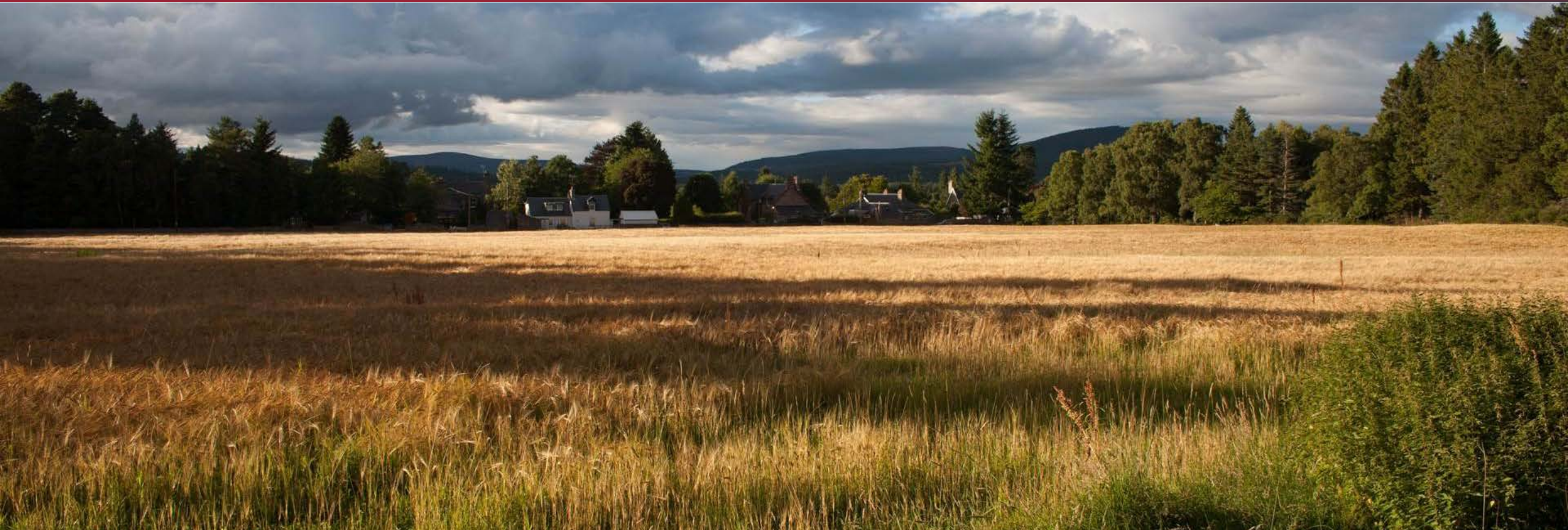


# JOINT LAND NEEDS ANALYSIS AND STUDY

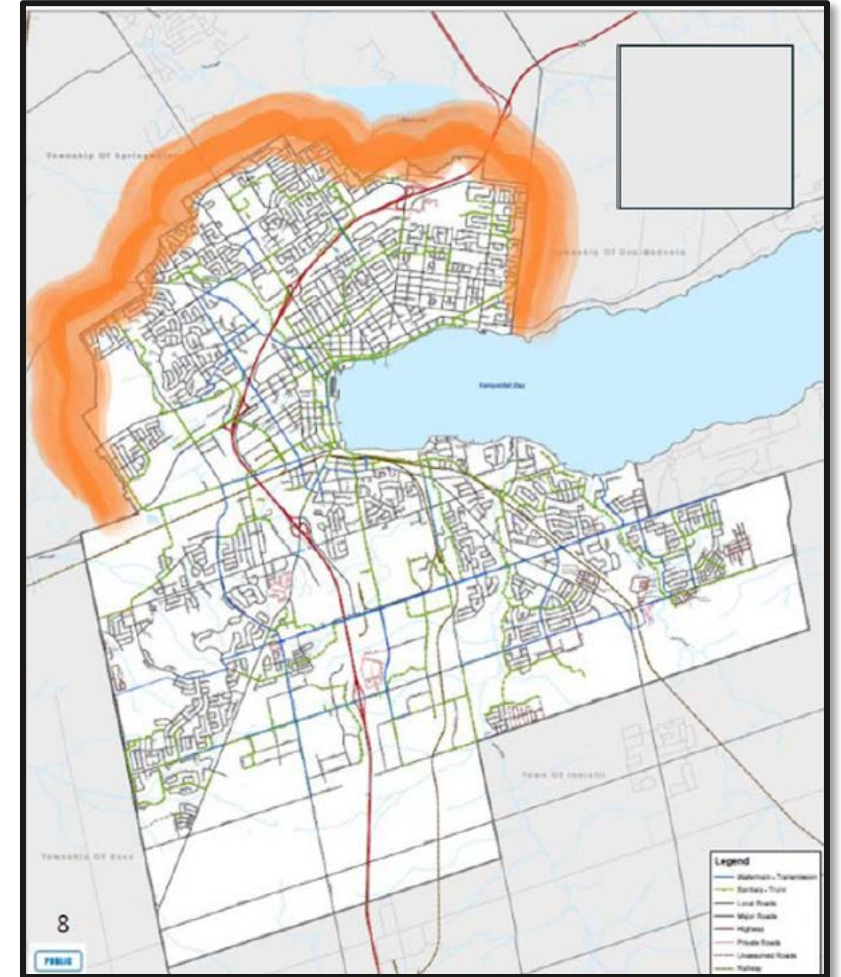
## Stage 2 Summary Presentation



December 11, 2024

# Key Questions in Joint Land Needs Study

1. Do Barrie, Oro-Medonte and Springwater need additional Community Area and/or Employment Area by 2051?
2. If so, what options are available within the Study Area to accommodate growth?

