the entire DGA	Additional 6 units per ha across the entire DGA*
Resultant residential density increase across the entire DGA, converted to persons based on 2.53 PPU	Additional 14 persons per ha across the entire DGA*

**Note: the resultant residential density increase is interrelated with intensification. If the intensification target is set higher than the Provincial minimum of 50% then the resultant residential density increase across the DGA will go down.*

It is important to note that this assumes the intensification within the BUA remains at 50%. As demonstrated in **Table 8**, above, there is ample opportunity to further intensify within the BUA with up to 11,317 additional units of supply. Should the City determine that increasing the intensification target above 50% is appropriate, then the resultant DGA residential density increase of an additional 6 units per hectare / 14 persons per hectare would decrease.

9. **The housing mix for the 2041-2051 increment is in alignment with the mix established in Watson's analysis for the 2021-2041 period**

With respect to housing mix, the Watson analysis indicated that the housing mix for Low Density, Medium Density and High Density development within the DGA would be 23%, 25% and 52% respectively. When this housing mix is applied to the Post-2041 Lands, the result is that 152 Low Density, 165 Medium Density and 343 High Density units will be developed (**Table 10**).

Table 10: Community Area Housing Mix, 2041 to 2051

	Low Density	Medium Density	High Density
Housing mix to 2041 for the Designated Greenfield Area (from Watson Report)	23%	25%	52%
659 units from Table 5 above, broken down by housing type based on the housing mix	152 units	165 units	343 units

As noted above, to accommodate the forecast population to 2051, an additional 8,234 units will need to be developed across the DGA over the fullness of time. The DGA housing mix proposed by Watson, when applied to these units, results in an additional 1,894 Low Density, 2,059 Medium Density and 4,282 High Density units to be developed over the fullness of time (**Table 11**).

Table 11: Mix of Additional Units to Be Accommodated Across the DGA to the 2051 Planning Horizon

	Low Density	Medium Density	High Density
Housing mix to 2041 for the Designated Greenfield Area (from Watson Report)	23%	25%	52%
8,234 units from Table 9 above, broken down by housing type based on the housing mix	1,894 units	2,059 units	4,282 units

Within the BUA, Watson’s report indicates that the housing mix for Low Density, Medium Density and High Density development to be 2%, 24% and 74% respectively. When this housing mix is applied to the BUA for the 2041-2051 increment, the result is an additional 178 Low Density, 2,134 Medium Density and 6,581 High Density units for the 2041-2051 increment (**Table 12**).

Table 12: Intensification Housing Mix, 2041 to 2051

	Low Density	Medium Density	High Density
Housing mix to 2041 for intensification within the Built-Up Area (from Watson Report)	2%	24%	74%
8,893 units as the minimum that must be accommodated by intensification (from Table 6 above), broken down by type based on the mix	178 units	2,134 units	6,581 units

10. An additional 5,481 employment related jobs are expected to the 2051 planning horizon, through development of the Post-2041 Employment Lands and intensification of Employment lands

Based on the Watson analysis, it is understood that an overall employment density of 35 jobs per hectare is reasonably achievable on DGA Employment Lands. Given the land area of the Post-2041 Employment Lands, it is expected that a total of 5,075 jobs can be accommodated. Additionally, it is expected an additional 406 jobs will result through intensification of Employment lands to the 2051 planning horizon. In total, an additional 5,481 employment related jobs are expected to the 2051 planning horizon (**Table 13**).

Table 13: Intensification of Employment Jobs on Employment Lands to 2051

Employment Area jobs post-2041, from Table 3 above	5,075 jobs
Allow 8% of employment to be accommodated on existing lands through intensification (from Watson report) to 2051	406 jobs
Total employment jobs on Employment lands to 2051	5,481 jobs

It should be noted that the 5,481 jobs on Employment lands represent a combination of predominantly major employment-type jobs and some population-related type jobs that together occur on Employment lands. This is consistent with how the work was done by Watson for the LNA work to the 2041 horizon year.

11. The Growth Plan population and employment targets can be achieved

The Growth Plan 2019, as amended, provides a number of policy directions that municipalities must demonstrate with respect to managing growth, including the following:

- Demonstrating that minimum intensification and density targets can be achieved; and,
- Demonstrating that population and employment forecasts set out in Schedule 3 are met or exceeded within the horizon of the plan.

Sections 4 and 6 of this memo, specifically, provide the technical analysis and supplementary information respecting the achievement of both the DGA Community Area density target (62 people and jobs per hectare, whereas 50 people and jobs per hectare is required) and the BUA intensification target (50%, which can be achieved and in fact has the potential to be exceeded when the additional opportunities for intensification are considered).

