

# City of Barrie

---

## Growth Management Strategy

### Phase 1

## Population, Housing and Employment Forecast

June 29, 2010

# Introduction

---

- The City of Barrie retained Watson & Associates Economists Ltd., Macaulay Shiomi Howson Ltd. and W. Scott Morgan & Associates Limited to prepare a long-term Growth Management Strategy (GMS) for the City to the year 2031.
- This study will form a critical background document for the City of Barrie as it moves forward with future development.
- The study has been organized into six phases.
- Phase 1 is the subject of this presentation.

# Background

---

- ❑ Based on strong population and employment growth over the past several decades, the Barrie's current urban area is now approaching build-out.
- ❑ If development is to continue, new and more innovative ways of accommodating higher density growth must be considered within the City's built-up areas.
- ❑ At the same time, new greenfield development on remaining designated areas and the new annexed lands must be planned and phased in a manner which supports the City's Official Plan.

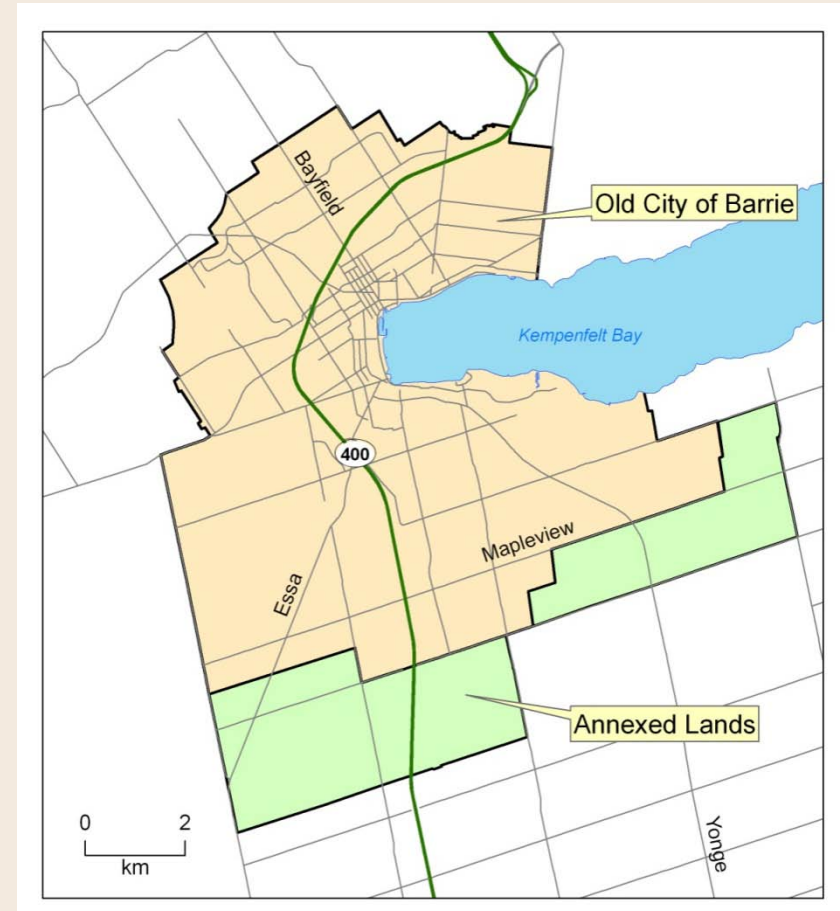
# Background

---

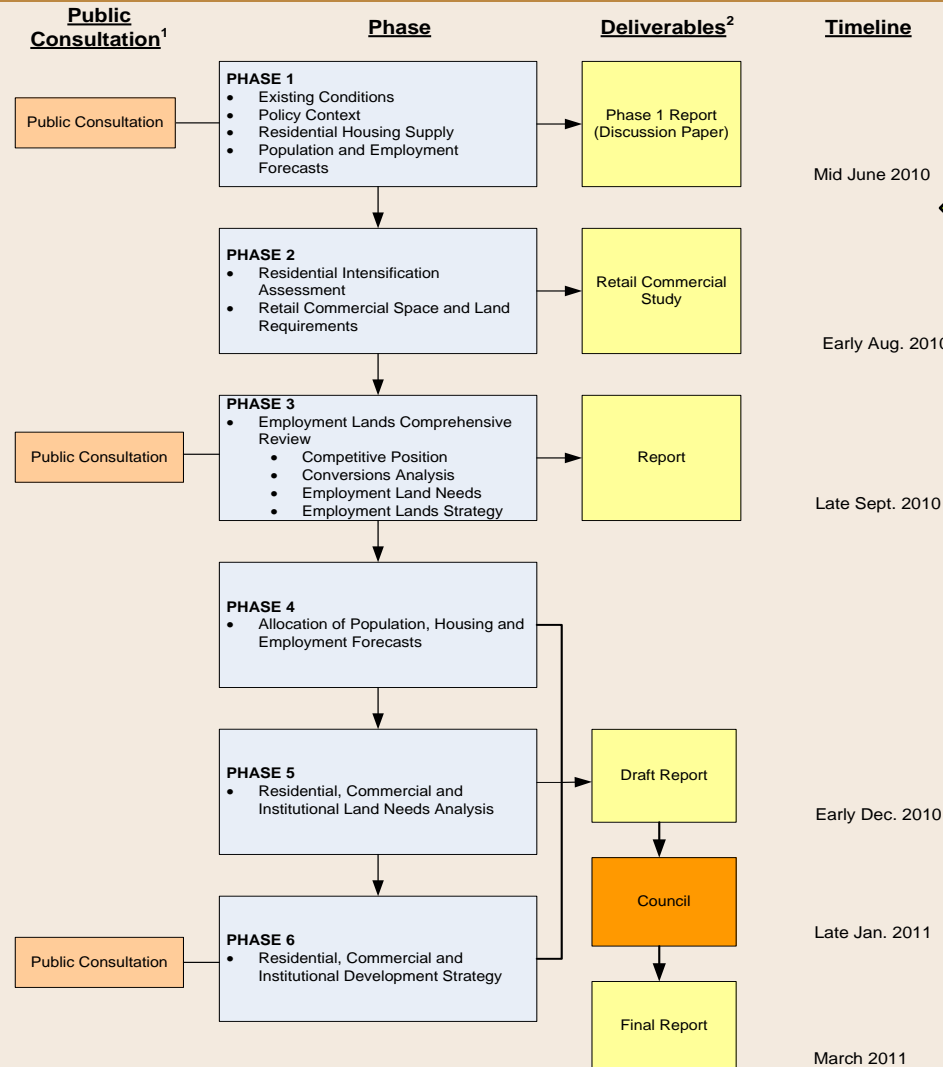
- ❑ At the Provincial level there are two key policy documents which shape the Province's vision for the City:
  1. The Growth Plan for the Greater Golden Horseshoe, 2006
  2. The Simcoe Area Vision for Growth Paper, 2009
- ❑ The Growth Plan establishes:
  - Downtown Barrie as the only Growth Centre (UGC) in the Simcoe Area.
  - By 2015 a minimum of 40% of all new development must be within the built-up area.
  - Minimum density requirements in the UGC and all greenfield lands, which will be addressed in Phase 4.
- ❑ The Simcoe Area Vision Report sets out a population and employment allocation of 210,000 persons and 101,000 jobs by 2031 for the City of Barrie.