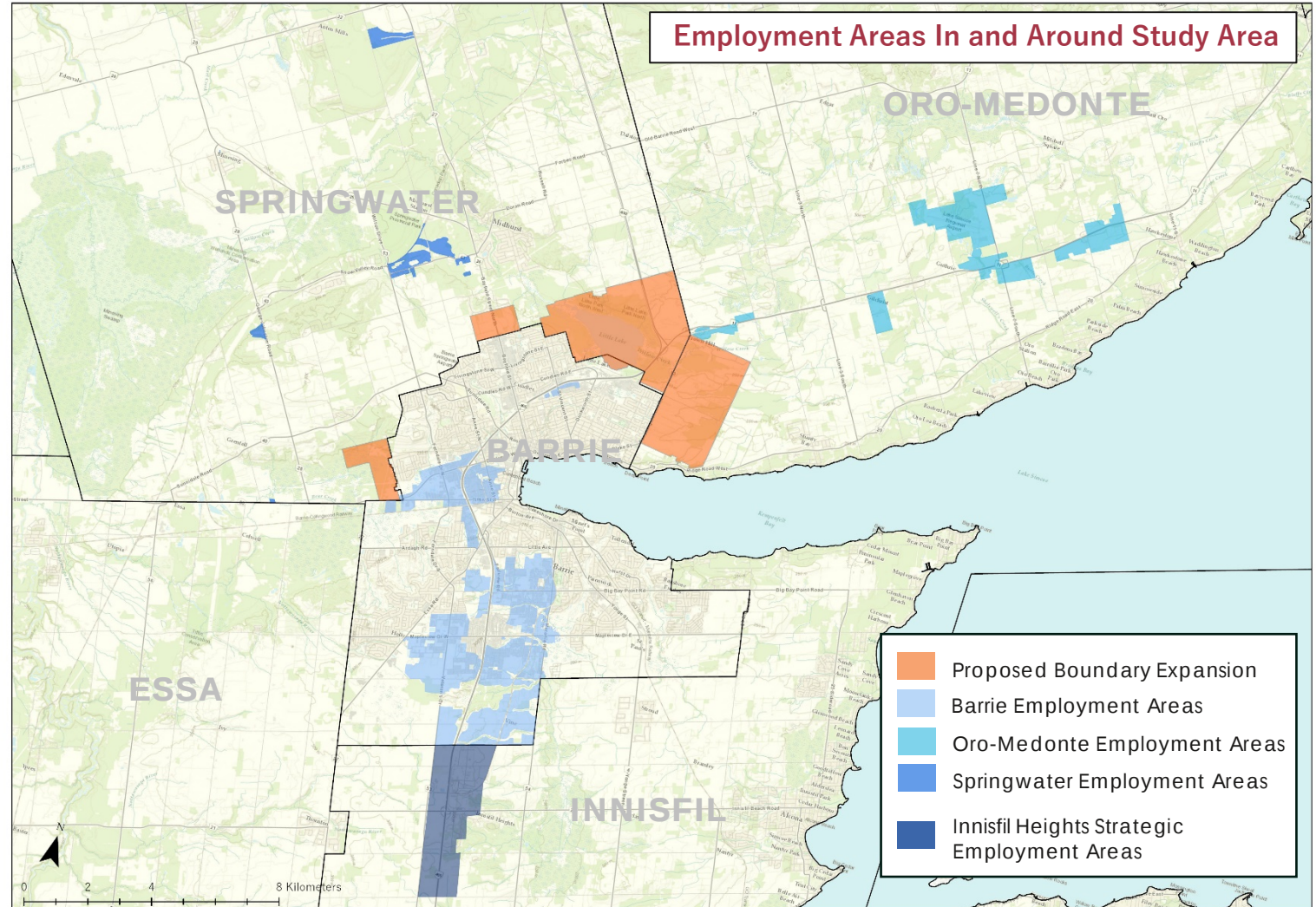


# Employment Area Land Needs Assessment



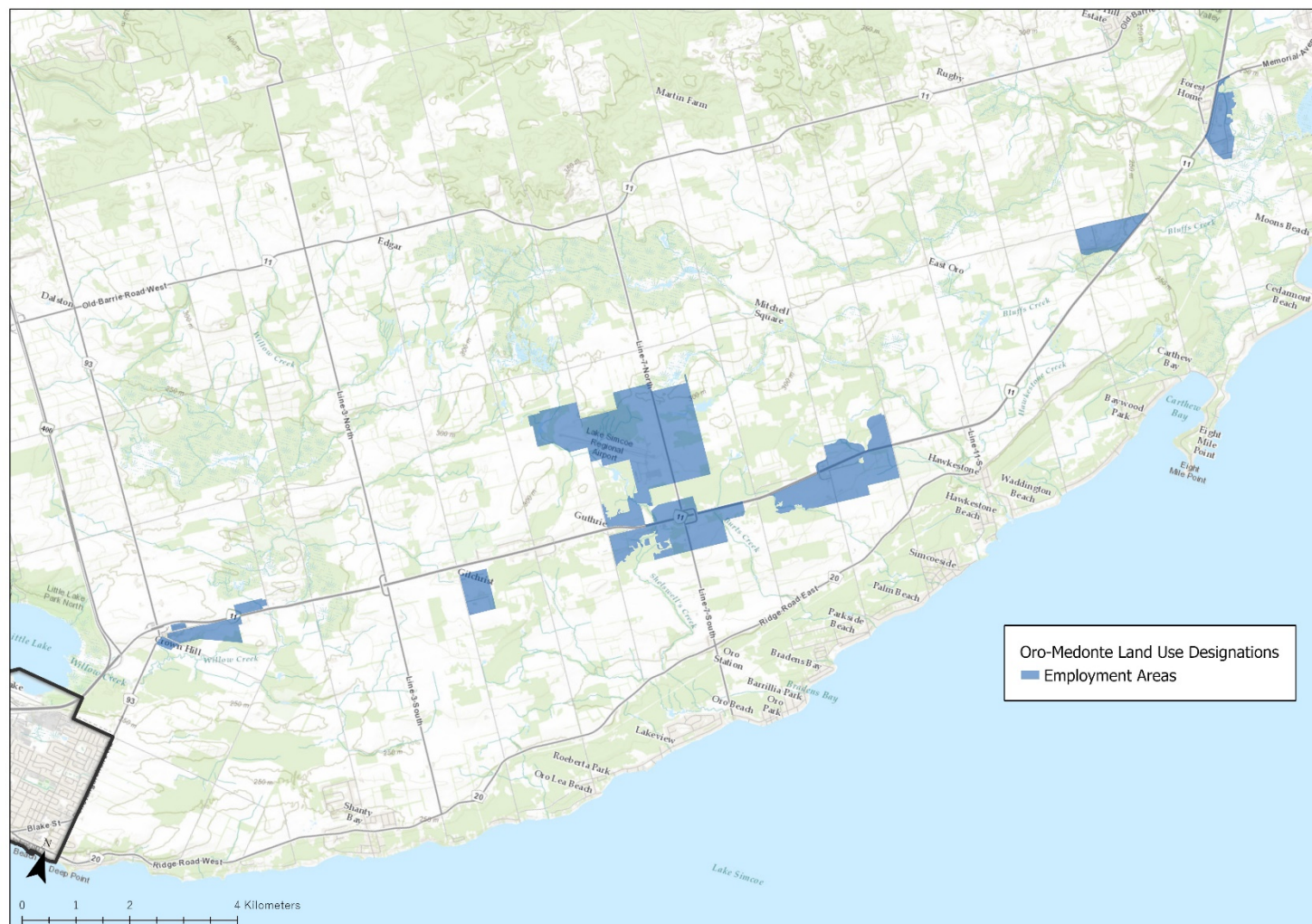
# Barrie's Employment Area Land Needs

- Long-term Employment Area supply appears to be sufficient to meet forecast need
- However, short supply of
  - Shovel-ready lands
  - Parcels for expansion of existing users and new large users



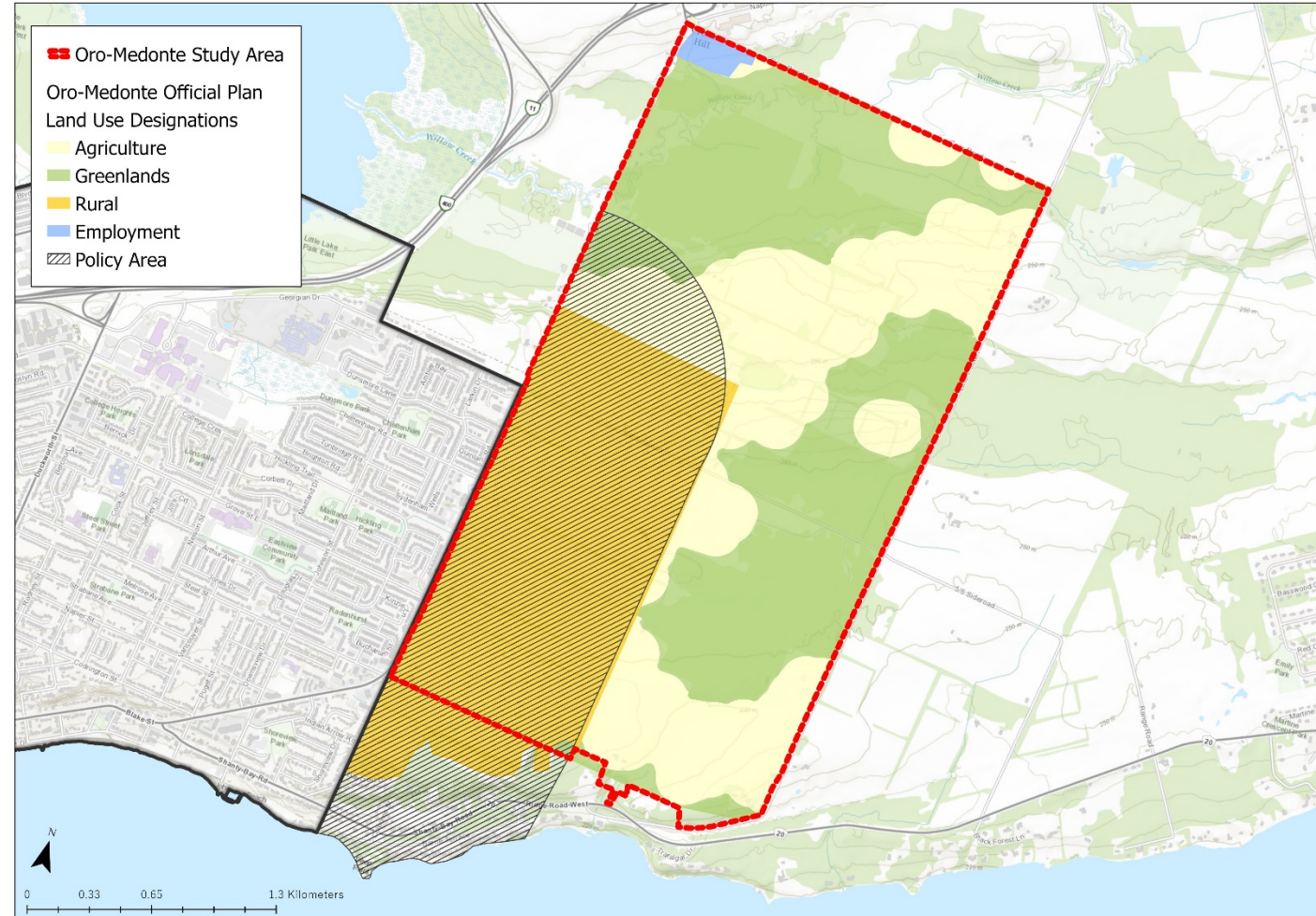
# Oro-Medonte's Employment Area Land Needs

