



# Official Plan Review

Northumberland County

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## Municipal Comprehensive Review – Long-Term Growth Forecast and Urban Land Needs Analysis

November 24, 2021

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In association with:



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## List of Acronyms and Abbreviations

| Acronym  | Full Description of Acronym                         |
|----------|---|
| B.E.C.N. | Business and Entrepreneurship Centre Northumberland |
| B.U.A.   | Built-up Area                                       |
| CN       | Canadian National                                   |
| COVID-19 | Coronavirus disease                                 |
| CP       | Canadian Pacific                                    |
| D.G.A.   | Designated Greenfield Area                          |
| E.L.E.   | Employment Lands Employment                         |
| G.D.P.   | Gross Domestic Product                              |
| G.G.H.   | Greater Golden Horseshoe                            |
| G.I.S.   | Geographic Information Systems                      |
| G.T.A.   | Greater Toronto Area                                |
| G.T.H.A. | Greater Toronto and Hamilton Area                   |
| ha       | hectare(s)  |
| L.N.A.   | Land Needs Assessment                               |
| L.Q.     | Location Quotient                                   |
| M.C.R.   | Municipal Comprehensive Review                      |



## List of Acronyms and Abbreviations (Cont'd)

|              |   |
|--------------|---|
| M.T.S.A.     | Major Transit Station Area                              |
| N.F.P.O.W.   | No Fixed Place of Work                                  |
| O.M.A.F.R.A. | Ontario Ministry of Agriculture, Food and Rural Affairs |
| O.P.         | Official Plan   |
| O.P.A.       | Official Plan Amendment                                 |
| P.M.I.       | Purchasing Managers' Index                              |
| P.P.S.       | Provincial Policy Statement                             |
| P.P.U.       | Persons Per Unit  |
| P.R.E.       | Population-Related Employment                           |
| P.S.E.Z.     | Provincially Significant Employment Zone                |
| S.G.A.       | Strategic Growth Area                                   |
| sq.ft.       | square foot/feet  |
| U.G.C.       | Urban Growth Centre                                     |
| V.P.N.       | Virtual Private Network                                 |
| W.H.O.       | World Health Organization                               |



# Executive Summary

As part of its Official Plan (O.P.) review exercise, Northumberland County is now embarking on a Municipal Comprehensive Review (M.C.R.) update, which requires an update of the County's long-term growth projections and urban land requirements. This process is required to bring the County's O.P. into conformity with the Growth Plan, 2019 (as amended), as well as to reflect current provincial policy direction and the County's strategic initiatives.<sup>[1]</sup> Integral to the County's O.P. is a detailed assessment of how new development will be planned, phased, and accommodated to the year 2051. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development.

Key components of this M.C.R. report include:

- Long-term population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by Urban and Rural Area, as well as by planning policy area;
- An analysis of urban Community Area land needs (to accommodate residential and population-related employment);
- An analysis of urban Employment Area land needs (to accommodate industrial-type employment); and
- A review and analysis of Employment Area conversion requests.

## Northumberland County Urban and Rural System

Northumberland County includes a blend of urban and rural communities. The Rural System includes lands that are protected from large-scale urban development. A key objective of the Rural System is to protect agriculture land, resources, and the natural environment, while encouraging economic and cultural activities that support the health and prosperity of rural communities, such as agriculture and tourism. A key objective of the Urban System is to direct growth where there is planned and existing infrastructure in a manner that supports principles of complete communities. Complete communities

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<sup>[1]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019. Office Consolidation 2020, Ontario.

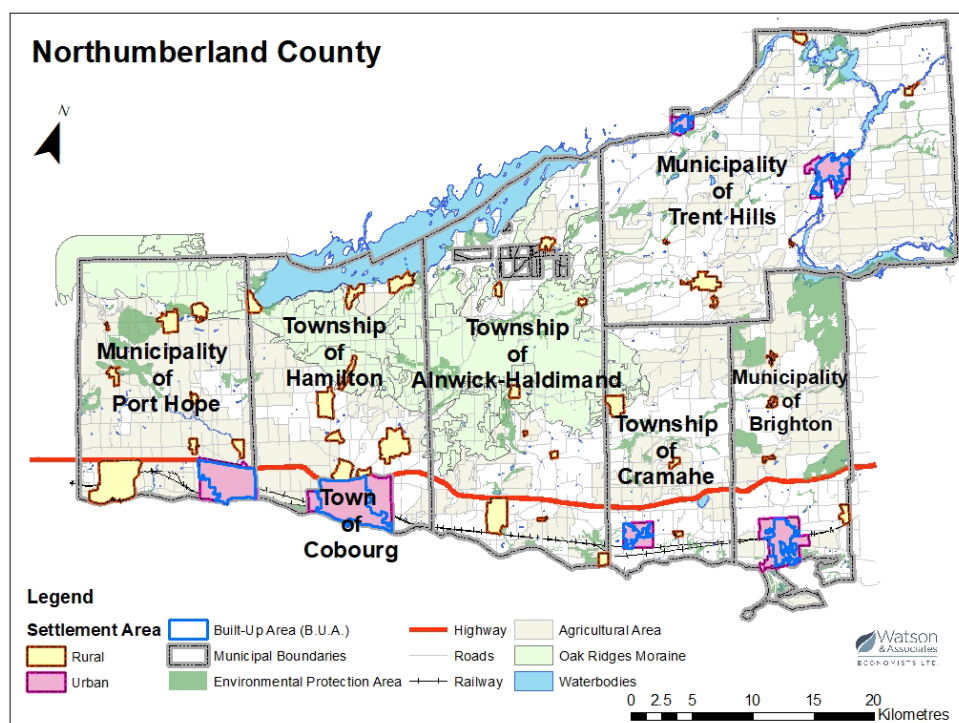




include a diverse mix of land uses that provide opportunities to live, shop and work in the same community.

The Growth Plan, 2019 requires that much of the forecast growth be allocated to the areas with full municipal servicing (water/wastewater), i.e., Urban Areas,<sup>[2]</sup> with the remainder of the growth allocated in the Rural Areas. In terms of a hierarchy, Urban Areas are considered a higher priority for growth than Hamlets<sup>[3]</sup> and the remaining rural area. The urban land needs assessment provided herein is based on fully serviced lands within the Urban Area. Figure ES-1 provides an illustration of the Urban and Rural Settlement Area structure.

Figure ES-1  
Northumberland County  
Settlement Area Classification



Source: Derived from Northumberland County Official Plan (2016).

<sup>[2]</sup> Urban Settlement Areas include Cobourg, Port Hope, Campbellford, Hastings, Brighton and Colborne.

<sup>[3]</sup> Rural Settlement Areas include Hamlets or similar small settlements that are serviced by private water onsite and/or by private wastewater systems.



## **Northumberland County Population and Employment Growth Outlook to 2051**

It is important to recognize that future population and employment growth within Northumberland County is strongly correlated with the growth outlook and competitiveness of the economy within the County and the surrounding region – which in this case is largely represented by the Greater Golden Horseshoe (G.G.H.). The G.G.H. represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents a portion of the commuter-shed for Northumberland County. Potential employment opportunities within the County and the surrounding commuter-shed represent the primary driver of net migration and housing growth to this area.

The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of approximately 5.3 million people (153,000 annually), or 1.3% annually between 2016 and 2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase from 4.6 million in 2016 to 7.0 million in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051.

The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The industrial and office commercial real estate markets within the G.G.H. are significant, having the third and sixth largest inventories, respectively, in North America.

With a robust economy and diverse mix of export-based employment sectors, the G.G.H. is highly attractive on an international level to new businesses and investors. The G.G.H. also has a strong appeal given the area's regional infrastructure (i.e., Toronto Pearson International Airport, other regional airports, provincial highways, inter-modal facilities), access to labour force, post-secondary institutions, and proximity to the U.S. border. In turn, this continues to support steady population and housing growth within the G.G.H., largely driven by international and inter-provincial net migration to this region.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. As illustrated in Figure ES-2, due to its geographic location within the eastern region of the G.G.H. Outer Ring, Northumberland County is forecast to experience significant outward growth pressure over the next several decades largely



from the eastern and northern Greater Toronto and Hamilton Area (G.T.H.A.) upper-tier municipalities, which have historically been amongst the fastest growing municipalities in Ontario in recent decades.

The County's urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. For Northumberland County, the coronavirus disease (COVID-19) pandemic has acted as a near-term driver of housing demand, led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade "city lifestyles" for "smaller town living." It is recognized, however, that the longer-term population and employment growth potential for the County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in Northumberland County over the long term.

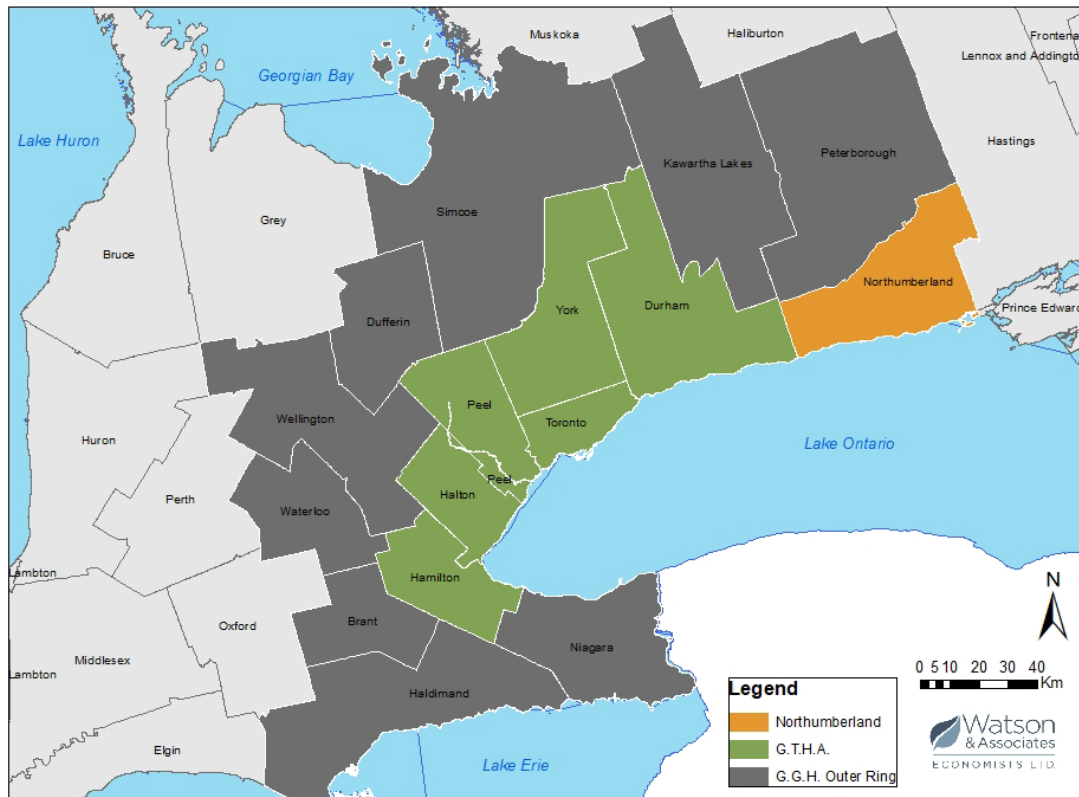
Over the past decade, the County has experienced employment growth across a broad range of sectors, including finance and insurance, health care and social assistance, professional, scientific and technical services, wholesale trade as well as transportation and warehousing. The County's employment base is also highly concentrated in the tourism industry, with the majority of employment in this sector concentrated in retail trade as well as accommodation and food services businesses, of which many are oriented towards small businesses and home-based occupations. Lastly, the agriculture sector also has a relatively high concentration in the County and is anticipated to experience moderate employment growth over the next several years.

To varying degrees, the County's established and emerging employment sectors are all anticipated to experience employment growth consistent with the relatively strong long-term economic outlook for the broader economy. As the employment base continues to grow within the County and the surrounding commuter-shed, the economy is also anticipated to diversify, generating a range of new live/work and commuting opportunities that increasingly focus on emerging knowledge-based employment sectors. As the local employment base and economy within the surrounding commuter-shed continue to grow, Northumberland County will continue to be a desirable location for workers to live, leading to steady population growth across the County. Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated in neighbouring municipalities within the G.G.H. As such, raising the economic profile of Northumberland County by leveraging



the economic opportunities and strengths of the broader G.G.H. regional economy is recommended as a key long-term economic development strategy for the County.

Figure ES-2  
Northumberland County within the Context of the Greater Golden Horseshoe (G.G.H.)



Source: Watson & Associates Economists Ltd., 2021.

Figure ES-3 summarizes Northumberland County's total population growth forecast over the 2016 to 2051 forecast period relative to historical population between 2001 and 2016. By 2051, the County's total population base is forecast to grow to approximately 122,000. This represents an increase of approximately 34,400 persons between 2016 and 2051, or an average annual population growth rate of 1.0% during this period. Based on the review of the County's long-term growth outlook provided in this report, the 2051 population and employment forecast, as set out in Schedule 3 of the Growth Plan, is the recommended long-term growth scenario for Northumberland County. The Schedule 3 Growth Plan forecast for Northumberland County:

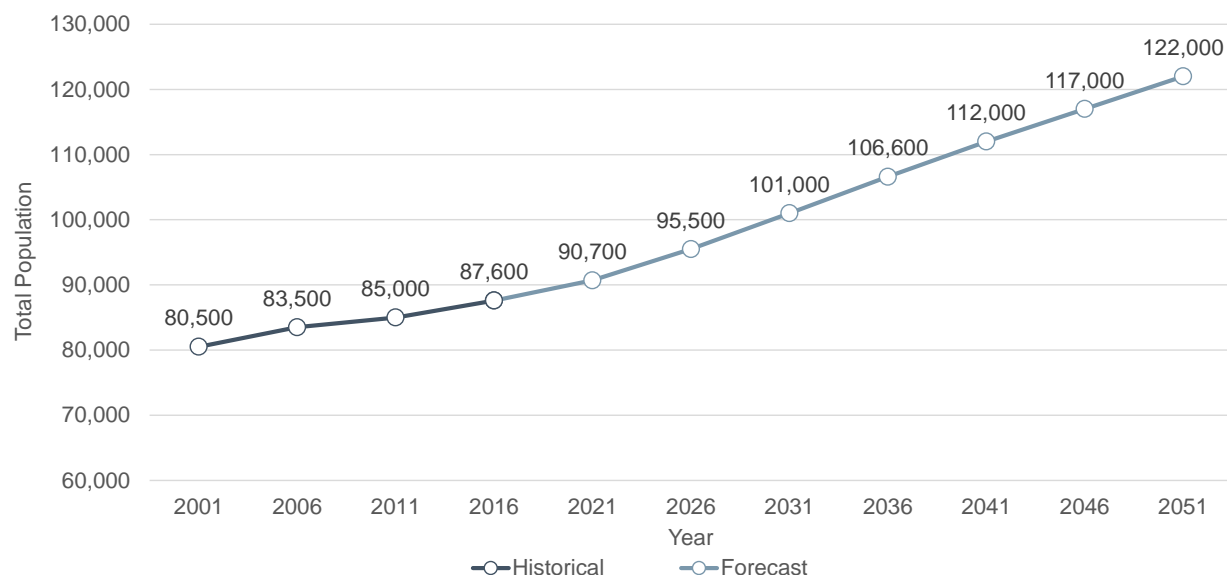
- Represents a reasonable increase in long-term population and employment growth relative to historical trends;



- Accurately identifies the anticipated influence of identified regional and local growth drivers on future development trends across the County; and
- Represents a reasonable increase in the share of total population and employment in Northumberland County relative to the G.G.H. Outer Ring as a whole.

As such, a higher long-term population forecast for Northumberland County is not supported for the purposes of long-term growth management and urban land needs analysis.

Figure ES-3  
Northumberland County  
Population Growth Forecast to 2051



Note: Population figures include a net Census undercount estimated at approximately 2.3%.  
Source: Historical 2001 to 2016 figures from Statistics Canada Table 17-10-0140-01, 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

To accommodate the long-term population forecast, the County will require approximately 15,000 additional new households to be constructed over the next 30 years, or just over 500 new households annually, which is approximately 23% higher than the average level of 405 new housing units which was achieved from 2001 to 2021. It is anticipated that a large component of housing growth will include low-density housing; however, increasing demand is also anticipated for medium-density and high-





density housing forms to provide greater choice in housing options by type and tenure for a broad range of residents by age and income.

Addressing the interconnection between the County's competitive economic position and its longer-term housing needs by market segment is critical in realizing the County's future forecast population and employment growth potential, as well as the County's ultimate goals related to prosperity, opportunity, and livability. This approach recognizes that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. To ensure that economic growth is not constrained by future labour shortages, effort will be required by Northumberland County to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

It is important to recognize that while the County's population base is growing, it is also getting older. Between 2016 and 2051, the 75+ age group is forecast to represent the fastest growing population age group, with an average annual population growth rate of 2.8%. With an aging population, the County will be more reliant on net migration as a source of population as opposed to natural increase. With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density forms, including seniors' housing and affordable housing options. Northumberland County is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.

### **Northumberland County Population Growth Allocations, 2016 to 2051**

Over the forecast horizon, it is anticipated that the County's Urban Areas, Hamlets and remaining rural areas will all continue to experience housing growth; however, growth will not be uniform throughout the County. More specifically, the Town of Cobourg and the Municipality of Port Hope are expected to account for more than half the County's overall population growth.



It is anticipated that the County will become increasingly more urban over the forecast horizon. As of 2016, approximately 53% of the County's population is within the Urban Areas, while the remaining 47% of the County's population is within Hamlets and Villages and the remaining rural area. Looking forward, it is anticipated that by 2051, approximately 62% of the County's population base will be concentrated within Urban Areas. As such, the County's Urban Areas will play an increasing role in broadening future housing options available within the County with respect to housing by structure type.

It is also recognized that the County's Hamlets and Rural Areas also have a role to play in accommodating future development subject to available land supply, supporting infrastructure and scale of development. The County's Hamlet Areas represent service centres to the surrounding Rural Area and provide clusters of business operations that are essential to the County's future economic growth. As such, infilling and minor rounding out of existing development within Hamlet Areas is important to ensure that these areas remain vibrant, sustainable and complete communities. While provincial, County and local planning policies direct development to fully serviced Urban Areas, it is important to note that 13% of the County's housing growth, representing approximately 2,000 permanent housing units, has been allocated to the County's Rural System.<sup>[4]</sup>

## **Provincial L.N.A. Methodology**

The Province of Ontario issued the final Land Needs Assessment (L.N.A.) methodology on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.<sup>[5]</sup> The L.N.A. methodology focuses on an outcome-based approach to long-term urban land needs within the G.G.H. Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019 and other relevant provincial documents, to assess the quantity of land required to accommodate forecast growth. The L.N.A. methodology identifies that the results of an L.N.A. can only be implemented through an M.C.R.

In accordance with the provincial L.N.A. methodology, urban land needs are to be assessed across two different areas within the urban system including **Community**

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<sup>[4]</sup> As measured between 2022 and 2051.

<sup>[5]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



**Areas and Employment Areas.** It is important to recognize that the provincial L.N.A. methodology focuses on the urban system, where there are settlement areas with municipal servicing and urban amenities that support the growth management policies of the Growth Plan, 2019.

Provided below is a summary of the two areas that are reviewed for land requirements.

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

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

### **Recommended Residential Intensification Target**

The current Northumberland O.P. has identified an intensification target of 40%. The results of this M.C.R. identify that this target is not considered to be realistic based on historical development trends and anticipated demand for housing within the built-up areas (B.U.A.) across the County. During the 2022 to 2051 planning horizon, a 17% County-wide residential intensification target is recommended as an alternative intensification target for Northumberland County.

Within the County, Cobourg and Port Hope provide the greatest opportunity to accommodate a wide range of housing options (low, medium, and high density) within the B.U.A. Market demand for residential intensification is considered to be modest throughout the County’s remaining Urban Areas.

### **Employment Area Conversions**

Changes to a site designated in the County’s or local municipality’s O.P. as “Employment” to allow for uses not permitted in the designation, including residential, mixed use and specific commercial uses, is considered an Employment Area land conversion. The Growth Plan, 2019 and the P.P.S, 2020 provide a framework for



assessing the conversion of lands within Employment Areas. As part of this M.C.R. process, County principles regarding the protection and management of Employment Areas as well as localized criteria have also been established to comprehensively review the County's Employment Areas within the context of local site conditions and evolving market trends.

In total, eight Employment Area conversion requests have been reviewed and evaluated on a site-by-site basis.<sup>[6]</sup> Based on this review, a series of recommendations have been made with respect to each Urban Employment Area conversion request which is detailed in Chapter 6 and Appendix K, herein.

### **Employment Area Analysis and Urban Employment Area Land Needs**

As previously noted, the long-term economic outlook for the County is very positive. As the local employment base and economy within the surrounding commuter-shed continues to grow, Northumberland County will remain a desirable location for workers to live, leading to steady population and population-related employment growth across the County.

In accordance with Schedule 3 of the Growth Plan, 2019, Northumberland County's employment base is forecast to reach 44,000 jobs by 2051. Based on the County's current employment base of 32,370 jobs as of 2021 and the Growth Plan, 2019 forecast of 44,000 jobs by 2051, Northumberland County is forecast to add approximately 11,600 jobs, which represents an annual growth rate of approximately 1.0%.

By 2051, Northumberland County is forecast to accommodate approximately 14,400 total jobs within its Urban Employment Areas at an average density of 20 jobs per hectare (ha). To accommodate forecast demand in Employment Areas, the County will require an additional **145 gross ha** of designated urban Employment Area Lands within the Town of Cobourg, the Municipality of Port Hope, and the Urban Area of Campbellford.<sup>[7]</sup> It is also important to acknowledge that Urban Employment Area surpluses have been identified for the Urban Areas of Brighton and Colborne by 2051.

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<sup>[6]</sup> Refer to subsections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.

<sup>[7]</sup> Gross land requirements exclude land associated with the County's natural heritage system.



As part of the County's Official Plan Amendment (O.P.A.) process, further consideration will be given to location options for Urban Employment Area expansion for municipalities in which a localized need has been identified. Market potential for Employment Area development within Northumberland County is anticipated to be strongest for large, contiguous sites that are situated within close proximity to the Highway 401 corridor within the Town of Cobourg and the Municipality of Port Hope. Lands that offer direct Highway 401 access and exposure are anticipated to be highly marketable for prestige industrial type uses over the long term. Cobourg and Port Hope also offer the widest range of potential housing opportunities, urban amenities, and municipal services to attract a growing local labour force necessary to address employment demand within existing and developing Employment Areas. As such, in addressing the County's long-term Urban Employment Areas needs, it is not appropriate to assume that land surpluses within Brighton and Colborne can be used to off-set land shortfalls within Cobourg, Port Hope and Campbellford.

### **Community Area Land Needs Assessment**

In accordance with the requirements of the L.N.A., a Community Area designated greenfield area (D.G.A.) urban needs analysis has been carried out for each of the County's Urban Settlement Areas (refer to Appendix H). At the County-wide level, Northumberland is forecast to have a surplus of approximately 409 ha to accommodate forecast D.G.A. Community Area land needs to the year 2051. Notwithstanding this identified County-wide Community Area surplus, the results of this M.C.R. indicate that long-term Community Area urban land needs vary significantly by Urban Settlement Area. More specifically, the Town of Cobourg, and the Urban Areas of Campbellford, Brighton and Colborne are all identified to have Community Area surpluses by the year 2051. On the other hand, the Urban Area of Hastings has a sufficient supply of D.G.A. Community Area lands, **while a Community Area shortfall of 131 ha has been identified for the Municipality of Port Hope.** In accordance with the results of this M.C.R., an urban boundary expansion of 131 gross ha is recommended within the Municipality of Port Hope to accommodate identified Community Area land needs to the year 2051 within this area of the County.

### **Excess Lands**

An objective of the Northumberland County M.C.R. is to address localized urban land needs while at the same time not exacerbating the total Community Area D.G.A. land





surplus identified across the County to the year 2051. By identifying excess urban lands within the County, it is the County's intention to expand the urban boundary of Port Hope to address the localized Community Area D.G.A. land needs for this area.

In accordance with the policies of the Growth Plan, 2019, the County of Northumberland has consulted extensively with each of the local municipalities within the County to identify potential excess lands at the parcel level. In total, **110 ha of excess Community Area lands have been identified across the Urban Areas of Cobourg, Campbellford and Brighton.** These lands have been identified in an effort to direct future urban development to locations where an urban development need has been identified and prohibit development in other urban locations that are not anticipated to be needed for urban development over the planning horizon of the County's O.P. The specific location of these parcels are summarized in subsection 7.3. herein.

It should be recognized that identified excess lands will be subsequently reviewed within ten years at the time of the County's next M.C.R. During this subsequent M.C.R., some of the County's excess lands may be required for urban development and re-introduced into the developable D.G.A. Community Area inventory.



# 1. Introduction

## 1.1 Study Purpose and Process

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Northumberland County retained Meridian Planning, in association with Watson & Associates Economists Ltd. (Watson), in mid-2020 to prepare the growth-related technical requirements of its Municipal Comprehensive Review (M.C.R.) and to provide the County with strategic recommendations to support the development of updated policies to the County's Official Plan (O.P.). The process of preparing an update to the County's O.P. represents an M.C.R. in accordance with section 26 of the *Planning Act*, R.S.O. 1990, c. P.13.

The M.C.R. technical reporting has been organized into one report which addresses the County-wide growth forecasts, growth allocations by local municipality as well as an assessment of long-term urban land needs to the year 2051. Key components of this report include:

- Review of the community structure within the context of provincial and local planning policy;
- Long-term population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by Urban Settlement Area and Rural Area;
- Residential intensification assessment;
- Employment analysis and Employment Area land needs assessment, including an Employment Area conversion review; and
- Community Area land needs assessment.

## 1.2 Background

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An M.C.R. is used to establish a long-term vision and planning framework for a municipality that fosters a sustainable approach to future residential growth and economic development. An M.C.R. examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon. For municipalities located within the Greater Golden Horseshoe (G.G.H.), the long-term planning horizon is the year 2051.



An M.C.R. is described as the process of bringing an O.P. up to date and in conformity with key parts of A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (as amended, Office Consolidation 2020), hereinafter referred to as the Growth Plan, 2019. In accordance with the Growth Plan, 2019, an M.C.R. is defined as:

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

This process is specific to municipalities within the G.G.H. and is associated with its own deadline of July 1, 2022. The results of the M.C.R. will assist staff in preparing amendments to the policies and maps in the County's O.P. for consideration by Municipal Council. By completing the M.C.R., County staff will align the O.P. policies with the Growth Plan, 2019.



## 2. Policy Context

This chapter provides an overview of the relevant provincial and County policies that apply to long-term growth management in Northumberland. These policies provide the framework for the analysis presented herein.

### 2.1 Provincial Policy Context

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#### 2.1.1 *Provincial Policy Statement, 2020*

The Provincial Policy Statement, 2020 (P.P.S., 2020) provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions “shall be consistent with” the P.P.S., 2020 (*Planning Act*, R.S.O. 1990, c. P. 13 s. 3).

The P.P.S., 2020 came into effect on May 1, 2020.<sup>[8]</sup> Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land-use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019) and the on-going updates to the Growth Plan, 2019. Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and to reduce barriers and costs to the land-use planning system in order to provide greater predictability.

A significant change of the P.P.S., 2020 with regard to housing policy is the provision of a housing option approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (Policy 1.4.3). Providing for housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

“A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-

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<sup>[8]</sup> Provincial Policy Statement, 2020 – Under the *Planning Act*. Ontario.



ownership housing, co-operative housing, community land trusts, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.”

Throughout the P.P.S., 2020, there is strong encouragement to consider the market when addressing planning matters such as managing growth, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms that they have not historically had considerable success in implementing. As such, when discussing the outlook for the real estate market, it is important to discuss both existing conditions as well as the driving factors that are anticipated to encourage and disrupt housing market demand by structure type and built form. Furthermore, while market demand is important when considering long-range land-use planning, this demand must be widely considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and diversifying an economic base and supporting job creation.

The P.P.S., 2020 recognizes the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. As such, it provides details on how municipalities should plan for employment. The P.P.S., 2020 policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (Policy 1.3.2). The policy further outlines that, during an O.P. review or update, planning authorities assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (Policy 1.3.2.2). Notable policies related to planning for Employment Areas in the updated P.P.S., 2020 include requiring municipalities to have enough urban land supply to meet projected needs for a planning horizon of 25 years and include Employment Areas as areas that could be planned for beyond this horizon, provided they are not designated beyond the planning horizon.





### **2.1.2 Provincial Growth Plan for the Greater Golden Horseshoe**

The Growth Plan, 2019 which was created under the *Places to Grow Act, 2005*, was updated in May 2019 and amended in August 2020. It sets out where and how growth will occur across the G.G.H. to 2051 and that all planning decisions shall conform to it. The Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. Relevant aspects of the Growth Plan, 2019 for this study include the following:

#### **Managing and Directing Growth**

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

#### **Minimum Intensification Targets<sup>[9]</sup>**

- New minimum intensification targets, the minimum percentage of all residential development occurring annually within the delineated built-up area (B.U.A.), have been created for upper-tier and single-tier municipalities in the G.G.H. There are two geographic groups for intensification targets. Northumberland County is in

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<sup>[9]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, subsection 2.2.2.



the target group that requires, by the time the next M.C.R. is approved and in effect and for each year thereafter, the County maintain or improve upon the minimum intensification target contained in the O.P.

- It is important to note that all upper-tier and single-tier municipalities within the G.G.H. can apply for alternative intensification targets.

### **Minimum Greenfield Density Targets<sup>[10]</sup>**

- New minimum density targets have been created for the horizon of the Growth Plan, 2019 for G.G.H. upper-tier and single-tier municipalities and include two geographic groups. It is important to note that the greenfield density targets established in the Growth Plan, 2019 do not include Employment Areas.<sup>[11]</sup> Northumberland County is in the lower density target group, which is required to plan to achieve within the horizon of this Plan a minimum density target that is not less than 40 residents and jobs combined per hectare (ha).
- All upper-tier and single-tier municipalities can apply for alternative designated greenfield area (D.G.A.) density targets.

### **Employment<sup>[12]</sup>**

- According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within the settlement area. The density targets are to reflect the current and anticipated type and scale of employment that characterizes the Employment Area to which the target applies. Further, the minimum employment density target reflects opportunities for the intensification of Employment Areas on sites that support active transportation and are served by existing or planned transit.<sup>[13]</sup>
- Subsections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019 provide a framework for assessing the conversion of lands within Employment Areas through an M.C.R.

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<sup>[10]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, subsection 2.2.4.

<sup>[11]</sup> Ibid., subsection 2.2.7.

<sup>[12]</sup> Ibid., subsection 2.2.4.

<sup>[13]</sup> Ibid., subsection 2.2.5.



- As part of the Growth Plan, 2019, the Province allows for Employment Area land conversions outside of an M.C.R., while ensuring protections are in place to safeguard key Employment Areas as needed.
- The conversion of employment lands to a designation that permits non-employment uses is allowed outside of an M.C.R., provided that
  - there is a need for the conversion;
  - a significant number of jobs are maintained on those lands through the establishment of development criteria;
  - there are no adverse effects on the viability of an Employment Area or the achievement of minimum intensification targets; and
  - there are existing or planned services in place.<sup>[14]</sup>

### **Settlement Area Boundary Adjustments and Expansions<sup>[15]</sup>**

- The Growth Plan, 2019 places emphasis on a more outcome-focused approach to urban boundary expansions, rather than specifying types of studies required to justify the feasibility and location of expansions.
- Municipalities are allowed to undertake settlement area boundary expansions that are no larger than 40 ha (approximately 99 acres) outside of the M.C.R. process, subject to criteria.
- Settlement area boundary adjustments are also permitted outside of an M.C.R. provided there is no net increase in land within settlement areas, subject to criteria.
- If applicable, municipalities within the G.G.H. Outer Ring are required to identify excess lands and prohibit development on such lands to the horizon of this Plan. Excess lands are vacant lands that have been designated in the O.P. for development, and are in excess of what is needed to accommodate forecast growth to the horizon of the Growth Plan, 2019.<sup>[16]</sup>

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<sup>[14]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, subsection 2.2.5.10.

<sup>[15]</sup> Ibid., subsection 2.2.8.

<sup>[16]</sup> Ibid., definitions, p. 70.



## **Amendment 1 to A Place to Grow**

On August 28, 2020, the Province released Amendment 1 to the Growth Plan for the Greater Golden Horseshoe 2019, which has been incorporated into an Office Consolidation, August 2020 document. The Growth Plan, 2019 has been amended in conjunction with a revised outcome-based Land Needs Assessment (L.N.A.) methodology for the G.G.H. These documents are in effect as of August 28, 2020.

The population and employment growth forecast horizon set out in Schedule 3 of the Growth Plan, 2019 and the applicable time horizon for land-use planning have now been extended to 2051. It is further noted that the recommended Schedule 3 growth forecasts are to be treated as minimums, with higher growth forecast alternatives permitted by upper- and single-tier municipalities through their respective M.C.R. process.<sup>[17]</sup> If an alternative growth forecast that exceeds Schedule 3 of the Growth Plan, 2019 is utilized, the M.C.R. must demonstrate that the alternate growth scenario meets the Growth Plan, 2019 policy objectives of accommodating a range of housing choices to meet market demand and the needs of current and future residents, as well as providing additional labour opportunities for the G.G.H. labour market.<sup>[18]</sup> It should be noted that higher forecasts established by upper- and single-tier municipalities through their M.C.R.s will not apply to provincial ministries and agencies.<sup>[19]</sup>

### **2.1.3 Land Needs Assessment Methodology for the Greater Golden Horseshoe**

The Minister formally issued the final L.N.A. methodology on August 28, 2020, in accordance with Policy 5.2.2.1 c) of the Growth Plan, 2019.<sup>[20]</sup> This methodology replaces the previous L.N.A. methodology for the G.G.H. which was issued on May 4, 2018. The revised L.N.A. methodology focuses on a more simplified and outcome-

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<sup>[17]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation 2020, Policy 5.2.4, p. 56.

<sup>[18]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), p. 6.

<sup>[19]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation 2020, Policy 5.2.4.8, p. 57.

<sup>[20]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



based approach in comparison to the 2018 L.N.A. methodology. Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019, to assess the quantity of land required to accommodate forecast growth. The L.N.A. methodology identifies that the results of an L.N.A. can only be implemented through an M.C.R.

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

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

**“Employment Areas:** Areas where most of the employment land employment jobs are (i.e., employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the employment area. Employment areas may be in both *delineated built-up areas* and *designated greenfield areas*.”<sup>[21]</sup>

## 2.2 Oak Ridges Moraine Conservation Plan

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The Oak Ridges Moraine Conservation Plan was created under the provincial *Oak Ridges Moraine Conservation Act, 2001*. The Oak Ridges Moraine Conservation Plan is an ecologically based plan that provides land use and resource management direction for the 190,000 ha of land and water within the Moraine which stretches across southcentral Ontario. The lands to which the Oak Ridges Moraine Conservation Plan and the Niagara Escarpment Plan apply are also subject to the policies of the Greenbelt Plan. Within Northumberland County, the Oak Ridges Moraine Conservation Plan encompasses a large portion of the County in the northwest.<sup>[22]</sup>

The Oak Ridges Moraine Plan divides the Moraine into four land-use designations: Natural Core Areas, Natural Linkage Areas, Countryside Areas, and Settlement Areas. These designations provide policies on creating and developing new lots and

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<sup>[21]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 6, 7, and 15 to 18.

<sup>[22]</sup> Oak Ridges Moraine Conservation Plan (2017), p. 4.



development. Natural Core Areas and Natural Linkage Areas are the most restrictive designation. Exceptions are permitted in the Moraine's Rural Settlements, the Palgrave Estates Community, and for limited residential development in Countryside Areas in the City of Kawartha Lakes, Peterborough County and Northumberland County once the municipality has an approved growth management study and a rural economic development strategy, as well as a water budget and water conservation plan.<sup>[23]</sup>

Settlement Areas within the Oak Ridges Moraine Plan are permitted to accommodate urban uses and development, provided they are identified in the O.P. as a Settlement Area. It is important to note that Settlement Area boundaries are not permitted to expand into Natural Core Areas or Natural Linkage Areas.<sup>[24]</sup>

## **2.3 Northumberland County Official Plan**

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The Northumberland County O.P. (2016) is being reviewed as part of this M.C.R. process as it relates to growth management, growth forecasts, housing, employment and long-term urban land needs. As part of the M.C.R. and County O.P review process, the County is required to update its O.P. with the current version of the Growth Plan. As previously discussed, the Growth Plan, 2019 requires municipalities to update their respective O.P.s to a 2051 horizon, including reviewing and evaluating the minimum density and intensification targets as well as Schedule 3 population and employment forecast allocations as part of the M.C.R. process. The County is creating a new O.P. as part of this M.C.R. process.

In Northumberland County's current O.P. (2016), there are six Urban Areas: Brighton, Campbellford, Cobourg, Colborne, Hastings, and Port Hope. These areas are fully serviced and identified as preferred growth areas. It is important to note that while the Warkworth settlement area in Trent Hills is currently fully serviced, it does not have a provincially delineated built-up area (B.U.A.) and is excluded from the provincial L.N.A. methodology.

Rural lands (Hamlets and rural residential areas) with only municipal water services or without municipal services (water and sewer services) are projected to accommodate a limited amount of forecast growth within the County. These lands are located outside

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<sup>[23]</sup> Oak Ridges Moraine Conservation Plan (2017), p. 5.

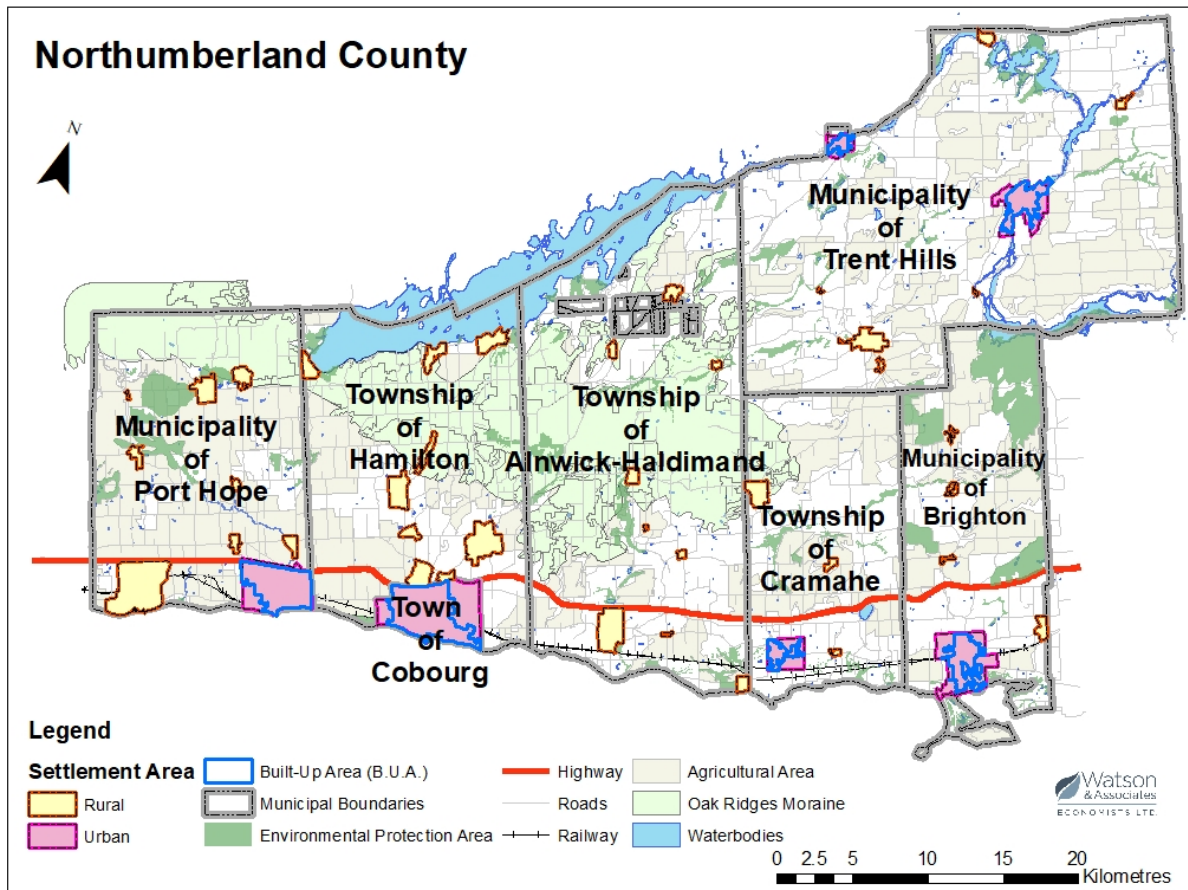
<sup>[24]</sup> Ibid., p. 5 and p. 76.





the County's Urban Areas and include Rural Settlement Areas. Figure 2-1 provides a map of the settlement types.

Figure 2-1  
Northumberland County  
Current Northumberland County O.P. (2016) Settlement Classification



Source: Data files from Northumberland County, presented by Watson & Associates Economists Ltd., 2021.

Key growth management targets of the County's current O.P. (2016) include the following:

- A minimum of 80% of the forecast population and employment in the planning period is expected to occur in the six urban areas, while the remaining 20% is expected to be located in the rural areas, as identified in Figure 2-1;





- A minimum of 40% of all residential development in the County will be within the B.U.A. of the municipality's six Urban Areas;
- The D.G.A. of the County is planned to achieve a minimum density target that is not less than 30 residents and jobs combined per ha, combined for the Urban Areas in the County.<sup>[25]</sup> The County's O.P. density target is lower than the Growth Plan, 2019 requirement of 40 residents and jobs combined per ha;
- Higher densities in new development areas should be encouraged to maximize the use of infrastructure;<sup>[26]</sup> and
- For Employment Areas, a 20-year supply of land for all types of employment uses across the County should be ensured at all times.<sup>[27]</sup>

## 2.4 Community Structure

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Northumberland County includes a blend of urban and rural communities. Provided herein is an overview of the structural components of the Urban and Rural Systems, including an assessment of the County's existing O.P. framework compared to the provincial Growth Plan, 2019 policy framework.

The Growth Plan, 2019 requires municipalities, through the M.C.R. process, to develop a hierarchy of settlement areas that identifies where and how the municipality will grow over the 2051 planning horizon. Further, the Growth Plan, 2019 requires that the majority of the growth is to be directed to the Urban System, comprised of fully serviced (water/wastewater servicing) settlement areas. In addition to an Urban System, Northumberland County has a large Rural System, comprising a large geographical area of the County. The Rural System also includes a portion of the County's population within Rural Settlement Areas and several Rural Employment Areas. The structural components of the Rural System are different than the Urban System with respect to function, role, and scale.

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<sup>[25]</sup> Northumberland County Official Plan, 2016, Policy B.10, p. 16.

<sup>[26]</sup> Ibid., Policy C1.2.1 d) p. 23

<sup>[27]</sup> Ibid., Policy C1.2.3 a) p. 24



## 2.5 Existing Northumberland County Community Structure

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The current Northumberland County O.P. (2016) Community Structure includes the following components:

- Urban Areas
  - These areas are fully serviced with a delineated B.U.A.: Cobourg, Port Hope, Campbellford, Hastings, Brighton, and Colborne.
- Rural Settlement Areas:
  - These areas are typically serviced through private communal sewage services and private communal water. The following lists the Rural Settlement Areas by municipality:
    - Municipality of Port Hope:
      - Campbellcroft
      - Garden Hill
      - Dale
      - Welcome
      - Canton
      - Osaca
      - Elizabethville
      - Wesleyville
    - Township of Hamilton:
      - Harwood
      - Gore's Landing
      - Bewdley
      - Cold Springs
      - Baltimore
      - Hamilton East
      - Precious Corners
      - Camborne
      - Hamilton West
    - Township of Alnwick/Haldimand:
      - Burnley
      - Fenella
      - Centreton



- Lakeport
  - Grafton
  - Roseneath
  - Eddystone
  - Vernonville
  - Wicklow
  - Municipality of Trent Hills:
    - Trent River
    - Crowe River
    - Warkworth
    - Norham
    - Meyersburg
    - Dartford
  - Municipality of Brighton:
    - Smithfield
    - Hilton
    - Orland
    - Codrington
  - Township of Cramahe:
    - Castleton
    - Salem
    - Dundonald
- Agriculture Areas
  - These lands are designated and considered to be the County's Prime Agricultural Areas and, therefore, should be maintained and preserved.
- Rural Area
  - These lands are located outside Urban Areas and Rural Settlement Areas, and do not have an Agriculture Area designation. The purpose of these lands is to encourage the establishment of sustainable and diversified rural and tourism opportunities.
- Environmental Protection Area
  - These lands include provincially significant wetlands, and areas of natural and scientific interest as identified by the Ministry of Natural Resources. Development and site alteration is not permitted on these designated



lands unless it has been demonstrated that there will be no negative impacts on these features or their ecological functions.

As previously mentioned, the Urban and Rural Areas have different functions in Northumberland County and are described in further detail in the sections below.

## 2.6 Urban System

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The Urban System includes urban settlement areas that are to accommodate most of the future residential and non-residential development. A key objective of the Urban System is to direct growth where there is planned and existing infrastructure in a manner that supports the principles of complete communities. Complete communities include a diverse mix of land uses that provide opportunities to live, shop and work in the same community. According to the Growth Plan, 2019, Northumberland County is required to also establish a hierarchy within the Urban System and within settlement areas.<sup>[28]</sup>

Within the Urban System, growth is to be prioritized within the B.U.A. The B.U.A. includes an area within a settlement that is municipally serviced (water and wastewater) and was delineated by the Province to represent the approximate area that was developed as of 2006, the year the Growth Plan came into effect. Northumberland County has six fully serviced urban settlements with a delineated B.U.A., including Cobourg, Port Hope, Campbellford, Hastings, Brighton, and Colborne. Figure 2-1 illustrates the B.U.A. and D.G.A. of the settlements of these urban communities as well as the Rural Settlement Areas.

Municipalities are required to explore opportunities to delineate strategic growth areas (S.G.A.s), areas that primarily prioritize intensification growth within the B.U.A. S.G.A.s can include major redevelopment areas, corridors with high-order transit, Major Transit Station Areas (M.T.S.A.s) and Urban Growth Centres (U.G.C.s), as identified in the Growth Plan, 2019. Based on a review of the B.U.A.s of the six Urban Settlement Areas, the B.U.A.s of the County do not offer a large enough geographic area and scale to identify S.G.A.s. As such, it is recommended that the County consider the entire B.U.A. as an S.G.A. for intensification. It is recognized that portions of the B.U.A. may

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<sup>[28]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, Policy 2.2.1., p. 14.



have potential constraints (e.g., flood hazards, servicing) and local municipalities may consider identifying areas for intensification in their local municipal O.P.

### ***2.6.1 What is the Urban Area?***

The Urban Area includes settlement areas that have full municipal servicing. These settlements have a B.U.A. where growth is to be prioritize first within the municipality. Urban Areas have a mix of uses that support complete communities, including Urban Employment Areas. Urban Areas, excluding Urban Employment Areas, are referred to as Community Areas.

It should be noted that in accordance with the Growth Plan, 2019 and the provincial L.N.A., the definition of an Urban Area is based on the ability of a settlement area to accommodate growth through intensification in the B.U.A. A key objective of the Growth Plan, 2019 is to take an intensification-first approach to growth which involves directing growth to the B.U.A. Municipalities may have a different definition of an Urban Area; however, settlement area boundary expansions (identifying land needs) are required to follow provincial policies and the provincial L.N.A. As such, if the municipal definition of an Urban Area is broader than the Growth Plan, 2019 definition, the municipality should provide a further breakdown of the Urban Areas in the O.P. to identify those that meet the provincial requirements of Growth Plan, 2019 Policies 2.2.1. and 2.2.8., and the provincial L.N.A.

### ***2.6.2 What is an Employment Area?***

Employment Areas are clusters of industrial or export-based employment. Employment Areas accommodate uses in a range of industrial sectors as well as limited commercial uses (uses that complement the Employment Area). Employment Areas provide opportunities for economic activities that cannot be accommodated in other areas, given the potential for incompatibility of surrounding uses. Land uses such as major retail, large institutional uses (e.g., schools), and residential uses are considered sensitive uses and are not permitted within an Employment Area. The Growth Plan requires upper- and single-tier municipalities, in consultation with lower-tier municipalities, to



designate all Employment Areas in the O.P. and protect them for appropriate employment uses over the long term.<sup>[29]</sup>

Non-residential uses on lands not classified as Employment Areas are a part of the Community Area that supports the settlement area. Community Areas are the lands within the Urban Settlement Area (Urban Areas) that exclude Employment Areas. Community Areas accommodate residential uses as well as non-residential uses that support local residents and visitors/tourists.

### **2.6.3 Structural Components of the Urban System**

The following is a summary of the key structural components of the Urban System:

- **Built-up Area (B.U.A.)** – priority areas to accommodate urban growth.
- **Designated Greenfield Area (D.G.A.)** – developing areas to accommodate the remaining urban growth not accommodated in the B.U.A.
- **Employment Areas** – Urban Areas that are protected from sensitive uses and accommodate export-based or industrial employment.
- **Community Areas** – Urban Areas that accommodate residential and employment outside Employment Areas, including major retail.

## **2.7 Rural System**

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The Rural System includes lands that are protected from large-scale urban development. A key objective of the Rural System is to protect agriculture land, resources and the natural environment, while encouraging economic and cultural activities that support the health and prosperity of rural communities.

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<sup>[29]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, Policy 2.2.5., p. 19.

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### **2.7.1 What is the Rural Area?**

The Rural Area is generally the area within the municipality with partial or no municipal servicing (water/wastewater servicing). According to the Growth Plan, 2019, the Rural Area is comprised of rural settlement areas, rural lands and prime agricultural lands.<sup>[30]</sup>

**Rural Settlement Areas** include existing Hamlets or similar existing small settlement areas that are long established in the O.P. These communities are typically serviced by individual, private, on-site water and/or private wastewater systems.<sup>[31]</sup> It is further noted that all settlement areas identified as Hamlets in the Greenbelt Plan, such as rural settlements in the Oak Ridges Moraine Conservation Plan, or as minor urban centres in the Niagara Escarpment Plan, are considered Rural Settlement Areas in meeting the Growth Plan, 2019 definition.<sup>[32]</sup> According to the Growth Plan, 2019, a limited amount of growth is allocated to Rural Settlement Areas.<sup>[33]</sup>

**Rural lands** include non-prime agriculture lands (including rural residential lots) outside Rural Settlement Areas. Rural lands accommodate uses that are not appropriate in settlement areas, including resource-based activities and recreational activities. Rural lands also include **Rural Employment Areas**, which are defined as a cluster of industrial activities outside settlement areas, typically with partial or no services. Future Rural Employment Area growth is to be directed largely to existing designated Rural Employment Areas (as of June 16, 2006) or through expansions to accommodate existing business operations.<sup>[34] [35]</sup>

**Prime agriculture areas** are where prime agricultural lands predominate. This includes areas of prime agricultural lands and associated Canada Land Inventory Class 4 through 7 lands and additional areas where there is a local concentration of farms and ongoing agriculture activities. Prime agricultural areas are to be identified by the Ontario Ministry of Agriculture, Food and Rural Affairs (O.M.A.F.R.A).<sup>[36]</sup>

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<sup>[30]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation, Definitions, p. 81.

<sup>[31]</sup> Ibid.

<sup>[32]</sup> Ibid., Definitions, p. 81.

<sup>[33]</sup> Ibid., p. 13.

<sup>[34]</sup> Ibid., Policy 2.2.9., p. 27 and Definitions, p. 81.

<sup>[35]</sup> Ibid., Policy 2.2.9., p. 27.

<sup>[36]</sup> Ibid., Definitions, p. 79.





### **2.7.2 Structural Components of the Rural System**

The following is a summary of the key structural components of the Rural System:

- **Rural Settlement Areas** – Hamlets and small-scale settlements that are to accommodate a limited amount of growth on land with private or partial servicing. According to the Growth Plan, 2019, Rural Settlement Areas should serve as community hubs where public service facilities are maintained and adapted to the needs of the surrounding community.<sup>[37]</sup>
- **Prime agriculture lands** – lands identified by the O.M.A.F.R.A. where agricultural uses predominate. These lands are to be protected; however, diversification of on-farm uses (uses that are secondary to the principal agricultural use of the property) is encouraged.<sup>[38]</sup>
- **Rural Employment Areas** – clusters of industrial activities outside settlement areas on non-serviced lands. Rural Employment Area growth is limited to existing designated lands (as of June 16, 2006) or through the expansion of existing business operations.
- **Other rural lands** – all other non-serviced lands. These lands are to accommodate a limited amount of growth. Growth on these lands is primarily limited to resource development, recreational-based and other economic activities not accommodated within settlement areas.

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<sup>[37]</sup> A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation, Policy 2.2.9, p. 27 and Definitions, p. 81,

<sup>[38]</sup> Ibid., Definitions, p. 78.



### 3. Overview of Macro-Economic and Regional Non-Residential Real Estate Trends

This chapter summarizes the macro-economic trends influencing regional labour force and employment within Ontario, the G.G.H., and Northumberland County over the past two decades. This broader analysis has been undertaken to provide additional insight with respect to the recent macro-economic and demographic trends which are anticipated to continue to influence both the near-term and longer-term growth outlook for Northumberland County over the next several decades (refer to Appendix A for supplementary information).

