

Final Report

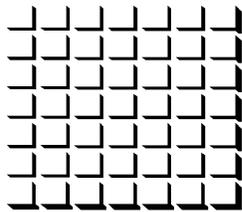
Town of New Tecumseth

Growth Management Study

Prepared by

The Jones Consulting Group Ltd.

C. N. Watson and Associates Ltd.



The **JONES**

**CONSULTING
GROUP LTD.**

PLANNERS, ENGINEERS
& SURVEYORS



C.N. WATSON
AND ASSOCIATES LTD.
ECONOMISTS

Planning for Growth

March 13, 2002

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- D KEY BACKGROUND DATA FOR TOWN OF NEW TECUMSETH
EMPLOYMENT FORECAST

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

1. The purpose of this report is to update residential and non-residential growth forecasts for the Town of New Tecumseth and determine land requirements to accommodate such growth, as input to an Official Plan review process.
2. The terms of reference required **population projections** for a 30-year period, and **housing unit projections** for a 20 year period, each in five year increments and by community. The **employment projections** were undertaken Town-wide, over a 20-year period in five year increments and by sector. (*Chapter 1*)
3. The population/housing unit projection approach combined a housing market approach with a verification process using long range forecasts prepared by the Ministry of Finance, the Ministry of Transportation and others, which used variations of the cohort survival methodology. The employment projection was developed based on the activity rate methodology. (*Chapter 2*)
4. The Town's current demographic profile includes: three urban communities (Alliston, Beeton and Tottenham) containing 69% of the population, and a rural area containing a private serviced retirement community, with 31% of the population; average household size of 2.86 persons per unit (a substantial decline since 1981(from 3.24 ppu)); and rapid growth in the 20-44 year and 65+ year age groups. (*Chapter 3*)
5. The policy context in which the updated New Tecumseth forecast was prepared, included the current Official Plan and Secondary Plan policies, the County Official Plan and the Provincial context (eg. Provincial Policy Statement, Smart Growth initiative, Oak Ridges Moraine legislation, and discussions regarding the possible extension of Highway 427). (*Chapter 4*)
6. Some of the key assumptions used in developing the population/housing unit forecast included: available municipal water and sanitary sewer capacity in Alliston, Beeton and Tottenham as required (and no additional municipally serviced communities); no expansion of the Briar Hill development beyond OPA 23 (and no additional privately

serviced communities); no significant servicing constraints in other South Simcoe communities (particularly Barrie); and transportation improvements (eg. additional expressway capacity) available in South Simcoe, as needed. (*Chapter 5*)

7. Key inputs to the residential projection, using the housing market approach included: units in the development process, historical building permits issued, interviews with developers, staff and other stakeholders, and general market considerations. (*Chapter 5*)
8. The results of the population/housing unit forecast for the Town of New Tecumseth (in five year increments) is set out in **Table S-1**. (*Chapter 5*)

**TABLE S-1
TOWN OF NEW TECUMSETH
POPULATION/HOUSING UNIT GROWTH FORECAST**

	Population	Housing Units
1996	22,902	7,920
2001	25,800	9,000
2006	29,600	10,500
2011	33,900	12,100
2016	38,500	13,700
2021	42,900	15,200
2026	46,800	16,900
2031	51,100	18,400

Figures are rounded

Source: See Table 5-3 (figures are rounded)

9. The population/housing unit forecast by community was a product of the housing market model approach used in developing the overall Town-wide forecast. The results are set out in **Table S-2. (Chapter 6)**

TABLE S-2
TOWN OF NEW TECUMSETH
FORECASTED POPULATION BY COMMUNITY, 2001 -2031

Community	YEAR						
	2001	2006	2011	2016	2021	2026	2031
Alliston	9,700	11,400	13,300	15,400	17,400	19,200	21,100
Beeton	3,400	3,900	4,400	5,000	5,600	6,000	6,600
Tottenham	5,000	5,900	7,000	8,100	9,200	10,200	11,300
Briar Hill Development	1,900	2,300	2,800	3,300	3,700	4,200	4,600
Rest of Tecumseth	5,800	6,100	6,400	6,700	7,000	7,200	7,500
Total	25,800	29,600	33,900	38,500	42,900	46,800	51,100

TOWN OF NEW TECUMSETH
FORECASTED HOUSING UNITS BY COMMUNITY, 2001 - 2031

Community	YEAR						
	2001	2006	2011	2016	2021	2026	2031
Alliston	3,300	3,900	4,600	5,200	5,900	6,600	7,300
Beeton	1,100	1,300	1,500	1,700	1,800	2,000	2,200
Tottenham	1,600	2,000	2,300	2,700	3,100	3,500	3,900
Briar Hill Development	900	1,100	1,400	1,700	1,900	2,200	2,400
Rest of Tecumseth	2,100	2,200	2,300	2,400	2,500	2,600	2,600
Total	9,000	10,500	12,100	13,700	15,200	16,900	18,400

Figures are rounded

Source: Developed by C.N. Watson and Associates Ltd.

10. The employment forecast was based on the population forecast, with the ratios of jobs to population (activity rate) by sector developed on the basis of 1996 Census data, updated by more recent information from the Economic Development Corporation. The results are set out in **Table S-3**. (Chapter 7)

**TABLE S-3
TOWN OF NEW TECUMSETH
EMPLOYMENT FORECAST 2001-2021**

Year	Primary	Work at Home	Industrial	Population Related	Institutional	Total
2001	260	1,060	6,290	4,080	1,470	13,150
2006	260	1,300	7,980	5,090	1,620	16,250
2011	260	1,600	8,920	5,710	1,790	18,270
2016	260	1,930	9,770	6,340	1,950	20,240
2021	260	2,280	10,780	6,930	2,100	22,350

Figures are rounded

11. Forecasted residential units by community was compared to units in the Town's development approvals process. Potential supply from vacant residentially designated lands was also considered. The results are presented in **Table S-4**. On a Town-wide basis, projected population and housing unit growth is expected to be accommodated by housing units already in the development approvals process together with potential unit yield from vacant residentially designated lands. On a community basis, there appears to be a need to designate additional lands for residential development in Beeton. (Chapter 8)

TABLE S-4								
Housing Unit Projections to 2021								
versus								
Units in the Development Approvals Process (Proposed) and Potential Units								
Town of New Tecumseth								
	Low Density (1)		Medium Density (2)		High Density (3)		Totals	
	No. of Units	Percent	No. of Units	Percent	No. of Units	Percent	Totals	Percent
Projected to 2021	4,652	75%	687	11%	884	14%	6,223	100%
Currently Proposed	4,533	63%	1,152	16%	1,540	21%	7,225	100%
Vacant Land Potential	216	63%	128	37%	-	0%	344	100%
Proposed + Vacant	4,749	63%	1,280	17%	1,540	20%	7,569	100%

Notes:

- (1) Low density residential units include detached and semi-detached residential dwelling units.
- (2) Medium density residential units include townhouse units.
- (3) High density residential units include apartment units.

12. The land requirements to accommodate projected non-residential (employment) growth was calculated. This was compared to the existing supply of vacant designated land in order to determine the amount of additional lands that should be designated in the updated Official Plan to ensure that New Tecumseth can accommodate employment growth that is projected for the 2001-2021 period. The results are set out in **Table S-5**. (Chapter 8)

Table S-5				
Summary of Employment Land Needs, Existing Supply, and Additional Land Needs				
Town of New Tecumseth, 2001-2021				
	Industrial	Commercial	Institutional	Totals
	(Hectares)			
I. Projected Employment Land Needs	195	34	21	250
II. Existing Supply of Vacant Lands	80	5	0	85
III. Additional Land Needs (1)	115	29	21	165

(1) Excluding place of worship lands.

13. Land needs for new places of worship that may be required over the 2001-2021 period were calculated on the basis of current trends in place of worship planning and typical participation rate assumptions. The results are set out in Table S-6.

Table S-6				
Summary of Projected Land Need for Place of Worship Sites				
Town of New Tecumseth, 2001-2021				
	Projected Population Growth 2001-2021	No. of new Places of Worship Sites	Land Needs (acres)	Land Needs (hectares)
New Tecumseth Total	17,100	3 to 4	9 to 12	3.6 to 4.8



1. INTRODUCTION

1. INTRODUCTION

1.1 Background

The Town of New Tecumseth is conducting a review of its Official Plan, and as such requires updated growth forecasts and other background studies. The Town has retained The Jones Consulting Group Ltd., in association with C.N. Watson and Associates Ltd. and Brook McIlroy Inc. to complete a Growth Management Study.

The key objectives of the Growth Management Study are as follows:

- (i) determine the amount and types of residential and employment growth the Town can reasonably expect to occur over the 2001-2021 period;
- (ii) determine the land area requirements to accommodate the residential and employment growth that is projected;
- (iii) recommend where within the Town this growth should occur; and
- (iv) establish a set of design guidelines that will help to ensure that the projected growth occurs in an efficient and aesthetically pleasing manner.

C.N. Watson and Associates Ltd. (CNWA) is responsible for the growth forecast components of the study. The Jones Consulting Group Ltd. is responsible for the determination of future land needs to accommodate projected residential and non-residential growth. Brook McIlroy Inc. is responsible for the preparation of the urban design guidelines, which are contained in an accompanying report, under separate cover.

This report outlines the methodology, background research and results with respect to the production of **updated growth forecasts** and the calculations regarding the determination of **future land needs** to accommodate projected growth for the Town of New Tecumseth.

1.2 Terms of Reference

The terms of reference for the growth forecasts require the following projections:

Population

Time Horizon - 30 year forecast in five (5) year increments (with emphasis on the first 20 years)

Geography - By Urban vs. Rural
By Urban Community (Alliston, Beeton, Tottenham)
By area in the former Township of Tecumseth (Green Briar/Briar Hill/ Briar Hill West, Colgan, Penville, Rich Hill, Thompsonville, and the remainder)

Housing Units

Time Horizon – 20 year forecast

Geography – By four predecessor municipalities

Allocation – By type and tenure

Employment

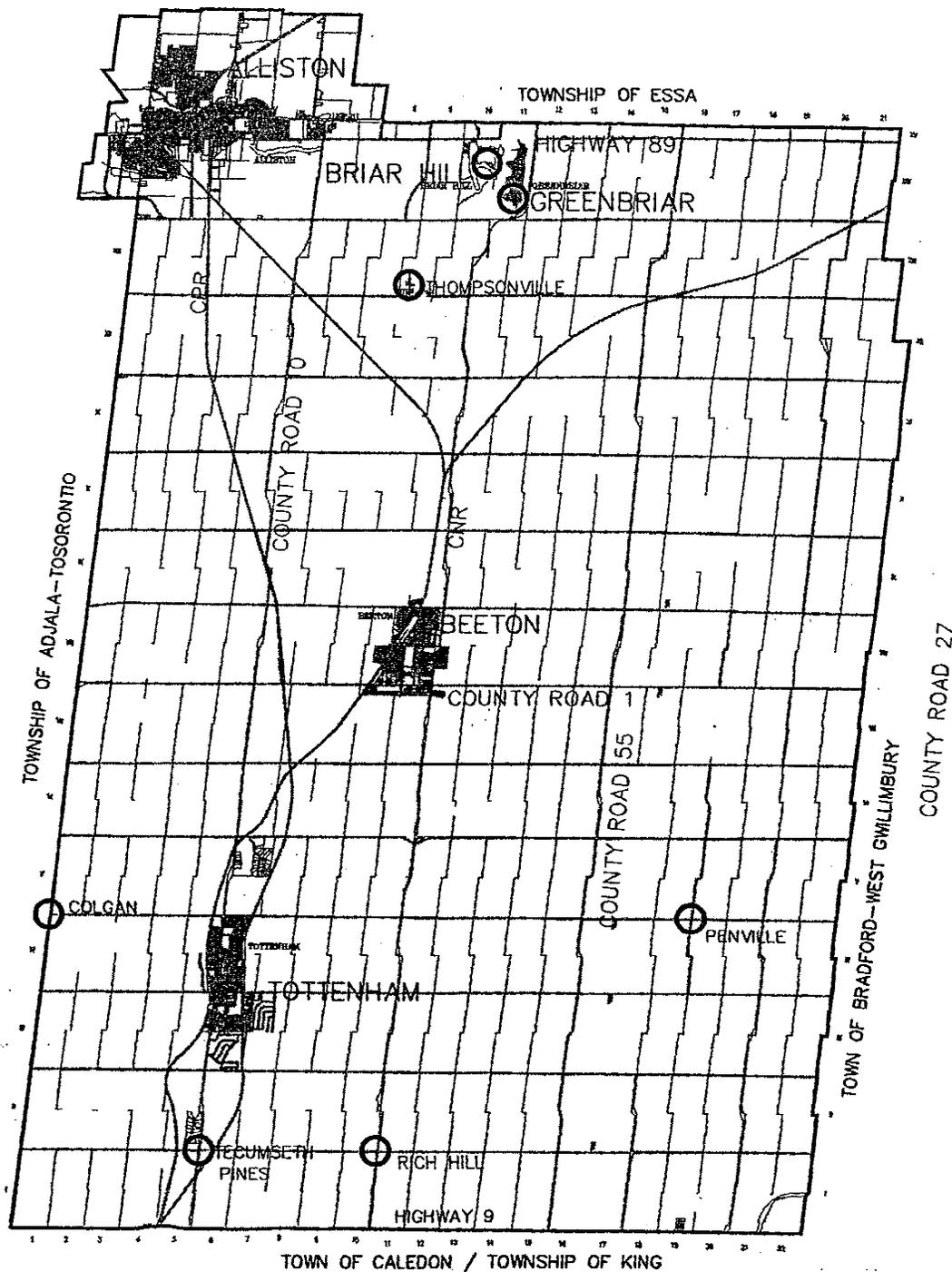
Time Horizon – 20 year forecast in five (5) year increments

Geography – Town-wide

Allocation – By sector

1.3 Town Structure

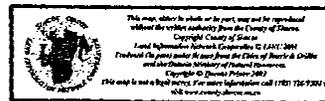
The Town of New Tecumseth is located in the southern section of the County of Simcoe. The Town is serviced by Highways 9 and 89 and several County roads (1, 10 and 55). The eastern boundary of the Town is located five kilometres west of Highway 400, with the Alliston urban area located approximately 15 km from 400, on the Town's western boundary (Map 1-1). The remaining two urban communities, Beeton and Tottenham, are located in the central and southern parts of the Town, respectively.



MAP 1-1

TOWN OF NEW TECUMSETH
COUNTY OF SIMCOE

Base mapping provided by the County of Simcoe.



The remaining area comprises the rural/agricultural area of the Town. The area contains the adult lifestyle community of Green Briar/Briar Hill/Briar Hill West (known hereafter as the Briar Hill development), as well as four existing hamlets – Colgan, Rich Hill, Thompsonville and Penville (Map 1-1). In addition, there are several estate residential communities.

The Town is comprised of four former municipalities which were amalgamated on January 1, 1991. These include the former Town of Alliston, Village of Beeton, Village of Tottenham, and Township of Tecumseth. The former Town and Villages are serviced with municipal water and sanitary sewer, which are not available in the former Township. However, the latter does contain the Briar Hill development, a privately serviced, condominium community of approximately 900 existing units, marketed to empty nesters. Map 1-1 shows the community locations within the Town.

Table 1-1 sets out the estimated total (mid-year) 2001 population and housing units for the Town of New Tecumseth. The population and housing unit estimates were developed by CNWA using building permit data from Statistics Canada and 1996 distribution of units by community and average household size information from the 1996 Census.

TABLE 1-1
TOWN OF NEW TECUMSETH
ESTIMATED 2001 POPULATION AND HOUSING UNITS¹

2001 Population	
Total Town	25,800
Alliston	9,700
Beeton	3,400
Tottenham	5,000
Briar Hill Development	1,900
Remaining Tecumseth	5,800

2001 Housing Units	
Total Town	9,000
Alliston	3,300
Beeton	1,100
Tottenham	1,600
Briar Hill	900
Remaining Tecumseth	2,100

¹ Numbers are rounded.

Source: Appendix A

1.4 Surrounding Area

New Tecumseth is part of the South Simcoe County area, located immediately north and west of Peel and York Region, in the Greater Toronto Area (GTA). The South Simcoe area is experiencing significant growth pressures as a result of this location. The current (1999) population of the South Simcoe municipalities¹ is as follows:

South Simcoe Municipalities 1999 Population and Housing Unit Estimates

	1999 Population		1999 Housing Units	
		%		%
City of Barrie	88,495	51.0	31,958	52.4
Town of Innisfil	25,983	15.0	9,295	15.3
Town of New Tecumseth	24,407	14.1	8,521	14.0
Town of Bradford West Gwillimbury	21,531	12.4	6,762	11.1
Township of Essa	13,022	7.5	4,396	7.2
Total	173,438	100.0	60,932	100.0

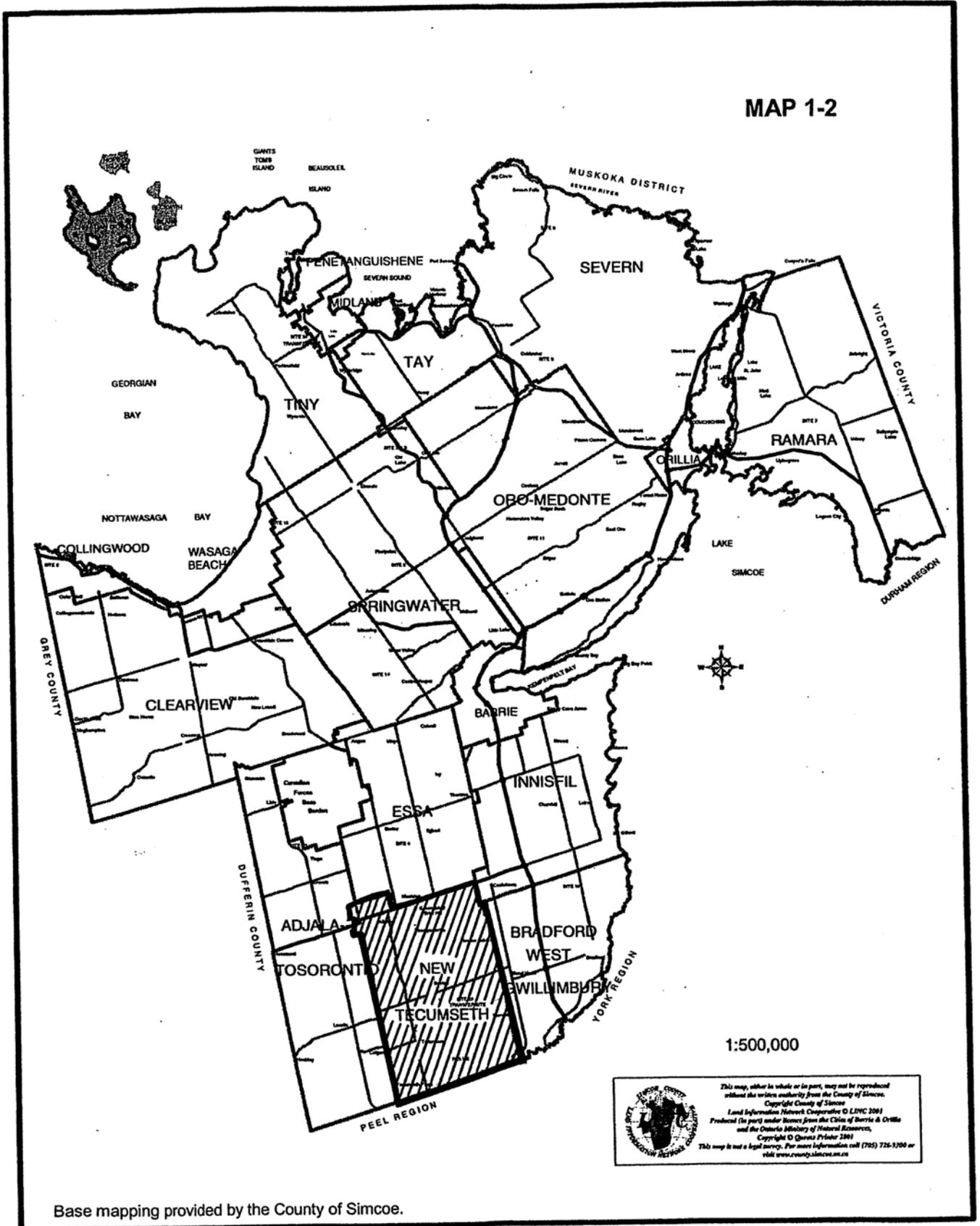
Source: Municipal Development Charge Studies, 1999

Map 1-2 shows the location of the South Simcoe municipalities in relation to the GTA.

Table 1-2 provides perspectives on growth prospects as well as the status of municipal sanitary sewer and water servicing for South Simcoe municipalities. Based on development charge forecasts which were completed in 1999, the five South Simcoe municipalities are forecast to add 22,500 units over the ten year period (2,250 units per annum). More recent (unpublished) forecasts indicate that over the longer term, these rates of growth may be exceeded.

¹ The Township of Adjala-Tosorontio is also located in the South Simcoe area but has not been included in these figures, since there are no municipal water and sewer services, and growth prospects are limited. The 1999 population and housing unit estimates were developed as part of the 1999 Development Charge process for each municipality, and are contained in their respective Development Charge Background Studies. All population and housing unit estimates were prepared by CNWA, with the exception of Innisfil which was prepared by Hemson Consulting Ltd.

MAP 1-2



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Table 1-2
Perspectives on Growth Prospects and Servicing Status for
South Simcoe Municipalities

Municipality	Housing Unit Increment		Long Term Forecast	Water and Sanitary Servicing
	10 Year Forecast	%		
New Tecumseth	3,000	13.3	6,844 (2021)	<ul style="list-style-type: none"> completion of Collingwood/ Alliston Water Transmission Line ensures adequate water supply for future development in Alliston and Beeton; future plan to link Tottenham to the line will allow additional growth in that community Regional STP in Alliston will require expansion to service development in Alliston and Beeton in the short term; completion of the planned Tottenham development will require additional capacity beyond the current STP capacity
Innisfil	2,932	13.0	6,810 (2021)	<ul style="list-style-type: none"> n/a
Barrie	13,140	58.4	25,084 (Buildout)	<ul style="list-style-type: none"> water currently supplied exclusively from groundwater (wells); surface water treatment plant forecast estimated to be required by 2005 City has a continuing expansion plan for the WPCP; most recent expansion was 1998 to date, City has ensured that servicing capacity is available well in advance so that development is not constrained
Bradford West Gwillimbury	2,250	10.0	5,200 (2016)	<ul style="list-style-type: none"> water supply is from wells; EA underway to identify additional water source STP has sufficient capacity only for +/- 10 years' growth
Essa	1,180	5.3	2,110 (2016)	<ul style="list-style-type: none"> only fully serviced area is Angus very limited servicing capacity available; major expansion required to support projected development
Total	22,502		n/a	

¹Excluding Adjala-Tosorontio which has no fully-serviced areas.

Source: Municipal Development Charge Studies, 1999.

Municipal servicing constraints can significantly impact on the functioning of the housing market, diverting growth to another municipality in the market area. In South Simcoe, all municipalities with the exception of Essa (Angus) currently, have sufficient servicing capacity until approximately 2009 (or beyond).

2. APPROACH AND METHODOLOGY

2. APPROACH AND METHODOLOGY

2.1 Population and Housing Unit Forecast

The methodology used to forecast population, housing units and employment in New Tecumseth needs to recognize the unique combination of locational (and other) factors which impact the Town, primarily:

1. The Town's location immediately adjacent to the Province's major growth centre, the Greater Toronto Area (GTA)
2. The Town's role in accommodating a share of the substantial growth forecast for the GTA's outer "ring" (known as the Greater Golden Horseshoe (GGH)) over the next 20-30 years
3. The impact that servicing constraints have had on the Town's historical rate of growth
4. The impact of accommodating one of the Province's major industrial enterprises (Honda)

There are two major methodologies used to forecast population and households:

Cohort Survival (Population-based Forecast) – This approach uses as its base, five year 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 is added an assumed rate of net migration (immigration to the municipality less outmigration, by age group). To forecast the number of households, headship rates are determined for the family forming age groups; these are translated to housing units, usually based on historical market preference by household head age group.

Housing Market (Housing Market Forecast) - This approach focuses on the rate of historical housing construction in the municipality and surrounding area, adjusted to incorporate factors such as servicing constraints. The population is then forecast by developing assumptions on average household size by unit type, taking into

consideration the higher average occupancy of new units, and the decline in persons per unit over time. This approach is premised on the assumption that new housing units will exhibit similar demographic characteristics over time as existing units.

New Tecumseth's particular circumstances are not amenable to the Cohort Survival approach to population forecasting. The majority of the population growth in the Town will be generated by immigration, since the Town is part of the large GTA housing market. Internal changes (births minus deaths) relating to the current population will make only a minimal contribution to (net) population growth. Further, the rate of immigration is very difficult to forecast and information about the demographic characteristics of the historical immigrating population is very limited.

The Province's 1995 "Projection Methodology Guideline" references the use of a modified "Cohort Survival" methodology by using five year age groups as the basis for the forecast. However, these types of projections are only available for the County (based on a disaggregation of a Provincial forecast), and not by local municipality¹. Moreover, the guideline states that "the projections for the counties, districts and regional municipalities are mathematical calculations of what the future population might be ..." They do not incorporate specific assumptions about infrastructure investment or public policies relating to regional development ..." (pages 10 and 12) In a County such as Simcoe, these are major determinants of future population levels.

Nevertheless, there are long term demographic trends which will affect the overall Provincial and GTA population, as the large "baby boomer" generation moves into the empty nester/retirement age groups (50+ years), followed by a smaller family forming cohort (20-40 years), and child/youth cohort (0-19 years). On a large area basis (Province and the GTA), these will have a substantial impact. Although, for smaller family-oriented housing sub-markets within these areas like New Tecumseth, the effect will be moderated, some consideration needs to be given to these trends.

The Housing Market Forecast projects population over time by utilizing housing supply and demand factors. The historical rate of residential unit production, both in the municipality and surrounding area, represents the most reliable evidence of the market response to the

¹ The South Simcoe area is actually identified as part of the Greater Toronto Housing Market in Appendix B of the "Projection Methodology Guideline." No population data by age group is available for the partial County area.

attractiveness of a municipality (although these need to be considered in the context of supply constraints over the period). Further, there is an obvious direct linkage between housing supply and population growth. The basic tenets of the housing market model approach are included in the Province's 1995 "Projection Methodology Guidelines", as the "Simpler Methodology." However, the described approach in that report assumes the availability of an up-to-date population forecast for the Town which is a component of the terms of reference for this study.