- Township has well-located Employment Areas
- County OP premised on current Employment Areas being built out at rural densities
- No shift to “urban” employment land structure
- In line with Oro-Medonte Employment Land Strategy (2020)

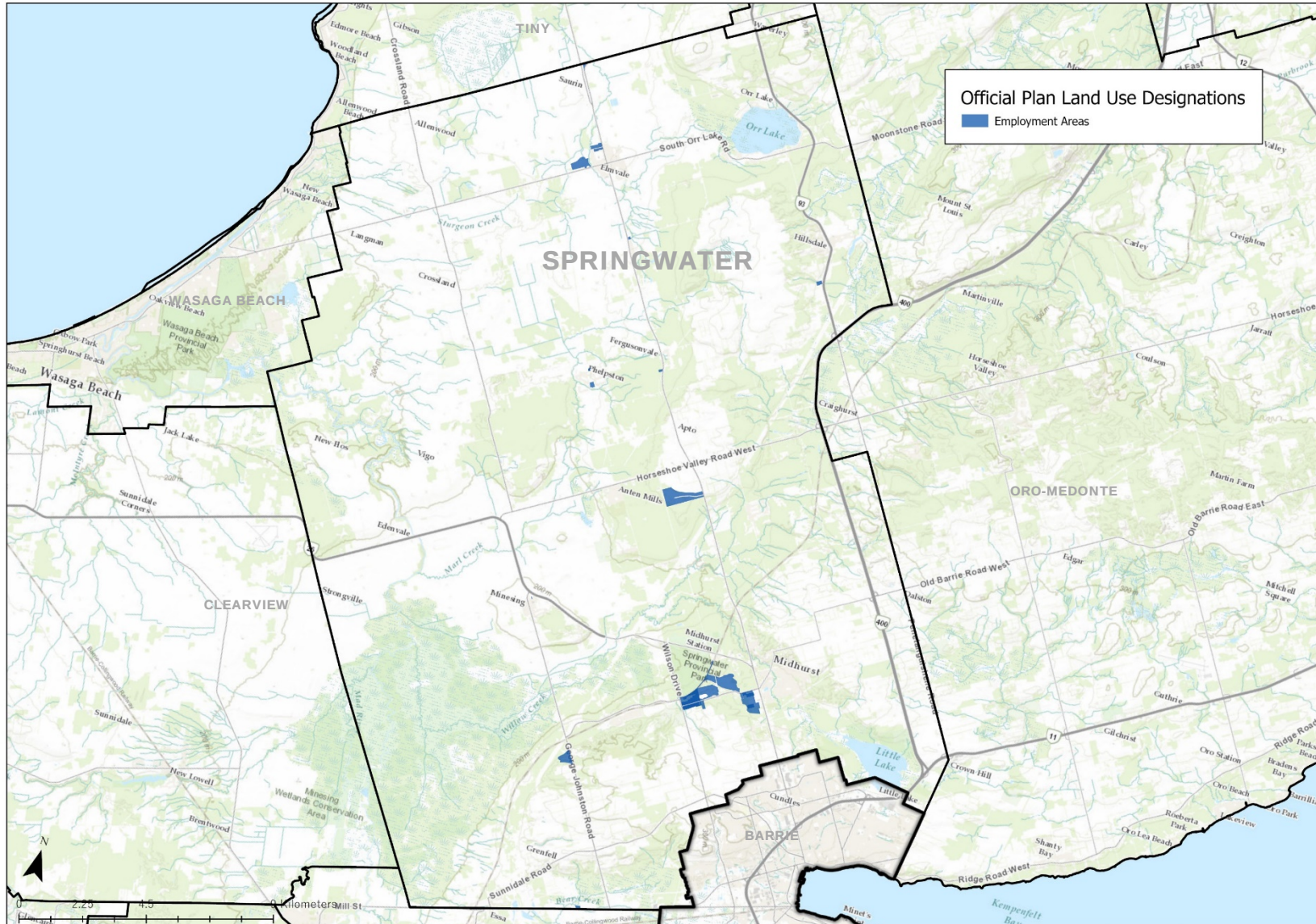


# Barrie's Proposal to Oro-Medonte

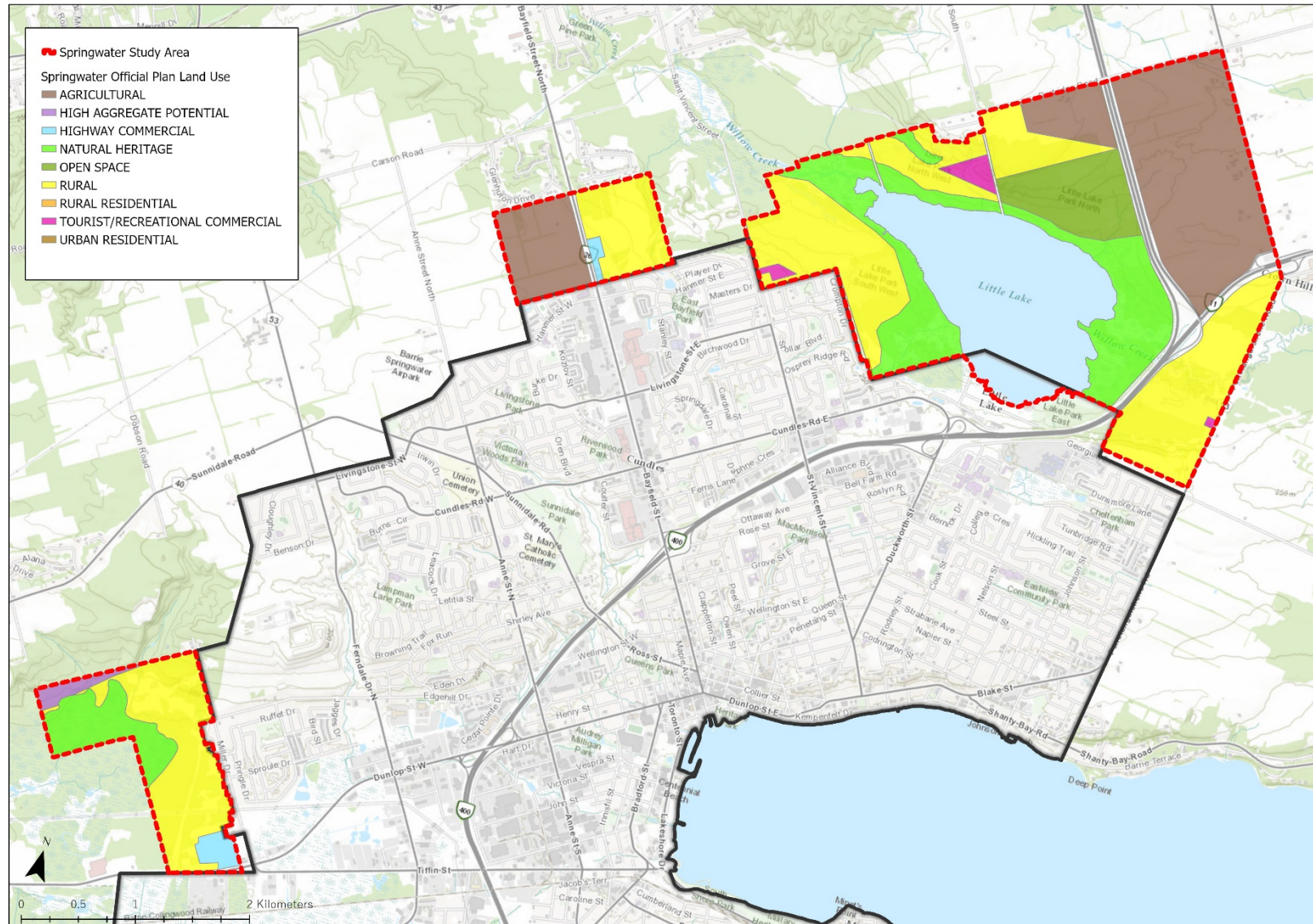
- Barrie's states need is for Employment Areas
- Oro-Medonte staff have indicated need for urban residential uses for higher density housing
- Proposed lands:
  - do not directly address Barrie's lack of "shovel-ready" employment area
  - appear to have constraints, including lack of large employment land parcel opportunities
  - would, if part of Oro-Medonte, represent major new urban settlement area in Township