#### 3.1 Near-Term Impacts of COVID-19

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##### 3.1.1 *Near-Term Economic Impacts*

Since being declared a pandemic by the World Health Organization (W.H.O.) on March 12, 2020, the economic impacts of coronavirus disease (COVID-19) on global economic output have been significant. Economic sectors such as travel and tourism, accommodation and food, manufacturing, and energy have been hit particularly hard. On the other hand, many other employment sectors (particularly knowledge-based sectors), which are more adaptable to the current remote work environment, have been less negatively impacted and in some cases have prospered.

Canada's gross domestic product (G.D.P.) declined by approximately 39% in the second quarter of 2020 (April to June) due to COVID-19. As restrictions gradually loosened during that period, beginning in May 2020, businesses came out of lockdown during the summer months and economic activity grew at a pace of 40.5% in the third quarter, although G.D.P. was still short of pre-pandemic levels.

Economic growth continued through the fourth quarter of 2020, increasing by 2.3% despite increased COVID-19 restrictions towards the end of November 2020. Despite this fourth quarter increase, real G.D.P. in 2020 declined overall by 5.4%. Heading into 2021, Canada's economy grew sharply by 6.5% in the first quarter, but due to the impacts of the third COVID-19 wave the April 2021, the Province-wide lockdown weighed on economic activity in the second quarter of 2021. Given the relatively strong economic performance leading up to April 2021, it is expected that economic setbacks



due to the lockdown will be recouped as provincial restrictions continue to ease.<sup>[39] [40] [41] [42]</sup>

Overall, required modifications to social behavior (e.g., physical distancing) and increased work at home requirements, resulting from government-induced containment measures and increased health risks, have resulted in significant economic disruption largely related to changes in consumer demand and consumption patterns. Furthermore, continued tensions, logistical challenges and constraints related to international trade have also begun to raise further questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

At present, the level of sustained economic impact related to this “exogenous shock” to the world and the Canadian economy is still relatively uncertain. While the prospects for a global recovery have improved in recent months, the pace of this global economic recovery has been uneven, largely due to the rate at which countries have been able to vaccinate their residents and contain the virus, particularly as it relates to new variants.<sup>[43]</sup>

Despite the challenges of COVID-19, the long-term economic and housing outlook for the G.G.H. remains positive as the region continues to be attractive to international investment and newcomers alike. While the housing market across the G.G.H. experienced a slow start in early 2020 due to COVID-19, pent-up demand and historically low mortgage rates have accelerated housing demand across the region with record sales and higher average selling prices.

For Northumberland County, the COVID-19 pandemic has been a significant driver of housing demand, led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade “city lifestyles” for “smaller town

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<sup>[39]</sup> Reuters Business News, August 28, 2020.

<sup>[40]</sup> CBC Business News, Canada’s economy bounced back at record 40% pace in third quarter – but GDP still below pre-COVID levels, December 1, 2020.

<sup>[41]</sup> Ontario Newsroom, Office of the Premier, Ontario Declares Second Provincial Emergency to Address COVID-19 Crisis and Save Lives, January 12, 2021.

<sup>[42]</sup> Reuters, Canadian Economy Seen Strong in First Quarter, But Impact of Third Wave Looms, April 20, 2021.

<sup>[43]</sup> Global Government Forum. OECD Warns of Uneven Economic Recovery from COVID-19, Despite Global Growth. June 1, 2021.



living.” It is recognized, however, that the longer-term population and employment growth potential for the County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in Northumberland County over the long term.

Reduced immigration levels in 2020 and expected lower immigration levels in 2021 are anticipated to represent a drag on population growth potential within the larger urban centres of the G.G.H.<sup>[44]</sup> Tighter mortgage rules and local measures designed to curb market speculation may also temper demand in real-estate market as home buyers continue to face stiffer mortgage stress tests, and in some locations, taxation associated with vacant homes.<sup>[45]</sup><sup>[46]</sup> The Governor of the Bank of Canada has also warned that home buyers who have overextended on their mortgages are vulnerable to rising interest rates when they must be renewed, and not to expect the rapid price increase to continue indefinitely.<sup>[47]</sup>

### **3.1.2 COVID-19 and the Changing Nature of Work**

In addition to its broader impacts on the economy, COVID-19 is also accelerating changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. Businesses will increasingly be required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks (V.P.N.s), virtual meetings, cloud technology and other remote work collaboration tools. These trends are anticipated to have a direct influence on commercial and industrial real estate needs over both the near and longer terms. In light of these anticipated trends, it is important to consider the manner in which these impacts are likely to influence the nature of employment by type, as well as by place of work.

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<sup>[44]</sup> “Very difficult” to meet Canada’s immigration targets after pandemic drop: immigration lawyer. CTV News. January 14, 2021.

<sup>[45]</sup> A Toronto Empty Homes Tax is Coming in January 2022. July 29, 2021. Zo’Casa

<sup>[46]</sup> Canadian homes sales slipped 3% in July while average price fell to \$662,000. August 16, 2021. CBC.

<sup>[47]</sup> CTV Business News, Mortgage stress tests set to tighten in wake of Bank of Canada warnings, May 20, 2021.



It is likely that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will steadily increase over the long term, driven by continued growth in knowledge-based sectors and technological advancement. As the percentage of work at home and off-site employment continues to steadily rise, this may reduce the relative need for future commercial office, retail and institutional building space within Northumberland County.

Over the 2001 to 2016 period, the percentage of Northumberland County's labour force defined as having a usual place of work declined, offset by a gradual increase in the share of off-site employment (also referred to as employees with no fixed place of work (N.F.P.O.W.)).<sup>[48]</sup> Within Northumberland County, the rising share of labour related to (N.F.P.O.W.) has been primarily driven by steady growth in the transportation and construction sectors which are typically characterized as having a higher percentage of off-site employees. Technological innovation and improved broadband regional telecommunications will continue to be key drivers of economic expansion in knowledge-based sectors as well as the steady rise of the gig economy.<sup>[49]</sup> Looking forward, continued advances in technology and telecommunications (e.g., 5G technology) are anticipated to further enable remote work patterns and ultimately increase the relative share of off-site employment over the long term.<sup>[50]</sup>

Over the coming decades, work at home and N.F.P.O.W. employment is generally expected to steadily increase as a result of these trends. Demographics and socio-economics also play roles in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in the County will utilize technology to allow them to supplement their income in more flexible ways in contrast to traditional work patterns.

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<sup>[48]</sup> Statistics Canada defines employees with no fixed place of work as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

<sup>[49]</sup> The gig economy is characterized by flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform.

<sup>[50]</sup> CENGn announced rural Ontario broadband project for Alnwick/Haldimand Township: <https://www.cengn.ca/information-centre/news/press-releases/cengn-announces-rural-ontario-broadband-project-for-alnwick-haldimand-township/>



### **3.1.3 Near-Term Immigration Levels for Canada are Likely to Remain Below Historical Averages Due to COVID-19**

In October 2020, the Canadian federal government released its Immigration Levels Plan for the next three years. Canada has continued to raise their immigration targets and aims to welcome 401,000 new permanent residents in 2021, 411,000 in 2022, and 421,000 in 2023. This is an increase of 50,000 newcomers annually from the previous targets of 351,000 in 2021 and 361,000 in 2026. The increase in immigration targets is intended to help make up for the shortfall in 2020 and fill crucial labour market gaps to ensure Canada remains competitive on the world stage. With a focus on economic growth, 60% of admissions are to come from the economic class.<sup>[51]</sup>

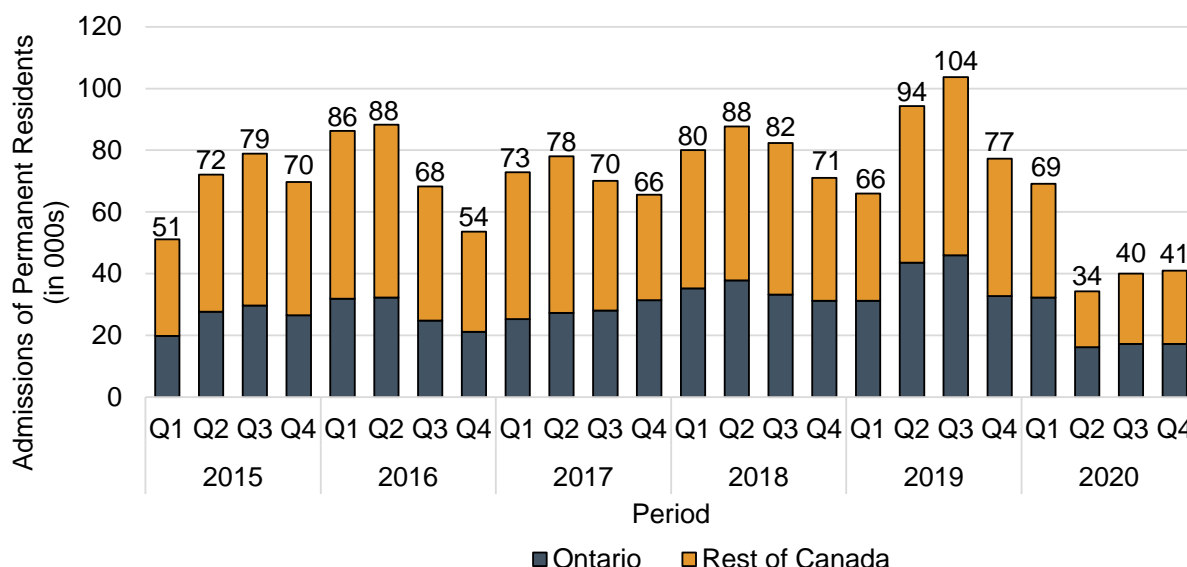
Figure 3-1 summarizes admissions to Canada and Ontario by quarter since 2015. Looking forward through 2021, immigration levels to Canada and Ontario are anticipated to remain low as a result of travel restrictions due to COVID-19. This suggests that near-term immigration levels in southwestern Ontario will also remain below recent historical averages. While a surge of applications is anticipated as travel restrictions ease, sustainable higher levels of immigration in line with the increased immigration targets will be largely dictated by the on-going strength of the national and provincial economies.

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<sup>[51]</sup> Immigration, Refugee and Citizenship Canada news release, October 20, 2020. <https://www.canada.ca/en/immigration-refugees-citizenship/news/2020/10/government-of-canada-announces-plan-to-support-economic-recovery-through-immigration.html>



Figure 3-1  
Quarterly Admission of Permanent Residents in Ontario Versus the Rest of Canada,  
2015 to 2020



Source: Derived from IRCC, December 31, 2020 data by Watson & Associates Economists Ltd., 2021.

## 3.2 Planning within the Context of an Evolving National and Provincial Economic Outlook

### 3.2.1 Ontario Outlook within the Canadian Context

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by G.D.P. output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector. This has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn but have more recently stabilized.

Over the past decade, the Ontario economy experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery was relatively slow to materialize. That said, provincial G.D.P. levels have sharply rebounded since 2013, as illustrated in Figure 3-2. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar and the





gradual strengthening of the U.S. economy.<sup>[52]</sup> Provincial G.D.P. growth is anticipated to ease from just over 2.2% in 2018 to approximately 1.7% by 2020, largely as a result of a tightening labour market and slowing global economic growth.<sup>[53]</sup> As illustrated in Figure 3-2, the Ontario economy is forecast to rebound by 5.5% in 2021 but is expected to slow down to 4.9% in 2022.

While the recent performance of the Ontario economy has remained relatively strong over the past several years, from 2014 to early 2020, the COVID-19 pandemic poses significant risks to the national and provincial economies related to rising government, corporate and personal debt, inflationary pressures and supply disruptions that are important to recognize. Vaccine resistance among some segments of the population and the persistence of new COVID-19 variants also add to the uncertainty regarding the pace of the provincial economic recovery.<sup>[54]</sup> The current pace of housing price appreciation across most areas of the Province also continues to pose a risk to the overall stability of the provincial economy. Recent sharp increases in housing prices across Ontario have contributed to record consumer debt loads and continue to erode housing affordability. Over the long term, the outlook for the Ontario housing market remains positive; however, it will be increasingly important for Ontario municipalities such as Northumberland County to explore solutions to address affordable ownership and rental housing options that accommodate a wide range of residents by age and income.

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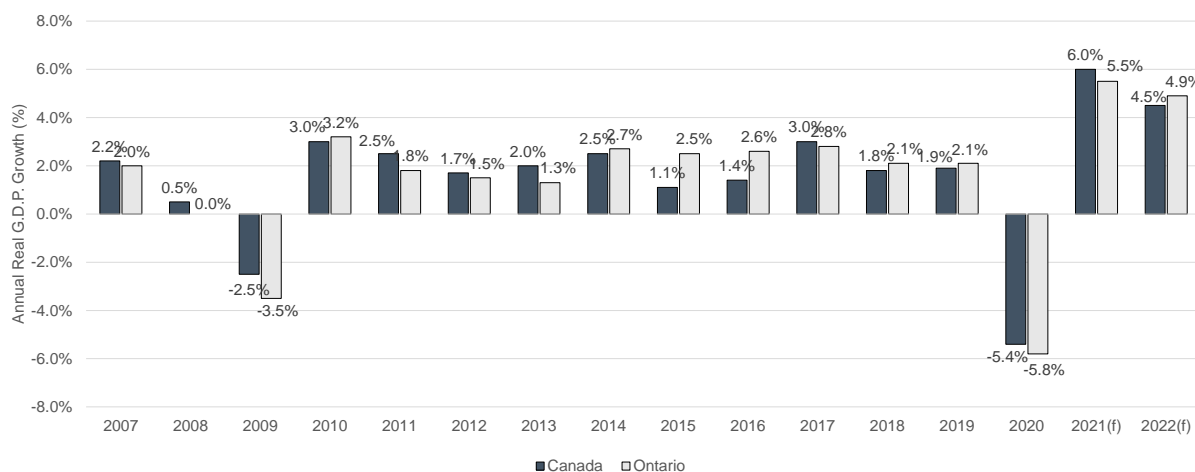
<sup>[52]</sup> Valued at approximately \$0.81 U.S. as of October 2021.

<sup>[53]</sup> BMO Provincial Outlook, Spring 2019.

<sup>[54]</sup> The Conference Board of Canada. Canadian Outlook. Booming Economy not without its Risks. July 6, 2021.



Figure 3-2  
Province of Ontario and Canada  
Annual Real G.D.P. Growth, Historical (2007 to 2020) and Forecast (2021 to 2022)



Note: 2021 to 2022 are forecast by BMO Capital Markets Economics

Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, April 2021, by Watson & Associates Economists Ltd., 2021.

### 3.3 Emerging Industry Sector and Labour Force Trends

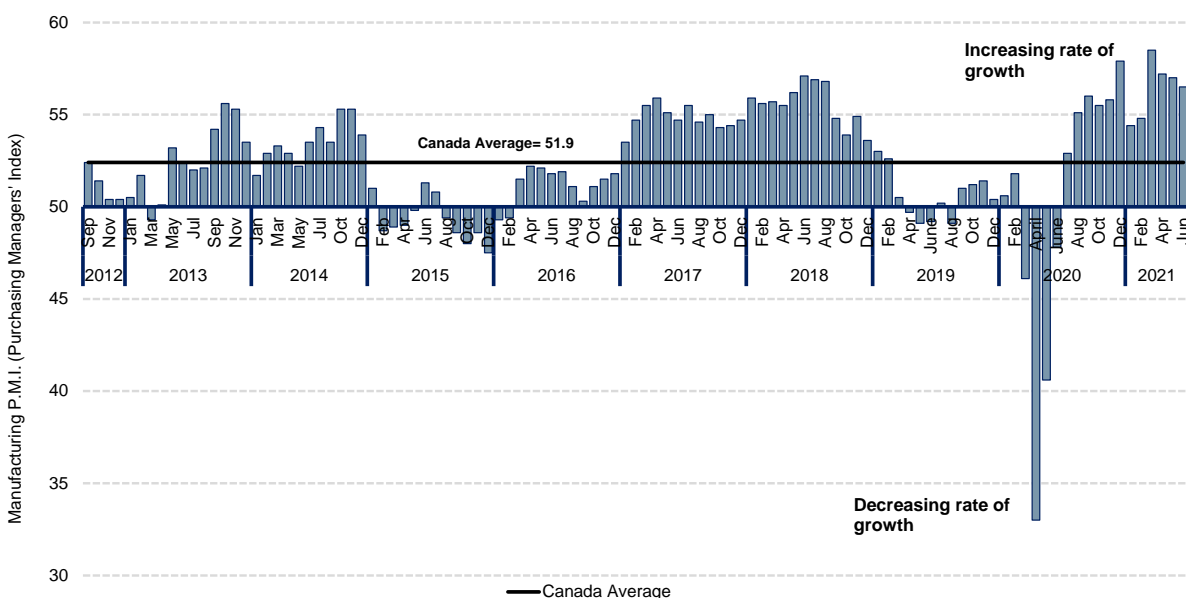
#### 3.3.1 Outlook for Provincial and Regional Manufacturing Sectors

The Purchasing Managers' Index (P.M.I.) is a prevailing economic indicator for economic trends in the manufacturing and services sectors, which is based on the purchasing managers' market condition outlook and serves as a key measure of the direction of the manufacturing sector on a monthly basis. The P.M.I. index ranges between a number of 1 to 100. A P.M.I. value greater than 50 represents an expansion relative to the previous month, while a P.M.I. value less than 50 represents a contraction. Figure 3-3 summarizes the P.M.I. index for Canada between 2012 and 2020 (April). As illustrated in Figure 3-3, the P.M.I. index largely exhibited moderate to strong expansion between 2012 and 2018, with the exception of 2015 and 2019 which experienced contractions. Also, 2013 and 2016 experienced periods of brief economic contraction. The P.M.I. index showed steep contractions at the beginning of March 2020 in manufacturing and services-sector activity due to the negative effects of COVID-19 on the global economy, international trade, and the general demand for goods and services. These conditions worsened into April 2020; however, they showed



signs of a moderate rebound in May and June and strong growth from August to June 2021.

Figure 3-3  
Purchasing Managers' Index for Canada, 2001 to 2021 Y.T.D.



Note: Above 50.0 indicates growth from previous month, 50.0 indicates no change from previous month, and values below 50.0 indicate a decline from previous month.

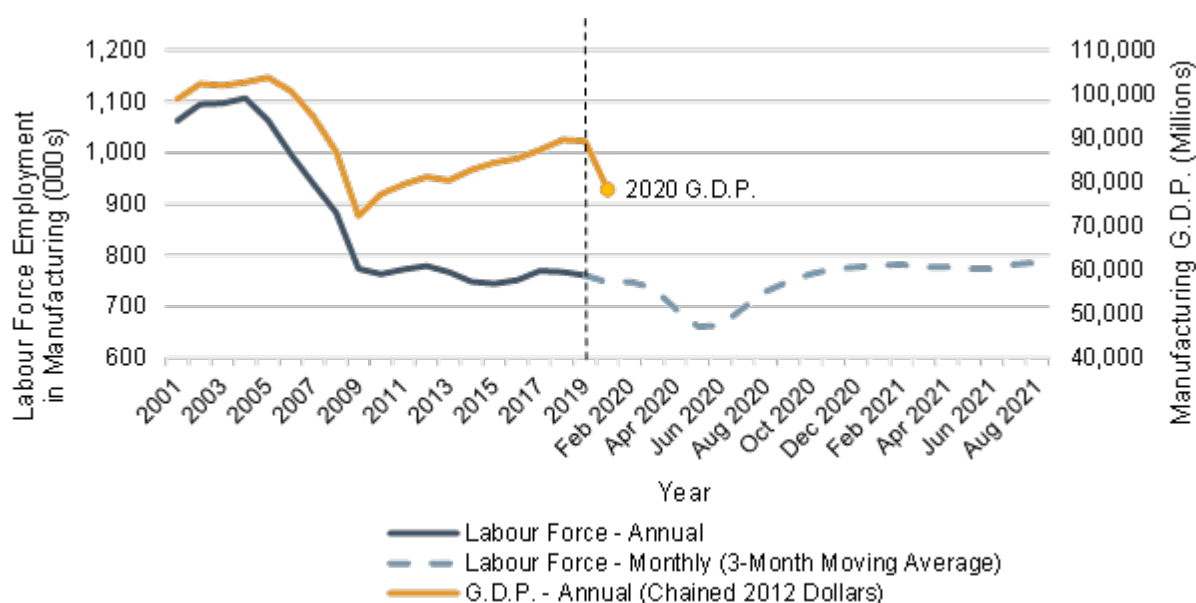
Source: HIS Markit Canada, Canada PMI Index, June 2012–June 2021 summarized by Watson & Associates Economists Ltd., 2021.

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate a high rate of labour-force growth across the Province over the coming decades, as globalization has led to increased outsourcing of manufacturing processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, the nature of industrial processes is rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive. As a result of increased efficiencies in the manufacturing sector, G.D.P. has increased relative to generally flat labour force trends as G.D.P. output per employee rises.



As summarized in Figure 3-4, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009 with respect to labour force and G.D.P. Between 2009 and 2019, however, provincial labour force levels in the manufacturing sector stabilized, while G.D.P. output steadily increased. While showing modest growth since 2016, labour force levels in the manufacturing sector declined in early 2020 due to the impacts of COVID-19 but showed a steady rebound between June 2020 and August 2021.

Figure 3-4  
Manufacturing Labour Force Employment in Ontario, 2000 to 2020 Y.T.D.



Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, and monthly data from Table 14-10-0091-01. Annual G.D.P. data from Statistics Canada Table 36-10-0402-01 by Watson & Associates Economists Ltd., 2021.

### 3.3.2 Broader Regional Economic Outlook, 2001 to 2019

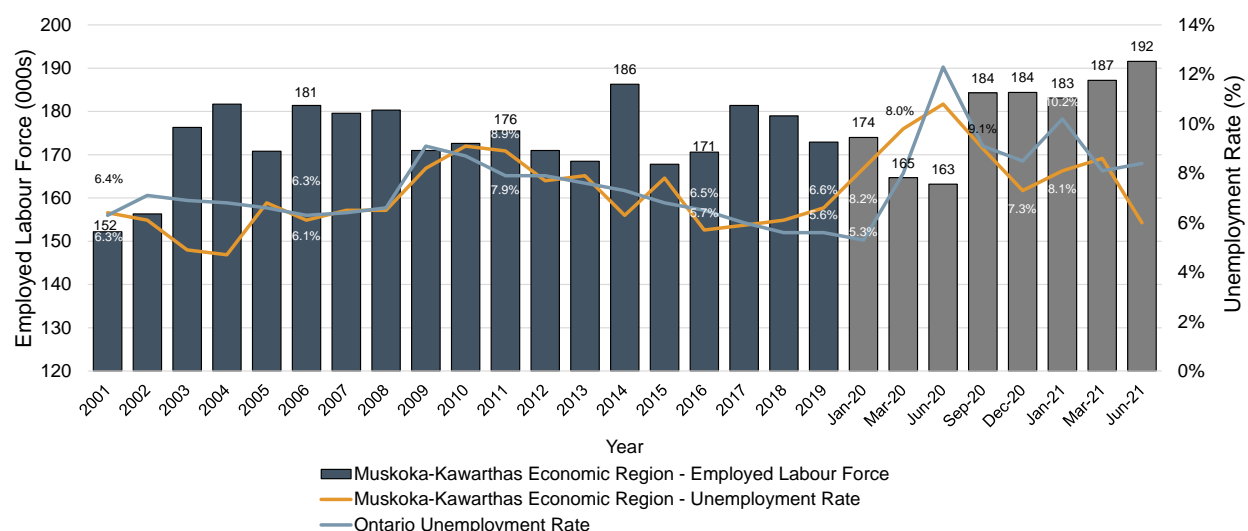
Figure 3-5 illustrates total labour force and unemployment rate trends for the Muskoka-Kawarthas economic region. Labour force data is not available for Northumberland County post-2016, but it is captured in the broader Muskoka-Kawarthas economic region. Key observations include:

- The total labour force growth within the Muskoka-Kawarthas economic region increased from 152,000 to 171,000 between 2001 and 2016;



- In contrast, during the post-2016 period, the labour force market has shown moderate growth, increasing from 171,000 in 2016 to 173,000 in 2020, an increase of 2,000 or 0.4%;
- The unemployment rate in the Muskoka-Kawarths economic region peaked at 9.1% in 2010, coinciding with the 2008 global economic recession, and then fell to 6.6% in 2019. In 2020, however, the unemployment rate rose to 9.0%, corresponding with the COVID-19 pandemic;
- Since peaking in mid-2020, the unemployment rate in the broader Muskoka-Kawarths Economic Region has been steadily declining as the regional economy continues to recover;
- Over the medium to longer term (i.e., next three to ten years) the economic outlook for Northumberland is positive and it is anticipated that the County's unemployment rate will steadily decline close to previous lows as the regional economy continues to recover; and
- To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by the County and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a broad range of housing options.

Figure 3-5  
Muskoka-Kawarths (Economic Region)  
Total Labour Force and Unemployment Rate Trends, 2001 to 2021



Note: Statistics Canada Labour Force Survey and Census Labour Force statistics may differ.



Source: Muskoka-Kawarths Economic Region employed labour force and unemployment rate from Statistics Canada Table 14-10-0096-01, Province of Ontario unemployment rate from Statistics Canada Table 14-10-0327-01. Derived by Watson & Associates Economists Ltd., 2021.

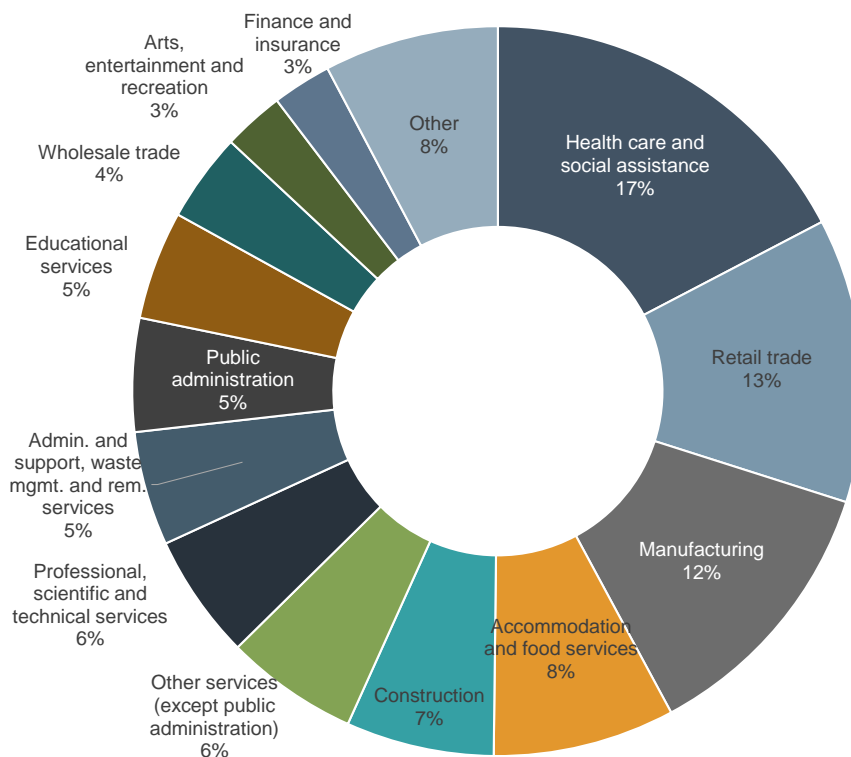
### **3.3.3 Northumberland County's Evolving Economy**

#### **3.3.3.1 2021 Employment by Sector**

Employment represents the number of jobs located within the County. This includes the live/work labour force, including work at home employees, as well as in-commuters. As summarized in Figure 3-6, the County's existing employment base is concentrated in a diverse range of goods-producing and services-producing sectors, such as health care and social assistance, retail trade, small- to medium-scale manufacturing, accommodation and food services, construction, professional, scientific and technical services, and administrative and support, waste management and remediation services, educational services and public administration.



Figure 3-6  
Northumberland County  
Employment Base as of 2021



Note: Management of Companies and Enterprises has been excluded due to limited data availability.

Source: Derived from EMSI by Watson & Associates Economists Ltd., 2021.

### 3.3.3.2 Northumberland County Employment Trends by Economic Cluster, 2011 to 2021

Within Northumberland County recent employment growth has been particularly strong in knowledge-based sectors such as health care and social assistance, real estate and rental and leasing, professional scientific and technical services, finance, and insurance which have had notable increases in employment. Commercial sectors such as accommodation and food services have also experienced steady growth over the past decade. On the other hand, with the exception of the transportation and warehousing sector, all other major industrial sectors, such as manufacturing and construction, have experienced employment decline over the past decade.





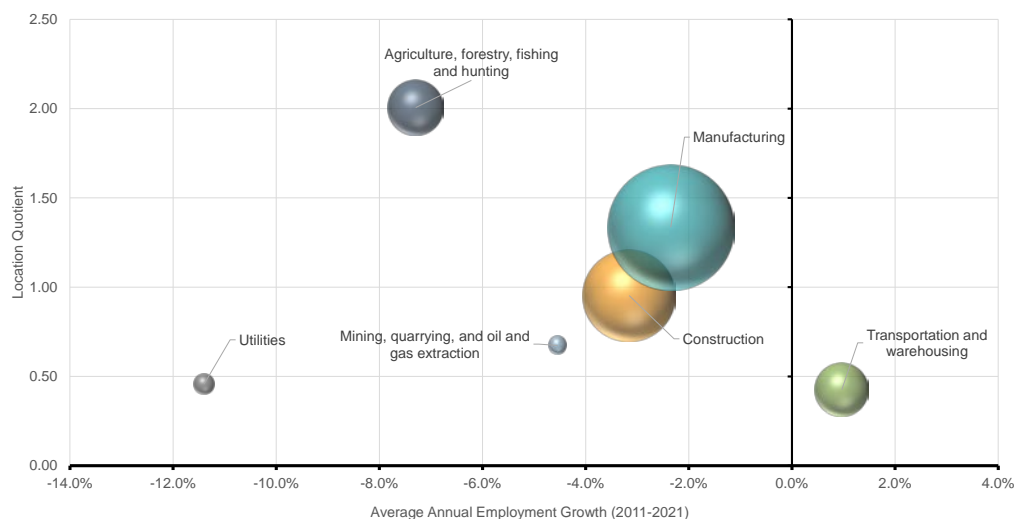
Figure 3-7 and Figure 3-8 illustrate the relative concentration of employment sectors in Northumberland County relative to the Province using Location Quotients (L.Q.). An L.Q. of 1.0 (as indicated by the Y-axis in Figure 3-7 and Figure 3-8) identifies that the concentration of employment by sector is consistent with the broader employment base average of the Province as a whole. An L.Q. of greater than 1.0 identifies that the concentration of employment in a given employment sector is higher than the provincial average, which suggests a relatively high concentration of a particular employment sector or “cluster.” The relative amount of employment by sector (estimated as of 2021) is also indicated by the relative size of the spheres illustrated in Figure 3-7 and Figure 3-8. Lastly, historical growth rates by employment cluster are also measured across the X-axis.

As shown in Figure 3-7, Northumberland County has a relatively high employment concentration in manufacturing, construction, and transportation and warehousing; however, only the transportation and warehousing sector has experienced employment growth over the past decade. The agriculture, forestry, fishing and hunting sector also has a relatively high concentration in the County but has experienced a steady decline in employment over the past decade.

Figure 3-8 summarizes the services-producing industries in Northumberland County, relative to the Province of Ontario. Accommodation and food services and health care have high employment concentrations relative to the Province, a large existing employment base, and are experiencing steady employment growth. It is also noted that at a number of emerging (i.e., less concentrated) knowledge-based sectors, including financial services, professional, scientific and technical services, and real estate and rental leasing, have experienced steady employment growth over the past decade across the County.

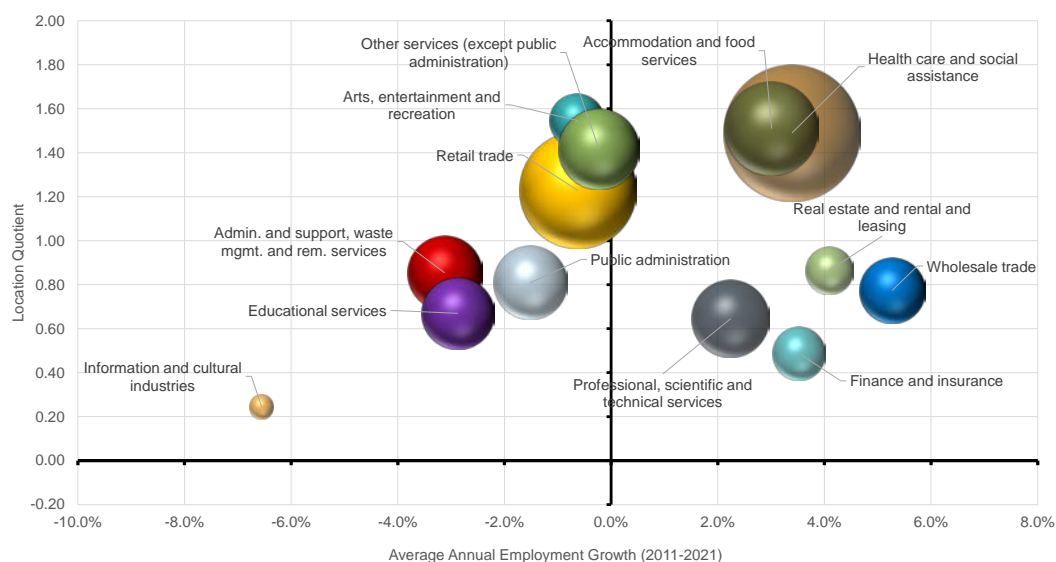


Figure 3-7  
Northumberland County  
Goods Producing Industry Cluster Size and Growth Matrix, 2011 to 2021



Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2021.

Figure 3-8  
Northumberland County  
Service Providing Industry Cluster Size and Growth Matrix, 2011 to 2021



Note: Due to data unavailability, Management of Companies and Enterprise Industry is not shown.  
Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2021.



### **3.3.4 Planning for Industrial Sectors**

Recognizing these recent structural changes in the regional economy there is a need for Northumberland County to ensure that the amount, type, and location of its established and planned Employment Areas are well aligned with anticipated market demand. This requires that near-term (i.e., shovel-ready lands) and longer-term Employment Area land needs are adequately addressed.

It is also important that the County's Employment Areas are planned and designed to accommodate a broad range of established and emerging industrial sectors related to advanced manufacturing, Goods Movement, construction, utilities and employment-supportive uses. Such Employment Areas should also offer competitive attributes and supportive infrastructure, urban amenities and synergies to attract the growing knowledge-based sector. Two key real estate trends that influence the planning of Employment Areas in today's economy are explored below.

#### **Integrated Development in the Advanced Manufacturing Sector**

Many of the growing sub-sectors in advanced manufacturing, such as energy, automotive, technology and clean tech, require integrated operations on larger sites in a "campus-style" setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics, and on-site manufacturing.

To address the broad needs of industry, a range of Employment Areas by site size, access, designation/zoning, and surrounding land use are required which provide significant land area to accommodate mid- to large-scale uses with opportunities surface parking and future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than standalone major office developments. Given the unique operational requirements of these facilities, such uses often cannot be accommodated in downtown or mixed-use office settings. In industrial/business parks, prestige industrial uses are often positioned at gateway locations (i.e., at major highway interchanges) with direct highway access/exposure as well as good connectivity to arterial roads.



## **Growing Demand in the Goods Movement Sector**

Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas. Across North America, the Goods Movement industry is continuously evolving at a rapid pace responding to growing consumer demand as well as increased expectations with respect to speed of delivery. As discussed below, e-commerce and technological improvements represent the biggest drivers of change in the Goods Movement industry, driven by the rapid growth of mobile technology.

A growing share of development within the Goods Movement sector is related to “last mile” urban warehousing facilities that focus on serving the steadily growing urban population base through the final transportation of goods from the distribution centre or fulfillment hub to the final destination (i.e., the retailer or consumer). Continued growth in e-commerce is anticipated to reduced demand for retail square footage, in particular retail space for goods-based retailers, while increasing employment growth and land demand related to the logistics sector.<sup>[55]</sup>

Retail e-commerce sales have risen steadily across Canada, with the proportion of online sales rising from 2.4% in 2016 to a high of 11.4% percent in April 2020; however, since then online sales have declined and levelled of at 7.5% as of April 2021.<sup>[56]</sup> Further, the digital impact of retail sales is even greater with mobile purchasing platforms (e.g., UberEats, Skip the Dishes) that support retail sales of local retailers. As the e-commerce market continues to expand, this component of the supply chain is becoming increasingly important to businesses as it has a direct influence on the customer experience. In addition to the need to provide timely, accurate service

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<sup>[55]</sup> Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores, home improvement stores and stores selling general merchandise, apparel and furniture.

<sup>[56]</sup> Statistics Canada Retail e-commerce sales, Table 20-10-0072-01.



delivery, it is also critical for the industry to ensure cost efficiency given that 30% to over 50% of total parcel delivery cost is associated with this leg of the supply chain.<sup>[57]</sup> <sup>[58]</sup>

### **3.3.5 Planning for Knowledge-Based Sectors**

As previously noted, recent employment growth has been increasingly driven by growth in the knowledge-based or creative class economies, including employment sectors such as advanced manufacturing, professional, scientific and technical services, finance and insurance, real estate, information and culture, health care and social assistance, and education. With an increasing emphasis on these knowledge-based sectors, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming increasingly dominant built forms.

Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores “place making” as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met. This is particularly relevant in compact, pedestrian-oriented, mixed-used environments that integrate office commercial, residential and other community uses with public open spaces. As previously noted, demand will also continue to exist in Northumberland County for knowledge-based uses in business park settings which offer ample land supply and lands for future expansion. To address the broad needs of industry, a range of employment and commercial areas by site size, access, designation/zoning and surrounding land use should be considered within both Employment Areas and Community Areas.

## **3.4 Regional and Local Economic Growth Drivers and Disruptors**

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A broad range of considerations related to demographics, economics and socio-economics is anticipated to impact future population and employment growth trends

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<sup>[57]</sup> Breaking Down the “Last-Mile Delivery”: Challenges and Solutions. October 12, 2016.

<sup>[58]</sup> Parcel Delivery. The Future of the Last Mile. McKinsey & Company. September 2016.

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throughout Northumberland County over the 2021 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth, but will also influence the form, density and location of residential and non-residential development. These broad drivers and disruptive factors are briefly discussed below.

### ***3.4.1 What Drives Population and Employment Growth?***

As a starting point, it is important to recognize that future population and employment growth within Northumberland County is strongly correlated with the growth outlook and competitiveness of the economy within the County and the surrounding region – which in this case is largely represented by the G.G.H. The G.G.H. represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents a portion of the commuter-shed for Northumberland County. Potential employment opportunities within the County and the surrounding commuter-shed represent the primary driver of net migration to this area.

The employment base within Northumberland County and the surrounding commuter-shed can be grouped into two broad categories – export-based sectors and community-based sectors – the latter primarily referring to local population-serving employment. Export-based sectors are comprised of industries (i.e., economic clusters) that produce goods that reach markets outside the community (agriculture and primary resources, manufacturing, research and development as well as other knowledge-based industries). Local industries also provide services to temporary and/or other residents of the County not captured by Census data as part of the permanent population base, such as hotels, restaurants, tourism-related sectors, colleges and universities, as well as businesses related to financial, professional, scientific and technical services.

Economic growth in the regional export-based economy generates wealth and economic opportunities which, in turn, stimulate community-based or population-related employment sectors, including retail trade, accommodation and food and other service sectors. Economic development subsequently drives the need for labour force growth which is largely generated from positive net migration. Ultimately, population growth in Northumberland County within the 0-64 age group will continue to be largely driven by net migration associated with the working-age population and their dependents (i.e., children, spouses not in the labour force, others). On the other hand, population growth of the County's 65+ population will continue to be largely driven by the aging of the County's existing population and, to a lesser extent, the attractiveness and affordability



of the County to new seniors. A more detailed discussion of the long-term economic, socio-economic and demographic drivers of long-term population and employment growth in Northumberland County is provided in the subsections below.

### **3.4.2 Outward Growth Pressure**

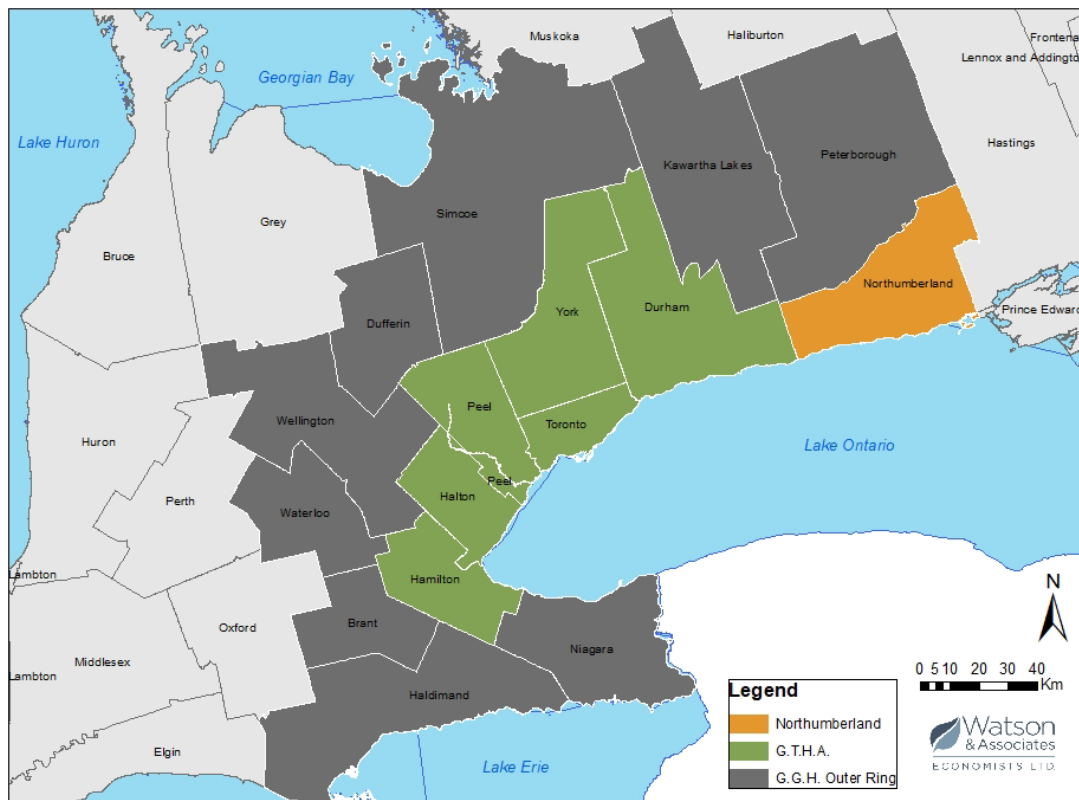
As noted above, Northumberland County is located in one of the fastest growing Cities/Regions in North America, known as the G.G.H. This region comprises the municipalities that make up the Greater Toronto and Hamilton Area (G.T.H.A.), as well as the surrounding Regions/Counties within Central Ontario, known as the G.G.H. Outer Ring, which extends from Haldimand County in the southwest to Simcoe County in the north, to Peterborough County in the northeast (refer to Figure 3-9). With a robust economy and diverse mix of export-based employment sectors, the G.G.H. is highly attractive to new businesses and investors on an international level. The G.G.H. also has a strong appeal given the area's regional infrastructure (i.e., Toronto Pearson International Airport, other regional airports, provincial highways, inter-modal facilities), access to labour force, post-secondary institutions, and proximity to the United States (U.S.) border. In turn, this continues to support steady population and housing growth within this region, largely driven by international and inter-provincial net migration to the area.

The G.G.H. represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The industrial and office commercial real estate markets within the G.G.H. are significant, having the third and sixth largest inventories, respectively, in North America.





Figure 3-9  
Northumberland County within the Context of the Greater Golden Horseshoe (G.G.H.)



Source: Watson & Associates Economists Ltd., 2021.

Figure 3-10 through Figure 3-12 summarize the long-term population employment growth forecast for the G.G.H. between the G.T.A. and the G.G.H. Outer Ring. The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of 5.3 million people (153,000 annually), or 1.3% annually between 2016 and 2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase from 4.6 million in 2016 to 7.0 million in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051.

Figure 3-10 and Figure 3-11 identify that the G.T.H.A. historically experienced a higher rate of population and employment relative to the G.G.H. Outer Ring over the 2001 to 2016 period. Looking forward, forecast annual population and the employment growth rate of the G.G.H. Outer Ring are anticipated to increase significantly, driven by continued outward growth pressure from the G.T.H.A. and steady net migration. In fact,



the forecast annual rate of employment growth in the G.G.H. Outer Ring is expected to exceed that of the G.T.H.A. between 2016 and 2051.

**Figure 3-10**  
Historical and Forecast Population Growth for the Greater Golden Horseshoe (G.G.H.), 2001 to 2051

| Area                | 2001 Population  | 2016 Population  | 2051 Population   | 2001 to 2016 Total Population Growth | 2001 to 2016 Annual Population Growth Rate | 2016 to 2051 Total Population Growth | 2016 to 2051 Annual Population Growth Rate |
|---------------------|------------------|------------------|-------------------|--------------------------------------|--|--------------------------------------|--|
| G.T.H.A.            | 5,808,000        | 7,183,000        | 11,172,000        | 1,375,000                            | 1.4%                                       | 3,989,000                            | 1.3%                                       |
| G.G.H. Outer Ring   | 2,046,000        | 2,355,000        | 3,703,000         | 309,000                              | 0.9%                                       | 1,348,000                            | 1.3%                                       |
| <b>Total G.G.H.</b> | <b>7,854,000</b> | <b>9,538,000</b> | <b>14,875,000</b> | <b>1,684,000</b>                     | <b>1.3%</b>                                | <b>5,337,000</b>                     | <b>1.3%</b>                                |

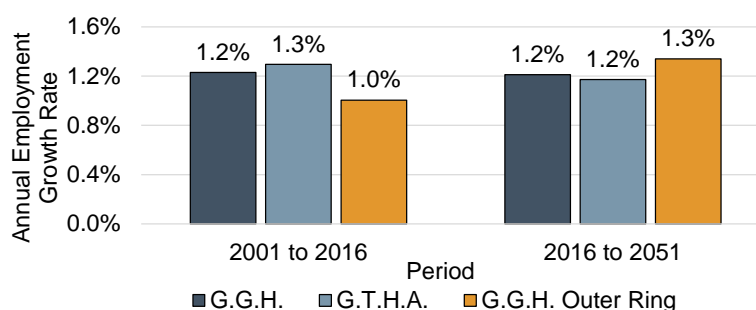
Source: 2001 to 2016 derived from Statistics Canada Census. 2051 from A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.

**Figure 3-11**  
Historical and Forecast Employment Growth for the Greater Golden Horseshoe (G.G.H.), 2001 to 2051

| Area                | 2001 Employment  | 2016 Employment  | 2051 Employment  | 2001 to 2016 Total Employment Growth | 2001 to 2016 Annual Employment Growth Rate | 2016 to 2051 Total Employment Growth | 2016 to 2051 Annual Employment Growth Rate |
|---------------------|------------------|------------------|------------------|--------------------------------------|--|--------------------------------------|--|
| G.T.H.A.            | 2,938,000        | 3,564,000        | 5,360,000        | 626,000                              | 1.3%                                       | 1,796,000                            | 1.2%                                       |
| G.G.H. Outer Ring   | 890,000          | 1,034,000        | 1,650,000        | 144,000                              | 1.0%                                       | 616,000                              | 1.3%                                       |
| <b>Total G.G.H.</b> | <b>3,828,000</b> | <b>4,598,000</b> | <b>7,010,000</b> | <b>770,000</b>                       | <b>1.2%</b>                                | <b>2,412,000</b>                     | <b>1.2%</b>                                |

Source: 2001 to 2016 derived from Statistics Canada Census. 2051 from A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.

**Figure 3-12**  
Historical and Forecast Annual Employment Growth Rate for the Greater Golden Horseshoe (G.G.H.), 2001 to 2051



Source: 2001 to 2016 derived from Statistics Canada Census. 2051 from A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd., 2021.

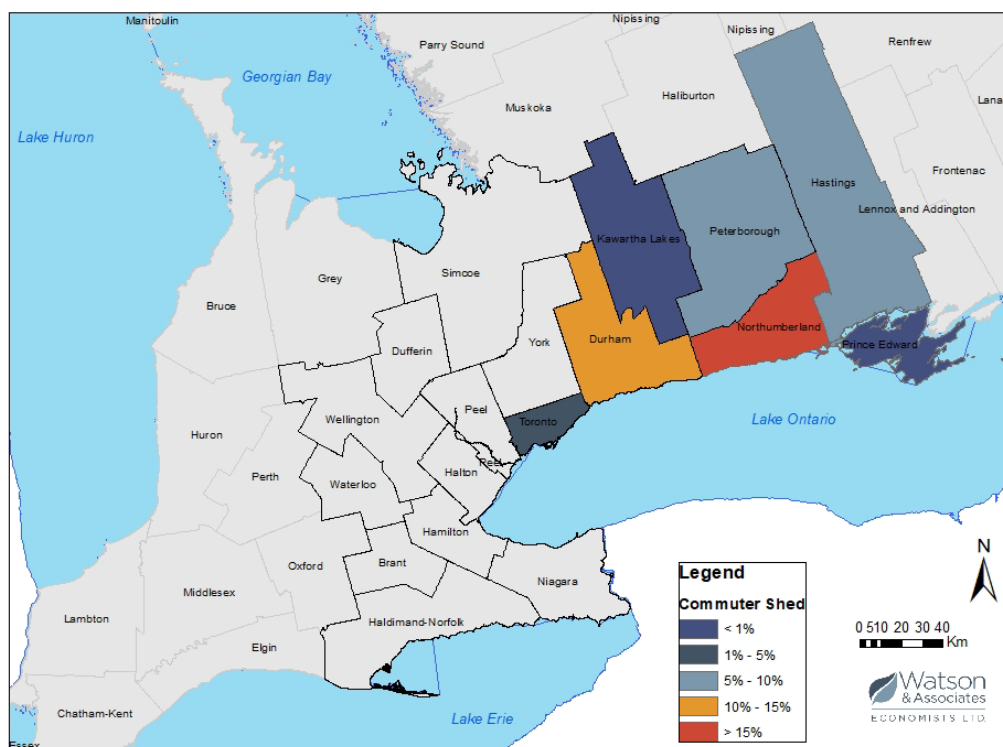


Due to its geographic location within the eastern region of the G.G.H. Outer Ring, Northumberland County is forecast to experience significant outward growth pressure over the next several decades largely from G.T.H.A. municipalities in the west, which have been amongst the fastest growing municipalities in Ontario in recent decades. The strength of the broader regional G.G.H. economy, in particular the G.T.H.A, also presents an opportunity for Northumberland County's economy and its residents within commuting distance to this growing regional employment market.

As displayed in Figure 3-13, in 2016, 65% of Northumberland residents worked within the County, while the rest commuted outside Northumberland for work. Durham Region represented the largest employment hub outside Northumberland County, as it employed 14% of Northumberland residents. According to the Growth Plan, 2019, the Northumberland commuter-shed is expected to grow by approximately 680,000 jobs between 2016 and 2051. As this surrounding commuter-shed grows, Northumberland will continue to be a desirable location for these workers to live, leading to steady population growth in the County.



Figure 3-13  
Northumberland County  
Commuting Trends, 2016



Source: Watson & Associates Economists Ltd., 2021.

### 3.4.3 County Economic Opportunities

Northumberland County is characterized by a blend of vibrant urban communities, rural settlement areas and rural countryside. The County's urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. As previously noted, COVID-19 has acted as a near-term driver of housing demand, led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade "city lifestyles" for "smaller town living."

As previously identified, the existing employment base in Northumberland County is concentrated in manufacturing, health care, retail, and accommodation and food services. Each of these employment sectors is anticipated to experience moderate to steady employment increases, largely driven by strong population growth as well as continued economic diversification within the County and surrounding region. It is also



noted that a number of emerging, less concentrated knowledge-based sectors, including financial services, professional, scientific and technical services, and real estate and rental leasing, are also anticipated to experience steady employment growth over the next several decades.

Despite a relatively modest regional growth outlook for manufacturing employment, this sector continues to be a dominant component of the County's industry base. Looking forward, opportunities exist mainly for small to mid-sized firms that will benefit from the economic synergies offered between the County and the larger and growing employment markets within the Region of Durham, the City of Peterborough, and other neighbouring municipalities.

Northumberland County is also anticipated to accommodate steady employment growth in the transportation and warehousing sector over the next several decades, due to its location along the Highway 401 corridor, most notably in the Town of Cobourg and the Municipality of Port Hope. In summary, rising industrial land prices and diminishing industrial land supply within the larger urban centres of the G.T.H.A. is anticipated to steadily increase demand for land-expansive industrial uses within this sector to outer regions of the G.G.H. and beyond, including Northumberland County.

The County also benefits from a vast geography of agricultural and rural landscapes as tourist destinations.<sup>[59]</sup> Located an hour's drive east of Toronto, Northumberland County offers a broad range of entertainment and dining options as well social events and festivals, which attract a growing number of people (both residents and visitors) to the County every year. The Ministry of Heritage, Sport, Tourism, and Culture Industries includes Northumberland County as part of Ontario Tourism Region 8 (Kawarthas and Northumberland).<sup>[60]</sup> Although boundaries of the Province's tourism regions are large, making it difficult to capture more localized tourism-related data, the data trends provide

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<sup>[59]</sup> The Big Apple Restaurant is a popular tourist stop for visitors in the County. The 30-foot apple structure can be seen along Highway 401 and draws visitors in to learn about Northumberland's apple history. The 24 different trails, including two provincial parks (Ferris and Presqu'île Provincial Park) that run throughout the County provide an opportunity to further explore the area. Surrounded by three bodies of water, Lake Ontario, Rice Lake and the Trent River, Northumberland County offers sandy public beaches.