In light of these considerations, the selected approach to undertaking the population and housing unit forecasts for New Tecumseth combined the two major projection approaches by:

- **Using the housing market model to forecast population, taking into consideration housing supply and demand factors**

This generates a population forecast through the use of a model developed by CNWA, primarily based on housing demand. Input on future demand includes historical experience in New Tecumseth, and surrounding South Simcoe municipalities, as well as interviews with real estate and development industry representatives active in the Town. Consideration will also be given to servicing constraints in other municipalities which may affect the Town's housing demand, as well as the distinct housing markets within the New Tecumseth communities (e.g. Briar Hill development).

- **Testing the reasonableness of the housing market forecast by comparing it to a range of long term population forecasts for the Town, based on appropriate shares of projections completed, in whole or in part, for the larger market area**

These include forecasts prepared for sections of the GTA and the Greater Golden Horseshoe (GGH), as well as forecasts prepared for the County of Simcoe by the Provincial Ministry of Finance. Forecasts being used by the Ministry of Transportation in their on-going highway needs assessment studies will also be considered, along with the County of Simcoe Official Plan forecast. Most of these forecasts were undertaken using variations of the cohort survival approach, which, in turn, incorporate this element into the New Tecumseth forecast.

The combination of these two approaches incorporates demographic and housing market variables, as well as a verification of the reasonableness of the resulting population forecast.

Figure 2-1 illustrates the approach graphically, with Figure 2-2 providing similar information for the housing market approach.

The allocation of the total Town population and household forecast for the required years (as specified in Section 1.2) to the major community areas -- Alliston, Beeton, Tottenham, Briar Hill development -- and the identified hamlets (Section 1.2) is undertaken as part of assessing the different housing markets in New Tecumseth.

2.2 Employment Forecast Methodology

Figure 2-3 outlines the approach to forecasting employment through the use of the activity rate method. This method utilizes the relationship between employment and population to forecast future jobs in the Town, as set out in the Provincial “Projection Methodology Guideline.” The employment sectors identified in that study and used by many municipalities include:

- **Primary** – agriculture and resource-based employment
- **Home-Based** – persons who work at/from home
- **Employment Lands Employment** – “jobs that have traditionally been called ‘industrial’ and are found in specifically designated industrial or business parks”¹
- **Population-related (excluding Institutional) Employment**- jobs that provide direct services to meet the personal needs of the population, located in commercial and office areas, in residential areas (e.g. local plazas, schools), and to some extent, in industrial areas (dependent, in part, on zoning provisions).
- **Institutional** – jobs in public sector organizations, including the Federal, Provincial, municipal, school board and hospital sectors

Future activity rates by sector are affected by a number of variables identified in Figure 2-3. These include economic trends (e.g. the increase in home based businesses), commuting patterns (both incommuting to current jobs and outcommuting of residents to jobs outside the municipality), labour force participation rates (e.g. number of 65 years+ residents who are not in the labour force), and unemployment rates.

¹ “Projection Methodology Guideline” (page 65)

FIGURE 2-1

SCHEMATIC ILLUSTRATION OF APPROACH TO TOWN OF NEW TECUMSETH GROWTH FORECAST

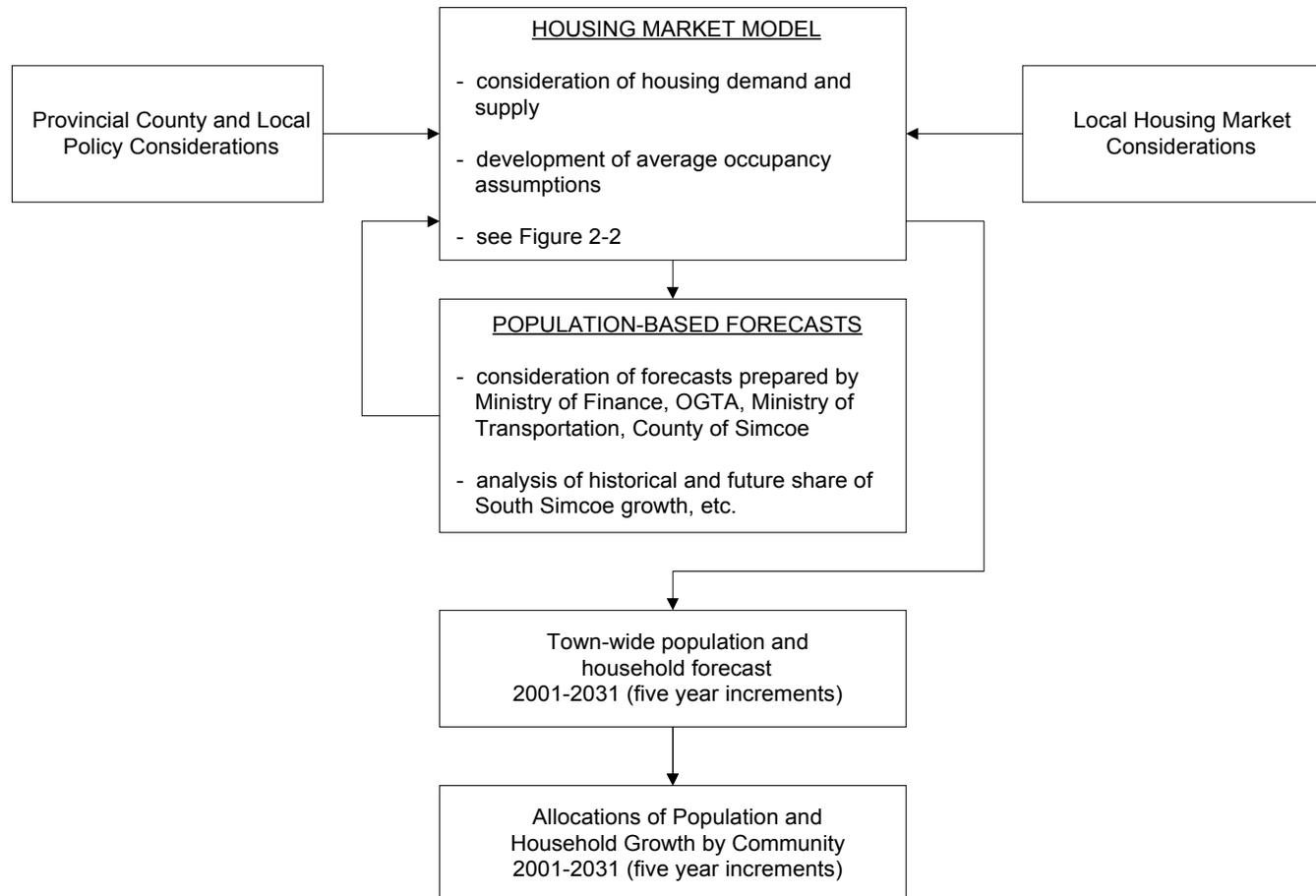
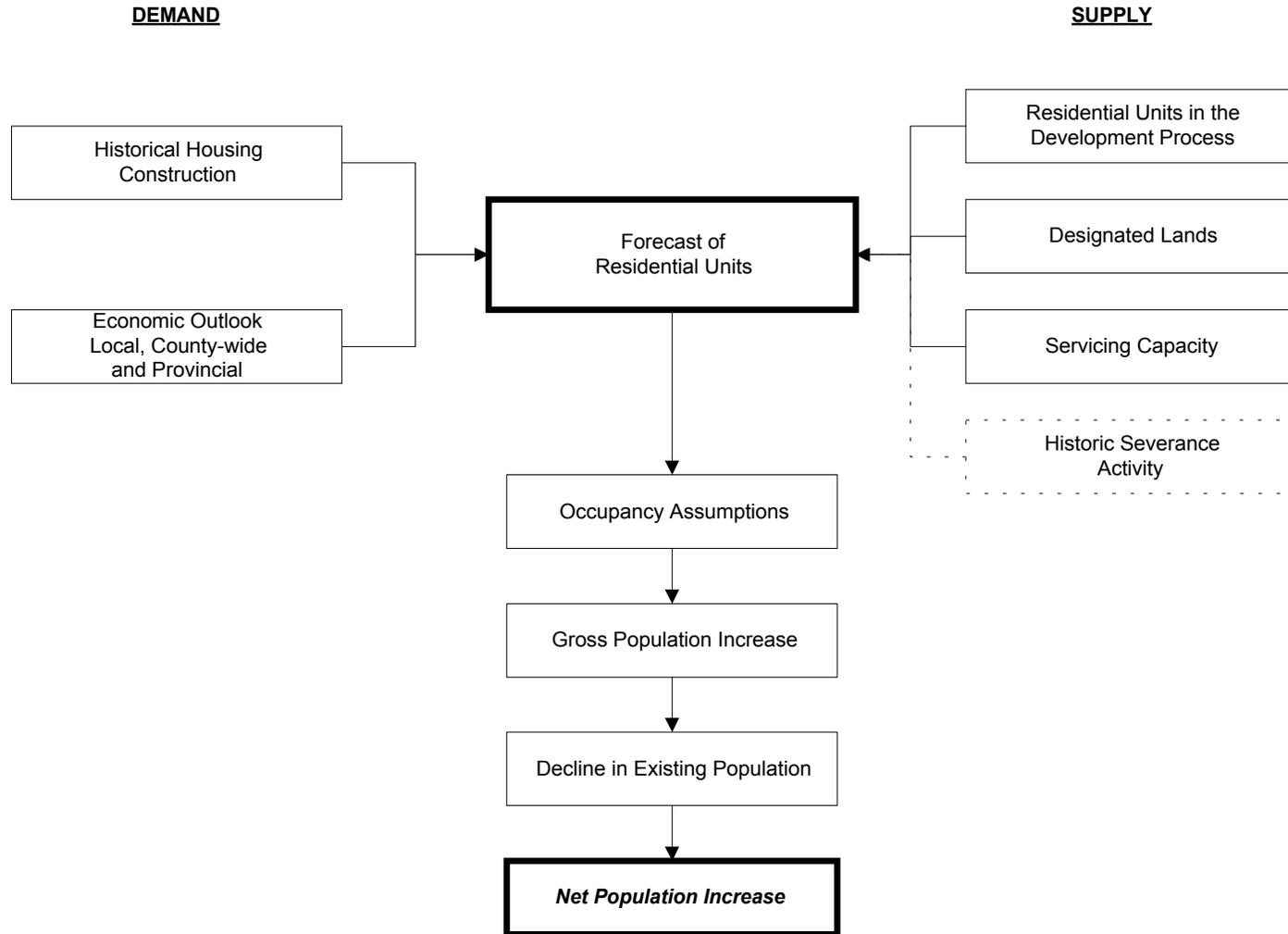
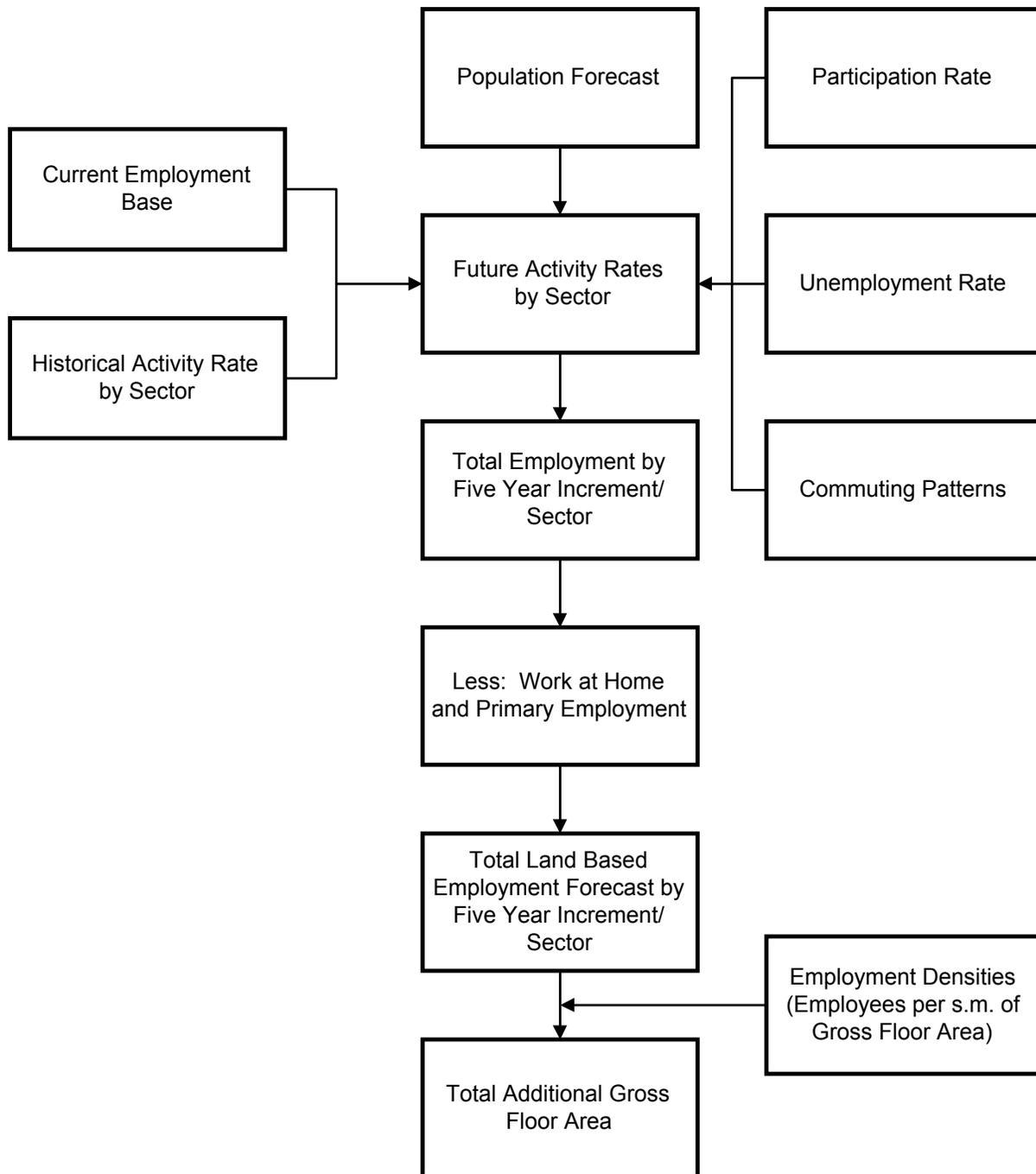


FIGURE 2-2
MARKET DRIVEN POPULATION AND HOUSEHOLD PROJECTION MODEL



**FIGURE 2-3
SCHEMATIC APPROACH TO NON-RESIDENTIAL FORECASTING
METHOD**



Total employment is forecast by sector in five year increments, based on the (adjusted) activity rates by sector and the population forecast. The land-based employment increment is calculated (by excluding home-based and primary employment) in order to determine additional gross floor area requirements. Total employment is calculated based on average square metre per employee assumptions, considering existing data, adjusted as necessary.

3. DEMOGRAPHIC PROFILE

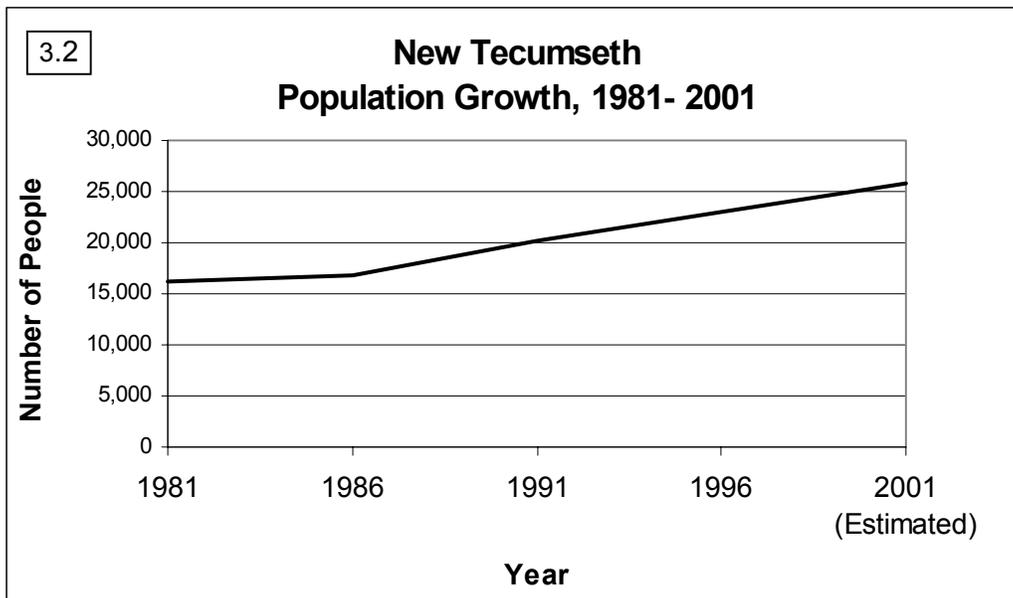
3. DEMOGRAPHIC PROFILE

3.1 Introduction

This Chapter summarizes the current situation and key trends in the Town of New Tecumseth's population and household profile. Each characteristic/trend is illustrated graphically with the major conclusions set out below each graph. The analysis relies on Census of Canada, Statistics Canada, CMHC and Ministry of the Solicitor General sources. Since the most recent Census data available is the 1996 data, there may be some changes in the intervening five years.

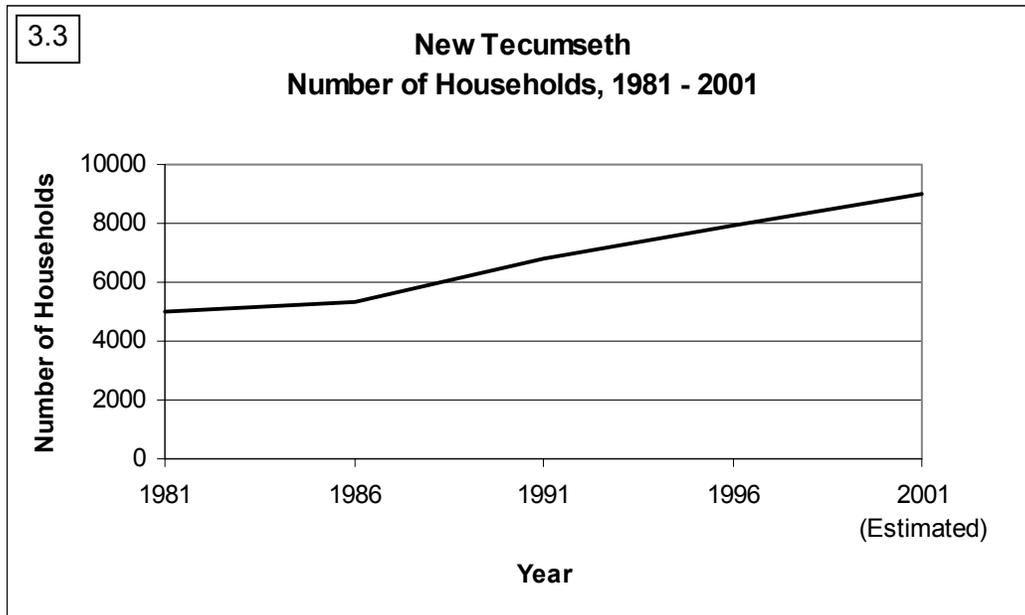
Sections 3.2 to 3.10 analyse various population and household characteristics in New Tecumseth and the geographic distribution among the four areas (Alliston, Beeton, Tottenham and Tecumseth).

Section 3.11 looks at a broader perspective, analysing the Town's historical role in household growth in the County of Simcoe and the relationship of Town growth to levels of growth in Barrie, North and South Simcoe.

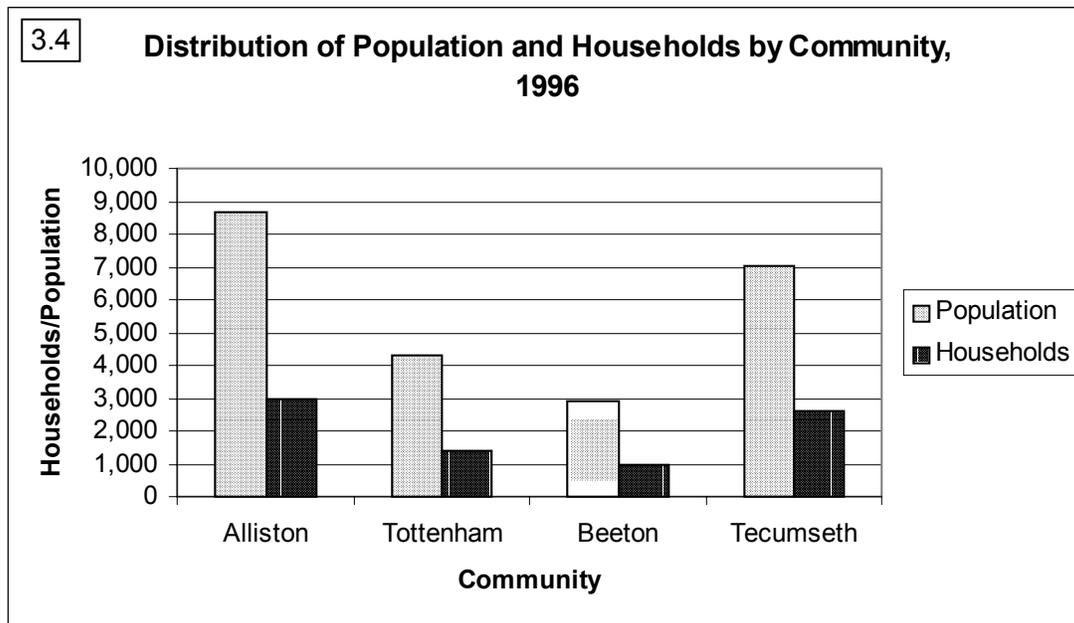


The population of New Tecumseth grew from 16,215, in 1981, to 22,902, in 1996, an increase of 41% (6,695 persons). The most significant period of population growth occurred during 1986 – 1991. During this five-year period, the Town population increased 20% (3,380 persons), due in part to the commencement of the Briar Hill development, as well as the generally favourable economic conditions which existed at that time. Between 1991 and 1996, the population grew by 13% (2,650 persons). Between 1996 and 2001, the most recent period, the population is estimated to have grown by 13% (2,947 persons) to a total of 25,800¹. The Town did not benefit from the most recent housing boom as much as some other municipalities, due to servicing constraints in Alliston and Beeton.

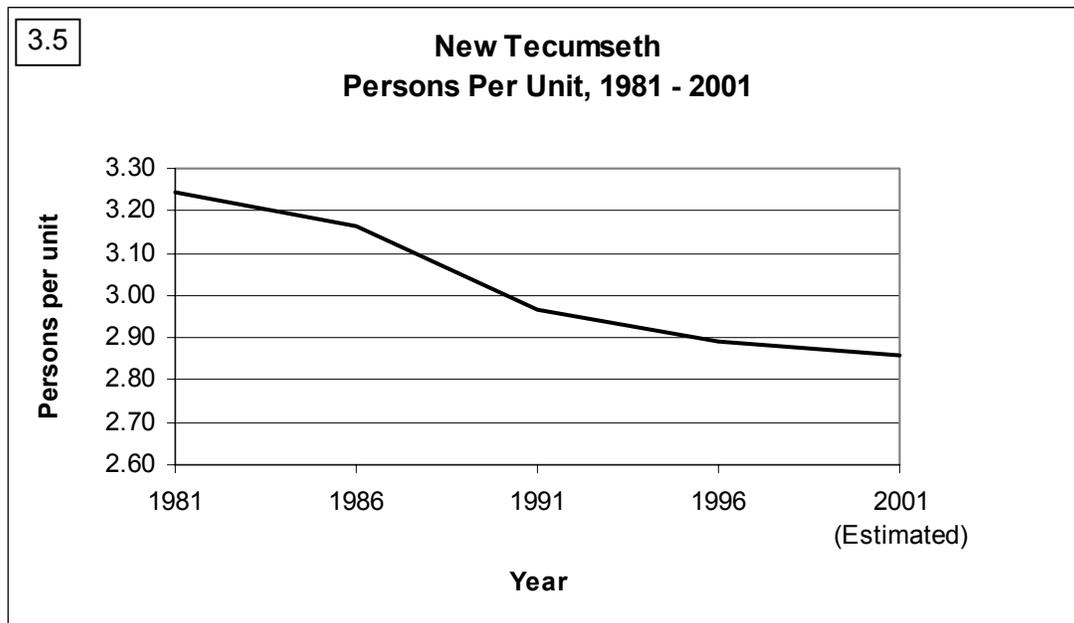
¹Population estimate has been rounded to the nearest hundred.



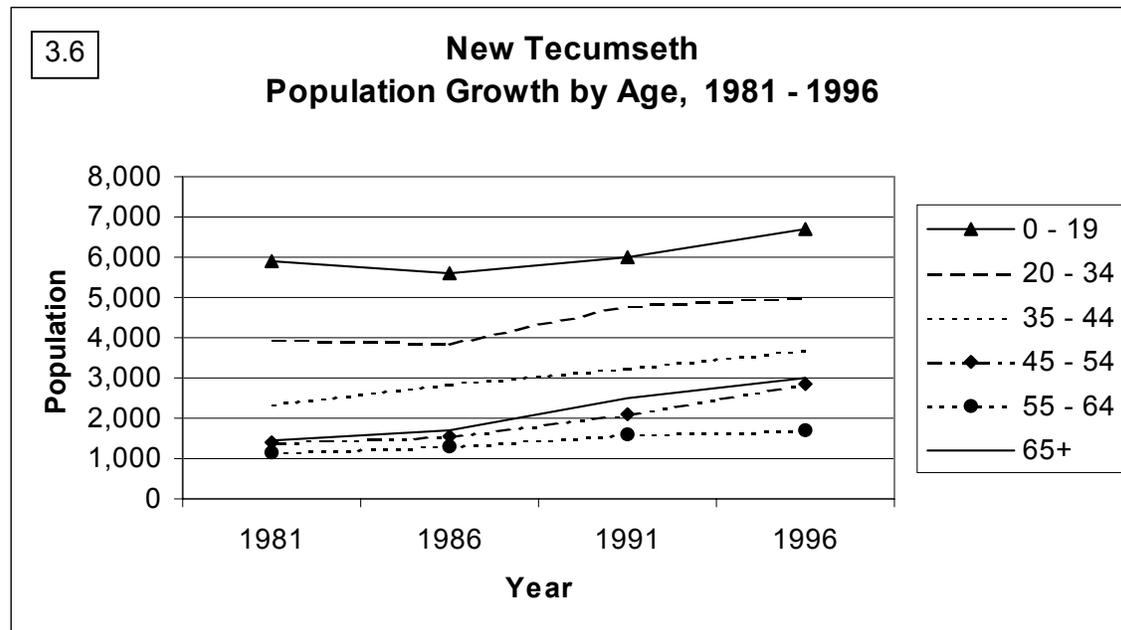
Between 1981 and 1996, the total number of households grew from 5,000 to 7,925, an increase of 2,925 (average annual rate 3.1% compounded). The most significant increase occurred from 1986 – 1991 (5,335 to 6,825 households). During this five-year period, New Tecumseth experienced a 28% (1,490 households) increase in the total number of households. Between 1991 and 1996, the number of households grew by 16% (1,100 households). From 1996 to 2001, the most recent period, household growth increased by 14% (1,075 households) to approximately 9,000 households. Households have increased at a faster rate than population due to the decline in average household size, in part as a result of the establishment of the retirement community (Briar Hill).