# Springwater's Employment Area Land Needs



# Barrie's Proposal to Springwater



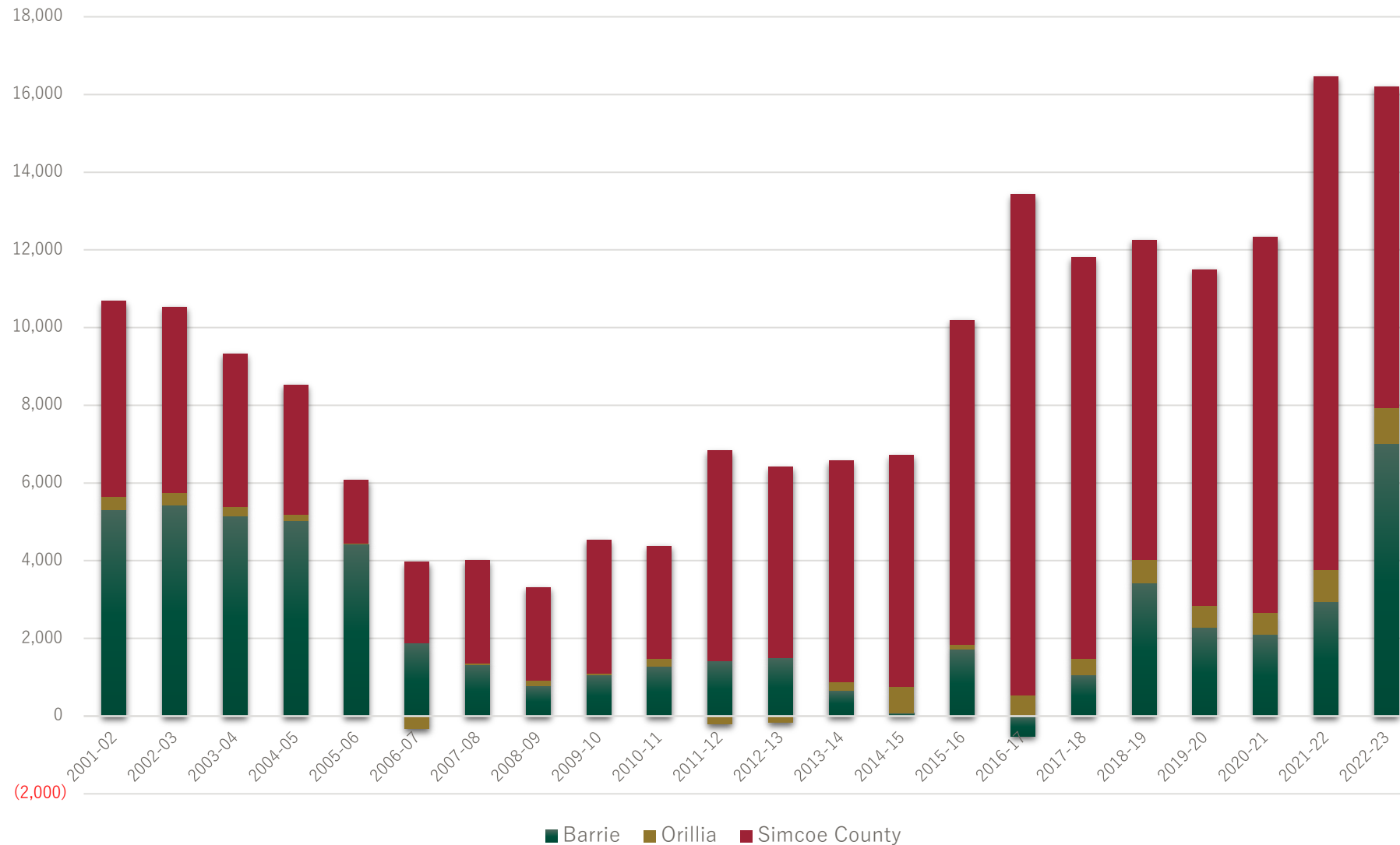
# Employment Area Land Needs Assessment Summary

- Strong demand for Employment Areas along Highway 400 to 2051
  - Key corridor for north-south goods movement
  - Demand spans local, regional, national, and international levels
- Proactive planning by local municipalities and County—significant infrastructure investments underway to support Employment Areas
- Barrie's Employment Area supply is sufficient, in theory, to meet long-term demand, though short-term supply challenges persist, particularly for larger parcels
- Limited case for annexing in Oro-Medonte or Springwater for employment-only use as a short-term solution