# Background

- To ensure that Barrie fulfills its role as an anchor node in Central Ontario, the Province adjusted the City's urban boundary by adding 2,293 ha (5,700 acres) of land previously located within the Town of Innisfil.
- The City is now initiating the process of planning for the future growth to 2031 through a comprehensive Growth Management Strategy (GMS).



# Study Process



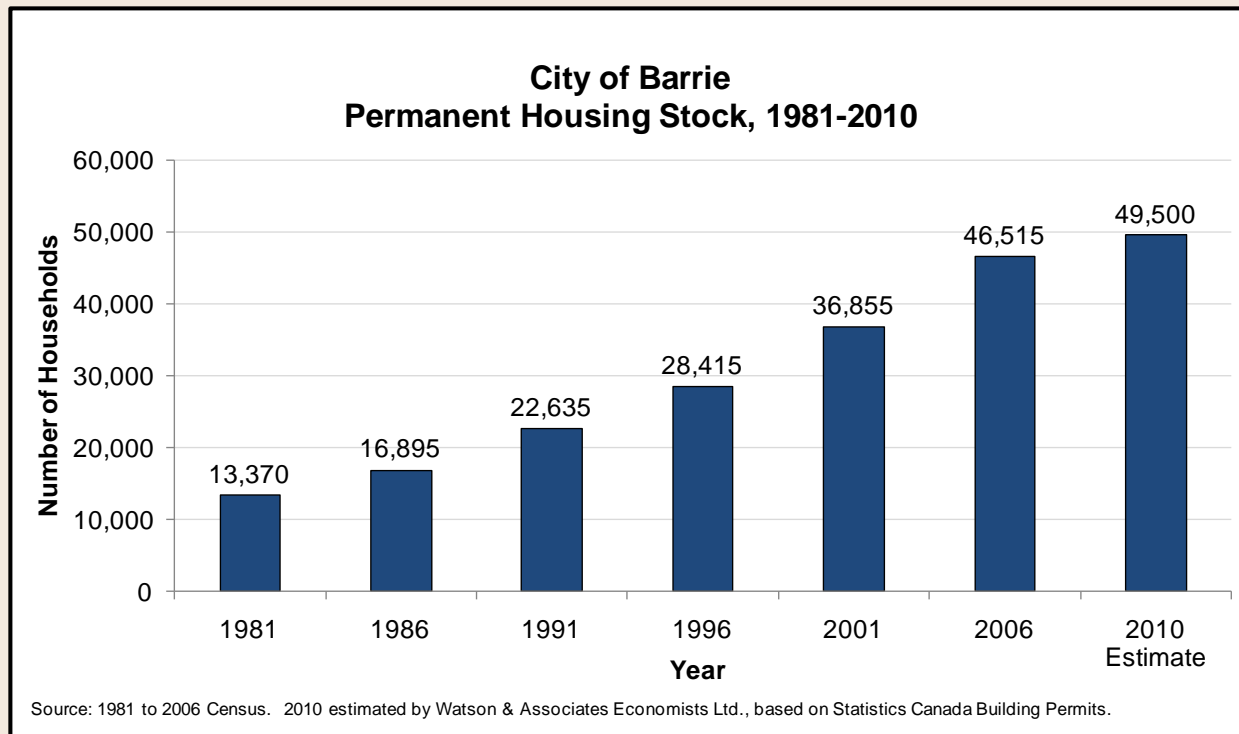
← We are here

<sup>1</sup> Meeting with Executive Management Team (EMT) and Senior Management Team (SMT) to be determined.

<sup>2</sup> Senior Management and City Council to be informed of key project findings at the end of each project phase through a staff report.



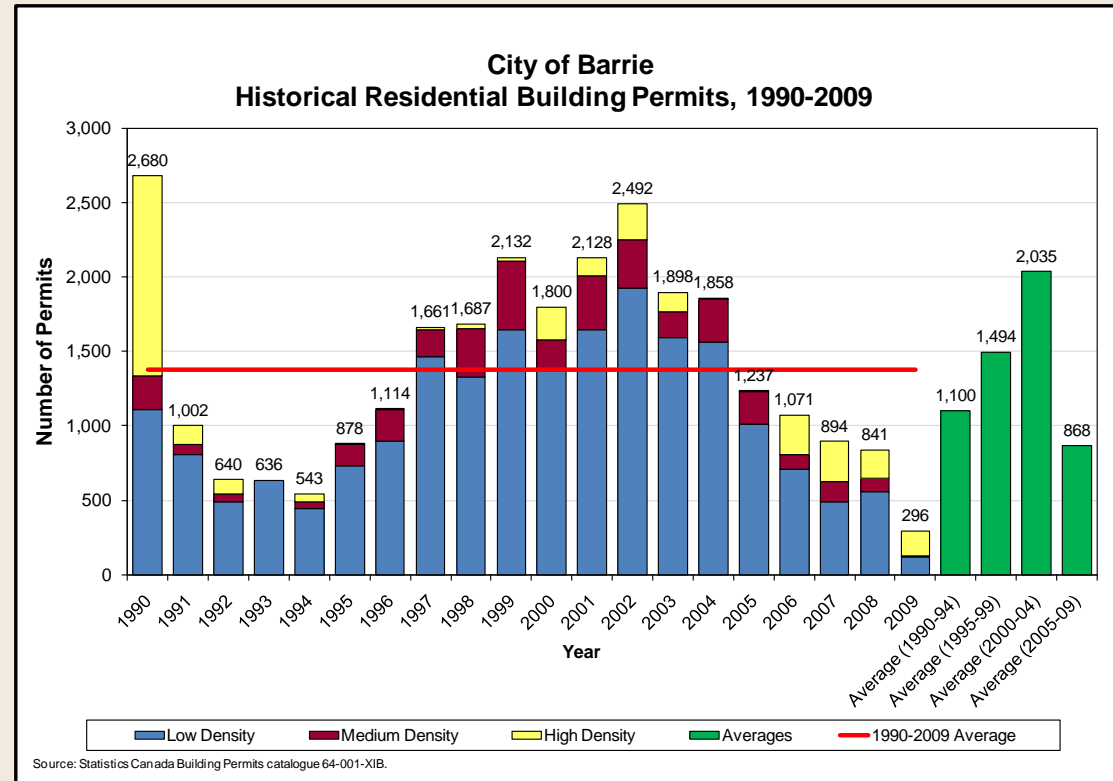
# Population, Housing & Demographic Trends - Historical Housing Growth