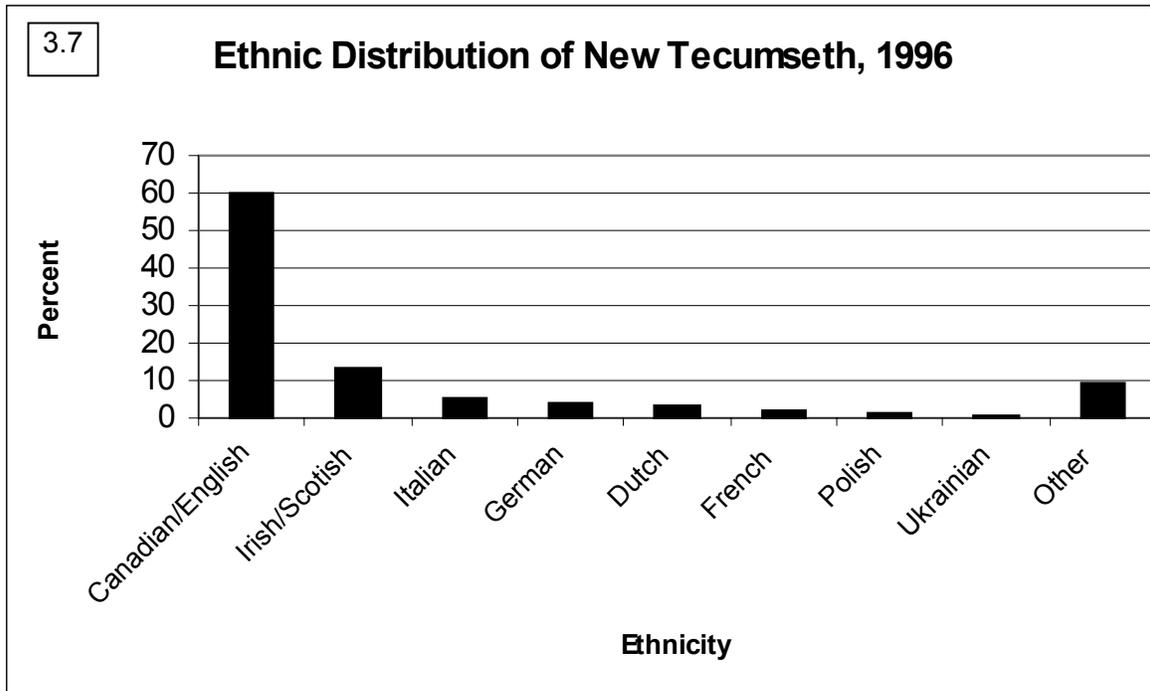
Approximately 67% of the total population and households within New Tecumseth are located within the three urbanized areas. In 1996, 37% (8,687 persons) resided in Alliston, 19% (4,322 persons) in Tottenham, 13 % (2,886 persons) in Beeton, and 31% (7,007 persons) within the former Township, including the Briar Hill development (Tecumseth). In 1996, (approximately) 2,938 households were located in Alliston, 1,411 in Tottenham, 958 in Beeton, and 2,613 in Tecumseth (7,925 total).



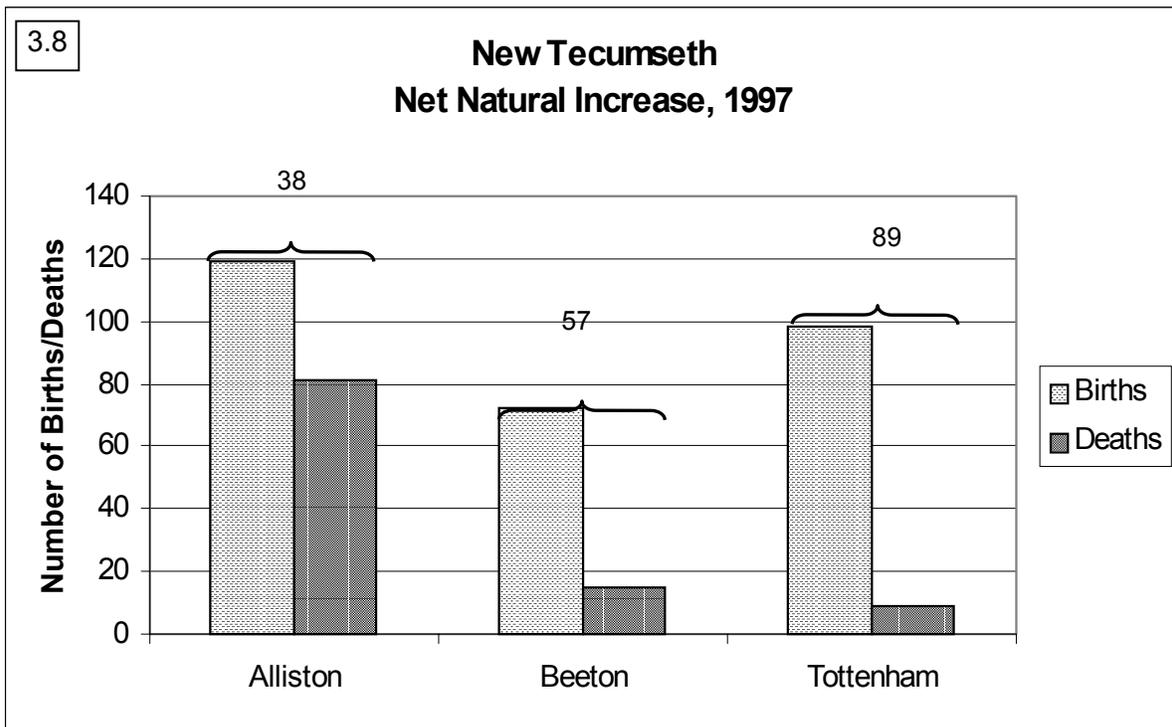
From 1981 to 1991, the persons per unit (ppu) factor decreased from 3.24 to 2.97. This was due in part to the commencement of the Briar Hill development. The rate of decline over the 1991 to 2001 period has slowed considerably from 2.97 to an estimated 2.86 in 2001 (-4%), consistent with the trend to slowing rates of decline elsewhere.



In 1996, the 0-19 cohort accounted for 29% of the total population, down from 34% in 1981. The 20-34 cohort accounted for 22%, down from 24% in 1981. The 35-54 cohort accounted for 29%, up from 23% in 1981. The 55+ cohort accounted for 21%, up from 16% in 1981. The 20 - 44 cohort, comprising 8,685 persons or 37% of the total 1996 population has experienced the largest net growth since 1986 at 27% (6,720 persons). The consistent growth of the 20 – 34 cohort is indicative of the increasing Town role as a home location for commuters, and to a lesser extent, good employment opportunities (e.g. Honda and related firms). It also signals a strong young family housing market. The rapid growth in the 65+ cohort (23% of the net population growth since 1986) indicates the presence of a major adult lifestyle development and, to a lesser extent, the aging of the population.

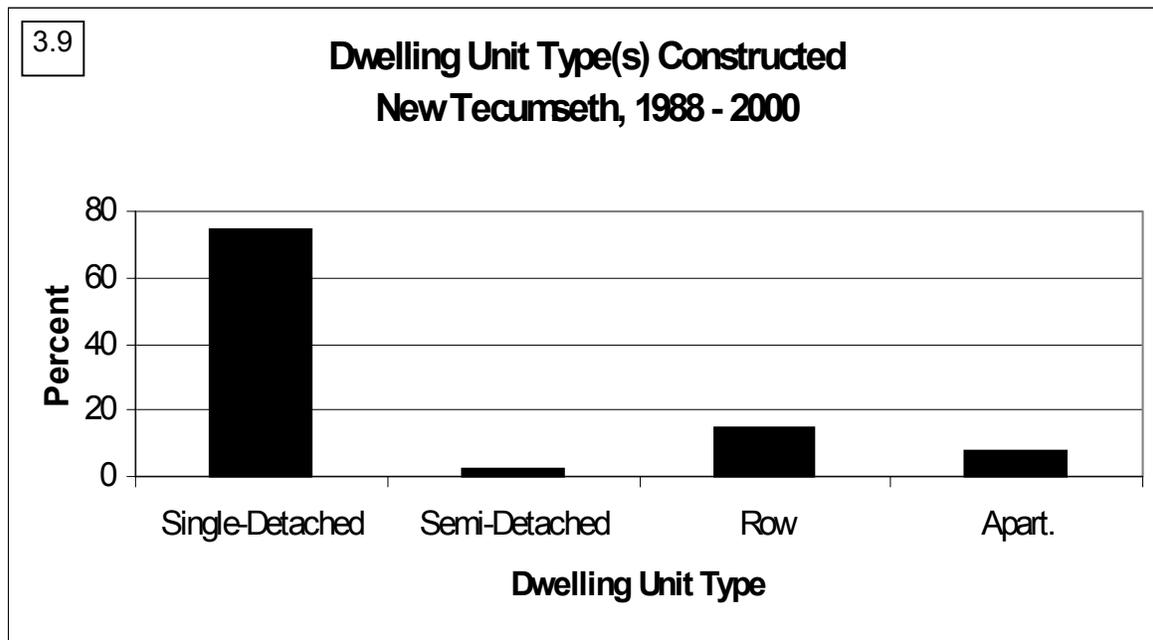


In combination, approximately 74% of the population identified their ethnicity as Canadian or British extraction, with 26% of the total population belonging to other ethnic groups, each of which represent no more than 5% of the total.



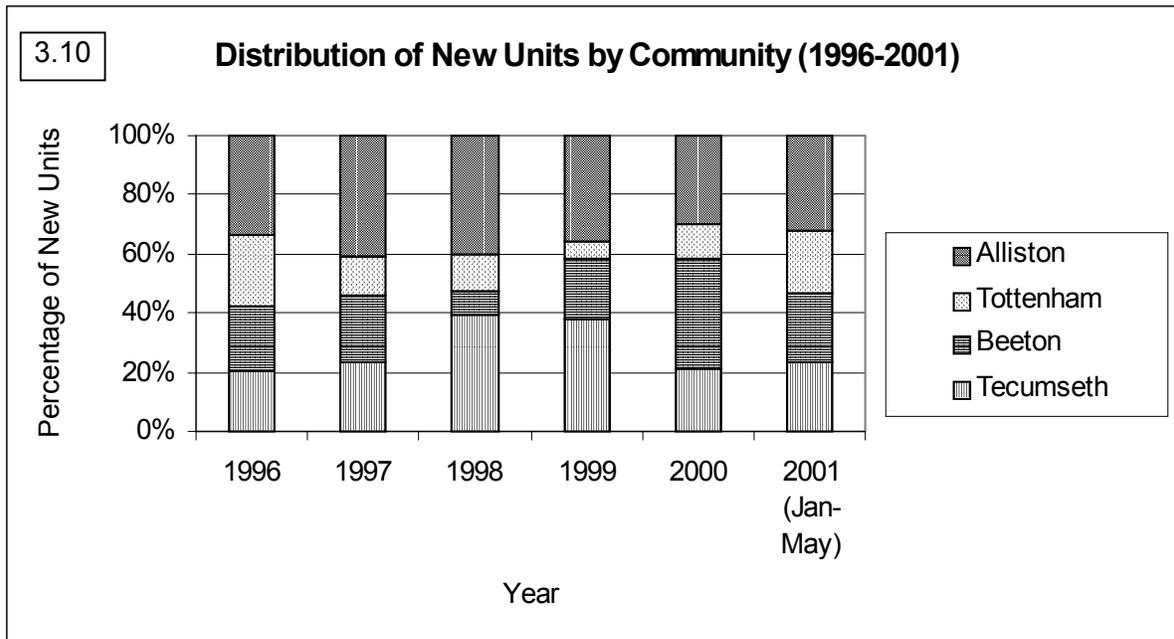
Births totalled 289 for New Tecumseth residents in 1997, with deaths totalling 105. In 1997, the three urban areas of New Tecumseth (Alliston, Beeton, and Tottenham) experienced a net natural increase of 184 people¹.

¹ Data for Tecumseth is not available; Alliston data probably included the Briar Hill community.

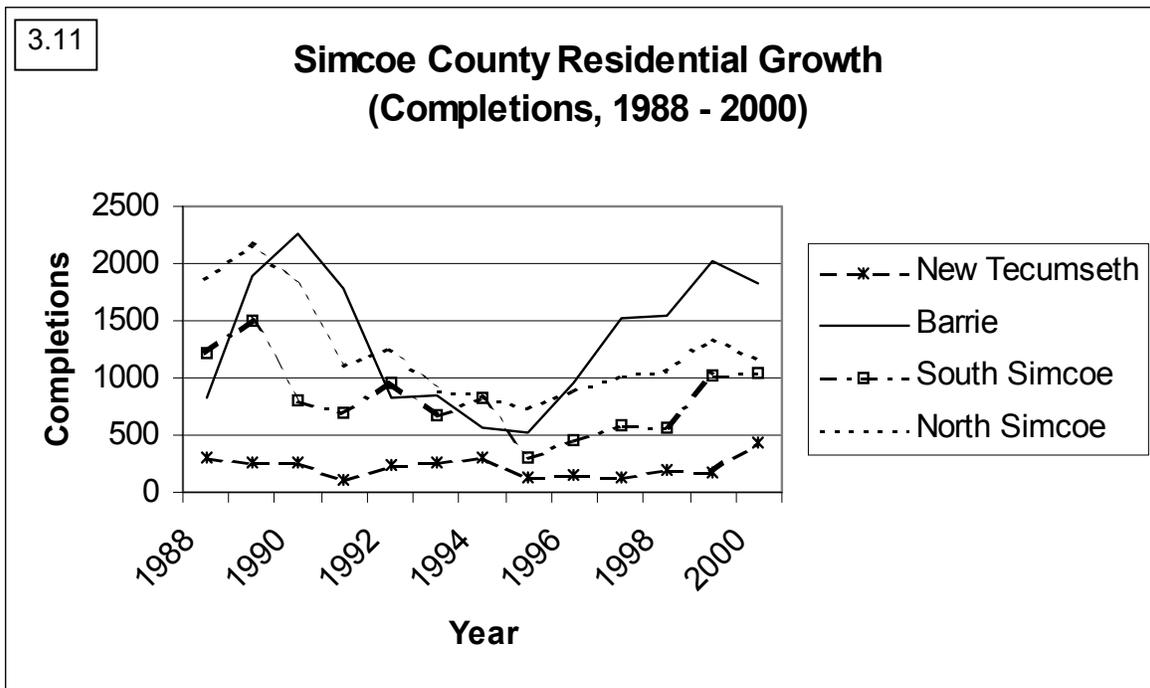


Approximately 77% (2,250) of total residential dwellings constructed from 1988-2000 were single and semi-detached. The total number of apartments constructed (8% - 235 units) is a result of only three projects completed in 1989, 1992, and 2000¹. The data does not indicate any movement towards apartment developments in New Tecumseth. Single-detached dwellings will likely continue to dominate the new housing market, with the municipality's strong attraction to family households.

¹ This data does not include basement apartments, for which there is no reliable source of data.



Since 1996, on average, 27% of total new residential units constructed within New Tecumseth have been located in Alliston, 26% in Tottenham, 19% in Beeton, and 28% within the former Township (Tecumseth). The large share of new units in Tecumseth may be attributed to the Briar Hill development, which represented approximately 40% of the units in 1998 and 1999.



NOTE: Building permit data used where completions data unavailable.

On average, from 1988-2000, New Tecumseth accounted for 6% (2,922) of the total building completions recorded in Simcoe County. By comparison, Barrie accounted for 36% (17,383), North Simcoe 34% (16,222), and South Simcoe (excluding New Tecumseth) 23% (10,691). Typically, New Tecumseth has accounted for 4%-8% of the total new units constructed annually in Simcoe County. The 2000 figure for the Town (444 units) included 70 Briar Hill apartments as well as 117 townhouses.

4. POLICY CONTEXT

4. POLICY CONTEXT

4.1 Town of New Tecumseth Official Plan

The Official Plan provides policy direction for future growth in the Town of New Tecumseth. Specific policies relevant to the preparation of a new forecast include:

“4.6.1 It is the policy of the Town to concentrate residential, commercial, industrial and institutional land uses in urban settlement areas.

4.6.2 For the purposes of this Plan there are three urban settlement areas: Alliston, Beeton, Tottenham....

4.6.4 It is the intent of the Town that the future servicing strategy will provide for growth opportunities for all three urban communities...” (page 4-6)

Amendment No. 21 (approved by Council in Fall 1999) updated the O.P. population forecast by community as follows:

**TABLE 4-1
TOWN OF NEW TECUMSETH
TOTAL POPULATION, BY COMMUNITY**

YEAR	COMMUNITY				
	Alliston	Beeton	Tottenham	Tecumseth	TOTAL
1976	4,154	1,604	2,746	5,800	14,304
1981	4,730	1,989	3,033	6,456	16,208
1986	4,844	2,154	2,958	6,898	16,854
1991	7,579	2,210	3,200	7,250	20,239
1996	--	--	--	--	22,900
2001 (Proj.)	--	--	--	--	25,900
2006 (Proj.)	--	--	--	--	29,285
2011 (Proj.)	--	--	--	--	33,130
2016 (Proj.)	--	--	--	--	37,485
2021 (Proj.)	18,920	3,220	9,360	10,900	42,400

Source: Table 1 (projections by MHBC Planning Limited)

The 2021 projected distribution of growth by community and the 1996-2021 growth increment is as follows:

	2021 Population Distribution by Community %	1991-2021 Increment	
		No.	%
Alliston	44.6	11,341	51.1
Beeton	7.6	1,010	4.6
Tottenham	22.1	6,160	27.8
Tecumseth	25.7	3,650	16.5
Total	100.0	22,161	100.0

Secondary plans have been completed for Alliston, Tottenham and the Briar Hill development which provide background growth information and policies specific to each community. The background information relevant to the forecast is as follows:

- **Alliston** (Amendment 21) – The primary land use in this secondary plan area is residential. The housing distribution in the OPA (Policy 10.3.1.2b) is:

Low Density	66%	2,111 units
Medium Density	17%	544 units
High Density	17%	543 units
Total	100%	3,198 units

The total projected population for the Alliston community is 18,920 in 2021, an increase of 10,233 from the 1996 population of 8,687.

- **Tottenham** (Amendment 11)– The primary land use in this secondary plan area is residential, with the majority of the housing to be low density, “in keeping with the nature of existing residential neighbourhoods and market demand” (page 7). The development could accommodate up to 1,600-1,800 housing units. At the time of preparation of the OPA, approximately 1,200 units (inclusive of commercial space) could be serviced.

The current (1996) population is approximately 4,000 persons, with the estimated additional population generated by the Amendment ranging from 4,600 to 5,200 persons.

- **Briar Hill Development** (Amendments 1 and 23) - This development accommodates mainly retirees and empty nesters. The residents are drawn from a wide market area across the GTA (page 8). The development has proceeded in three phases: Green Briar (+/-500 units), which is built out; Briar Hill (+/- 900 units of which approximately half is built); and the most recent planned expansion, Briar Hill West (1,000 units), which is the subject of this amendment. The total number of units in the Briar Hill developments at build-out is 2,400.

The projected additional housing units and population (pages 4 and 8) in the Briar Hill West OPA is as follows:

	Units		Population
	No.	%	
Single, semis	520	52	1,040
Townhouses	300	30	600
Apartments	180	18	270
Total	1,000	100	1,910

The projected population for the complete community is as follows:

	Approximate Population
Green Briar	1,000
Briar Hill	1,660
Briar Hill West	1,910
Total	4,570

Secondary Plans and OPAs for Beeton and the Alliston Industrial Area have not yet been completed.

4.2 County of Simcoe Official Plan

The County Official Plan, approved in 1999/2000, includes population, housing and employment projections for the County, and by area municipality. The projections included in the plan, itself are for 2016, with more detailed information by area municipality included in an Appendix.

The results for the County and New Tecumseth are as follows:

	Population			Households	Employment
	1996	2016	Increment	2016	2016
County (including Barrie and Orillia)	328,783	487,800	159,017	184,320	201,700
New Tecumseth	22,902	32,300	9,398	11,700	8,710
New Tecumseth as a % of County	7.0%	6.6%	5.9%	6.3%	4.3%

However, the Plan states:

“The above projections are intended to be used as **guidelines** for growth in the County...Given the assumptions used in developing projections, the projections in Table 1 will be monitored and updated when appropriate and **are not considered as a limitation or target by which municipalities are constrained** provided that adequate justification, acceptable to the County, is provided where local projections exceed the projections in Table 1. Local projections **shall have regard to the projections** as a basis for their projections and allocations among settlements and rural areas” (page 12, bolding added)

The County has indicated its intention to update the growth forecast when the 2001 Census is available.

However, it is clear from this statement that New Tecumseth’s growth forecast is not constrained by the figure included in the County Official Plan (assuming adequate justification). Evidence of this fact is the projection in the current (County-approved) Town Official Plan which significantly exceeds the 2016 forecast in the County Plan (37,485 vs. 32,300).

4.3 Provincial

4.3.1 *Provincial Policy Statement*

Under the authority of Section 3 of the *Planning Act*, the provincial government issues a Provincial Policy Statement, which provides policy direction on matters of provincial interest related to land use planning and development. Section 3 of the *Planning Act* requires that, in exercising any authority that affects planning matters, planning authorities “shall have regard to” policy statements issued under the Act.

The principles upon which the provincial policy statements (PPS) are based are as follows:

“Ontario’s long term economic prosperity, environmental health and social well-being depend on:

- i) managing change and promoting efficient, cost-effective development and land use patterns which stimulate economic growth and protect the environment and public health;*
- ii) protecting resources for their economic use and/or environmental benefits; and*
- iii) reducing the potential for public cost or risk to Ontario’s residents by directing development away from areas where there is a risk to public health or of property damage” (p. 1 of the Provincial Policy Statement).*

The matter of determining land needs is addressed in Section 1.1.2 of the PPS, where the following is noted:

Land requirements and land use patterns will be based on:

- (a) the provision of sufficient land for industrial, commercial, residential, recreational, open space and institutional uses to promote employment opportunities, and for an appropriate range and mix of housing, to accommodate growth projected for a time horizon of up to 20 years (p. 3 of the PPS);*
 - (b) densities which (i) efficiently use land, resources, infrastructure and public service facilities; (ii) avoid the need for unnecessary and /or uneconomical expansion of infrastructure; (iii) support the use of public transit, in areas where it exists or is to be developed; (iv) are appropriate to the type of sewage and water systems which are planned or available; and (v) take into account the applicable policies of Section 2: Resources, and Section 3: Public Health and Safety;*
-

-
-
- (c) *the provision of a range of uses in areas which have existing or planned infrastructure to accommodate them;*
- (d) *development standards which are cost effective and which will minimize land consumption and reduce servicing costs; and*
- (e) *providing opportunities for redevelopment, intensification and revitalization in areas that have sufficient existing or planned infrastructure.*

4.3.2 Smart Growth

The Province has set out a commitment to “Smart Growth” as a key priority. Smart Growth has been defined as “a vision that promotes and manages growth to sustain a strong economy, strong communities and a healthy environment.” Through its consultation process, the government has identified the need to address and link decisions on such issues as transportation, infrastructure, land use, housing and public investment, and to ensure that these choices are appropriately balanced with elements vital to Ontario’s quality of life.

In Spring 2001, the Province undertook a consultation process to stimulate discussion on Smart Growth. In August 2001, the results of the consultation process were released in a publication entitled, “*Listening to Ontario, Ontario Smart Growth, A Summary of Consultations*”. The consultations were carried out throughout Ontario and the results have been organized by the following regions: north, east, GTA, central, and south-west.

The Smart Growth Goals that were identified for the Central Region¹, (which would include New Tecumseth) are as follows:

- i) Use existing infrastructure and resources to increase the capacity of economic growth; invest wisely in new infrastructure;
- ii) Manage growth by making tough choices about where development should go;

¹ Consultations in the Central Region took place in Barrie, Orangeville, Niagara-Hamilton, and Kitchener-Waterloo.

-
-
- iii) Strengthen quality of life by developing vibrant and attractive communities with facilities, services and green spaces that people want;
 - iv) Respect the environment by promoting measures that aim to reduce the impacts on air, land and water; and
 - v) Encourage growth in areas where it will have the least impact on the environment.

A Smart Growth Secretariat has been established within Ministry of Municipal Affairs and Housing to develop a long-term overall Smart Growth strategy for the province. The Province intends to establish Smart Growth Management Councils for each geographic region. Consultations are now underway to define the mandate, exact boundaries, and membership of the Smart Growth Councils.

4.3.3 Oak Ridges Moraine

The proposed *Oak Ridges Moraine Protection Act, 2001* was passed by the legislature in May, 2001 to provide for a six month moratorium on new development on the moraine. The advisory panel's recommendations on the future of the moraine, which forms the major drainage divide between Lakes Simcoe and Ontario, would provide defined settlement areas, the only area where urban land uses would be permitted.