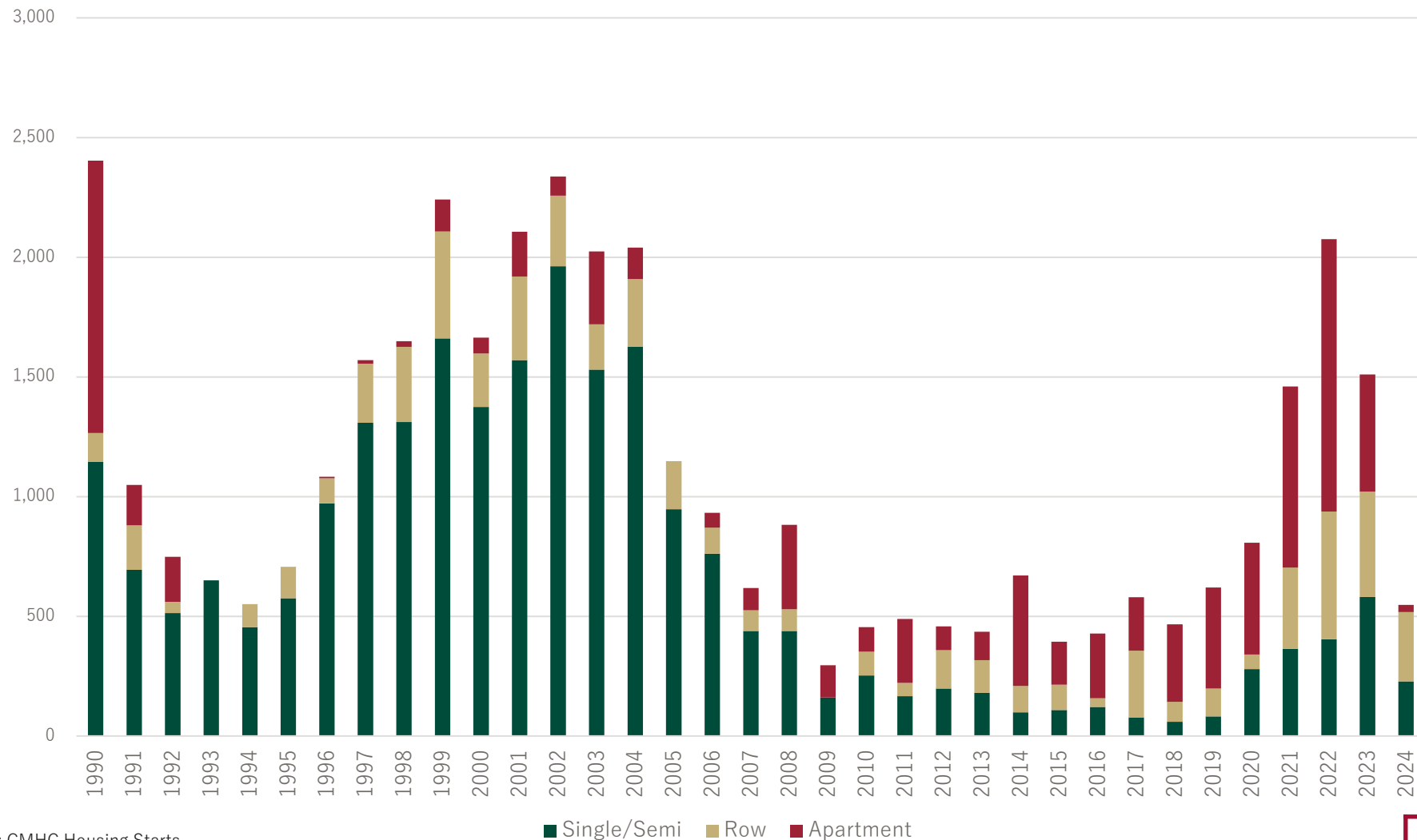
# Community Area Land Needs Assessment



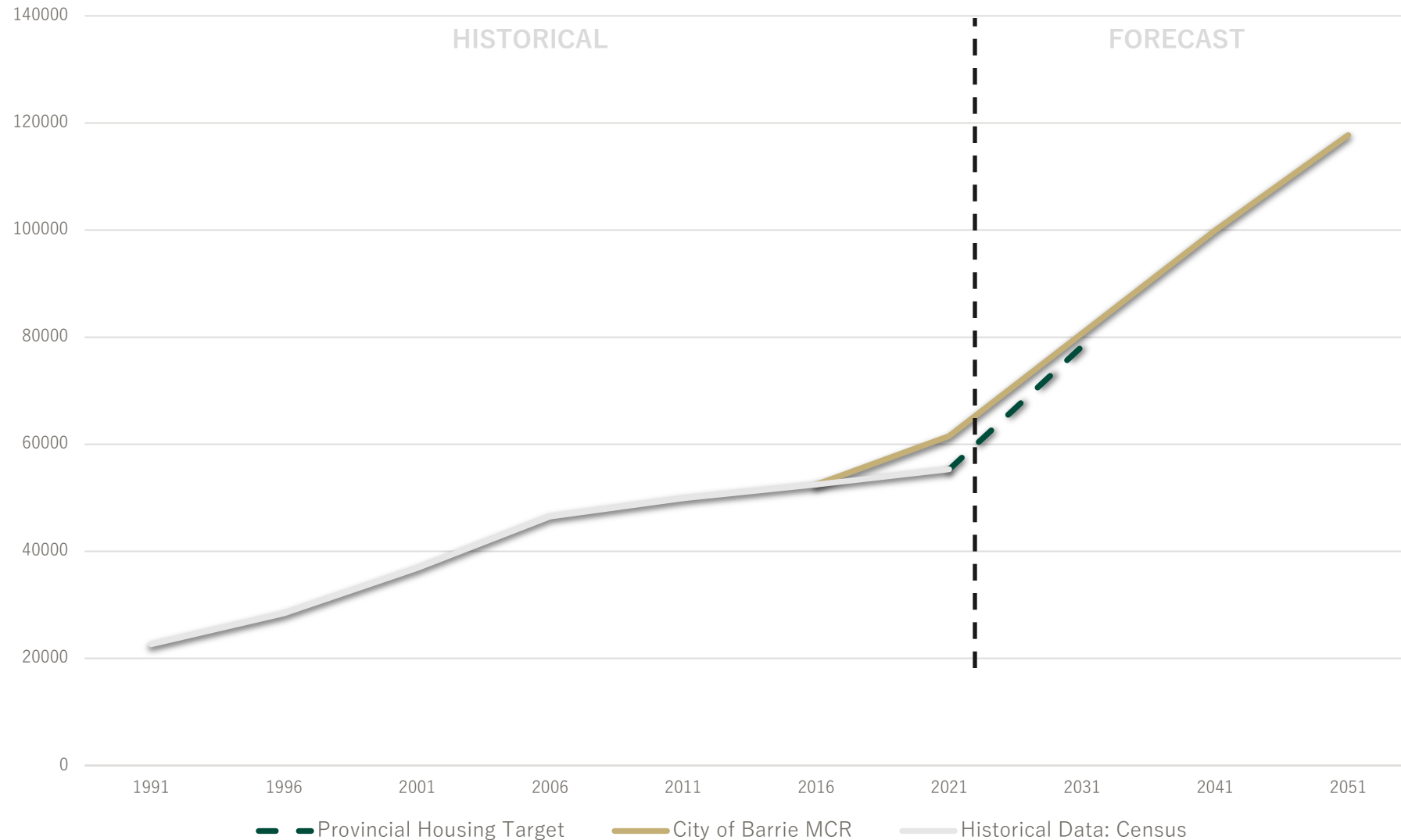
# Population Growth in Simcoe Census Division



# Barrie's Housing Growth Potential is High But, Like Elsewhere in GGH, Current Growth is Slow

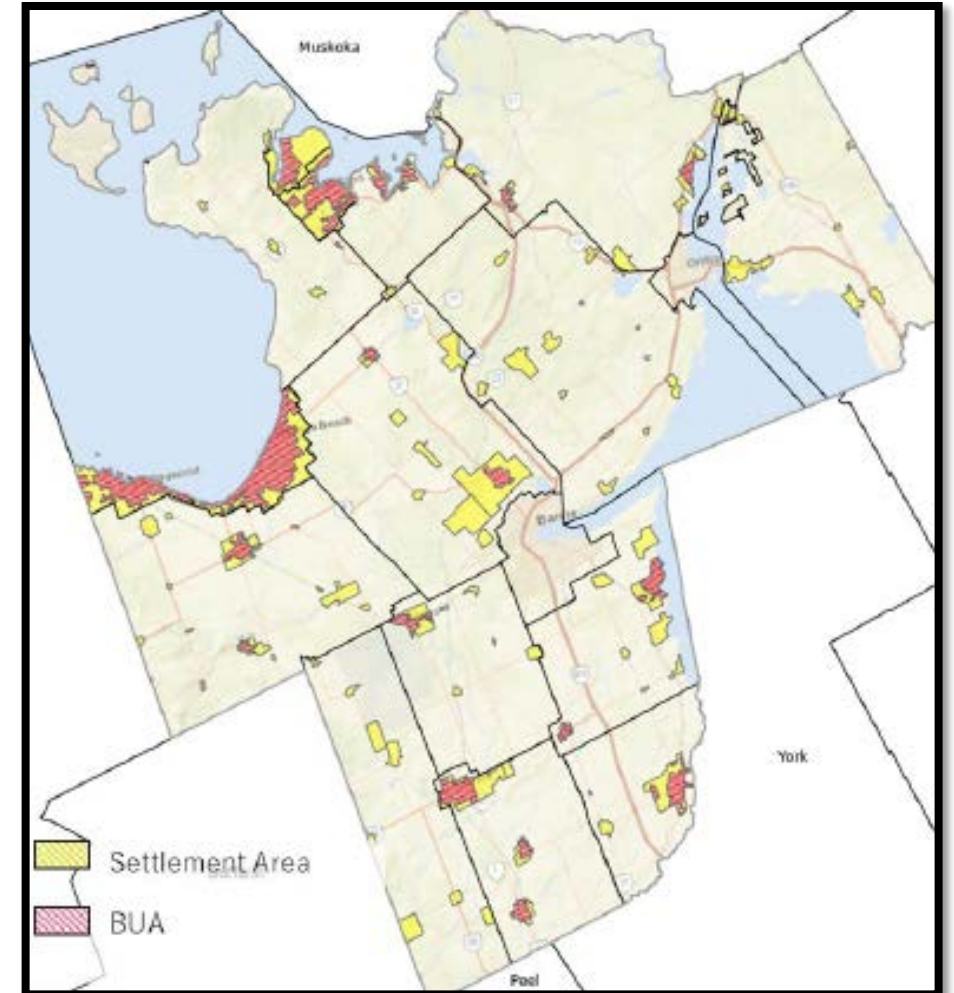


# Much More Housing Also Required to Achieve Barrie's 2051 MCR Housing Forecasts



# Key Questions – Barrie Community Area Land Needs

- How much intensification can be expected in Barrie?
  - OP commits to 50% of all new homes in Built Up Area (BUA) annually to 2051
- What density can Designated Greenfield Area (DGA) in Barrie reasonably be developed at?
  - Measure is “people and jobs per hectare”