<sup>[60]</sup> Consists of data on visitors, visitor spending, accommodations, and tourism-related business establishments.



insight on tourism trends for the broader region. For example, approximately 95% of visitor trips to this region are either for pleasure and visiting family and friends. Day trips in this area make up approximately 50% of the total visits, while the remainder stay overnight and spend an average of 1.6 nights in the area. This suggests the County is benefitting from its proximity to the G.T.H.A. and has opportunities to further attract new day trippers and over-night visitors resulting from steady regional population growth.

In terms of visitor spending, approximately 46% is on food and beverage. Visitor spending habits, combined with regional population growth suggest that economic growth opportunities will continue in the food and beverage industry in the area over the long term. Due to the importance of tourism in the area, the Business & Entrepreneurship Centre Northumberland (B.E.C.N.) was formed as part of an initiative of the Ontario Ministry of Research and Innovation, in partnership with Northumberland County. The purpose of the B.E.C.N. is to help establish, grow, and retain businesses that are in the retail, service, and hospitality industries.

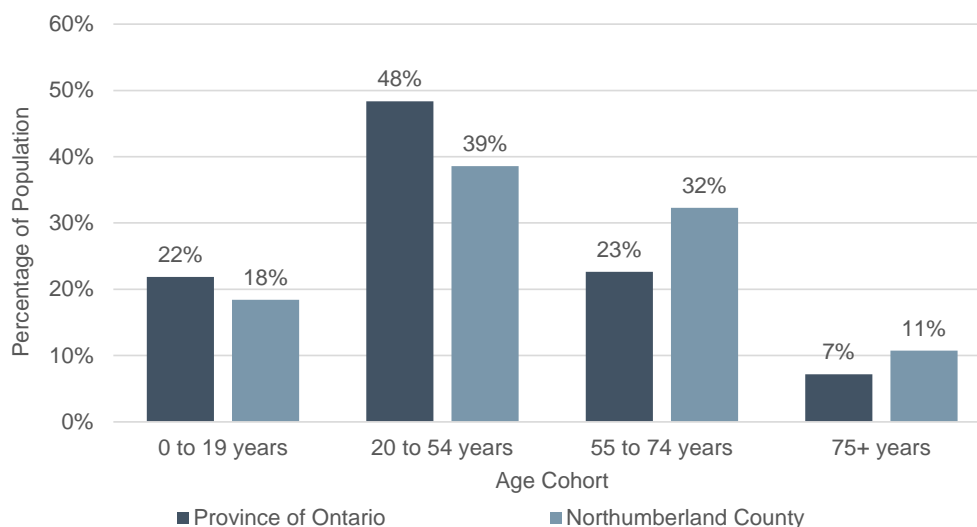
As the local employment base and economy within Northumberland County and surrounding commuter-shed continue to grow and diversify, the County will increasingly become a desirable location for new residents, leading to steady population growth across the County. As such, raising the economic profile of Northumberland County by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy should represent a key long-term economic development strategy for the County.

#### ***3.4.4 Attractiveness to the 55+ Age Group***

Population growth of the 55+ age group across Ontario will continue to be a key driver of housing growth in Northumberland County over the next 30 years. For the Province of Ontario as a whole, the percentage of the 55+ age group to the total population is projected to increase from 30% in 2016 to 33% in 2046, as illustrated in Figure 3-14 and Figure 3-15. Over the same time period, the share of the 55+ age group in Northumberland County is expected to increase from 43% to 48%.



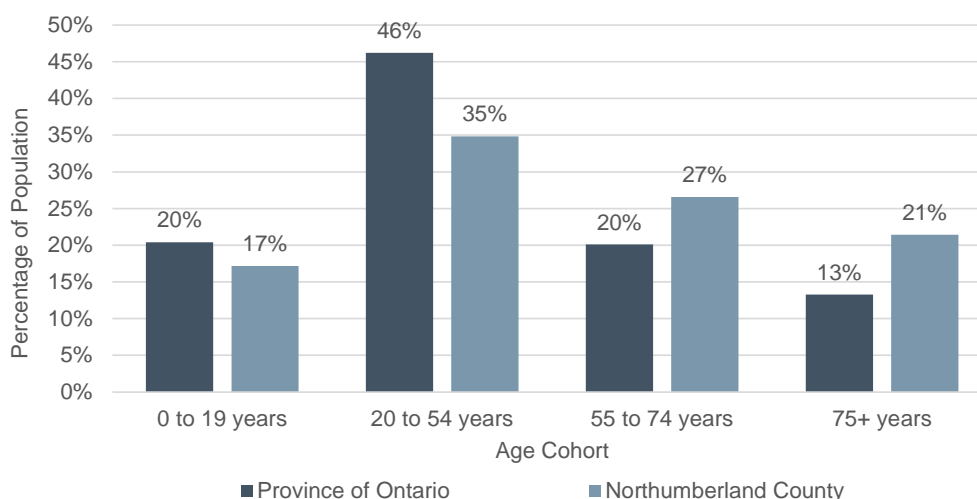
**Figure 3-14**  
**Population by Age Cohort**  
**Province of Ontario and Northumberland County, 2016**



Note: Population figures include net Census undercount.

Source: 2016 data from Statistics Canada Census, derived by Watson & Associates Economists Ltd., 2021.

**Figure 3-15**  
**Population by Age Cohort**  
**Province of Ontario and Northumberland County, 2046**



Note: Population figures include net Census undercount.

Source: 2046 data for the Province of Ontario from the Ministry of Finance Population Projections, Summer 2021. 2046 figure for Northumberland County by Watson & Associates Economists Ltd., 2021.





Net migration to Northumberland County of people in the 55+ age category is anticipated to be largely from the G.T.H.A., particularly the City of Toronto, Durham Region, and York Region.

Future housing demand across Northumberland County generated by the 55+ age group is anticipated to remain strong over the next decade, driven by the aging of the Baby Boom population.<sup>[61]</sup> This will generate an increasing need to accommodate a growing number of seniors in housing forms that offer a variety of services ranging from independent living to assisted living and full-time care. On the other hand, a growing wave of new Northumberland County residents will be seeking housing opportunities that are geared towards active lifestyles and recreation.

While strong net-migration within the 55+ age group generates considerable economic development opportunities for the broader region, the aging of the County's population base also poses challenges for the County. More specifically, the aging of the population and declining population growth resulting from natural increase (i.e., births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within Northumberland County, and subsequently the regional labour force participation rate over the long term. Similar to the Province as a whole, Northumberland County will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions. It is important to recognize these demographic trends, as they are anticipated to potentially constrain the rate of population and economic growth expected across the County over the next several decades.

It is also important to recognize that forecast population growth rates are not anticipated to be homogenous across the County's urban and rural areas. Throughout the County's rural areas, population growth is anticipated to be slow over the next several decades in areas that are experiencing limited new housing development and an aging population. Conversely, the aging population base is also anticipated to place increasing development pressures on Urban Areas for high-density apartments and condominiums, seniors' housing, affordable housing, adult lifestyle housing, which cannot be provided for in the County's other Hamlets and the surrounding Rural Areas.

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<sup>[61]</sup> Defined as residents born between 1946 and 1964.



Given the diversity of the 55-74 and 75+ population age groups, forecast housing demand across the County between these demographic groups is anticipated to vary considerably. Housing demand within the 55-74 age group is anticipated to be relatively strong for ground-oriented housing forms (i.e., single detached, semi-detached and townhouses) provided in locations that offer proximity to urban amenities, municipal services, and community infrastructure.

With respect to the 75+ age group, the physical and socio-economic characteristics of this age group (on average) are considerably different from those of younger seniors, empty nesters, and working adults with respect to income, mobility, and health. Typically, these characteristics represent a key driver behind the increased propensity of the 75+ population age group for medium- and high-density housing forms (including seniors' housing) that are in proximity to municipal and community services (e.g., health care services) as well as other community facilities that typically attract this age group.

### ***3.4.5 Attracting Millennials and Future Generations***

Future housing needs in Northumberland County will be increasingly impacted by the Millennial generation. While there is no standard age group associated with the Millennial generation, persons born between 1980 and 1992 best fit the definition of this age group. Millennials represent a large age cohort in Canada, rivaling the Baby Boom generation in terms of size, and impacts on the real estate market and labour force base. As of 2016, Millennials accounted for approximately 12% of Northumberland County's population, lower than the Ontario provincial average of 17%.<sup>[62]</sup>

Home ownership is considered important for most Millennials. A recent Royal LePage study found that nearly half the Canadians aged 25-35 owned their home, and that 68% who currently are not homeowners planned to purchase a home in the next five years, with 72% being confident in their financial outlook. Nearly two-thirds of this age group who are employed or seeking employment feel the ability to work remotely for an employer is important, and approximately half said this has increased their likeliness to move further from their place of work. In total, nearly two in five are considering a move to a less-dense area due to the COVID-19 pandemic, while approximately half said COVID-19 did not impact their desire to move into less-dense areas. Given an option, 45% indicated they would prefer living in a city, while 47% said they would choose small

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<sup>[62]</sup> Statistics Canada, Census 2016, population by age.



town or country living. The most attractive features of living in a city were walkability (21%) and access to events, attractions and other entertainment options (21%), followed by diversity of people and cultures (18%), and more employment opportunities (17%). The top reasons for wanting to move to a less-dense area included access to more outdoor space (62%) and lower-priced homes (61%), followed by the affordability of larger properties (51%).

Much of this demand for future home ownership appears to be the desire for additional floor space and a yard, in many cases to accommodate a growing family. Anticipated housing demand by the Millennial population is anticipated to drive future housing needs across Northumberland County, largely in Urban Areas, which provide options for first-time homebuyers as well as “move-up” buyers with growing families. Housing demand is anticipated to be primarily strong for medium-density development, such as townhouses, back-to-back townhouses, stacked townhouses and higher-density development such as low-rise apartments, as well as single and semi-detached dwellings.

Generation Z, the cohort which directly follows the Millennial generation, is now entering the real estate and labour market. Demographers and researchers typically use the mid-1990s to mid-2000s as starting birth years to describe the Generation Z cohort. For the purposes of this study, we have assumed that those born between 1993 and 2005 (16-28 years of age as of 2021) comprise Generation Z. As of 2016, this cohort represented 13% of Northumberland County’s population base; however, at that time, this population base was primarily a youth population base (11-23 years of age) and not a major component of the housing market. By 2046, the number of Generation Z residents is forecast to remain steady at 13% of total population growth within Northumberland County. Over the next several decades, the Generation Z population is also anticipated to place increased demand on low-, medium- and high-density ownership and rental housing.

It is also important to recognize the impact of Millennials and Generation Z on the nature of future employment growth, which will be increasingly driven by the knowledge-based economy. Compared to older age groups, Millennials and Generation Z have a higher average level of education attainment in Canada. Millennials are considered the most educated generation; nearly 70% of Millennials have a post-secondary certificate, diploma and/or degree compared to the previous generation, Generation X, at approximately 55%. This bodes well in accommodating labour within the knowledge-



based economy; however, it has posed a challenge in accommodating employment in other sectors of the economy, including unskilled employment, as a greater share of the Baby Boom generation enters retirement. The extent to which Northumberland County can capitalize on potential demand from younger demographic groups is subject to a number of economic and socio-economic variables (e.g., relative housing costs/affordability, local and regional employment opportunities, broadband infrastructure, lifestyle preferences, local amenities, community services and perceived quality of life).

### **3.4.6 Quality of Life**

Quality of life is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in relocation decisions. Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities, and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences. Looking forward, these “soft” factors represent a key reason why the County’s relative competitive position is likely to strengthen over time, by attracting new residents and business development over the long term.

## **3.5 Review of Historical Census Population and Housing Growth Trends**

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### **3.5.1 Northumberland County Population Growth, 2001 to 2016**

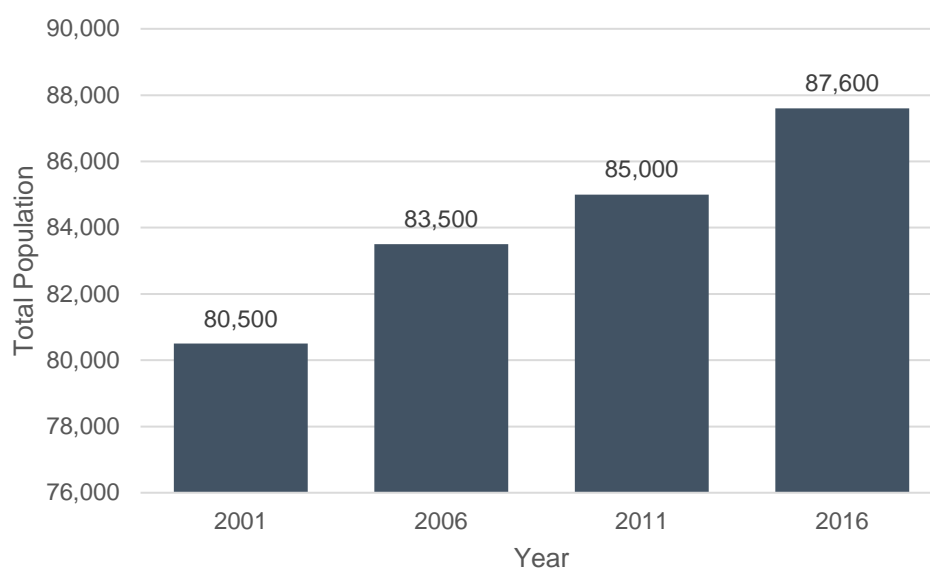
Figure 3-16 summarizes historical population for Northumberland County over the 15-year period from 2001 to 2016. As illustrated, the County’s population base increased from 80,500 in 2001 to 87,600 in 2016. Over the past decade, the population base within the County has increased by 7,100 persons, or approximately 0.6% per year. As a comparison, the average annual population growth rate within the G.G.H. during this time period was 1.3%.

Figure 3-17 summarizes the annual population growth rate of all upper-tier/single-tier municipalities within the Outer Ring of the G.G.H. Overall, this area achieved an average annual population growth rate of 1.0% over the 2001 to 2016 period. As summarized in Figure 3-17, the City of Barrie, the County of Simcoe and the City of



Guelph experienced the highest rate of annual population growth within the G.G.H. Outer Ring. Northumberland County's growth rate was close to the middle of the annual population growth range of G.G.H. Outer Ring municipalities, which ranged from 0.2% in the County of Haldimand to 2.0% in the City of Barrie. Over the 2001 to 2016 historical period, Northumberland County represented 2% of population growth within the G.G.H. Outer Ring.

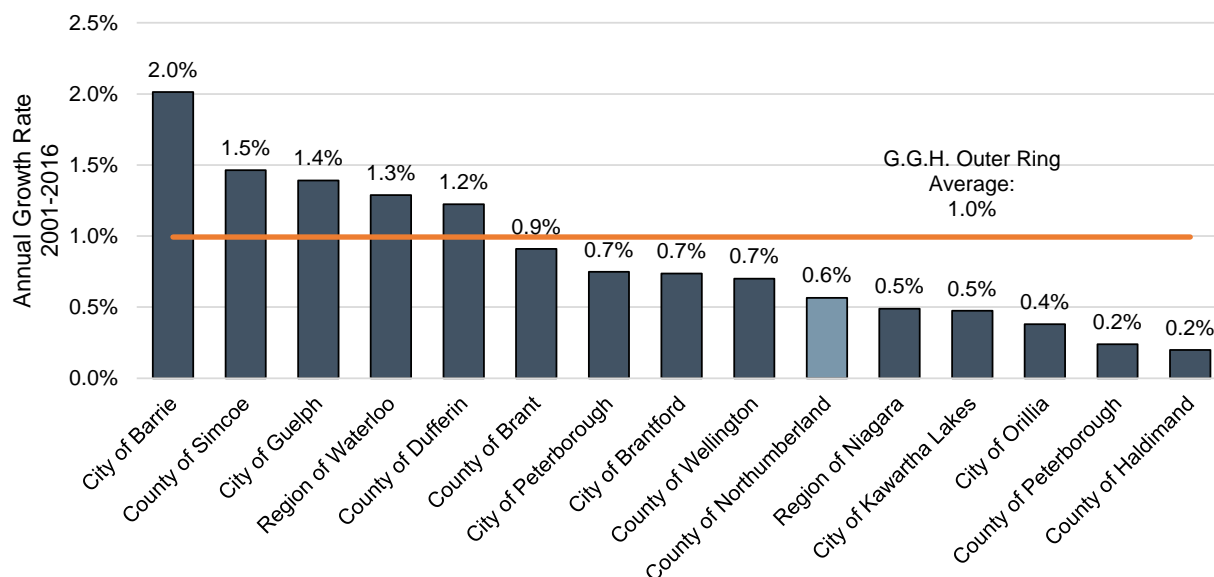
Figure 3-16  
Northumberland County  
Historical Total Population, 2001 to 2016



Note: Population includes net Census undercount estimated at approximately 2.3%.  
Source: Derived from Statistics Canada by Watson & Associates Economists Ltd., 2021.



Figure 3-17  
G.G.H. Outer Ring  
Historical Total Population, 2001 to 2016



Upper/Single-Tier G.G.H. Outer Ring Municipality

Source: Derived from Statistics Canada Demography Division by Watson & Associates Economists Ltd., 2021.

### 3.5.2 Northumberland County Trends in Total Population Age Structure

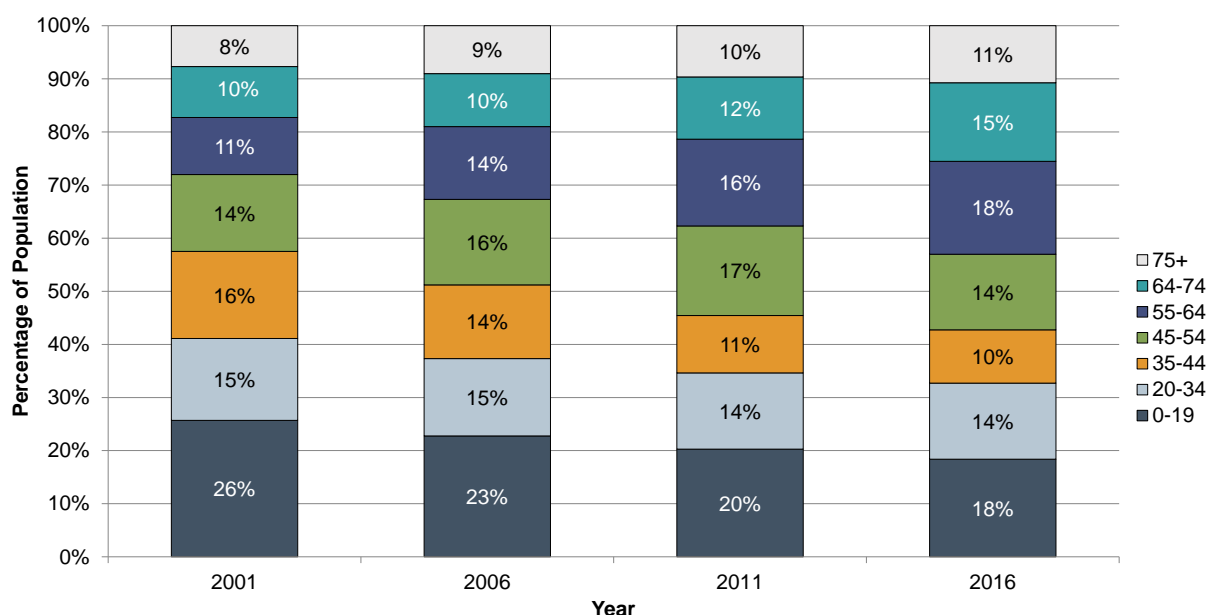
Figure 3-18 summarizes historical trends in population structure by major age group over the 2001 through 2016 period. Key observations regarding Northumberland County's historical population by age include the following:

- In 2016, the 0-19 age group (youth population) in Northumberland County accounted for 18% of the total population. Over the 2001 to 2016 period, the population in this age cohort decreased by 4,600, declining in population share from 26% to 18%.
- The County's young adult/adult share of the population (20-54 years of age) declined over the same period, comprising approximately 39% of the population in 2016:
  - The 20-34 age cohort (young adults), which comprised an estimated 14% of the population in 2016, declined slightly from 15% in 2001;



- The percentage of the 35-44 age group decreased from 16% in 2001 to 10% in 2016; and
- The percentage of adults 45-54 years old has remained stable at 14% in 2001 as well as 2016;
- Collectively, the share of the County's 55+ population base increased significantly over the same period. More specifically:
  - The 55-74 age group (empty nesters/younger seniors) increased by 12 percentage points between 2001 and 2016, from 20% to 32%; and
  - The 75+ age group (older seniors) increased moderately from 8% in 2001 to 11% in 2016. Looking forward over the next three decades, the share of the County's population in the 75+ age group is anticipated to increase significantly, driven by the aging of the Baby Boom population. This is anticipated to place increasing demand on the need for seniors' housing, affordable housing, as well as social services to support the County's growing population base of seniors.

Figure 3-18  
Northumberland County  
Population by Age Cohort, 2001 to 2016



Note: Population includes net Census undercount estimated at approximately 2.3%.

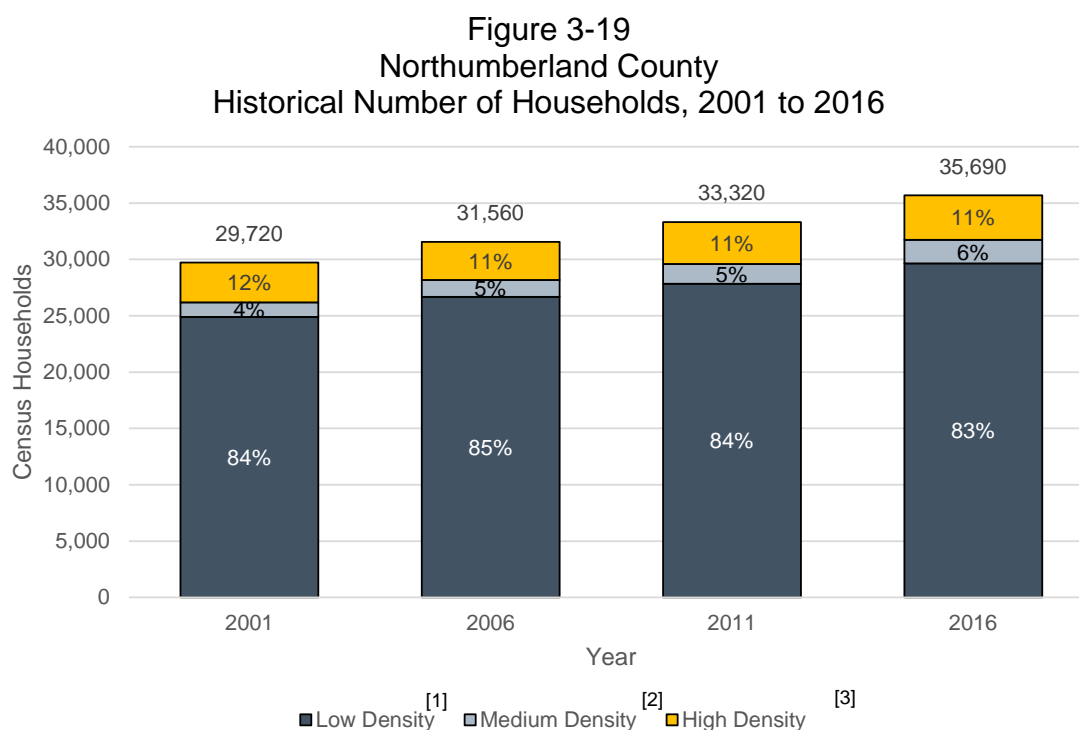
Source: Population forecast by age derived from 2001 to 2016 Statistics Canada Annual Demographic Statistics by Watson & Associates Economists Ltd., 2021.





### 3.5.3 Historical Census Housing Trends, 2001 to 2016

Similar to population growth trends, Northumberland County has recently experienced a steady rate of housing growth, as measured by Statistics Canada Census data between 2001 and 2016. During this historical period, the County's housing base increased by approximately 6,000 households from 29,700 to 35,700, which represents an increase of approximately 400 housing units per year. Figure 3-19 summarizes housing by density type between 2001 and 2016. As previously discussed, low-density households largely include single and semi-detached units, townhouses and apartments in duplexes comprise medium-density households, while apartments are included in the high-density category. Low-density housing made up the majority of new housing development over the 2001 to 2016 period (at 83% of the overall housing stock in 2016). Over the next 30 years, it is anticipated that housing development within the County will be increasingly concentrated in medium- and high-density forms, largely driven by needs related to housing affordability and the aging of the County's population base.



[1] Includes single detached and semi-detached units.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: Derived from Statistics Canada Census Profile, 2001 to 2016 by Watson & Associates Economists Ltd., 2021.



### **3.5.4 Housing Occupancy Trends within Northumberland County**

#### **3.5.4.1 Household Headship Rates**

A household headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e., cohort). Between 2001 and 2016, Northumberland County's total headship rate increased from 37% to 41% (refer to Appendix B for additional details). An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age, family type and family structure. While major fluctuations in headship rates are not common over time, the ratio of household maintainers per capita varies by population age group. For example, a municipality with a higher percentage of seniors will typically have a higher household maintainer ratio per capita (i.e., headship rate) compared to a municipality with a younger population. This is because households occupied by seniors typically have fewer children than households occupied by adults under 65 years of age. Accordingly, forecast trends in population age structure provide important insights into future headship rates and average persons per unit (P.P.U.) trends for Northumberland County, which is further discussed below. It is important to note that headship rates by major age group are anticipated to remain relatively stable over the long-term forecast period.

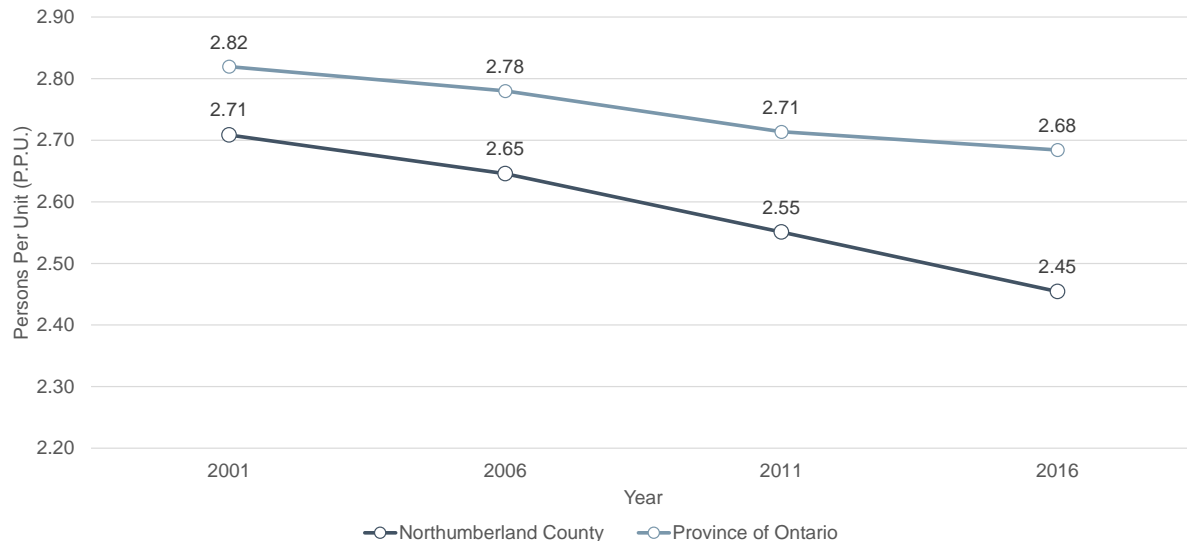
#### **3.5.4.2 Persons Per Unit (P.P.U.)**

Figure 3-20 summarizes trends in average housing occupancy for Northumberland County and the Province of Ontario over the 2001 to 2016 period, expressed as the average number of P.P.U. Trends in household occupancy and age structure are a particularly important statistic for land-use planners, as these trends have broad implications for the amount and type of future housing needs associated with population growth as well as demands for public infrastructure, municipal services and schools. Key observations include the following:

- Average housing occupancy levels for the Province as a whole were higher relative to Northumberland County;
- The average P.P.U. for Northumberland County steadily declined over the 2001 to 2016 period, falling from 2.71 in 2001 to 2.45 in 2016; and
- Similarly, over the same time period, the Province of Ontario's P.P.U. declined from 2.82 in 2001 to 2.68 in 2016.



Figure 3-20  
Northumberland County  
Historical Persons Per Unit (P.P.U.) Trends, 2001 to 2016



Note: Population figures include net Census undercount.

Source: Historical data derived from Statistics Canada Annual Demographic Statistics and Census Profiles by Watson & Associates Economists Ltd., 2021.

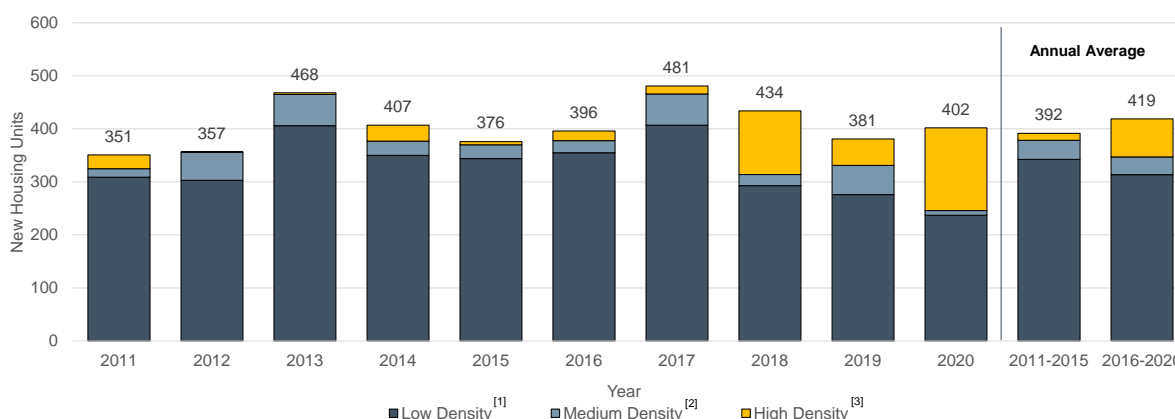
### 3.5.5 Housing Development Trends

Figure 3-21 summarizes total residential building permits by structure type from 2011 to 2020 for Northumberland County. Key observations include:

- The number of units from residential building permits (new units only) issued for Northumberland County between 2011 and 2020 averaged 405 units per year;
- With the exception of 2013, the average number of units from residential building permits increased from 2015, averaging 419 units annually over the 2016 to 2020 period; and
- The average number of units from building permits issued for high-density housing units increased over the past three years, representing 27% of all units from residential permits issued.



Figure 3-21  
Northumberland County  
Residential Building Permit Activity by Housing Type (New Units Only),  
2011 to 2020



[1] Includes single detached and semi-detached units.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Source: Historical building permit data from local municipalities within Northumberland County. 2020 is an estimate by Watson & Associates Economists Ltd., 2021.

## 3.6 Observations

It is recognized that future population and employment growth within Northumberland County is strongly correlated with the growth outlook and competitiveness of the economy within the County and the surrounding region, which is largely represented by the G.G.H.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. Due to its geographic location within the eastern region of the G.G.H. Outer Ring, Northumberland County is forecast to experience significant outward growth pressure over the next several decades largely from the eastern and northern G.T.H.A. upper-tier municipalities, which have been amongst the fastest growing municipalities in Ontario in recent decades.

As of 2016, 44% of Northumberland County's overall population is older than 55. Over the forecast period, the County's population base is expected to continue to steadily age. Looking forward, this growing older population segment is anticipated to be a key driver of higher-density forms of housing growth in Northumberland County as this



group will require a range of housing forms such as low-rise apartments, secondary suites and seniors' residences. Northumberland County is also anticipated to accommodate young adults and new families seeking competitively priced home ownership and rental opportunities across a range of low-, medium- and high-density housing forms. Accordingly, opportunities should be explored to provide a mix of future housing across a range of density types to accommodate all age groups and income levels (including affordable housing options).

Over the past decade, employment growth has been particularly strong in knowledge-based sectors such as real estate and rental and leasing, finance and insurance, health care and social assistance, and accommodation and food services sectors which have experienced notable increases in jobs. Looking forward, it is expected that each of these knowledge-based sectors will continue to represent an increasing component of future job growth within the County's urban Employment Areas and Community Areas, while sectors such as accommodation and food services, tourism and agriculture will drive employment growth in the County's rural areas.

Despite a relatively modest regional growth outlook for manufacturing employment, this sector continues to be a dominant component of the County's industry base. Future opportunities exist mainly for small to mid-sized firms that will benefit from the economic synergies offered between the County and the larger and growing employment markets within the Region of Durham, the City of Peterborough and other neighbouring municipalities. Northumberland County is also anticipated to experience steady employment growth in the transportation and warehousing sector over the next several decades, due to its location along the Highway 401 corridor, most notably in the Town of Cobourg and the Municipality of Port Hope.



## 4. Northumberland County Population and Housing Growth Outlook to 2051

### 4.1 Introduction

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The long-term growth population and employment forecast for Northumberland County, as set out in Schedule 3 of the Growth Plan, 2019, has been comprehensively evaluated herein within the context of historical growth trends, the broader growth outlook for the G.G.H., and the influence of regional growth drivers on the share of G.G.H. growth allocated to Northumberland County. These factors are summarized below and used to rationalize the Growth Plan's 2051 population and employment growth forecast for Northumberland County as the recommended long-term growth scenario.

### 4.2 Long-Term County-Wide Population Forecast

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Figure 4-1 summarizes the current 2051 population and employment forecast for Northumberland County, as per Schedule 3 of the Growth Plan, 2019, relative to historical growth trends between 2001 and 2016. For comparative purposes, the 2051 population and employment forecast for the G.G.H. Outer Ring is also provided, including historical growth trends between 2001 and 2016.<sup>[63]</sup> Noteworthy observations regarding the Growth Plan, 2019 population and employment forecast for the G.G.H. Outer Ring and Northumberland County include the following:

- Annual population and employment growth across the G.G.H. Outer Ring is anticipated to be significantly stronger over the next 35 years in comparison to the past 15 years;
- For Northumberland County, the amount of annual population growth achieved between 2001 and 2016 is anticipated to double over the 2016 to 2051 forecast period; and

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<sup>[63]</sup> The G.G.H. Outer Ring comprises the Central Ontario municipalities located within the G.G.H. but outside the Greater Toronto and Hamilton Area (G.T.H.A.).

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- Relative to the 2001 to 2016 period, forecast annual employment growth for Northumberland County is forecast to increase by a factor of four over the long-term planning horizon.

Figure 4-1  
Northumberland County and G.G.H. Outer Ring  
Population and Employment Growth Comparison, 2001 to 2051

| Municipality/Area     | Population |           |           | 2001 to 2016            |                          |                               | 2016 to 2051            |                          |                               |
|-----------------------|------------|-----------|-----------|-------------------------|--------------------------|-------------------------------|-------------------------|--------------------------|-------------------------------|
|                       | 2001       | 2016      | 2051      | Total Population Growth | Annual Population Growth | Annual Population Growth Rate | Total Population Growth | Annual Population Growth | Annual Population Growth Rate |
| Northumberland County | 81,000     | 88,000    | 122,000   | 7,000                   | 500                      | 0.6%                          | 34,000                  | 1,000                    | 0.9%                          |
| G.G.H. Outer Ring     | 2,046,000  | 2,355,000 | 3,703,000 | 309,000                 | 20,600                   | 0.9%                          | 1,348,000               | 38,500                   | 1.3%                          |

| Municipality/Area     | Employment |           |           | 2001 to 2016            |                          |                               | 2016 to 2051            |                          |                               |
|-----------------------|------------|-----------|-----------|-------------------------|--------------------------|-------------------------------|-------------------------|--------------------------|-------------------------------|
|                       | 2001       | 2016      | 2051      | Total Population Growth | Annual Population Growth | Annual Population Growth Rate | Total Population Growth | Annual Population Growth | Annual Population Growth Rate |
| Northumberland County | 29,000     | 31,000    | 44,000    | 2,000                   | 100                      | 0.4%                          | 13,000                  | 400                      | 1.0%                          |
| G.G.H. Outer Ring     | 890,000    | 1,034,000 | 1,650,000 | 144,000                 | 9,600                    | 1.0%                          | 616,000                 | 17,600                   | 1.3%                          |

Note: Population includes net Census undercount.

Source: 2001 to 2016 derived from Statistics Canada Census. 2051 from A Place to Grow. Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020. Ontario.ca/growthplanning.

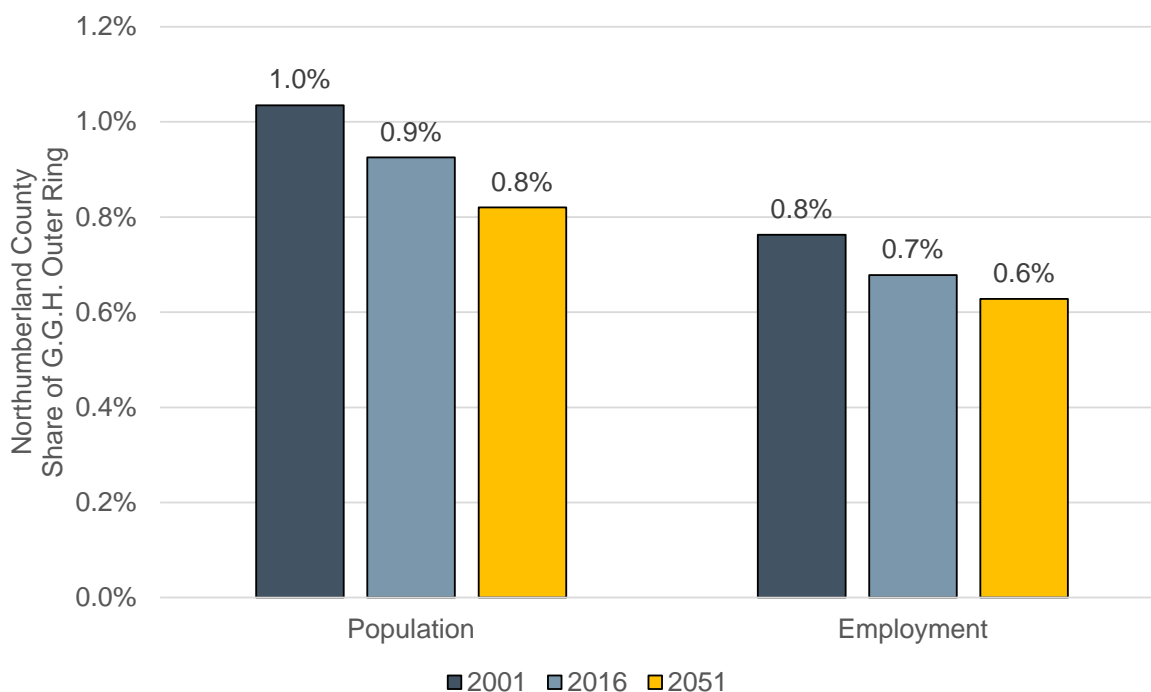
Figure prepared by Watson & Associates Economists Ltd., 2021.

While the rate of forecast population and employment for Northumberland County is considerably higher than historical trends, Northumberland County is anticipated to continue to grow at a slower rate over the 2021 to 2051 planning horizon relative the G.G.H. Outer Ring as a whole. Accordingly, the County's share of population and employment relative to the total G.G.H. Outer Ring is anticipated to continue to gradually decline over the next three decades as summarized in Figure 4-2.





Figure 4-2  
Northumberland County Share of G.G.H. Outer Ring  
Population and Employment, 2001 to 2051 (Schedule 3)



Note: Population figures include net Census undercount.

Source: 2001 to 2016 data derived from Statistics Canada Census and Annual Demographic Statistics. 2051 data from A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020. Ontario.ca/growthplanning. Summarized by Watson & Associates Economists Ltd., 2021.

As previously mentioned, the population living in Northumberland County is getting older. As the County's population continues to age, net migration will become an increasing component of population growth. The aging of the population is also anticipated to place downward pressure on both population and labour force growth over the long term. As such, the level of annual net migration required to achieve the Growth Plan, 2019 population is significantly higher than historical trends achieved between 2001 and 2016 (refer to Figure 4-4 through Figure 4-6, herein). While it is reasonable to expect that forecast annual net migration levels in Northumberland County will be significantly higher relative to historical trends, achieving even higher levels of net migration than what has been identified to generate the County's 2051 population forecast is not considered to be a likely long-term scenario.

Based on the detailed review of the County's long-term growth outlook provided in this report, the 2051 population and employment forecast, as set out in Schedule 3 of the



Growth Plan, 2019, is the recommended long-term growth scenario for Northumberland County. In summary, the Schedule 3 Growth Plan, 2019 forecast for Northumberland County:

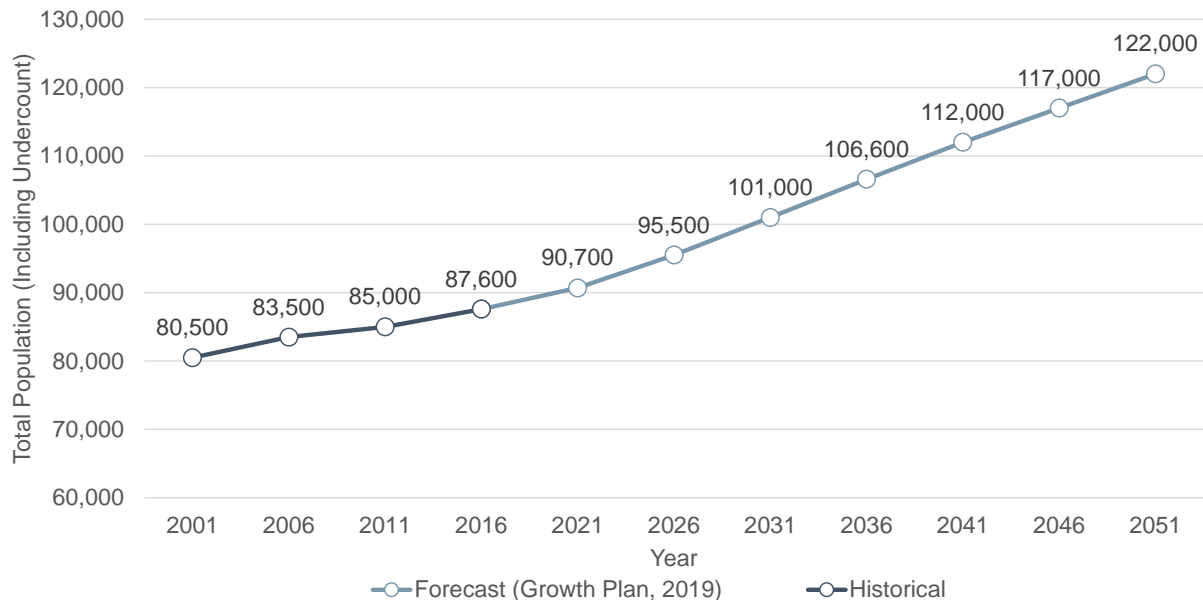
- Represents a reasonable increase in long-term population and employment growth relative to historical trends;
- Accurately identifies the anticipated influence of identified regional and local growth drivers on future development trends across the County; and
- Represents a reasonable change in the share of total population and employment in Northumberland County relative to the G.G.H. Outer Ring as a whole.

In accordance with the detailed review of the County's long-term population and employment growth outlook provided herein, a higher long-term population and employment forecast for Northumberland County is not supported for the purposes of long-term growth management and urban land needs analysis.

Figure 4-3 summarizes Northumberland County's total population growth forecast over the 2016 to 2051 period relative to historical population between 2001 and 2016. By 2051, Northumberland County's total permanent population base is forecast to grow to approximately 122,000. This represents an increase of approximately 34,400 persons between 2016 and 2051, or an average annual population growth rate of approximately 1.0% during this period.



Figure 4-3  
Northumberland County  
Population Growth Forecast to 2051



Note: Population includes net Census undercount estimated at approximately 2.3%. Figures have been rounded.

Source: Historical 2001 to 2016 data derived from Statistics Canada Annual Demographic Statistics. Forecast 2021 to 2051 data derived from A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020, Ontario.ca/growthplanning summarized by Watson & Associates Economists Ltd., 2021.

## 4.3 Components of Population Growth Summary

Figure 4-4 through to Figure 4-6 summarize population growth in Northumberland County by population component, including net migration and natural increase (births less deaths). As previously mentioned, net migration is anticipated to represent the largest component of forecast population growth in Northumberland County. This is a result of diminishing population growth from natural increase due to the aging of the population. Net migration can be broken into three broad categories, including:

- **International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents. Over the last decade, this component of net migration represented a relatively small source of net migration for Northumberland County;



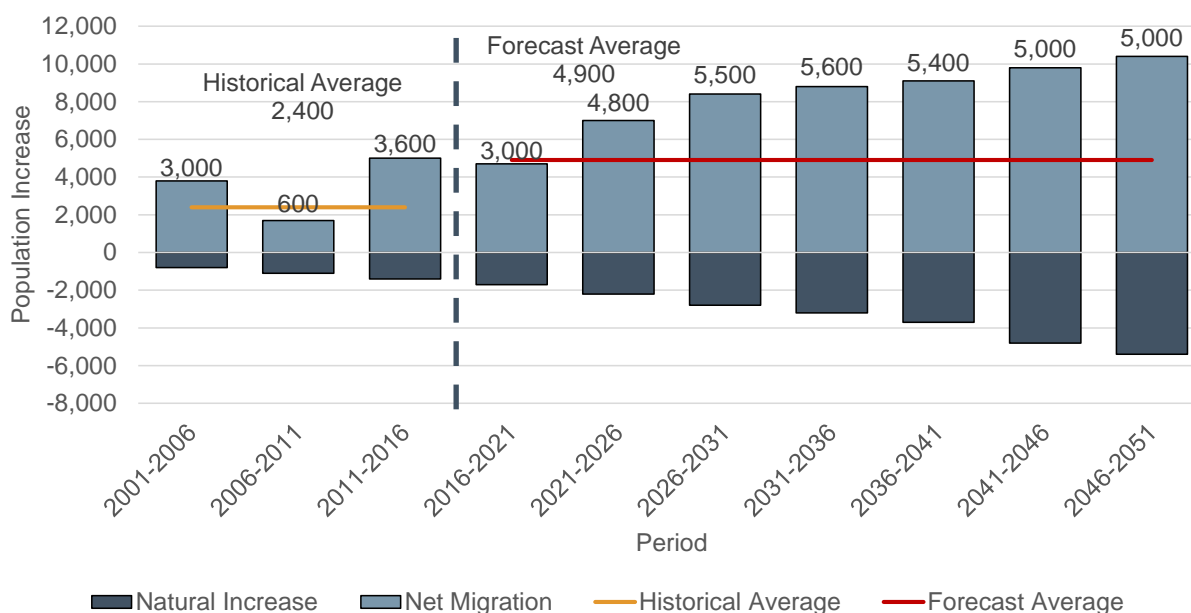
- **Inter-provincial Net Migration** – is comprised of in-migration less out-migration from other Canadian Provinces/Territories. Historically this has also not been a major source of net-migration for Northumberland County; and
- **Intra-provincial Net Migration** – Includes in-migration less out-migration from elsewhere within the Province of Ontario. This has been a significant source of net migration over the last decade for Northumberland County.

Key observations with respect to the components of population growth (Figure 4-4) in Northumberland County include:

- Over the 2016 to 2051 period, population growth within Northumberland County is anticipated to be driven solely from net migration;
- The County is forecast to accommodate nearly 980 net new migrants per year (or 4,900 migrants every five years). Relative to historical trends, this represents a considerable increase (slightly more than double) in the average historical levels of net migration experienced between 2001 and 2016;
- As previously discussed, forecast net migration in Northumberland County is anticipated to be largely driven by the long-term economic growth prospects in the regional economy and surrounding commuter-shed. Local housing growth opportunities are anticipated to be driven by a broad range of demographic groups (i.e., first-time homebuyers, families, empty nesters, and seniors) and the County's attractiveness as a place to work; and
- The County is anticipated to experience relatively strong net migration across most major age groups.



Figure 4-4  
Northumberland County  
Historical and Forecast Population Growth Associated with Net Migration  
and Natural Increase, 2016 to 2051



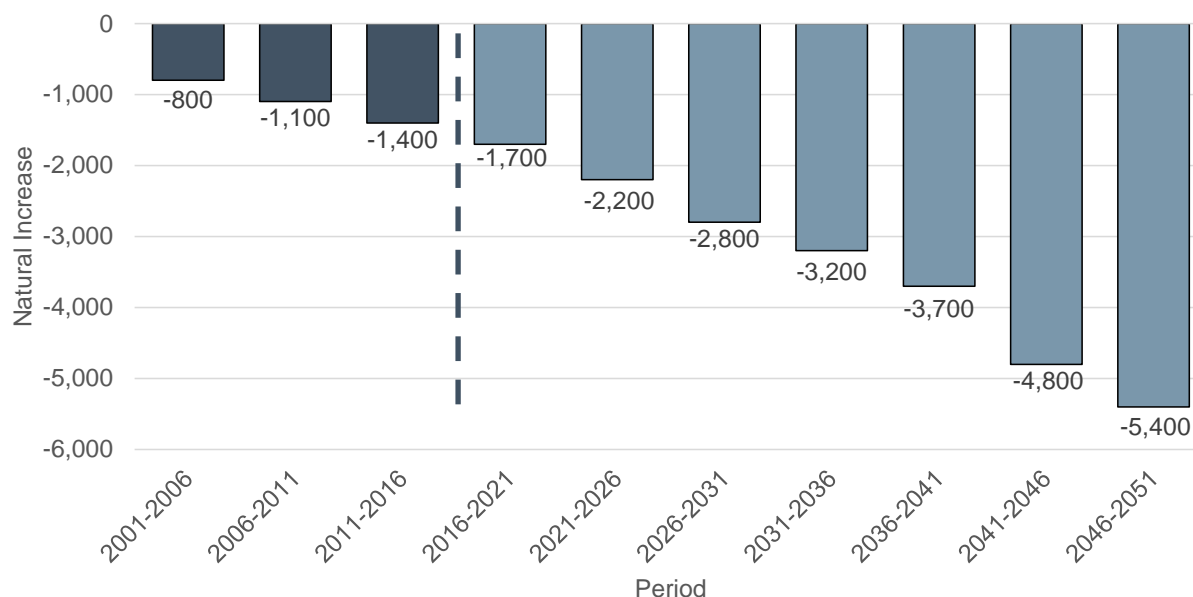
Note: Population figures include net Census undercount estimated at approximately 2.3%. Figures have been rounded and may not add precisely.

Source: Historical 2001 to 2016 data derived from Statistics Canada Annual Demographic Statistics. 2021 to 2051 forecast data prepared by Watson & Associates Economists Ltd., 2021.

Figure 4-5 summarizes forecast population growth associated with natural increase for Northumberland County relative to historical trends, while Figure 4-6 summarizes forecast population growth associated with net migration for the County. As previously illustrated, historical population growth (2001 to 2016) associated with natural increase has been negative in Northumberland County, due to the aging of the population. This trend is anticipated to continue over the forecast period.



Figure 4-5  
Northumberland County  
Historical and Forecast Natural Increase, 2016 to 2051



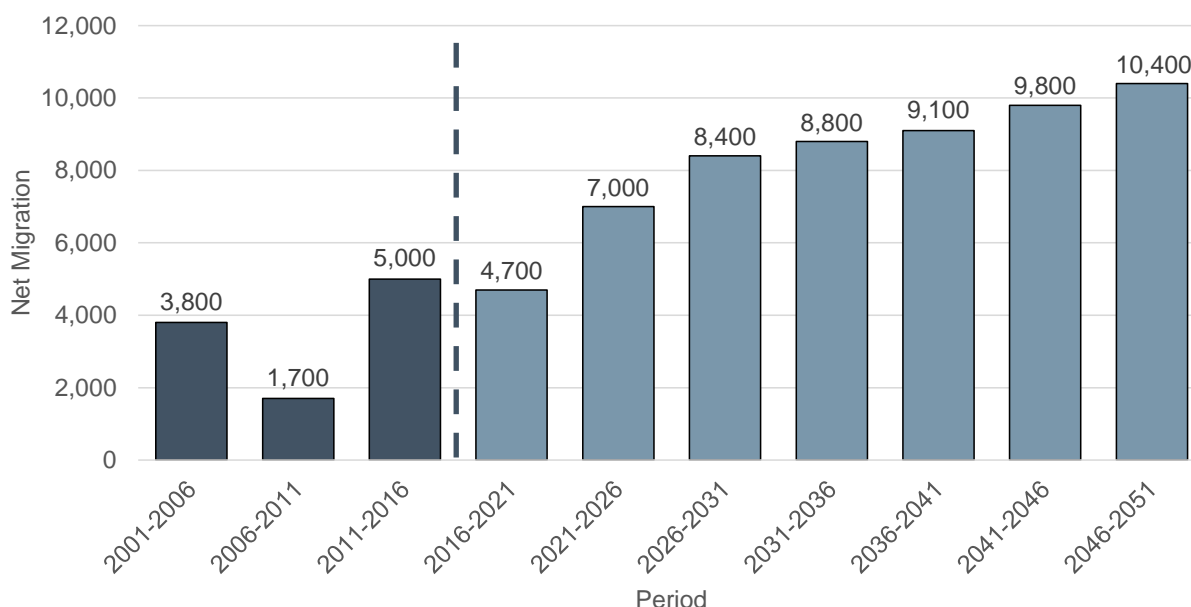
Note: Population figures include net Census undercount estimated at approximately 2.3%. Figures have been rounded and may not add precisely.

Source: Historical 2001 to 2016 data derived from Statistics Canada Annual Demographic Statistics. 2021 to 2051 forecast data prepared by Watson & Associates Economists Ltd., 2021.