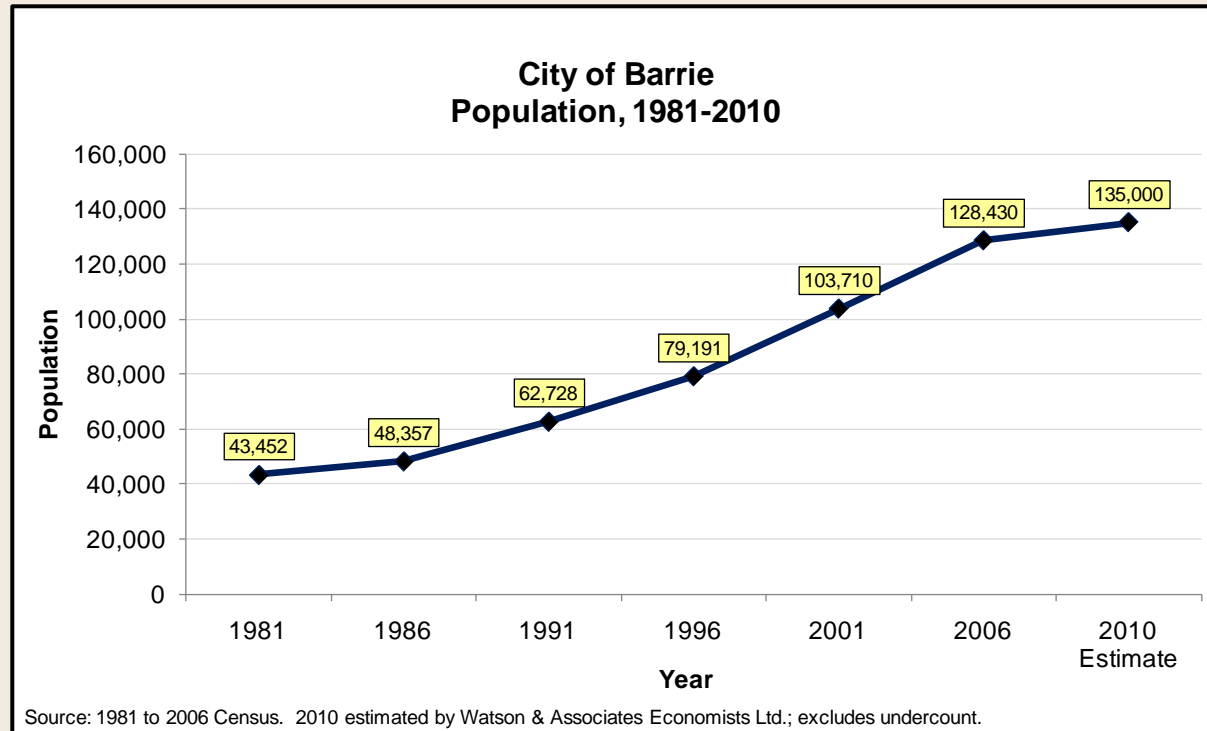
- Between 1981 and 2006, Barrie's housing growth rate was approximately three times higher than the provincial average.
- Approximately two-thirds of the existing housing stock consists of low density units (single family and semi-detached units).

# Population, Housing & Demographic Trends - Historical Residential Development

- Over the 1990-2009 period, City averaged approximately 1,400 residential building permits annually.
- Low density housing has accounted for three-quarters of units, however, this mix is gradually shifting to a greater share of medium/high density units.
- Recent slowdown in housing growth attributed to a number of factors tied to the economic recession and a decline in residential supply/market choice due to lack of vacant developable greenfield land.



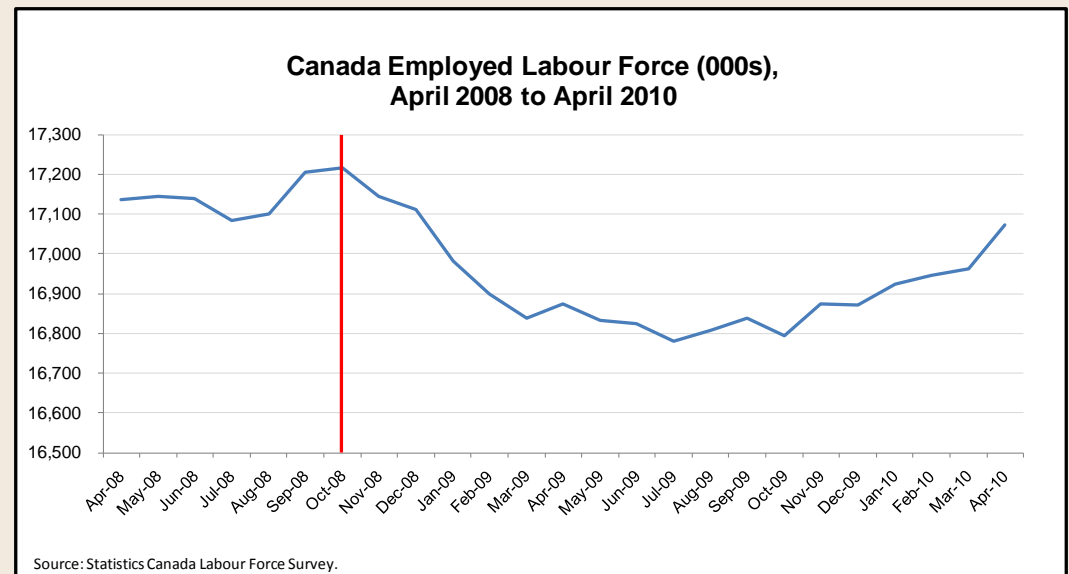
# Population, Housing & Demographic Trends - Historical Population Growth



- Between 1996-2006, Barrie was one of the fastest growing municipalities in Ontario with growth rates significantly higher than other municipalities in the Simcoe Area.
- Historically, Barrie's population growth has been driven largely by strong net migration of young families from the Greater Toronto + Hamilton Area (GTAH).