If the proposal becomes law, the major loss in development area would occur in York Region, particularly the Town of Richmond Hill, and to a lesser extent in Peel Region. In order to assess whether this reduction would impact on the market for housing in other municipalities (such as New Tecumseth), discussions were held with Planning staff in York and Peel. In York, they are currently undertaking a review of this issue, but their preliminary results show that other areas of the Region could accommodate the growth which was planned for the Oak Ridges Moraine, if required.

In Peel Region, planners indicated that any impact would be limited to Caledon. The treatment of the Palgrave estate residential area represents the primary potential impact; it is unlikely, however, that this market segment could be accommodated in New Tecumseth, even if there is insufficient land in Peel. The Region is waiting to see the final legislation to determine this.

On November 1, 2001, the Province introduced legislation to protect the Oak Ridges Moraine, based on the Advisory Committee recommendations. One of the associated provisions, along with the legislation (the *Oak Ridges Moraine Conservation Act, 2001*), is a “land swap” whereby lands with development applications in Richmond Hill would be exchanged for lands of equal value in the Provincially-owned land bank in Seaton (North Pickering).

As a result, it is not anticipated that this (potential) Provincial policy would impact on New Tecumseth’s future growth rate.

4.3.4 Highway 427 Extension

In November 2001, the provincial government released the results of the *Highway 427 Extension Transportation Needs Assessment Study*. The study is defined as an “area transportation study undertaken to address the future north-south travel demands from Highway 401 north to the Collingwood/Barrie area and bounded by Highway 410/10 in the west and Highway 400 in the east.” The study was long term in its scope, assessing transportation needs for beyond 2031. The Town of New Tecumseth is situated within the study area and as such, may be impacted in the future by the implementation of the study’s recommendations.

Key among the conclusions is the two-part recommendation that by 2031 (i) there will be a transportation demand in the Highway 400 corridor for up to 10 lanes to Barrie; and (ii) Highway 427 should be extended at least as far as the vicinity of Highway 89. Highway 427 could then tie back in with the widened Highway 400 and also be linked to Highway 89.

An extension of Highway 427 has the potential to increase residential and employment growth in the Town of New Tecumseth.

5. TOWN-WIDE POPULATION/HOUSING UNIT FORECASTS

5. TOWN-WIDE POPULATION/HOUSING UNIT FORECASTS

5.1 Key Assumptions

This forecast is based on a number of key assumptions set out below:

1. Municipal water and sanitary sewer capacity will be available as needed in the communities of Alliston, Beeton and Tottenham to accommodate development.
2. No additional municipally serviced urban communities will be approved.
3. No other local (or Provincial) land use constraints will impact on the ability of the three communities to accommodate housing demand.
4. Transportation improvements in the form of additional expressway capacity will be available in the South Simcoe area on an “as needed” basis (i.e. either an expanded Highway 400 or an extended Highway 427).
5. The Briar Hill development will not be expanded beyond OPA 23.
6. No additional privately serviced major residential developments will be approved in the Town.
7. The City of Barrie will not be constrained in accommodating its share of the housing market.
8. Economic cycles which will inevitably impact on specific years’ growth, have not been incorporated into the forecast. Annual rates of growth have been averaged over the period.¹

¹ Analysis was undertaken on the population projections prepared for other market area segments to determine the assumptions made with respect to growth rates early vs. later in the 30 year period. The results were inconsistent, and therefore none was incorporated in the Town forecast.

5.2 Previous New Tecumseth Growth Forecasts

Table 5-1 summarizes the most recent available population growth forecasts available for the Town of New Tecumseth. It includes the current (Town) Official Plan targets (which were approved in 2000), 1992 Town Official Plan targets, and recent (unpublished and unofficial) forecasts being used in Ministry of Transportation Highway Planning studies.

The population forecast ranges and increments¹ are as follows:

	<u>Total</u>	<u>Increment</u>
2011	29,900-34,100	
		6,400-13,700
2021	40,500-43,600	

The only Town forecast available for 2030 is the (unpublished) MTO forecast of 47,800-49,800 (a 30 year increment of 21,200- 23,200).

5.3 Housing Market Approach

The housing market model utilizes housing demand and supply to forecast future population levels, as outlined in Chapter 2.² The forecast of the Town's rate of housing unit construction is used to produce a population projection, taking into consideration decline in household size in older units, and average occupancy levels in newer units (which tend to be higher, particularly in family oriented single detached units).

¹ excluding the unsourced Tatham analysis.

² This method was also used in preparing forecasts for the Town's 1992 and 1999 Development Charge Studies.

TABLE 5-1
RECENT NEW TECUMSETH GROWTH FORECASTS
(000)

	1996	2001	2011	2021	2030	10 Year Increase		20 Year Increase
						2001-2011	2011-2021	2001-2021
2000 Official Plan Targets ¹	22.9	25.9	33.1	42.4		7.2	9.3	16.5
Alliston Secondary Plan Retail Analysis Report ²	23.6	26.7	34.1	43.6	n/a	7.4	9.5	16.9
Ministry of Transportation Planning Forecasts ³		26.6	33.1 - 33.2	40.5 - 41.3	47.8 - 49.8	6.5	7.4 - 8.1	13.9 - 14.7
1992 Official Plan ³ (Final Report on Housing)	22.9	25.0	29.9	n/a	n/a	4.9	n/a	n/a
Simcoe County Official Plan forecast for New Tecumseth ⁵	22.9	25.3	30.0	n/a	n/a	4.7	n/a	n/a
Sewage Treatment Plan Capacity Analysis, 1995 ⁶	23.4	25.5	30.5	36.5	42.9	5.0	6.0	11.0

¹ Included in Official Plan Amendment No. 21, Table 1, page 8, October 2000

² Retail Market Needs Study, Alliston Secondary Plan, May 1999, W. Scott Morgan, Table 1

³ Unpublished Ministry of Transportation population forecasts, used for highway planning purposes (2001)

⁴ Town of New Tecumseth Official Plan, "Final Report on Housing", Brethour Research Associates Limited, November 30, 1992, Table 1

⁵ The County Official Plan forecast for New Tecumseth is 32,300 in 2016, approx. equivalent to the 2011 numbers for the first three forecasts on this table.

⁶ Appendix K, "Land Use, Population Forecast and Sanitary Sewage Flow Design Criteria", C.C. Tatham & Associates Ltd., 1995, Table K.2

The **initial** step involved researching the various influences on the Town's future housing unit growth rate. These are summarized below:

1. Population forecasts for the GTA and the County of Simcoe prepared by the Ministries of Finance and Transportation, as well as the Office of the Greater Toronto Area are optimistic and project much higher growth levels than the County Official Plan (in the range of +/- 16% higher).
2. The Town's Official Plan policies provide for major expansion of Alliston, Tottenham and the Briar Hill development, which will provide for growth of approximately 6,400 units.
3. The units in the development process, which are summarized in Table C-3 (Appendix C), indicate that there are development interests proceeding with applications in all of the communities in New Tecumseth, with 3,553 units draft approved and an additional 1,917 units in OMB referral or future proposed (and 1,755 in registered but not built).
4. The Town's growth rate, particularly over the past five years, has been constrained, so that historical building permit issuance for new units which averaged 200 units over the past nine years does not provide an adequate indicator of New Tecumseth's future potential.
5. One of the surrounding municipalities occupying the same South Simcoe market area is expected to experience some growth constraints due to servicing (e.g. Bradford West Gwillimbury), although this could be, at least partially offset, if servicing becomes available in Angus (Essa).
6. The Town's housing market is affected by the limited supply of rental housing, which restricts the market mainly to families (except for the retirement community of Briar Hill).
7. The City of Barrie is assumed to continue its practice of maintaining adequate levels of sanitary sewer and water capacity to meet the market.
8. New house prices appear to be somewhat higher in New Tecumseth than in Barrie.

9. Provincial planning policies relating to the Oak Ridges moraine are not expected to impact substantially on New Tecumseth's growth rate.
10. On-going Provincial highway planning programs indicate that the area will be serviced with adequate expressway road capacity for the Town to attract industry and continue its role as a commuter location for the northern GTA.
11. The real estate/development community consulted is generally optimistic about the Town's prospects, but also noted that the smaller size of the communities, the resultant more limited services, and the housing prices, and the communities' locations 10-15 km from a 400 series highway does limit the market. The presence of Honda was considered, by some, to offer a stabilizing factor to economic cycles of the overall GTA market.

The **second** step in the process was to forecast the number of new units which the Town could reasonably expect on an average annual basis. Discussions with Town staff and real estate/development representatives indicated that there is no single housing market for New Tecumseth, although there is some overlap among the family housing areas:

- The market for the Briar Hill development is distinct, has limited local impact, and draws mainly from the wider GTA market. Competition for the empty nester market is, however, increasing.
- The market for Tottenham draws, in large part, from north Peel, is attractive to those seeking a Village atmosphere, and willing to travel elsewhere for major services. There is some overlap with Alliston.
- Beeton is the smallest community with the most limited services. The community attracts mainly commuters seeking a country style/rural setting.
- Alliston is the largest community, with the widest range of services. The community has the only major industrial park and is the location for Honda and related industries. It also contains the largest retail facilities in the Town. Highway access impacts on the commuter market for Alliston.

- Due to the different housing markets, a forecast was developed for each community, taking into consideration the historical building activity, the units in the development process and the research set out above. An average annual rate of unit production was developed for each community, set out on Table 5-2. Over the 30 year period, Alliston is forecast to accommodate almost half the units (43%), with Tottenham at 24%, Briar Hill at 16%, Beeton at 11% and other Tecumseth at 6%.

The **third** step was to determine the unit mix in each community over the 30 year forecast period. This was done through analysis of the secondary plans, historical building permit issuance, units in the development process, and general market considerations. The assumptions are shown in Table 5-2a and Table 5-2b.

The **fourth** step was to determine the average occupancy which should be applied to the new units. This was done through the use of a Statistics Canada special tabulation data base for the Town on new units (Table C-5 in Appendix C). The new unit persons per unit (ppus) for single detached units are lower in New Tecumseth than surrounding areas; analysis of the data indicated that this was due to the Briar Hill units, with their lower occupancy. Decline in existing units has also been incorporated; however, this is also moderated by the empty nester population in Briar Hill.

The **fifth** step was to input this information into the CNWA model (see Table C-5 in Appendix C). Table 5-3a and Table 5-3b shows the results for the population forecast for each five year period. The 20 and 30 year total population and household increments (rounded) are as follows:

	Population		Housing Units	
	Total	Increment	Total	Increment
20 Year	42,900	17,100	15,200	6,200
30 Year	51,100	25,300	18,400	9,400

TABLE 5-2a
TOWN OF NEW TECUMSETH
AVERAGE ANNUAL HOUSING UNIT DISTRIBUTION BY COMMUNITY 2001-2021

Community	Average Annual Units 2001-2021				Unit Distribution 2001-2021			Area Distribution 2001-2021		
	Single/ Semi-Detached	Townhouses	Apartments	Total	Singles/ Semi-Detached	Townhouses	Apartments	Singles/ Semi-Detached	Townhouses	Apartments
Alliston	93	20	20	133	70%	15%	15%	40%	59%	46%
Beeton	31	2	2	35	90%	5%	5%	13%	5%	4%
Tottenham	52	7	15	74	70%	10%	20%	22%	22%	34%
Briar Hill Development	37	5	7	49	75%	10%	15%	16%	14%	17%
Rest of Tecumseth	20	0	0	20	100%	0%	0%	8%	0%	0%
Total	233	34	44	311	75%	11%	14%	100%	100%	100%

Community	Total Units 2001-2021				Unit Distribution 2001-2021			Area Distribution 2001-2021		
	Single/ Semi-Detached	Townhouses	Apartments	Total	Singles/ Semi-Detached	Townhouses	Apartments	Singles/ Semi-Detached	Townhouses	Apartments
Alliston	1,857	405	405	2,667	70%	15%	15%	40%	59%	46%
Beeton	622	35	35	692	90%	5%	5%	13%	5%	4%
Tottenham	1,037	148	296	1,482	70%	10%	20%	22%	22%	34%
Briar Hill Development	741	99	148	988	75%	10%	15%	16%	14%	17%
Rest of Tecumseth	395	0	0	395	100%	0%	0%	8%	0%	0%
Total	4,653	687	884	6,224	75%	11%	14%	100%	100%	100%

TABLE 5-2b
TOWN OF NEW TECUMSETH
TOTAL HOUSING UNIT DISTRIBUTION BY COMMUNITY 2001-2031

Community	Average Annual Units 2001-2031				Unit Distribution 2001-2031			Area Distribution 2001-2031		
	Single/ Semi-Detached	Townhouses	Apartments	Total	Singles/ Semi-Detached	Townhouses	Apartments	Singles/ Semi-Detached	Townhouses	Apartments
Alliston	94	20	20	135	70%	15%	15%	40%	59%	46%
Beeton	31	2	2	35	90%	5%	5%	13%	5%	4%
Tottenham	52	7	15	75	70%	10%	20%	22%	22%	34%
Briar Hill Development	37	5	7	50	75%	10%	15%	16%	14%	17%
Rest of Tecumseth	20	0	0	20	100%	0%	0%	8%	0%	0%
Total	236	35	45	315	75%	11%	14%	100%	100%	100%

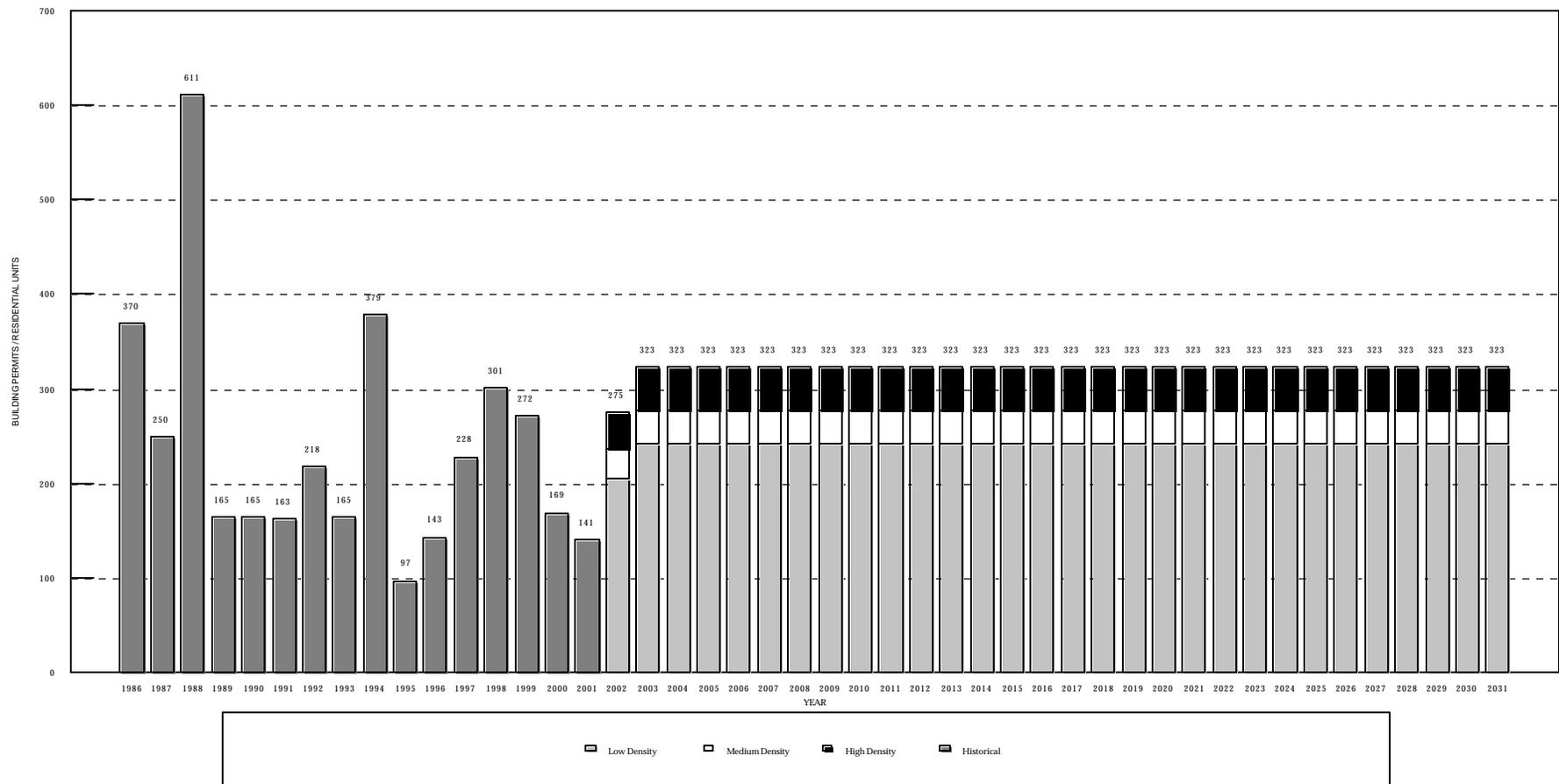
Community	Total Units 2001-2031				Unit Distribution 2001-2031			Area Distribution 2001-2031		
	Single/ Semi-Detached	Townhouses	Apartments	Total	Singles/ Semi-Detached	Townhouses	Apartments	Singles/ Semi-Detached	Townhouses	Apartments
Alliston	2,820	615	615	4,050	70%	15%	15%	40%	59%	46%
Beeton	945	52	52	1,050	90%	5%	5%	13%	5%	4%
Tottenham	1,575	225	450	2,250	70%	10%	20%	22%	22%	34%
Briar Hill Development	1,125	150	225	1,500	75%	10%	15%	16%	14%	17%
Rest of Tecumseth	600	0	0	600	100%	0%	0%	8%	0%	0%
Total	7,065	1,042	1,342	9,450	75%	11%	14%	100%	100%	100%

TABLE 5-3a
NEW TECUMSETH
RESIDENTIAL GROWTH FORECAST SUMMARY

Year	Population	Dwelling Units					Person Per Unit
		Single Family	Multiples	Apartments	Other	Total	
<i>Mid 1991</i>	20,420	5,575	470	740	45	6,830	-
<i>Mid 1996</i>	22,902	6,300	735	860	25	7,920	2.89
Mid 2001	25,849	7,209	869	929	25	9,032	2.86
<i>Mid 2006</i>	29,500	8,247	1,039	1,106	25	10,417	2.83
<i>Mid 2011</i>	33,933	9,453	1,216	1,335	25	12,029	2.82
<i>Mid 2016</i>	38,489	10,659	1,394	1,564	25	13,642	2.82
Mid 2021	42,976	11,865	1,572	1,793	25	15,255	2.82
<i>Mid 2026</i>	46,863	13,071	1,750	2,022	25	16,868	2.78
<i>Mid 2031</i>	51,030	14,277	1,928	2,251	25	18,481	2.76
1996-2001	2,947	909	134	69	0	1,112	-
2001-2006	3,652	1,038	170	177	0	1,385	-
2001-2011	8,084	2,244	347	406	0	2,997	-
2001-2016	12,640	3,450	525	635	0	4,610	-
2001-2021	17,127	4,656	703	864	0	6,223	-
2001-2026	21,015	5,862	881	1,093	0	7,836	-
2001-2031	25,182	7,068	1,059	1,322	0	9,449	-

Source: Forecast developed by C.N. Watson & Associates Ltd.

TABLE 5-3b
NEW TECUMSETH RESIDENTIAL UNIT FORECAST, 2001-2031



Source: Historical illustrates data from Statistics Canada 64-001. Forecast developed by C.N. Watson & Associates

5.4 Population-Based Forecast Approach

The population based forecast methodology was used as a verification or “test of reasonableness” of the primary forecasting methodology, the housing market approach, as described in Chapter 2. This population-based approach focuses on forecasting New Tecumseth’s potential long term population by estimating the Town’s share of larger market area population forecasts, as well as utilizing historical rates of growth within the Town, itself, to determine 20 and 30 year projections.

The **initial step** was to summarize available population forecasts for various segments of the larger market area, as follows.

- The Greater Toronto Area (GTA)
- Combined Peel and York Regions
- Simcoe County
- Greater Golden Horseshoe (GGH)¹

A summary of the results of these forecasts, sources and status is included in Appendix B.

The **second** step was to identify the housing market area which influences the future New Tecumseth housing market, and the segments of that market area for which recent population forecasts were available. These were as follows:

- Peel/York Regions
- County of Simcoe
- South Simcoe
- City of Barrie

¹ This area comprises the “outer ring” surrounding the GTA, including Niagara Region, Orangeville and South Simcoe. Prior to the phase-out of the Provincial Office of the Greater Toronto Area, the OGTA was compiling economic and population base data and preparing growth forecasts for this area (which includes New Tecumseth).

Table 5-4 sets out the population projections for the broader housing market segments in five year increments commencing in 2001 for these areas. In some cases, interpolations were required between 10 year forecast numbers to provide a five year forecast. In others, extrapolation of 2011-2021 trends was used to forecast the post 2021 figures.

The **third** step was to determine a basis to forecast the relationship of the New Tecumseth growth to the larger area growth. This was undertaken based on 1986, 1991 and 1996 Census populations for the Town and each of the four market area segments, as per Table 5-5. For instance, the Town population in 1986 was 16,854. The Peel/York Region population was 942,756. New Tecumseth population represented 1.79% of the Peel/York population in that year. Table 5-6 calculates the percentage relationships in each case. The average of the three years was used in developing the New Tecumseth forecasts. The three Census years were utilized as they represent a full range of economic conditions (boom and recession).

Table 5-6 includes a fifth scenario, the historical rate of growth (1986-1996) for the Town (average annual percentage compounded), as a comparison to the other approaches.

The **fourth** step was to generate alternative population scenario forecasts for the Town of New Tecumseth, based on the assumptions set out in Table 5-6. This has been undertaken in Table 5-7. Two additional alternatives were included—the current Town OP forecast and the recent (unpublished) MTO Town forecast. The base population (2001) population for the Town is estimated at 25,800 persons, and is used in each scenario.

These forecasts have been illustrated graphically in Figure 5-1 (to be included in the report in colour). The ranges of 2021 and 2031 forecasts using this population based approach is as follows:

	2021	2031
Current OP Forecast	42,300	n/a
Forecast Range	40,200-51,400	46,200-64,500
Forecast Midpoint	45,800	55,350

**TABLE 5-4
POPULATION PROJECTIONS FOR HOUSING MARKET AREA SEGMENTS
(2001-2031)**

Market Area Segment	2001	2006	2011	2,016	2021	2026	2031
Simcoe County (Ministry of Finance Forecast)	383,800	427,800	472,100	520,400	571,800	645,700	719,300
Peel and York Regions (Greater Toronto Coordinating Committee (GTCC) Forecast) 1	1,760,000	1,977,500	2,195,000	2,372,500	2,550,000	2,655,000	2,760,000
City of Barrie (Development Charges Background Study Forecast)	100,500	118,200	135,900	150,300	160,000	173,650	188,500
Barrie South Simcoe (Greater Golden Horseshoe (GGH), Office for the Greater Toronto Area (OGTA)) 2	202,880	242,380	281,880	321,380	360880	400,380	439,880

1. See Appendix E for Map of GTA
2. See Appendix E for Map of Barrie/South Simcoe Region

Sources: See Appendix B for all forecasts except Barrie

TABLE 5-5
HISTORICAL POPULATION GROWTH FOR MARKET AREAS SEGMENTS

	1986	1991	1996
Town of New Tecumseth	16,854	20,420	22,902
Simcoe County Population	238,408	288,684	329,865
Peel and York Region	942,756	1,237,779	1,444,971
City of Barrie	48,357	62,728	79,195

Source: 1986,1991 and 1996 Census

TABLE 5-6
BASIS FOR PROJECTED GROWTH RATES/SHARES FOR NEW TECUMSETH
CENSUS YEARS 1986-1996

Population Growth Scenario	1986	1991	1996	1986, 1991, 1996 Average
Historical New Tecumseth Annual (Compounded) Rate of Growth		3.91%	2.32%	3.11%
Town as a Percentage of County Population (Ministry of Finance Forecast)	7.07%	7.07%	6.94%	7.03%
Greater Toronto Coordinating Committee (GTCC) Population for Peel and York Region - Town as a Percentage of Combined Regions	1.79%	1.65%	1.58%	1.67%
Town as a Percentage of Barrie	34.85%	32.55%	28.92%	32.11%
*New Tecumseth Building Permits as a Percentage of South Simcoe Barrie Building Permits			13.93%	12.37%

*Note: Town share of Simcoe/Barrie Growth Forecast Based on 1991-2000 Building Permit share

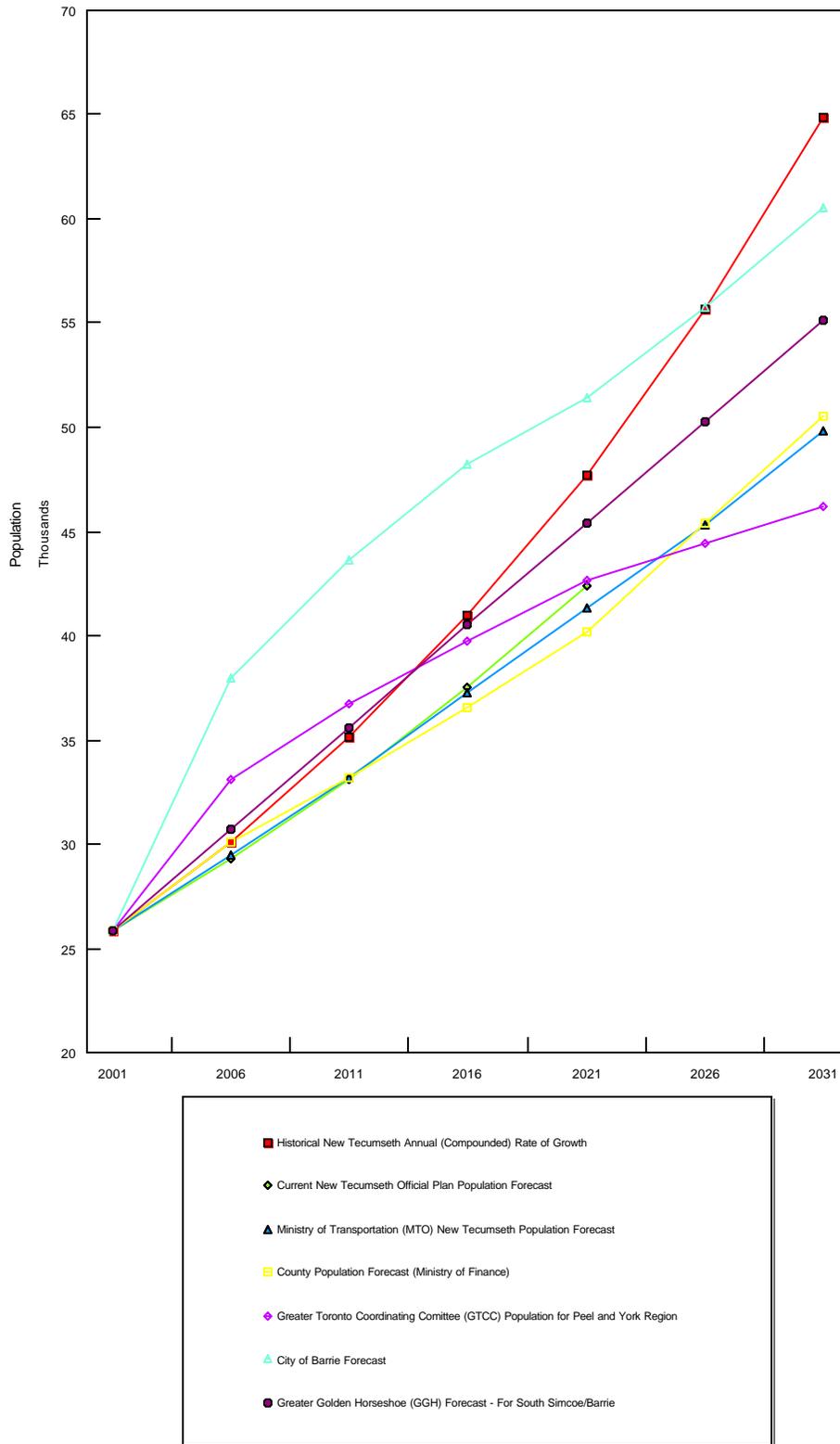
**TABLE 5-7
TOWN OF NEW TECUMSETH
LONG TERM POPULATION GROWTH FORECAST SCENARIOS
YEARS 2001-2031**