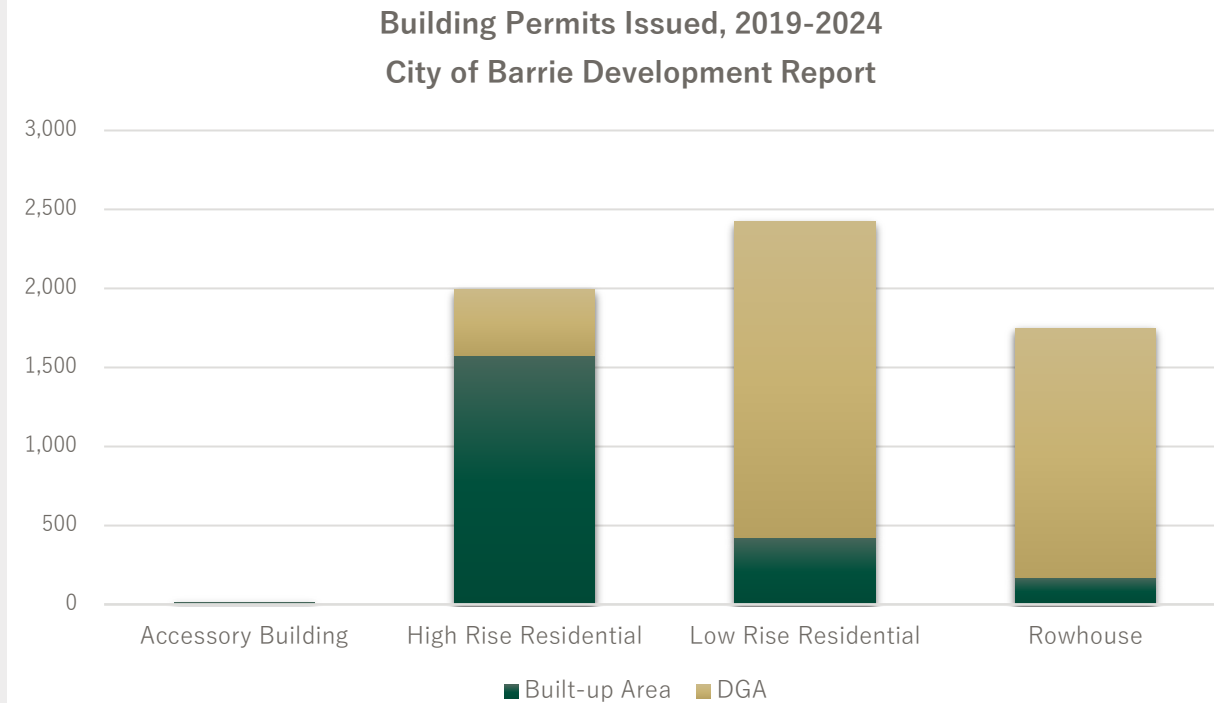


# Barrie Updated Housing Needs to 2051

|                  | MCR Forecast<br>(30 years) | Actual (30 years) | Actual<br>(Annual Average) |
|------------------|----------------------------|-------------------|----------------------------|
| 2021             | 61,500                     | 55,300            |                            |
| 2051             | 117,700                    |                   |                            |
| Growth 2021-2051 | 56,200                     | 62,400            | 2,100                      |
| <i>BUA (50%)</i> |                            | <i>31,200</i>     | <i>1,050</i>               |
| <i>DGA (50%)</i> |                            | <i>31,200</i>     | <i>1,050</i>               |

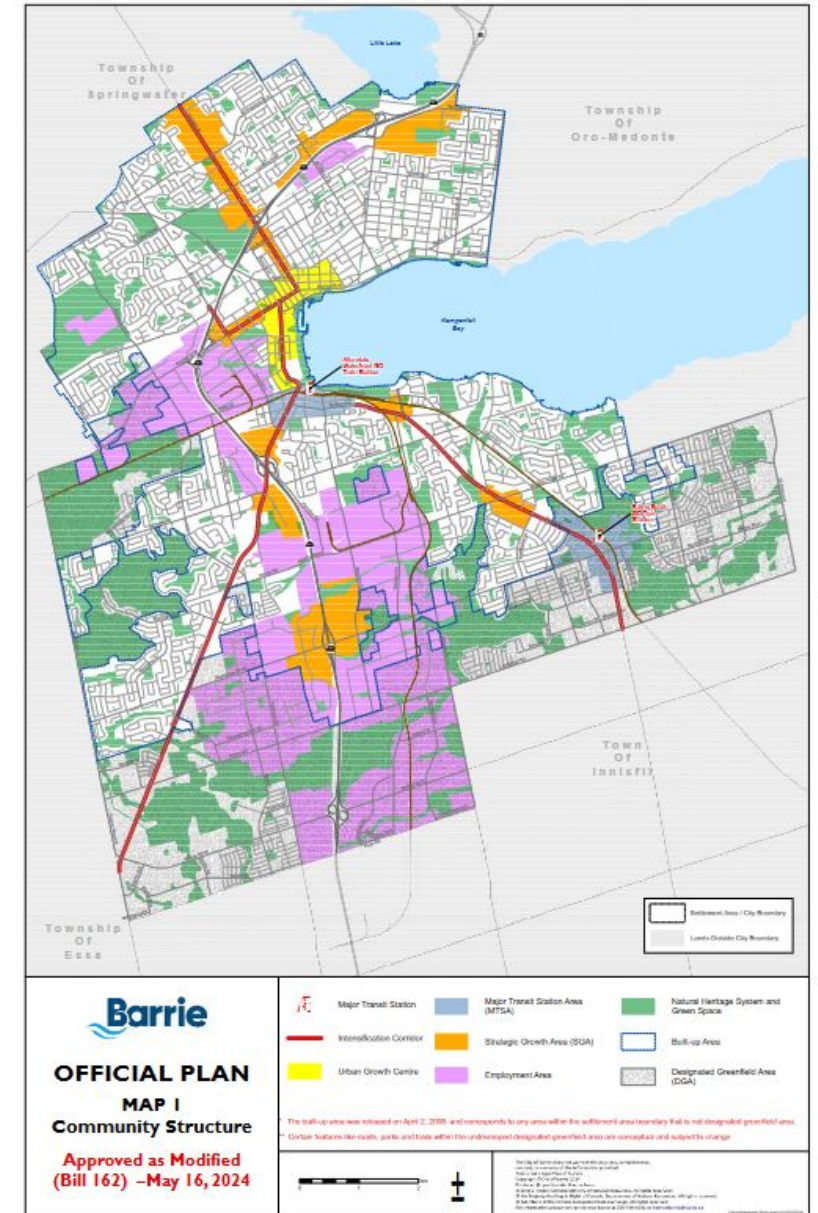
# Housing Demand in the Barrie BUA

- OP intensification target is 50% of all new units
  - 31,200 to 2051
  - 1,050 per year
- Intensification performance
  - 35% intensification overall between 2019 and Aug 2024
  - Mostly high-rise apartments