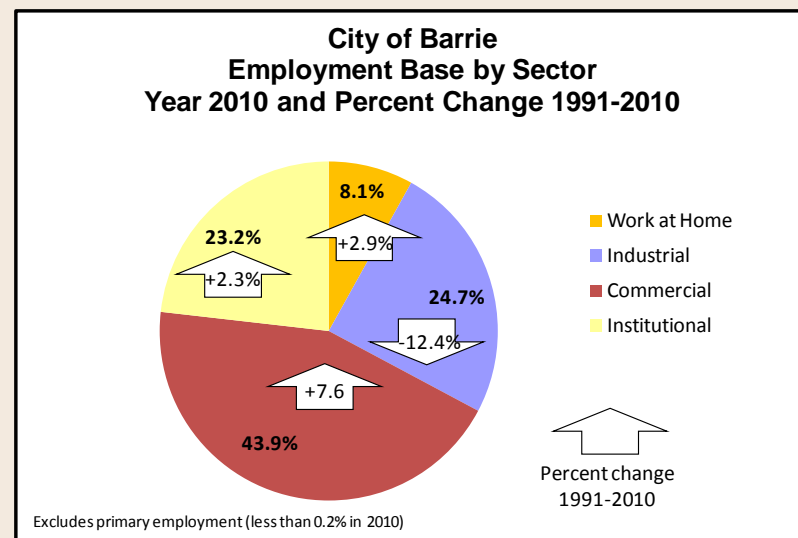
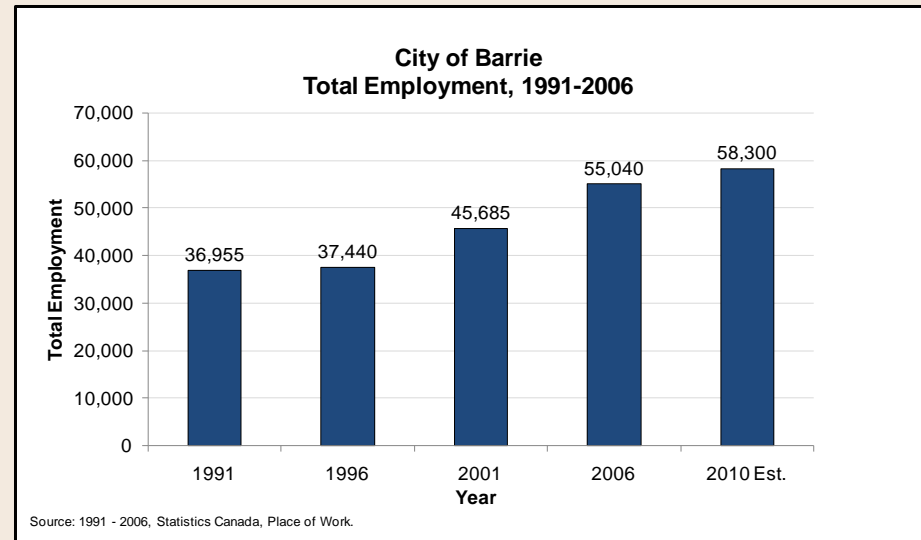
# Economic & Socio-Economic Trends - Macro Economy

- Currently global economy recovering from the worst economic downturn since the Great Depression.
- Recession impacted Ontario relatively hard;
- Canadian economy rebounding demonstrated by monthly labour force trends and improvement in unemployment rate.



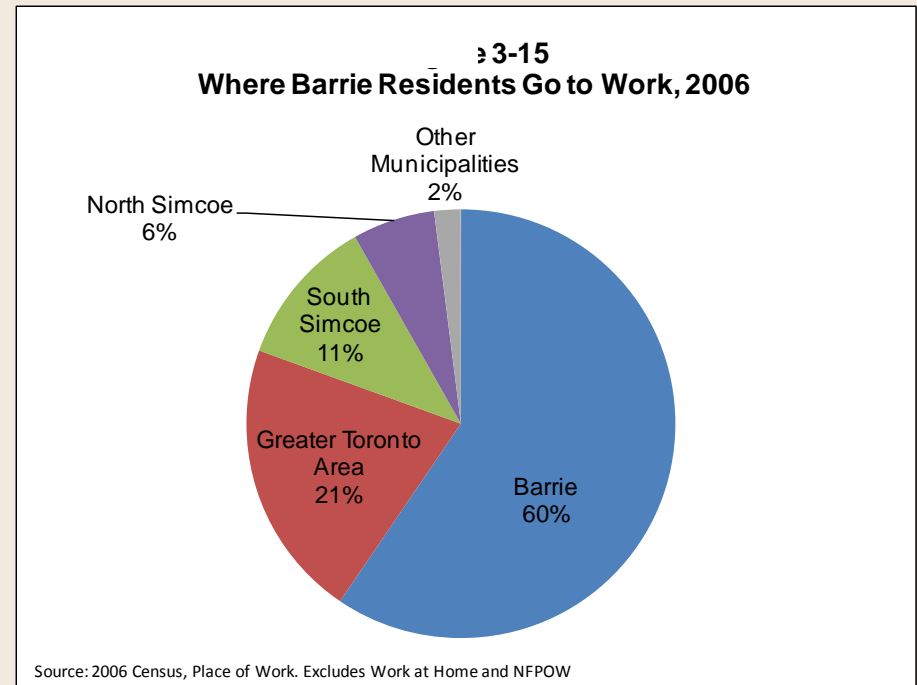
# Economic & Socio-Economic Trends - Historical Employment

- Barrie experienced strong employment growth between 1991 and 2006.
- Employment base gradually shifted from goods producing to service producing sector – greater share of commercial/institutional employment, lower share of industrial employment.
- Share of full-time employment has fallen.
- Since 2006, employment growth has slowed attributed to the recent economic recession.