Number	Population Growth Scenario	Basis for Rate	2001	2006	2011	2016	2021	2026	2031
1	Current OP Forecast for New Tecumseth		25,850	29,285	33,130	37,485	42,400		
2	2001 Ministry of Transportation (MTO) New Tecumseth Population Forecast	MTO forecast for New Tecumseth (High- End Range)	25,850	29,450	33,200	37,250	41,300	45,350	49,800
3	Historical New Tecumseth Annual (Compounded) Rate of Growth	1986-1996 Average Annual Percentage Increase (3.11%)	25,850	30,132	35,124	40,944	47,728	55,637	64,856
5	County Population Forecast (Ministry of Finance, 2000)	1986-1996 Average Percentage of Population for Town (7.03%)	25,850	30,068	33,182	36,577	40,189	45,383	50,557
6	Greater Toronto Coordinating Committee (GTCC) Population for Peel and York Region ¹	1986-1996 Average Percentage of Population (1.67%)	25,850	33,106	36,747	39,719	42,690	44,448	46,206
7	City of Barrie Forecast	1986-1996 Average Percentage of Population (32.11%)	25,850	37,952	43,635	48,259	51,373	55,756	60,524
8	Greater Golden Horseshoe (GGH) Forecast - For South Simcoe/Barrie Building Permits ²	1996-1996 Town Housing Completions as a Percentage of South Simcoe/Barrie Building Permits (12.37%)	25,850	30,736	35,622	40,508	45,395	50,281	55,167

Notes:

1. Report to the Greater Toronto Coordinating Committee(GTCC), March 2000
2. Based on Population Projections provided by the Office for the Greater Toronto Area (OGTA), Ministry of Municipal Affairs and Housing. Building Permits provided by Statistics Canada Publication 64-001

**FIGURE 5-1
TOWN OF NEW TECUMSETH POPULATION GROWTH SCENARIOS 2001-2031**



5.5 New Tecumseth Population/Housing Unit Forecast Summary

Population forecasts for the Town of New Tecumseth were developed using two approaches. Section 5.3 utilizes a housing market approach. In order to test the reasonableness of these results, an alternative approach utilizing population forecasts for segments of the wider market area generated a second set of forecasts in Section 5.4. The results of the two approaches to the population forecast are compared below:

	2001	2021	2031	Population Increment	
				20 Year	30 Year
Housing Market Approach	25,800	42,900	51,100	17,100	25,300
Population Based Forecast					
Range	25,800	40,200-51,400	46,200-64,500	14,400-25,600	20,400-37,800
Midpoint		45,800	55,400	20,000	29,100

The population forecast generated by the housing market approach is well within the range generated by the second forecast methodology. The 2021 and 2031 Town population projections generated by the housing market approach are about 7% below the midpoint of the range generated by the alternate approach. However, the population-based forecast approach generates one forecast in each of 2021 and 2031 which is substantially higher than all of the others. In 2021, this is the Barrie-based forecast (51,378) and in 2031, continuation of the Town's historical rate of growth (64,850). Elimination of these two forecasts reduces the midpoint to 44,000 in 2021 and 53,400 in 2031. With the use of these adjusted mid-points, the difference with the market based forecast is in the range of 3%. Accordingly, the forecast results of the housing market approach are confirmed by this review process.

The recommended population and housing unit forecast for the Town of New Tecumseth is summarized in Table 5-8.

**TABLE 5-8
TOWN OF NEW TECUMSETH
POPULATION/HOUSING UNIT GROWTH FORECAST**

	Population	Housing Units
1996	22,902	7,920
2001	25,800	9,000
2006	29,600	10,500
2011	33,900	12,100
2016	38,500	13,700
2021	42,900	15,200
2026	46,800	16,900
2031	51,100	18,400

Source: See Table 5-3 (figures are rounded)

6. POPULATION/HOUSING UNIT FORECASTS BY COMMUNITY

6. POPULATION/HOUSING UNIT FORECASTS BY COMMUNITY

The population/housing unit forecast by community in the Town of New Tecumseth was a direct product of the input assumptions on growth rates by community, as described in Section 5.3. Given that the markets for the three urban communities differ, the overall (Town-wide) forecast was based on analyzing the market factors which affect each, and developing an average annual rate of housing unit productions for the four communities (plus remaining Tecumseth) separately.

The forecast population and housing units for Alliston, Beeton, Tottenham, the Briar Hill development and the remainder of Tecumseth is set out in Table 6-1 in five year increments from 2001 to 2031. The totals are consistent with the Town-wide totals on Table 5-8.

The growth increment by community is as follows:

	2001-2021		2001-2031		% of 2001-2031 total housing unit growth
	Population	Housing Units	Population	Housing Units	
Alliston	7,700	2,600	11,400	4,000	43
Beeton	2,200	700	3,200	1,100	12
Tottenham	4,200	1,500	6,300	2,300	24
Briar Hill	1,800	1,000	2,700	1,500	16
Rest of Tecumseth ¹	1,200	400	1,700	500	5
Total	17,100	6,200	25,300	9,400	100

Table 6-2 shows the distribution of growth on the basis of urban and rural areas. The latter area includes the Briar Hill development. This distribution is summarized below:

¹ The terms of reference called for a breakdown of growth by settlement area within the former Township of Tecumseth. However, information on vacant lot availability in the hamlets indicated virtually no supply. As well, there have been no development applications or growth trends. Accordingly, there is no evidence of a market for future hamlet growth.

	2001-2021		2001-2031		% of 2001-2031 total housing unit growth
	Population	Housing Units	Population	Housing Units	
Urban	14,100	4,800	20,900	7,400	79
Rural ¹	3,000	1,400	4,400	2,000	21
Total	17,100	6,200	25,300	9,400	100

¹ including Briar Hill development

TABLE 6-1
TOWN OF NEW TECUMSETH
FORECASTED POPULATION BY COMMUNITY, 2001 -2031

Community	YEAR						
	2001	2006	2011	2016	2021	2026	2031
Alliston	9,700	11,400	13,300	15,400	17,400	19,200	21,100
Beeton	3,400	3,900	4,400	5,000	5,600	6,000	6,600
Tottenham	5,000	5,900	7,000	8,100	9,200	10,200	11,300
Briar Hill Development	1,900	2,300	2,800	3,300	3,700	4,200	4,600
Rest of Tecumseth	5,800	6,100	6,400	6,700	7,000	7,200	7,500
Total	25,800	29,600	33,900	38,500	42,900	46,800	51,100

TOWN OF NEW TECUMSETH
FORECASTED HOUSING UNITS BY COMMUNITY, 2001 - 2031

Community	YEAR						
	2001	2006	2011	2016	2021	2026	2031
Alliston	3,300	3,900	4,600	5,200	5,900	6,600	7,300
Beeton	1,100	1,300	1,500	1,700	1,800	2,000	2,200
Tottenham	1,600	2,000	2,300	2,700	3,100	3,500	3,900
Briar Hill Development	900	1,100	1,400	1,700	1,900	2,200	2,400
Rest of Tecumseth	2,100	2,200	2,300	2,400	2,500	2,600	2,600
Total	9,000	10,500	12,100	13,700	15,200	16,900	18,400

Source: Developed by C.N. Watson and Associates Ltd.

TABLE 6-2
TOWN OF NEW TECUMSETH
FORECASTED URBAN/RURAL POPULATION, 2001 -2031

Community	YEAR						
	2001	2006	2011	2016	2021	2026	2031
Serviced Urban Area	18,100	21,200	24,700	28,500	32,200	35,400	39,000
Rural Area	7,700	8,400	9,200	10,000	10,700	11,400	12,100
Total	25,800	29,600	33,900	38,500	42,900	46,800	51,100

TOWN OF NEW TECUMSETH
FORECASTED URBAN/RURAL HOUSING UNITS, 2001-2031

Community	YEAR						
	2001	2006	2011	2016	2021	2026	2031
Serviced Urban Area	6,000	7,200	8,400	9,600	10,800	12,100	13,400
Rural Area	3,000	3,300	3,700	4,100	4,400	4,800	5,000
Total	9,000	10,500	12,100	13,700	15,200	16,900	18,400

Note: Rural Area includes Briar Hill Development

Source: Developed by C.N. Watson and Associates Ltd.

7. EMPLOYMENT FORECAST

7. EMPLOYMENT FORECAST

7.1 New Tecumseth Labour Force Profile (1996 Census)

The Town of New Tecumseth **labour force** comprised 11,350 **employed workers** according to the 1996 Census, the most recent information available. Of this total, 55% were male and 45% female, similar to the Ontario-wide figures of 54% and 46% respectively.

The **labour force participation rate** (persons over 15 years of age who are in the labour force relative to the total) was 70%, compared to the Provincial average of 66%. The **unemployment rate** for New Tecumseth resident workers in 1996 was 6.1%, compared to the Ontario average of 9.1%.

The share of the Town **labour force (11,895) who worked in agriculture and other resource-based industries** was 4% (480) in 1996, somewhat higher than the Province-wide average of 3%. In addition, a greater share of the New Tecumseth's resident labour force was employed in **manufacturing** (3,465) than the Province as a whole (29% vs. 22%). This would be expected with the Honda plant located in Alliston. The **service industry** (tertiary) labour force (7,950) represented a significantly lower share than the Provincial average (67% vs. 74%) due, in large part, to the absence of major office development in the general area.

7.2 New Tecumseth Employment Profile (1996 Census)

Based on 1996 census employment data for the Town of New Tecumseth, approximately 9,320 employed labour force (15 years and older) worked in New Tecumseth in 1996. Of this total, approximately 6% were employed in primary industrial employment, 48% were employed in industrial and other related employment, 31% were employed in population related or commercial employment, and 15% were employed in institutional employment (Table 7-1).

TABLE 7-1

EMPLOYMENT TO POPULATION RATIO BY MAJOR INDUSTRIAL TYPE, 1991 & 1996

NEW TECUMSETH

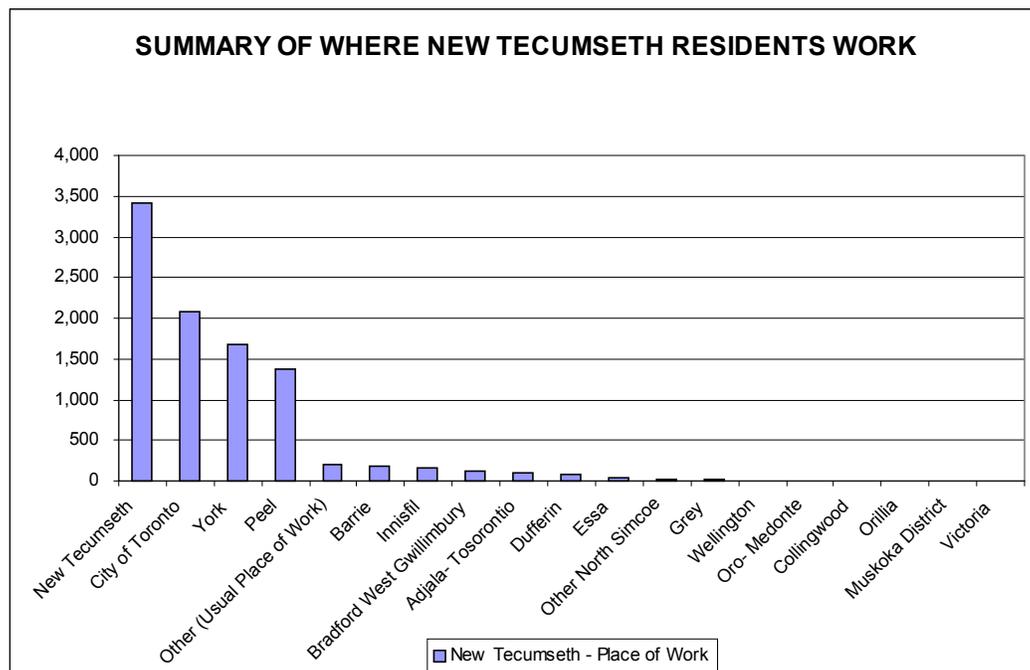
					Comments
		1991	1996	91-96	
Employment by industry					
1.0	<u>Primary Industry Employment</u>				Categories which relate to local land-based resources.
1.1	<i>All primary</i>	485	505	20	
Sub-total		485	505	20	
2.0	<u>Industrial and Other Employment</u>				Categories which relate primarily to industrial land supply and demand.
2.1	<i>Manufacturing</i>	1,625	3,430	1,805	
2.2	<i>Wholesale trade</i>	190	265	75	
2.3	<i>Construction</i>	255	485	230	
2.4	<i>Transportation, storage, communication and other utility</i>	215	295	80	
Sub-total		2,285	4,475	2,190	
3.0	<u>Population Related Employment</u>				Categories which relate primarily to population growth within the municipality.
3.1	<i>Retail trade</i>	555	1,095	540	
3.2	<i>Finance, insurance, real estate operator and insurance agent</i>	190	370	180	
3.3	<i>Business service</i>	210	285	75	
3.4	<i>Accommodation, food and beverage and other service</i>	515	1,165	650	
Sub-total		1,470	2,915	1,445	
4.0	<u>Institutional</u>				
4.1	<i>Government Service</i>	110	180	70	
4.2	<i>Education and Health Services</i>	650	1,245	595	
Sub-total		760	1,425	665	
Total Employment		5,000	9,320	4,320	
Population		20,239	22,902	2,663	
<u>Employment to Population Ratio</u>					
Industrial and Other Employment		0.11	0.20	0.09	
Population Related Employment		0.07	0.13	0.06	
Institutional Employment		0.04	0.06	0.02	
Primary Industry Employment		0.02	0.02	0.00	
Total		0.25	0.41	0.16	

Source: Statistics Canada

Overall, the Town of New Tecumseth experienced significant increases in total employment between the period of 1991 to 1996. More specifically, major employment sector including industrial, population related (commercial employment), and institutional employment all show substantial increases over this five-year period. What is most notable from the data is the Town's increase in manufacturing jobs, from 1,625 in 1991 to 3,430 in 1996 (+1,805) due largely to expansions at Honda. Based on discussions with Honda, Town staff and review of building permit statistics (Table D-1, Appendix D), employment growth trends for the industrial sector have continued throughout the 1996-2001 period. Increases in retail trade have also been significant from the 1991 to 1996 period increasing from 555 employees to 1,095 in 1996. Growth within this sector also appears strong for the 1996-2001 period, primarily due to a number of commercial development projects constructed in the western portion of Alliston over the past five years.

7.3 Town of New Tecumseth Commuting Patterns (1996 Census)

FIGURE 7-1a: NEW TECUMSETH EMPLOYMENT - PLACE OF WORK



Source: Statistics Canada, 1996

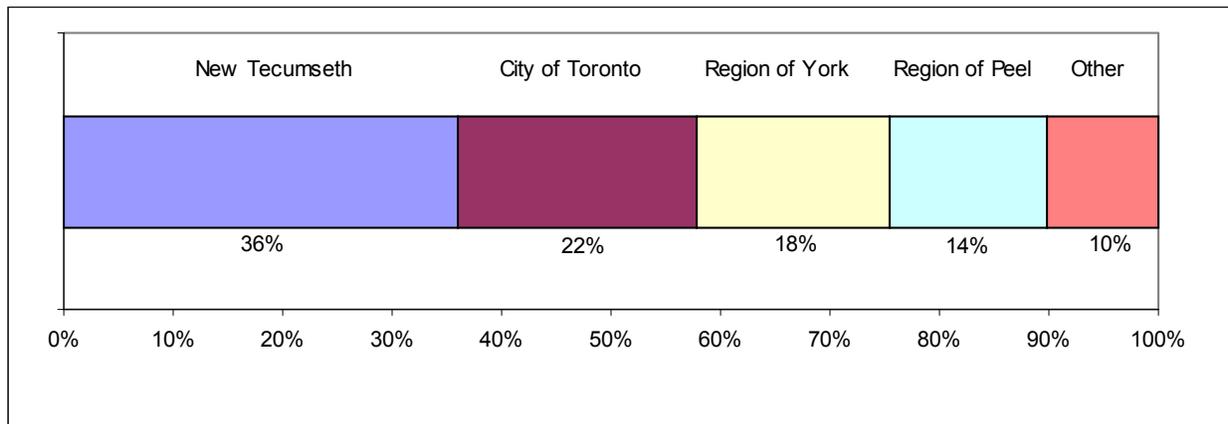
FIGURE 7-1b: PLACE OF WORK BY PERCENTAGE OF TOTAL EMPLOYMENT

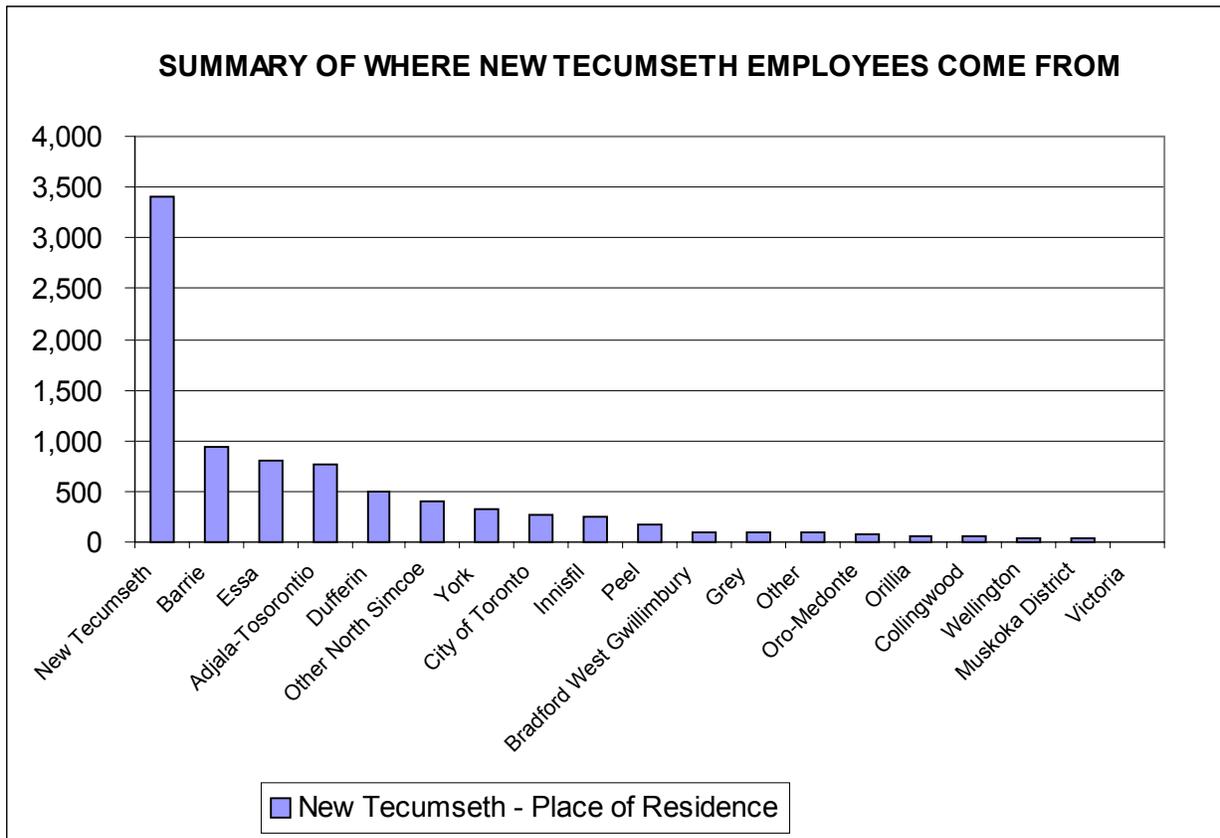
Figure 7-1a and 7-1b provide a breakdown of New Tecumseth employed residents by place of work. This summary includes all municipalities within Simcoe County as well as adjacent municipalities in the surrounding Regions/Countries. For the purposes of this exercise we have aggregated municipalities in North Simcoe County with 10 or less employees originating from New Tecumseth¹.

As indicated in the above figure, the GTA collectively makes up the largest employment destination for New Tecumseth residents, of which 2,075 (22%) work within the City of Toronto, 1,670 (18%) work within the Region of York, and 1,365 (14%) work within the Region of Peel. This is followed by 3,415 (36%) employed Town residents who work within New Tecumseth. An additional 615 (6%) of New Tecumseth residents work within the municipalities of Barrie and South Simcoe excluding New Tecumseth², while the municipal jurisdictions adjacent to Simcoe provide the remaining 4% of all employment destinations for New Tecumseth residents.

¹Other North Simcoe includes the municipalities of; Midland, Penetanguishene, Wasaga Beach, Clearview, Ramara, Severn, Springwater, Tay and Tiny.

² South Simcoe is comprised of New Tecumseth, Adjala-Tosorontio, Innisfil, Essa and Bradford-West Gwillimbury

FIGURE 7-2a: NEW TECUMSETH EMPLOYMENT – PLACE OF RESIDENCE



Source: Statistics Canada, 1996

FIGURE 7-2b: PLACE OF RESIDENCE BY PERCENTAGE OF TOTAL EMPLOYMENT

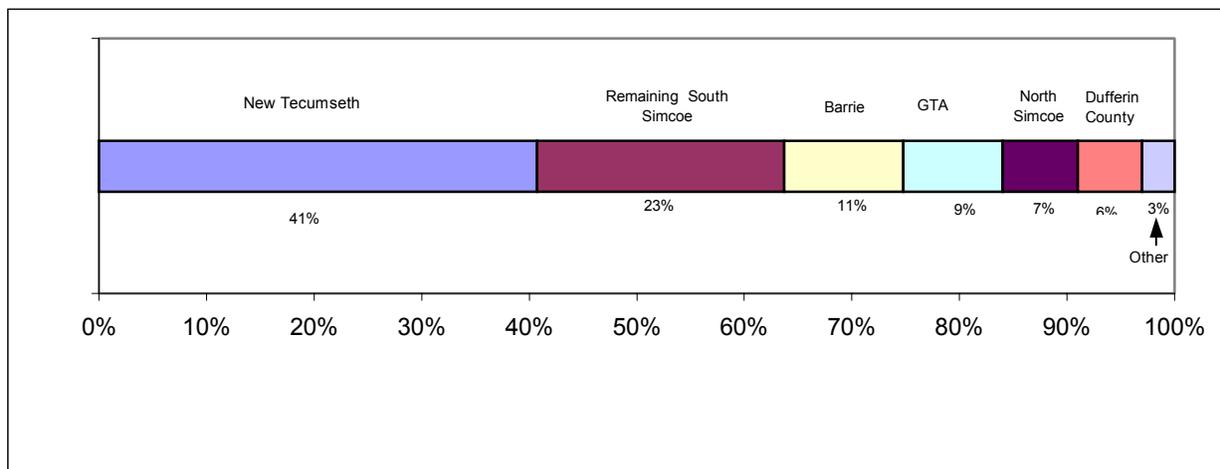


Figure 7-2a and 7-2b provide a summary of the “place of residence” of New Tecumseth employees. This figure indicates that the 3,415 (41%) of New Tecumseth employees live within New Tecumseth (consistent with Figure 7-1), while a total of 2,855 employees (34%) travel from within the municipalities of South Simcoe County and Barrie for employment in New Tecumseth. A total of 1,285 (16%) of New Tecumseth employees reside within North Simcoe County as well as other surrounding municipalities, while the remaining 9% of New Tecumseth employees commute to New Tecumseth from the Greater Toronto Area (GTA).

7.4 Town Business and Other Employment Establishment Inventory

The Nottawasaga Community Economic Development Corporation, of which New Tecumseth is a participant, is developing a database on employment establishments¹ and employment. Based on the most recent available information (Summer 2000), the total number of businesses (and other employment establishments) in the Town is 1,234, distributed² as follows:

	<u>No.</u>	<u>%</u>
Alliston	729	59.1
Beeton	193	15.6
<u>Tottenham</u>	<u>312</u>	<u>25.3</u>
Total	1,234	100.0

Business growth in New Tecumseth was significant over the past four to five years, reflecting the more buoyant economic conditions. An estimated 184 establishments³ opened since 1996, representing 15% of the 2000 inventory.

Table 7-2 shows the total Town business and other establishment inventory by employment ranges and communities. Of the 1,234 establishments, eleven (approximately 1% of the total establishments) employ more than 100 employees. The vast majority of the establishments are small with 810 establishments (66%) employing less than 10 workers.⁴

¹ The definition of employment establishments in this inventory is broad, and includes institutions such as the hospital, schools and the Town.

² Businesses in the former Township are included in the data for the nearest urban community

³ Some firms did not indicate year of establishment, therefore, the number could be higher.