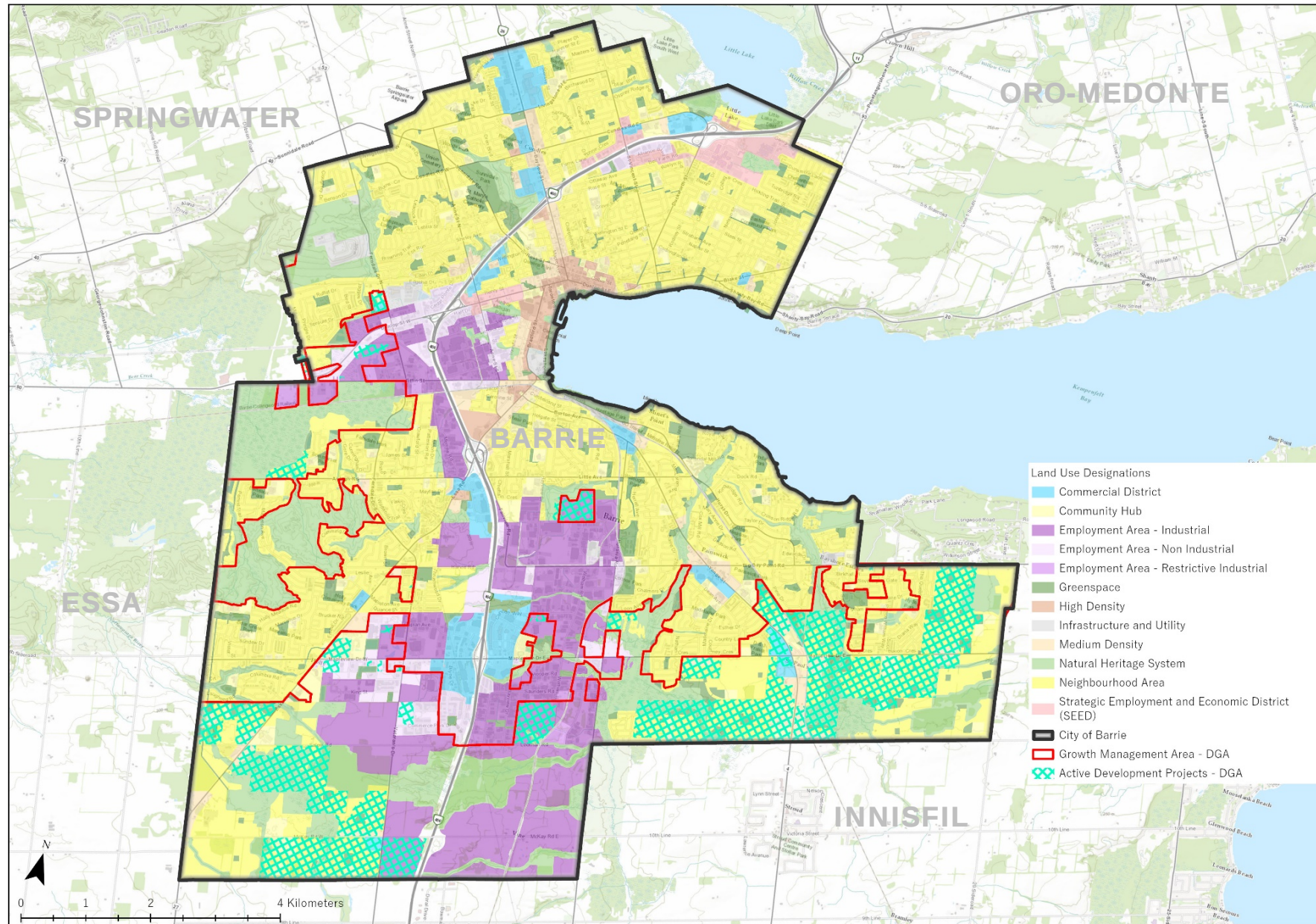


# Housing Supply in BUA is Theoretically Sufficient

- 38,400 unit supply identified through MCR
- Focused in Strategic Growth Areas
  - Urban Growth Centre
  - Intensification nodes and corridors
  - Major transit station area
  - Other areas within the built boundary
  - Growth through second units



# Barrie's Designated Greenfield Areas



# Barrie's Designated Greenfield Areas

- 31,200 units needed in the DGA
- Lands covered by applications
  - Building permits = 4,000 units (11% apartments)
  - Units in applications (not built) = 13,000 (45% apartments)
  - Total = 17,000 units
- Vacant lands (no applications yet):
  - Estimated 351 developable ha
  - Need to accommodate 14,200 units on this vacant land

# Designated Greenfield Area Estimated Land Need

|                                              | Scenario 1<br>Barrie Planned Density | Scenario 2<br>Typical Suburban Density |
|----------------------------------------------|--------------------------------------|----------------------------------------|
| DGA housing units 2021 - 2051                | 31,200 units                         | 31,200 units                           |
| Units permitted and in planning applications | 17,000 units                         | 13,600 units                           |
| Remaining units to be accommodated           | 14,200 units                         | 17,600 units                           |
|                                              |                                      |                                        |
| Vacant DGA lands (no applications yet)       | 351 ha                               | 351 ha                                 |
| Assumed density                              | 23 units per developable ha          | 18 units per developable ha            |
| Potential unit yield                         | 8,100                                | 6,300                                  |
|                                              |                                      |                                        |
| Unaccommodated housing units                 | 6,100                                | 11,300                                 |
| Assumed density                              | 23 units per developable ha          | 18 units per developable ha            |
| <b>Estimated land need</b>                   | <b>265 ha</b>                        | <b>630 ha</b>                          |

# Barrie's Community Area Land Needs

- Like other GGH municipalities, Barrie is planning for more compact development and more intensification
- Recent and planned growth suggest that achieving OP targets will be challenging
  - **Intensification** – Current rate is 35%, whereas OP target is 50% and with much higher growth
    - Intensification target rate maintained in both Scenarios
  - **Greenfield Density** – needs to be much higher than elsewhere in GGH and very different from current housing being constructed

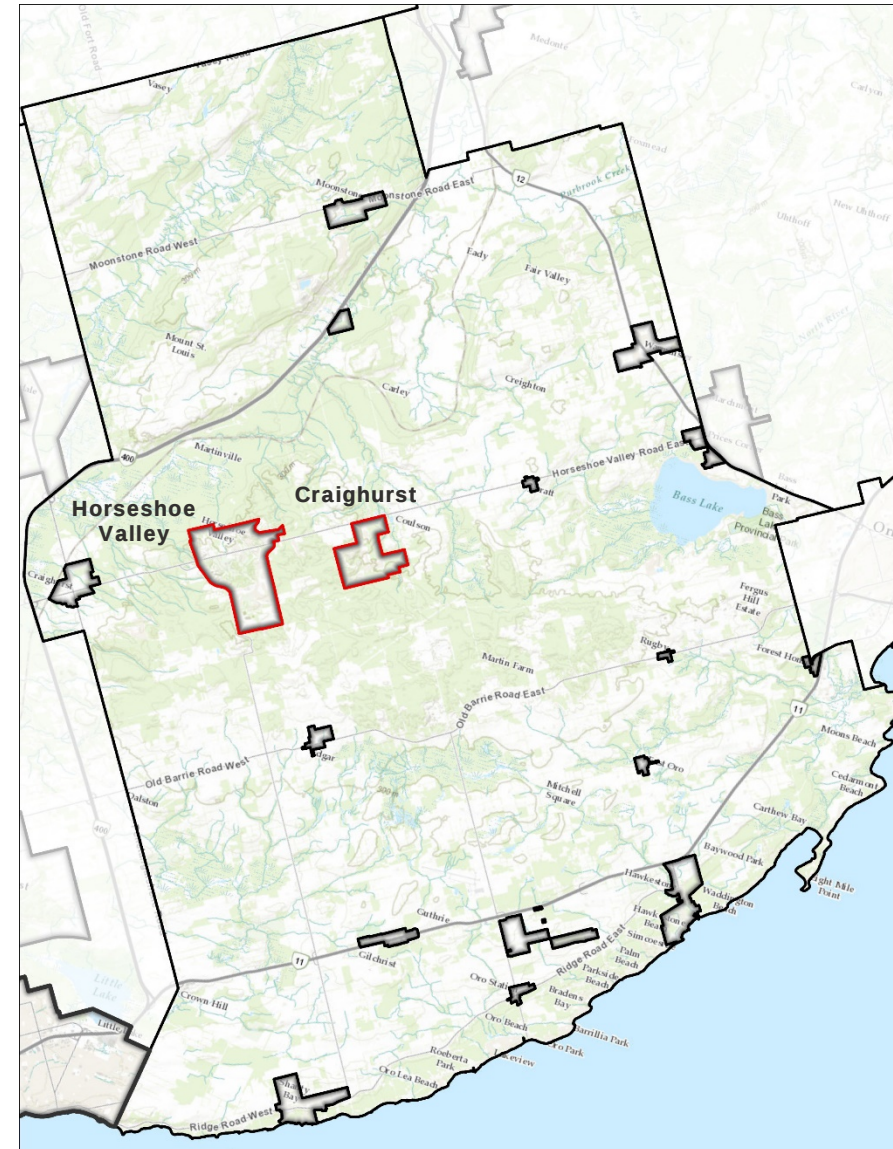
# Barrie Density Target for Entire DGA is 79 p+j/ha Would Need Approximately 100 p+j/ha in Vacant Lands

| Municipality                    | Residents and Jobs Per Ha |
|---------------------------------|---------------------------|
| <b>York Region</b>              |                           |
| Aurora                          | 55                        |
| East Gwillimbury                | 60                        |
| Markham                         | 70                        |
| Richmond Hill                   | 70                        |
| Vaughan                         | 70                        |
| Whitchurch-Stouffville          | 55                        |
| York Region New Community Areas | 65                        |
| <b>Peel Region</b>              | 70                        |
| Brampton                        | 71                        |
| Caledon                         | 67.5                      |
| <b>Durham Region</b>            | 53                        |