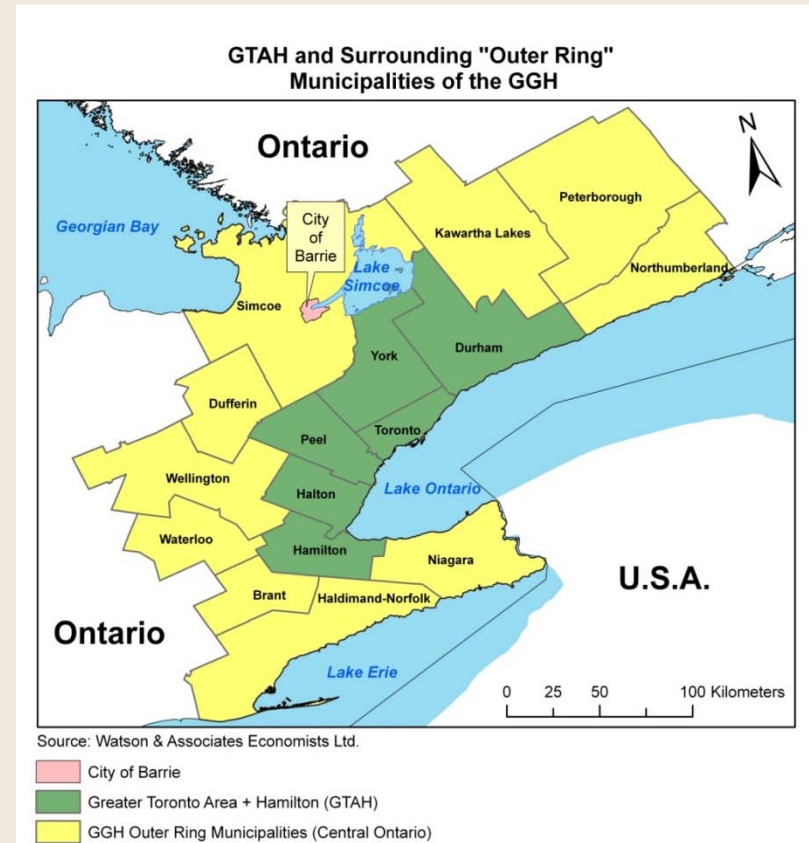
# Economic & Socio-Economic Trends - Commuting Patterns

- ❑ Barrie's employment base is not growing as fast as its labour force, with an increasing number of residents pursuing employment opportunities outside of the City.
- ❑ Though the City is moderately "self-contained," its live-work ratio is lower than many other comparable communities in the "Outer Ring" of the GGH.
- ❑ Of those residents working outside of Barrie, most commute to the GTAH for employment.



# Regional Growth Drivers

- The Greater Golden Horseshoe (GGH) is one of the fastest growing Cities/Regions in North America – strong population and employment growth forecast through to 2031.
  - Population forecast to increase from 7.8 million in 2001 to 11.5 million in 2031 – equivalent annual growth of a ‘new City of Barrie’
- The Simcoe Area is forecast to be one of the fastest growing upper tiers in the GGH - driven by net migration.
- 50% of GGH growth is expected to occur in the 55+ age group.



# Local Growth Drivers

---

- Barrie's Growing Importance as Regional Centre
  - Barrie's role as the largest urban centre in the region and primary service hub will continue to expand and evolve in retail trade, higher education and health services.
- Growth in the Advanced Manufacturing and "Knowledge-Based" Sectors
  - Barrie is well positioned to capitalize on the employment growth potential in the "knowledge-based" and "creative economy"
- Tourism/Four Season Recreation Opportunities
- Local Labour Force
- Business Competitiveness
- Regional Transportation Improvements
- Water and Wastewater Capacity

# Challenges to Growth

---

## □ Short to Medium Term

- Maintaining Balance Between Housing and Job Growth
- Timing of development of Annexed Lands
- Global economic recovery

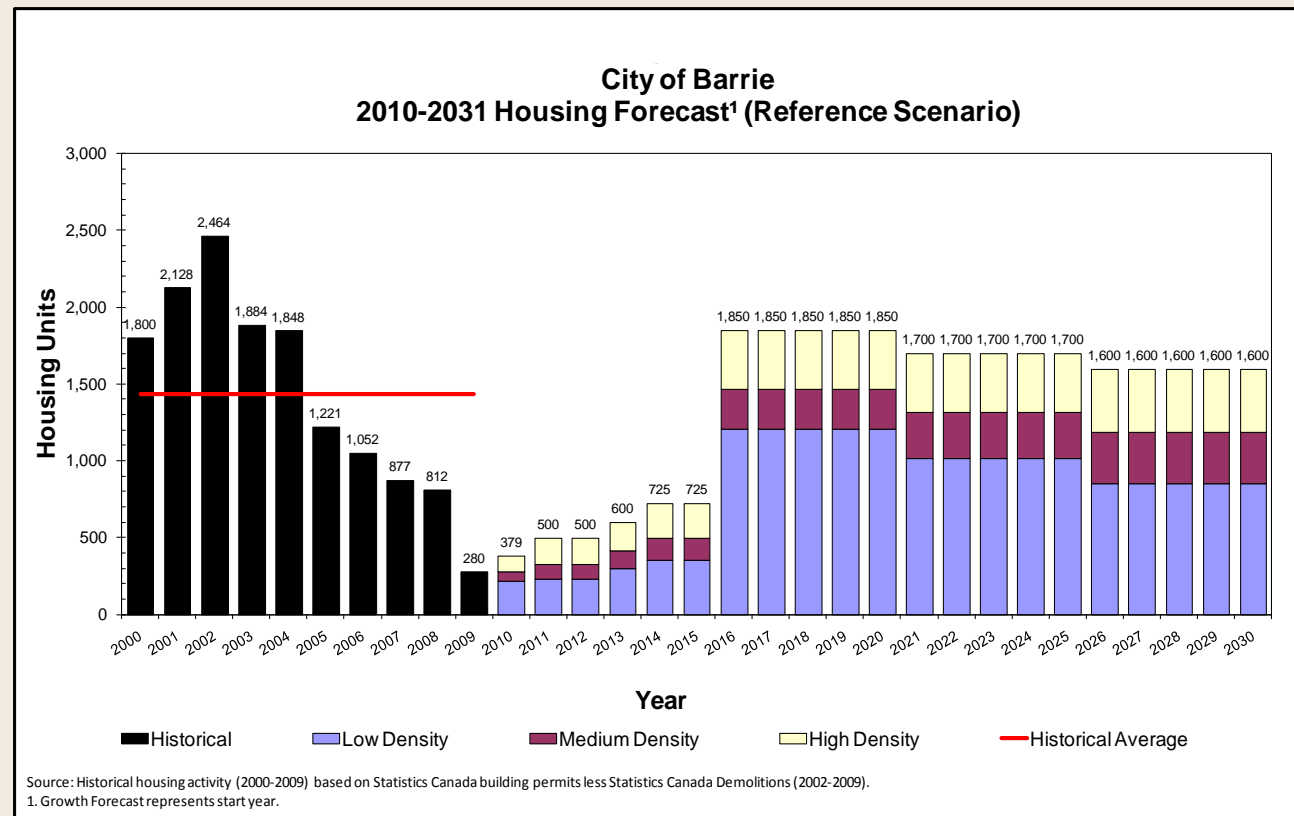
## □ Long-Term

- Growing Transportation Congestion (e.g. Highway 400)
- Diminishing GGH Population and Employment Growth
- Aging population and labour force