⁴ 297 firms did not provide data

In the middle range, 13 establishments employed between 50 and 99 employees, 38 establishments between 20 and 40 employees and 65 establishments between 10 and 19 employees. In total, these accounted for 9% of the total establishments.

TABLE 7-2
TOWN OF NEW TECUMSETH
TOTAL BUSINESSES BY NUMBER OF EMPLOYEES

Employees	Alliston	Beeton	Tottenham	Total
1000-4999	1	0	0	1
500-999	0	0	1	1
250-499	3	0	1	4
100-249	5	0	0	5
50-99	9	3	1	13
20-49	19	5	14	38
10-19	46	6	13	65
5-9	80	21	25	126
1-4	394	106	184	684
Unknown	172	52	73	297
TOTAL	729	193	312	1,234

Source: Nottawasaga Community Economic Development Corporation, 2001

7.5 The Town's Major Employers by Community

Based on data generated from the Nottawasaga Community Economic Development Corporation employment database, New Tecumseth's major industries (in terms of number of employees and floor area) were identified by community¹ (Table 7-3, Table D-2 Appendix D).

Within Alliston, a total of 17 employment establishments exist with 50 employees or more, of which over 9 of these firms are estimated to have 100 employees or more. The largest employment establishment in both Alliston and New Tecumseth as a whole, is Honda of Canada with an estimated 4,000 employees, followed by Warren Gibson Ltd., Nottawasaga Inn,

¹ It should be noted that the employment data was not provided by all firms surveyed and was included in the database in ranges. As well, job numbers include full, part-time and casual employment.

and Baxter Corporation, all of which are estimated to have a range between 250-499 employees.

The community of Tottenham has 16 employment establishments with 20 or more employees, of which three have more than 50 employees. These include: F & P Manufacturing Inc. with an employment estimate of 500-999, Ventra Group Inc., Seeburn Division which has an employment range of 250-499, and PMC Film Inc, which has an employment estimate of 50-99.

Within the community of Beeton, there are no large employment establishments with an estimated number of employees greater than 100, however, a significant number (13 in total) of small to mid-size (10 to 99 employees) currently exist. The larger of these employers include Simcoe Manor (Home for the Aged), Nottawasaga Police Services/Essa, New Tecumseth District, and Borden Metal Products (Canada) Ltd.

**TABLE 7-3
LARGEST COMPANIES IN NEW TECUMSETH BY NUMBER OF
EMPLOYEES**

Alliston

Ranking	Employer	Number of Employees
1	Honda of Canada Mfg.	1000 - 4999
2	Warren Gibson Ltd.	250 - 499
3	Nottawasaga Inn	250 - 499
4	Baxter Corporation	250 - 499
5	Ontario Potato Distributing (Alliston) Inc.1991/OPDI Logistics	100 - 249
6	Oetiker Limited/Hanso Technologies Ltd.	100 - 249
7	Nissin Transport (Canada) Inc.	100 - 249
8	IGA, Alliston	100 - 249
9	Zehr's Grocery Store	100 - 249
10	Banting Memorial High School	100 - 249
11	Trailwood Transport Ltd.	50 - 99
12	Town of New Tecumseth/Parks, Recreation & Culture	50 - 99
13	Stevenson Memorial Hospital	50 - 99
14	Premier Manufacturing Support Services of Canada	50 - 99
15	Peter Thompson & Sons Inc.	50 - 99
16	Howard Noble Insurance Limited-Alliston Branch	50 - 99
17	Good Samaritan Nursing Home	50 - 99
18	CLASS, Community Living Association-South Simcoe	50 - 99

Beeton

Ranking	Employer	Number of Employees
1	Simcoe Manor (Home For The Aged)	50 - 99
2	Nottawasaga Police Services/Essa, New Tecumseth District	50 - 99
3	Borden Metal Products (Canada) Ltd.	50 - 99
4	W. D. Potato Ltd.	20 - 49
5	Tecumseth Beeton Central Public School	20 - 49
6	Impact Security Service	20 - 49
7	IGA, R.C. Jackson Foods Ltd./LCBO	20 - 49
8	Simcoe York Printing & Publishing/Beeton Record Sentinel	10 - 19
9	Prototier-1 Inc.	10 - 19
10	Muddy Water Tavern	10 - 19
11	Isabella's Country Cuisine	10 - 19
12	Deckers Electric Inc.	10 - 19
13	Beeton Dental Office	10 - 19

Tottenham

Ranking	Employer	Number of Employees
1	F & P Manufacturing Inc.	500 - 999
2	Ventra Group Inc.,Seeburn Division	250 - 499
3	PMC Film Canada Inc.	50 - 99
4	Tottenham Public School	20 - 49
5	Tottenham Montessori School	20 - 49
6	Tottenham Medical Centre	20 - 49
7	Tim Hortons	20 - 49
8	Tecumseth South Central	20 - 49
9	St. Thomas Aquinas School	20 - 49
10	St. James Roman Catholic School	20 - 49
11	Prudential Lorimer Realty Ltd.	20 - 49
13	Motokov Canada Inc.	20 - 49
14	IGA Tottenham	20 - 49
15	Hawman Container Services	20 - 49
16	Father O'Reilly School	20 - 49
17	Carrier Connection International/Slip-on Spikes Inc.	20 - 49

Source: Nottawasaga Community Economic Development Corporation, 2001

7.6 Profile of New Tecumseth Employment Establishments by Type

Based on data generated from the Nottawasaga Community Economic Development Corporation employment database, a profile of New Tecumseth's employment establishments was generated. Within the database a total to 951 companies have been classified according to the Standard Industrial Classification (SIC). The results of the database indicate that New Tecumseth's employment establishments are dominated by those related to retail and wholesale trade (36%), manufacturing (19%), finance and insurance agencies (16%), government services (10%), as well as health and social services (8%). The remaining 11% of New Tecumseth's industry profile is largely made up of commercial services such as, real estate operator and insurance agent industries, business services, as well as accommodation/food and beverage services. Additional industrial sectors such as construction, transportation and storage, and communication and other utility industries make up a very minor portion of the remaining industry profile.

TABLE 7-4
TOTAL COMPANIES BY STANDARD INDUSTRIAL CLASSIFICATION (SIC)
TOWN-WIDE TOTAL

Industry Classification	Total Number of Firms	Percentage
Manufacturing	176	18.5%
Construction	25	2.6%
Transportation and Storage	7	0.7%
Communication and Other Utility	3	0.3%
Wholesale & Retail Trade	348	36.6%
Finance and Insurance	156	16.4%
Real Estate Operator and Insurance Agent Industries	42	4.4%
Business Service	16	1.7%
Government Service	93	9.8%
Education Service	0	0.0%
Health and Social Service	77	8.1%
Accommodation, Food and Beverage Service Industries	8	0.8%
Other Service Industries	0	0.0%
	951	100.0%

Source: Nottawasaga Community Economic Development Corporation, 2001

7.7 Employment Forecast

1996 employment data (place of work) data for the Town of New Tecumseth is outlined in Section 7.2. This data was used to generate activity rates (jobs per resident) by industry for the Town (Table 7-5). From 1991 to 1996, the activity rate for industrial employment increased significantly, with a growth rate of 97% (from 0.095 to 0.187), while population related employment (commercial) also showed strong gains, with growth rate of 77% over the same five-year period (1991-1996). Based on the results generated from the Nottawasaga Economic Development Corporation Database, a review of recent non-residential developments (Table D-4, Appendix D) and discussions with Town staff and Honda, it has been estimated that the activity rate for the above-mentioned sectors has continued to increase over the 1996-2001 period, however, at a somewhat slower rate. In addition, the activity rate for institutional which has shown moderate gains from the 1991-1996 period, is estimated to level off by the year 2001. Lastly, the activity rate for primary industry has shown a minor increase over the 1991-1996 period, but is anticipated to decline slightly by the year 2001.

Based on the above referenced information, as well as anticipated Provincial and GTA economic trends, future employment activity rates were generated by sector. The forecast indicates that activity rates for primary and institutional industry will decline slightly over the twenty-year forecast period as population increases. The industrial activity rate is also anticipated to gradually decline after the year 2001 over the twenty-year forecast period to the year 2021. Lastly, the population related activity rate is forecasted to decline slightly over the projection period, while the work at home activity rate is anticipated to gradually increase.

Based on the above assumptions regarding forecasted activity rates as well as population projections outlined in section 5.0, it is estimated that by the year 2021, total employment for the Town will increase by approximately 9,200 from its current 2001 level (13,150), to an estimated 2021 total employment forecast of 22,300 (Table 7-6). Employment growth for the Town is estimated at 49% industrial, 31% commercial, 13% work at home and 7% institutional. Assuming an average of 74, 28, and 74 s.m. per employee respectively for industrial, commercial, and institutional employment, it has been estimated that a total of approximately 460,200 additional s.m. of gross floor area will be required by the year 2021 (Table D-3, Appendix D). Total additional floor area would be comprised of approximately 73% industrial, 17% commercial, and 10% institutional.

TABLE 7-5

**NEW TECUMSETH
NON-RESIDENTIAL
PROJECTION**

	Pop'n	Activity Rate						Employment						Square Metres (ESTIMATED) ¹			
		Primary	Work at Home	Industrial	Pop'n Related	Institutional	Total	Primary	Work at Home	Industrial	Pop'n Related	Institutional	Total	Industrial	Commercial	Institutional	Total
1991	20,420	0.009	0.044	0.095	0.064	0.034	0.245	175	895	1,940	1,300	690	5,000				
1996	22,902	0.011	0.039	0.187	0.113	0.057	0.407	255	895	4,290	2,580	1,300	9,320				
2001	25,849	0.010	0.041	0.243	0.158	0.057	0.509	255	1,062	6,289	4,075	1,467	13,148	467,391	113,619	109,067	690,078
2006	29,500	0.009	0.044	0.233	0.156	0.055	0.496	255	1,300	7,983	5,092	1,615	16,245	593,274	141,955	120,030	855,258
2011	33,933	0.008	0.047	0.230	0.154	0.053	0.491	255	1,598	8,915	5,714	1,790	18,272	662,579	159,234	133,036	954,849
2016	38,489	0.007	0.050	0.225	0.152	0.051	0.484	255	1,927	9,772	6,337	1,953	20,244	726,310	176,607	145,113	1,048,030
2021	42,976	0.006	0.053	0.225	0.150	0.049	0.483	255	2,281	10,783	6,932	2,095	22,346	801,375	193,237	155,704	1,150,316
Incremental Change																	
1991-1996	2,482	0.032	0.000	0.947	0.516	0.246	1.741	80	0	2,350	1,280	610	4,320				
1996-2001	2,947	0.000	0.057	0.678	0.507	0.057	1.299	0	167	1,999	1,495	167	3,828				
2001-2006	3,652	0.000	0.065	0.464	0.279	0.041	0.848	0	238	1,694	1,017	148	3,097	125,883	28,335	10,962	165,180
2001-2011	8,084	0.000	0.066	0.325	0.203	0.040	0.634	0	536	2,626	1,639	323	5,124	195,188	45,615	23,969	264,771
2001-2016	12,640	0.000	0.068	0.276	0.179	0.038	0.561	0	865	3,483	2,262	486	7,096	258,919	62,988	36,046	357,952
2001-2021	17,127	0.000	0.071	0.262	0.167	0.037	0.537	0	1,219	4,494	2,857	628	9,198	333,984	79,617	46,637	460,238
Annual Average																	
1991-1996	496	0.032	0.000	0.947	0.516	0.246	1.741	16	0	470	256	122	864				
1996-2001	589	0.000	0.057	0.678	0.507	0.057	1.299	0	33	400	299	33	766				
2001-2006	730	0.000	0.065	0.464	0.279	0.041	0.848	0	48	339	203	30	619	25,177	5,667	2,192	33,036
2001-2011	808	0.000	0.066	0.325	0.203	0.040	0.634	0	54	263	164	32	512	19,519	4,562	2,397	26,477
2001-2016	843	0.000	0.068	0.276	0.179	0.038	0.561	0	58	232	151	32	473	17,261	4,199	2,403	23,863
2001-2021	856	0.000	0.071	0.262	0.167	0.037	0.537	0	61	225	143	31	460	16,699	3,981	2,332	23,012

¹ Sq.M. Per Employee Assumptions

- Industrial 74
- Commercial 28
- Institutional 74

**TABLE 7-6
TOWN OF NEW TECUMSETH
EMPLOYMENT FORECAST 2001-2021**

Year	Primary	Work at Home	Industrial	Population Related	Institutional	Total
2001	260	1,060	6,290	4,080	1,470	13,150
2006	260	1,300	7,980	5,090	1,620	16,250
2011	260	1,600	8,920	5,710	1,790	18,270
2016	260	1,930	9,770	6,340	1,950	20,240
2021	260	2,280	10,780	6,930	2,100	22,350

Figures are rounded

**TABLE 7-6
TOWN OF NEW TECUMSETH
INCREMENTAL CHANGE IN EMPLOYMENT 2001 -2021**

Year	Primary	Work at Home	Industrial	Population Related	Institutional	Total
1996-2001	0	170	2,000	1,500	170	3,830
2001-2006	0	240	1,690	1,020	150	3,100
2001- 2011	0	540	2,630	1,640	320	5,120
2001-2016	0	870	3,480	2,260	490	7,100
2001-2021	0	1,220	4,490	2,860	630	9,200

Source: Employment Forecast Generated by C.N Watson and Associates

8. LAND NEEDS

8.0 LAND NEEDS

This section of the report discusses the land area requirements for the housing and employment growth that was projected in the previous sections.

8.1 Review of Official Plan Policy Context

The population/housing unit projections have been prepared on the basis of the housing market model approach, as confirmed by comparison with other long term forecasts. The employment forecast was based on the population forecast.

The Official Plan policies (November 1999 Consolidation) provide guidance for the allocation of such growth.

Specifically, Section 3.3, “Guiding Principles” contains the Town’s mission statement, together with a set of guiding principles that together reflect the general aspirations of the community and form the basis upon which the goal, objectives and policies of the plan are formulated. With regard to population and employment growth objectives, the following guiding principles should be noted:

- To preserve and enhance the unique rural and small town character of the community, while accommodating controlled growth so that the Municipality can sustain and develop the services the community needs.
- To develop a healthy diversified local economy so that the community provides local employment opportunities, a balanced tax base, healthy downtown cores, and strong existing commercial development (p. 3-3).

In addition, Section 3.4, “The Vision” notes the following:

“Three primary urban settlement areas currently exist. These communities are Alliston, Beeton and Tottenham.

- *Alliston is to serve as the primary industrial core of the Town. All new major industrial developments are to be located in Alliston.*
- *Beeton will serve as a residential community complemented by local commercial developments with few industrial uses.*
- *Tottenham will serve as a predominantly residential community, but will also function as a secondary commercial and industrial centre in the Town. New industrial development in Tottenham is to be confined to the industrially designated lands on the west side of the community.*

It is the goal of the Town that all three urban areas continue to be developed as communities with commercial, social, recreational, cultural and business services

which are appropriate to the number of residents living within their service area (p. 3-4.).

Section 4.0 contains general development policies. Economic issues are addressed in section 4.1 where the following points are noted:

- *In order to develop a diverse and sufficient economic base, positive actions will be taken to preserve and extend the Town's industrial base.*
- *Equally important is action to strengthen the downtown cores and to maintain their primacy in the commercial hierarchy.*

The Official Plan goes on to outline the following specific Objectives of the Town:

- a) *To encourage the diversification and expansion of the Municipality's industrial/commercial base including tourism;*
- b) *To achieve a balance within the community between housing and employment opportunities so as to provide the option of a local workplace for the residents of the community;*
- c) *To maintain and enhance the existing downtown cores as the prime commercial centres for the Municipality;*
- d) *To foster and encourage the maintenance of a viable agricultural industry as an important component of the Municipality's economic base; and*
- e) *To encourage economic opportunities in appropriate areas, including home occupations (pp. 4-1, 4-2).*

8.2 Residential Population/Housing Land Requirements

In Section 5 of this report, the population of New Tecumseth was projected to be 42,900 by 2021. This compares closely with the projection of 42,400 in the Town's current Official Plan (as amended in 1999 by Official Plan Amendment 21). Consequently, the projections contained in this forecast are in line with the projections contained in the Town's current Official Plan (Consolidated November 1999).

8.2.1 Town of New Tecumseth as a Whole

In Section 6 of this report, housing unit projections were determined for the Town and for each urban settlement area. Table 8-1 summarizes those projections and shows that overall, a total of approximately **6,200** new housing units is

TABLE 8-1
Town of New Tecumseth
Housing Unit Projections to 2021 versus Units in the Development Process (Proposed)

	Low Density (1)		Medium Density (2)		High Density (3)		Totals	
	No. of Units	Percent	No. of Units	Percent	No. of Units	Percent	Totals	Percent
ALLISTON 2001 - 2021								
Projected to 2021	1,857	70%	405	15%	405	15%	2,667	100%
Currently Proposed	2,062	60%	648	19%	730	21%	3,440	100%
Vacant Lands	216	63%	128	37%	-	0%	344	100%
Total Potential	2,278	60%	776	21%	730	19%	3,784	100%
BEETON 2001 - 2021								
Projected to 2021	622	90%	35	5%	35	5%	692	100%
Currently Proposed	113	100%	-	0%	-	0%	113	100%
Vacant Lands	-		-		-		-	
TOTTENHAM 2001 - 2021								
Projected to 2021	1,037	70%	148	10%	296	20%	1,481	100%
Currently Proposed	1,249	66%	204	11%	430	23%	1,883	100%
Vacant Lands	-		-		-		-	
BRIAR HILL 2001 - 2021								
Projected to 2021	741	75%	99	10%	148	15%	988	100%
Currently Proposed	1,048	61%	300	17%	380	22%	1,728	100%
Vacant Lands	-		-		-		-	
TECUMSETH 2001 - 2021								
Projected to 2021	395	100%	-	0%	-	0%	395	100%
Proposed	61	100%	-	0%	-	0%	61	100%
Vacant Lands	-		-		-		-	
TOWN TOTALS								
Projected to 2021	4,652	75%	687	11%	884	14%	6,223	100%
Currently Proposed	4,533	63%	1,152	16%	1,540	21%	7,225	100%
Vacant Land Potential	216	63%	128	37%	-	0%	344	100%
Proposed + Vacant	4,749	63%	1,280	17%	1,540	20%	7,569	100%

Notes:

- (1) Low density residential units include detached and semi-detached residential dwelling units.
- (2) Medium density residential units include townhouse units.
- (3) High density residential units include apartment units.

projected for the Town of New Tecumseth for the 2001 to 2021 period.

For proper market functioning, a 2-year supply of units is included as an over-supply allowance. This amounts to 620 units and together with the projection of 6,200, totals **6,820 units**. This is taken to be the total number of residential units that will be needed to satisfy demand over the 2001-2021 period.

Currently, there are approximately **7,225** housing units proposed in the Town¹. When the potential unit yield for vacant designated lands² is included, the total future potential supply increases to approximately **7,500** units. Thus, total future potential supply is adequate to satisfy total projected need over the 2001-2021 period.

Furthermore, Table 8-1 shows that there are adequate numbers of units proposed in each of the residential density categories to satisfy projected demand.

In sum, for the Town as a whole, there is a more than adequate supply of future potential housing units, either already in the development approvals process or permitted on designated lands.

On a community basis, there are some variations between “projected units” and “proposed/future supply”. The following section reviews the projected need vis-à-vis proposed/potential supply for the urban settlement areas of Alliston, Beeton, Tottenham, and Briar Hill as well as the rural area of Tecumseth.

8.2.2 Alliston

In the community of Alliston, an increase of approximately **2,600** residential units has been projected for the 2001 – 2021 period. Adding in an appropriate over-supply allowance of 260 units (based on a two-year supply of the 20-year projection), generates a total of **2,860 units** to meet projected need.

This compares with over **3,400** units currently in the development approvals process for Alliston (on lands designated for residential development). In addition there is the potential for approximately **216 low density** units and **128 medium density** units on vacant, residentially designated lands. Overall, there is a total future potential supply of approximately **3,780 units** in Alliston, which is adequate to accommodate the projected growth.

Moreover, as shown in Table 8-1, there are sufficient numbers of units proposed in each density category to satisfy projected need.

¹ Proposed units include the following: (i) units that are registered but not built; (ii) units on Draft Approved plans; (iii) units on plans that have been referred to the Ontario Municipal Board; and (iv) units on plans that have been submitted to the Town but have not yet received draft approval.

² These are lands for which no subdivision applications have been submitted.

In summary, Alliston has adequate lands designated to accommodate projected population and housing growth and to allow for a reasonable level of over-supply, which is needed for the housing market to function properly. Therefore, no additional lands need to be designated for residential use in Alliston.

8.2.3 Beeton

A total of close to 700 new residential units is projected for Beeton over the 2001 - 2021 period.

Currently, there are only 113 units of future potential supply in Beeton (refer to Table 8-1).

If all of the projected 700 units are to be realized in Beeton, additional lands will need to be designated for residential use. This may be accomplished by re-designating lands currently designated for some other use, industrial, for example, or by expanding Beeton's current urban settlement area boundaries.

To accommodate the remaining 587 residential units (700 less the 113 units that are currently proposed), which are comprised of approximately 517 single detached/semi-detached; 35 townhouses; and 35 apartments, a total of approximately **31 hectares** of land is needed, calculated as follows:

- 517 single detached/semi detached
 - Assume 24 units per net hectare³ = 21.5 hectares (net)
 - plus 25% for roads, parks, SWM, utilities = 26.9 hectares (excluding schools)
 - plus an over-supply allowance of 2 years = 26.9 hectares ÷ 20 years = 1.325 hectares/year x 2 years = 2.69 hectares
 - for a total of **29.59 hectares**

- 35 townhouse units
 - Assume 40 units per net hectare⁴ = 0.88 ha (net)
 - plus 25% for roads, parks, SWM, utilities = 1.1 ha
 - plus an over-supply allowance of 2 years = 1.1 ha ÷ 20 years = 0.055 ha/year x 2 years = 0.11 ha
 - for a total of **1.21 hectares**

- 35 apartment units
 - Assume 75 units per net hectare⁵ = 0.47 hectare (net)
 - plus 10% for roads, parks, SWM, utilities = 0.52 hectare

³ Per Section 7.9.2 (c)(i) of the Official Plan.

⁴ Per Section 7.9.2 (c) (ii) of the Official Plan

⁵ Per Section 7.9.2 (c) (iii) of the Official Plan.

- plus an over-supply allowance of 2 years = 0.52 hectare ÷ 20 years = 0.026 hectare/year x 2 years = 0.052 hectare
- for a total of **0.572 hectare**

Currently, there is insufficient land within the boundaries of the urban settlement area of Beeton to accommodate the projected growth. If the growth projected for Beeton is to be fully captured by the Town of New Tecumseth, approximately 31 hectares of additional lands should be designated for residential development in Beeton. If the Town does not adequately provide for the growth projected for Beeton, some of that growth will be accommodated in similar communities in other municipalities.

8.2.4 Tottenham

Almost **1,500** new housing units are projected for Tottenham over the 2001 to 2021 period. The projections include 70% low density, 10% medium density and 20% high density (refer to Table 8-1).

Again, in order for the market to function effectively, an over-supply allowance of 2 years is added to the projection, calculated as follows: 1,500 units ÷ 20 years = 75 units/year x 2 years = 150 units, for a **total projected need of 1,650 units**.

Currently, there are over **1,800** units in the development approvals process for Tottenham, and as such projected need can be accommodated. In addition, there are sufficient numbers of units proposed in each of the density categories (low, medium and high) to satisfy projected need.

Therefore, it is concluded that no additional lands need to be designated in Tottenham to accommodate projected housing unit growth over the 2001-2021 period.

8.2.5 Briar Hill

Close to **1,000 new units** are projected for Briar Hill over the 2001 to 2021 period. This includes approximately 750 singles, 100 multiples (excluding apartments) and 150 apartment units.

If a 2-year over-supply allowance is included, the total projected number of units for the 2001 to 2021 period increases to **1,100 units**.

This compares with **1,725 units** that are currently in the development approvals process for Briar Hill, of which 1,045 are singles, 300 multiples (excluding apartments), 380 apartments. It is noted that all 1,725 units are within registered plans of subdivision, to be developed in phases by plan of condominium.

To conclude, for the Briar Hill community there is a sufficient number of units contained in registered plans of subdivision that will accommodate all of the projected growth over the 2001 to 2021 period.

8.2.6 “Rural” Tecumseth

The Official Plan policies direct the majority of growth to the three designated urban settlement areas of Alliston, Beeton and Tottenham. As such, significant residential growth in the rural areas is not anticipated.

The housing unit forecast for “Rural Tecumseth” includes 20 residential units per year over the 2001 to 2021 period, for a total of 400 units. Such housing units may be provided in the rural areas on existing lots of record or by way of severance, in accordance with the Town’s severance policies (Section 9.4 of the Official Plan).

It is noted that there are four designated Hamlets in the Town: Thompsonville, Penville, Rich Hill and Colgan. Each of these communities has very limited, if any, infilling opportunities. However, where possible, infilling in the Hamlets should be encouraged to meet the demand for lots in the rural area.

8.2.7 Summary: Residential Land Requirements

Overall, a total of approximately **6,200 housing units** are projected for the Town of New Tecumseth over the 2001 to 2021 period. Incorporating an over-supply allowance brings the total unit count to 6,820.

This compares with 7,225 units that are currently in the development approvals process, and an additional potential for 275 units on vacant land designated for residential use.

In all, there is currently a total of **7,500** dwelling units in the development approvals process or potentially developable on vacant designated lands in the Town of New Tecumseth, compared to a projected need for **6,820** new housing units over the 2001 to 2021 period.

Projected housing unit growth for the 2001-2021 period can be accommodated by the units that are currently in the development approvals process (i.e., units that are either registered but not built, Draft Approved, referred to the OMB, or future proposed, i.e., submitted but not yet draft approved) or on lands that are vacant and designated for residential development.

The analysis of potential supply also shows that there are sufficient numbers of units to meet projected need in each of the three density categories. Furthermore, projected housing need can be met in each of the communities, except in Beeton, where additional lands will need to be designated for residential use.

8.3 Employment Land Needs

This section of the report discusses the land requirements for the employment projections and the non-residential employment building space requirements that were presented in Section 7.

8.3.1 Employment Space Requirements

Table 7-5 provides projected employment and resulting building space needs for the Town over the 2001 to 2021 period.