As summarized in Figure 4-6, net migration is anticipated to increase significantly over the forecast period compared to historical trends over the past 15 years. Similar to recent historical trends, it is anticipated that a large component of net migration will come from intra-provincial migration, primarily from larger urban centres within the G.T.H.A.



Figure 4-6  
Northumberland County  
Historical and Forecast Net Migration Increase, 2016 to 2051



Note: Population figures include net Census undercount estimated at approximately 2.3%. Figures have been rounded and may not add precisely.

Source: Historical 2001 to 2016 data derived from Statistics Canada Annual Demographic Statistics. 2021 to 2051 forecast data prepared by Watson & Associates Economists Ltd., 2021.

## 4.4 Population Forecast by Age Cohort

Figure 4-7 summarizes the total population growth forecast for Northumberland County by major age group. Additional details regarding the population forecast by age are provided in Appendix C. Key observations include:

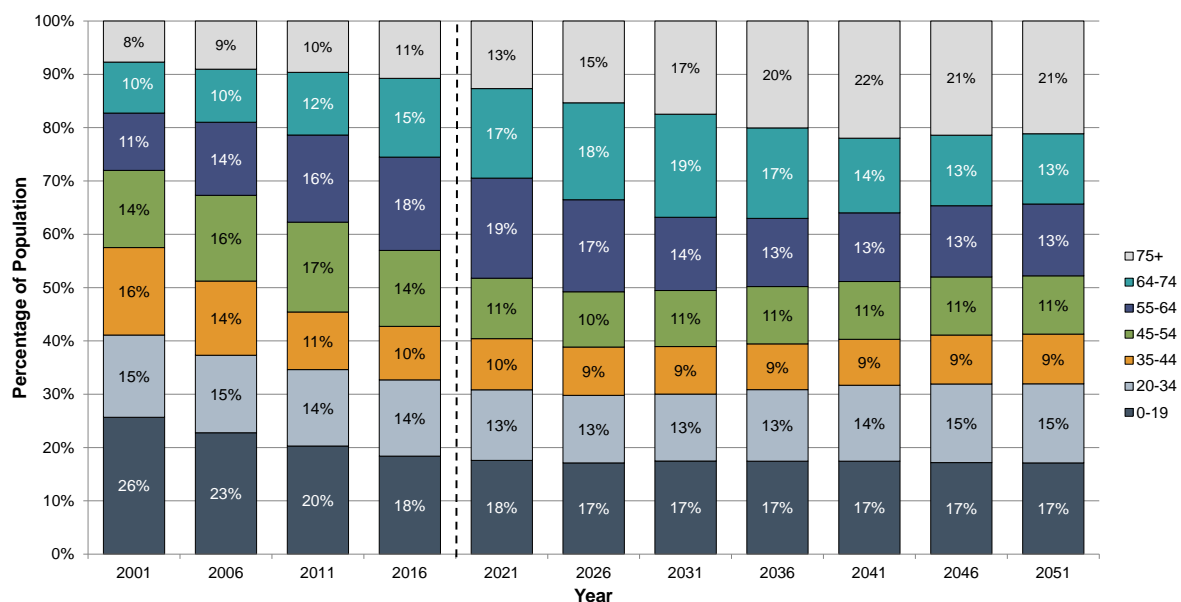
- The percentage of Northumberland County's youth (0-19) is forecast to slightly decline from 18% in 2016 to 17% in 2051;
- The 20-34 age cohort (young adults), which comprised 14% of the population in 2016, is forecast to slightly increase in percentage share to 15% in 2051;
- The share of population in the 35-54 age group (adults) is forecast to remain steady at 24% from 2016 and 2051;
- The percentage of empty nesters/younger seniors (age 55-74) is forecast to decline from 33% to 26%; and





- The percentage of population in the age 75+ age group (older seniors) is forecast to more than double from 11% in 2016 to 21% in 2051. As previously mentioned, this is anticipated to place increasing demand on the need for a broader range of housing options geared towards older adults, such as apartments, seniors' housing and affordable housing. Accommodating an increasing percentage of seniors will also require additional community and social services geared to this age group.

Figure 4-7  
Northumberland County  
Total Population by Major Age Group, 2016 to 2051



Note: Figures may not add precisely due to rounding. Population figures include net Census undercount estimated at approximately 2.3%.

Source: Historical 2001 to 2016 data derived from Statistics Canada Annual Demographic Statistics. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

## 4.5 Seasonal Population and Housing

Northumberland County is located along the shores of Lake Ontario to the south, while Rice Lake and the Trent River form a large section of the County's boundary to the north. The natural heritage system covers most of the northern parts of the County with various provincial parks, wetlands and conservation areas. Existing cottages are



concentrated along Rice Lake, the Trent Severn Waterway and along Presqu'ile Bay in Brighton, as they are desirable locations for seasonal residences and visitors alike.

While seasonal population growth forms a part of the County's overall population growth, it is expected that over the planning horizon this segment will remain relatively stable as additional vacant land availability in these areas is largely constrained by the natural heritage system. Conversions of seasonal dwellings to permanent households will also reduce the seasonal population growth rate but add to the County's permanent population base. Potential seasonal population and housing growth is anticipated to be accommodated in the County's Rural Areas; however, such development has not been captured in the County's growth forecast.

## **4.6 Forecast Trends in Housing Occupancy**

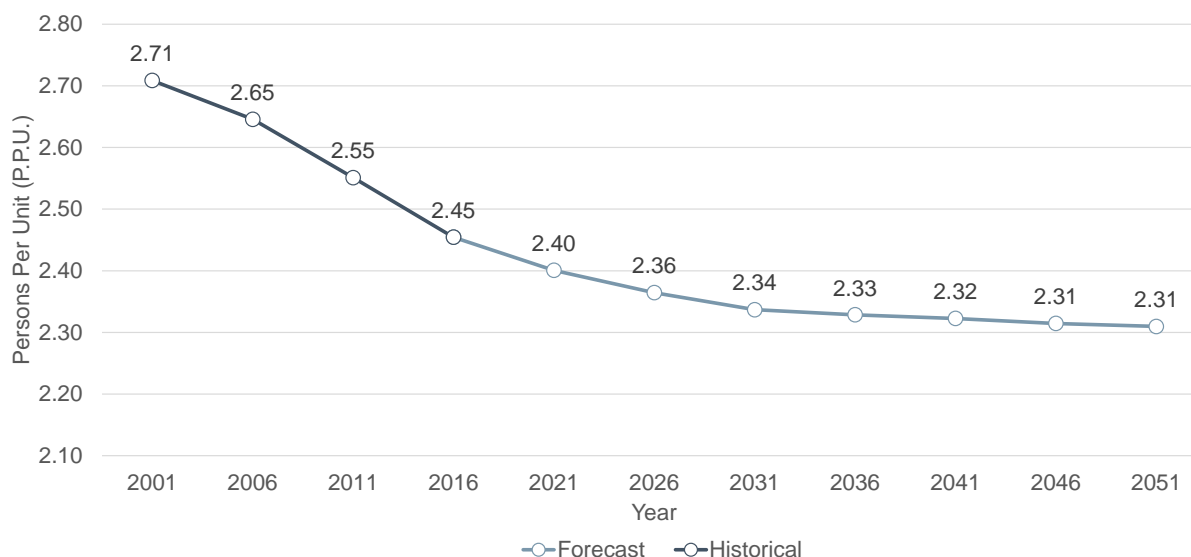
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### **4.6.1 *Persons Per Units***

Figure 4-8 summarizes anticipated long-term trends in average housing occupancy (i.e., P.P.U.) for Northumberland County from 2016 to 2051 within the context of historical trends from 2001 to 2016. As previously discussed, the P.P.U. forecast is based on a headship rate analysis (refer to subsection 3.5.4 and Appendix B). As previously mentioned, P.P.U. levels are anticipated to show some signs of stabilization within Northumberland County in the near term. Recent impacts of COVID-19 on higher housing prices and rents may further support this stabilization trend as young adults defer entering into the housing market. Over the long-term forecast period, however, average household occupancy levels are expected to decline between 2016 and 2051, largely as a result of the aging of the population.



Figure 4-8  
Northumberland County  
Historical and Forecast P.P.U., 2016 to 2051



Note: Population figures include net Census undercount estimated at approximately 2.3%.

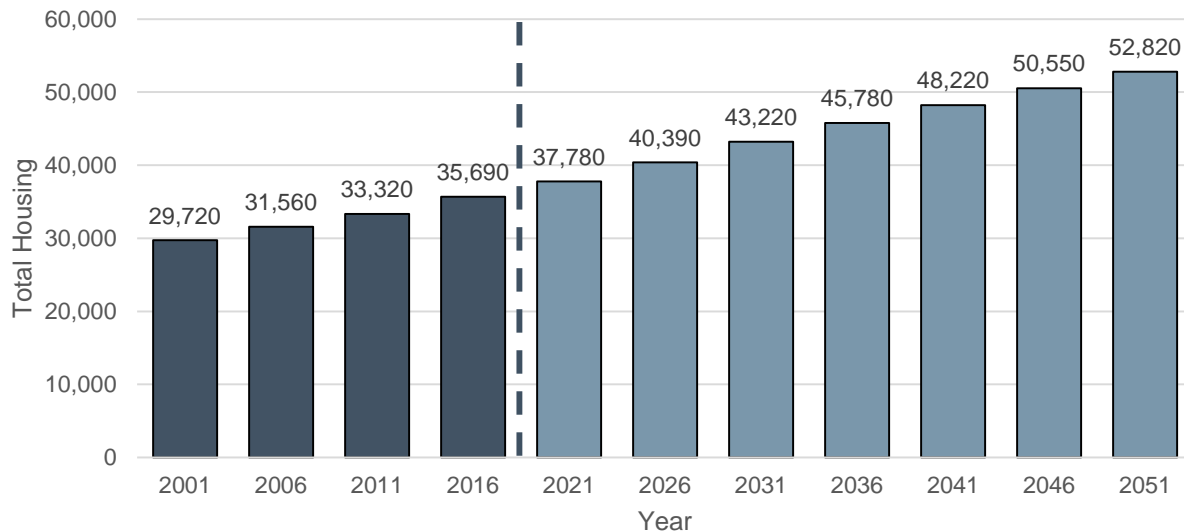
Source: Historical data derived from Statistics Canada Census. Forecast data developed by Watson & Associates Economists Ltd., 2021.

#### 4.6.2 County-Wide Housing Forecast to 2051

Figure 4-9 summarizes the long-term total household forecast for Northumberland County to 2051. As of 2016, the County's housing base was approximately 35,700 units. By 2051, the number of households in the County is anticipated to increase to approximately 52,800 total households. This represents an annual housing growth rate of approximately 1.1% over the 35-year forecast period. This represents a slightly higher rate of forecast housing growth relative to the County's historical 15-year average annual housing growth rate (0.7% from 2001 to 2016). As previously discussed, recent residential building permit activity (new units only) has been relatively strong in recent years, generating an estimated increase of approximately 418 occupied households per year between 2016 and 2021. Over the 2021 to 2051 forecast period, the County is forecast to average approximately 500 new housing units per year, which is approximately 23% higher than the average level of 405 new housing units which was achieved from 2001 to 2021.



Figure 4-9  
Northumberland County  
Household Forecast, 2016 to 2051



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

Source: Historical 2001 to 2016 data derived from Statistics Canada Census. Forecast prepared by Watson & Associates Economists Ltd., 2021.

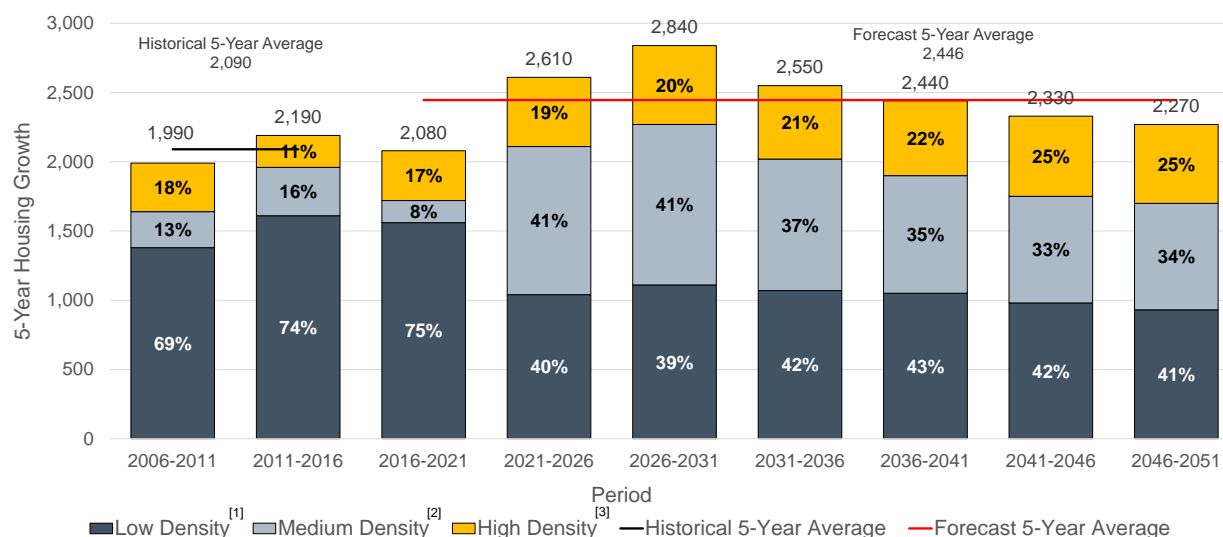
Figure 4-10 summarizes the long-term total annual household forecast for Northumberland County in five-year increments from 2016 to 2051 and by housing structure type. It is anticipated that a majority of housing growth will include low-density (single and semi-detached) housing development at 45% of total households, followed by medium density (townhouses and duplexes) at 33% and high density (apartments) at 21%. Forecast housing demand (propensity) is anticipated to be strongest for low-density housing developments. While there is strong demand for low-density housing forms within the County, increasing demand is also anticipated for medium- and high-density housing forms to provide greater choice in housing options by type and tenure across a diverse mix of residents by age and income.

Addressing the interconnection between the County's competitive economic position and its longer-term housing needs by market segment is critical in realizing the County's future forecast population and employment growth potential, as well as the County's ultimate goals related to prosperity, opportunity, and livability. This approach recognizes that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. To help ensure



that economic growth is not constrained by future labour shortages, effort will be required by Northumberland County and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

**Figure 4-10**  
**Northumberland County**  
**Annual Household Forecast by Housing Type,**  
**Five-Year Growth Increment, 2016 to 2051**



<sup>[1]</sup> Includes single detached and semi-detached units.

<sup>[2]</sup> Includes townhouses and apartments in duplexes.

<sup>[3]</sup> Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, including stacked townhouses.

Source: Historical building permit data from local municipalities within Northumberland County. 2020 is an estimate by Watson & Associates Economists Ltd., 2021.

## 4.7 Observations

It is recognized that future population and employment growth within Northumberland County is strongly correlated with the growth outlook and competitiveness of the economy within Northumberland County and the surrounding area – which in this case is largely represented by the G.T.H.A.



The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. Due to its geographic location within the eastern region of the G.G.H. Outer Ring, Northumberland County is forecast to experience significant outward growth pressure over the next several decades largely from the east and north G.T.H.A. upper-tier municipalities, which are anticipated to be amongst some of the fastest growing municipalities in Ontario.

By 2051, Northumberland's total population base is forecast to grow to approximately 122,000 persons as per Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 17,100 residents between 2016 and 2051, or an average annual population growth rate of approximately 1.0% during this time period. In order to accommodate this population growth, Northumberland County will require approximately 500 new Census households annually over the 2021 to 2051 period.

In accordance with the comprehensive analysis provided through this report, the Growth Plan, 2019 is recommended as the preferred long-term growth scenario for Northumberland County. As such, a higher long-term population forecast for Northumberland County is not supported for the purposes of long-term growth management and urban land needs analysis.

It is important to recognize that while the County's population base is growing, it is also getting older. Between 2016 and 2051, the 75+ age group (older seniors) is forecast to represent the fastest growing population age group, with an average annual population growth rate of 2.8%. With an aging population, the County will be heavily reliant on net migration as a source of population as opposed to natural increase.

With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density forms including seniors' housing and affordable housing options. Northumberland County is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.



## 5. Northumberland County Housing Strategy

Building on the County-wide housing forecast presented in Chapter 4, this chapter summarizes the County-wide housing forecast allocations by local municipality and by planning policy area (i.e., B.U.A., D.G.A., and remaining Rural Areas). For additional information, please refer to Appendix D.

### 5.1 Planning for Housing Intensification

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#### 5.1.1 *Defining Residential Intensification*

The Growth Plan considers any residential development within the delineated B.U.A. as intensification, which contributes towards the intensification target. As previously discussed in Chapter 2, a B.U.A. was delineated for all urban settlements within the G.G.H. by the Province in 2006. The B.U.A. was based on the portion of the urban settlement that was primarily developed as of 2006. The remaining portion of the Urban Settlement Area outside the B.U.A. is referred to as the D.G.A. It is important to note that the delineation of the B.U.A. does not change over time.

As discussed in Chapter 2, the Growth Plan, 2019 intensification target is a minimum and planning for a lower target requires an alternative request to be made to the Province. The intensification target is based on the minimum percentage of all residential development occurring annually within the delineated B.U.A. This target is measured from July 2022 to 2051. The start of the period in mid-2022 represents the required O.P. review completion deadline for all upper-tier and single-tier municipalities in accordance with the Growth Plan, 2019. Currently, Northumberland County is required to target or improve upon the existing intensification target set in the County's existing O.P., which is currently 40%. Based upon recent residential development activity as well as anticipated long-term market demand for residential intensification, a 40% intensification target is not considered achievable for the County, and therefore an alternative intensification target of 17% is recommended.

Intensification can take many forms. The P.P.S., 2020 defines intensification as development of a property, site or area at a higher density than currently exists already. As previously discussed, intensification under the Growth Plan, 2019 builds on the P.P.S., 2020 definition, but also includes all other residential development within the B.U.A. The following are examples of intensification forms:





- Development on vacant sites within the B.U.A.;
- Redevelopment, including the reuse of brownfield sites;
- Additional development on underutilized lots;
- Infill development, development on small vacant sites surrounded by developed parcels;
- Expansion or conversion of existing buildings (e.g., non-residential building converted to residential use); and
- Second Units (or Additional Residential Unit).

### ***5.1.2 Historical Housing Intensification Trends, 2006 to 2019***

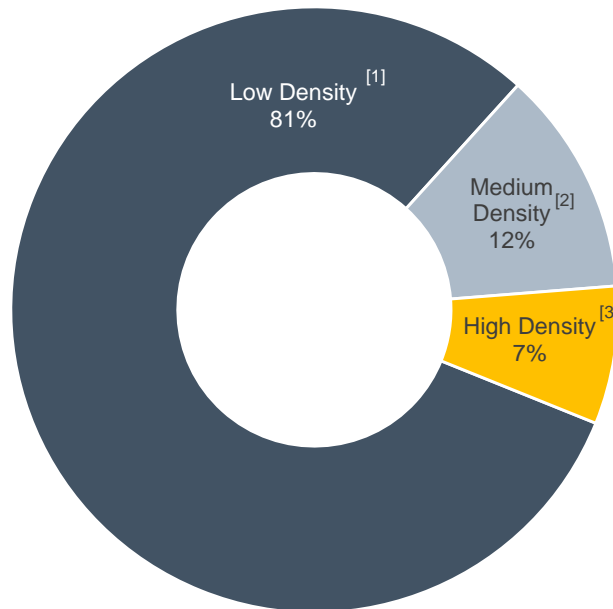
Since 2006, a large portion of housing growth that has occurred within the County's B.U.A. has consisted of at-grade housing (singles, semi-detached and townhouses). This includes the completion of subdivision plans that were built after the delineation of the B.U.A. in 2006. Over the long-term planning horizon, it is anticipated these opportunities will steadily diminish.

Over the 2011 to 2020 period, approximately 31% of the County's urban development occurred within the B.U.A., representing approximately 80 housing units annually. Of all the housing development over the 2011 to 2020 period, however, only 19% of the housing development has occurred in the B.U.A.

As summarized in Figure 5-1, residential housing growth over this most recent five-year period has included a large portion of at-grade housing, approximately 93% of the housing development within the B.U.A. As previously noted, this housing growth primarily consists of the subdivisions which have been completed during this time period. During the past five years, high-density development within the B.U.A. was primarily concentrated in the Municipality of Port Hope.



Figure 5-1  
Northumberland County  
New Housing Unit Activity within the B.U.A., 2016 to 2020



<sup>[1]</sup> Includes single detached and semi-detached units.

<sup>[2]</sup> Includes townhouses and apartments in duplexes.

<sup>[3]</sup> Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Source: Historical building permit data from local municipalities within Northumberland County. Data for 2020 has been estimated by Watson & Associates Economists Ltd., 2021.

## 5.2 Real Estate Market Drivers of Residential Intensification in Northumberland County

As mentioned in Chapter 3, there are three main drivers of high-density housing forms in Northumberland County. First, with an aging population in Northumberland County, some residents may wish to downsize their current housing accommodations and/or relocate from a rural area to a more urban setting. This places demand for additional forms of high-density housing and seniors' housing to be located within proximity to urban amenities. Second, increasing housing prices within the County and the broader market area (refer to Figure 5-2, below) has eroded housing affordability over the past decade and is placing increasing emphasis on smaller, compact homes that are located within urban environments. Third, lifestyle preferences play an important role in the type of housing that is provided and are recognized as a key determinant in residential development location decisions, particularly as lifestyle preferences relate to younger



demographic groups. Mixed-used environments which integrate residential and commercial uses with other community uses and public open spaces represent opportunities to attract younger working-age residents over traditional suburban environments. This underscores the concept of “place making” as an increasingly recognized and important planning approach to creating diverse and vibrant neighbourhoods and workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met.

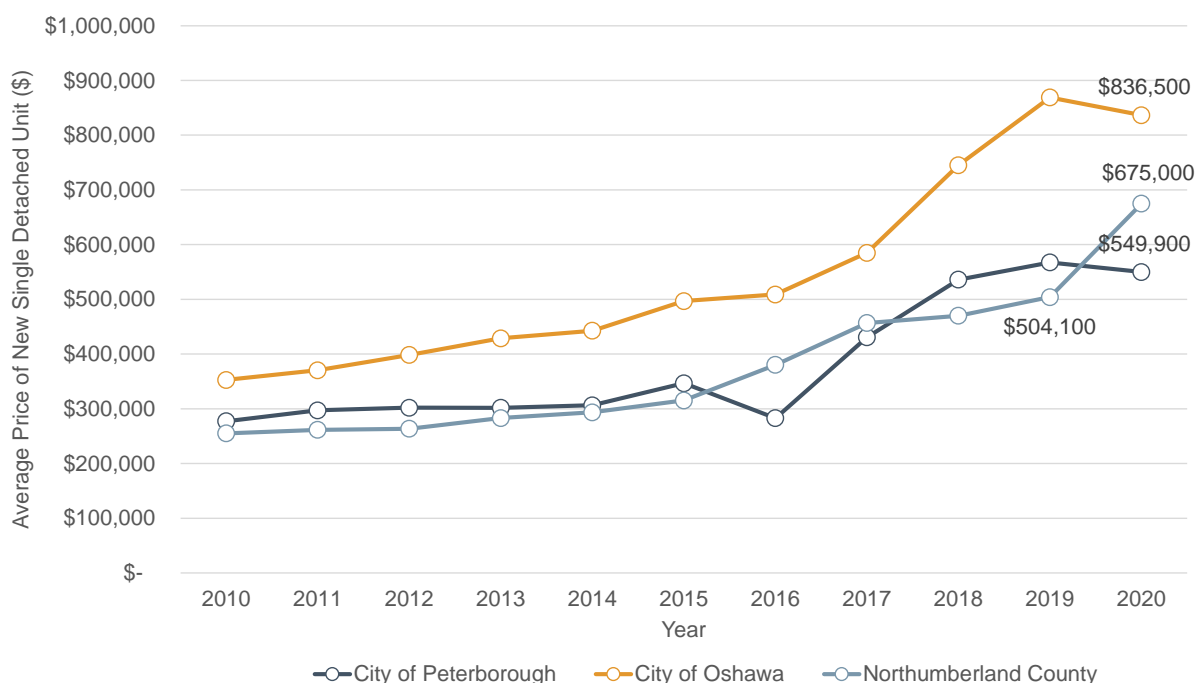
### **5.2.1 Recent Trends in Housing Prices**

Figure 5-2 summarizes historical trends in average housing sale prices for Northumberland County and surrounding G.G.H. municipalities for single detached dwelling units between 2010 and 2020. Housing prices for new single detached units are highest in the City of Oshawa. Historically, housing prices in Northumberland County and the City of Peterborough have remained comparable to one another. In the past year, however, Northumberland County has experienced a significant increase in the average price of a single detached unit, rising 34% from \$504,100 to \$675,000. Since 2010, the average price of a single detached house in Northumberland County has increased by approximately 9% each year.

Average household income growth across Northumberland County has not kept pace with housing price appreciation over the past decade. As a result, housing affordability has steadily declined over the past decade across Northumberland County, driving increased demand for more affordable forms of ownership housing as well as rental housing options.



Figure 5-2  
Greater Golden Horseshoe (G.G.H.)  
Historical Trends in Housing Prices



Source: Data for the City of Peterborough and the City of Oshawa derived from CMHC Housing Market Information Portal – Absorbed Unit Prices summarized by Watson & Associates Economists Ltd. Data for Northumberland County derived from Canadian Real Estate Association (CREA) Northumberland Hills Association of Realtors summarized by Watson & Associates Economists Ltd., 2021.

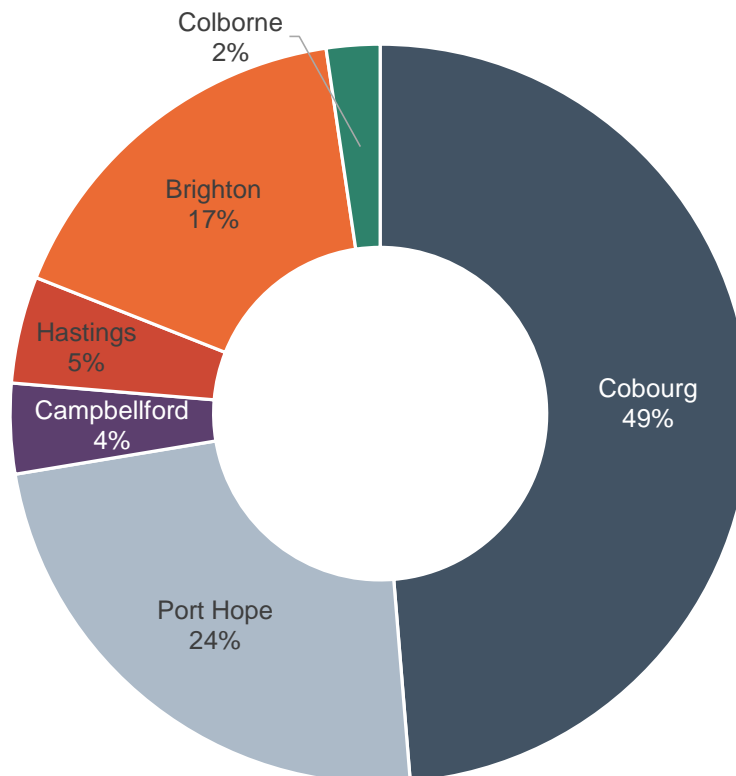
### 5.2.2 Summary of Future Housing Intensification Opportunities and Constraints

Northumberland County has identified a total supply potential of approximately 6,600 units in the B.U.A, including active development applications, infill and redevelopment sites (refer to Appendix C, Table C.8 and Appendix E for additional details). As summarized in Figure 5-3, the majority of the intensification potential for the County is located in the Town of Cobourg, comprising 49% of the County's overall intensification opportunities. The Municipality of Port Hope accounts for 24% of the overall intensification potential; however, the majority of these opportunities are anticipated to be available over the medium- to long-term planning horizon. Similarly, the Municipality of Brighton has identified 1,100 residential intensification units accounting for 17% of the County's overall intensification potential, with most of these opportunities anticipated to be available over the medium- to long-term planning horizon. The remaining three



urban areas (i.e., Campbellford, Hastings, and Colborne) make up the remaining 11% of the County's intensification potential. For additional details about intensification sites by local municipality, please see Appendix E.

Figure 5-3  
Northumberland County  
Share of Residential Intensification Potential within the B.U.A. by Local Municipality



Note: Figures may not add precisely due to rounding.

Source: Intensification potential provided by local municipalities in Northumberland County summarized by Watson & Associates Economists Ltd., 2021.

#### 5.2.2.1 *Intensification Target and Housing Forecast in B.U.A.*

As shown in Figure 5-4, Cobourg and Port Hope provide the greatest opportunity to accommodate a wide range of housing options (low, medium, and high density) within the B.U.A. Market demand for residential intensification is considered to be relatively modest throughout the County's remaining Urban Areas.



Figure 5-4  
Northumberland County  
Residential Housing Forecast by Policy Area, 2022 to 2051

### Housing Units by Policy Area

| Urban Area                  | B.U.A.       | D.G.A.        | Rural        | Total         |
|-----------------------------|--------------|---------------|--------------|---------------|
| Town of Cobourg             | 1,100        | 4,170         | -            | 5,270         |
| Municipality of Port Hope   | 860          | 3,070         | 220          | 4,150         |
| Campbellford                | 120          | 510           | -            | 630           |
| Hastings                    | 100          | 480           | -            | 580           |
| Municipality of Trent Hills | 220          | 1,020         | 130          | 1,370         |
| Municipality of Brighton    | 280          | 1,390         | 150          | 1,820         |
| Colborne                    | 70           | 490           |              | 560           |
| Town of Cramahe             | 70           | 490           | 110          | 670           |
| <b>Total Urban Area</b>     | <b>2,530</b> | <b>10,140</b> | <b>-</b>     | <b>12,670</b> |
| Rural Area                  | 0            | 0             | 1,970        | 1,970         |
| <b>County-Wide</b>          | <b>2,530</b> | <b>10,140</b> | <b>1,970</b> | <b>14,650</b> |

### Share of Housing Units by Policy Area

| Urban Area                  | B.U.A.     | D.G.A.     | Rural      | Total       |
|-----------------------------|------------|------------|------------|-------------|
| Town of Cobourg             | 21%        | 79%        | 0%         | 100%        |
| Municipality of Port Hope   | 21%        | 74%        | 5%         | 100%        |
| Campbellford                | 19%        | 81%        | 0%         | 100%        |
| Hastings                    | 17%        | 83%        | 0%         | 100%        |
| Municipality of Trent Hills | 16%        | 75%        | 9%         | 100%        |
| Municipality of Brighton    | 15%        | 76%        | 9%         | 100%        |
| Colborne                    | 13%        | 88%        | 0%         | 100%        |
| Town of Cramahe             | 10%        | 73%        | 17%        | 100%        |
| <b>Total Urban Area</b>     | <b>20%</b> | <b>80%</b> | <b>0%</b>  | <b>100%</b> |
| Rural Area                  | 0%         | 0%         | 100%       | 0%          |
| <b>County-Wide</b>          | <b>17%</b> | <b>69%</b> | <b>14%</b> | <b>100%</b> |

Note: Totals have been rounded and may not add up precisely. Secondary units are embedded in the above figure.

Source: Watson & Associates Economists Ltd., 2021.



### **5.3 Northumberland County Population and Housing Growth Allocations by Area Municipality and Planning Policy Area**

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Figure 5-5 and Figure 5-6 provide a summary of the population and housing forecast to 2051 by Urban and Rural Area. Further details are provided in Appendix D. While population and employment growth rates vary by geographic area, each of the areas share a number of relatively common attributes with respect to long-term residential development and demographic trends, including:

- All areas are expected to experience housing growth over the long-term forecast period;
- Average annual new housing construction is anticipated to increase from recent levels experienced over the past ten years in Urban Areas;
- Future housing growth will be dominated by low-density housing forms; however, increasing market opportunities will exist for medium-density and high-density housing; and
- P.P.U. levels are forecast to experience a slight decline over the planning horizon. In addition to the aging of the population, a moderate shift from Census families and Census non-families is also anticipated to have a downward influence on projected P.P.U. levels.

As identified above, various factors were considered in allocating population and housing growth by Urban and Rural Area. In addition to the above considerations, a number of assumptions were made with respect to the residential growth potential of each area, based on discussions with County and local municipal staff.

Key observations regarding the housing and population growth allocations by Urban and Rural Area are provided below. As previously mentioned, further details on the population and housing by Urban and Rural Area are provided in Appendix D, which includes details on the housing by structure type, existing population and housing base and forecast to 2051.





Figure 5-5  
Northumberland County  
Population Forecast by Urban and Rural Areas

| Area                       | 2016   | 2051    | 2016 to 2051 |
|----------------------------|--------|---------|--------------|
| Cobourg                    | 19,900 | 32,100  | 12,200       |
| Port Hope                  | 13,000 | 21,200  | 8,200        |
| Campbellford               | 3,550  | 5,060   | 1,510        |
| Hastings                   | 1,140  | 2,560   | 1,420        |
| Brighton                   | 6,800  | 11,200  | 4,400        |
| Colborne                   | 2,300  | 3,700   | 1,400        |
| Urban Areas                | 46,700 | 75,820  | 29,120       |
| Rural Areas <sup>[1]</sup> | 40,900 | 46,180  | 5,280        |
| Northumberland County      | 87,600 | 122,000 | 34,400       |

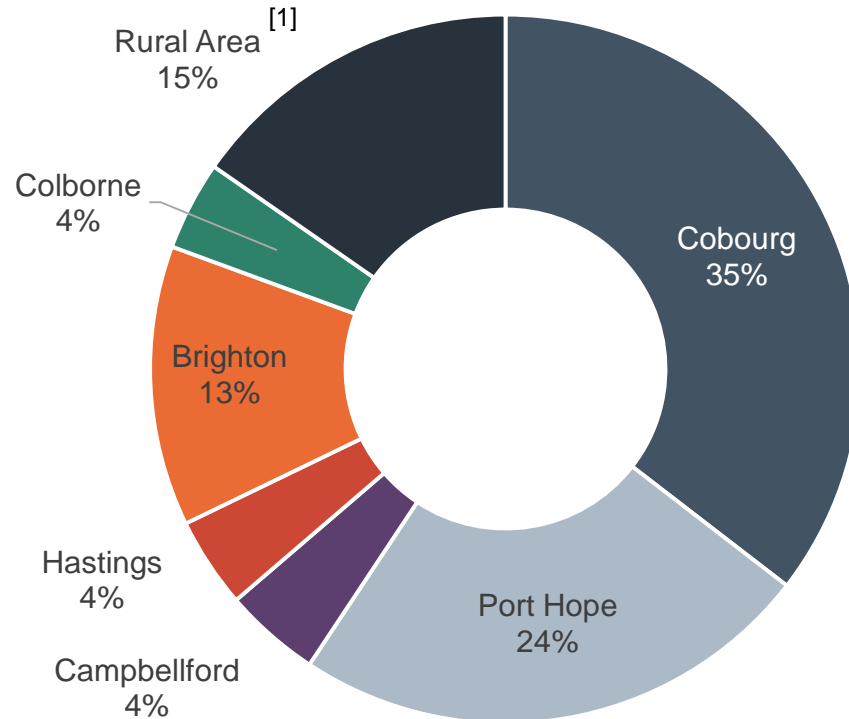
<sup>[1]</sup> Includes Rural Settlement Areas, Hamlets and Other Rural.

Note: Figures may not add precisely due to rounding. Population figures include net Census undercount.

Source: Watson & Associates Economists Ltd., 2021.



Figure 5-6  
Northumberland County  
Population Growth Allocation, 2016 to 2051 by Urban and Rural Area



[1] Includes Rural Settlement Areas, Hamlets and Other Rural.

Note: Figures may not add precisely due to rounding. Population figures include net Census undercount.

Source: Watson & Associates Economists Ltd., 2021.

### ***Population and Housing Allocations by Area Municipality***

Figure 5-7 provides a summary of the population of each area municipality from 2016 to 2051, and Figure 5-8 summarizes the share of population growth by area municipality. Further details are provided in Appendix D. Key observations include:

- All area municipalities are expected to experience growth over the long-term forecast. Some municipalities, however, are expected to grow faster than others;
- A little over a third of the County's population growth is allocated to the Town of Cobourg. This municipality is expected to grow at an average annual rate of 1.4% per year, or approximately 350 people per year over the forecast;



- After the Town of Cobourg, the Municipality of Port Hope is expected to experience the second most growth in the County, growing at an average annual rate of 1.2%, or approximately 250 people per year;
- The Municipality of Brighton is expected to add an additional 4,800 people over the forecast period, with an average annual growth rate of 1.0%;
- The Municipality of Trent Hills is expected to grow moderately over the forecast at an average annual rate of 0.7% per year, or approximately 100 people per year, and the Township of Hamilton is forecast to grow by 2,000 people, or approximately 60 people per year; and
- Both the Township of Cramahe and the Township of Alnwick/Haldimand are expected to accommodate a population increase of 1,700, respectively, over the forecast.

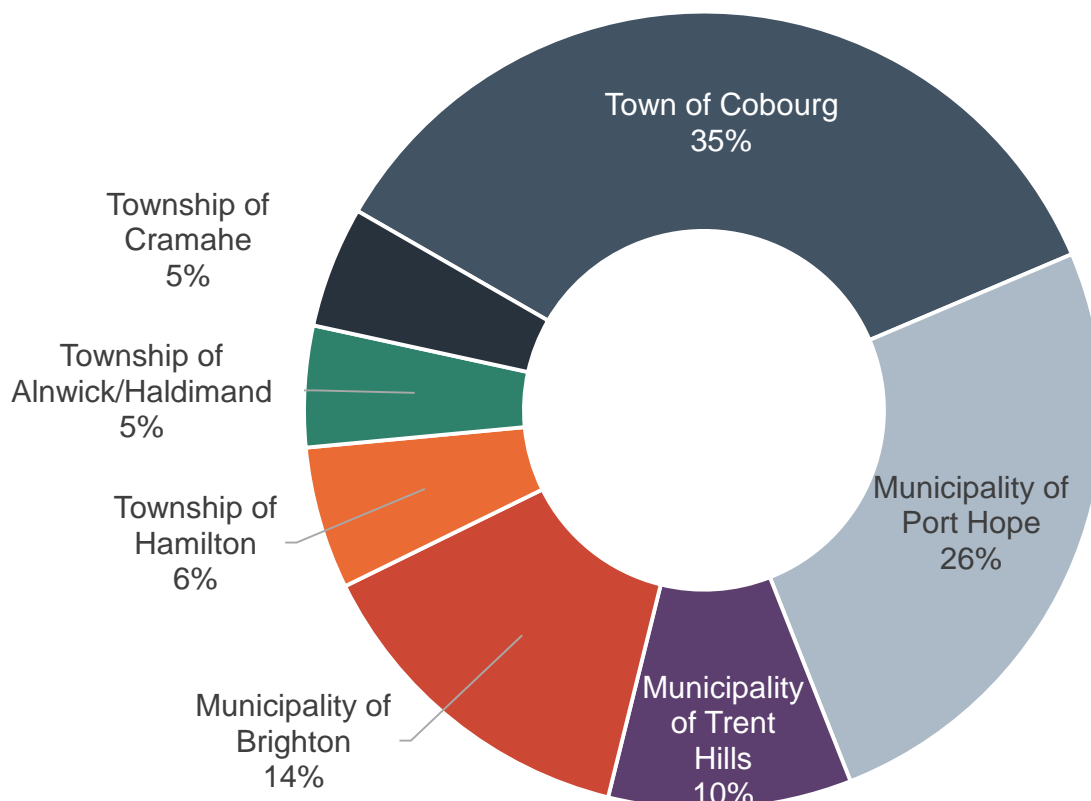
Figure 5-7  
Northumberland County  
Population Growth Allocation, 2016 to 2051

| Municipality                  | 2016   | 2051    | 2016 to 2051 |
|-------------------------------|--------|---------|--------------|
| Town of Cobourg               | 19,900 | 32,100  | 12,200       |
| Municipality of Port Hope     | 17,100 | 25,900  | 8,800        |
| Municipality of Trent Hills   | 13,200 | 16,600  | 3,400        |
| Municipality of Brighton      | 12,100 | 16,900  | 4,800        |
| Township of Hamilton          | 11,200 | 13,200  | 2,000        |
| Township of Alnwick/Haldimand | 7,000  | 8,700   | 1,700        |
| Township of Cramahe           | 6,500  | 8,200   | 1,700        |
| Alderville First Nations      | 500    | 500     | -            |
| Northumberland County         | 87,600 | 122,000 | 34,400       |

Note: Figures may not add precisely due to rounding. Population figures include net Census undercount.  
Source: Watson & Associates Economists Ltd., 2021.



Figure 5-8  
Northumberland County  
Population Growth Allocation, 2016 to 2051



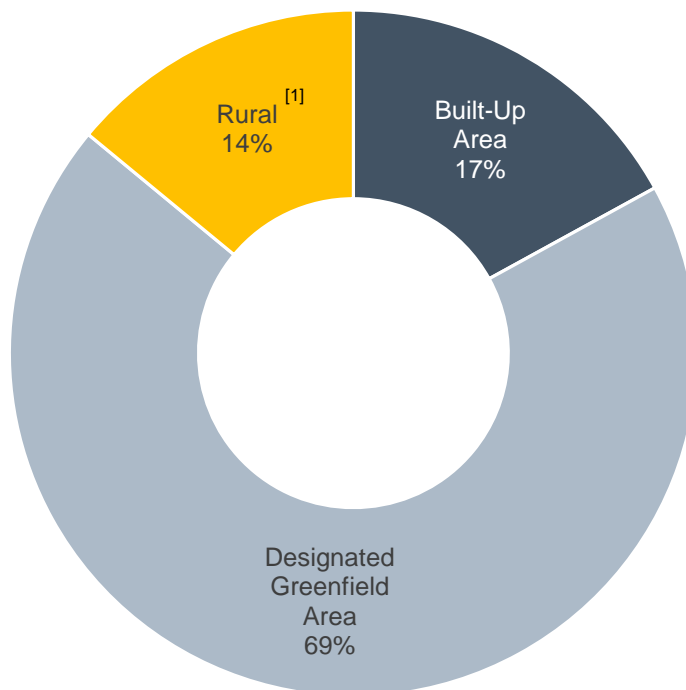
Note: Figures may not add precisely due to rounding. Population figures include net Census undercount.  
Source: Watson & Associates Economists Ltd., 2021.

### 5.3.1 Population and Housing Forecast by Planning Policy Area

As previously discussed, most of the County's population and housing growth is directed to Urban Settlement Areas with full municipal servicing. As summarized in Figure 5-9, 86% of population growth is anticipated to be accommodated within the County's Urban System from 2022 to 2051, of which 69% is in the D.G.A. and 17% in the B.U.A. The remaining 14% of population growth is to be accommodated within the County's Rural System.



Figure 5-9  
Northumberland County  
Population Growth by Policy Area (B.U.A./D.G.A.), 2022 to 2051



<sup>[1]</sup> Includes Rural Settlement Areas, Hamlets and Other Rural.

Note: Figures may not add precisely due to rounding. Population figures include net Census undercount.

Source: Watson & Associates Economists Ltd., 2021.

### 5.3.2 Hamlets and Remaining Rural Areas

It is also recognized that the County's Hamlets and remaining Rural Areas also have a role to play in accommodating future development subject to available land supply, supporting infrastructure and scale of development. The County's Hamlet Areas represent service centres to the surrounding Rural Area and provide clusters of business operations that are essential to the County's future economic growth. As such, infilling and minor rounding out of existing development within Hamlet Areas is important to ensure that these areas remain vibrant, sustainable and complete communities. While provincial, County and local planning policies direct development to fully serviced Urban Areas, it is important to note that 13% of the County's housing



growth, representing approximately 2,000 permanent housing units, has been allocated to the County's Rural System.<sup>[64]</sup>

## 5.4 Observations

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Over the forecast horizon, it is anticipated that the County's Urban and Rural Systems will both continue to experience population growth. Much of the growth is concentrated in the Town of Cobourg and the Municipality of Port Hope, accounting for 61% of the County's overall population growth over the long-term planning horizon.

Over the forecast horizon, it is anticipated that the majority of the County's growth will be concentrated in Urban Areas. Between 2022 and 2051, approximately 86% of the anticipated population growth is concentrated in Urban Areas. The remaining 14% of population growth has been allocated to the County's Hamlets and remaining Rural Areas. Over the long-term planning horizon, the Urban Settlement Areas will play an increasing role in broadening future housing options available within the County with respect to housing by structure type. Chapter 7 explores the urban land requirements to accommodate future urban growth within the existing settlement boundaries of the Urban Settlement Areas.

It is recommended that the County target a lower intensification rate of 17% of housing growth within the B.U.A. The current Northumberland O.P. housing intensification target of 40% is not considered to be realistic based on historical development trends, available near-term and long-term housing supply opportunities, and anticipated demand for housing within the B.U.A. across the County. Cobourg and Port Hope provide the greatest opportunity to accommodate a wide range of housing options (low, medium, and high density) within the B.U.A. Market demand for residential intensification is considered to be relatively modest throughout the County's remaining Urban Areas.

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<sup>[64]</sup> As measured between 2022 and 2051.



## 6. Northumberland County Long-Term Employment Land Needs Assessment

### 6.1 Introduction

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Building on the findings of Chapters 3 and 4, this chapter provides an analysis of forecast employment growth trends for Northumberland County to the year 2051, based on recent Statistics Canada data as well as other available information sources. This analysis has been prepared to provide insight with respect to the County's long-term Employment Area Land Needs to the year 2051.

#### 6.1.1 *Provincial L.N.A. Methodology*

In accordance with the provincial L.N.A. methodology, urban land needs are to be assessed across two different areas within the urban system including **Community Areas** and **Employment Areas**. It is important to recognize that the provincial L.N.A. methodology focuses on the Urban System, where there are settlement areas with municipal servicing and urban amenities that support the growth management policies of the Growth Plan, 2019.

Provided below is a summary of the two areas that are reviewed for land requirements.

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

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

This chapter assesses the County's Urban Employment Area land needs for Cobourg, Port Hope, Brighton, Campbellford, Hastings and Colborne. Consideration is also given to forecast rural employment growth outside the County's Urban Settlement Areas





within Rural Employment Areas as well as on remaining rural lands. Chapter 7 provides an assessment of the County's Community Area Land Needs to the year 2051.

### **6.1.2 *Employment Land-Use Categories***

The long-term employment forecast prepared herein includes a breakdown of employment by land-use category, including population related employment (P.R.E.), urban employment lands employment (E.L.E.), rural E.L.E. and other rural employment. These employment categories, as defined by the Province, are generally based on built-form and land-use characteristics. The majority of the County's industrial sector employment which is accommodated in industrial-type buildings is referred to as E.L.E. The County's commercial and institutional sector employment is generally accommodated in commercial and institutional-type buildings, referred to as P.R.E. Given the importance and relative magnitude of E.L.E. within the County's rural areas, this report further breaks down E.L.E., as urban E.L.E. and rural E.L.E. The following is a summary of the employment categories in accordance with the provincial L.N.A.

#### **6.1.2.1 *Urban Population-Related Employment (P.R.E.)***

Urban P.R.E. includes employment in institutional and commercial sectors not accommodated within industrial-type buildings (E.L.E.). Commercial and institutional sector employment in industrial-type buildings (e.g., retail tenant in a multi-tenant industrial building) represents a small share of the County's E.L.E. Work at home employment is also captured as P.R.E. within Northumberland County. Urban P.R.E. is located within the County's Urban Areas and is largely accommodated in downtown cores, commercial nodes and corridors along arterial roads, neighbourhood plazas, schools, and standalone institutional and retail buildings.

#### **6.1.2.2 *Urban Employment Lands Employment (E.L.E.)***

Urban E.L.E. represents jobs accommodated in industrial-type buildings within Urban Areas. This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities as well as a limited amount of employment associated with office commercial and employment-supportive uses. E.L.E. includes a very small portion of employment in the commercial and institutional sectors.



### *6.1.2.3 Rural Employment Lands Employment (E.L.E.)*

Rural E.L.E. represents jobs accommodated in industrial-type buildings outside Urban Areas (Growth Centres). This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities as well as a limited amount of employment associated with office commercial and employment-supportive uses. Rural E.L.E. is predominantly comprised of industrial sector employment, with a small portion of commercial and institutional employment accommodated in rural industrial-type buildings.

### *6.1.2.4 Other Rural Employment*

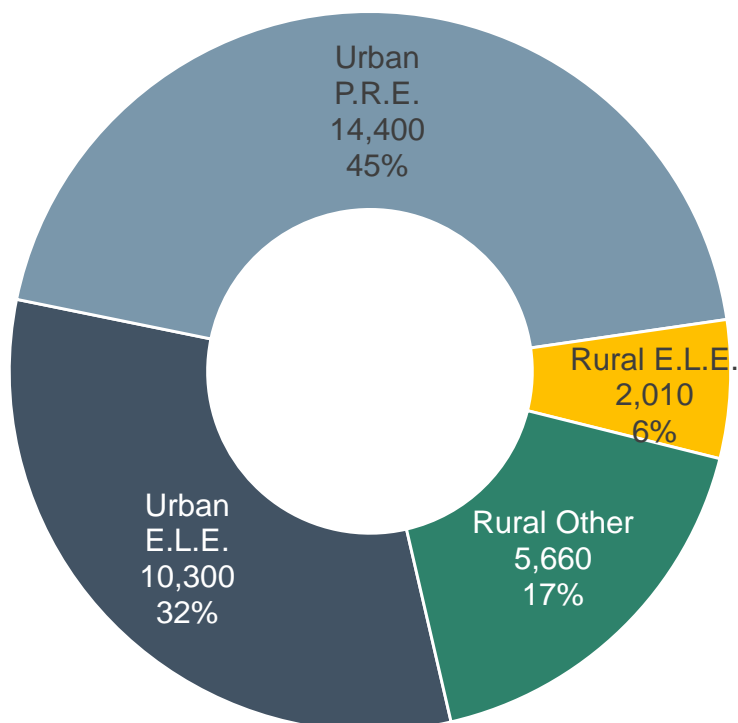
Other rural employment includes employment within the Rural System that is not E.L.E., such as employment in agriculture, resource development, work at home, recreation/tourism and P.R.E.

### *6.1.2.5 Summary of Employment by Category, 2021*

The County's employment base is estimated at 32,370 jobs as of 2021. Figure 6-1 provides a breakdown by the employment categories previously discussed. As summarized in Figure 6-1, urban P.R.E. accommodates the largest share of employment at 45%, followed by urban E.L.E. at 32%, rural E.L.E. at 17% and other rural at 6%.



Figure 6-1  
Northumberland County  
Employment by Land Use Category, 2021



Note: Figures have been rounded and may not add precisely.  
Source: Watson & Associates Economists Ltd., 2021.

## 6.2 Long-Term Employment Growth Outlook to 2051

In accordance with Schedule 3 of the Growth Plan, 2019, Northumberland County's employment base is forecast to reach 44,000 jobs by 2051. Based on the County's current employment base of 32,370 jobs as of 2021 and the Growth Plan, 2019 forecast of 44,000 jobs by 2051, Northumberland County is forecast to add approximately 11,600 jobs, which represents an annual growth rate of approximately 1.0%.

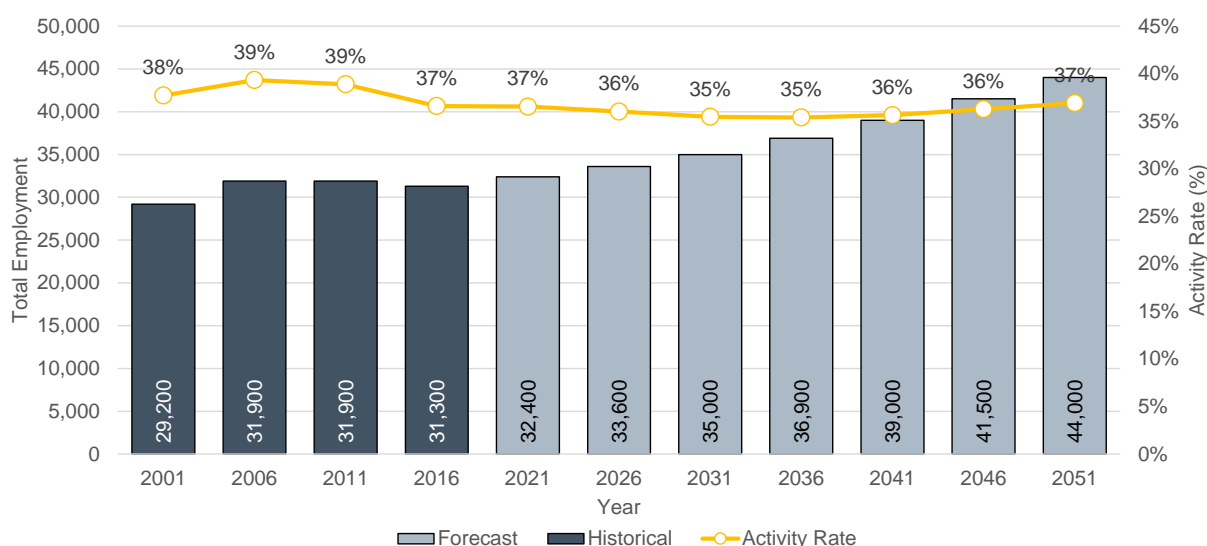
Figure 6-2 summarizes the long-term employment forecast for Northumberland County by total employment and employment activity rate (ratio of jobs to population) in comparison to recent historical trends. The County's employment activity rate has decreased slightly since 2001. Over the long term, the County's employment activity rate is anticipated to remain relatively stable from approximately 37% in 2016 to falling



to 35% by 2031 and then increasing back to 37% by 2051. This moderate increase is anticipated to be largely driven by opportunities within the County's export-based employment sectors (e.g., transportation, wholesale trade, construction, small-scale to mid-sized manufacturing, and agri-business). Employment growth is also anticipated within P.R.E. sectors such as retail, accommodation and food, professional, scientific and technical scientific services, and health care. Growth within these P.R.E. sectors is anticipated to be largely driven by population growth within the County's Urban Areas.