# Growth Forecast

## Population and Housing 2006-2031

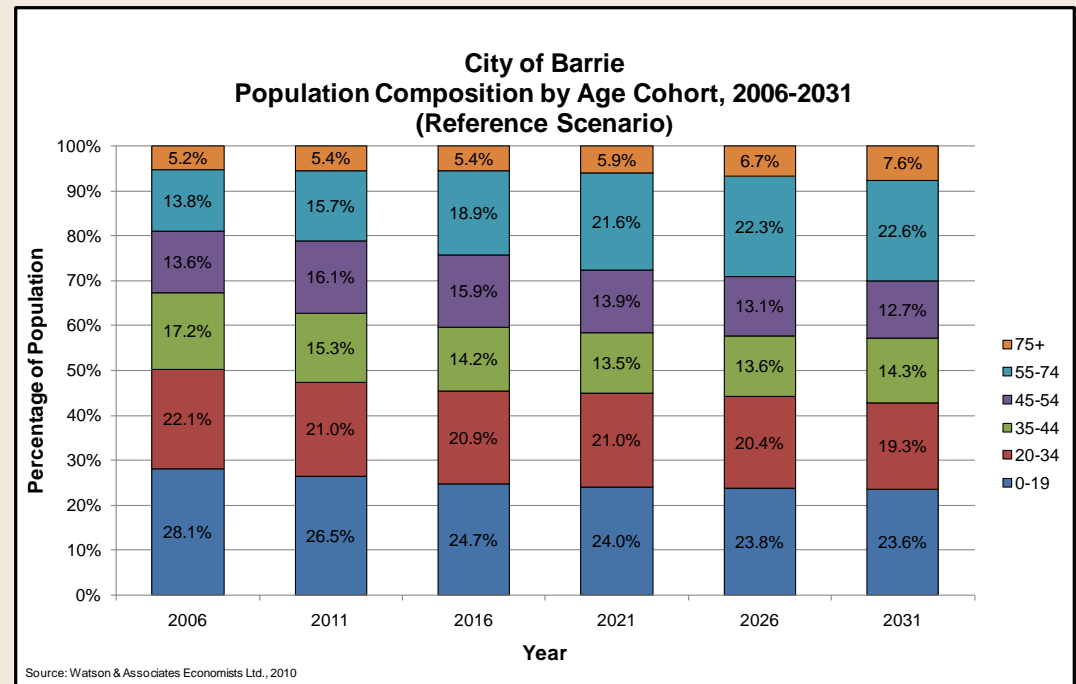
- Over the 2006-2031 period, Barrie's population is expected to increase from 133,700 to 210,000 under the Reference Scenario.
- An average of approximately 1,300 new housing units per year is required over the 2006-2031 period to achieve the population forecast.
- Population growth driven primarily by net migration of young families and 55+ age group.



# Growth Forecast

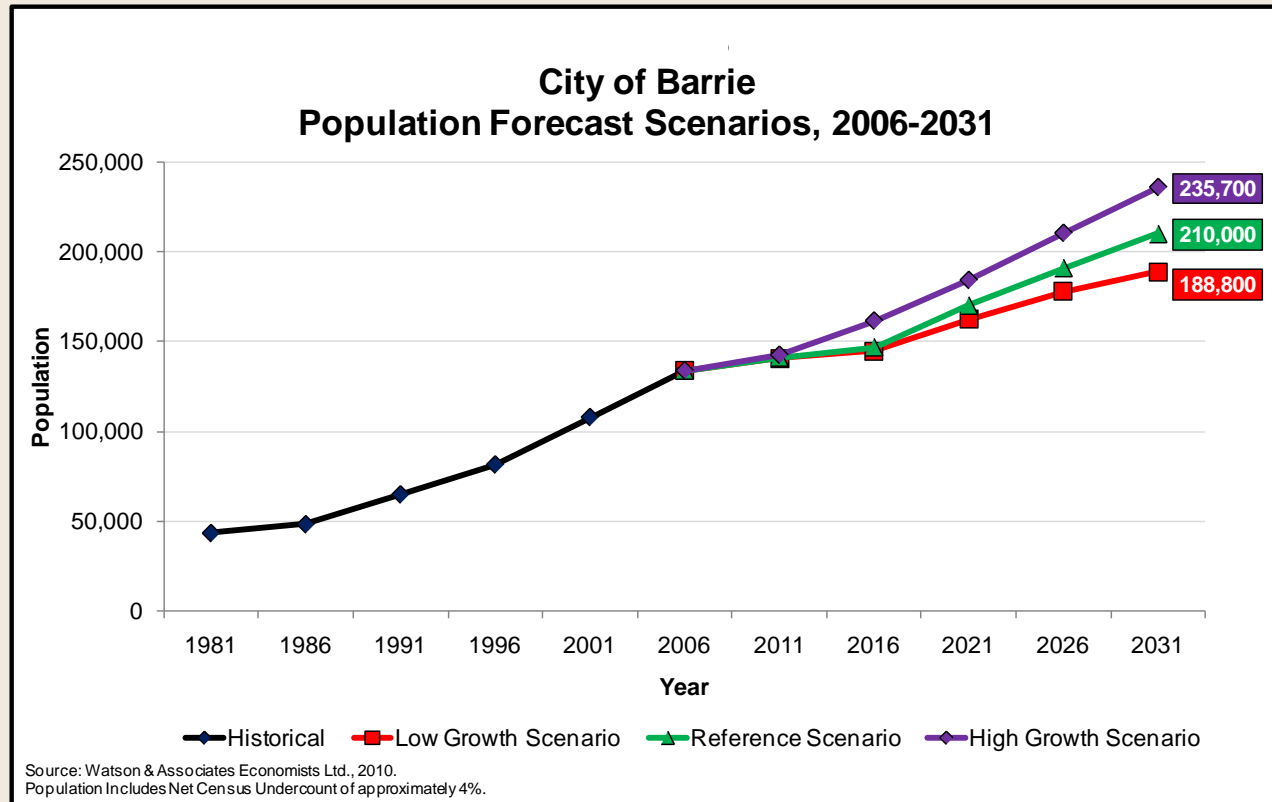
## Age Structure, 2006-2031

- Barrie's population will continue to age over the next 25 years.
- It is anticipated that the 55+ age group will represent 50% of Barrie's forecast population growth from 2006 to 2031 – driven by the “baby-boomers”.
- Anticipated net migration levels of young families not enough to offset aging trends.
- With the aging of the population, Barrie's average persons per dwelling unit (PPU) is expected to decline over forecast period.