The projections show that by 2021, the Town will need an additional 460,000 square metres of space to accommodate projected growth in employment.

The 460,000 square metres is distributed as follows:

Projected Employment Space Requirements Town of New Tecumseth, 2001 - 2021		
	Square Metres	Percent
Industrial	334,000	73%
Commercial	80,000	17%
Institutional	47,000	10%
Total	461,000	100%

Source: Table 7-5

8.3.2 Calculation of Land Area Requirements – “Givens” and Assumptions

Land area requirements have been calculated with consideration for the following “givens” and assumptions:

- i) Industrial, commercial and institutional developments rarely achieve the maximum coverage allowed by the zoning by-law. Coverage assumptions of 30%, 30% and 25%, respectively are deemed appropriate and reflective of “actuals”.
- ii) A factor of 25% of “Net Land Area” for industrial lands and 10% of “Net Land Area” for commercial and institutional lands is allowed for such public uses as local and collector roads, road widenings, stormwater management facilities, utilities, parks, and environmental protection lands.
- iii) In determining industrial land needs a “choice” factor equivalent to a 5-year supply of gross land area requirements and a “vacancy” factor equivalent to a 3-year supply of gross land area requirements is incorporated for proper market functioning.

- iv) In determining commercial land needs, the choice and vacancy factors are lower - 2 years and 1 year of gross land needs, respectively. These factors are considered appropriate to ensure proper commercial market functioning.
- v) Institutional lands do not require vacancy and choice allowances, as the demand for such lands is not primarily driven by market forces.

8.3.3 Industrial Land Need Calculations

Table 7-5 shows that an additional **334,000 square metres** of industrial employment building space will be needed to accommodate projected growth in employment over the 2001-2021 period. This is equivalent to **33.4 hectares** of building space.

A reasonable and realistic coverage assumption of 30% is applied to yield a “net land area” of **111.33 hectares** ($33.4 \text{ ha} \div 0.30$).

In addition to accommodating the building on the site, the following additional local services must be accommodated in new industrial areas: parking, local roads, stormwater management facilities, utilities, parks, walkways. Given the fact that a significant amount of new industrial development is expected to occur in a new planned block area, collector roads will be required. In addition, an allowance for environmental protection lands should be provided. Consequently, the “net land area”, is increased by a factor of **25%** to allow for these additional uses. Thus, the land requirement increases to **139.17 hectares** (111.33×1.25). This is the gross land area requirement.

In order for the industrial land market to function properly, a five-year supply of land should be available at any given point in time. This allows for a necessary degree of “**choice**” in the industrial land marketplace. The gross land area requirement of 139.16 hectares, represents a 20-year requirement. The five-year figure would amount to approximately 35 hectares ($139.17 \div 20 \times 5$). Adding the “choice” factor to the gross land area generates a land requirement of **174 hectares** ($139 \text{ ha} + 35 \text{ ha}$).

Finally, a “**vacancy**” allowance is included. A “rule of thumb” vacancy allowance is 3 years of gross land needs, which amounts to 21 hectares ($139.17 \div 20 \times 3$). The result is a total industrial land requirement of **195 hectares** to accommodate projected growth in industrial employment, which allowing the market to function effectively.

8.3.4 Commercial Land Need Calculations

Table 7-5 shows that approximately **80,000 square metres** of commercial building space will be needed to accommodate projected growth in commercial employment over the 2001-2021 period. This converts to **8.0 hectares**.

Applying a 30% coverage factor generates a “net land area” requirement of **26.67 hectares** ($8 \text{ ha} \div 0.30$).

In addition to accommodating the building on the site, the following additional local public services may be required: parking, local roads, stormwater management facilities, utilities, park dedication. The “net land area”, is increased by a factor of **10%** to allow for these additional uses. Thus, the land requirement increases by **2.67 hectares** to **29.34 hectares (gross land need)**.

Choice Factor of two years of gross land need = 3 hectares ($29.34 \div 20 \times 2 = 2.93 \text{ ha}$, rounds to 3 ha).

Vacancy Factor of 1 year of gross land need = 1.5 hectares ($29.34 \div 20 \times 1 = 1.467 \text{ ha}$, rounds to 1.5 ha).

Taken together, a total of approximately **34 hectares** will be needed to accommodate projected growth in commercial employment.

8.3.5 Institutional Land Need Calculations

Table 7-5 shows that **47,000 square metres** of institutional building space will be needed to accommodate projected growth in institutional employment over the 2001-2021 period. This is equivalent to **4.7 hectares**.

Applying a 25% coverage factor generates a “net land area” requirement of **18.8 hectares** ($4.7 \text{ ha} \div .25$).

“Net land area”, is increased by a factor of **10%** to allow for additional public uses. Thus, the land requirement increases by **1.88 hectares** to generate a gross land area of **20.7 hectares**.

Unlike the industrial and commercial land markets, the institutional land market does not require choice and vacancy allowances to function properly. Instead, institutional projections are considered to be “population related.” As such, the need for institutional space is tied directly to projected growth in residential population. Accordingly, no additional allowances are required in order to determine the amount of land that should be designated for institutional use.

In sum, a total of approximately **21 hectares** will be needed to accommodate projected growth in institutional employment.

It is noted that institutional uses such as places of worship would not be captured in the employment projections, as they are not significant employers. Therefore, additional land requirements for places of worship need to be considered separately. This discussion follows in Section 8.3.7.

8.3.6 Summary of Employment Land Needs

Table 8-2 summarizes the land that will be needed to accommodate the growth in employment that has been projected over the 2001-2021 period. It also outlines the lands that are currently available to accommodate the anticipated growth in employment. These are the lands that are currently vacant and designated for employment uses (industrial, commercial). Table 8-2 also shows there is currently insufficient vacant designated lands in the Town to accommodate projected growth in employment.

The following land areas are required to meet the projected employment growth:

Industrial	195 hectares
Commercial	34 hectares
<u>Institutional</u>	<u>21 hectares</u>
Total Employment Lands	250 hectares

Currently, the following lands are vacant and available for employment use in the Town:

Alliston (Deferred Industrial Lands)	60 hectares
Tottenham – Industrial	20 hectares
<u>Tottenham – Commercial Retail</u>	<u>5 hectares</u>
Total Available Employment Lands	85 hectares

Therefore, there is a need to designate an additional **165 ha** (420 acres) to meet projected employment requirements over the next 20 years (2001 to 2021).

In accordance with the policies of the current Official Plan, the majority of the projected employment growth should be directed to Alliston. The Town is in the process of preparing the Alliston Industrial/Commercial Secondary Plan, which can accommodate the majority of employment growth over the 2001 – 2021 period.

Table 8-2
Summary of Projected Employment Land Needs 2001-2021
Town of New Tecumseth

PART I: PROJECTED EMPLOYMENT LAND NEEDS	Industrial	Commercial	Institutional	Total
A. Projected Building Space for Employment to 2021 (sq. m)	334,000	80,000	47,000	461,000
B. Convert Square metres to Hectares	33.400	8.000	4.700	
C. Coverage Assumptions	30%	30%	25%	
D. Apply Coverage Assumptions = Net Land Area Requirement (ha)	111.33	26.67	18.80	
E. Net-to-Gross Factor	25%	10%	10%	
F. Apply Net to Gross Factor = Gross Land Area Requirement (ha) (1)	139.17	29.33	20.68	
G. Choice Factor (2) (Years Supply)	5	2	-	
H. Apply Choice Factor	34.79	2.93	-	
I. Vacancy Factor (3) (Years Supply)	3	1	-	
J. Apply Vacancy Factor	20.88	1.47	-	
K. Total Land Required 2001-2021 (ha) (F + H + J)	194.83	33.73	20.68	249.25
L. Rounded Figures (ha)	195	34	21	250

Notes:

- (1) For industrial lands, 25% is used to allow for collector and local roads, utilities, SMW facilities, road widenings, parks, EP for Industrial; 10% is used for commercial and institutional
- (2) For industrial lands, a 5-year supply of land should be available at any given time to ensure adequate choice in the market. For the commercial land market, a 2-year supply should be available at any time to ensure proper market function. No 'choice' factor is required for Institutional lands.
- (3) For industrial land market, a 3-year supply of land is assumed to be an adequate vacancy allowance. For the commercial land market, a 1-year supply vacancy allowance is considered appropriate. Vacancy allowance not required for Institutional lands.

PART II: EXISTING LAND SUPPLY

Summary of Vacant, Designated Land:

	Hectares (Gross)		
Alliston (Deferred Industrial Lands)	60		60
Tottenham (Industrial; Commercial Retail)	20	5	25
Total Vacant Designated Lands	80	5	85

PART III: ADDITIONAL LAND REQUIREMENTS (PART I minus PART II)

Additional lands to be designated to meet projected demand

	115	29	21	165
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8.3.7 Planning for Places of Worship

As noted earlier, determining the land needs for future places of worship would not be captured in the employment land calculations, as places of worship are not significant employers.

Research recently undertaken by C. N. Watson & Associates suggests that in planning for places of worship in urban areas, one place of worship may be expected to be needed for every 5,000 persons (depending on ethnicity of the population).

The research is showing that places of worship are tending to be larger in size and as such bring with them a greater demand for parking areas. Therefore, new place of worship sites tend to be larger than the traditional church sites found in older mature residential areas. The average size of new sites is in the range of 2 to 4 acres.

The population of the Town of New Tecumseth is projected to grow by 17,100 persons over the 2001-2021 period. Given this growth, and assuming a new facility will be required for every 5,000 persons, there would appear to be a need to plan for 3 to 4 new places of worship. Assuming an average site size of 3 acres generates a need for approximately 9 to 12 acres (3.6 to 4.8 hectares). The calculations are set out in Table 8-3.

	Projected Population Growth 2001-2021	No. of new Places of Worship	Land Needs (acres)	Land Needs (hectares)
New Tecumseth Total	17,100	3 to 4	9 to 12	3.6 to 4.8
Alliston and environs ⁶	12,300	2 to 3	6 to 9	2.4 to 3.6
Tottenham and environs ⁷	4,800	1	3	1.2

The majority of growth (but not all) is projected for Alliston and as such most (but not all) of the need for new places of worship could be expected to occur in Alliston. Given Tottenham's size and projected growth, there may be a lesser need for a new place of worship site in that community. Beeton is not expected to be able to attract large new places of worship. Such demand is expected to be accommodated in Alliston. None of this is to say, however that there may not be small start-up worship groups in places like Beeton. However, the establishment of larger formal places of worship are increasingly business

⁶ Includes all of the population growth projected for Alliston, Briar Hill and Beeton, and one half of the growth projected for Rural Tecumseth.

⁷ Includes projected growth for Tottenham and one half of the population growth projected for Rural Tecumseth.

decisions by religious organizations, and a key locational criterion is a critical mass of membership.

In some instances, a minimum congregation size in the order 1,000 persons is needed in order to secure a full time priest/minister. In addition, place of worship facilities are becoming more multifunctional, often also accommodating “non-worship” activities such as day care and social, educational and recreational events. They also tend to be used more frequently throughout the week.

Not surprisingly, the factors that draw people to new places of worship today are increasingly related to the range services offered (child care, “moms and tots” programs, organized activities for children) in addition to traditional religious alliances.

Another approach to calculating land need for places of worship is to start with participation rates and from there calculate need. The projected population growth for New Tecumseth for 2001 to 2021 is 17,100. Assuming a 20% participation rate generates 3,420 persons who can be expected to become members of a place of worship organization. Assuming a minimum congregation size of 800 to 1,000 persons per place of worship, suggests there will be a need for approximately 3 to 4 new facilities. At an average site size of 3 acres, a total of 9 to 12 acres (3.6 to 4.8 ha) of land would be required, Town wide. Refer to the discussion above regarding the breakdown by community.

8.3.8 Conclusion: Overall Non-Residential Land Needs

Table 8-4 summarizes overall non-residential land needs (i.e., employment and place of worship) for the Town of New Tecumseth for the period 2001 to 2021. It shows that approximately an additional **170 hectares** should be designated for non-residential purposes. This includes industrial, commercial and institutional employment lands as well as lands for new places of worship.

Table 8-4 Summary of Non-Residential Land Needs Town of New Tecumseth, 2001 to 2021			
	Industrial	Commercial	Institutional
Lands requirements to meet employment projections	195	34	21
Less Vacant Land Available to Address Need	80	5	0
Employment Lands to be Designated	115	29	21
Land requirements for new Places of Worship			4
Total Non-residential Land Needs by Sector	115	29	25
Overall Non-residential Land Needs (all sectors)	169 ha rounded to 170 hectares		

APPENDIX A
2001 POPULATION AND HOUSEHOLD ESTIMATES
FOR NEW TECUMSETH AND
CONSTITUENT COMMUNITIES

TABLE A-1
FIVE YEAR GROWTH FORECAST
MID1996 TO MID 2001

		PERSONS
Population To Mid-1996 (1)		22,902
Occupants of New Housing Units, Mid 1996 to Mid 2001	<i>Units (2)</i>	1,112
	<i>multiplied by persons per unit (3)</i>	2.72
	<i>gross population increase</i>	3,027
Decline in Housing Unit Occupancy, Mid 1996 to Mid 2001	<i>Units (4)</i>	7,920
	<i>multiplied by ppu. decline rate (5)</i>	-0.010
	<i>total decline in population</i>	(80)
Population Estimate to Mid 2001		25,849
<i>Net Population Increase, Mid 1996 - Mid 2001</i>		2,947

(1) 1996 population taken from Census of Canada.

(2) Estimated residential units constructed, mid 1996 to mid 2001, based on building permit issuances.

(3) Average number of persons per unit (ppu.) is assumed to be 2.72, calculated as follows:

Structural Type	Persons Per Unit	% Distribution of Estimated Units	Weighted Persons Per Unit Average
<i>Single family & semi-detached</i>	2.80	82%	2.29
<i>Multiples except apartments</i>	2.60	12%	0.31
<i>Apartments</i>	1.94	6%	0.12
Total		100%	2.72

Based on Census data.

(4) 1996 households taken from StatsCan Census.

(5) Decline occurs due to aging of the population and family life cycle changes, lower fertility rates and changing economic conditions.

Note: Numbers may not calculate precisely due to rounding.

TABLE A-2

TOWN OF NEW TECUMSETH ESTIMATED POPULATION AND HOUSING UNITS BY COMMUNITY

Municipality	1996 Existing Population	1996 Existing Households
Alliston	8,687	2,938
Beeton	2,886	958
Tottenham	4,322	1,411
Briar Hill Development	1,312	601
Rest of New Tecumseth	5,695	2,012
Total	22,902	7,920

1996-2000 ADDITIONAL UNIT ESTIMATE

Municipality	1996-2000 New Units				2001 Unit Estimate
	Singles/ Semi-Detached	Townhouses	Apartments	Total	
Alliston	279	55	0	334	3,272
Beeton	186	0	0	186	1,144
Tottenham	140	79	0	219	1,630
Briar Hill Development	248	0	70	318	919
Rest of New Tecumseth	56	0	0	56	2,068
Total	909	134	70	1,113	9,033

Note: Assumes a 6 month lag between construction and occupancy

2001 TOTAL POPULATION ESTIMATE

Municipality	Existing 1996	2001 Existing Population Adjustment Based on Decline Factor	New Units 1996-2000	New Growth Average PPU	New Population Growth 1996-2000	2001 Total Population Estimate
Alliston	8,687	8,656	334	3.05	1,017	9,673
Beeton	2,886	2,876	186	3.05	568	3,444
Tottenham	4,322	4,307	219	3.05	667	4,974
Briar Hill Development	1,312	1,307	318	1.90	605	1,912
Rest of New Tecumseth	5,695	5,675	56	3.05	170	5,845
Total	22,902	22,822	1113	3.05	3,027	25,848

Numbers may not calculate precisely due to rounding

Note: See Summary Table A-1 for Town-wide details

Source: 1996 Census by Enumeration Area; Statistics Canada Building Permits, 1996-2000 (distribution based on Town estimate)

APPENDIX B
REVIEW OF RECENT FORECASTS FOR THE TOWN AND
AREA

B. REVIEW OF RECENT FORECASTS FOR THE TOWN AND AREA

This appendix summarizes 2001-2011 (10 year), 2001-2021 (20 year) and in some cases, 30 year population growth forecasts for:

- Greater Toronto Area (Table B-1)
- Regions of Peel and York (Table B-2)
- County of Simcoe (Table B-3)
- Town of New Tecumseth (Table B-4)

TABLE B-1
RECENT GREATER TORONTO AREA¹ POPULATION FORECASTS
(000)

	1996	2001	2011	2021	2031	10 Year Increase		20 Year Increase
						2001-2011	2011-2021	2001-2021
Ministry of Finance ² (Reference Scenario)	4,778.9	5,265.7	6,137.6	6,950.1	n/a	871.9	812.5	1,684.4
GTCC Forecast ³	4,781.0	5,284.0	6,260.0	6,975.0	7,450.0	976.0	715.0	1,691.0

¹ York, Peel, Halton, Durham Regions and the City of Toronto

² Ministry of Finance, "Ontario Population Projections, 1999-2021", July 2000

³ "Final Report of the GTA Steering Committee on Population and Employment Forecasts for the Greater Toronto Area" - Report to the Greater Toronto Co-ordinating Committee, March 2000

TABLE B-2
RECENT PEEL/YORK POPULATION FORECASTS
(000)

	1996	2001	2011	2021	2031	10 Year Increase		20 Year Increase
						2001-2011	2011-2021	2001-2021
GTCC ¹								
Peel	882.0	1,000.0	1,185.0	1,350.0	1,400.0	185.0	165.0	350.0
York	612.0	760.0	1,010.0	1,200.0	1,360.0	250.0	190.0	440.0
<i>Total</i>	<i>1,494.0</i>	<i>1,760.0</i>	<i>2,195.0</i>	<i>2,550.0</i>	<i>2,760.0</i>	<i>435.0</i>	<i>355.0</i>	<i>790.0</i>
Municipal Forecasts ²								
Peel	855.0	985.0	1,185.0	1,360.0	n/a	200.0	175.0	375.0
York	611.7	883.0	1,008.0	1,195.0	n/a	125.0	187.0	312.0
<i>Total</i>	<i>1,466.7</i>	<i>1,868.0</i>	<i>2,193.0</i>	<i>2,555.0</i>	-	<i>325.0</i>	<i>362.0</i>	<i>687.0</i>

¹ See Table B-1 for sources

² As cited in GO Transit Development Charges Background Study (note that York Region figure is subject to change pending the completion of the Oak Ridges Moraine process)

TABLE B-3
RECENT SIMCOE COUNTY POPULATION FORECASTS¹
(000)

	1996	2001	2011	2021	2028	10 Year Increase		20 Year Increase
						2001-2011	2011-2021	2001-2021
Ministry of Finance ² (Reference Scenario)	339.9	383.8	472.1	571.8	645.7	88.3	99.7	188.0
Strategic Projections ⁴	329.9	n/a	n/a	593.5	n/a			
County of Simcoe Updated OP Forecast (Reference)	329.9	370.5	449.4	530.7	n/a	78.9	81.3	160.2

¹ Including Barrie and Orillia

² See Table B-1 footnotes for sources

³ Hemson Consulting Ltd., May 1997

⁴ Projections prepared for the Office of the Greater Toronto Area (OGTA) as part of (unofficial) projections for the Greater Golden Horseshoe

TABLE B-4
RECENT NEW TECUMSETH GROWTH FORECASTS
(000)

	1996	2001	2011	2021	2030	10 Year Increase		20 Year Increase
						2001-2011	2011-2021	2001-2021
2000 Official Plan Targets ¹	22.9	25.9	33.1	42.4		7.2	9.3	16.5
Alliston Secondary Plan Retail Analysis Report ²	23.6	26.7	34.1	43.6	n/a	7.4	9.5	16.9
Ministry of Transportation Planning Forecasts ³		26.6	33.1 - 33.2	40.5 - 41.3	47.8 - 49.8	6.5	7.4 - 8.1	13.9 - 14.7
1992 Official Plan ³ (Final Report on Housing)	22.9	25.0	29.9	n/a	n/a	4.9	n/a	n/a
Simcoe County Official Plan forecast for New Tecumseth ⁵	22.9	25.3	30.0	n/a	n/a	4.7	n/a	n/a
Sewage Treatment Plan Capacity Analysis, 1995 ⁶	23.4	25.5	30.5	36.5	42.9	5.0	6.0	11.0

¹ Included in Official Plan Amendment No. 21, Table 1, page 8, October 2000

² Retail Market Needs Study, Alliston Secondary Plan, May 1999, W. Scott Morgan, Table 1

³ Unpublished Ministry of Transportation population forecasts, used for highway planning purposes (2001)

⁴ Town of New Tecumseth Official Plan, "Final Report on Housing", Brethour Research Associates Limited, November 30, 1992, Table 1

⁵ The County Official Plan forecast for New Tecumseth is 32,300 in 2016, approx. equivalent to the 2011 numbers for the first three forecasts on this table.

⁶ Appendix K, "Land Use, Population Forecast and Sanitary Sewage Flow Design Criteria", C.C. Tatham & Associates Ltd., 1995, Table K.2

**TABLE B-5
PROJECTED POPULATION GROWTH PER ANNUM
FOR SELECTED URBAN CENTRES
(GREATER GOLDEN HORSESHOE (GGH) FORECAST)**

	Average Annual Growth Rate	20 Year Growth (Based on average annual growth rate)
Southern Simcoe/Barrie	7,900	158,000
Total Simcoe	10,500	210,000
Newmarket/Aurora	6,300	126,000
Richmond Hill	9,000	180,000
Markham	4,600	92,000
Vaughan	6,500	130,000
Brampton	8,600	172,000
Mississauga	23,500	470,000
Orangeville	1,100	22,000

Source: Prepared by Strategic Projections for the OGTA (March, 2000)

APPENDIX C
KEY BACKGROUND DATA FOR
TOWN OF NEW TECUMSETH POPULATION/
HOUSING UNIT FORECAST

**TABLE C-1
COUNTY OF SIMCOE
RESIDENTIAL BUILDING PERMITS FOR NEW UNITS, 1985-2000**

Municipality	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Adjala-Tosorontio	61	81	126	113	101	51	27	43	45	35	26	36	67	60	74	60
Barrie	461	818	1,176	1,557	2,067	2,680	994	640	636	542	873	1,113	1,657	1,669	2,131	1,792
Bradford West-Gwillimbury	221	272	743	318	183	29	64	73	262	205	89	151	161	147	210	114
Clearview	104	118	186	178	159	100	52	32	26	49	45	47	91	63	92	94
Collingwood	83	333	359	444	707	117	110	52	58	117	62	134	172	115	194	201
Essa	89	99	148	220	248	106	354	185	85	60	43	44	35	46	84	77
Innisfil	128	312	278	692	591	173	145	246	153	131	112	203	207	241	327	236
Midland	32	176	216	197	234	166	132	49	43	31	98	16	23	54	32	33
New Tecumseth	101	365	242	606	165	165	163	218	165	379	97	143	228	300	272	169
Orillia	199	183	201	365	303	293	223	260	109	79	70	130	114	178	91	113
Oro-Medonte	101	168	252	320	411	134	92	96	73	93	66	106	92	86	143	187
Penetanguishene	58	50	91	110	128	41	24	66	11	14	48	37	48	48	46	28
Ramara	0	21	0	20	0	35	17	23	5	38	51	51	51	39	60	54
Severn	84	103	140	213	173	78	47	43	57	52	36	63	81	56	105	75
Springwater	23	176	255	205	204	115	115	121	70	78	34	50	78	92	126	118
Tay	49	70	119	137	177	66	40	59	30	74	59	48	50	45	49	35
Tiny	124	130	221	243	283	144	93	91	59	59	71	36	55	70	87	91
Wasaga Beach	25	99	198	254	167	125	146	298	223	252	165	236	304	231	478	252
TOTAL	1,943	3,574	4,951	6,192	6,301	4,618	2,838	2,595	2,110	2,288	2,045	2,644	3,514	3,540	4,601	3,729

Source: Statistics Canada Catalogue 64-001

TABLE C-2

NEW TECUMSETH
 HISTORICAL RESIDENTIAL BUILDING PERMITS AND COMPLETIONS
 YEARS 1985-2000

Year	RESIDENTIAL BUILDING PERMITS				COMPLETIONS			
	Low Density (Singles & Semis)	Medium Density (Townhouses)	High Density (Apartments)	Total	Low Density (Singles & Semis)	Medium Density (Townhouses)	High Density (Apartments)	Total
1985	100	0	13	113	-	-	-	-
1986	355	0	15	370	-	-	-	-
1987	236	0	14	250	-	-	-	-
1988	433	26	152	611	269	26	0	295
1989	125	32	8	165	202	0	53	255
1990	122	0	43	165	164	89	8	261
1991	57	0	106	163	94	6	0	100
1992	144	74	0	218	80	43	106	229
Sub-total	1,572	132	351	2,055	809	164	167	1,140
Average	197	17	44	257	162	33	33	228
% Breakdown	76.5%	6.4%	17.1%	100.0%	39.4%	8.0%	8.1%	55.5%
1993	127	38	0	165	170	84	0	254
1994	336	43	0	379	294	17	0	311
1995	77	20	0	97	96	33	0	129
1996	92	51	0	143	142	0	0	142
1997	207	21	0	228	133	0	0	133
1998	208	23	70	301	191	14	0	205
1999	243	29	0	272	156	8	0	164
2000	159	10	0	169	259	117	68	444
2001 (Estimate)	103	38	0	141				
Sub-total	1,552	273	70	1,895	1,441	273	68	1,782
Average	172	30	8	211	180	34	9	223
% Breakdown	81.9%	14.4%	3.7%	100.0%	80.9%	15.3%	3.8%	100.0%
<u>1985 - 2000</u>								
Total	3,124	405	421	3,950	2,250	437	235	2,922
Average	184	24	25	232	173	34	18	225
% Breakdown	79.1%	10.3%	10.7%	100.0%	77.0%	15.0%	8.0%	100.0%

Sources:

Building Permits- Statistics Canada Publication, 64-001

Completions- CMHC Ontario Housing Market Report.