With respect to the population target, when the additional 17,787 units required to meet the post-2041 Community Area needs are converted into persons with a 2.53 PPU applied, the result is an additional 45,000 persons. Watson's analysis indicates Barrie will reach a population of 253,000 person by 2041 and Schedule 3 to the Growth Plan, as amended, indicates Barrie will reach a population of 298,000 persons by 2051. The additional 45,000 persons added through the 2041-2051 increment brings the City to a total forecast population of 298,000 persons by 2051, which is in accordance with Schedule 3 of the Growth Plan (**Table 14**).

Table 14: How the Growth Plan Population Target is Achieved

Number of housing units to be accommodated in the Community Area post-2041	659 units
<i>add</i> Number of housing units to be accommodated in the Built-Up Area post-2041	8,893 units
<i>add</i> Number of housing units to be accommodated elsewhere in the DGA post-2041	8,234 units
Total number of housing units accommodated in Barrie post-2041	17,787 units
<i>Test</i>	
Convert 2041-2051 housing units to persons using 2.53 PPU, to determine 2041-2051 population	45,000 persons
<i>add</i> Watson 2041 Population Forecast	253,000 persons
[d] Total population accommodated by this analysis	298,000 persons
[e] Growth Plan 2051 Population Forecast per Schedule 1	298,000 persons
Test: Does the analysis for Barrie meet the Growth Plan -- is [d] equal to or greater than [e]?	Yes

Examining the employment target established in the Growth Plan, 150,000 jobs are projected to the 2051 horizon. Watson's analysis indicates Barrie will reach 129,000 jobs by 2041.

As demonstrated in this analysis, Barrie can accommodate the Growth Plan forecast to 2051. The Post-2041 Employment Area Lands will yield 5,075 jobs together with an additional 406 jobs achieved through intensification on Employment lands, resulting in a total of 5,481 employment jobs. In addition to the 580 jobs forecast for the Post-2041 Community Area Lands, 14,940 population related jobs are expected to be accommodated within the BUA and DGA to the 2051 planning horizon. Taken together, the additional 21,001 employment and population related jobs brings the City to a total forecast of 150,000 jobs by 2051, which is in accordance with Schedule 3 of the Growth Plan (**Table 15**).

Table 15: How Growth Plan Targets are Met for Employment

2051 Employment Target from the Growth Plan	150,000 jobs
<i>subtract</i> Jobs to 2041 (from Watson report)	129,000 jobs
<i>subtract</i> Community Area jobs post-2041, from Table 3 above	580 jobs
<i>subtract</i> Total Employment Area jobs post-2041, from Table 13 above	5,481 jobs
Jobs that will need to be accommodated elsewhere in Barrie (note: these will be population-related jobs)	14,940 jobs

There is a further observation that can be made based on the finding of 14,940 population-related jobs that need to be accommodated in Barrie to the 2051 planning horizon. As population-related jobs, it is likely that these jobs will emerge across the City – within the BUA (as new stores and services serving that housing intensification), as additional employees in existing shopping malls, plazas, and commercial

buildings serving Barrie's growing population, and as employees in new commercial development in the greenfield area. Based on data provided by the City, there are 4,253 hectares of land in the BUA (excluding employment areas, major utility corridors, the Highway 400 corridor, and the natural heritage system). That, in addition to the 1,460 hectares in the entirety of the DGA, means the additional population-related jobs could be accommodated across a total of 5,713 hectares to 2051. This works out to a modest 3 jobs per hectare of additional population-related employment to 2051.

With the understanding gained from this analysis, a picture can be drawn of Barrie's resultant DGA density for its greenfield Community Area to the horizon year of 2051. The baseline begins with the 62 persons and jobs per hectare from Watson's work, and to this is added the additional 14 persons per hectare across the entire DGA (from Table 9) and the additional 3 jobs per hectare (noted in the paragraph above), to arrive at a total 79 persons and jobs combined per hectare – with the proviso that this number could be less if higher residential intensification is achieved within the BUA (i.e., the 50% intensification target is exceeded).

It is therefore recommended that the Community Area DGA density in Barrie's New Official Plan be set at **79 persons and jobs per hectare**.

A Community Area DGA density of 79 persons and jobs combined per hectare is within reason when compared to the Burlington case study presented in the work of the Canadian Urban Institute's (CUI) "Visualizing Density" report. Figure 2 on the next page illustrates the Burlington case study area at slightly less density of 77 persons and jobs per hectare. A mix of housing can be observed, as well as mature trees, open space, a variety of multi-storey buildings, and some surface parking. Notably, this density of 77 persons and jobs per hectare in Burlington is achieved with a modest number of tall buildings (approximately 20 storeys high) dispersed across the area.

Figure 2: 77 people and jobs per gross hectare in Burlington from the CUI’s “Visualizing Density” report



12. **Closure**

This analysis in this memo has completed the Land Needs Assessment for Barrie out to the horizon year of 2051 as required by the Growth Plan. Based on the findings in the memo that the Growth Plan tests are met then these results will be incorporated as targets into the City’s New Official Plan. This will help ensure that the City’s New Official Plan will be in conformity with the Growth Plan for the 2051 horizon year.