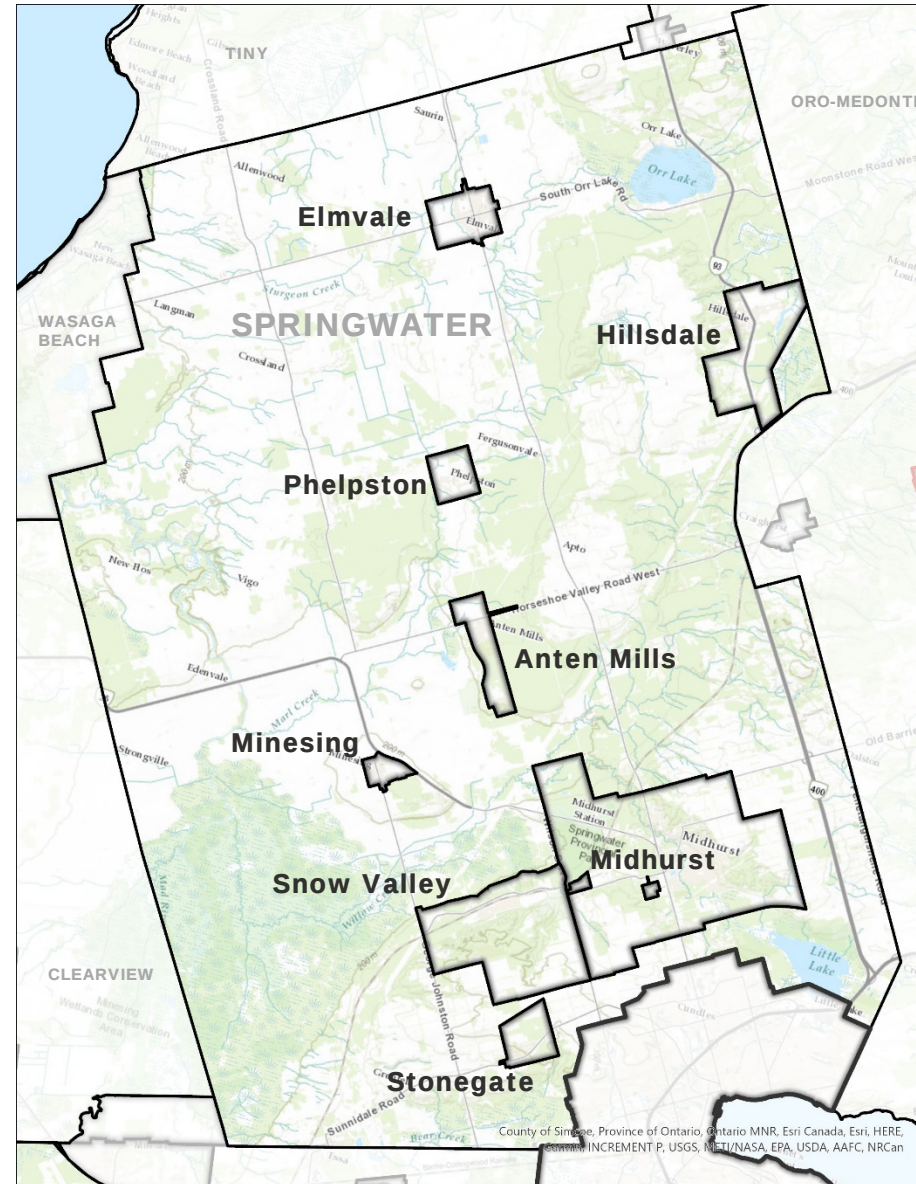
| Municipality              | Residents and Jobs Per Ha |
|---------------------------|---------------------------|
| <b>Halton Region</b>      | 62                        |
| Burlington                | 76                        |
| Oakville                  | 70                        |
| Milton                    | 59                        |
| Halton Hills              | 53                        |
| <b>Simcoe County</b>      |                           |
| Springwater               | 45                        |
| Essa                      | 45                        |
| Innisfil                  | 55                        |
| New Tecumseth             | 55                        |
| Bradford West Gwillimbury | 55                        |
| <b>Orillia</b>            | 50                        |

# Oro-Medonte Community Area Land Needs

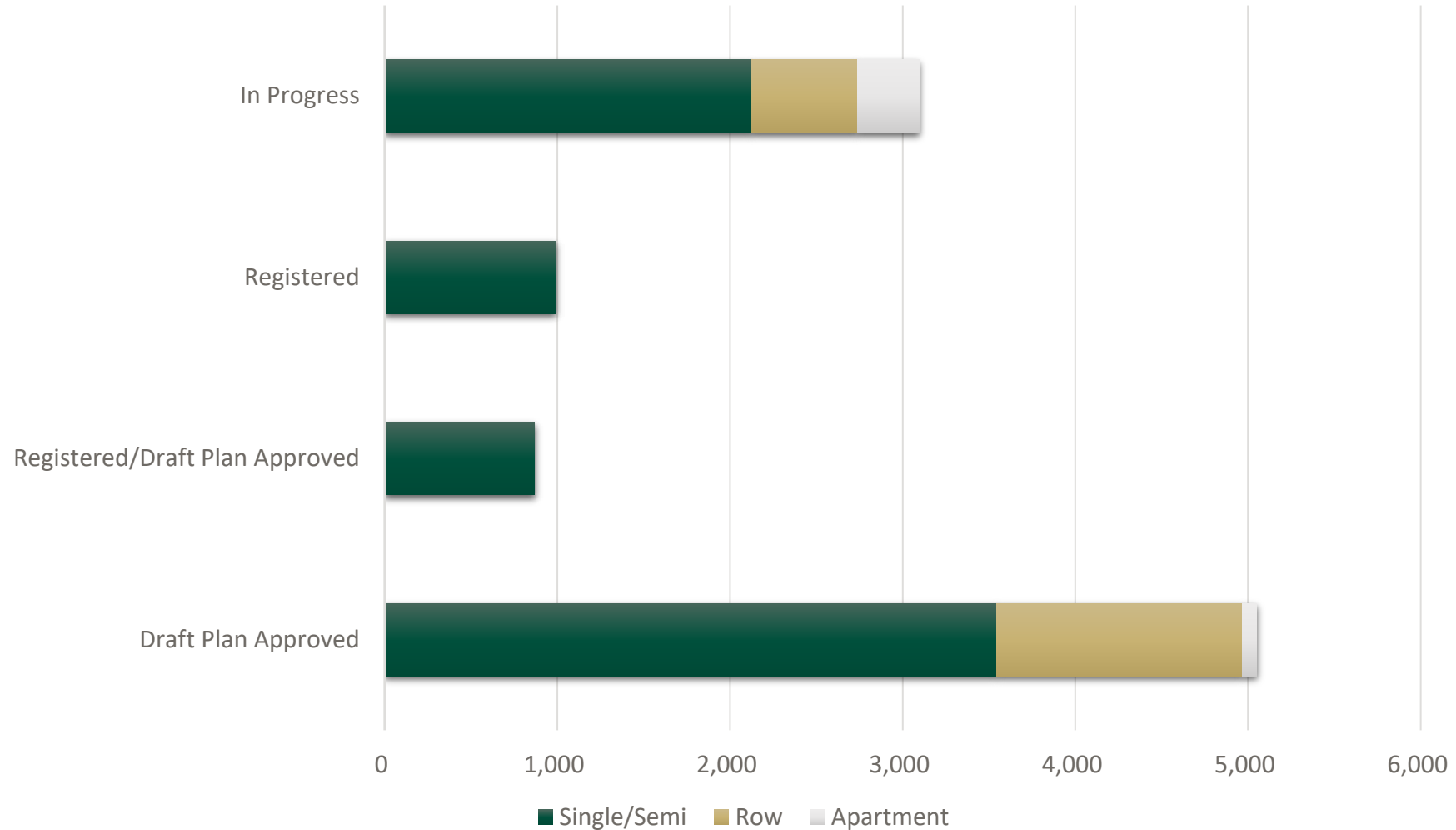
- Majority of growth focused in settlement areas (Craighurst and Horseshoe Valley)
  - Current housing stock is 97% singles and semis
  - County forecast is for 92% singles and semis and 8% other
- Limited growth in rural areas (infilling rural lots of record)
- No shift to more “urban” settlement area structure contemplated



# Springwater Community Area Land Needs



# Springwater Development Pipeline



# Summary of Findings

- Case for additional lands for Barrie is:
  - **Relatively weak** – for only Employment Areas
  - **Relatively strong** – for Community Areas and for comprehensive Community/Employment Area uses
- If undertaking annexation, should consider including Employment as well Community Area lands
  - Allows for a longer-term view for development of complete communities

|                                       | Community Area Need | Employment Area Need | Total  |
|---------------------------------------|---------------------|----------------------|--------|
| Scenario 1 – Barrie Planned Density   | 265 ha              | 125 ha               | 390 ha |
| Scenario 2 – Typical Suburban Density | 630 ha              | 300 ha               | 930 ha |

25 NB: Employment Area based on approximate ratio of Community to Employment Areas in Salem & Hewitt's Secondary Plans

# Two Broad Options for Addressing Land Needs

## ▪ **Option 1 – Maintain Municipal Boundaries**

- Barrie's residential growth becomes denser and slows by mid-2030s
- Growth in Study Area absorbed by surrounding municipalities
- Over time, would likely require
  - servicing agreements
  - some type of regional governance model

## ▪ **Option 2 – Adjust Municipal Boundaries**

- Growth would continue to occur in the Study Area
- Would involve annexation of lands to Barrie to accommodate land needs
- Would require comprehensive analysis of potential annexation configurations, and assessment of servicing requirements and fiscal impacts

# Next Steps

- Discuss possible Stage 3 work
- Requires expertise in
  - Forecasting and demographics
  - Civil engineering
  - Municipal finance
  - Natural heritage