# Growth Forecast

## High and Low Growth Scenarios

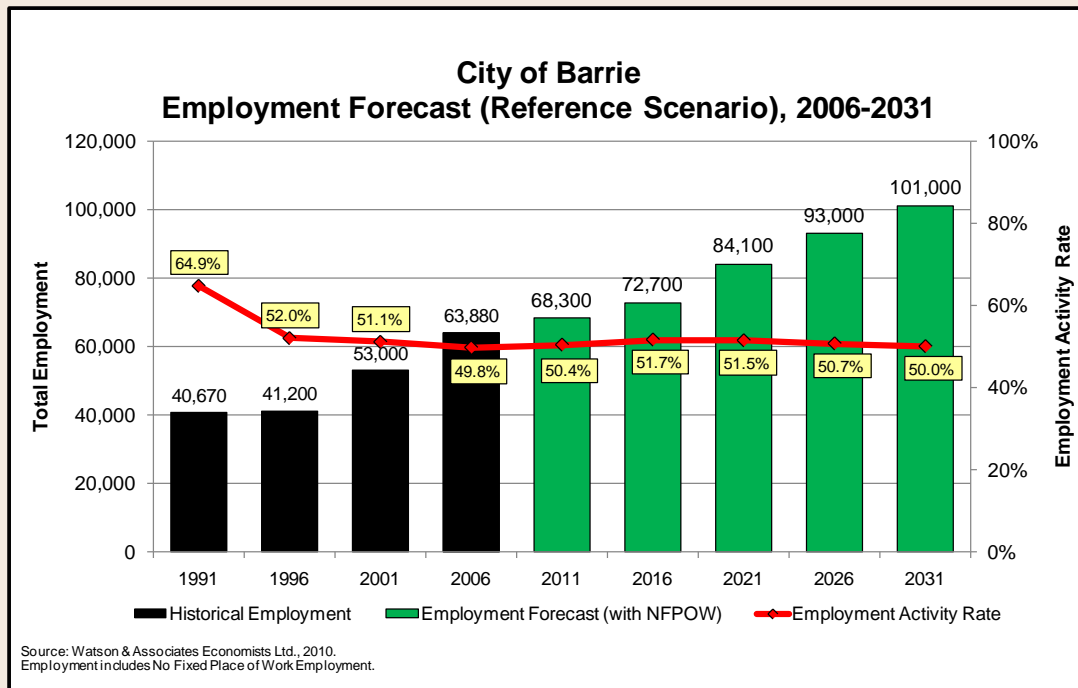


- Under the High Growth Scenario, Barrie's population would grow to 235,700 by 2031. In contrast, under the Low Growth Scenario, the City's population would increase to 188,800 by 2031.

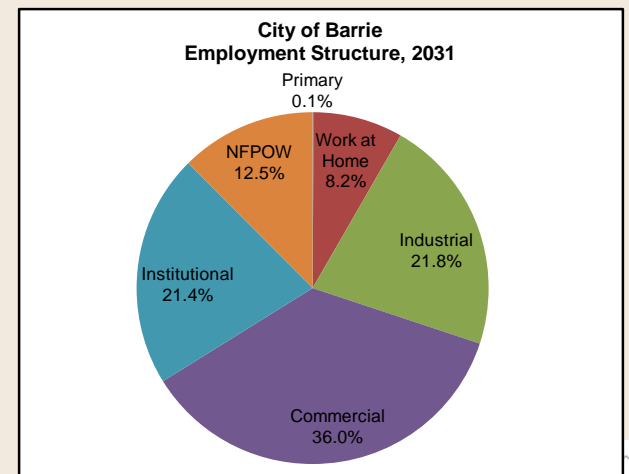
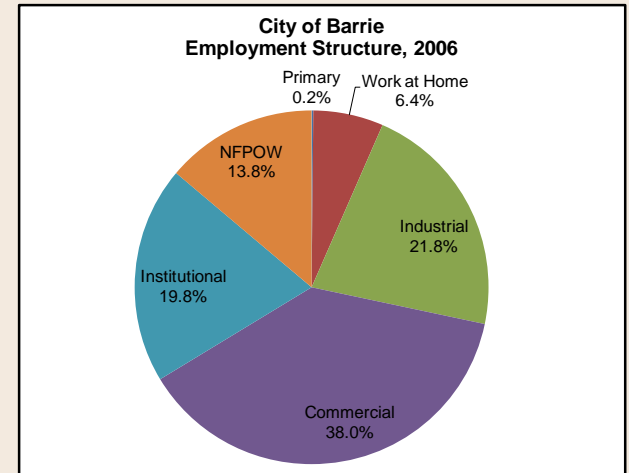


# Growth Forecast

## Employment Growth, 2006-2031



- Under the Reference Scenario, Barrie's employment base is expected to grow to 101,000 by 2031.



# Growth Forecast

## Industrial Employment Growth, 2006-2031

---

- ❑ Future industrial employment growth in Barrie is anticipated to total 8,095 over the 2006-2031 period.
- ❑ Employment growth led by advanced manufacturing, utilities and communications (led by the information and communications technology (ICT) sector), construction and warehousing/ distribution sectors.
  - ❑ Advanced manufacturing sector - growth will be led by firms that are part of existing regional and local economic clusters: manufacturing solutions, the automotive parts sector, plastics, health/medical equipment and consumer products, and packaging/paper board products.
  - ❑ Utilities and communications sector - ICT is a major component of this sector and a significant source of new employment opportunities in the new “knowledge-based” economy.
- ❑ Many sectors have established synergies with Georgian College and as they grow, their respective economic clusters will continue to evolve and expand.