TABLE C-3
SUMMARY OF RESIDENTIAL UNITS IN THE DEVELOPMENT PROCESS

Stage of Development	Density Type			
	Low	Medium	High	Total
Registered But Not Built	796	308	182	1,286
<i>% Allocation</i>	61.9%	24.0%	14.2%	100.0%
Draft Approved	2,473	214	198	2,885
<i>% Allocation</i>	85.7%	7.4%	6.9%	100.0%
Referred to OMB	243	265	0	508
<i>% Allocation</i>	47.8%	52.2%	0.0%	100.0%
Future Proposed	2,356	341	572	3,269
<i>% Allocation</i>	72.1%	10.4%	17.5%	100.0%
Total	5,868	1,128	952	7,948
<i>% Allocation</i>	73.8%	14.2%	12.0%	100.0%

Source: Town of New Tecumseth Planning Department, October 2001.

TABLE C-3a
SUMMARY OF RESIDENTIAL UNITS IN THE DEVELOPMENT PROCESS
COMMUNITY OF ALLISTON

Stage of Development	Density Type			
	Low	Medium	High	Total
Registered Not Built	5	0	0	5
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Draft Approved	685	214	198	1,097
<i>% Allocation</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>
Referred to OMB	243	265	0	508
<i>% Allocation</i>	<i>47.8%</i>	<i>52.2%</i>	<i>0.0%</i>	<i>100.0%</i>
Future Proposed	1,355	341	572	2,268
<i>% Allocation</i>	<i>59.7%</i>	<i>15.0%</i>	<i>25.2%</i>	<i>100.0%</i>
Total	2,288	820	770	3,878
<i>% Allocation</i>	<i>59.0%</i>	<i>21.1%</i>	<i>19.9%</i>	<i>100.0%</i>

Source: Town of New Tecumseth Planning Department, October 2001.

TABLE C-3b
SUMMARY OF RESIDENTIAL UNITS IN THE DEVELOPMENT PROCESS
COMMUNITY OF BEETON

Stage of Development	Density Type			
	Low	Medium	High	Total
Registered Not Built	36	0	0	36
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Draft Approved	112	0	0	112
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Referred to OMB	0	0	0	0
<i>% Allocation</i>	<i>100.0%</i>	<i>100.0%</i>	<i>100.0%</i>	<i>100.0%</i>
Future Proposed	0	0	0	0
<i>% Allocation</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>
Total	148	0	0	148
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>

Source: Town of New Tecumseth Planning Department, October 2001.

TABLE C-3c
SUMMARY OF RESIDENTIAL UNITS IN THE DEVELOPMENT PROCESS
TECUMSETH

Stage of Development	Density Type			
	Low	Medium	High	Total
Registered Not Built	510	308	182	1,000
<i>% Allocation</i>	<i>51.0%</i>	<i>30.8%</i>	<i>18.2%</i>	<i>100.0%</i>
Draft Approved	1,003	0	0	1,003
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Referred to OMB	0	0	0	0
<i>% Allocation</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>
Future Proposed	1,000	0	0	1,000
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Total	2,513	308	182	3,003
<i>% Allocation</i>	<i>83.7%</i>	<i>10.3%</i>	<i>6.1%</i>	<i>100.0%</i>

Source: Town of New Tecumseth Planning Department, October 2001.

TABLE C-3d
SUMMARY OF RESIDENTIAL UNITS IN THE DEVELOPMENT PROCESS
COMMUNITY OF TOTTENHAM

Stage of Development	Density Type			
	Low	Medium	High	Total
Registered Not Built	245	0	0	245
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Draft Approved	673	0	0	673
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Referred to OMB	0	0	0	0
<i>% Allocation</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>
Future Proposed	1	0	0	1
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>
Total	919	0	0	919
<i>% Allocation</i>	<i>100.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>100.0%</i>

Source: Town of New Tecumseth Planning Department, October 2001.

**TABLE C-4
PERCENTAGE OF HISTORICAL BUILDING PERMITS BY COMMUNITY, 1996-2000
SINGLE AND SEMI-DETACHED UNITS**

Community	1996	1997	1998	1999	2000
Alliston	40%	36%	33%	32%	6%
Beeton	7%	24%	26%	21%	19%
Tottenham	12%	14%	17%	13%	23%
Tecumseth North (Briar Hill Development)	35%	21%	20%	24%	45%
Tecumseth South (Rural)	5%	4%	5%	9%	8%
Total	100%	100%	100%	100%	100%

**PERCENTAGE OF HISTORICAL BUILDING PERMITS BY COMMUNITY
TOWNHOUSES**

Community	1996	1997	1998	1999	2000
Alliston	100%	100%	37%	46%	0%
Beeton	0%	0%	0%	0%	0%
Tottenham	0%	0%	63%	54%	100%
Tecumseth North (Briar Hill Development)	0%	0%	0%	0%	0%
Tecumseth South (Rural)	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

**PERCENTAGE OF HISTORICAL BUILDING PERMITS BY COMMUNITY
APARTMENTS**

Community	1996	1997	1998	1999	2000
Alliston	0%	0%	0%	0%	0%
Beeton	0%	0%	0%	0%	0%
Tottenham	0%	0%	0%	0%	0%
Tecumseth North (Briar Hill Development)	0%	0%	100%	0%	0%
Tecumseth South (Rural)	0%	0%	0%	0%	0%
Total	0%	0%	100%	0%	0%

**PERCENTAGE OF HISTORICAL BUILDING PERMITS BY COMMUNITY
TOTAL**

Community	1996	1997	1998	1999	2000
Alliston	40%	41%	47%	35%	5%
Beeton	7%	23%	17%	17%	16%
Tottenham	12%	13%	19%	21%	35%
Tecumseth North (Briar Hill Development)	35%	20%	13%	20%	37%
Tecumseth South (Rural)	5%	4%	3%	8%	6%
Total	100%	100%	100%	100%	100%

Source: Town of New Tecumseth Buildings Department

**TABLE C-5
POPULATION CHANGE FROM EXISTING HOUSING INVENTORY AND NEW DEVELOPMENT
NEW TECUMSETH**

1996-2001																
Residential Unit Type	Existing - 1996			Change in Existing Population Base			New Growth			Total - 2001						
	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Units	PPU	Pop'n				
Single & Semi Detached	6,300	80%	3.02	19,040	6,300	80%	2.95	18,595	909	82%	2.80	2,545	7,209	80%	2.93	21,140
Townhouses	735	9%	2.59	1,900	735	9%	2.86	2,104	134	12%	2.60	348	869	10%	2.82	2,452
Apartments	860	11%	1.76	1,515	860	11%	1.90	1,638	69	6%	1.94	134	929	10%	1.91	1,772
Other	25			155	25			155	0			0	25			155
Institutional				292				330				0				330
Total	7,920	100%	2.89	22,902	7,920	100%	2.84	22,822	1,112	100%	2.72	3,027	9,032	100%	2.86	25,849

2001-2006																
Residential Unit Type	Existing - 2001			Change in Existing Population Base			New Growth			Total - 2006						
	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Units	PPU	Pop'n				
Single & Semi Detached	7,209	80%	2.93	21,140	7,209	80%	2.90	20,886	1,038	75%	2.96	3,071	8,247	79%	2.90	23,957
Townhouses	869	10%	2.82	2,452	869	10%	2.84	2,465	170	12%	2.59	441	1,039	10%	2.80	2,906
Apartments	929	10%	1.91	1,772	929	10%	1.90	1,762	177	13%	1.94	344	1,106	11%	1.90	2,106
Other	25			155	25			155	0			0	25			155
Institutional				330				327				49				376
Total	9,032	100%	2.86	25,849	9,032	100%	2.80	25,595	1,385	100%	2.78	3,905	10,417	100%	2.83	29,500

2006-2011																
Residential Unit Type	Existing - 2006			Change in Existing Population Base			New Growth			Total - 2011						
	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Units	PPU	Pop'n				
Single & Semi Detached	8,247	79%	2.90	23,957	8,247	79%	2.87	23,657	1,206	75%	2.96	3,568	9,453	79%	2.88	27,225
Townhouses	1,039	10%	2.80	2,906	1,039	10%	2.95	3,061	177	11%	2.60	460	1,216	10%	2.90	3,521
Apartments	1,106	11%	1.90	2,106	1,106	11%	1.95	2,154	229	14%	1.94	445	1,335	11%	1.95	2,599
Other	25			155	25			155	0			0	25			155
Institutional				376				373				59				433
Total	10,417	100%	2.83	29,500	10,417	100%	2.79	29,400	1,612	100%	2.77	4,532	12,029	100%	2.82	33,933

2011-2016																
Residential Unit Type	Existing - 2011			Change in Existing Population Base			New Growth			Total - 2016						
	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Units	PPU	Pop'n				
Single & Semi Detached	9,453	79%	2.88	27,225	9,453	79%	2.86	27,077	1,206	75%	2.96	3,568	10,659	78%	2.87	30,645
Townhouses	1,216	10%	2.90	3,521	1,216	10%	2.95	3,584	178	11%	2.60	462	1,394	10%	2.90	4,046
Apartments	1,335	11%	1.95	2,599	1,335	11%	2.03	2,707	229	14%	1.94	445	1,564	11%	2.02	3,152
Other	25			155	25			155	0			0	25			155
Institutional				433				428				62				491
Total	12,029	100%	2.82	33,933	12,029	100%	2.79	33,951	1,613	100%	2.77	4,537	13,642	100%	2.82	38,489

2016-2021																
Residential Unit Type	Existing - 2016			Change in Existing Population Base			New Growth			Total - 2021						
	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Units	PPU	Pop'n				
Single & Semi Detached	10,659	78%	2.87	30,645	10,659	78%	2.87	30,540	1,206	75%	2.96	3,568	11,865	78%	2.87	34,108
Townhouses	1,394	10%	2.90	4,046	1,394	10%	2.92	4,073	178	11%	2.60	462	1,572	10%	2.88	4,535
Apartments	1,564	11%	2.02	3,152	1,564	11%	2.04	3,185	229	14%	1.94	445	1,793	12%	2.02	3,630
Other	25			155	25			155	0			0	25			155
Institutional				491				487				61				548
Total	13,642	100%	2.82	38,489	13,642	100%	2.78	38,440	1,613	100%	2.77	4,536	15,255	100%	2.82	42,976

2021-2026																
Residential Unit Type	Existing - 2021			Change in Existing Population Base			New Growth			Total - 2026						
	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Units	PPU	Pop'n				
Single & Semi Detached	11,865	78%	2.87	34,108	11,865	78%	2.82	33,462	1,206	75%	2.96	3,568	13,071	77%	2.83	37,030
Townhouses	1,572	10%	2.88	4,535	1,572	10%	2.90	4,557	178	11%	2.60	462	1,750	10%	2.87	5,019
Apartments	1,793	12%	2.02	3,630	1,793	12%	2.02	3,617	229	14%	1.94	445	2,022	12%	2.01	4,062
Other	25			155	25			155	0			0	25			155
Institutional				548				544				53				597
Total	15,255	100%	2.82	42,976	15,255	100%	2.74	42,335	1,613	100%	2.77	4,528	16,868	100%	2.78	46,863

2026-2031																
Residential Unit Type	Existing - 2026			Change in Existing Population Base			New Growth			Total - 2031						
	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Dwelling Units	PPU	Pop'n	Units	PPU	Pop'n				
Single & Semi Detached	13,071	77%	2.83	37,030	13,071	77%	2.80	36,640	1,206	75%	3.00	3,618	14,277	77%	2.82	40,258
Townhouses	1,750	10%	2.87	5,019	1,750	10%	2.86	4,997	178	11%	2.60	462	1,928	10%	2.83	5,459
Apartments	2,022	12%	2.01	4,062	2,022	12%	2.01	4,063	229	14%	1.94	445	2,251	12%	2.00	4,508
Other	25			155	25			155	0			0	25			155
Institutional				597				594				56				650
Total	16,868	100%	2.78	46,863	16,868	100%	2.72	46,449	1,613	100%	2.81	4,581	18,481	100%	2.76	51,030

**TABLE C-6
NEW TECUMSETH
ESTIMATE OF THE ANTICIPATED AMOUNT, TYPE AND LOCATION OF DEVELOPMENT**

DEVELOPMENT LOCATION	TYPE TIMING	NEW UNIT GROWTH ¹				NEW UNIT POPULATION			2001 UNITS AND POPULATION ²		EXISTING PLUS NEW UNITS AND POPULATION	
		SINGLES & SEMIS	MULTIPLES EXCEPT APTS.	APARTMENTS	TOTAL RESIDENTIAL UNITS	POPULATION IN NEW UNITS	EXISTING UNIT POPULATION CHANGE	NET POPULATION INCREASE	2001 EXISTING RESIDENTIAL UNITS	2001 EXISTING UNIT POPULATION	EXISTING PLUS NEW RESIDENTIAL UNITS	NET EXISTING PLUS NEW POPULATION
Alliston	2001-2006	413	90	90	593	1,773	(95)	1,678	3,272	9,673	3,865	11,352
	2001-2011	894	195	195	1,284	3,788	(132)	3,655	3,272	9,673	4,556	13,328
	2001-2016	1,376	300	300	1,976	5,826	(125)	5,701	3,272	9,673	5,247	15,374
	2001-2021	1,857	405	405	2,667	7,865	(143)	7,722	3,272	9,673	5,939	17,395
	2001-2026	2,339	510	510	3,359	9,904	(383)	9,521	3,272	9,673	6,630	19,194
	2001-2031	2,820	615	615	4,050	11,942	(538)	11,404	3,272	9,673	7,322	21,077
Beeton	2001-2006	138	8	8	154	492	(34)	458	1,144	3,444	1,298	3,902
	2001-2011	300	17	17	333	1,048	(47)	1,001	1,144	3,444	1,477	4,445
	2001-2016	461	26	26	512	1,612	(45)	1,568	1,144	3,444	1,657	5,012
	2001-2021	622	35	35	692	2,176	(51)	2,125	1,144	3,444	1,836	5,569
	2001-2026	784	44	44	871	2,741	(136)	2,604	1,144	3,444	2,015	6,048
	2001-2031	945	52	52	1,050	3,305	(192)	3,113	1,144	3,444	2,194	6,557
Tottenham	2001-2006	231	33	66	330	975	(49)	927	1,630	4,974	1,959	5,901
	2001-2011	500	71	143	714	2,083	(68)	2,015	1,630	4,974	2,343	6,989
	2001-2016	768	110	220	1,098	3,205	(64)	3,140	1,630	4,974	2,728	8,114
	2001-2021	1,037	148	296	1,482	4,326	(74)	4,253	1,630	4,974	3,112	9,226
	2001-2026	1,306	187	373	1,866	5,448	(197)	5,251	1,630	4,974	3,496	10,225
	2001-2031	1,575	225	450	2,250	6,569	(277)	6,292	1,630	4,974	3,880	11,266
Briar Hill	2001-2006	165	22	33	220	412	(19)	393	919	1,912	1,139	2,305
	2001-2011	357	48	71	476	892	(26)	866	919	1,912	1,395	2,778
	2001-2016	549	73	110	732	1,372	(25)	1,347	919	1,912	1,651	3,259
	2001-2021	741	99	148	988	1,852	(28)	1,824	919	1,912	1,907	3,736
	2001-2026	933	124	187	1,244	2,332	(76)	2,257	919	1,912	2,163	4,169
	2001-2031	1,125	150	225	1,500	2,812	(106)	2,706	919	1,912	2,419	4,618
Tecumseth	2001-2006	88	0	0	88	290	(57)	233	2,068	5,845	2,156	6,078
	2001-2011	190	0	0	190	618	(80)	538	2,068	5,845	2,258	6,383
	2001-2016	293	0	0	293	950	(76)	874	2,068	5,845	2,360	6,719
	2001-2021	395	0	0	395	1,282	(87)	1,196	2,068	5,845	2,463	7,041
	2001-2026	498	0	0	498	1,615	(232)	1,383	2,068	5,845	2,565	7,228
	2001-2031	600	0	0	600	1,947	(325)	1,622	2,068	5,845	2,668	7,467
Town-Wide Total	2001-2006	1,035	153	197	1,384	3,942	(254)	3,689	9,033	25,848	10,417	29,537
	2001-2011	2,241	331	426	2,997	8,429	(354)	8,075	9,033	25,848	12,030	33,924
	2001-2016	3,447	509	655	4,610	12,965	(335)	12,631	9,033	25,848	13,643	38,479
	2001-2021	4,653	687	884	6,224	17,502	(383)	17,119	9,033	25,848	15,257	42,967
	2001-2026	5,859	865	1,113	7,837	22,039	(1,024)	21,015	9,033	25,848	16,870	46,863
	2001-2031	7,065	1,042	1,342	9,450	26,576	(1,438)	25,137	9,033	25,848	18,483	50,986

¹ Net of Demolitions and Conversions

² Based on 1996 Census, by Enumeration Area.

Notes:

See text for basis of distribution

APPENDIX D
KEY BACKGROUND DATA FOR
TOWN OF NEW TECUMSETH POPULATION/
EMPLOYMENT FORECAST

TABLE D-1
NON-RESIDENTIAL CONSTRUCTION VALUE
YEARS 1991-2000
(000's 2000 \$)

YEAR	Building Permit Value of Construction by Type			
	(in 000's of 1998 \$)			
	Commercial	Industrial	Institutional	Total
1991	4,060	1,100	2,243	7,403
1992	5,513	2,120	22,319	29,952
1993	3,865	3,479	4,187	11,531
1994	1,742	2,308	8,235	12,285
1995	1,492	1,588	576	3,656
Sub-total	16,672	10,595	37,560	64,827
Average	3,334	2,119	7,512	12,965
1996	4,859	28,268	1,450	34,577
1997	12,235	35,962	2,058	50,255
1998	10,857	12,624	438	23,919
1999	6,808	4,325	1,049	12,182
2000	7,522	3,496	8,535	19,553
Sub-total	42,281	84,675	13,530	140,486
Average	8,456	16,935	2,706	28,097
<u>1991-2000</u>				
10 Year Total	58,953	95,270	51,090	205,313
10 Year Average	5,895	9,527	5,109	20,531
% Breakdown	28.7%	46.4%	24.9%	100.0%

SOURCE: STATISTICS CANADA PUBLICATION, 64-203

Note: Inflated to 2000 dollars using Southam Construction Cost Index

**TABLE D-2
LARGEST COMPANIES IN NEW TECUMSETH BY SQUARE METRE**

Alliston

Ranking	Company	Business Description	Yr Est	Sq.M
1	Honda of Canada Mfg.	Industrial Manufacturing-Automobile	1984	168,600
2	Baxter Corporation	industrial Manufacturing-Sterile IV Bags and Solutions	1957	16,722
3	Nissin Transport (Canada) Inc.	Warehouse Distribution Centre	1998	9,290
4	Oetiker Limited/Hanso Technologies Ltd.	Industrial Manufacturing-Precision Stainless Steel Clamps	1979	11,613
5	Stevenson Memorial Hospital	Health Medical Services - Hospital, Emergency, Acute Car	1928	6,132
6	Zehrs Markets	Grocery/Food Service	1977	3,902
7	Alliston Home Building Centre-J.J Ytsma Building Material Ltd.	Hardware/Building Materials/Services	1992	2,323
8	IGA, Alliston	Grocery/Food Service		3,716
9	Alliston Feed Service Ltd.	Agriculture Supplies Service-Feed Mill	1995	2,973
10	PPG Canada Inc..	Industrial Manufacturing-Automotive Glass Distribution	1985	2,787
11	Canadian Tire Corp.- Alliston	Hardware/Building Materials/Services-Auto Parts		2,648
12	Sunrise Produce	Agriculture/Farm-Potato	1991	2,230
13	Ludlow's Garage Limited	Auto Sales/ Service-Heavy Truck	1953	2,044
14	St. Paul's Separate School	Educational Services-Elementary School.	1961	1,951
15	TSC Stores	Hardware/Building Materials/Services		1,858
16	Redis Investments Ltd.	Financial/Investment/Banking Services	1988	1,858
17	Process Instrument Systems Ltd/Alliston Engineering Ltd.	Industrial Manufacturing-Millwright	1973	1,858
18	Cargill Limited	Fertilizer, fertilizer blending, custom blends	1964	1,858
19	Lodestar Farm Ltd	Agriculture/Farm-Dairy	1946	1,672
20	Beaver Gas Bar	Auto Sales/Service-Gas Station		1,630

Beeton

Ranking	Company	Business Description	Yr Est	Sq.M
1	Simcoe Manor (Home For The Aged)	Nursing Home- for the aged: long-term facility	1899	13,750
2	Borden Metal Products (Canada) Ltd.	Manufacturer-metal fabricating/metal grating	1955	3,716
3	Tecumseth Beeton Central Public School	Educational Services -- Public School	1961	3,344
4	IGA, R.C. Jackson Foods Ltd./LCBO	Grocery/Food Service	1974	1,486
5	Simcoe York Printing & Publishing/Beeton Record Sentinel	Publication/Printing/Sales/Services	1974	1,394
6	Tecumseth Building Supply Ltd.	Hardware/Building Materials/Services	1988	1,301
7	Parsons Seeds Ltd.	Agriculture Supplies Service-Seeds	1890	1,022
8	Simcoe District Co-op Services	Agriculture Supplies Service	1947	929
9	Nottawasaga Police Services/Essa, New Tecumseth District	Public Safety/Emergency Services	1992	743
10	Prototier-1 Inc.	Industrial Manufacturing-Tool & Die	1996	557
11	Muddy Water Tavern	Restaurant/Bar	1985	557
12	New Tech Automotive Services	Auto/Service Repair	1995	557
13	Beeton Pharmacy & Home Health Care	Drug Store-Equipment and Patient needs	1992	418
14	Beeton Meats	Specialty Items-Butcher Meats	1978	372
15	Raymar Equipment Service	Sales/Repair-Electric Motors, Pumps	1976	372
16	Warren Service Lawn & Garden Equipment	Lawn/ Garden/Landscape/Sales/Equipment/Service	1977	362
17	Petro Can Station/Parmenter Auto Services	Auto Gas Service/Store	1994	325
18	Provincial Fire Prevention Ltd.	Public Safety/ Emergency Services-Fire Extinguishers	1956	325
19	Isabella's Country Cuisine	Restaurant/Bar	1994	302
20	Ilex Custom Woodworking	Industrial Manufacturing -Cabinet Making	1992	279

Tottenham

Ranking	Company	Business Description	Yr Est	Sq.M
1	Ventra Group Inc.,Seeburn Division	Industrial Manufacturing-OEM Coupling Devices	1966	10,219
2	PMC Film Canada Inc.	Industrial Manufacturer- Plastic Film		6,503
3	Hawman Container Services	Trucking Cartage Service/Storage	1996	2,787
4	Rod Abrams Funeral Home	Funeral Services		1,208
5	Parson A.D.L. Inc.	Health Medical Services-Products, Mfg. & Dist.	1982	929
6	Volk Autobody and Aircraft Refinishing Ltd.	Auto/Service Repair-Auto/Aircraft Refinishing	1966	743
7	Home Hardware-Tottenham	Hardware/Building Materials/Services	1977	650
8	Stone Automotive Services	Auto/Service Repair	1950	650
9	423059 Ontario Ltd.	Leasing-Residential & Commercial Office Space	1979	557
10	McGoey Brothers Insurance Brokers	Insurance Services	1900	557
11	Stewart's Baskets & Balloons	Specialty Items-Balloon decorating & gift baskets	1990	465
12	Liquor Control Board Of Ontario (Tottenham)	Government- Liquor Store	1975	418
13	New Tecumseth Public Library-Tottenham	Community Organization-Public Library		411
14	The Beer Store - Tottenham	Wine/Beer Making & Kits	1979	390
15	Ure Seal Ltd.	Industrial/Manufacturing-Urethane, Epoxy, Acrylic Coatings	1966	372
16	Guardian Drugs-Tottenham	Retail Pharmacy	1992	372
17	Stedman's V & S/Aldridge Enterprises	Department Store	1988	353
18	Tottenham Dental Centre	Health Dental Services	1989	279
19	Tony's Concord Auto Service	Auto/Service Repair	1974	279
20	Ruth Mabee Co. Ltd. Realtor	Real Estate/Agent/Holding Co./Broker	1969	279

Source: Nottawasaga Community Economic Development Corporation, 2001

TABLE D-3

**SUMMARY OF SQUARE METRE PER EMPLOYEE
NEW TECUMSETH**

Standard Industrial Classification	Square Footage Per Employee
Industrial	56
Commercial/Population Related	28
Institutional	74

Source: Developed by C.N Watson & Associates from Nottawasaga
Community Economic Development Corporation Employment Database

**TABLE D-4
SUMMARY OF NON-RESIDENTIAL UNITS IN THE DEVELOPMENT PROCESS**

Number	Applicant	Community	Type	Sq.m	Status
1	1228920 Ontario Ltd.	Alliston	Commercial	250	Proposed Draft Plan
2	Robert Dickey	Alliston	Commercial	unknown	Proposed Draft Plan
3	Rizzardo Brothers	Alliston	Commercial	7,000	Under Construction
4	Sutherland/Brouwer	Alliston	Industrial	7 blocks	Proposed Draft Plan
5	Gibson	Alliston	Industrial	1 blocks	Under Construction
6	Jozwiak	Alliston	Industrial	1 blocks	Proposed Draft Plan
7	Gibson Cultural Centre	Alliston	Institutional	unknown	Under Construction
8	S.M.C.D.S.B	Beeton	Institutional	3,517	Under Construction
9	Eagle Stone Concrete	Rural	Industrial	35,000	Referred to OMB
10	Tecumseth Estates Ltd.	Rural	Industrial	60 acres	Under Construction
11	Leach Farms	Rural	Industrial	4 blocks	Proposed Draft Plan
12	Yeaman	Rural	Commercial	unknown	Proposed Draft Plan
13	Cardinal Farm Supply	Rural	Commercial	750	Under Construction
14	Woodington Lake	Rural	Commercial	18 holes	ORM Moratorium
15	Mod-Aire/Milford	Tottenham	Commercial	8,922	Proposed Draft Plan
16	Niederhuber	Tottenham	Commercial	804	Referred to OMB
17	Mod-Aire/Interphase	Tottenham	Commercial	1,394	Proposed Draft Plan
18	Six Nights Development	Tottenham	Commercial	1,394	Proposed Draft Plan
19	Nordstar	Tottenham	Commercial	1,394	Proposed Draft Plan
20	Mod-Aire/Milford	Tottenham	Institutional	2 blocks	Proposed Draft Plan
21	Six Nights Development	Tottenham	Institutional	1 block	Proposed Draft Plan
22	F&P Manufacturing	Tottenham	Industrial	unknown	unknown

Source: Town of New Tecumseth Planning Department