A large percentage of forecast job growth is anticipated to be accommodated through home occupations, home-based businesses and off-site employment, accounting for approximately 28% of employment growth over the 2021 to 2051 period. Work at home and off-site employment does not generate demand for urban Employment Area lands.

Figure 6-2  
Northumberland County  
Employment Forecast 2051



Note: Figures have been rounded. Employment includes work at home and no fixed place of work (N.F.P.O.W.). Population used to calculate activity rate excludes net Census undercount.

Source: Historical 2001 to 2016 data from Statistics Canada Place of Work data. Forecast prepared by Watson & Associates Economists Ltd., 2021.



## 6.3 Employment Forecast by Employment Category

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The following provides a summary with respect to the long-term employment outlook by employment category for the County from 2016 to 2051.

### 6.3.1 *Population-Related Employment*

Urban P.R.E., as previously discussed, includes employment in institutional and commercial sectors within the Urban Areas including retail, personal services, accommodation and food, health and social services, education, and other services.

- Urban P.R.E. growth over the 2016 to 2051 period is expected to account for just over 160 employees annually, representing approximately 45% of overall employment growth in the County.
- As previously discussed in Chapter 3, e-commerce is anticipated to reduce the need for “bricks and mortar” retail over the long-term horizon. Despite this trend, it is important to recognize that the current commercial structure in the County’s Urban Areas is primarily oriented towards local-serving P.R.E. uses (uses that serve the immediate needs of residents), which are not as susceptible to e-commerce. P.R.E. uses related to work at home employment, tourism services, commercial services, local retail serving (e.g., grocery stores and pharmacy) and institutional uses (e.g., medical/health care) are anticipated to comprise the bulk of the P.R.E. growth over the next 30 years.

### 6.3.2 *Urban Employment Lands Employment.*

As previously discussed, Urban E.L.E. represents jobs accommodated in industrial-type buildings on lands designated as Industrial in Urban Areas. This largely includes industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities, as well as a limited amount of employment associated with commercial- and employment-supportive uses.

- As previously identified, the County has a diverse industrial base.<sup>[65]</sup> Over the past five years, the County has experienced employment growth in manufacturing, logistics/warehousing and construction sectors.

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<sup>[65]</sup> Based on O.M.A.F.R.A. EMSI Analyst data.



- Looking forward over the next 30 years, the County is anticipated to continue to accommodate steady Urban E.L.E. growth comprised of a diverse range of industrial sectors. It is anticipated that Urban E.L.E. will account for approximately 40% the County's employment growth, or approximately 140 employees annually.

### **6.3.3 Rural Employment Lands Employment**

Rural E.L.E., as previously discussed, consists of employment in industrial-type buildings within Rural Areas. Rural E.L.E. includes dry industrial uses, uses that require no or partial municipal services (water and wastewater servicing).

- Rural E.L.E. represents a small portion (7%) of the County's employment base.
- Over the forecast horizon, growth in Rural E.L.E. is anticipated to include industrial employment in construction, select commercial uses (such as automotive/truck repair) and warehousing, which typically do not require municipal water services or urban amenities.
- It is anticipated that Rural E.L.E. will accommodate approximately 6% of the County's employment growth, or approximately 20 employees annually. Rural E.L.E. growth is anticipated to be largely accommodated through the expansion of existing industrial operations.

### **6.3.4 Other Rural Employment**

Other Rural Employment, as previously discussed, consists of employment within the Rural Areas that is not located in a Rural Employment Area. Key trends in the County's remaining rural employment base are as follows:

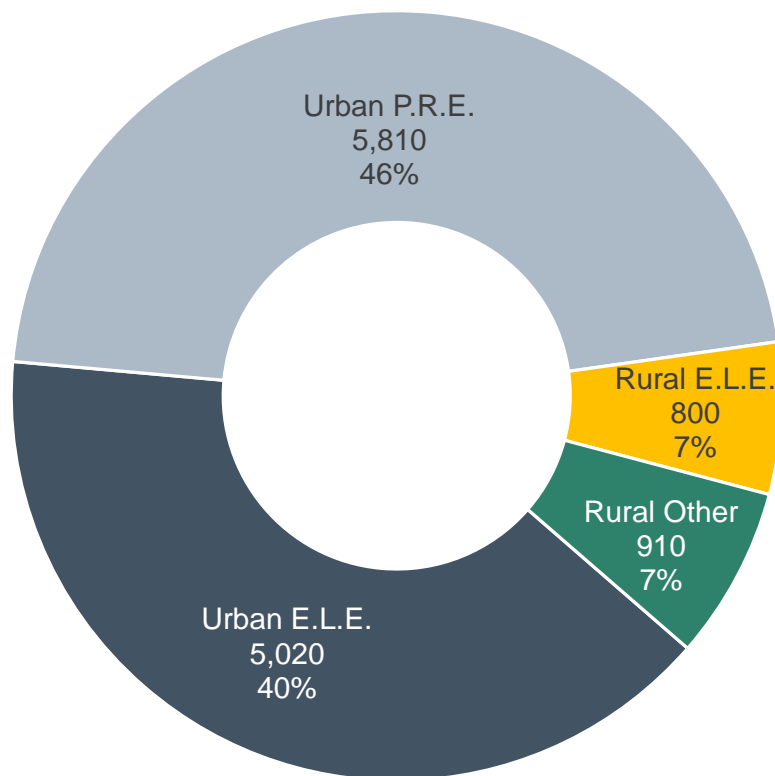
- This category of employment represents 18% of the County's employment base.
- The primary sector, which includes agriculture and aggregates industries, has been a major driver of rural employment growth. Commercial and institutional uses in the Rural Areas and Hamlets are also a component of this category.
- Over the forecast horizon, it is anticipated that rural employment will continue to grow in rural-based sectors (primary sectors), as well as uses related to recreation and tourism.
- Value-added on-farm diversified uses are anticipated to be a key growing component of the County's rural work at home and off-site employment base.



- Technological innovation and improved broadband regional telecommunications will provide more opportunities for rural residents to work from home.
- It is anticipated that Other Rural Employment will accommodate approximately 7% of the County's employment growth, or approximately 25 employees annually.

Figure 6-3 and Figure 6-4 summarize the County's 2051 employment forecast by employment category (P.R.E., Urban E.L.E., Rural E.L.E. and Other Rural).

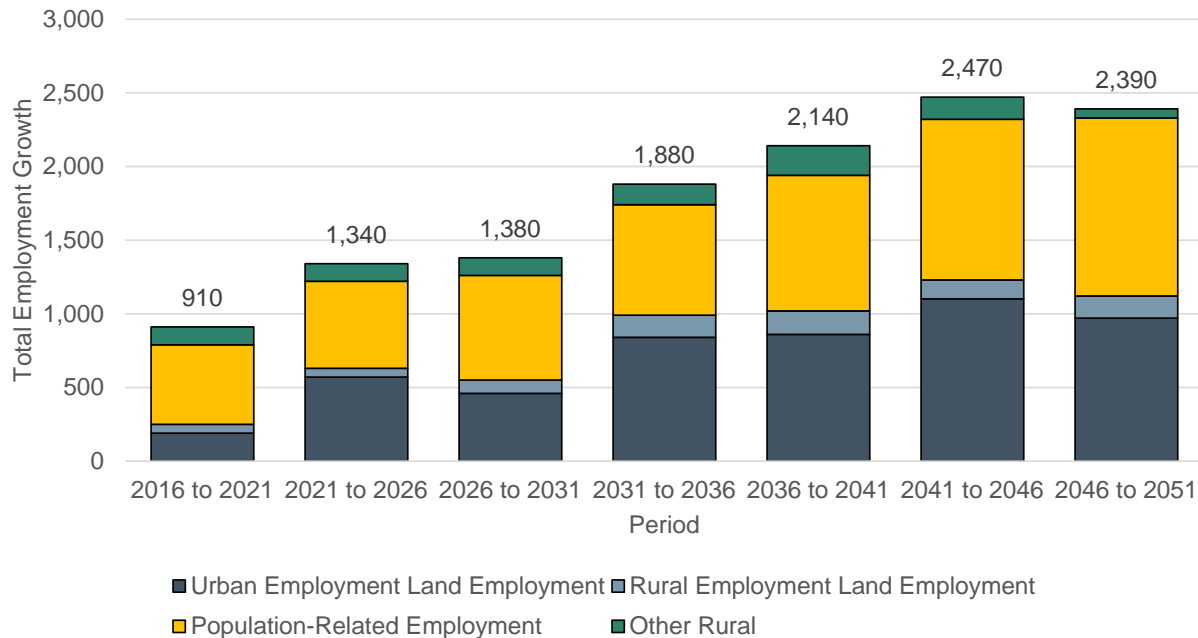
Figure 6-3  
Northumberland County  
Employment Forecast by Employment Category,  
2016 to 2051



Note: Figures have been rounded and may not add precisely.  
Source: Watson & Associates Economists Ltd., 2021.



Figure 6-4  
Northumberland County  
Employment Forecast by Employment Category, 2016 to 2051



Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd., 2021.

## 6.4 Employment Forecast by Area Municipality

Figure 6-5 summarizes the employment forecast to 2051 by area municipality (refer to Appendix F for further details). The County's employment allocations have been determined based on a review of local supply and demand considerations (i.e., existing employment, local population growth, local infrastructure and amenities, market attributes of designated and future Employment Areas). Discussions were also held with County and local municipal planning staff regarding future active non-residential development applications and future employment prospects. While employment growth rates by category vary across the Urban Areas, the following County-wide employment trends by geographic area and land-use category are as follows:

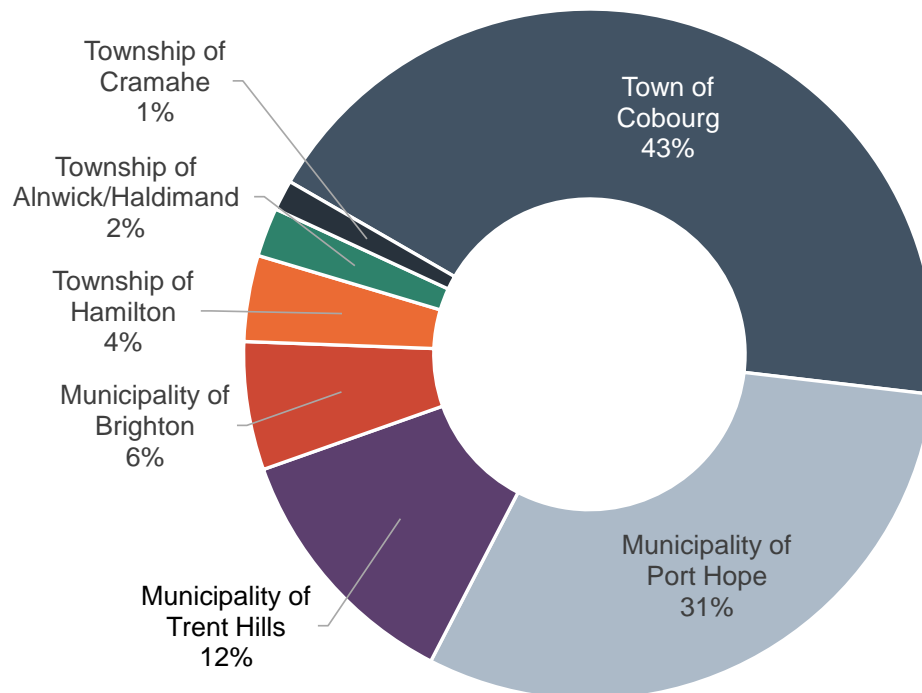
- Urban Area employment growth is expected to account for 79% of the County's total employment at 2051;
- The share of Rural Area employment is forecast to decrease from 24% in 2016 to 21% in 2051; and





- The County's employment base by sector is anticipated to diversify over the long term, driven by steady employment growth in both established and emerging employment clusters as previous discussed in Chapter 3.

Figure 6-5  
Northumberland County  
Employment Growth Allocation by Local Municipality,  
2016 to 2051



Note: Figures are rounded and may not add precisely.  
Source: Watson & Associates Economists Ltd., 2021.

## 6.5 Profile of Northumberland County Employment Areas

### 6.5.1 Designated Employment Areas

In generating the County Employment Area land inventory, all parcels designated as “Industrial” or “Employment” in each local municipal O.P. were reviewed. This Employment Area supply assessment was carried out in accordance with the provincial L.N.A. The analysis was completed primarily through a desktop review using geographic information systems (G.I.S.) mapping software, and the review and assistance of County and local municipal staff. Spatial overlays utilized to develop the



land supply inventory included parcel fabric, land-use layers (including the Northumberland County O.P. designation layers), non-residential building permit data, hydrology/wetlands and orthophotos. A third-party data source, InfoCanada Business Directory, was also utilized to estimate employment and employment density on developed sites.

It is important to note that the County's Employment Area land supply includes both parcel data as well as internal infrastructure such as local roads and stormwater ponds. The Employment Area land supply excludes environmental features (Natural Heritage System), highways, utilities corridors and cemeteries. Employment Area lands are considered developed if a building permit has been issued as of January 1, 2021 and the land is anticipated to be occupied with employment by mid-2021.

As part of the analysis, the Consultant Team with assistance from Northumberland County and local municipal staff identified sites that would likely remain undeveloped by 2051 due to site constraints (e.g., parcels with no existing/planned roads). Sites where environmental and/or topography features may reduce marketability were also discounted from the inventory. In total, approximately 26 ha of designated Employment Area land has been removed from the County's Employment Area land supply inventory due to potential long-term constraints to development.

In accordance with the provincial L.N.A., the Urban Employment Area land inventory and land needs analysis includes only those designated Employment Areas within the County's six Urban Areas Employment Areas (Cobourg, Port Hope, Campbellford, Hastings, Brighton, and Cramahe). Rural Employment Area land needs have not been specifically identified as part of the County's M.C.R.<sup>[66]</sup>

As summarized in Figure 6-6, the County has approximately 784 ha of designated Employment Area land (occupied/vacant). The majority of the County's employment land supply is in Cobourg, Brighton, and Port Hope accounting for approximately 80% of the County's overall inventory. The remaining 20% of the County's Employment Area

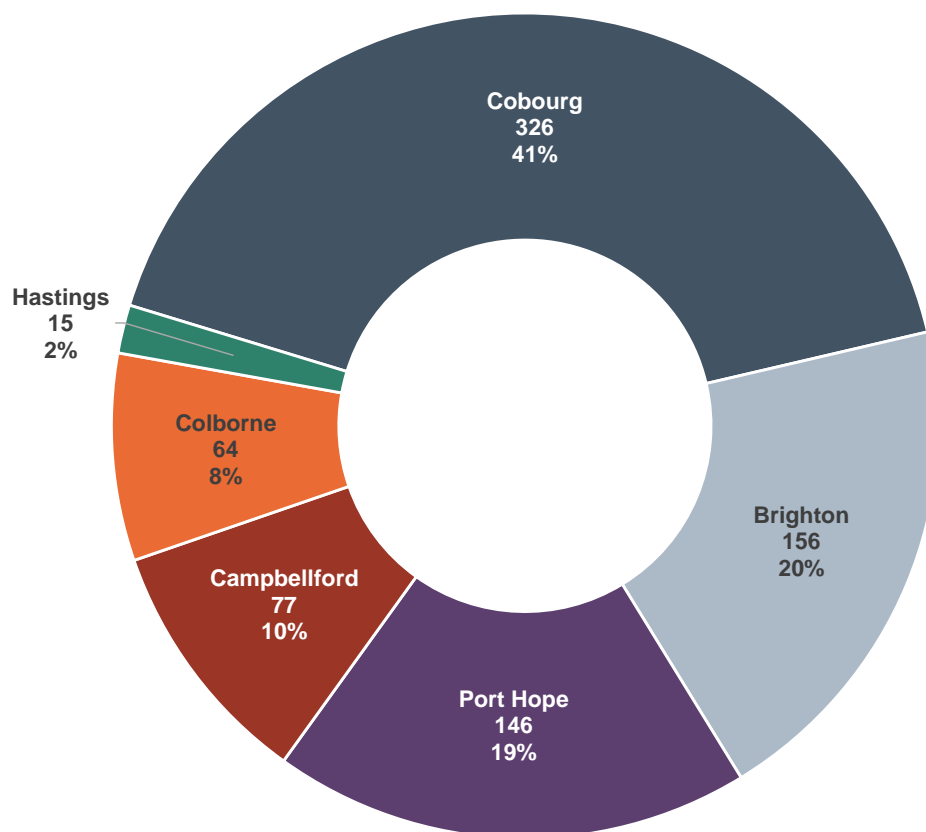
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<sup>[66]</sup> Subsection 2.2.9.5 of the Growth Plan, 2019 states: "Existing employment areas outside of settlement areas on rural lands that were designated for employment uses in an official plan that was approved and in effect as of June 16, 2006, may continue to be permitted. Expansions to these existing employment areas may be permitted only if necessary to support the immediate needs of existing businesses and if compatible with the surrounding uses."



lands are found in Campbellford, Colborne and Hastings. As summarized in Figure 6-7, Northumberland County has approximately 810 ha of designated Employment Area lands, of which approximately 55% of the land inventory is occupied/developed, while the remaining 45% is vacant. Urban Employment Area land supply mapping is provided in Appendix I.

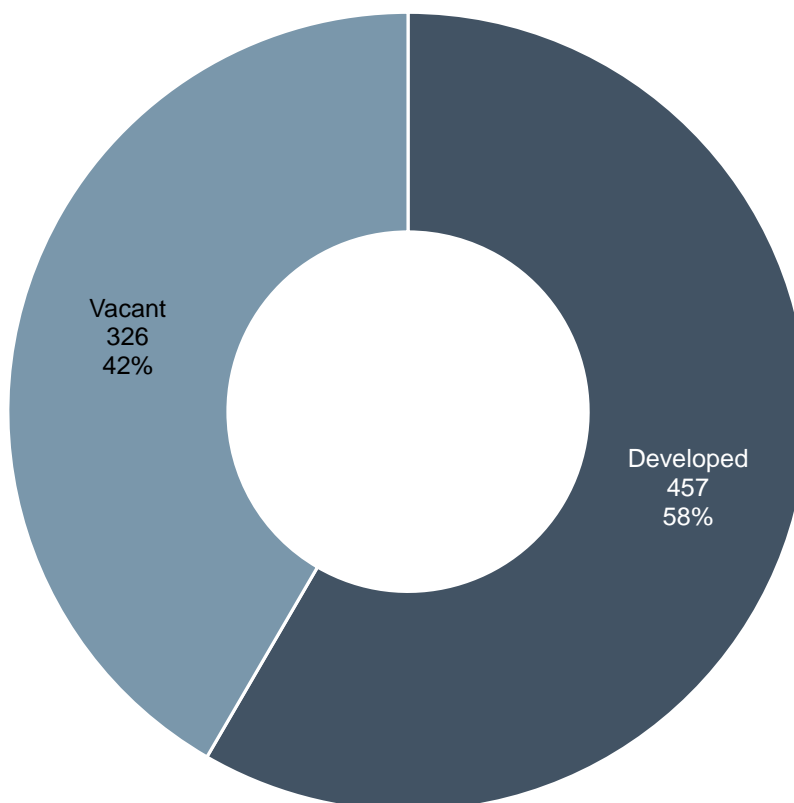
Figure 6-6  
Northumberland County  
Designated Employment Areas  
Land Supply by Area Municipality (Hectares), 2021



Note: Figures are rounded and may not add precisely.  
Source: Watson & Associates Economists Ltd., 2021.



Figure 6-7  
Northumberland County  
Designated Employment Areas  
Land Supply by Supply Status (Hectares), 2021



Note: Numbers may not add precisely due to rounding.  
Source: Watson & Associates Economists Ltd., 2021.

### 6.5.2 *Occupied Employment Areas*

As summarized in Figure 6-8, the existing employment density in the County's Employment Areas ranges from 10 jobs per gross ha in the Colborne Employment Area to 24 jobs per gross ha in the Cobourg and Brighton Employment Areas.



Figure 6-8  
Northumberland County  
Urban Employment Area Employment Density (jobs/gross ha)

| Employment Areas             | 2021<br>Developed<br>(gross ha) | 2021<br>Employment<br>Estimates | Employment<br>Density<br>(jobs/gross ha) |
|------------------------------|---------------------------------|---------------------------------|--|
| Cobourg Employment Area      | 205                             | 4,910                           | 24                                       |
| Port Hope Employment Area    | 101                             | 2,230                           | 22                                       |
| Campbellford Employment Area | 53                              | 760                             | 14                                       |
| Hastings Employment Area     | 8                               | 130                             | 17                                       |
| Brighton Employment Area     | 83                              | 1,430                           | 24                                       |
| Colborne Employment Area     | 8                               | 80                              | 10                                       |
| Urban Employment Areas       | 457                             | 9,530                           | 21                                       |

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

Source: Watson & Associates Economists Ltd., 2021.

Provided below is a summary of existing industrial/business parks located in Northumberland County.

### Town of Cobourg

There are several industrial parks in the Town of Cobourg. The largest industrial park is the Northam Industrial Park generally located in the centre of the Town. This industrial park is home to medium- to large-scale industrial manufacturers ranging from electrical wire, fuel processing, food manufacturing, industrial equipment, and plastics. The second largest industrial area in Cobourg is located in the southeast area of the Town. Major employers in this area include Belden (telecommunications equipment provider), Insulflex (heat resistant manufacturer), Arclin (laminated and surface covering manufacturer for building and automotive industries), and Sabic (thermal plastic resin manufacturer). The other industrial areas are smaller in size and primarily built out.



## **Port Hope**

Port Hope's Urban Area has four Employment Areas. The largest industrial area is located in the Municipality's southeast end and includes the following major employers: Cameco (mineral refining), Standard Auto Wreckers Port Hope (auto parts store), MTW Heating and Cooling (HVAC supplier) and UniTrak (bulk material conveyor). The second largest industrial area in Port Hope is located south of Highway 401 between Rose Glen Road to the west, Croft Street to the south, and Hamilton Road to the east. This industrial area is largely built out. Notable employers in this area include Viceroy Homes (custom home builder) and Azko Noel Wood Coatings (paint manufacturer). The other two Employment Areas are smaller in scale. One is located along Lake Ontario just south of the main commercial area in Port Hope. This area is fully developed and is largely occupied by Cameco Corporation (mining company). The other Employment Area is located in the west end of Port Hope, south of Highway 401. This area is primarily undeveloped with only a few small- to medium-scale industrial tenants.

## **Campbellford**

In Campbellford, existing industrial uses are located along Grand Road in the southern part of the Urban Area. This area is characterized by small-scale building suppliers and contractors. It should also be noted there are a few small industrial users off County Road 30, along the northwestern edge of Campbellford. Industrial businesses in Campbellford provide services largely to residents in the northern part of the County.

## **Hastings**

Hastings has the smallest urban industrial inventory in the County. Approximately half the current designated industrial lands are vacant in Hastings. Of the sites that are occupied, many are not occupied by industrial uses but rather by residential dwellings or commercial uses. The only existing industrial development is located on the east end of Hastings along Front Street East, currently occupied by a vacant industrial building that was once a home goods store.

## **Brighton**

After Cobourg, Brighton has the second largest Urban Employment Area inventory in Northumberland County. The main and largest industrial area is located in the east end



of Brighton. This area is primarily characterized by small to medium-sized industrial users. The largest industrial employers found in Brighton are Vanderlann Building Products Ltd. (building materials supplier), Agrium Advanced Technologies (plant nutrition production), and Wayne Di Canada Inc. (industrial machinery manufacturer). While there are other industrial users along the CN and CP railway, they are typically smaller industrial users.

## **Colborne**

The main Employment Area in Colborne is located along the southern part of the Urban Area north of the CN and CP railway. Much of the lands are still vacant and a small fraction of these lands are currently developed. The largest employer in this area is Storrack Ltd. (material equipment supplier) located along Victoria Street. Other small-scale dry industrial warehousing and storage users are located along Earl Street. It should be noted that there is an industrial park north of the Urban Employment Area, where the majority of the major industrial employers are located. Since the industrial park is outside the Urban Settlement Area, however, it is not included in the urban land needs analysis.

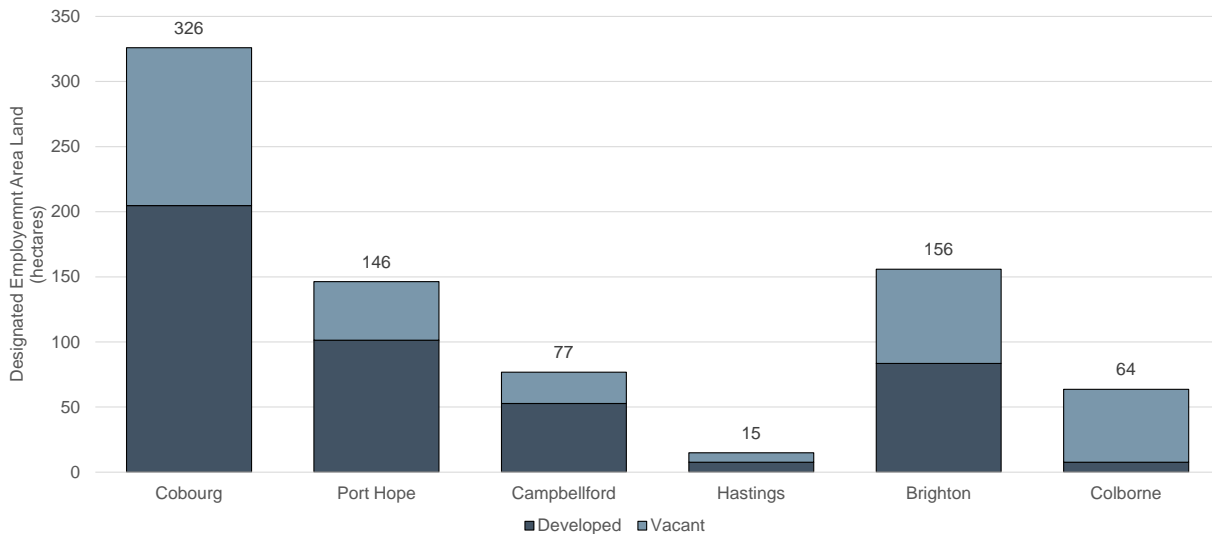
### **6.5.3 Vacant Employment Areas**

Figure 6-9 summarizes the Employment Area land supply in the County's Urban Employment Areas. Key observations include the following:

- As previously mentioned, Cobourg has the largest inventory of designated employment land with 326 ha, of which approximately 121 ha (37%) are currently vacant;
- Brighton has 156 ha of designated Employment Area lands, of which 98 ha (63%) are currently vacant;
- Port Hope has 146 ha of designated Employment lands, of which 45 ha (31%) are currently vacant;
- In Trent Hills, the majority of the urban Employment Area land supply is found in Campbellford. Currently, approximately 30 ha (33%) of Employment Area lands in Trent Hills are vacant; and
- Colborne has 64 ha of vacant designated Employment Area, of which approximately 56 ha (88%) are vacant.



Figure 6-9  
Northumberland County  
Developed and Vacant Urban Employment Area Land Supply



Note: Figures have been rounded and may not add precisely.  
Source: Watson & Associates Economists Ltd., 2021.

#### **6.5.4 Urban Land Vacancy Allowance Adjustment**

Long-term land vacancy is a common characteristic that is experienced in industrial areas throughout Ontario and beyond. Typically, as Employment Areas develop and mature over time, the most marketable sites develop first, often fragmenting the remaining parcels which can limit their market potential for development. As such, a long-term land vacancy allowance is a necessary downward adjustment to the Employment Area land supply, to reflect the fact that 100% of Employment Area lands is unlikely to be absorbed over the long-term planning horizon. More specifically, there are various reasons for this occurring, including:

- Parcels that have become landlocked or difficult to access, with poor road visibility;
- Parcels that are held off the market for speculative reasons (e.g., long-term land banking and/or proposed Employment Area conversions);
- Vacant land required for the expansion of an occupied use on an adjacent site,
- Parcels that are prohibitively expensive to service;
- Sites that are inefficient in size/shape; and





- Sites that have physical constraints (e.g., poor soil conditions, steep topography and/or sites which have unattractive surroundings or potential land-use conflicts).

Figure 6-10 summarizes the land vacancy adjustment for each of the Urban Employment Areas. A land vacancy adjustment of 20% was assumed for all the Employment Areas. As a result, approximately 65 ha of vacant employment land supply has been discounted from the net land inventory. Adjusted for long-term land vacancy, the County's overall net vacant employment land supply is 261 ha.

Figure 6-10  
Northumberland County  
Developed and Vacant Urban Employment Area Land Supply

| Urban Employment Area | Vacant Employment Lands (Hectares)<br>A | Land Vacancy Adjustment (Hectares)<br>B = A X 20% | Vacant Employment Lands Net of Vacancy Adjustment<br>C = A - B |
|-----------------------|---|---|--|
| Cobourg               | 121                                     | 24  | 97   |
| Port Hope             | 45                                      | 9   | 36   |
| Campbellford          | 24                                      | 5   | 19   |
| Hastings              | 8                                       | 2   | 6  |
| Brighton              | 80                                      | 14  | 57   |
| Colborne              | 56                                      | 11  | 45   |
| Northumberland County | 326                                     | 65  | 261  |

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2021.

## 6.6 Employment Area Conversion Sites

Changes to the designation of a site designated as "Employment" to allow for uses not permitted for that designation, including residential, mixed-use and specific commercial uses, is considered an Employment Area land conversion. The conversion of Employment Area lands generally occurs during the M.C.R. process as there is a need to understand the broader impacts of the conversion under the policy framework of the



Growth Plan, 2019 and the P.P.S., 2020, as well as local site-specific considerations. As part of this M.C.R., several Employment Area conversion requests have been reviewed and evaluated.<sup>[67]</sup> Based on this review, a series of recommendations have been made with respect to a number of sites within the Urban Employment Areas where conversion requests have been submitted.

### **6.6.1 Policy Context**

The Growth Plan, 2019 and the P.P.S, 2020 provide a framework for assessing the conversion of lands within Employment Areas. The following briefly summarizes the Growth Plan, 2019 policies in regard to Employment Area conversions (Policies 2.2.5.9 and 2.2.5.10).

Within an M.C.R.:

- Conversions of Employment Areas to non-employment uses may be permitted only through an M.C.R., where it is demonstrated that:
  - there is a need for the conversion;
  - the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
  - the municipality will maintain sufficient employment lands to accommodate forecast employment growth to the horizon of this Plan;
  - the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan; and
  - there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.

Outside an M.C.R.:

- Lands within an existing Employment Area may be converted to non-employment uses outside a municipally initiated M.C.R. (until the next M.C.R) where certain criterion can be met:
  - there is a need for the conversion;

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<sup>[67]</sup> Refer to subsections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.



- the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan;
- there are existing or planned infrastructure and public service facilities to accommodate the proposed uses;
- the conversion must maintain a “significant number” of jobs on the subject lands through the establishment of a development criteria; and
- the site must not be a part of a provincially significant employment zone (P.S.E.Z).

Subsection 2.2.5.11 of the Growth Plan, 2019 further states that any change to an O.P. to permit new or expanded opportunities for major retail in an Employment Area may only occur in accordance with Policy 2.2.5.9 or Policy 2.2.5.10, as previously summarized as the criteria for the M.C.R.

As part of its M.C.R. process, Northumberland County asked local municipal staff to submit requests for properties that are currently designated Employment Area, where conversions to a non-employment use are being sought.<sup>[68]</sup> All requests have been reviewed and evaluated against the provincial Employment Area conversion criteria summarized in subsection 6.6.1.

In total, the County has received eight submissions to convert specific Employment Area sites to non-employment uses, which comprise 20 ha of designated, vacant Employment Area land. These lands have been evaluated based on the provincial framework, as well as a set of local criteria and principles drawing on the following:

- A review of best practices across the G.G.H.; and
- Relevant provincial planning policies and supporting documents related to the Growth Plan, 2019 and the P.P.S., 2020.

### ***6.6.2 Principles for Employment Area Conversions in Northumberland County***

It is important to recognize that structural changes in the broader economy continue to alter the nature of economic activities in Employment Areas as well as impact the built form and character of these lands. It is also important to address that tomorrow's

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<sup>[68]</sup> Submissions were requested to the County by end of September 2021.



industries have siting, space and built-form requirements that are fundamentally different from traditional industrial sites which exist today. This may include requirements related to broad infrastructure, transit access, energy efficiency, building and urban design standards, eco-industrial design principles and labour force access. Site configuration and integration of uses is also evolving particularly in prestige Employment Areas which often integrate operations combining office, research and development, warehousing and logistics, and on-site manufacturing in a “campus-style” setting.

Due to potential negative impacts resulting from the inappropriate conversion of Employment Areas, it is recognized that there is a need to preserve such designated lands within Northumberland County for employment uses. It is also recognized that under some circumstances, an Employment Area conversion may be justified for planning and economic reasons provided such decisions are made through using a systematic approach and methodology as set out herein.

Given the importance of planning for and protecting Employment Areas, a series of principles, as listed below, for approaching the evaluation of employment conversions has been established. These principles are meant to provide further rationale to guide local decision making regarding the conversion of Employment Areas. Again, it is noted that these principles were developed using policy directions and guidance from the P.P.S., 2020, the Growth Plan, 2019, as well as reference to best practices in protecting, planning, and developing employment lands. In total, eight broad Employment Area principles have been established for the County and are summarized below.

**1) Provide specifically designated Employment Area opportunities to establish themselves and their viability.**

There are specific designated Employment Areas that have previously been designated through an exercise which resulted in Council approval (e.g., Council approved O.P.A., Secondary Plans) and because of externalities such as funding agreements, provincial and municipal servicing, requirements for local planning studies, etc., they have not yet established their marketability, viability, and/or presence. A conversion request within these specific designated Employment Areas would be premature and potentially provide a barrier to the implementation of the Employment Area.



**2) Protect Employment Areas in proximity to major transportation corridors and Goods Movement infrastructure to ensure businesses have access to a transportation network that safely and efficiently moves goods and services.**

In contrast to other urban land uses (e.g., commercial, mixed-use and residential areas), Employment Areas provide the opportunity to accommodate industrial sectors that cannot be easily accommodated in other areas of the County. The Growth Plan, 2019 and the P.P.S., 2020 contain policies that protect Employment Areas in proximity to major Goods Movement facilities and corridors which require those locations. To continue to be competitive and attractive to a broad range of industrial and commercial sectors, municipalities need to ensure that medium- to large-scale vacant sites have good access to trade corridors near major highway interchanges as well as other major Goods Movement and transportation facilities such as ports, rail yards, intermodal facilities, and airports.

**3) The configuration, location, and contiguous nature of Employment Areas need to be maintained in order to prevent fragmentation and provide business-supportive environments.**

Preserving the overall configuration, location, and contiguous nature of Employment Areas ensures the County can continue to be competitive and attractive to a broad range of industrial and commercial sectors. Potential risks of Employment Areas becoming fragmented over time are to be mitigated. Encouraging contiguous Employment Areas of critical mass supports market choice and municipal competitiveness, while also enabling businesses to establish relationships and synergies, thereby developing strong business-supportive environments to various scales (i.e., locally and regionally).

**4) Provide a variety of Employment Area lands in order to improve market supply potential and regional attractiveness to a variety of employment sectors and business sizes.**

The County needs to ensure a sufficient supply of municipally serviced (and/or serviceable) lands within Employment Areas, by location, access, site size, zoning, tenure, etc., are offered. This will ensure a sufficient market choice of designated Employment Areas is provided to accommodate a variety of employment sectors and



business sizes. The County will need to ensure that it offers a diverse supply of employment land supply, including a range of parcel sizes.

**5) Retain the employment and job potential of Employment Areas.**

Recommended Employment Area conversions should maintain or improve the County's overall ratio of jobs to population (i.e., employment activity rate), without undermining the functionality and competitive position of existing Employment Areas.

**6) Support efforts of transformative change in Brownfield Areas if it can be demonstrated that the site offers characteristics that support residential intensification and higher-density mixed-use development.**

It is recognized that large abandoned industrial sites, i.e., brownfield sites, may provide opportunities for transformative change over the long term. Efforts that encourage transformative change on brownfield sites should be supported when it can be demonstrated that the employment conversion request supports residential intensification and higher-density mixed-use development (i.e., intensification node or corridor) as set out under the provincial and local Employment Area conversion framework described herein.

**7) Align with County interests and policies related to Employment Areas in order to support achieving municipal goals and mandates of planning for, protecting, and preserving Employment Areas.**

It is recognized that there are various municipal interests and policies related to Employment Areas that speak to planning for, protecting, and preserving Employment Areas. As such, the purpose of this principle is to align as best as possible to County mandates, goals, and objectives, for example, included in the County's Strategic Plan, O.P., Secondary Plans, etc., which provide insight related to the County's vision towards planning for, protecting, and preserving Employment Areas.

**8) Limit and/or mitigate land-use incompatibilities where necessary.**

The Growth Plan, 2019 and the P.P.S., 2020 contain policies that speak to avoiding or limiting land-use incompatibilities with sensitive land uses (e.g., residential uses, education and health care facilities, day care centres). Employment Areas may also accommodate industries that require adequate separation from sensitive land uses.



### **6.6.3 Localized Employment Area Conversion Criteria and Evaluation**

Building on the provincial policy framework and County principles for Employment Areas, a series of local conversion criteria, listed below, has been established as part of the evaluation of Employment Area land conversions. This local evaluation framework has been designed to address the local site characteristics Employment Areas within Northumberland County with respect to site size, physical constraints, access, connectivity and configuration, land-use compatibility issues, economic viability infrastructure and local municipal interests. A key emphasis of the localized criteria relates to the quality of Employment Area lands. This approach recognizes that in certain circumstances an Employment Area conversion may be recommended in the face of a localized or County-wide Employment Area land needs shortfall by 2051, if determined that the local site attributes of the subject lands do not support a feasible long-term outcome for industrial-type development.

As part of this M.C.R., a list of localized criteria was prepared to assist in evaluating Employment Area land conversions. Appendix K provides details of the localized criteria. The following provides a summary of the criteria prepared:

- The site is not located in proximity to major transportation corridors (e.g., highways, rail, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail);
- The site does not offer direct access to major transportation corridors (e.g., highways, rail, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail);
- The site is located outside or on the fringe of an assembly of an Employment Area;
- The site offers limited market supply potential for Employment Areas due to a range of issues (site configuration, size, access, physical conditions and servicing constraints, etc.);
- The proposed conversion to non-employment uses is compatible within surrounding land uses/and or could be mitigated from potential land-use conflicts;
- The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites; and
- The conversion of the site to non-employment uses would not conflict with municipal interests and policies.



#### **6.6.4 Evaluation of Proposed Employment Area Conversion Sites**

Figure 6-11 summarizes the Employment Area land conversion requests received and reviewed as part of this M.C.R. In total, eight sites were reviewed (primarily in Brighton and Hastings) representing approximately 20 designated employment lands, of which approximately 12 ha are vacant. Each of the submissions reviewed seek a land-use redesignation from Employment Area to Urban Community Area (i.e., residential and/or mixed use), within Brighton and Hastings. For additional details about individual employment conversions site, please refer to Appendix J.

As discussed in Chapter 7, there is a significant surplus of Urban Community Area land, totalling over 400 gross ha, in the County's D.G.A. lands within the Urban Areas. In addition, as discussed in Chapter 5, the B.U.A. offers an intensification potential to support a wide-range of housing options, including at-grade housing. Given the sufficiency of the County's potential long-term housing supply in both greenfield and intensification areas, there is not a demonstrated need to create additional Community Area land through the conversion of the County's Employment Areas.

Notwithstanding the sufficiency of the County's Community Area land supply, it is important that all vacant lands which form part of the County's Employment Area inventory are available, serviceable and marketable over the long-term planning horizon. If it is determined that a site is not feasible for Employment Area land development and the conversion of such a site supports the County's local planning principles, such lands will be considered for conversion regardless of long-term Community Area land need.





Figure 6-11  
Northumberland County  
Conversion Request Sites Reviewed

| Site                               | Site Location                    | Employment Area          | Land Area, ha  | Conversion Request | Policy Area | Occupancy | Existing Use     |
|------------------------------------|----------------------------------|--------------------------|----------------|--------------------|-------------|-----------|------------------|
| Site 1                             | 93,99,109 Prince Edward Street   | Brighton Employment Area | 3.1            | Residential        | B.U.A.      | Vacant    | -                |
| Site 2                             | 113 and 115 Prince Edward Street | Brighton Employment Area | 0.2            | Residential        | B.U.A.      | Occupied  | Residential      |
| Site 3                             | 0 Cedar Street                   | Brighton Employment Area | 1.8            | Residential        | D.G.A.      | Vacant    | -                |
| Site 4                             | Elgin Street                     | Hastings Employment Area | 5.9            | Residential        | D.G.A.      | Vacant    | -                |
| Site 5                             | Elgin Street                     | Hastings Employment Area | 2.4            | Mixed Use Area     | D.G.A.      | Occupied  | Community Centre |
| Site 6                             | 94 Front Street East             | Hastings Employment Area | 3.1            | Residential        | B.U.A.      | Occupied  | Industrial       |
| Site 7                             | Albert Street West               | Hastings Employment Area | 1.3            | Residential        | D.G.A.      | Vacant    | -                |
| Site 8                             | Alberta Street West              | Hastings Employment Area | 2.1            | Residential        | D.G.A.      | Occupied  | Residential      |
| <b>Northumberland County Total</b> |                                  |                          | <b>19.9 ha</b> |                    |             |           |                  |

Source: Watson & Associates Economists Ltd.



### **6.6.5 Brighton Employment Area**

As previously mentioned in subsection 6.5.2, existing businesses in this area are primarily small to medium-sized construction or manufacturing businesses. There are three employment conversion requests from Brighton, as summarized in Figure 6-12.

#### **Site 1: 93,99 and 109 Prince Edward Street**

Site 1 is located at 93, 99 and 109 Prince Edward Street in Brighton. Combined, the three parcels total approximately 3.1 ha with frontage along Prince Edward Street. The properties are currently designated as Industrial under the Municipality of Brighton's O.P. and are located in the B.U.A. While there are existing industrial uses located east of the site, they are accessed through internal public roads (i.e., Sharp Road and Craig Boulevard). Any industrial development on this site would have traffic entering from Prince Edward Street, where there are residential uses to the south and west of the subject site. It is recommended that this site be converted to residential use, due to the surrounding uses and proximity/access of these properties via Prince Edward Street.

#### **Site 2: 113 and 115 Prince Edward Street**

Site 2 is located south of Site 1 at 113 and 115 Prince Edward Street. These parcels are currently occupied by an existing residential dwelling, and combined total 0.2 ha. Similar to Site 1, any future industrial development on this site would have traffic entering from Prince Edward Street, which would impact the adjacent residential neighbourhood to the west. Furthermore, properties south of the subject site are designated residential in the current Brighton O.P. It is recommended that this site be converted to residential use, due to the surrounding uses and proximity/access of these properties via Prince Edward Street.

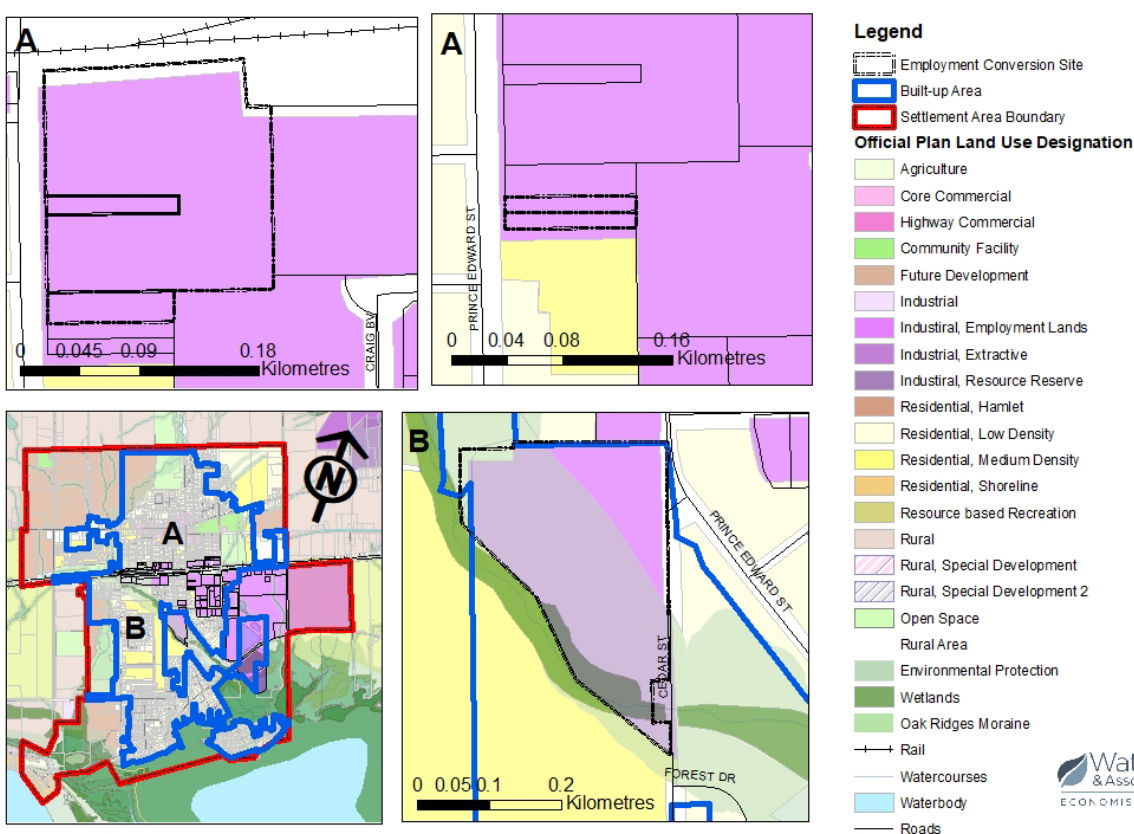
#### **Site 3: 0 Cedar Street**

Site 3, currently designated as Industrial in the Municipality of Brighton's O.P., is located along Cedar Street and is situated on D.G.A. lands. There are small-scale industrial uses to the north of the subject site and there is an established residential neighbourhood to the east and south of the site. This site is not directly connected to the main industrial area as the site is separated by Cedar Street. As such, the site is considered to be on the fringe of Brighton's main industrial area.



It is recommended that all three sites in the Brighton Urban Employment Area be converted to residential/mixed-use.

Figure 6-12  
Northumberland County  
Brighton Employment Land Conversion Request



Source: Watson & Associates Economists Ltd., 2021.



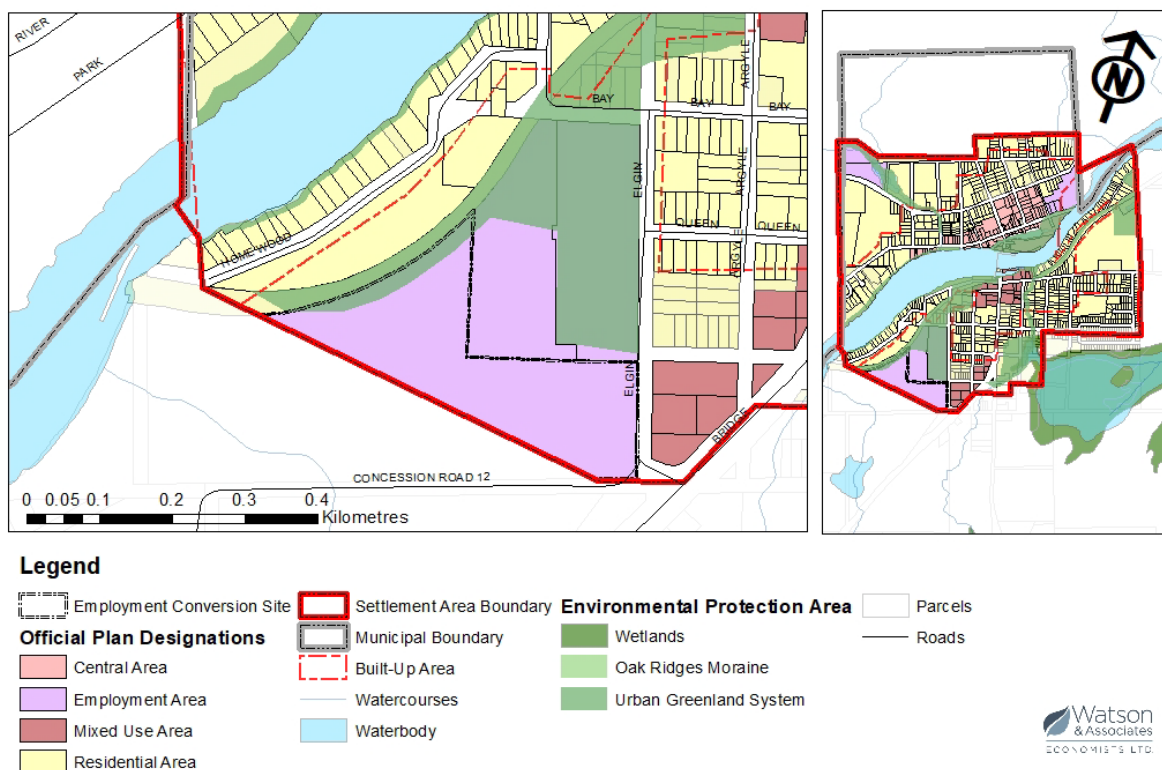
### 6.6.6 Hastings Employment Area

As previously mentioned, Hastings has the smallest urban industrial inventory in the County. In total, there are five Employment Area conversion requests in this area that are described in further detail below.

#### Site 4: Elgin Street

The subject Employment Area conversion site, illustrated in Figure 6-13, is currently vacant and is located at the south end of Hastings. There are no existing industrial uses that surround this site. This site, located directly to the north of the subject stie (also designated as Employment Area), is currently occupied by a municipally owned recreational complex and sports field. These lands have been vacant for the past several years, and over the long term are more appropriate for Community Area development. Accordingly, it is recommended that this site be converted to a residential/mixed use area.

Figure 6-13  
Northumberland County  
Hastings Employment Land Conversion Request

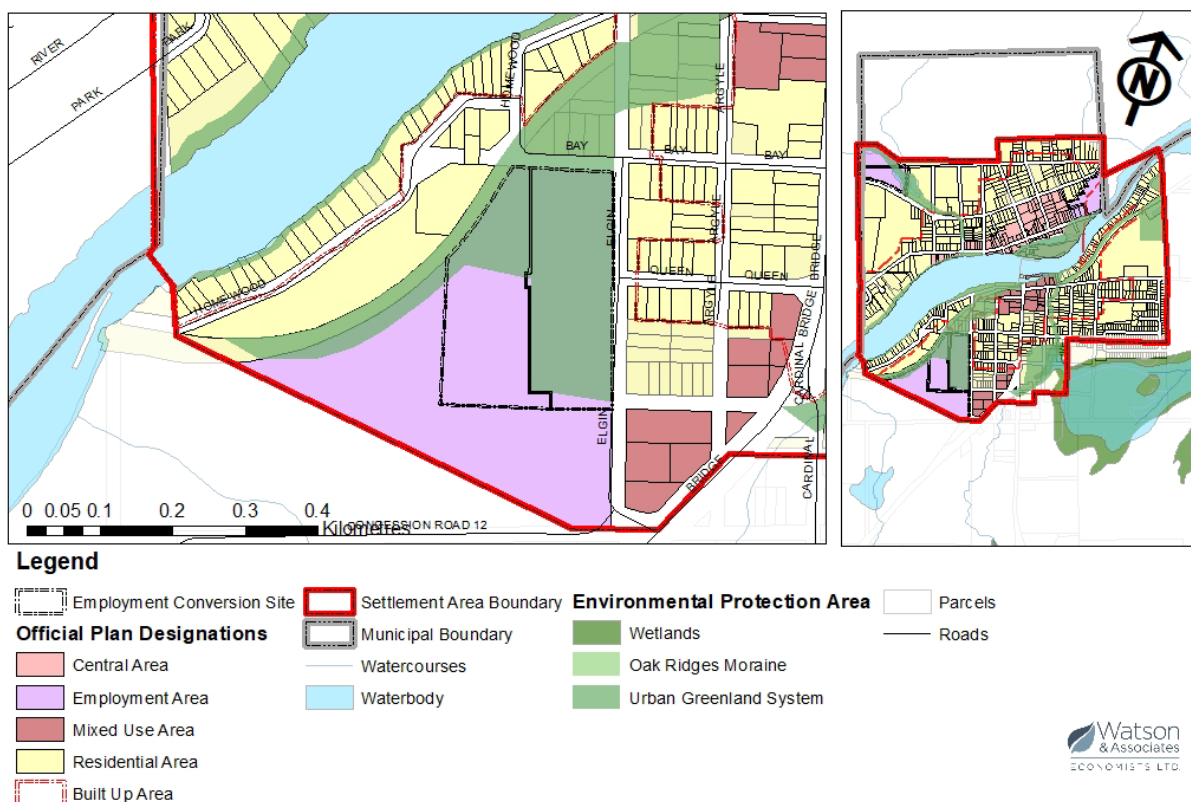




## Site 5: Elgin Street

Figure 6-14 illustrates the location of Site 5. As previously mentioned, this site is partially occupied by a municipally owned recreational complex and sports field. Lands located directly east of the site are designated as Residential. Lands directly west and north of the site are designated as Residential and/or Environmental Protection Area. Site 4, located directly to the south of the subject site is designated Employment Area, and as noted above, is recommended for conversion to residential/mixed use. Accordingly, it is recommended that this site is converted to residential/mixed use to improve land-use compatibility with the surrounding area and current occupied uses.