# Growth Forecast

## Commercial/Institutional Employment Growth, 2006-2031

---

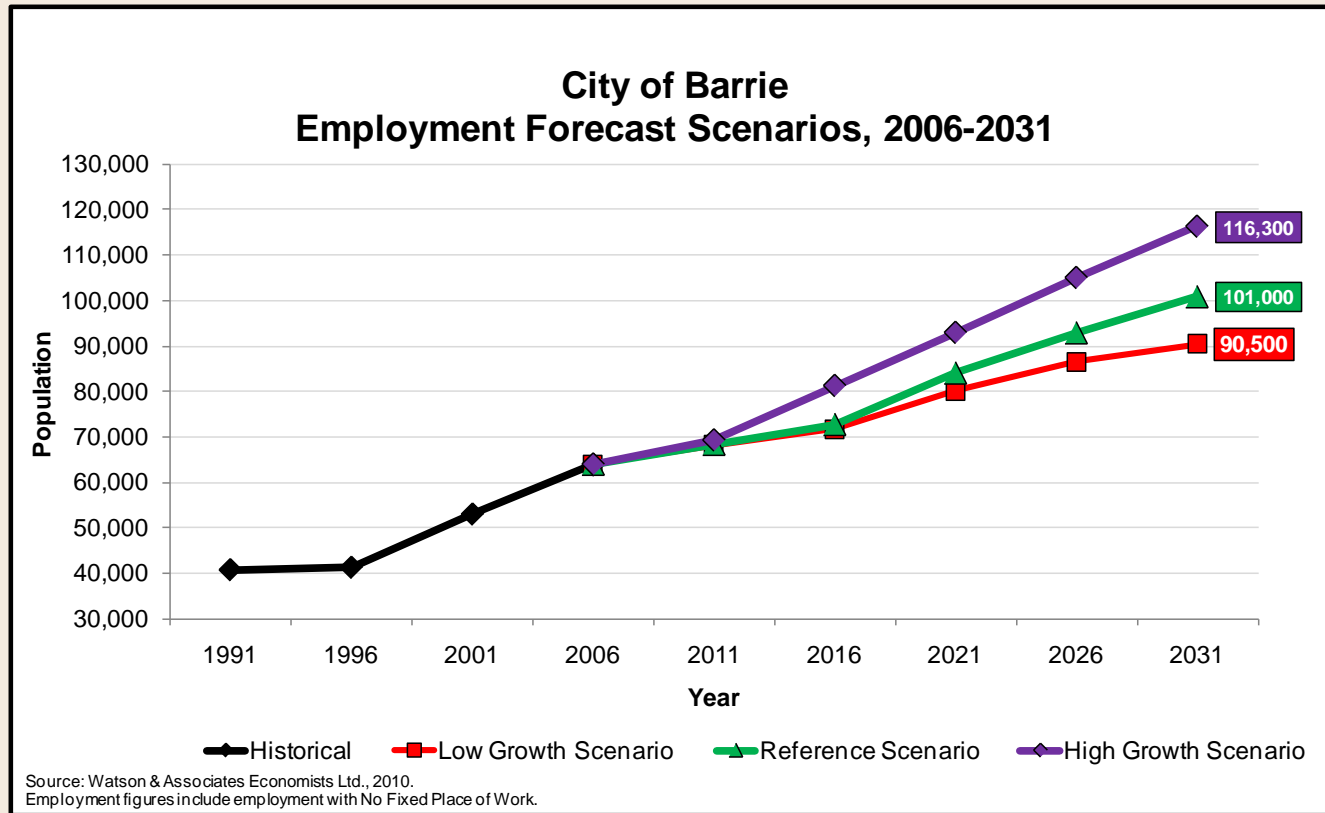
### Commercial Employment

- ❑ Barrie is a growing regional retail centre for Central Ontario, with a large trade area.
- ❑ The City is well positioned to continue to expand, attract and develop its tourism and recreational sector, which will further drive employment growth in the retail, food and accommodation sectors.
- ❑ Growth in business services, particularly in finance, insurance, real estate, driven by the 55+ age group.

### Institutional Employment

- ❑ Barrie is a growing centre for health services serving a large regional population. The health sector will experience expansion as the aging population will place increased demands on these services.
- ❑ The City's capacity for higher education is expected to expand significantly over the forecast period to meet the needs of the growing population base and employers who require an increasingly skilled labour force to fill jobs in the new "knowledge-based" and "creative" economy.

# Employment Growth Forecast, 2006-2031



- Under the High Growth Scenario and Low Growth Scenarios, Barrie's employment base would grow to 118,300 and 90,500, respectively by 2031



# Conclusions

---

## Population and Housing

- ❑ Over the past two decades Barrie has experienced tremendous growth and development which has transformed the City from a mid-sized community to a regional urban centre.
- ❑ Barrie's population growth has been driven primarily by net migration of young families from the GTA; attraction to Barrie is attributed partly to the City's wide market choice of competitively priced ground-oriented housing.
- ❑ Based on historical trends and regional and local growth drivers, Barrie is anticipated to experience strong housing and population growth over the next 20+ years.

# Conclusions

---

## Population and Housing (cont'd)

- ❑ Barrie's population is forecast to reach 210,000 by 2031 under the Reference Scenario, consistent with the Growth Plan. An average of approximately 1,300 new housing units per year is required over the 2006-2031 period to achieve the population forecast.
- ❑ Housing growth is anticipated to be relatively modest until the annexed lands are available for development in 2016.
- ❑ Barrie's housing market and associated net migration will be largely driven by young families with children and empty-nesters/seniors (55+ population).

# Conclusions

---

## Employment

- ❑ Barrie's employment base also experienced strong growth over the 1991-2006 period. Employment base has gradually shifted towards the institutional and commercial/population-related sector from the industrial sector.
- ❑ City's economy is highly oriented towards service-providing sectors including retail trade, accommodation and food services, education, health and social services.
- ❑ Employment growth has not kept pace with population growth - an increasing number of residents pursuing employment opportunities outside of the City.
- ❑ City of Barrie's total employment is forecast to increase to 101,000 in 2031.
- ❑ Employment growth will be concentrated in retail trade, higher education and health services. Barrie is also well positioned to expand and develop its tourism and four-season recreational opportunities. The City is also anticipated to see growth in the advanced manufacturing and "knowledge-based" sectors

## Next Steps

---

- Final Phase 1 Report to be released in mid-July 2010.
- Phase 2 – Commercial Land Needs Study to be released by the end of August 2010.

Thank You.  
Questions/Comments?