Figure 6-14  
Northumberland County  
Hastings Employment Land Conversion Request



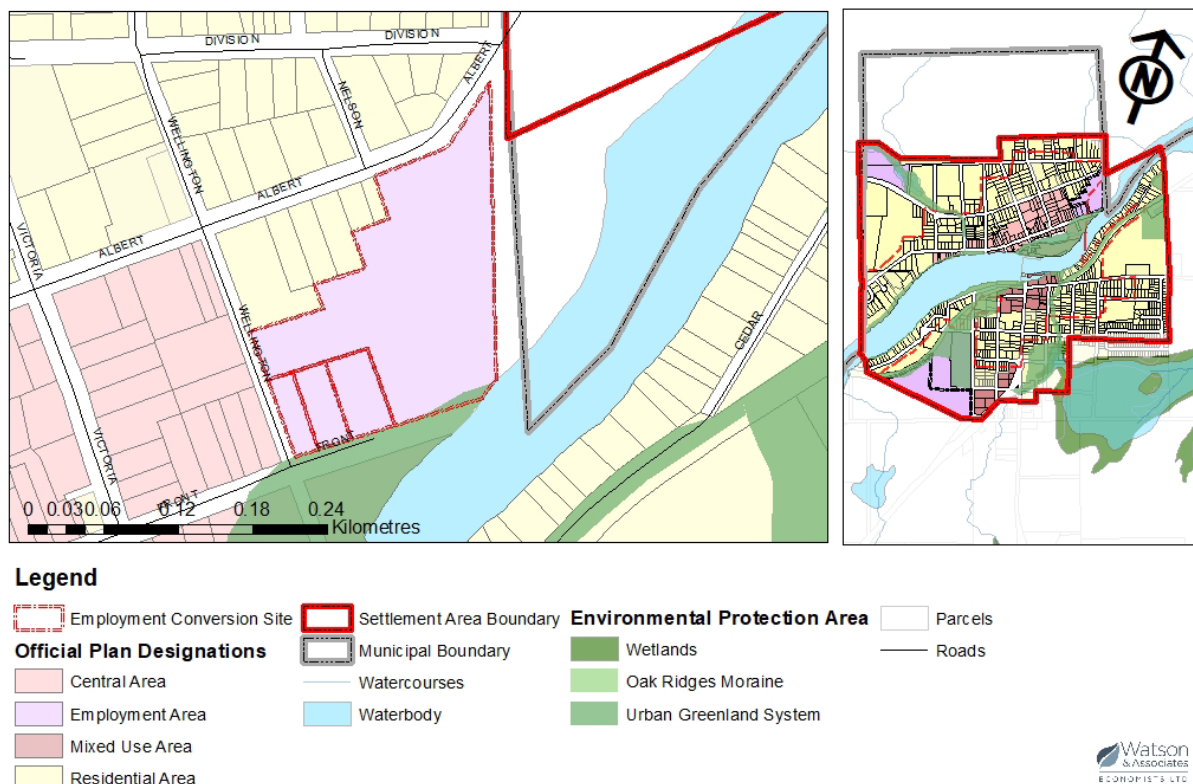
Source: Watson & Associates Economists Ltd., 2021.



## Site 6: 94 Front Street East

Site 6, which is illustrated in Figure 6-15, is located at 94 Front Street East. The site is approximately 2.6 ha and there is currently a vacant industrial building on this property. While the three other parcels are designated as Employment Area along Front Street, two of which are residential homes, the last parcel is occupied by an antique store. The subject site is surrounded by lands designated as residential and mixed-use. The subject site is relatively small and offers limited marketability to accommodate future industrial development. It is recommended that this site is converted to residential uses. It is noted that since this parcel is located in the delineated B.U.A. of Hastings, the recommended conversion does not contribute to the municipality's supply of D.G.A. Community Area land.

Figure 6-15  
Northumberland County  
Hastings Employment Land Conversion Request



Source: Watson & Associates Economists Ltd., 2021.

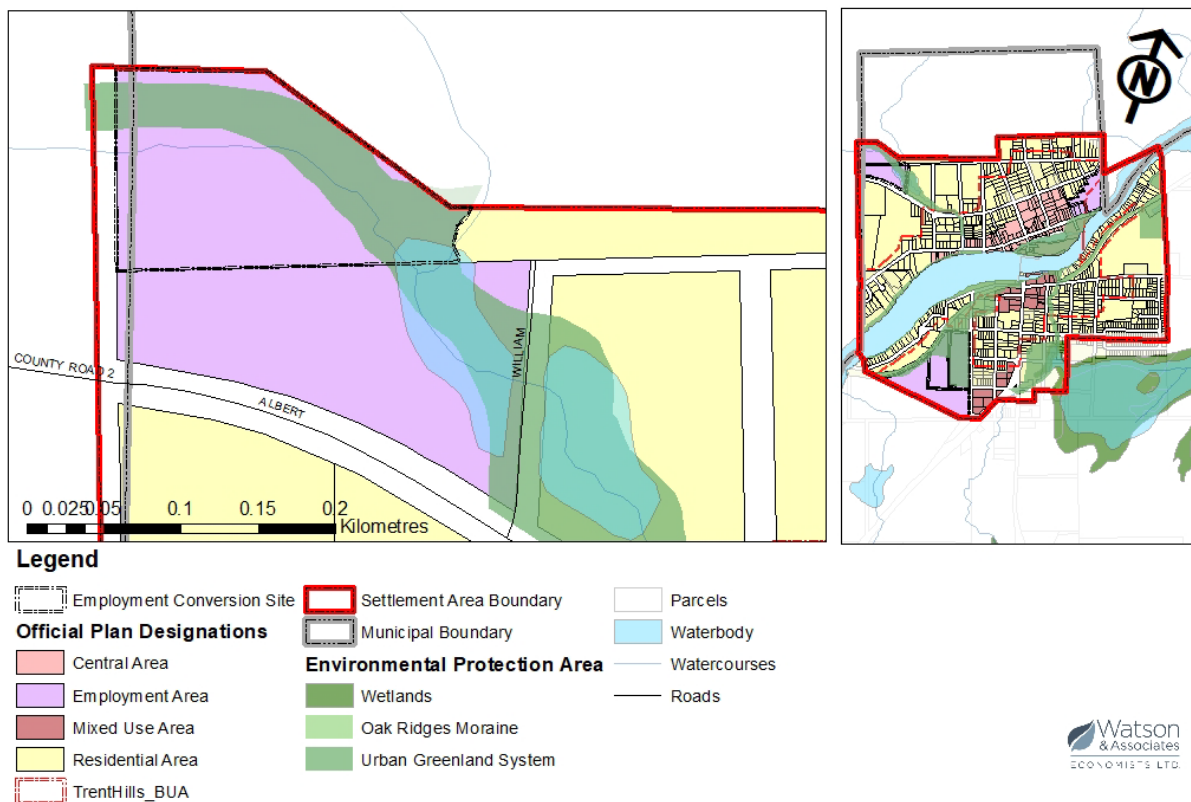




## Site 7: Albert Street West

Site 7, shown in Figure 6-16, is located along Albert Street West in the D.G.A. The subject site is currently vacant and surrounded by residential uses to the east, and rural lands to the north and west. The lands located directly south of the site are designated Employment Area; however, this site is currently occupied by a residential use. The subject site is small in size at approximately 1.3 ha and fragmented from other designated Employment Areas. A portion of the lands is also designated Environmental Protection which further limits the development potential of this site. The site has been vacant for the past several years with no short-term potential for industrial development. This site provides limited local attributes that would attract small- to medium-scale industrial uses. As such, it is recommended that this site be converted to a residential use.

Figure 6-16  
Northumberland County  
Hastings Employment Land Conversion Request



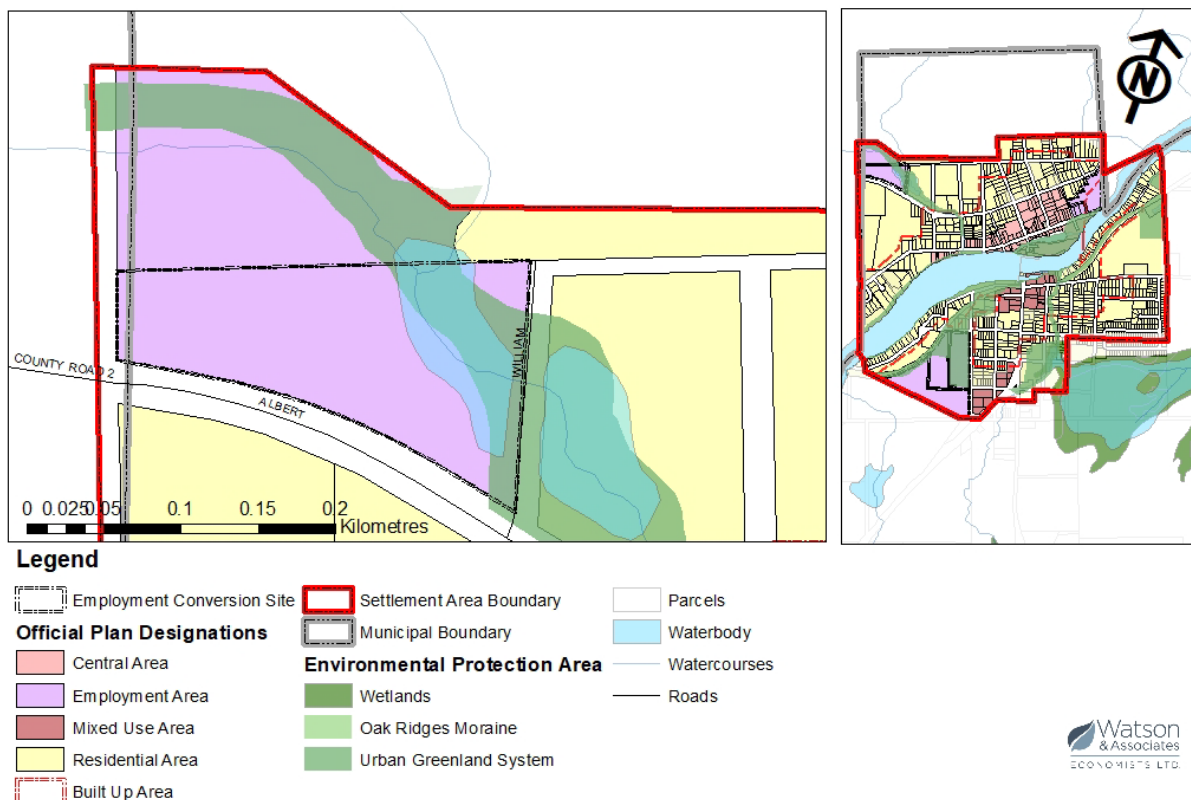
Source: Watson & Associates Economists Ltd., 2021.



## Site 8: Albert Street West

Site 8 is located directly south of Site 7, as shown in Figure 6-17 below. This subject site is approximately 2.1 ha, and similar to Site 7 is located in the D.G.A. A portion of the lands is also designated Environmental Protection which further limits the development potential of this site. As previously noted, Site 8 is currently occupied by an existing residential dwelling. Similar to Site 7, this site provides limited local attributes that would attract small- to medium-scale industrial uses. As such, it is recommended that this site be converted to a residential use.

Figure 6-17  
Northumberland County  
Hastings Employment Land Conversion Request



Source: Watson & Associates Economists Ltd., 2021.





## 6.7 Forecast Employment Growth in Employment Areas

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Figure 6-18 summarizes the County's employment growth outlook on Urban Employment Area lands by local municipality from 2021 to 2051. Key observations include:

- Cobourg and Port Hope will accommodate 78% of the County's overall growth on urban Employment Areas over the next 30 years;
- Within Trent Hills, Campbellford is anticipated to accommodate all employment growth in Urban Employment Areas, accounting for approximately 700 additional jobs and 15% of the County's overall urban employment growth;
- With no other Urban Employment Area in the northern part of Northumberland County, Campbellford is expected to attract employment from other Rural Areas within and surrounding the County; and
- Brighton and Colborne are expected to add approximately 300 and 40 jobs, respectively, within their designated urban Employment Areas.



Figure 6-18  
Northumberland County  
Urban Employment Area Growth

| Employment Areas              | 2021<br>Employment<br>(A) | 2051<br>Employment<br>(B) | 2021 to 2051<br>Employment<br>Growth<br>C = A - B | Intensification<br>Adjustment<br>D = C x 10% | Share of<br>County's<br>Growth |
|-------------------------------|---------------------------|---------------------------|---|--|--------------------------------|
| Cobourg Employment Area       | 4,910                     | 6,860                     | 1,950   | 195  | 40%                            |
| Port Hope Employment Area     | 2,230                     | 4,070                     | 1,840   | 184  | 38%                            |
| Campbellford Employment Area  | 760                       | 1,580                     | 700   | 70   | 15%                            |
| Hastings Employment Area      | 130                       | -                         | -   | -  | -                              |
| Brighton Employment Area      | 1,430                     | 1,730                     | 300   | 30   | 6%                             |
| Colborne Employment Area      | 80                        | 120                       | 40  | 4  | 1%                             |
| <b>Urban Employment Areas</b> | <b>9,530</b>              | <b>14,360</b>             | <b>4,830</b>                                      | <b>483</b>                                   | <b>100%</b>                    |

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

Source: Watson & Associates Economists Ltd., 2021.



## 6.8 Future Density Trends in Employment Areas

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

The evolving form of industrial and non-industrial development on employment lands is also influencing average density levels of employment lands. As previously mentioned, major employers accommodated in Employment Areas are increasingly integrating industrial, office, and training facilities onsite. These sites also require significant land area to accommodate surface parking and, in some cases, future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than stand-alone major office developments.

As discussed in subsection 6.5.2., the current density on employment lands is 21 jobs/net ha. Reflective of anticipated trends in employment growth and employment density by sub-sector, as previously discussed, it is anticipated that forecast employment growth within Employment Areas over the 2021 to 2051 period will average 17 jobs/net ha.

## 6.9 Forecast Land Needs for Employment Areas

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As summarized in Figure 6-19, over the 2021 to 2051 forecast period, approximately 10% of employment growth on employment lands is anticipated to be accommodated through intensification, such as expansions of existing buildings, additional development on already occupied parcels and infill on partially vacant lots. Adjusted for intensification, it is anticipated that Northumberland County will require 258 net ha within Urban Employment Areas to accommodate forecast demand of approximately 4,800 jobs over the 2021 to 2051 period.



Figure 6-19  
Northumberland County  
Forecast Urban Employment Area Land Demand

| Urban Employment Area Land Demand                       | Equation            | Demand<br>2021-2051 |
|---|---------------------|---------------------|
| Urban Employment Areas Employment Growth                | A                   | 4,830               |
| Employment Growth Accommodated by Intensification (10%) | $B = A \times 10\%$ | 483                 |
| Total Employment Growth Adjusted for Intensification    | $C = A - B$         | 4,347               |
| Urban Employment Area Land Density (jobs/gross ha)      | D                   | 17                  |
| Urban Employment Area Land Demand, Net ha               | $E = C / D$         | 258                 |

Source: Watson & Associates Economists Ltd., 2021.

Figure 6-20 summarizes Northumberland County's Urban Employment Area land needs to 2051 based on forecast employment land demand and supply, as identified above (refer to Appendix J for further details). Key highlights include:

- By 2051, Northumberland County is forecast to accommodate approximately 14,400 jobs within its Urban Employment Areas at an average density of 20 jobs per ha;
- Adjusted for a market contingency factor of approximately 10%, the County is anticipated to require a total of 778 ha of land to accommodate forecast additional industrial-type development over the 30-year planning horizon;
- After removing natural heritage features and removing the employment conversions outlined in section 6.6, there are approximately 763 ha of designated Urban Employment Area lands remaining within the County's inventory as of 2021;
- As previously noted in subsection 6.5.4, a long-term land vacancy of 20% has been applied to these lands to reflect sites that are unlikely to develop to their full capacity by 2051. Adjusted for long-term land vacancy, the County's vacant developable Urban Employment Area lands supply is estimated at 763 ha; and



- Comparing the County's long-term Employment Area land demand against remaining vacant land supply opportunities results in a County-wide shortfall of 79 ha by the year 2051.

Figure 6-20  
Northumberland County  
Urban Employment Area Land Needs by 2051

| Northumberland County   | Equation                      | Urban Employment Area at 2051 |
|---|-------------------------------|-------------------------------|
| Employment at 2051  | A                             | 14,360                        |
| Employment at 2051, Adjusted for Intensification                      | B                             | 13,870                        |
| Employment Density (jobs/ha)  | C                             | 20                            |
| Employment Land Demand at 2051 (ha)                                   | $D = B / C$                   | 708                           |
| Employment Land Demand Adjusted for Market Contingencies at 2051 (ha) | $E = D + (D \times 10\%)$     | 778                           |
| Total Designated Employment Land Supply (ha)                          | F                             | 784                           |
| Potential Employment Conversions (ha)                                 | G                             | 20                            |
| Adjusted Designated Employment Land Supply                            | H                             | 763                           |
| Total Designated Employment Land Supply (ha), Adjusted for Vacancy    | I                             | 700                           |
| <b>Employment Area Surplus/(Deficit)</b>                              | <b><math>J = I - E</math></b> | <b>-79</b>                    |

Note: Figures have been rounded and may not add precisely  
Source: Watson & Associates Economists Ltd., 2021.

Similar to Figure 6-20 (above) an Urban Employment Area needs analysis has been carried out for each of the County's Urban Settlement Areas (refer to Appendix I for further details). The results of this analysis indicate that long-term Employment Area urban land needs vary by Urban Settlement Area. In summary, a collective Urban Employment Area shortfall of 146 ha has been identified for Cobourg, Port Hope and Trent Hills. In contrast, an Employment Area surplus of 67 ha has been identified for Brighton and Colborne.



As previously discussed in Chapter 3, market potential for Employment Area development within Northumberland County is anticipated to be strongest for large sites and contiguous lands which are situated within close proximity to the Highway 401 corridor within the Town of Cobourg and the Municipality of Port Hope. Lands that offer direct Highway 401 access and exposure are anticipated to be highly marketable for prestige industrial type uses over the long term.

Cobourg and Port Hope also offer the widest range of potential housing opportunities, urban amenities, and municipal services to attract a growing local labour force necessary to address employment demand within existing and developing Employment Areas. As such, with respect to Urban Employment Areas, it is not appropriate to assume that land surpluses within Brighton and Colborne can be used to off-set land shortfalls within Cobourg, Port Hope, and Trent Hills.

Accordingly, it is recommended that the County's Urban Employment Area lands are expanded by a total of 145 ha to address localized needs collectively within Cobourg, Port Hope, and Trent Hills. It is noted that gross Employment Area land requirements exclude non-developable natural environmental features. As part of the County's O.P.A., further consideration will be given to location options for Urban Employment Area expansion for municipalities where a need has been identified.



Figure 6-21  
Northumberland County  
Urban Employment Area Land Needs by Local Municipality by 2051

|                              | Employment<br>Land Demand<br>A | Employment<br>Land Supply<br>B | Employment<br>Land<br>Conversions<br>C | Employment<br>Area<br>Surplus/(Deficit)<br>D |
|------------------------------|--------------------------------|--------------------------------|--|--|
| Cobourg                      | 332                            | 302                            | -                                      | -31  |
| Port Hope                    | 213                            | 137                            | -                                      | -75  |
| Campbellford                 | 111                            | 72                             | -                                      | -39  |
| Hastings                     | -                              | 15                             | 15                                     | -  |
| Brighton                     | 110                            | 136                            | 5                                      | 26   |
| Colborne                     | 12                             | 52                             | -                                      | 41   |
| <b>Northumberland County</b> | <b>778</b>                     | <b>714</b>                     | <b>20</b>                              | <b>-79</b>                                   |

Source: Watson & Associates Economists Ltd., 2021.



## 6.10 Observations

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As previously noted in Chapter 3, the long-term economic outlook for the County is very positive. As the local employment base and economy within the surrounding commuter-shed continues to grow, Northumberland County will continue to be a desirable location for workers to live, leading to steady population and P.R.E. growth across the County.

Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated in neighbouring municipalities within the G.G.H. Outer Ring and east G.T.H.A. As such, raising the economic profile of Northumberland County by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy will continue to be a key long-term economic development objective for Northumberland County. Achieving the County-wide employment forecast and allocations by local municipality will also require significant investment and effort on behalf of both the public and private sectors to attract and accommodate new employers and facilitate the expansion of existing businesses across a broad range of established and emerging employment sectors.

The results of this M.C.R. indicate that the County will require an additional 145 ha of Urban Employment Area land within the municipalities of Cobourg, Port Hope, and Trent Hills (Campbellford) to accommodate forecast demand within Urban Employment Areas across the County over the next 30 years. It is noted that gross Employment Area land requirements exclude non-developable natural environmental features. As part of the County's O.P.A., further consideration will be given to location options for Urban Employment Area expansion for municipalities in which a need has been identified.





## 7. Planning for Greenfield Community Areas within Northumberland County the Year 2051

This chapter summarizes the County's Community Area D.G.A. land needs specifically for the Urban Areas of Cobourg, Port Hope, Brighton, Campbellford, Hastings and Colborne.

### 7.1 Designated Greenfield Area Land Supply

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#### 7.1.1 D.G.A. Land Supply Methodology

The provincial L.N.A. methodology requires an assessment of land needs be carried out based on the calculation of the total D.G.A. gross developable land area in accordance with the Growth Plan, 2019. The first step in calculating the D.G.A. land supply is to identify the total gross developable land within the Community Area D.G.A., as well as lands that support the function of this area, including non-residential lands (e.g., lands that accommodate population related employment), local roads, parks/trails, recreational lands/facilities and other local infrastructure (e.g., stormwater ponds). Environmental features identified as Natural Heritage System in Schedule A of the County O.P. are excluded from the land supply. Other exclusions include the land area accommodating highways, utility corridors and cemeteries, as these land features support the broader area. Northumberland County G.I.S. data was utilized to calculate the D.G.A. land supply.

It is important to recognize that the D.G.A. land supply includes developed and vacant lands and, therefore, requires an analysis to determine the total amount of population and P.R.E. the D.G.A. can accommodate relative to forecast land demand by the year 2051. The people and jobs density is a key component in determining the yield of population and employment the D.G.A. can ultimately accommodate over the planning horizon.

#### 7.1.2 D.G.A. Land Supply by Status

Figure 7-1 provides a summary of the D.G.A. land supply by status, while Appendix G provides detailed mapping of the D.G.A., identifying the approximate land area of the D.G.A. in large D.G.A. blocks. This analysis was carried out in January 2020, based on a comprehensive review of building permit data and active applications. Again, it is

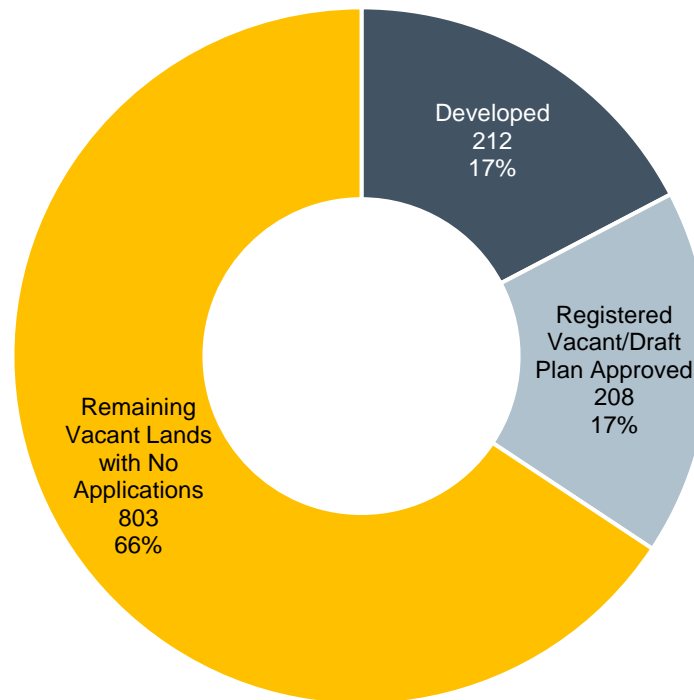


important to note that the land needs assessment is based on total designated land area and total people and jobs at 2051; therefore, updating the base to reflect new growth and development is not necessary. This analysis is used primarily to understand existing D.G.A. density.

As identified in Figure 7-1, the County has 1,222 ha of D.G.A. lands. Approximately 212 ha or 17% of the D.G.A. is developed, while 208 ha or 17% of the land area is anticipated to accommodate approved developments (registered and draft approved). These two development categories represent a little over a third (34%) of the County's D.G.A. land supply and provide insight with respect to existing and near-term residential density trends to assist in determining longer-term density targets as well as the ultimate population and employment yield of the D.G.A. The remaining vacant D.G.A. lands, which are not associated with active development applications, provide a greater opportunity to adjust average density levels. In total, 66% of the County's total D.G.A. land supply falls under this category of vacant lands with no active applications.



Figure 7-1  
Northumberland County  
D.G.A. Land Supply by Status, September 2020



Note: Does not include employment conversion requests. Excludes natural heritage features.  
Source: Data provided by local area municipalities within Northumberland County, summarized by Watson & Associates Economists Ltd., 2021.

### ***7.1.3 Developed and Approved Developments in the D.G.A.***

As previously mentioned, approximately 212 gross ha of D.G.A. lands within the County are developed. As summarized in Figure 7-2, these developed lands accommodate approximately 7,200 people and jobs and generate an average density of 34 people and jobs/gross ha. Average density within the County's D.G.A. lands ranges from 13 people and jobs/gross ha in Colborne to 62 people and jobs/gross ha in Cobourg. Overall, the active development applications with the D.G.A. across Northumberland County have an average density of 36 people and jobs/gross ha (refer to Appendix G, Table 6.2). Accordingly, Northumberland is tracking to the long-term Growth Plan, 2019 density target of 40 people and jobs/gross ha by 2051.



Figure 7-2  
Northumberland County  
Developed D.G.A. Land Area (Hectares), September 2020

| Area Municipality            | Developed Community Area Lands (Gross Hectares)<br>A | Existing Population on Developed D.G.A. Lands <sup>[1] [2]</sup><br>B | Existing Jobs on Developed D.G.A. Lands <sup>[1] [2]</sup><br>C | Existing Population and Jobs on Developed D.G.A. Lands <sup>[1] [2]</sup><br>D = B + C | Existing Population and Job Density (Gross/Hectares)<br>E = D / A |
|------------------------------|--|---|---|--|---|
| Town of Cobourg              | 58   | 3,351   | 234   | 3,585  | 62  |
| Municipality of Port Hope    | 32   | 1,062   | 180   | 1,242  | 39  |
| Municipality of Trent Hills  | 22   | 289   | 73  | 361  | 17  |
| Campbellford                 | 8  | 102   | 29  | 131  | 16  |
| Hastings                     | 14   | 187   | 43  | 230  | 17  |
| Municipality of Brighton     | 78   | 1,458   | 287   | 1,745  | 22  |
| Township of Cramahe          | 21   | 198   | 73  | 271  | 13  |
| Colborne                     | 21   | 198   | 73  | 271  | 13  |
| <b>Northumberland County</b> | <b>212</b>   | <b>6,358</b>  | <b>847</b>  | <b>7,205</b>   | <b>34</b>   |

<sup>[1]</sup> Population based on the following average P.P.U. with a net Census undercount estimated at approximately 2.3%:

Low density (single and semi-detached units): 2.589

Medium density (townhouses and apartments in duplexes): 2.022

High density (bachelor, 1-bedroom, 2-bedroom+ apartment units): 1.573

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied floor space per worker assumption of 1 job per 450 square feet (sq.ft.).

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2021.

## 7.2 Community Areas – D.G.A. Land Needs Analysis, 2051

### 7.2.1 Population and Housing Growth

Figure 7-3 summarizes the population and housing forecast for Northumberland County's D.G.A. For additional information about the population and housing forecast by local municipality and policy area, please refer to Appendix D, and for Community Area land needs analysis by area municipality please refer to Appendix G. Key highlights include:



- In total, the County's D.G.A. lands are anticipated to accommodate approximately 10,330 additional housing units, bringing the total number of housing units in the D.G.A. to approximately 13,200 households by 2051;
- By 2051, it is anticipated that the D.G.A. will accommodate a population base of 28,700 persons, just under a quarter (24%) of the County's total population base by 2051; and
- Between 2021 and 2051, the forecast share of housing by structure type in the D.G.A. is as follows:
  - Low Density: 36%
  - Medium Density: 41%
  - High Density: 24%

Figure 7-3  
Northumberland County D.G.A.  
Housing and Population Forecast by 2051

| Year             | Population<br>(Including<br>Census<br>Undercount) | Low-<br>Density<br>Households | Medium-<br>Density<br>Households | High-<br>Density<br>Households | Total<br>Households |
|------------------|---|-------------------------------|----------------------------------|--------------------------------|---------------------|
| 2021             | 6,400   | 1,800                         | 500                              | 560                            | 2,870               |
| 2051             | 28,700  | 5,480                         | 4,710                            | 3,000                          | 13,190              |
| <b>2020-2051</b> | <b>22,300</b>                                     | <b>3,680</b>                  | <b>4,210</b>                     | <b>2,440</b>                   | <b>10,330</b>       |

Note: Number have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd., 2021.

## 7.2.2 Community Area Employment Growth

Over the forecast period, it is assumed that 1 P.R.E. job is required for every 4.5 residents in the D.G.A. Compared to the B.U.A., fewer P.R.E. jobs relative to the population base are anticipated on D.G.A. lands. Work at home employment is forecast to represent a larger component of P.R.E. in the D.G.A. compared to the B.U.A. The D.G.A. currently has a small commercial and institutional base (approximately 850 jobs) on which to build. By 2051, it is forecast that approximately 5,700 jobs will be accommodated within the D.G.A. in Northumberland County.

## 7.2.3 Community Area D.G.A. Land Needs to 2051

Figure 7-4 identifies the Community Area land needs in Northumberland County. Key observations include the following:



- As previously noted, the County is anticipated to accommodate a population base in the D.G.A. of 28,700 by 2051;
- The County is anticipated to achieve a density of 40 people and jobs/gross ha by 2051, based on a review of existing development, approved development applications and anticipated long-term development trends on vacant D.G.A lands; and
- The D.G.A. has a supply of 1,270 gross ha of developable land, which is greater than the land requirement of 861 gross ha to accommodate 34,400 people and jobs. As a result, the County is estimated to have a surplus of Community Area land of approximately 409 gross ha by 2051.

Figure 7-4  
Northumberland County  
Community Area Land Needs to 2051

| Community Area Land Needs                               | Equation    | Total D.G.A. |
|---|-------------|--------------|
| Total D.G.A. Population Forecast at 2051 <sup>[1]</sup> | A           | 28,700       |
| Total D.G.A. Employment Forecast at 2051                | B           | 5,720        |
| Total D.G.A. Population & Employment Forecast at 2051   | $C = A + B$ | 34,420       |
| People and Jobs Density/gross ha                        | D           | 40           |
| Land Requirement, gross ha                              | $E = C / D$ | 861          |
| Total D.G.A. Land Area, gross ha                        | F           | 1,261        |
| Potential Employment Land Conversions <sup>[2]</sup>    | G           | 9            |
| Updated D.G.A. Land Area                                | $H = F + G$ | 1,270        |
| Land Surplus at 2051, gross ha                          | $I = H - E$ | 409          |

<sup>[1]</sup> Includes net Census undercount estimated at approximately 2.3%

<sup>[2]</sup> Refer to section 6.6 of this report for employment conversions.

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

Source: Watson & Associates Economists Ltd., 2021.



Similar to Figure 7-4 (above), a Community Area D.G.A. urban needs analysis has been carried out for each of the County's Urban Settlement Areas (refer to Appendix H). Figure 7-5 summarizes which Urban Settlement Areas are anticipated to have a surplus or shortfall of D.G.A. Community Area lands by the year 2051. The results of this analysis indicate that long-term Community Area urban land needs vary by Urban Settlement Area. In summary, Cobourg, Campbellford, Brighton and Colborne are all identified to have Community Area surpluses by the year 2051. On the other hand, Hastings has sufficient D.G.A. Community Area lands, while a shortfall of 131 ha has been identified for Port Hope.

Figure 7-5  
Northumberland County  
Community Area Land Needs to 2051 by Urban Settlement Area

| Area Municipality         | Community Area Land Surplus/ (Deficit)<br>A | Potential Employment Conversions<br>B | Updated Community Area Surplus/ (Deficit)<br>D = A – B |
|---------------------------|---|---------------------------------------|--|
| Town of Cobourg           | 80  |                                       | 80   |
| Municipality of Port Hope | -131  |                                       | -131   |
| Campbellford              | 124   |                                       | 124  |
| Hastings                  | -7  | 7                                     | 0  |
| Municipality of Brighton  | 193   | 2                                     | 195  |
| Colborne                  | 142   |                                       | 142  |
| Northumberland County     | 400   | 9                                     | 409  |

Note: Numbers may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd. 2021.

## 7.3 Excess Community Area Lands

As previously discussed, the County has a surplus of 409 ha of D.G.A. Community Area lands. The Growth Plan, 2019 requires that upper-tier and single-tier municipalities



within the G.G.H. Outer Ring determine excess lands.<sup>[69]</sup> In accordance with subsection 2.2.1.6., municipalities will:

- a) determine which lands will be identified as excess lands based on the hierarchy of settlement areas established in accordance with policy 2.2.1.3;
- b) prohibit development on all excess lands to the horizon of this Plan;  
and
- c) where appropriate, use additional tools to reduce the land that is available for development, such as those set out in policies 5.2.8.3 and 5.2.8.4.”

Subsection 5.2.8.2 of the Growth Plan, 2019 states:

“In implementing the policies of this Plan, municipalities are encouraged to use available tools to reduce or eliminate any excess lands.”

In accordance with the policies of the Growth Plan, 2019, the County of Northumberland has consulted extensively with each of the local municipalities within the County to identify potential excess lands at the parcel level. In total, 110 ha of excess Community Area lands have been identified within Cobourg (39 ha), Trent Hills (69 ha) and Brighton (2 ha). It is noted that the excess Community Area lands identified in Cobourg and Trent Hills are not considered interchangeable with the identified shortfall of Urban Employment Areas discussed in Chapter 7.

These lands have been identified in an effort to direct urban development to locations where an urban development need has been identified, and prohibit development in other urban locations that are not anticipated to be needed for urban development over the planning horizon. It should be recognized that identified excess lands will be subsequently reviewed within ten years at the time of the County’s next M.C.R. During this subsequent review, some of the County’s excess lands may be required for urban development and re-introduced into the developable D.G.A. Community Area inventory.

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<sup>[69]</sup> Page 70 of the Growth Plan, 2019 defines Excess Lands as “Vacant, unbuilt but developable lands within settlement areas but outside of delineated built-up areas that have been designated in an official plan for development but are in excess of what is needed to accommodate forecasted growth to the horizon of this Plan.”



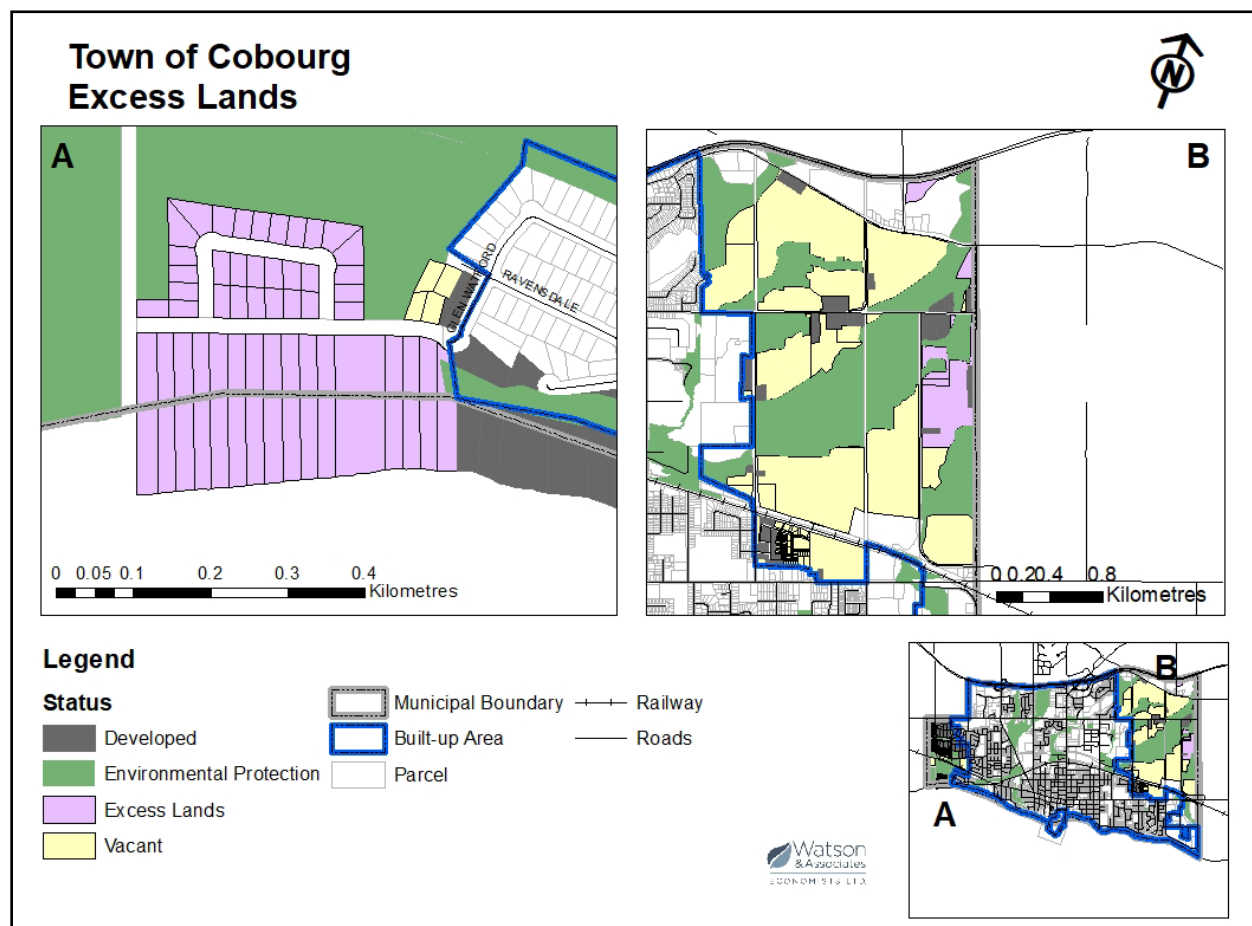


An objective of the Northumberland County M.C.R. is to address localized urban land needs while at the same time not exacerbating the County's total Community Area D.G.A. land surplus. By identifying these excess lands, it is the County's intention to expand the urban boundary of Port Hope to address the localized Community Area D.G.A. land needs for this area. Figure 7-6 and Figure 7-7 geographically identify excess lands within the County by the local area municipalities.

It is recommended that the County's new O.P. identify excess Community Area lands that will be subject to a special policy overlay. This overlay will identify excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.



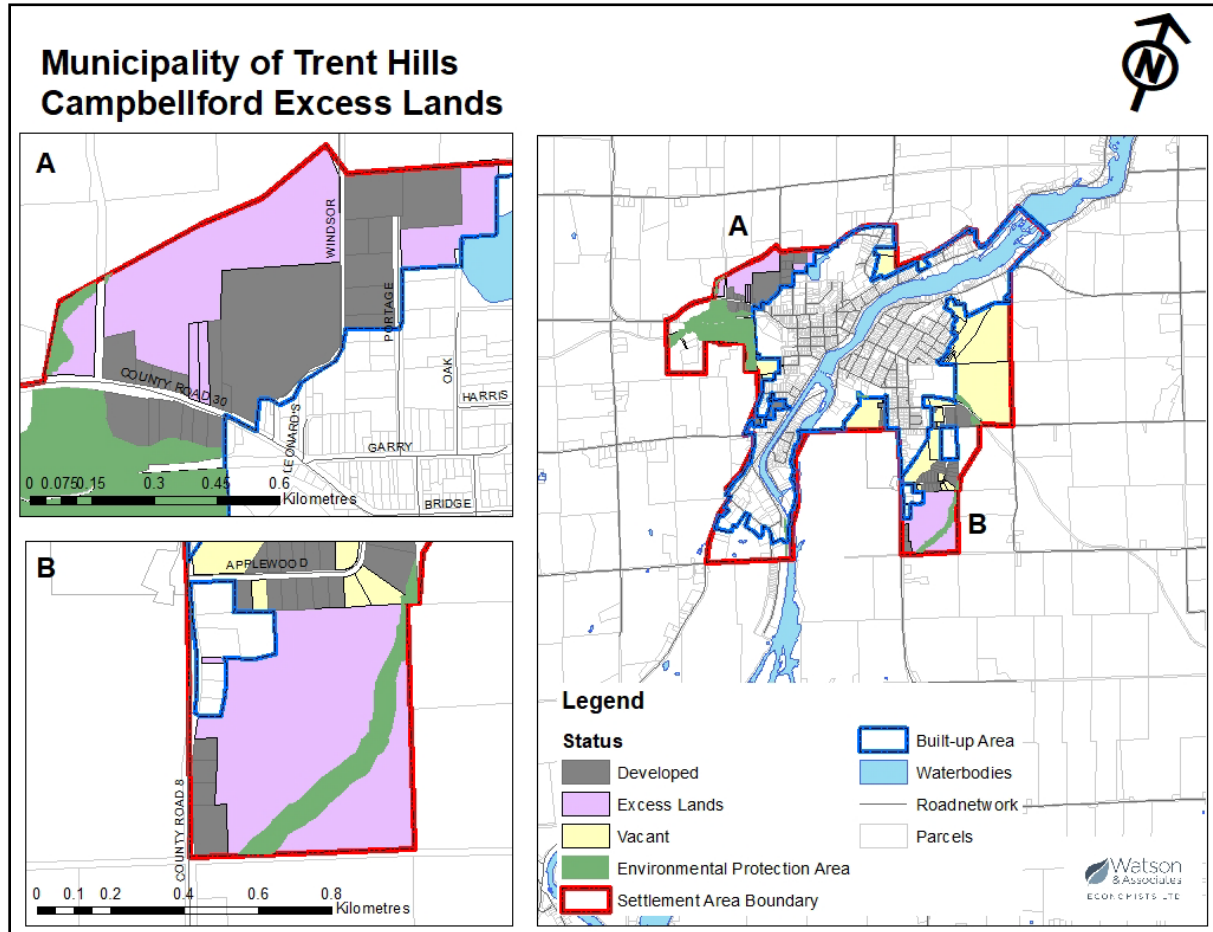
Figure 7-6  
Northumberland County  
Excess Lands



Source: Excess lands identified by the Town of Cobourg presented by Watson & Associates Economists Ltd., 2021.



Figure 7-7  
Northumberland County  
Excess Lands



Source: Excess lands identified by the Municipality of Trent Hills presented by Watson & Associates Economists Ltd., 2021.

## 7.4 Observations

The County has a robust supply of potential housing development in the planning approvals process (i.e., development pipeline). The County's supply of housing in the development pipeline is anticipated to accommodate a greater range of housing options compared to the existing D.G.A. base.

Based on the comprehensive analysis carried out herein, it has been determined that the County has a surplus of Community Area land of approximately 409 gross ha to



2051. These surplus lands are not considered to be needed until the post-2051 period, and will be subject to ongoing review upon subsequent O.P. reviews.

Notwithstanding this identified County-wide Community Area surplus, the results of this M.C.R. indicate that long-term Community Area urban land needs vary significantly by Urban Settlement Area. More specifically, the Town of Cobourg, and the Urban Areas of Campbellford, Brighton, and Colborne are all identified to have Community Area surpluses by the year 2051. On the other hand, the Urban Area of Hastings has a sufficient supply of D.G.A. Community Area lands, while a Community Area shortfall of 131 ha has been identified for the Municipality of Port Hope. In accordance with the results of this M.C.R. an urban boundary expansion of 131 gross ha is recommended within the Municipality of Port Hope to accommodate identified Community Area land needs to the year 2051 within this area of the County.



## 8. Conclusions

The following conclusions are provided below with respect to the long-term population, housing and employment growth outlook as well as corresponding urban land needs in Northumberland County to the year 2051.

### 8.1 Population and Housing Growth Forecast

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By 2051, the County's total population base is forecast to grow to approximately 122,000. This represents an increase of approximately 34,400 persons between 2016 and 2051, or an average annual population growth rate of 1.0% during this period. To accommodate the long-term population forecast, the County will require approximately 15,000 additional new households to be constructed over the next 30 years. It is anticipated that a large component of housing growth will include low-density housing; however, increasing demand is also anticipated for medium-density and high-density housing forms to provide greater choice in housing options by type and tenure for a broad range of residents by age and income.

### 8.2 Recommended Residential Intensification Target

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The current Northumberland O.P. has identified an intensification target of 40%. The results of this M.C.R. identify that this target is not considered to be realistic based on historical development trends and anticipated demand for housing within the B.U.A. across the County. During the 2022 to 2051 planning horizon, a 17% County-wide residential intensification target is recommended as an alternative intensification target for Northumberland County.

Within the County, Cobourg and Port Hope provide the greatest opportunity to accommodate a wide range of housing options (low, medium, and high density) within the B.U.A. Market demand for residential intensification is considered to be modest throughout the County's remaining Urban Areas.



## 8.3 Employment Forecast and Urban Employment Area Land Needs

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As previously noted, the long-term economic outlook for the County is very positive. As the local employment base and economy within the surrounding commuter-shed continues to grow, Northumberland County will continue to be a desirable location for workers to live, leading to steady population and population-related employment growth across the County.

In accordance with Schedule 3 of the Growth Plan, 2019, Northumberland County's employment base is forecast to reach 44,000 jobs by 2051. Based on the County's current employment base of 32,370 jobs as of 2021 and the Growth Plan, 2019 forecast of 44,000 jobs by 2051, Northumberland County is forecast to add approximately 11,600 jobs, which represents an annual growth rate of approximately 1.0%.

By 2051, Northumberland County is forecast to accommodate approximately 14,400 jobs within its Urban Employment Areas at an average density of 20 jobs per ha. To accommodate forecast demand in Employment Areas, the County will require an additional **145 gross ha** of designated urban Employment Area Lands within the Town of Cobourg, the Municipality of Port Hope, and the Urban Settlement Area of Campbellford.<sup>[70]</sup> It is also important to acknowledge that Urban Employment surpluses have been identified for Brighton and Colborne by 2051.

As part of the County's Official Plan Amendment (O.P.A.) process, further consideration will be given to location options for Urban Employment Area expansion for municipalities where a need has been identified. Market potential for Employment Area development within Northumberland County is anticipated to be strongest for large sites and contiguous lands that are situated within close proximity to the Highway 401 corridor within the Town of Cobourg and the Municipality of Port Hope. Lands that offer direct Highway 401 access and exposure are anticipated to be highly marketable for prestige industrial type uses over the long term. Cobourg and Port Hope also offer the widest range of potential housing opportunities, urban amenities, and municipal services to attract a growing local labour force necessary to address employment demand within

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<sup>[70]</sup> Gross land requirements exclude land associated with the County's natural heritage system.

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existing and developing Employment Areas. As such, in addressing the County's long-term Urban Employment Areas needs, it is not appropriate to assume that land surpluses within Brighton and Colborne can be used to off-set land shortfalls within Cobourg, Port Hope and Trent Hills.

## **8.4 Community Area Land Needs Assessment**

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In accordance with the requirements of the L.N.A., a Community Area D.G.A. urban land needs analysis has been carried out for each of the County's Urban Settlement Areas (refer to Appendix H). At the County-wide level, Northumberland is forecast to have a surplus of approximately 409 ha to accommodate forecast D.G.A. Community Area land needs to the year 2051. Notwithstanding this identified County-wide Community Area surplus, the results of this M.C.R. indicate that long-term Community Area urban land needs vary significantly by Urban Settlement Area. More specifically, the Town of Cobourg, and the Urban Areas of Campbellford, Brighton, and Colborne are all identified to have Community Area surpluses by the year 2051. On the other hand, the Urban Area of Hastings has sufficient D.G.A. Community Area lands, while a Community Area shortfall of 131 ha has been identified for the Municipality of Port Hope. In accordance with the results of this M.C.R., an urban boundary expansion of 131 gross ha is recommended within the Municipality of Port Hope to accommodate identified Community Area land needs to the year 2051 within this area of the County.

### **8.4.1 Excess Lands**

An objective of the Northumberland County M.C.R. is to address localized urban land needs while at the same time not exacerbating the total Community Area D.G.A. land surplus identified across the County to the year 2051. By identifying excess lands within Northumberland County, it is the County's intention to expand the urban boundary of Port Hope to address the localized Community Area D.G.A. land needs for this area.

In accordance with the policies of the Growth Plan, 2019, the County of Northumberland has consulted extensively with each of the local municipalities within the County to identify potential excess lands at the parcel level. In total, 110 ha of excess Community Area lands have been identified across the Urban Areas of Cobourg, Campbellford, and Brighton. These lands have been identified in an effort to direct urban development to locations where an urban development need has been identified, and prohibit



development in other urban locations that are not anticipated to be needed for urban development over the planning horizon of the County O.P. The specific location of these parcels is summarized in section 7.3. herein.

It should be recognized that identified excess lands will be subsequently reviewed within ten years at the time of the County's next M.C.R. During this subsequent review, some of the County's excess lands may be required for urban development and re-introduced into the developable D.G.A. Community Area inventory.





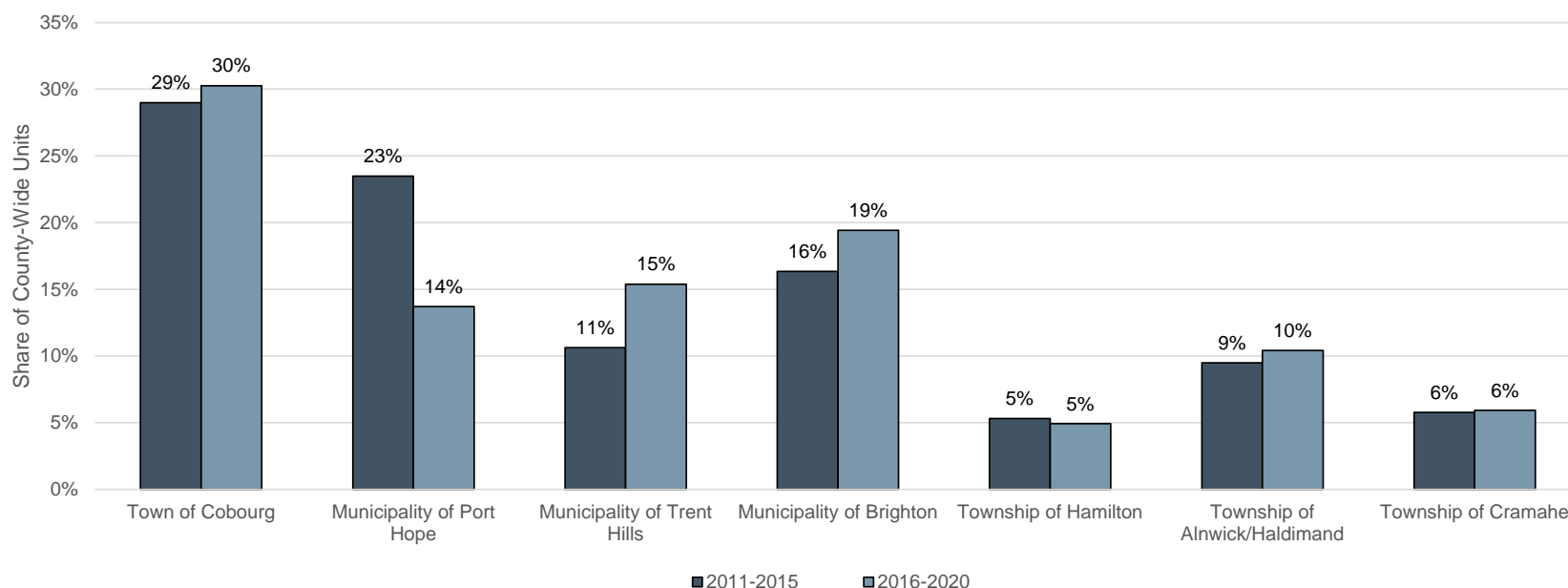
# Appendix A:

## Northumberland County Supplementary Economic, Socio-Economic and Demographic Profile Data



# Appendix A: Northumberland County Supplementary Residential Building Permit Data

## A.1 Historical Residential Building Permit Share by Area Municipality, 2011 to 2020



Note: 2020 is an estimate by Watson & Associates Economists Ltd., 2021.

Source: Historical building permit data from local municipalities within Northumberland County, presented by Watson & Associates Economists Ltd., 2021.



## A.2 Historical Building Permits by Area Municipality and Planning Policy Area, 2016 to 2020

### Total Building Permits

| Area Municipality             | B.U.A. | D.G.A. | Rural | 2016-2019 |
|-------------------------------|--------|--------|-------|-----------|
| Town of Cobourg               | 24     | 399    | 0     | 423       |
| Municipality of Port Hope     | 138    | 41     | 60    | 239       |
| Municipality of Trent Hills   | 33     | 67     | 193   | 293       |
| Municipality of Brighton      | 132    | 150    | 83    | 365       |
| Township of Hamilton          | 0      | 0      | 97    | 97        |
| Township of Alnwick/Haldimand | 0      | 0      | 160   | 160       |
| Township of Cramahe           | 25     | 18     | 72    | 115       |
| Northumberland County         | 352    | 675    | 665   | 1,692     |

### Share Based on Policy Area

| Area Municipality             | B.U.A. | D.G.A. | Rural | 2016-2019 |
|-------------------------------|--------|--------|-------|-----------|
| Town of Cobourg               | 6%     | 94%    | 0%    | 100%      |
| Municipality of Port Hope     | 58%    | 17%    | 25%   | 100%      |
| Municipality of Trent Hills   | 11%    | 23%    | 66%   | 100%      |
| Municipality of Brighton      | 36%    | 41%    | 23%   | 100%      |
| Township of Hamilton          | 0%     | 0%     | 100%  | 100%      |
| Township of Alnwick/Haldimand | 0%     | 0%     | 100%  | 100%      |
| Township of Cramahe           | 22%    | 16%    | 63%   | 100%      |
| Northumberland County         | 21%    | 40%    | 39%   | 100%      |

Source: Historical building permit data from local municipalities within Northumberland County summarized by Watson & Associates Economists Ltd., 2021.



# Appendix B:

## Northumberland County Housing Headship Rates



## Appendix B: Northumberland County Housing Headship Rates

### B.1 Housing Headship Rates, 2006 to 2051

| Age Cohort | 2006    | 2011    | 2016    | 2021    | 2026    | 2031    | 2036    | 2041    | 2046    | 2051    |
|------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 0-14       |         |         |         |         |         |         |         |         |         |         |
| 15-24      | 0.04971 | 0.05517 | 0.04846 | 0.04846 | 0.04846 | 0.04914 | 0.04963 | 0.05001 | 0.05060 | 0.04846 |
| 25-34      | 0.37660 | 0.34256 | 0.36269 | 0.36269 | 0.36269 | 0.36777 | 0.37140 | 0.37430 | 0.37865 | 0.36269 |
| 35-44      | 0.47432 | 0.48613 | 0.48768 | 0.48768 | 0.48768 | 0.49451 | 0.49938 | 0.50329 | 0.50914 | 0.48768 |
| 45-54      | 0.51456 | 0.53463 | 0.51368 | 0.51368 | 0.51368 | 0.52088 | 0.52601 | 0.53012 | 0.53629 | 0.51368 |
| 55-64      | 0.54580 | 0.53409 | 0.56008 | 0.56008 | 0.56008 | 0.56792 | 0.57352 | 0.57800 | 0.57800 | 0.56008 |
| 65-74      | 0.61492 | 0.61949 | 0.58199 | 0.58199 | 0.58199 | 0.59014 | 0.59596 | 0.60061 | 0.60061 | 0.58199 |
| 75+        | 0.58062 | 0.58587 | 0.58193 | 0.58193 | 0.58193 | 0.59007 | 0.59589 | 0.60055 | 0.60055 | 0.58193 |
| Total      | 0.37800 | 0.39627 | 0.40730 | 0.41670 | 0.42318 | 0.42796 | 0.42944 | 0.43060 | 0.43209 | 0.43299 |

Source: 2006 to 2016 derived from Statistics Canada data, 2021 to 2051 forecast by Watson & Associates Economists Ltd., 2021.



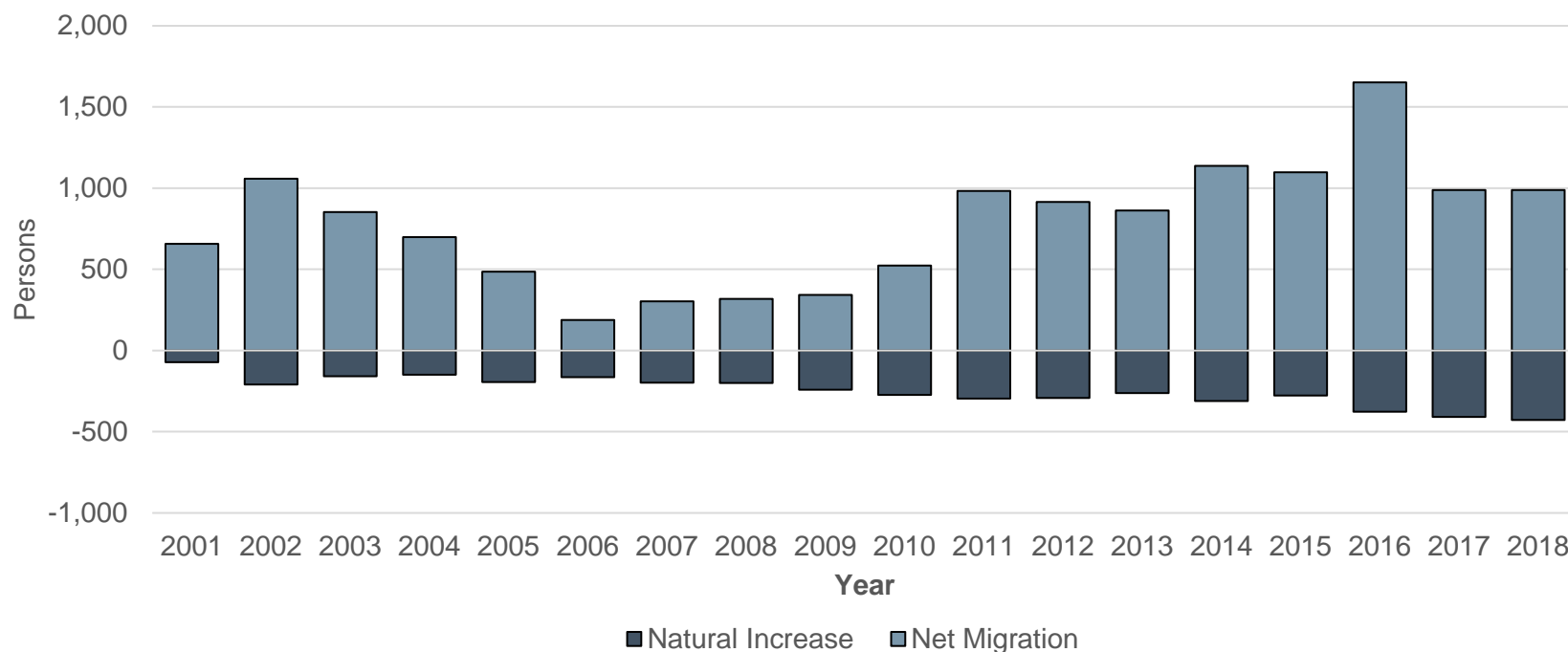
# Appendix C:

## Northumberland County Population, Housing and Employment Forecast



# Appendix C: Northumberland County Population, Housing and Employment Forecast

## C.1 Historical Components of Population Growth, 2001 to 2018



Note: Population includes net Census undercount estimated at approximately 2.3%.

Source: Data derived from Statistics Canada Table 17-10-0140-01 by Watson & Associates Economists Ltd., 2021.



## C.2.A Population by Age Cohort, 2001 to 2051

| Cohort | 2001   | 2006   | 2011   | 2016   | 2021   | 2026   | 2031    | 2036    | 2041    | 2046    | 2051    |
|--------|--------|--------|--------|--------|--------|--------|---------|---------|---------|---------|---------|
| 0-19   | 20,700 | 19,000 | 17,000 | 16,100 | 15,900 | 16,300 | 17,700  | 18,600  | 19,500  | 20,100  | 20,800  |
| 20-34  | 12,400 | 12,100 | 12,100 | 12,500 | 12,000 | 12,100 | 12,700  | 14,300  | 15,900  | 17,200  | 18,500  |
| 35-44  | 13,200 | 11,600 | 9,100  | 8,800  | 8,700  | 8,700  | 9,000   | 9,200   | 9,700   | 10,700  | 12,000  |
| 45-54  | 11,700 | 13,400 | 14,200 | 12,500 | 10,300 | 9,900  | 10,600  | 11,500  | 12,200  | 12,800  | 13,500  |
| 55-64  | 8,600  | 11,500 | 13,700 | 15,300 | 17,000 | 16,500 | 13,900  | 13,700  | 14,400  | 15,600  | 16,500  |
| 65-74  | 7,700  | 8,300  | 9,900  | 12,900 | 15,200 | 17,400 | 19,500  | 18,100  | 15,700  | 15,500  | 16,400  |
| 75+    | 6,200  | 7,500  | 8,100  | 9,400  | 11,500 | 14,700 | 17,600  | 21,400  | 24,600  | 25,100  | 24,200  |
| Total  | 80,500 | 83,500 | 84,100 | 87,600 | 90,700 | 95,500 | 101,000 | 106,600 | 112,000 | 117,000 | 122,000 |

Note: Population includes net Census undercount estimated at approximately 2.3%. Figures may not add precisely due to rounding.

Source: Historical 2001 to 2016 population figures from Statistics Canada Table 17-10-0140-01, 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.





## C.2.B Share of Population by Age Cohort, 2001 to 2051

| Cohort | 2001 | 2006 | 2011 | 2016 | 2021 | 2026 | 2031 | 2036 | 2041 | 2046   | 2051   |
|--------|------|------|------|------|------|------|------|------|------|--------|--------|
| 0-19   | 26%  | 23%  | 20%  | 18%  | 18%  | 17%  | 17%  | 17%  | 17%  | 17.2%  | 17.1%  |
| 20-34  | 15%  | 15%  | 14%  | 14%  | 13%  | 13%  | 13%  | 13%  | 14%  | 14.7%  | 15.2%  |
| 35-44  | 16%  | 14%  | 11%  | 10%  | 10%  | 9%   | 9%   | 9%   | 9%   | 9.2%   | 9.9%   |
| 45-54  | 14%  | 16%  | 17%  | 14%  | 11%  | 10%  | 11%  | 11%  | 11%  | 10.9%  | 11.0%  |
| 55-64  | 11%  | 14%  | 16%  | 18%  | 19%  | 17%  | 14%  | 13%  | 13%  | 13.3%  | 13.6%  |
| 65-74  | 10%  | 10%  | 12%  | 15%  | 17%  | 18%  | 19%  | 17%  | 14%  | 13.2%  | 13.5%  |
| 75+    | 8%   | 9%   | 10%  | 11%  | 13%  | 15%  | 17%  | 20%  | 22%  | 21.4%  | 19.8%  |
| Total  | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100.0% | 100.0% |

Note: Population includes net Census undercount estimated at approximately 2.3%. Figures may not add precisely due to rounding.

Source: Historical 2001 to 2016 population figures from Statistics Canada Table 17-10-0140-01, 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



### C.3 Summary of Population and Housing by Structure Type, 2001 to 2051

|            | Year                       | Population<br>(Including<br>Census<br>undercount) <sup>[1]</sup> | Housing Units                 |                                  |                                |       |                     | Persons Per<br>Unit (P.P.U.)<br>with<br>undercount |
|------------|----------------------------|--|-------------------------------|----------------------------------|--------------------------------|-------|---------------------|--|
|            |                            |  | Low<br>Density <sup>[2]</sup> | Medium<br>Density <sup>[3]</sup> | High<br>Density <sup>[4]</sup> | Other | Total<br>Households |  |
| Historical | Mid-2001                   | 80,500   | 24,520                        | 1,290                            | 3,530                          | 390   | 29,720              | 2.71   |
|            | Mid-2006                   | 83,500   | 26,300                        | 1,480                            | 3,390                          | 390   | 31,560              | 2.65   |
|            | Mid-2011                   | 85,000   | 27,680                        | 1,740                            | 3,740                          | 170   | 33,320              | 2.55   |
|            | Mid-2016                   | 87,600   | 29,290                        | 2,090                            | 3,970                          | 350   | 35,690              | 2.45   |
| Forecast   | Mid-2021                   | 90,700   | 30,850                        | 2,250                            | 4,330                          | 350   | 37,780              | 2.40   |
|            | Mid-2026                   | 95,500   | 31,890                        | 3,320                            | 4,830                          | 350   | 40,390              | 2.36   |
|            | Mid-2031                   | 101,000  | 33,000                        | 4,480                            | 5,400                          | 350   | 43,220              | 2.34   |
|            | Mid-2036                   | 106,600  | 34,070                        | 5,430                            | 5,930                          | 350   | 45,780              | 2.33   |
|            | Mid-2041                   | 112,000  | 35,120                        | 6,280                            | 6,470                          | 350   | 48,220              | 2.32   |
|            | Mid-2046                   | 117,000  | 36,100                        | 7,050                            | 7,050                          | 350   | 50,550              | 2.31   |
|            | Mid-2051                   | 122,000  | 37,030                        | 7,820                            | 7,620                          | 350   | 52,820              | 2.31   |
| Growth     | Mid-2001 to Mid-2006       | 3,000  | 1,780                         | 190                              | -140                           | 0     | 1,840               |  |
|            | Mid-2006 to Mid-2011       | 1,500  | 1,380                         | 260                              | 350                            | -220  | 1,760               |  |
|            | Mid-2011 to Mid-2016       | 2,600  | 1,610                         | 350                              | 230                            | 180   | 2,370               |  |
|            | 2001 to 2016               | 7,100  | 4,770                         | 800                              | 440                            | -40   | 5,970               |  |
|            | 2016 to 2031               | 13,400   | 3,710                         | 2,390                            | 1,430                          | 0     | 7,530               |  |
|            | 2016 to 2041               | 24,400   | 5,830                         | 4,190                            | 2,500                          | 0     | 12,530              |  |
|            | 2016 to 2051               | 34,400   | 7,740                         | 5,730                            | 3,650                          | 0     | 17,130              |  |
|            | Annual Growth 2001 to 2016 | 0.6%   | 1.2%                          | 3.3%                             | 0.8%                           | -0.7% | 1.2%                |  |
|            | Annual Growth 2016 to 2031 | 1.0%   | 0.8%                          | 5.2%                             | 2.1%                           | 0.0%  | 1.3%                |  |
|            | Annual Growth 2016 to 2041 | 1.0%   | 0.7%                          | 4.5%                             | 2.0%                           | 0.0%  | 1.2%                |  |
|            | Annual Growth 2016 to 2051 | 1.0%   | 0.7%                          | 3.8%                             | 1.9%                           | 0.0%  | 1.1%                |  |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Source: Historical 2001 to 2016 data derived from Statistics Canada Table 17-10-0140-01. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



C.4 Summary of Total Employment by I.C.I., 2006 to 2051

| Period              | Population Including Undercount | Population Excluding Undercount | Activity Rate |              |            |                                |               |        |                           |                            | Employment |              |            |                                |               |        |                           |   | Employment                     |
|---------------------|---------------------------------|---------------------------------|---------------|--------------|------------|--------------------------------|---------------|--------|---------------------------|----------------------------|------------|--------------|------------|--------------------------------|---------------|--------|---------------------------|---|--------------------------------|
|                     |                                 |                                 | Primary       | Work at Home | Industrial | Commercial/ Population Related | Institutional | Total  | N.F.P.O.W. <sup>[1]</sup> | Total Including N.F.P.O.W. | Primary    | Work at Home | Industrial | Commercial/ Population Related | Institutional | Total  | N.F.P.O.W. <sup>[1]</sup> | Total Employment (Including N.F.P.O.W.) | Total (Excluding Work at Home) |
| Mid 2006            | 83,479                          | 80,995                          | 0.006         | 0.048        | 0.096      | 0.123                          | 0.071         | 0.344  | 0.050                     | 0.393                      | 505        | 3,875        | 7,795      | 9,935                          | 5,725         | 27,835 | 4,020                     | 31,855                                  | 23,960                         |
| Mid 2011            | 84,970                          | 82,125                          | 0.008         | 0.047        | 0.083      | 0.111                          | 0.083         | 0.333  | 0.056                     | 0.389                      | 670        | 3,875        | 6,850      | 9,140                          | 6,845         | 27,380 | 4,560                     | 31,940                                  | 23,505                         |
| Mid 2016            | 87,625                          | 85,598                          | 0.006         | 0.042        | 0.072      | 0.112                          | 0.075         | 0.308  | 0.058                     | 0.366                      | 510        | 3,635        | 6,155      | 9,625                          | 6,440         | 26,365 | 4,965                     | 31,330                                  | 22,730                         |
| Mid 2020            | 90,143                          | 87,520                          | 0.006         | 0.043        | 0.072      | 0.113                          | 0.075         | 0.308  | 0.059                     | 0.367                      | 510        | 3,725        | 6,262      | 9,899                          | 6,565         | 26,961 | 5,178                     | 32,139                                  | 23,236                         |
| Mid 2021            | 90,674                          | 88,594                          | 0.006         | 0.043        | 0.072      | 0.113                          | 0.074         | 0.308  | 0.057                     | 0.365                      | 510        | 3,810        | 6,388      | 10,047                         | 6,554         | 27,309 | 5,060                     | 32,369                                  | 23,499                         |
| Mid 2026            | 95,457                          | 93,267                          | 0.005         | 0.042        | 0.072      | 0.113                          | 0.073         | 0.305  | 0.055                     | 0.360                      | 510        | 3,915        | 6,703      | 10,500                         | 6,800         | 28,428 | 5,165                     | 33,593                                  | 24,513                         |
| Mid 2031            | 101,003                         | 98,686                          | 0.005         | 0.041        | 0.071      | 0.111                          | 0.073         | 0.301  | 0.054                     | 0.355                      | 510        | 4,055        | 6,998      | 10,982                         | 7,169         | 29,714 | 5,286                     | 35,000                                  | 25,659                         |
| Mid 2036            | 106,604                         | 104,159                         | 0.005         | 0.040        | 0.072      | 0.110                          | 0.071         | 0.298  | 0.056                     | 0.354                      | 510        | 4,185        | 7,506      | 11,407                         | 7,420         | 31,028 | 5,840                     | 36,868                                  | 26,843                         |
| Mid 2041            | 111,996                         | 109,427                         | 0.005         | 0.040        | 0.072      | 0.110                          | 0.072         | 0.298  | 0.058                     | 0.356                      | 510        | 4,350        | 7,903      | 12,023                         | 7,860         | 32,646 | 6,354                     | 39,000                                  | 28,296                         |
| Mid 2046            | 116,989                         | 114,306                         | 0.004         | 0.040        | 0.073      | 0.110                          | 0.074         | 0.301  | 0.061                     | 0.363                      | 510        | 4,565        | 8,313      | 12,575                         | 8,480         | 34,443 | 7,014                     | 41,457                                  | 29,878                         |
| Mid 2051            | 122,000                         | 119,202                         | 0.004         | 0.040        | 0.075      | 0.112                          | 0.076         | 0.307  | 0.062                     | 0.369                      | 510        | 4,720        | 8,918      | 13,403                         | 9,059         | 36,610 | 7,390                     | 44,000                                  | 31,890                         |
| Incremental Change  |                                 |                                 |               |              |            |                                |               |        |                           |                            |            |              |            |                                |               |        |                           |   |                                |
| Mid 2001 - Mid 2006 | 2,966                           | 3,460                           | 0.006         | 0.048        | 0.096      | 0.123                          | 0.071         | 0.344  | 0.050                     | 0.393                      | 505        | 110          | 7,795      | 9,935                          | 5,725         | 27,835 | 765                       | 2,620                                   | 23,960                         |
| Mid 2006 - Mid 2011 | 1,491                           | 1,130                           | 0.002         | -0.001       | -0.013     | -0.011                         | 0.013         | -0.010 | 0.006                     | -0.004                     | 165        | 0            | -945       | -795                           | 1,120         | -455   | 540                       | 85                                      | -455                           |
| Mid 2011 - Mid 2016 | 2,655                           | 3,473                           | -0.002        | -0.005       | -0.012     | 0.001                          | -0.008        | -0.025 | 0.002                     | -0.023                     | -160       | -240         | -695       | 485                            | -405          | -1,015 | 405                       | -610                                    | -775                           |
| Mid 2016 - Mid 2021 | 3,049                           | 2,996                           | 0.000         | 0.001        | 0.000      | 0.001                          | -0.001        | 0.000  | -0.001                    | -0.001                     | 0          | 175          | 233        | 422                            | 114           | 944    | 95                        | 1,039                                   | 769                            |
| Mid 2016 - Mid 2026 | 7,832                           | 7,669                           | 0.000         | 0.000        | 0.000      | 0.000                          | -0.002        | -0.003 | 0.001                     | -0.009                     | 0          | 280          | 548        | 875                            | 360           | 2,063  | 200                       | 2,263                                   | 1,783                          |
| Mid 2016 - Mid 2031 | 13,378                          | 13,088                          | -0.001        | -0.001       | -0.001     | -0.001                         | -0.003        | -0.007 | -0.004                    | -0.011                     | 0          | 420          | 843        | 1,357                          | 729           | 3,349  | 321                       | 3,670                                   | 2,929                          |
| Mid 2016 - Mid 2036 | 18,979                          | 18,561                          | -0.001        | -0.002       | 0.000      | -0.003                         | -0.004        | -0.010 | -0.002                    | -0.012                     | 0          | 550          | 1,351      | 1,782                          | 980           | 4,663  | 875                       | 5,538                                   | 4,113                          |
| Mid 2016 - Mid 2041 | 24,371                          | 23,829                          | -0.001        | -0.003       | 0.000      | -0.003                         | -0.003        | -0.010 | 0.000                     | -0.010                     | 0          | 715          | 1,748      | 2,398                          | 1,420         | 6,281  | 1,389                     | 7,670                                   | 5,566                          |
| Mid 2016 - Mid 2046 | 29,364                          | 28,708                          | -0.001        | -0.003       | 0.001      | -0.002                         | -0.001        | -0.007 | 0.003                     | -0.003                     | 0          | 930          | 2,158      | 2,950                          | 2,040         | 8,078  | 2,049                     | 10,127                                  | 7,148                          |
| Mid 2016 - Mid 2051 | 34,375                          | 33,604                          | -0.002        | -0.003       | 0.003      | 0.000                          | 0.001         | -0.001 | 0.004                     | 0.003                      | 0          | 1,085        | 2,763      | 3,778                          | 2,619         | 10,245 | 2,425                     | 12,670                                  | 9,160                          |
| Annual Average      |                                 |                                 |               |              |            |                                |               |        |                           |                            |            |              |            |                                |               |        |                           |   |                                |
| Mid 2006 - Mid 2011 | 298                             | 226                             | 0.000         | 0.000        | -0.003     | -0.002                         | 0.003         | -0.002 | 0.001                     | -0.001                     | 33         | 0            | -189       | -159                           | 224           | -91    | 108                       | 17                                      | -91                            |
| Mid 2011 - Mid 2016 | 531                             | 695                             | 0.000         | -0.001       | -0.002     | 0.000                          | -0.002        | -0.005 | 0.000                     | -0.005                     | -32        | -48          | -139       | 97                             | -81           | -203   | 81                        | -122                                    | -155                           |
| Mid 2016 - Mid 2021 | 610                             | 599                             | 0.000         | 0.000        | 0.000      | 0.000                          | 0.000         | 0.000  | 0.000                     | 0.000                      | 0          | 35           | 47         | 84                             | 23            | 189    | 19                        | 208                                     | 154                            |
| Mid 2016 - Mid 2026 | 783                             | 767                             | 0.000         | 0.000        | 0.000      | 0.000                          | 0.000         | 0.000  | 0.000                     | -0.001                     | 0          | 28           | 55         | 88                             | 36            | 206    | 20                        | 226                                     | 178                            |
| Mid 2016 - Mid 2031 | 892                             | 873                             | 0.000         | 0.000        | 0.000      | 0.000                          | 0.000         | 0.000  | 0.000                     | -0.001                     | 0          | 28           | 56         | 90                             | 49            | 223    | 21                        | 245                                     | 195                            |
| Mid 2016 - Mid 2036 | 949                             | 928                             | 0.000         | 0.000        | 0.000      | 0.000                          | 0.000         | -0.001 | 0.000                     | 0.000                      | 0          | 28           | 68         | 89                             | 49            | 233    | 44                        | 277                                     | 206                            |
| Mid 2016 - Mid 2041 | 975                             | 953                             | 0.000         | 0.000        | 0.000      | 0.000                          | 0.000         | 0.000  | 0.000                     | 0.000                      | 0          | 29           | 70         | 96                             | 57            | 251    | 56                        | 307                                     | 223                            |
| Mid 2016 - Mid 2046 | 979                             | 957                             | 0.000         | 0.000        | 0.000      | 0.000                          | 0.000         | 0.000  | 0.000                     | 0.000                      | 0          | 31           | 72         | 98                             | 68            | 269    | 68                        | 338                                     | 186                            |
| Mid 2016 - Mid 2051 | 982                             | 960                             | 0.000         | 0.000        | 0.000      | 0.000                          | 0.000         | 0.000  | 0.000                     | 0.000                      | 0          | 31           | 79         | 108                            | 75            | 293    | 69                        | 362                                     | 262                            |

<sup>[1]</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Source: Historical 2006 to 2016 figures from Statistics Canada Place of Work data. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



C.5 Intensification Comparison by Area Municipality and Planning Policy Area

| Development Area            | Intensification Target | Policy Area                | Historical Building Permit |           |           |                |                                      |           |           | Residential Supply Information |                |             |       |                     |                           | Residential Forecast |       |                |
|-----------------------------|------------------------|----------------------------|----------------------------|-----------|-----------|----------------|--------------------------------------|-----------|-----------|--------------------------------|----------------|-------------|-------|---------------------|---------------------------|----------------------|-------|----------------|
|                             |                        |                            | Total                      |           |           | Annual Housing | Building Permit Share by Policy Area |           |           | Total Units                    |                |             |       |                     | Unit Share by Policy Area |                      |       |                |
|                             |                        |                            | 2011-2015                  | 2016-2019 | 2011-2019 | 2011-2019      | 2011-2015                            | 2016-2019 | 2011-2019 | Registered                     | Draft Approved | Vacant Land | Total | Updated Total Units |                           | 2022-2051            | Share | Annual Housing |
| Town of Cobourg             | 39%                    | Built-up Area              | 263                        | 24        | 287       | 32             | 50%                                  | 6%        | 30%       |                                |                | 113         | 113   | 3,216               | 85%                       | 1,100                | 21%   | 38             |
|                             |                        | Designated Greenfield Area | 268                        | 399       | 667       | 74             | 50%                                  | 94%       | 70%       |                                | 552            |             | 552   | 552                 | 15%                       | 4,170                | 79%   | 144            |
|                             |                        | Urban                      | 531                        | 423       | 954       | 106            | 100%                                 | 100%      | 100%      | 0                              | 552            | 113         | 665   | 3,768               |                           | 5,270                |       | 182            |
|                             |                        | Rural                      |                            | 0         | 0         | 0              | 0%                                   | 0%        | 0%        |                                |                |             | 0     | 0                   |                           |                      |       | 0              |
|                             |                        | Total                      | 531                        | 423       | 954       | 106            | 100%                                 | 100%      | 100%      | 0                              | 552            | 113         | 665   | 3,768               |                           | 5,280                |       | 182            |
| Municipality of Port Hope   | 50%                    | Built-up Area              | 195                        | 138       | 333       | 37             | 50%                                  | 77%       | 59%       |                                | 21             | 15          | 36    | 1,559               | 74%                       | 860                  | 22%   | 30             |
|                             |                        | Designated Greenfield Area | 194                        | 41        | 235       | 26             | 50%                                  | 23%       | 41%       | 166                            |                | 372         | 538   | 538                 | 26%                       | 3,070                | 78%   | 106            |
|                             |                        | Urban                      | 389                        | 179       | 568       | 63             | 85%                                  | 75%       | 45%       | 166                            | 21             | 387         | 574   | 2,097               |                           | 3,930                |       | 136            |
|                             |                        | Rural                      | 71                         | 60        | 131       | 15             | 15%                                  | 25%       | 10%       |                                | 33             | 20          | 53    | 53                  |                           | 220                  |       | 8              |
|                             |                        | Total                      | 460                        | 239       | 1,267     | 141            | 100%                                 | 100%      | 100%      | 166                            | 54             | 407         | 627   | 2,150               |                           | 4,150                |       | 143            |
| Campbellford                | 31%                    | Built-up Area              |                            | 23        | 23        | 3              |                                      | 79%       | 79%       |                                |                |             |       | 260                 | 30%                       | 120                  | 19%   | 4              |
|                             |                        | Designated Greenfield Area |                            | 6         | 6         | 1              |                                      | 21%       | 21%       | 151                            | 197            | 247         | 595   | 595                 | 70%                       | 510                  | 81%   | 18             |
|                             |                        | Urban                      | 0                          | 29        | 29        | 3              |                                      | 100%      | 50%       | 151                            | 197            | 247         | 595   | 855                 |                           | 630                  |       | 22             |
|                             |                        | Rural                      |                            |           | 0         | 0              |                                      | 0%        | 0%        |                                |                |             | 0     | 0                   |                           | 0                    |       | 0              |
|                             |                        | Total                      | 0                          | 29        | 58        | 6              |                                      | 100%      | 100%      | 151                            | 197            | 247         | 595   | 855                 |                           | 630                  |       | 22             |
| Hastings                    | 31%                    | Built-up Area              |                            | 10        | 10        | 1              |                                      | 14%       | 14%       |                                |                |             |       | 308                 | 70%                       | 100                  | 17%   | 3              |
|                             |                        | Designated Greenfield Area |                            | 60        | 60        | 7              |                                      | 86%       | 86%       |                                | 133            |             | 133   | 133                 | 30%                       | 480                  | 83%   | 17             |
|                             |                        | Urban                      | 0                          | 70        | 70        | 8              |                                      | 100%      | 100%      | 0                              | 133            | 0           | 133   | 441                 |                           | 580                  |       | 20             |
|                             |                        | Rural                      |                            |           | 0         | 0              |                                      | 0%        | 0%        |                                |                |             | 0     | 0                   |                           | 0                    |       | 0              |
|                             |                        | Total                      | 0                          | 70        | 70        | 8              |                                      | 100%      | 100%      | 0                              | 133            | 0           | 133   | 441                 |                           | 580                  |       | 20             |
| Municipality of Trent Hills |                        | Built-up Area              | 20                         | 33        | 53        | 6              | 49%                                  | 33%       | 38%       | 0                              | 0              | 0           | 0     | 568                 | 44%                       | 220                  | 18%   | 8              |
|                             |                        | Designated Greenfield Area | 21                         | 67        | 88        | 10             | 51%                                  | 67%       | 62%       | 151                            | 330            | 247         | 728   | 728                 | 56%                       | 1,020                | 82%   | 35             |
|                             |                        | Urban                      | 41                         | 100       | 141       | 16             | 20%                                  | 34%       | 22%       | 151                            | 330            | 247         | 728   | 1,296               |                           | 1,240                |       | 43             |
|                             |                        | Rural                      | 167                        | 193       | 360       | 40             | 80%                                  | 66%       | 56%       |                                | 96             |             | 96    | 192                 |                           | 130                  |       | 4              |
|                             |                        | Total                      | 208                        | 293       | 642       | 71             | 100%                                 | 100%      | 100%      | 151                            | 426            | 247         | 824   | 1,488               |                           | 1,370                |       | 47             |
| Municipality of Brighton    | 42%                    | Built-up Area              | 91                         | 132       | 223       | 25             | 37%                                  | 47%       | 42%       | 14                             | 8              |             | 22    | 1,097               | 65%                       | 280                  | 17%   | 10             |
|                             |                        | Designated Greenfield Area | 155                        | 150       | 305       | 34             | 63%                                  | 53%       | 58%       | 138                            | 131            | 328         | 597   | 597                 | 35%                       | 1,390                | 83%   | 48             |
|                             |                        | Urban                      | 246                        | 282       | 528       | 59             | 77%                                  | 77%       | 44%       | 152                            | 139            | 328         | 619   | 1,694               |                           | 1,670                |       | 58             |
|                             |                        | Rural                      | 74                         | 83        | 157       | 17             | 23%                                  | 23%       | 13%       |                                | 11             |             | 11    | 11                  |                           | 150                  |       | 5              |
|                             |                        | Total                      | 320                        | 365       | 1,213     | 135            | 100%                                 | 100%      | 100%      | 152                            | 150            | 328         | 630   | 1,705               |                           | 1,820                |       | 63             |
| Colborne                    | 31%                    | Built-up Area              | 24                         | 25        | 49        | 5              | 50%                                  | 58%       | 54%       |                                |                |             | 0     | 154                 | 34%                       | 70                   | 13%   | 2              |
|                             |                        | Designated Greenfield Area | 24                         | 18        | 42        | 5              | 50%                                  | 42%       | 46%       | 102                            |                | 202         | 304   | 304                 | 66%                       | 490                  | 88%   | 17             |
|                             |                        | Urban                      | 48                         | 43        | 91        | 10             | 42%                                  | 37%       | 29%       | 102                            | 0              | 202         | 304   | 458                 |                           | 560                  |       | 19             |
|                             |                        | Rural                      | 65                         | 72        | 137       | 15             | 58%                                  | 63%       | 43%       |                                |                |             | 0     | 0                   |                           | 110                  |       | 4              |
|                             |                        | Total                      | 113                        | 115       | 319       | 35             | 100%                                 | 100%      | 100%      | 102                            | 0              | 202         | 304   | 458                 |                           | 670                  |       | 23             |
| Northumberland County       | 40%                    | Built-up Area              | 593                        | 352       | 945       | 105            | 47%                                  | 34%       | 41%       | 14                             | 29             | 128         | 171   | 6,594               | 71%                       | 2,530                | 20%   | 87             |
|                             |                        | Designated Greenfield Area | 662                        | 675       | 1,337     | 149            | 53%                                  | 66%       | 34%       | 557                            | 1,013          | 1,149       | 2,719 | 2,719               | 29%                       | 10,140               | 80%   | 350            |
|                             |                        | Urban                      | 1,255                      | 1,027     | 2,282     | 254            | 65%                                  | 61%       | 39%       | 571                            | 1,042          | 1,277       | 2,890 | 9,313               |                           | 12,670               |       | 437            |
|                             |                        | Rural                      | 677                        | 665       | 3,619     | 402            | 35%                                  | 39%       | 61%       | 131                            | 250            | 20          | 160   | 256                 |                           | 1,970                |       | 68             |
|                             |                        | Total                      | 1,932                      | 1,692     | 5,901     | 656            | 100%                                 | 100%      | 100%      | 702                            | 1,292          | 1,297       | 3,050 | 9,569               |                           | 14,650               |       | 505            |

Note: Numbers may not add due to rounding.  
Source: Intensification targets identified for each urban area from Northumberland County Official Plan, Table I: Minimum Intensification Target in Planning Period. Historical building permits and residential supply data from local municipalities within Northumberland County. Residential forecast prepared by Watson & Associates Economists Ltd., 2021.



# Appendix D:

## Population and Housing and Forecast by Area Municipality and Planning Policy Area



# Appendix D: Population and Housing Forecast by Area Municipality and Planning Policy Area

## D.1 Town of Cobourg

### D.1.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |        | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|--------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total  |                           |
| 2016               | 19,400                                     | 19,900                                     | 5,510                      | 1,165                         | 1,970                       | 8,645  | 2.24                      |
| 2021               | 20,300                                     | 20,800                                     | 5,710                      | 1,265                         | 2,305                       | 9,280  | 2.19                      |
| 2031               | 23,900                                     | 24,500                                     | 6,155                      | 2,230                         | 2,730                       | 11,115 | 2.15                      |
| 2041               | 28,200                                     | 28,800                                     | 6,670                      | 3,135                         | 3,300                       | 13,105 | 2.15                      |
| 2051               | 31,300                                     | 32,100                                     | 6,880                      | 3,810                         | 3,990                       | 14,680 | 2.13                      |
| <b>Incremental</b> |  |  |                            |                               |                             |        |                           |
| 2016 to 2021       | 900  | 900  | 200                        | 100                           | 335                         | 635    |                           |
| 2016 to 2031       | 4,500                                      | 4,600                                      | 645                        | 1,065                         | 760                         | 2,470  |                           |
| 2016 to 2041       | 8,800                                      | 8,900                                      | 1,160                      | 1,970                         | 1,330                       | 4,460  |                           |
| 2016 to 2051       | 11,900                                     | 12,200                                     | 1,370                      | 2,645                         | 2,020                       | 6,035  |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



### D.1.B Summary of Population and Housing by B.U.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 17,300                                     | 17,700                                     | 4,930                      | 945                           | 1,860                       | 7,730 | 2.24                      |
| 2021               | 17,000                                     | 17,400                                     | 4,950                      | 945                           | 1,865                       | 7,755 | 2.19                      |
| 2031               | 17,700                                     | 18,100                                     | 5,050                      | 1,120                         | 1,980                       | 8,150 | 2.17                      |
| 2041               | 18,700                                     | 19,100                                     | 5,105                      | 1,355                         | 2,110                       | 8,570 | 2.18                      |
| 2051               | 19,400                                     | 19,800                                     | 5,120                      | 1,500                         | 2,245                       | 8,865 | 2.19                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | -300                                       | -300                                       | 20                         | 0                             | 5                           | 25    |                           |
| 2016 to 2031       | 400  | 400  | 120                        | 175                           | 120                         | 420   |                           |
| 2016 to 2041       | 1,400                                      | 1,400                                      | 175                        | 410                           | 250                         | 840   |                           |
| 2016 to 2051       | 2,100                                      | 2,100                                      | 190                        | 555                           | 385                         | 1,135 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

### D.1.C Summary of Population and Housing by D.G.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 2,100                                      | 2,200                                      | 580                        | 220                           | 110                         | 915   | 2.30                      |
| 2021               | 3,300                                      | 3,400                                      | 760                        | 320                           | 440                         | 1,525 | 2.16                      |
| 2031               | 6,200                                      | 6,400                                      | 1,105                      | 1,115                         | 750                         | 2,965 | 2.09                      |
| 2041               | 9,500                                      | 9,700                                      | 1,565                      | 1,780                         | 1,185                       | 4,530 | 2.10                      |
| 2051               | 12,000                                     | 12,200                                     | 1,760                      | 2,310                         | 1,745                       | 5,820 | 2.06                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 1,200                                      | 1,200                                      | 180                        | 100                           | 330                         | 610   |                           |
| 2016 to 2031       | 4,100                                      | 4,200                                      | 525                        | 895                           | 640                         | 2,050 |                           |
| 2016 to 2041       | 7,400                                      | 7,500                                      | 985                        | 1,560                         | 1,075                       | 3,615 |                           |
| 2016 to 2051       | 9,900                                      | 10,000                                     | 1,180                      | 2,090                         | 1,635                       | 4,905 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



## D.2 Municipality of Port Hope

### D.2.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |        | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|--------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total  |                           |
| 2016               | 16,800                                     | 17,100                                     | 5,480                      | 490                           | 1,105                       | 7,075  | 2.37                      |
| 2021               | 17,100                                     | 17,500                                     | 5,705                      | 525                           | 1,130                       | 7,360  | 2.32                      |
| 2031               | 20,600                                     | 21,000                                     | 6,330                      | 1,300                         | 1,575                       | 9,205  | 2.24                      |
| 2041               | 23,600                                     | 24,200                                     | 6,880                      | 1,865                         | 1,950                       | 10,695 | 2.21                      |
| 2051               | 25,300                                     | 25,900                                     | 7,115                      | 2,230                         | 2,225                       | 11,570 | 2.19                      |
| <b>Incremental</b> |  |  |                            |                               |                             |        |                           |
| 2016 to 2021       | 300  | 400  | 225                        | 35                            | 25                          | 285    |                           |
| 2016 to 2031       | 3,800                                      | 3,900                                      | 850                        | 810                           | 470                         | 2,130  |                           |
| 2016 to 2041       | 6,800                                      | 7,100                                      | 1,400                      | 1,375                         | 845                         | 3,620  |                           |
| 2016 to 2051       | 8,500                                      | 8,800                                      | 1,635                      | 1,740                         | 1,120                       | 4,495  |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

### D.2.B Summary of Population and Housing by B.U.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 11,800                                     | 12,000                                     | 3,785                      | 425                           | 1,035                       | 5,245 | 2.25                      |
| 2021               | 11,900                                     | 12,100                                     | 3,890                      | 460                           | 1,060                       | 5,415 | 2.20                      |
| 2031               | 12,500                                     | 12,800                                     | 3,935                      | 750                           | 1,225                       | 5,905 | 2.12                      |
| 2041               | 12,800                                     | 13,100                                     | 3,945                      | 850                           | 1,280                       | 6,080 | 2.11                      |
| 2051               | 13,200                                     | 13,500                                     | 3,945                      | 975                           | 1,390                       | 6,310 | 2.09                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 100  | 100  | 105                        | 35                            | 25                          | 170   |                           |
| 2016 to 2031       | 700  | 800  | 150                        | 325                           | 190                         | 660   |                           |
| 2016 to 2041       | 1,000                                      | 1,100                                      | 160                        | 425                           | 245                         | 835   |                           |
| 2016 to 2051       | 1,400                                      | 1,500                                      | 160                        | 550                           | 355                         | 1,065 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.





## D.2.C Summary of Population and Housing by D.G.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 900  | 1,000                                      | 300                        | 65                            | 70                          | 435   | 2.07                      |
| 2021               | 1,000                                      | 1,100                                      | 345                        | 65                            | 70                          | 480   | 2.08                      |
| 2031               | 3,600                                      | 3,700                                      | 800                        | 550                           | 350                         | 1,700 | 2.12                      |
| 2041               | 6,200                                      | 6,300                                      | 1,230                      | 1,015                         | 670                         | 2,915 | 2.13                      |
| 2051               | 7,500                                      | 7,700                                      | 1,460                      | 1,255                         | 840                         | 3,555 | 2.11                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 100  | 100  | 45                         | 0                             | 0                           | 45    |                           |
| 2016 to 2031       | 2,700                                      | 2,700                                      | 500                        | 485                           | 280                         | 1,265 |                           |
| 2016 to 2041       | 5,300                                      | 5,300                                      | 930                        | 950                           | 600                         | 2,480 |                           |
| 2016 to 2051       | 6,600                                      | 6,700                                      | 1,160                      | 1,190                         | 770                         | 3,120 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

## D.2.D Summary of Population and Housing by Rural Area

| Year               | Population                               |  | Households               |                             |                           |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|--------------------------|-----------------------------|---------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>1</sup> | Including Census Undercount <sup>1</sup> | Low Density <sup>2</sup> | Medium Density <sup>3</sup> | High Density <sup>4</sup> | Total |                           |
| 2016               | 4,100                                    | 4,200                                    | 1,395                    | 0                           | 0                         | 1,395 | 2.94                      |
| 2021               | 4,200                                    | 4,200                                    | 1,470                    | 0                           | 0                         | 1,470 | 2.86                      |
| 2031               | 4,400                                    | 4,500                                    | 1,600                    | 0                           | 0                         | 1,600 | 2.75                      |
| 2041               | 4,600                                    | 4,800                                    | 1,705                    | 0                           | 0                         | 1,705 | 2.70                      |
| 2051               | 4,600                                    | 4,700                                    | 1,705                    | 0                           | 0                         | 1,705 | 2.70                      |
| <b>Incremental</b> |  |  |                          |                             |                           |       |                           |
| 2016 to 2021       | 100                                      | 0  | 75                       | 0                           | 0                         | 75    |                           |
| 2016 to 2031       | 300                                      | 300                                      | 205                      | 0                           | 0                         | 205   |                           |
| 2016 to 2041       | 500                                      | 600                                      | 310                      | 0                           | 0                         | 310   |                           |
| 2016 to 2051       | 500                                      | 500                                      | 310                      | 0                           | 0                         | 310   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



## D.3 Municipality of Trent Hills

### D.3.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 12,900                                     | 13,200                                     | 4,945                      | 195                           | 365                         | 5,505 | 2.34                      |
| 2021               | 13,400                                     | 13,700                                     | 5,235                      | 205                           | 365                         | 5,805 | 2.31                      |
| 2031               | 14,000                                     | 14,400                                     | 5,425                      | 380                           | 435                         | 6,240 | 2.24                      |
| 2041               | 14,800                                     | 15,200                                     | 5,580                      | 545                           | 510                         | 6,635 | 2.23                      |
| 2051               | 16,200                                     | 16,600                                     | 6,030                      | 660                           | 550                         | 7,240 | 2.24                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 500  | 500  | 290                        | 10                            | 0                           | 300   |                           |
| 2016 to 2031       | 1,100                                      | 1,200                                      | 480                        | 185                           | 70                          | 735   |                           |
| 2016 to 2041       | 1,900                                      | 2,000                                      | 635                        | 350                           | 145                         | 1,130 |                           |
| 2016 to 2051       | 3,300                                      | 3,400                                      | 1,085                      | 465                           | 185                         | 1,735 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

### D.3.B Summary of Population and Housing by B.U.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 4,500                                      | 4,600                                      | 1,515                      | 195                           | 320                         | 2,030 | 2.22                      |
| 2021               | 4,500                                      | 4,600                                      | 1,550                      | 200                           | 320                         | 2,075 | 2.17                      |
| 2031               | 4,500                                      | 4,600                                      | 1,570                      | 205                           | 350                         | 2,125 | 2.12                      |
| 2041               | 4,600                                      | 4,700                                      | 1,585                      | 245                           | 375                         | 2,210 | 2.08                      |
| 2051               | 4,800                                      | 4,900                                      | 1,645                      | 275                           | 380                         | 2,300 | 2.09                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 0  | 0  | 35                         | 5                             | 0                           | 45    |                           |
| 2016 to 2031       | 0  | 0  | 55                         | 10                            | 30                          | 95    |                           |
| 2016 to 2041       | 100  | 100  | 70                         | 50                            | 55                          | 180   |                           |
| 2016 to 2051       | 300  | 300  | 130                        | 80                            | 60                          | 270   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



### D.3.C Summary of Population and Housing by D.G.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 100  | 100  | 55                         | 0                             | 45                          | 100   | 1.00                      |
| 2021               | 300  | 300  | 120                        | 0                             | 45                          | 165   | 1.82                      |
| 2031               | 1,000                                      | 1,000                                      | 240                        | 175                           | 85                          | 505   | 1.98                      |
| 2041               | 1,600                                      | 1,700                                      | 365                        | 300                           | 130                         | 795   | 2.01                      |
| 2051               | 2,600                                      | 2,700                                      | 650                        | 385                           | 170                         | 1,205 | 2.16                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 200  | 200  | 65                         | 0                             | 0                           | 65    |                           |
| 2016 to 2031       | 900  | 900  | 185                        | 175                           | 40                          | 405   |                           |
| 2016 to 2041       | 1,500                                      | 1,600                                      | 310                        | 300                           | 85                          | 695   |                           |
| 2016 to 2051       | 2,500                                      | 2,600                                      | 595                        | 385                           | 125                         | 1,105 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

### D.3.D Summary of Population and Housing by Rural Area

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 8,300                                      | 8,500                                      | 3,375                      | 0                             | 0                           | 3,375 | 2.46                      |
| 2021               | 8,600                                      | 8,800                                      | 3,560                      | 0                             | 0                           | 3,560 | 2.42                      |
| 2031               | 8,600                                      | 8,800                                      | 3,615                      | 0                             | 0                           | 3,615 | 2.38                      |
| 2041               | 8,600                                      | 8,800                                      | 3,630                      | 0                             | 0                           | 3,630 | 2.37                      |
| 2051               | 8,800                                      | 9,000                                      | 3,735                      | 0                             | 0                           | 3,735 | 2.36                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 300  | 300  | 185                        | 0                             | 0                           | 185   |                           |
| 2016 to 2031       | 300  | 300  | 240                        | 0                             | 0                           | 240   |                           |
| 2016 to 2041       | 300  | 300  | 255                        | 0                             | 0                           | 255   |                           |
| 2016 to 2051       | 500  | 500  | 360                        | 0                             | 0                           | 360   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



## D.4 Municipality of Brighton

### D.4.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 11,800                                     | 12,100                                     | 4,330                      | 205                           | 245                         | 4,780 | 2.47                      |
| 2021               | 12,600                                     | 12,900                                     | 4,715                      | 225                           | 245                         | 5,185 | 2.43                      |
| 2031               | 13,400                                     | 13,700                                     | 4,860                      | 475                           | 355                         | 5,690 | 2.36                      |
| 2041               | 14,600                                     | 14,900                                     | 5,195                      | 610                           | 410                         | 6,215 | 2.35                      |
| 2051               | 16,500                                     | 16,900                                     | 5,645                      | 920                           | 520                         | 7,085 | 2.33                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 800  | 800  | 385                        | 20                            | 0                           | 405   |                           |
| 2016 to 2031       | 1,600                                      | 1,600                                      | 530                        | 270                           | 110                         | 910   |                           |
| 2016 to 2041       | 2,800                                      | 2,800                                      | 865                        | 405                           | 165                         | 1,435 |                           |
| 2016 to 2051       | 4,700                                      | 4,800                                      | 1,315                      | 715                           | 275                         | 2,305 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

### D.4.B Summary of Population and Housing by B.U.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 5,600                                      | 5,800                                      | 2,310                      | 120                           | 245                         | 2,675 | 2.09                      |
| 2021               | 5,900                                      | 6,000                                      | 2,450                      | 125                           | 245                         | 2,815 | 2.10                      |
| 2031               | 5,800                                      | 5,900                                      | 2,395                      | 190                           | 275                         | 2,855 | 2.03                      |
| 2041               | 6,000                                      | 6,100                                      | 2,440                      | 210                           | 295                         | 2,945 | 2.04                      |
| 2051               | 6,300                                      | 6,500                                      | 2,510                      | 295                           | 320                         | 3,120 | 2.02                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 300  | 200  | 140                        | 5                             | 0                           | 140   |                           |
| 2016 to 2031       | 200  | 100  | 85                         | 70                            | 30                          | 180   |                           |
| 2016 to 2041       | 400  | 300  | 130                        | 90                            | 50                          | 270   |                           |
| 2016 to 2051       | 700  | 700  | 200                        | 175                           | 75                          | 445   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



#### D.4.C Summary of Population and Housing by D.G.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 1,000                                      | 1,000                                      | 355                        | 85                            | 0                           | 440   | 2.27                      |
| 2021               | 1,400                                      | 1,500                                      | 510                        | 105                           | 0                           | 610   | 2.30                      |
| 2031               | 2,300                                      | 2,400                                      | 675                        | 290                           | 80                          | 1,045 | 2.20                      |
| 2041               | 3,200                                      | 3,200                                      | 890                        | 395                           | 115                         | 1,405 | 2.28                      |
| 2051               | 4,600                                      | 4,700                                      | 1,210                      | 625                           | 200                         | 2,040 | 2.25                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 400  | 500  | 155                        | 20                            | 0                           | 170   |                           |
| 2016 to 2031       | 1,300                                      | 1,400                                      | 320                        | 205                           | 80                          | 605   |                           |
| 2016 to 2041       | 2,200                                      | 2,200                                      | 535                        | 310                           | 115                         | 965   |                           |
| 2016 to 2051       | 3,600                                      | 3,700                                      | 855                        | 540                           | 200                         | 1,600 |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

#### D.4.D Summary of Population and Housing by Rural Area

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 5,200                                      | 5,300                                      | 1,665                      | 0                             | 0                           | 1,665 | 3.12                      |
| 2021               | 5,300                                      | 5,400                                      | 1,760                      | 0                             | 0                           | 1,760 | 3.01                      |
| 2031               | 5,300                                      | 5,400                                      | 1,790                      | 0                             | 0                           | 1,790 | 2.96                      |
| 2041               | 5,400                                      | 5,600                                      | 1,860                      | 0                             | 0                           | 1,860 | 2.90                      |
| 2051               | 5,600                                      | 5,700                                      | 1,925                      | 0                             | 0                           | 1,925 | 2.91                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 100  | 100  | 95                         | 0                             | 0                           | 95    |                           |
| 2016 to 2031       | 100  | 100  | 125                        | 0                             | 0                           | 125   |                           |
| 2016 to 2041       | 200  | 300  | 195                        | 0                             | 0                           | 195   |                           |
| 2016 to 2051       | 400  | 400  | 260                        | 0                             | 0                           | 260   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



## D.5 Township of Hamilton

### D.5.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2006               | 11,000                                     | 11,300                                     | 3,925                      | 30                            | 35                          | 3,990 | 2.76                      |
| 2011               | 10,700                                     | 11,000                                     | 3,880                      | 20                            | 35                          | 3,935 | 2.72                      |
| 2016               | 10,900                                     | 11,200                                     | 4,175                      | 40                            | 50                          | 4,265 | 2.56                      |
| 2021               | 10,900                                     | 11,200                                     | 4,280                      | 40                            | 50                          | 4,370 | 2.49                      |
| 2031               | 11,800                                     | 12,100                                     | 4,715                      | 40                            | 50                          | 4,805 | 2.46                      |
| 2041               | 12,600                                     | 12,900                                     | 5,045                      | 40                            | 50                          | 5,135 | 2.45                      |
| 2051               | 12,900                                     | 13,200                                     | 5,140                      | 40                            | 50                          | 5,230 | 2.47                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 0  | 0  | 105                        | 0                             | 0                           | 105   |                           |
| 2016 to 2031       | 900  | 900  | 540                        | 0                             | 0                           | 540   |                           |
| 2016 to 2041       | 1,700                                      | 1,700                                      | 870                        | 0                             | 0                           | 870   |                           |
| 2016 to 2051       | 2,000                                      | 2,000                                      | 965                        | 0                             | 0                           | 965   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



## D.6 Township of Alnwick/Haldimand

### D.6.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 6,900                                      | 7,000                                      | 2,590                      | 5                             | 30                          | 2,625 | 2.63                      |
| 2021               | 7,300                                      | 7,400                                      | 2,810                      | 5                             | 30                          | 2,845 | 2.57                      |
| 2031               | 7,600                                      | 7,800                                      | 3,010                      | 5                             | 30                          | 3,045 | 2.50                      |
| 2041               | 8,000                                      | 8,100                                      | 3,145                      | 5                             | 30                          | 3,180 | 2.52                      |
| 2051               | 8,500                                      | 8,700                                      | 3,365                      | 5                             | 30                          | 3,400 | 2.50                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 400  | 400  | 220                        | 0                             | 0                           | 220   |                           |
| 2016 to 2031       | 700  | 800  | 420                        | 0                             | 0                           | 420   |                           |
| 2016 to 2041       | 1,100                                      | 1,100                                      | 555                        | 0                             | 0                           | 555   |                           |
| 2016 to 2051       | 1,600                                      | 1,700                                      | 775                        | 0                             | 0                           | 775   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



## D.7 Township of Cramahe

### D.7.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 6,400                                      | 6,500                                      | 2,350                      | 35                            | 180                         | 2,565 | 2.50                      |
| 2021               | 6,500                                      | 6,700                                      | 2,475                      | 35                            | 180                         | 2,690 | 2.42                      |
| 2031               | 6,800                                      | 7,000                                      | 2,585                      | 100                           | 195                         | 2,880 | 2.36                      |
| 2041               | 7,200                                      | 7,300                                      | 2,700                      | 135                           | 205                         | 3,040 | 2.37                      |
| 2051               | 8,000                                      | 8,200                                      | 2,945                      | 205                           | 235                         | 3,385 | 2.36                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 100  | 200  | 125                        | 0                             | 0                           | 125   |                           |
| 2016 to 2031       | 400  | 500  | 235                        | 65                            | 15                          | 315   |                           |
| 2016 to 2041       | 800  | 800  | 350                        | 100                           | 25                          | 475   |                           |
| 2016 to 2051       | 1,600                                      | 1,700                                      | 595                        | 170                           | 55                          | 820   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

### D.7.B Summary of Population and Housing by B.U.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 2,100                                      | 2,200                                      | 745                        | 25                            | 170                         | 935   | 2.25                      |
| 2021               | 2,100                                      | 2,200                                      | 770                        | 25                            | 170                         | 965   | 2.18                      |
| 2031               | 2,100                                      | 2,200                                      | 760                        | 45                            | 175                         | 975   | 2.15                      |
| 2041               | 2,200                                      | 2,200                                      | 765                        | 55                            | 180                         | 1,000 | 2.20                      |
| 2051               | 2,200                                      | 2,300                                      | 780                        | 75                            | 185                         | 1,045 | 2.11                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 0  | 0  | 25                         | 0                             | 0                           | 30    |                           |
| 2016 to 2031       | 0  | 0  | 15                         | 20                            | 5                           | 40    |                           |
| 2016 to 2041       | 100  | 0  | 20                         | 30                            | 10                          | 65    |                           |
| 2016 to 2051       | 100  | 100  | 35                         | 50                            | 15                          | 110   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.





#### D.7.C Summary of Population and Housing by D.G.A.

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 200  | 200  | 50                         | 10                            | 10                          | 70    | 2.86                      |
| 2021               | 200  | 200  | 65                         | 10                            | 10                          | 90    | 2.22                      |
| 2031               | 600  | 600  | 185                        | 55                            | 20                          | 265   | 2.26                      |
| 2041               | 800  | 900  | 255                        | 80                            | 25                          | 360   | 2.22                      |
| 2051               | 1,400                                      | 1,400                                      | 400                        | 130                           | 50                          | 580   | 2.41                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 0  | 0  | 15                         | 0                             | 0                           | 20    |                           |
| 2016 to 2031       | 400  | 400  | 135                        | 45                            | 10                          | 195   |                           |
| 2016 to 2041       | 600  | 700  | 205                        | 70                            | 15                          | 290   |                           |
| 2016 to 2051       | 1,200                                      | 1,200                                      | 350                        | 120                           | 40                          | 510   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.

#### D.4.D Summary of Population and Housing by Rural Area

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 4,100                                      | 4,200                                      | 1,560                      | 0                             | 0                           | 1,560 | 2.63                      |
| 2021               | 4,200                                      | 4,300                                      | 1,635                      | 0                             | 0                           | 1,635 | 2.57                      |
| 2031               | 4,100                                      | 4,200                                      | 1,645                      | 0                             | 0                           | 1,645 | 2.49                      |
| 2041               | 4,200                                      | 4,300                                      | 1,680                      | 0                             | 0                           | 1,680 | 2.50                      |
| 2051               | 4,400                                      | 4,500                                      | 1,765                      | 0                             | 0                           | 1,765 | 2.49                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016 to 2021       | 100  | 100  | 75                         | 0                             | 0                           | 75    |                           |
| 2016 to 2031       | 0  | 0  | 85                         | 0                             | 0                           | 85    |                           |
| 2016 to 2041       | 100  | 100  | 120                        | 0                             | 0                           | 120   |                           |
| 2016 to 2051       | 300  | 300  | 205                        | 0                             | 0                           | 205   |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



## D.8 Alderville First Nation

### D.8.A Summary of Population and Housing

| Year               | Population                                 |  | Households                 |                               |                             |       | Persons Per Unit (P.P.U.) |
|--------------------|--|--|----------------------------|-------------------------------|-----------------------------|-------|---------------------------|
|                    | Excluding Census Undercount <sup>[1]</sup> | Including Census Undercount <sup>[1]</sup> | Low Density <sup>[2]</sup> | Medium Density <sup>[3]</sup> | High Density <sup>[4]</sup> | Total |                           |
| 2016               | 495  | 500  | 215                        | 5                             | 5                           | 225   | 2.22                      |
| 2021               | 495  | 500  | 215                        | 5                             | 5                           | 225   | 2.22                      |
| 2031               | 495  | 500  | 215                        | 5                             | 5                           | 225   | 2.22                      |
| 2041               | 495  | 500  | 215                        | 5                             | 5                           | 225   | 2.22                      |
| 2051               | 495  | 500  | 215                        | 5                             | 5                           | 225   | 2.22                      |
| <b>Incremental</b> |  |  |                            |                               |                             |       |                           |
| 2016-2021          | 0  | 0  | 0                          | 0                             | 0                           | 0     |                           |
| 2016-2031          | 0  | 0  | 0                          | 0                             | 0                           | 0     |                           |
| 2016-2041          | 0  | 0  | 0                          | 0                             | 0                           | 0     |                           |
| 2016-2051          | 0  | 0  | 0                          | 0                             | 0                           | 0     |                           |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 2.3%.

<sup>[2]</sup> Includes single and semi-detached units.

<sup>[3]</sup> Includes townhouses and apartments in duplexes.

<sup>[4]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. P.P.U. is calculated based on population excluding net Census undercount divided by total households.

Source: Historical 2016 data derived from Statistics Canada Census Profiles. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2021.



# Appendix E:

## Supplementary Residential Intensification Supply Data



## E.1 Intensification Opportunities by Area Municipality

### E.1.A Town of Cobourg

| Civic Address                                   | Approx. Hectares | Existing Use                           | Anticipated Timing of Development | Remarks on Intensification Potential               | Type of Intensification                   | Low Density <sup>[1]</sup> | Medium Density <sup>[2]</sup> | High Density <sup>[3]</sup> | Total |
|---|------------------|--|-----------------------------------|--|---|----------------------------|-------------------------------|-----------------------------|-------|
| D'Arcy/Elgin St E - LeBlanc                     | 1.05             | Vacant                                 | 1-5 Years                         | Near school, EC                                    |   |                            |                               | 21                          | 21    |
| Elgin St W - Vandyk West Park Village Phase 5   | 3.70             | Vacant                                 | 1-5 Years                         | Near retail plaza (72 units)                       | Infill Development                        |                            |                               | 72                          | 72    |
| D'Arcy/Nickerson - LeBlanc                      | 2.00             | Vacant                                 | 1-5 Years                         | Near school, EC (24 units)                         | Infill Development                        |                            |                               | 24                          | 24    |
| 845 Brook Rd N - Rondeau                        | 7.00             | Vacant                                 | 5-10 Years                        | Near CCC, parks                                    | Infill Development                        |                            |                               | 140                         | 140   |
| 321 Clyde St                                    | 0.33             | Vacant                                 | 1-5 Years                         | Near parks (4-8 units)                             | Infill Development                        |                            |                               | 4                           | 4     |
| 271 Clyde St                                    | 0.40             | Vacant                                 | 1-5 Years                         | Private forcemain (4-8 units)                      | Infill Development                        |                            |                               | 5                           | 5     |
| 160 Densmore Rd                                 | 2.50             | Vacant                                 | 1-5 Years                         | Near school, parks                                 | Infill Development                        |                            |                               | 125                         | 125   |
| 201 D'Arcy St                                   | 0.35             | Vacant                                 | 5-10 Years                        | Near downtown, schools                             | Infill Development                        |                            |                               | 18                          | 18    |
| 411 King St E                                   | 0.90             | Existing Vacant Heritage Building      | 1-5 Years                         | Near downtown, schools, 30 apartments              | Expansion/Conversion of Existing Building |                            |                               | 30                          | 30    |
| 377 William St                                  | 0.67             | Vacant                                 | 1-5 Years                         | Near downtown, library (14 units)                  | Infill Development                        |                            |                               | 14                          | 14    |
| 415 King St W                                   | 0.76             | Existing former industrial bldg        | 1-5 Years                         | Near downtown (26 units)                           | Expansion/Conversion of Existing Building |                            |                               | 26                          | 26    |
| 323 George St                                   | 1.00             | Existing former school bldg            | 1-5 Years                         | Phase 2 (36 new units, total 70)                   | Expansion/Conversion of Existing Building |                            |                               | 36                          | 36    |
| 425 King St E                                   | 1.60             | Vacant                                 | 1-5 Years                         | Former motel, vacant (27 units)                    | Infill Development                        |                            |                               | 27                          | 27    |
| 357-361 Elgin St W                              | 1.40             | Vacant                                 | 1-5 Years                         | Near YMCA, 84 Apartments, 16 townhouse             | Infill Development                        |                            | 16                            | 84                          | 100   |
| 440-448 Elgin St W                              | 0.75             | Vacant                                 | 1-5 Years                         | Near retail, open space, 24 Townhouses             | Infill Development                        |                            | 24                            |                             | 24    |
| 320 White St                                    | 3.00             | Vacant                                 | 5-10 Years                        | Adjacent to 401                                    | Infill Development                        |                            |                               | 36                          | 36    |
| 296 George St                                   | 0.22             | Vacant                                 | 1-5 Years                         | Downtown, 5 Towns, 12 Apartments                   | Infill Development                        |                            | 5                             | 12                          | 17    |
| 357 Westwood Dr                                 | 0.75             | Vacant                                 | 5-10 Years                        | Adjacent to retail, railway, 36 apartments         | Infill Development                        |                            |                               | 36                          | 36    |
| 431 Ontario St                                  | 0.38             | Vacant                                 | 1-5 Years                         | Former industrial site, 36 apartments              | Infill Development                        |                            |                               | 36                          | 36    |
| 473 Ontario St                                  |                  | Vacant                                 | 1-5 Years                         | 50-60 apartments                                   |   |                            |                               | 50                          | 50    |
| 25 James St E/321 John St                       | 0.30             | Affordable housing complex             | 1-5 Years                         | Expansion (27 units)                               | Infill Development                        |                            |                               | 27                          | 27    |
| 77 Albert St                                    | 0.64             | Existing Inn/restaurant                | 5-10 Years                        | Downtown   | Underutilized Lot                         |                            |                               | 8                           | 8     |
| 311-325 University Ave W                        | 0.50             | Former SFD, industrial                 | 1-5 Years                         | Near downtown, 71 apartment units                  | Infill Development                        |                            |                               | 71                          | 71    |
| 265-327 Elgin St E                              | 0.80             | Existing semi-detached complex         | 1-5 Years                         | Affordable intensification, 22 stacked towns       | Redevelopment                             |                            | 22                            |                             | 22    |
| 202 Second St                                   | 0.47             | Vacant, parking lot                    | 5-10 Years                        | Downtown, 45-50 apartment units                    | Infill Development                        |                            |                               | 45                          | 45    |
| 22-36 Queen St                                  | 0.43             | Existing parking lot/commercial bldg   | 5-10 Years                        | Downtown (79 units)                                | Infill Development                        |                            |                               | 79                          | 79    |
| 173-185 Division/9 Albert St                    | 0.24             | Vacant                                 | 1-5 Years                         | Downtown (23 units)                                | Redevelopment                             |                            |                               | 23                          | 23    |
| 185 First St                                    | 0.24             | Vacant                                 | 1-5 Years                         | Downtown, 13 apartments, 4 townhouses              | Infill Development                        |                            | 4                             | 13                          | 17    |
| 117 Durham St                                   | 1.85             | Vacant school field                    | 5-10 Years                        | Near downtown, waterfront                          | Vacant Lot                                |                            |                               | 22                          | 22    |
| Downtown (General)                              | 10.00            | Downtown intensification               | 10+ Years                         | Downtown intensification                           | Expansion/Conversion of Existing Building |                            |                               | 120                         | 120   |
| Division St North (Mixed Use Area)              | 15.00            | Commercial                             | 10+ Years                         | Commercial intensification                         | Redevelopment                             |                            |                               | 300                         | 300   |
| Division St Midtown (Mixed Use Area)            | 3.00             | Commercial                             | 10+ Years                         | Commercial intensification                         | Redevelopment                             |                            |                               | 60                          | 60    |
| King St E (Mixed Use Area)                      | 4.00             | Commercial, residential, institutional | 10+ Years                         | Intensification                                    | Redevelopment                             |                            |                               | 80                          | 80    |
| William St North (Mixed Use Area)               | 5.00             | Commercial, institutional              | 10+ Years                         | Intensification                                    | Redevelopment                             |                            |                               | 100                         | 100   |
| Elgin St W (Mixed Use Area)                     | 1.20             | Residential, institutional, vacant     | 5-10 Years                        | Intensification                                    | Redevelopment                             |                            |                               | 24                          | 24    |
| Tannery District                                | 15.00            | Residential, industrial, vacant        | 5-10 Years                        | Intensification                                    | Redevelopment                             |                            |                               | 300                         | 300   |
| 390 King St E                                   | 13.00            | Institutional (former youth centre)    | 1-5 Years                         | Re-development of former training school           | Redevelopment                             |                            |                               | 156                         | 156   |
| 300 White St                                    | 2.00             | Existing industrial building           | 10+ Years                         | Re-development of existing industrial bldg         | Redevelopment                             |                            |                               | 24                          | 24    |
| King St E (High Density Area)                   | 4.00             | Existing residential                   | 10+ Years                         | Re-development of existing residential             | Redevelopment                             |                            |                               | 200                         | 200   |
| Ontario St (Infill Area)                        | 0.30             | Vacant                                 | 5-10 Years                        | Intensification (between 50-100 apartments)        | Infill Development                        |                            |                               | 50                          | 50    |
| 637 Burwash St (Kerr St School Board Property)  | 5.60             | Vacant                                 | 5-10 Years                        | Intensification                                    | Infill Development                        |                            |                               | 67                          | 67    |
| 1111 Elgin St W (Northumberland Mall Mixed Use) | 10.00            | Existing Mall                          | 5-10 Years                        | Intensification                                    | Redevelopment                             |                            |                               | 500                         | 500   |
| County GPL Lands                                | 4.00             | Existing LTC Home (to be demolished)   | 5-10 Years                        | Redevelop LTC facility site for affordable housing | Redevelopment                             |                            |                               | 80                          | 80    |
| Total   |                  |  |                                   |  |   | 0                          | 71                            | 3,145                       | 3,216 |

<sup>[1]</sup> Includes single and semi-detached units.

<sup>[2]</sup> Includes townhouses and apartments in duplexes.

<sup>[3]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Source: Data provided by the Town of Cobourg summarized by Watson & Associates Economists Ltd., 2021.



E.1.B Municipality of Port Hope

| Civic Address                 | Approx. Hectares | Existing Use                | Anticipated Timing of Development | Remarks on Intensification Potential  | Type of Intensification                   | Low Density <sup>[1]</sup> | Medium Density <sup>[2]</sup> | High Density <sup>[3]</sup> | Total |
|-------------------------------|------------------|-----------------------------|-----------------------------------|---|---|----------------------------|-------------------------------|-----------------------------|-------|
| Talbot Drive Phase 2          | 1.72             | Vacant                      | 1-5 Years                         |   |   |                            | 21                            |                             | 21    |
| 1 Thompson Drive              | 0.23             | Vacant                      | 1-5 Years                         |   |   |                            | 15                            |                             | 15    |
| 2 Highland Drive              | 0.50             | Single-Family Detached      | 1-5 Years                         | Proposed semi-detached dwelling on the severed lot  | Redevelopment                             | 2                          | 0                             | 0                           | 2     |
| 121 Cavan Street              | 0.92             | Vacant- General employment  | 1-5 Years                         | Coming for Pre-con in Apr, proposing 60 units   | Expansion/Conversion of Existing Building | 0                          | 0                             | 60                          | 60    |
| 81 Walton Street              | 0.14             | Vacant- Downtown Commercial | 1-5 Years                         | Former Hotel, commercial at grade level and 18-unit high density units- Currently under SP approval                                     | Underutilized Lot                         | 0                          | 0                             | 18                          | 18    |
| 58 Sullivan Street            | 0.08             | Single-Family Detached      | 1-5 Years                         | Proposed semi-detached dwelling   | Underutilized Lot                         | 2                          | 0                             | 0                           | 2     |
| 38 Toronto Road               | 0.33             | Single-Family Detached      | 1-5 Years                         | Proposed 2 severances   | Redevelopment                             | 2                          | 0                             | 0                           | 2     |
| 198 Victoria Street N         | 0.45             | Single-Family Detached      | 1-5 Years                         | Pre-con in 2019, property for sale  | Vacant Lot                                | 0                          | 0                             | 9                           | 9     |
| 79 Mill Street N              | 0.20             | High Density Residential    | 1-5 Years                         | Near Downtown- Zoned RES4, Precon in 2021 for 12 unit   | Vacant Lot                                | 0                          | 0                             | 12                          | 12    |
| South of Croft Street         | 2.50             | Vacant                      | 5-10 Years                        | Med Res Designation; there is a SWM pond, so net area would be 1.8 ha; Owner contemplating low-rise apartments with underground parking |   | 0                          | 0                             | 108                         | 108   |
| 276 Victoria Street North     | 1.23             | Medium Density Res          | 5-10 Years                        | Draft Plan Approved for 45 TH units expired in 2017. Pre-consultation- 2 years ago (29 TH+ 11 apt units)                                | Vacant Lot                                | 0                          | 29                            | 11                          | 40    |
| 151 Toronto Road              | 0.37             | High Density Residential    | 5-10 Years                        | Near Retail Plaza- Precon in 2018   |   | 0                          | 0                             | 50                          | 50    |
| 7-29 Marsh Road               | 0.71             | High Density Residential    | 5-10 Years                        | Zoned High Density - Precon in 2013   | Redevelopment                             | 0                          | 0                             | 48                          | 48    |
| 10 Pine Street South          | 0.68             | Vacant- Former School       | 5-10 Years                        | Near Downtown   | Vacant Lot                                | 0                          | 14                            | 0                           | 14    |
| 138 Hope Street North         | 6.00             | 5 MTO Buildings             | 5-10 Years                        | 3 incotiguous lot, bisected in two places by Howard and Hope Street No- Declared surplus by MTO largest lot- 5 buildings                | Underutilized Lot                         | 0                          | 360                           | 0                           | 360   |
| Phils' Farm (264 Ward Street) | 13.30            | Medium and Low Residential  | 10+ Years                         | Vacant  | Vacant Lot                                | 0                          | 798                           | 0                           | 798   |
| Total                         |                  |                             |                                   |   |   | 6                          | 1,237                         | 316                         | 1,559 |

[1] Includes single and semi-detached units.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Source: Data provided by the Municipality of Port Hope summarized by Watson & Associates Economists Ltd., 2021.



E.1.C Municipality of Trent Hills

| Civic Address                         | Approx. Hectares | Existing Use    | Anticipated Timing of Development | Remarks on Intensification Potential | Type of Intensification | Low Density <sup>[1]</sup> | Medium Density <sup>[2]</sup> | High Density <sup>[3]</sup> | Total |
|---------------------------------------|------------------|-----------------|-----------------------------------|--------------------------------------|-------------------------|----------------------------|-------------------------------|-----------------------------|-------|
| Ferris Court                          | 0.73             |                 | 1-5 Years                         | Campbellford                         |                         |                            |                               | 20                          | 20    |
| Pellissier Street                     | 0.26             | Vacant          | 1-5 Years                         | Campbellford                         |                         |                            |                               | 4                           | 4     |
| First Street West extension           | 11.33            | Vacant          | 5-10 Years                        | Campbellford - Draft Plan Approved   |                         |                            |                               |                             | 136   |
| Naseby/Market Streets                 | 1.98             | Vacant          | 1-5 Years                         | Campbellford - Draft Plan Approved   |                         |                            |                               |                             | 35    |
| Church Avenue                         | 4.65             | Vacant          | 5-10 Years                        | Campbellford - Draft Plan Approved   |                         |                            |                               |                             | 65    |
| Vizamet Farms Ltd. (John Passalacqua) | 6.77             | Vacant          | 1-5 Years                         | Hastings - Draft Plan Approved       |                         | 33                         |                               |                             | 33    |
| Green Citywide Homes                  | 10.65            | Vacant          | 1-5 Years                         | Hastings - Draft Plan Approved       |                         | 90                         | 10                            |                             | 100   |
| Front Street West                     | 11.50            | Vacant          | 1-5 Years                         | Hastings - Draft Plan Approved       |                         | 0                          | 0                             | 0                           | 115   |
| Pond Street                           | 1.07             | Surface Parking | 1-5 Years                         | Hastings - Draft Plan Approved       |                         | 0                          | 34                            | 0                           | 34    |
| Homewood Avenue                       | 2.00             | Vacant          | 1-5 Years                         | Hastings - Draft Plan Approved       |                         | 0                          | 0                             | 0                           | 26    |
| Total                                 |                  |                 |                                   |                                      |                         | 123                        | 44                            | 24                          | 568   |

<sup>[1]</sup> Includes single and semi-detached units.  
<sup>[2]</sup> Includes townhouses and apartments in duplexes.  
<sup>[3]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.  
Source: Data provided by the Municipality of Trent Hills summarized by Watson & Associates Economists Ltd., 2021.



E.1.D Municipality of Brighton

| Civic Address  | Approx. Hectares | Existing Use             | Anticipated Timing of Development | Remarks on Intensification Potential                                | Type of Intensification                   | Low Density <sup>[1]</sup> | Medium Density <sup>[2]</sup> | High Density <sup>[3]</sup> | Total |
|--|------------------|--------------------------|-----------------------------------|---|---|----------------------------|-------------------------------|-----------------------------|-------|
| PLAN 28 PT LOTS 5 & 6 S/S:MAIN ST  | 2.50             | vacant residential       | 5-10 Years                        | poor lot shape for efficient development                            | Infill Development                        |                            |                               | 75                          | 75    |
| CON 2 PT LOT 2 RP 39R9723 PT PART 1 AND RP 39R11830 PARTS 4 AND 5 - North of Rosslyn Drive | 13.30            | vacant residential       | 5-10 Years                        | water crossing required   | Vacant Lot                                |                            |                               | 399                         | 399   |
| West of Young St - CON 2 PT LOT 1 RP 39R10477;PART 1                                       | 2.50             | vacant residential       | 10+ Years                         |   |   |                            |                               | 75                          | 75    |
| 103 & 143 Dundas   | 1.20             | vacant residential       | 5-10 Years                        |   | Underutilized Lot                         |                            |                               | 36                          | 36    |
| 93 PRINCE EDWARD ST  | 2.60             | vacant industrial        | 5-10 Years                        | contaminated brownfield   | Infill Development                        |                            |                               | 78                          | 78    |
| 37 PINNACLE ST S & 123-127 Elizabeth St  | 8.20             | community facility lands | 5-10 Years                        | Municipality owned lands for recreation                             | Infill Development                        |                            |                               | 0                           | 0     |
| CON C PT LOT 33 RP 38R4209;PART 1 &40/54 Price Street                                      | 2.40             | vacant residential       | 1-5 Years                         | floodplain/EP constraint, partially located in Intensification area | Vacant Lot                                |                            |                               | 29                          | 29    |
| SE corner Price St E/Baldwin   | 0.20             | vacant residential       | 0                                 |   |   |                            |                               | 0                           | 0     |
| 101 Harbour St   | 0.35             | townhouses condo         | 1-5 Years                         | marina component  | Underutilized Lot                         |                            |                               | 11                          | 11    |
| 175A ONTARIO ST (a.k.a. Lance Est.)  | 6.10             | vacant residential       | 1-5 Years                         | ha is net of EP   | Vacant Lot                                |                            |                               | 183                         | 183   |
| 169 ONTARIO ST   | 5.60             | vacant residential       | 1-5 Years                         |   | 0 Vacant Lot                              |                            |                               | 168                         | 168   |
| PLAN 39M829 BLK 19 (Roos)  | 0.65             | vacant residential       | 1-5 Years                         |   | Vacant Lot                                |                            |                               | 9                           | 9     |
| 1&2 Hodgson, & 86 Ontario St   | 6.50             | vacant residential       | 5-10 Years                        |   | 0 Underutilized Lot                       |                            |                               | 0                           | 0     |
| 97 ONTARIO ST  | 0.80             | vacant residential       | 1-5 Years                         | narrow lot limits density   | Infill Development                        |                            |                               | 16                          | 16    |
| 85 ONTARIO ST facing Butler Street   | 2.20             | mobile home park         | 10+ Years                         | flood plain restrictions, lot shape constraints                     | Underutilized Lot                         |                            |                               | 18                          | 18    |
| 80 Butler Street   | 0.80             | vacant industrial        | 0                                 |   |   |                            |                               | 0                           | 0     |
| Price/Baldwin, southeast corner  | 0.43             | vacant residential       | 1-5 Years                         |   | Redevelopment                             |                            |                               | 2                           | 2     |
| Cassidey Drive (termination of Foxden and Deerfield Dr)                                    | 0.30             | vacant residential       | 1-5 Years                         | nearing completion, has 3 second units                              | Infill Development                        |                            |                               | 4                           | 4     |
| 247 Main Street  | 1.70             | vacant mixed use         | 5-10 Years                        |   | Underutilized Lot                         |                            |                               | 14                          | 14    |
| 233 Main Street  | 1.30             | vacant mixed use         | 5-10 Years                        |   | Vacant Lot                                |                            |                               | 10                          | 10    |
| 60 Butler Street   | 0.40             | vacant industrial        | 5-10 Years                        |   | Vacant Lot                                |                            |                               | 1                           | 1     |
| 6 Elizabeth Street   | 0.18             | vacant commercial        | 1-5 Years                         | anticipated CIP to encourage development                            | Infill Development                        |                            |                               | 0                           | 0     |
| 28/30 Division St N  | 0.00             | vacant residential       | 1-5 Years                         |   | Redevelopment                             |                            |                               | 6                           | 6     |
| additional/second units  | 0.00             | residential              | 0                                 | targeting 4 per year  | Expansion/Conversion of Existing Building |                            |                               | 0                           | 0     |
| Total  |                  |                          |                                   |   |   | 0                          | 0                             | 1,097                       | 1,097 |

<sup>[1]</sup> Includes single and semi-detached units.  
<sup>[2]</sup> Includes townhouses and apartments in duplexes.  
<sup>[3]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.  
Source: Data provided by the Municipality of Brighton summarized by Watson & Associates Economists Ltd., 2021.



E.1.E Township of Cramahe

| Civic Address                        | Approx. Hectares | Existing Use             | Anticipated Timing of Development | Remarks on Intensification Potential | Type of Intensification                   | Low Density <sup>[1]</sup> | Medium Density <sup>[2]</sup> | High Density <sup>[3]</sup> | Total |
|--------------------------------------|------------------|--------------------------|-----------------------------------|--------------------------------------|---|----------------------------|-------------------------------|-----------------------------|-------|
| 1 Church Street                      | 0.15             | former church            | 1-5 Years                         | downtown location                    | Expansion/Conversion of Existing Building | 0                          | 0                             | 15                          | 15    |
| 11 Toronto Street                    | 0.14             | former opera house       | 1-5 Years                         | downtown location                    | Expansion/Conversion of Existing Building | 0                          | 0                             | 6                           | 6     |
| Victoria Street                      | 0.98             | infill on R-Plan         | 1-5 Years                         | within existing neighbourhood        | Infill Development                        | 0                          | 10                            | 0                           | 10    |
| Victoria Street at Arthur            | 0.37             | infill                   | 1-5 Years                         | multi-unit residential on one lot    | Infill Development                        | 0                          | 0                             | 11                          | 11    |
| Ontario Street                       | 0.52             | vacant land              | 1-5 Years                         | R2 uses in R1 area                   | Vacant Lot                                | 0                          | 12                            | 0                           | 12    |
| Ontario Street rear of Keeler Centre | 2.00             | vacant land              | 5-10 Years                        | use of underutilized twp-owned lands | Underutilized Lot                         | 0                          | 40                            | 0                           | 40    |
| Toronto Street                       | 0.19             | was commercial with apts | 5-10 Years                        | fire destroyed building              | Redevelopment                             | 0                          | 0                             | 4                           | 4     |
| 20 Park St                           | 12.00            | vacant land              | 1-5 Years                         | subdivision                          | Vacant Lot                                | 56                         | 0                             | 0                           | 56    |
| Total                                |                  |                          |                                   |                                      |   | 56                         | 62                            | 36                          | 154   |

<sup>[1]</sup> Includes single and semi-detached units.  
<sup>[2]</sup> Includes townhouses and apartments in duplexes.  
<sup>[3]</sup> Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.  
Source: Data provided by the Township of Cramahe summarized by Watson & Associates Economists Ltd., 2021.





# Appendix F:

## Employment Forecast by Area Municipality



# Appendix F: Employment Forecast by Area Municipality

## F.1 Total Employment by Area Municipality, 2016 to 2051

| Year  | Town of Cobourg | Municipality of Port Hope | Municipality of Trent Hills | Municipality of Brighton | Township of Hamilton | Township of Alnwick/Haldimand | Township of Cramahe | Alderville First Nations | Northumberland County |
|---|-----------------|---------------------------|-----------------------------|--------------------------|----------------------|-------------------------------|---------------------|--------------------------|-----------------------|
| 2016  | 12,250          | 6,790                     | 4,470                       | 2,850                    | 1,650                | 1,420                         | 1,770               | 150                      | 31,330                |
| 2021  | 12,710          | 7,060                     | 4,620                       | 2,900                    | 1,690                | 1,470                         | 1,780               | 150                      | 32,370                |
| 2026  | 13,200          | 7,470                     | 4,780                       | 2,940                    | 1,750                | 1,510                         | 1,800               | 150                      | 33,590                |
| 2031  | 13,810          | 7,930                     | 4,930                       | 2,980                    | 1,840                | 1,560                         | 1,820               | 150                      | 35,000                |
| 2036  | 14,580          | 8,580                     | 5,160                       | 3,040                    | 1,930                | 1,610                         | 1,840               | 150                      | 36,870                |
| 2041  | 15,450          | 9,210                     | 5,400                       | 3,190                    | 2,070                | 1,670                         | 1,870               | 150                      | 39,000                |
| 2046  | 16,550          | 9,820                     | 5,640                       | 3,580                    | 2,100                | 1,710                         | 1,920               | 150                      | 41,460                |
| 2051  | 17,760          | 10,680                    | 5,990                       | 3,610                    | 2,160                | 1,710                         | 1,950               | 150                      | 44,000                |
| Share of 2016 County Employment                 | 39%             | 22%                       | 14%                         | 9%                       | 5%                   | 5%                            | 6%                  | 0%                       | 100%                  |
| Share of 2051 County Employment                 | 40%             | 24%                       | 14%                         | 8%                       | 5%                   | 4%                            | 4%                  | 0%                       | 100%                  |
| Employment Growth                               |                 |                           |                             |                          |                      |                               |                     |                          |                       |
| 2016 to 2051                                    | 5,510           | 3,890                     | 1,520                       | 760                      | 510                  | 290                           | 180                 | 0                        | 12,670                |
| Annual Growth Rate, 2016 to 2051                | 1.1%            | 1.3%                      | 0.8%                        | 0.7%                     | 0.8%                 | 0.5%                          | 0.3%                | 0.0%                     | 1.0%                  |
| Share of County Employment Growth, 2016 to 2051 | 43%             | 31%                       | 12%                         | 6%                       | 4%                   | 2%                            | 1%                  | 0%                       | 100%                  |

Note: Employment figures include usual place of work, work at home and no fixed place of work (N.F.P.O.W.). Statistics Canada defines N.F.P.O.W. employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc." Figures may not add up precisely due to rounding.

Source: Historical employment derived from Statistics Canada Place of Work data. 2051 employment figure based on Growth Plan, Schedule 3 by Watson & Associates Economists Ltd., 2021.



## F.2 Town of Cobourg

### F.2.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          | 4,910                      | 7,340                         | 12,250                 |                                 |             |                        | 12,250                          | 100%                 | 0%                   |
| 2021                          | 4,910                      | 7,670                         | 12,580                 |                                 |             |                        | 12,580                          | 100%                 | 0%                   |
| 2026                          | 5,200                      | 8,000                         | 13,200                 |                                 |             |                        | 13,200                          | 100%                 | 0%                   |
| 2031                          | 5,380                      | 8,430                         | 13,810                 |                                 |             |                        | 13,810                          | 100%                 | 0%                   |
| 2036                          | 5,700                      | 8,880                         | 14,580                 |                                 |             |                        | 14,580                          | 100%                 | 0%                   |
| 2041                          | 6,040                      | 9,420                         | 15,460                 |                                 |             |                        | 15,460                          | 100%                 | 0%                   |
| 2046                          | 6,490                      | 10,060                        | 16,550                 |                                 |             |                        | 16,550                          | 100%                 | 0%                   |
| 2051                          | 6,860                      | 10,780                        | 17,640                 |                                 |             |                        | 17,640                          | 100%                 | 0%                   |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 0                          | 330                           | 330                    | 0                               | 0           | 0                      | 330                             |                      |                      |
| 2016 to 2026                  | 290                        | 660                           | 950                    | 0                               | 0           | 0                      | 950                             |                      |                      |
| 2016 to 2031                  | 470                        | 1,090                         | 1,560                  | 0                               | 0           | 0                      | 1,560                           |                      |                      |
| 2016 to 2036                  | 790                        | 1,540                         | 2,330                  | 0                               | 0           | 0                      | 2,330                           |                      |                      |
| 2016 to 2041                  | 1,130                      | 2,080                         | 3,210                  | 0                               | 0           | 0                      | 3,210                           |                      |                      |
| 2016 to 2046                  | 1,580                      | 2,720                         | 4,300                  | 0                               | 0           | 0                      | 4,300                           |                      |                      |
| 2016 to 2051                  | 1,950                      | 3,440                         | 5,390                  | 0                               | 0           | 0                      | 5,390                           |                      |                      |

<sup>[1]</sup> All employment outside of Urban Settlement Areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.



### F.3 Municipality of Port Hope

#### F.3.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          | 2,230                      | 3,220                         | 5,450                  | 390                             | 1,020       | 1,410                  | 6,860                           | 79%                  | 21%                  |
| 2021                          | 2,350                      | 3,340                         | 5,690                  | 420                             | 1,020       | 1,440                  | 7,130                           | 80%                  | 20%                  |
| 2026                          | 2,540                      | 3,520                         | 6,060                  | 450                             | 1,040       | 1,490                  | 7,550                           | 80%                  | 20%                  |
| 2031                          | 2,740                      | 3,720                         | 6,460                  | 480                             | 1,050       | 1,530                  | 7,990                           | 81%                  | 19%                  |
| 2036                          | 3,100                      | 3,940                         | 7,040                  | 550                             | 1,060       | 1,610                  | 8,650                           | 81%                  | 19%                  |
| 2041                          | 3,410                      | 4,190                         | 7,600                  | 600                             | 1,080       | 1,680                  | 9,280                           | 82%                  | 18%                  |
| 2046                          | 3,760                      | 4,380                         | 8,140                  | 660                             | 1,090       | 1,750                  | 9,890                           | 82%                  | 18%                  |
| 2051                          | 4,190                      | 4,710                         | 8,900                  | 730                             | 1,100       | 1,830                  | 10,730                          | 83%                  | 17%                  |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 120                        | 120                           | 240                    | 30                              | 0           | 30                     | 270                             |                      |                      |
| 2016 to 2026                  | 310                        | 300                           | 610                    | 60                              | 20          | 80                     | 690                             |                      |                      |
| 2016 to 2031                  | 510                        | 500                           | 1,010                  | 90                              | 30          | 120                    | 1,130                           |                      |                      |
| 2016 to 2036                  | 870                        | 720                           | 1,590                  | 160                             | 40          | 200                    | 1,790                           |                      |                      |
| 2016 to 2041                  | 1,180                      | 970                           | 2,150                  | 210                             | 60          | 270                    | 2,420                           |                      |                      |
| 2016 to 2046                  | 1,530                      | 1,160                         | 2,690                  | 270                             | 70          | 340                    | 3,030                           |                      |                      |
| 2016 to 2051                  | 1,960                      | 1,490                         | 3,450                  | 340                             | 80          | 420                    | 3,870                           |                      |                      |

<sup>[1]</sup> All employment outside of Urban Settlement Areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.



## F.4 Municipality of Trent Hills

### F.4.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          | 880                        | 1,900                         | 2,780                  | 120                             | 1,570       | 1,690                  | 4,470                           | 62%                  | 38%                  |
| 2021                          | 940                        | 1,960                         | 2,900                  | 120                             | 1,610       | 1,730                  | 4,630                           | 63%                  | 37%                  |
| 2026                          | 1,010                      | 2,020                         | 3,030                  | 130                             | 1,630       | 1,760                  | 4,790                           | 63%                  | 37%                  |
| 2031                          | 1,080                      | 2,070                         | 3,150                  | 140                             | 1,640       | 1,780                  | 4,930                           | 64%                  | 36%                  |
| 2036                          | 1,210                      | 2,120                         | 3,330                  | 160                             | 1,670       | 1,830                  | 5,160                           | 65%                  | 35%                  |
| 2041                          | 1,360                      | 2,160                         | 3,520                  | 180                             | 1,700       | 1,880                  | 5,400                           | 65%                  | 35%                  |
| 2046                          | 1,480                      | 2,250                         | 3,730                  | 200                             | 1,730       | 1,930                  | 5,660                           | 66%                  | 34%                  |
| 2051                          | 1,640                      | 2,370                         | 4,010                  | 220                             | 1,770       | 1,990                  | 6,000                           | 67%                  | 33%                  |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 60                         | 60                            | 120                    | 0                               | 40          | 40                     | 160                             |                      |                      |
| 2016 to 2026                  | 130                        | 120                           | 250                    | 10                              | 60          | 70                     | 320                             |                      |                      |
| 2016 to 2031                  | 200                        | 170                           | 370                    | 20                              | 70          | 90                     | 460                             |                      |                      |
| 2016 to 2036                  | 330                        | 220                           | 550                    | 40                              | 100         | 140                    | 690                             |                      |                      |
| 2016 to 2041                  | 480                        | 260                           | 740                    | 60                              | 130         | 190                    | 930                             |                      |                      |
| 2016 to 2046                  | 600                        | 350                           | 950                    | 80                              | 160         | 240                    | 1,190                           |                      |                      |
| 2016 to 2051                  | 760                        | 470                           | 1,230                  | 100                             | 200         | 300                    | 1,530                           |                      |                      |

<sup>[1]</sup> All employment outside of Urban Settlement Areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.



## F.5 Municipality of Brighton

### F.5.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          | 1,420                      | 1,090                         | 2,510                  | 110                             | 240         | 350                    | 2,860                           | 88%                  | 12%                  |
| 2021                          | 1,430                      | 1,110                         | 2,540                  | 110                             | 250         | 360                    | 2,900                           | 88%                  | 12%                  |
| 2026                          | 1,450                      | 1,130                         | 2,580                  | 110                             | 260         | 370                    | 2,950                           | 87%                  | 13%                  |
| 2031                          | 1,460                      | 1,150                         | 2,610                  | 110                             | 260         | 370                    | 2,980                           | 88%                  | 12%                  |
| 2036                          | 1,490                      | 1,170                         | 2,660                  | 110                             | 260         | 370                    | 3,030                           | 88%                  | 12%                  |
| 2041                          | 1,550                      | 1,240                         | 2,790                  | 120                             | 280         | 400                    | 3,190                           | 87%                  | 13%                  |
| 2046                          | 1,720                      | 1,390                         | 3,110                  | 130                             | 350         | 480                    | 3,590                           | 87%                  | 13%                  |
| 2051                          | 1,730                      | 1,420                         | 3,150                  | 130                             | 340         | 470                    | 3,620                           | 87%                  | 13%                  |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 10                         | 20                            | 30                     | 0                               | 10          | 10                     | 40                              |                      |                      |
| 2016 to 2026                  | 30                         | 40                            | 70                     | 0                               | 20          | 20                     | 90                              |                      |                      |
| 2016 to 2031                  | 40                         | 60                            | 100                    | 0                               | 20          | 20                     | 120                             |                      |                      |
| 2016 to 2036                  | 70                         | 80                            | 150                    | 0                               | 20          | 20                     | 170                             |                      |                      |
| 2016 to 2041                  | 130                        | 150                           | 280                    | 10                              | 40          | 50                     | 330                             |                      |                      |
| 2016 to 2046                  | 300                        | 300                           | 600                    | 20                              | 110         | 130                    | 730                             |                      |                      |
| 2016 to 2051                  | 310                        | 330                           | 640                    | 20                              | 100         | 120                    | 760                             |                      |                      |

<sup>[1]</sup> All employment outside of Urban Settlement Areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.



## F.6 Township of Hamilton

### F.6.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          |                            |                               | 0                      | 570                             | 1,090       | 1,660                  | 1,660                           | 0%                   | 100%                 |
| 2021                          |                            |                               | 0                      | 580                             | 1,120       | 1,700                  | 1,700                           | 0%                   | 100%                 |
| 2026                          |                            |                               | 0                      | 590                             | 1,160       | 1,750                  | 1,750                           | 0%                   | 100%                 |
| 2031                          |                            |                               | 0                      | 620                             | 1,220       | 1,840                  | 1,840                           | 0%                   | 100%                 |
| 2036                          |                            |                               | 0                      | 650                             | 1,280       | 1,930                  | 1,930                           | 0%                   | 100%                 |
| 2041                          |                            |                               | 0                      | 700                             | 1,370       | 2,070                  | 2,070                           | 0%                   | 100%                 |
| 2046                          |                            |                               | 0                      | 720                             | 1,380       | 2,100                  | 2,100                           | 0%                   | 100%                 |
| 2051                          |                            |                               | 0                      | 770                             | 1,390       | 2,160                  | 2,160                           | 0%                   | 100%                 |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 0                          | 0                             | 0                      | 10                              | 30          | 40                     | 40                              |                      |                      |
| 2016 to 2026                  | 0                          | 0                             | 0                      | 20                              | 70          | 90                     | 90                              |                      |                      |
| 2016 to 2031                  | 0                          | 0                             | 0                      | 50                              | 130         | 180                    | 180                             |                      |                      |
| 2016 to 2036                  | 0                          | 0                             | 0                      | 80                              | 190         | 270                    | 270                             |                      |                      |
| 2016 to 2041                  | 0                          | 0                             | 0                      | 130                             | 280         | 410                    | 410                             |                      |                      |
| 2016 to 2046                  | 0                          | 0                             | 0                      | 150                             | 290         | 440                    | 440                             |                      |                      |
| 2016 to 2051                  | 0                          | 0                             | 0                      | 200                             | 300         | 500                    | 500                             |                      |                      |

<sup>[1]</sup> All employment outside of Urban Settlement Areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.



## F.7 Township of Alnwick/Hamilton

### F.7.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          |                            |                               | 0                      | 340                             | 1,080       | 1,420                  | 1,420                           | 0%                   | 100%                 |
| 2021                          |                            |                               | 0                      | 350                             | 1,120       | 1,470                  | 1,470                           | 0%                   | 100%                 |
| 2026                          |                            |                               | 0                      | 360                             | 1,150       | 1,510                  | 1,510                           | 0%                   | 100%                 |
| 2031                          |                            |                               | 0                      | 370                             | 1,190       | 1,560                  | 1,560                           | 0%                   | 100%                 |
| 2036                          |                            |                               | 0                      | 390                             | 1,220       | 1,610                  | 1,610                           | 0%                   | 100%                 |
| 2041                          |                            |                               | 0                      | 410                             | 1,260       | 1,670                  | 1,670                           | 0%                   | 100%                 |
| 2046                          |                            |                               | 0                      | 420                             | 1,280       | 1,700                  | 1,700                           | 0%                   | 100%                 |
| 2051                          |                            |                               | 0                      | 430                             | 1,280       | 1,710                  | 1,710                           | 0%                   | 100%                 |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 0                          | 0                             | 0                      | 10                              | 40          | 50                     | 50                              |                      |                      |
| 2016 to 2026                  | 0                          | 0                             | 0                      | 20                              | 70          | 90                     | 90                              |                      |                      |
| 2016 to 2031                  | 0                          | 0                             | 0                      | 30                              | 110         | 140                    | 140                             |                      |                      |
| 2016 to 2036                  | 0                          | 0                             | 0                      | 50                              | 140         | 190                    | 190                             |                      |                      |
| 2016 to 2041                  | 0                          | 0                             | 0                      | 70                              | 180         | 250                    | 250                             |                      |                      |
| 2016 to 2046                  | 0                          | 0                             | 0                      | 80                              | 200         | 280                    | 280                             |                      |                      |
| 2016 to 2051                  | 0                          | 0                             | 0                      | 90                              | 200         | 290                    | 290                             |                      |                      |

<sup>[1]</sup> All employment outside of Urban Settlement Areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.





## F.8 Township of Cramahe

### F.8.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          | 80                         | 430                           | 510                    | 720                             | 540         | 1,260                  | 1,770                           | 29%                  | 71%                  |
| 2021                          | 80                         | 440                           | 520                    | 730                             | 540         | 1,270                  | 1,790                           | 29%                  | 71%                  |
| 2026                          | 110                        | 440                           | 550                    | 730                             | 540         | 1,270                  | 1,820                           | 30%                  | 70%                  |
| 2031                          | 110                        | 450                           | 560                    | 740                             | 540         | 1,280                  | 1,840                           | 30%                  | 70%                  |
| 2036                          | 120                        | 460                           | 580                    | 750                             | 550         | 1,300                  | 1,880                           | 31%                  | 69%                  |
| 2041                          | 120                        | 480                           | 600                    | 760                             | 550         | 1,310                  | 1,910                           | 31%                  | 69%                  |
| 2046                          | 120                        | 500                           | 620                    | 770                             | 560         | 1,330                  | 1,950                           | 32%                  | 68%                  |
| 2051                          | 120                        | 510                           | 630                    | 770                             | 570         | 1,340                  | 1,970                           | 32%                  | 68%                  |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 0                          | 10                            | 10                     | 10                              | 0           | 10                     | 20                              |                      |                      |
| 2016 to 2026                  | 30                         | 10                            | 40                     | 10                              | 0           | 10                     | 50                              |                      |                      |
| 2016 to 2031                  | 30                         | 20                            | 50                     | 20                              | 0           | 20                     | 70                              |                      |                      |
| 2016 to 2036                  | 40                         | 30                            | 70                     | 30                              | 10          | 40                     | 110                             |                      |                      |
| 2016 to 2041                  | 40                         | 50                            | 90                     | 40                              | 10          | 50                     | 140                             |                      |                      |
| 2016 to 2046                  | 40                         | 70                            | 110                    | 50                              | 20          | 70                     | 180                             |                      |                      |
| 2016 to 2051                  | 40                         | 80                            | 120                    | 50                              | 30          | 80                     | 200                             |                      |                      |

<sup>[1]</sup> All employment outside of urban settlement areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.



## F.9 Alderville First Nation

### F.9.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| 2021                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| 2026                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| 2031                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| 2036                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| 2041                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| 2046                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| 2051                          |                            |                               |                        | 40                              | 100         | 140                    | 140                             | 0%                   | 100%                 |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 0                          | 0                             | 0                      | 0                               | 0           | 0                      | 0                               |                      |                      |
| 2016 to 2026                  | 0                          | 0                             | 0                      | 0                               | 0           | 0                      | 0                               |                      |                      |
| 2016 to 2031                  | 0                          | 0                             | 0                      | 0                               | 0           | 0                      | 0                               |                      |                      |
| 2016 to 2036                  | 0                          | 0                             | 0                      | 0                               | 0           | 0                      | 0                               |                      |                      |
| 2016 to 2041                  | 0                          | 0                             | 0                      | 0                               | 0           | 0                      | 0                               |                      |                      |
| 2016 to 2046                  | 0                          | 0                             | 0                      | 0                               | 0           | 0                      | 0                               |                      |                      |
| 2016 to 2051                  | 0                          | 0                             | 0                      | 0                               | 0           | 0                      | 0                               |                      |                      |

<sup>[1]</sup> All employment outside of urban settlement areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

Source: Watson & Associates Economists Ltd., 2021.



## F.10 Northumberland County

### F.10.A Summary of Employment by Urban and Rural Area and Land Use Category

| Year                          | Urban Employment           |                               |                        | Rural Employment <sup>[1]</sup> |             |                        | Total Employment <sup>[2]</sup> | Urban Employment (%) | Rural Employment (%) |
|-------------------------------|----------------------------|-------------------------------|------------------------|---------------------------------|-------------|------------------------|---------------------------------|----------------------|----------------------|
|                               | Employment Land Employment | Population-Related Employment | Total Urban Employment | Employment Land Employment      | Other Rural | Total Rural Employment |                                 |                      |                      |
|                               | A                          | B                             | C = A + B              | D                               | E           | D                      |                                 |                      |                      |
| 2016                          | 9,520                      | 13,980                        | 23,500                 | 2,290                           | 5,640       | 7,930                  | 31,430                          | 75%                  | 25%                  |
| 2021                          | 9,710                      | 14,520                        | 24,230                 | 2,350                           | 5,760       | 8,110                  | 32,340                          | 75%                  | 25%                  |
| 2026                          | 10,310                     | 15,110                        | 25,420                 | 2,410                           | 5,880       | 8,290                  | 33,710                          | 75%                  | 25%                  |
| 2031                          | 10,770                     | 15,820                        | 26,590                 | 2,500                           | 6,000       | 8,500                  | 35,090                          | 76%                  | 24%                  |
| 2036                          | 11,620                     | 16,570                        | 28,190                 | 2,650                           | 6,140       | 8,790                  | 36,980                          | 76%                  | 24%                  |
| 2041                          | 12,480                     | 17,490                        | 29,970                 | 2,810                           | 6,340       | 9,150                  | 39,120                          | 77%                  | 23%                  |
| 2046                          | 13,570                     | 18,580                        | 32,150                 | 2,940                           | 6,490       | 9,430                  | 41,580                          | 77%                  | 23%                  |
| 2051                          | 14,540                     | 19,790                        | 34,330                 | 3,090                           | 6,550       | 9,640                  | 43,970                          | 78%                  | 22%                  |
| Incremental Employment Growth |                            |                               |                        |                                 |             |                        |                                 |                      |                      |
| 2016 to 2021                  | 190                        | 540                           | 730                    | 60                              | 120         | 180                    | 910                             |                      |                      |
| 2016 to 2026                  | 790                        | 1,130                         | 1,920                  | 120                             | 240         | 360                    | 2,280                           |                      |                      |
| 2016 to 2031                  | 1,250                      | 1,840                         | 3,090                  | 210                             | 360         | 570                    | 3,660                           |                      |                      |
| 2016 to 2036                  | 2,100                      | 2,590                         | 4,690                  | 360                             | 500         | 860                    | 5,550                           |                      |                      |
| 2016 to 2041                  | 2,960                      | 3,510                         | 6,470                  | 520                             | 700         | 1,220                  | 7,690                           |                      |                      |
| 2016 to 2046                  | 4,050                      | 4,600                         | 8,650                  | 650                             | 850         | 1,500                  | 10,150                          |                      |                      |
| 2016 to 2051                  | 5,020                      | 5,810                         | 10,830                 | 800                             | 910         | 1,710                  | 12,540                          |                      |                      |

<sup>[1]</sup> All employment outside of urban settlement areas.

<sup>[2]</sup> Includes work at home and no fixed place of work.

Notes: Figures have been rounded and may not add precisely at the area municipal level.

Employment Land Employment is defined as employment within “industrial-type” buildings.

Source: Watson & Associates Economists Ltd., 2021.



## F.10.B Summary of Employment by Urban Area and by Area Municipality

| Year  | Town of Cobourg | Municipality of Port Hope | Municipality of Trent Hills | Municipality of Brighton | Township of Hamilton | Township of Alnwick/Haldimand | Township of Cramahe | Alderville First Nations | Urban Area Northumberland County Urban Total | Urban Area Employment as a Share of County-Wide Employment |
|---|-----------------|---------------------------|-----------------------------|--------------------------|----------------------|-------------------------------|---------------------|--------------------------|--|--|
| 2016  | 12,250          | 5,450                     | 2,780                       | 2,510                    | -                    | -                             | 510                 | -                        | 23,500                                       | 75%  |
| 2021  | 12,580          | 5,690                     | 2,900                       | 2,540                    | -                    | -                             | 520                 | -                        | 24,230                                       | 75%  |
| 2026  | 13,200          | 6,060                     | 3,030                       | 2,580                    | -                    | -                             | 550                 | -                        | 25,420                                       | 75%  |
| 2031  | 13,810          | 6,460                     | 3,150                       | 2,610                    | -                    | -                             | 560                 | -                        | 26,590                                       | 76%  |
| 2036  | 14,580          | 7,040                     | 3,330                       | 2,660                    | -                    | -                             | 580                 | -                        | 28,190                                       | 76%  |
| 2041  | 15,460          | 7,600                     | 3,520                       | 2,790                    | -                    | -                             | 600                 | -                        | 29,970                                       | 77%  |
| 2046  | 16,550          | 8,140                     | 3,730                       | 3,110                    | -                    | -                             | 620                 | -                        | 32,150                                       | 77%  |
| 2051  | 17,640          | 8,900                     | 4,010                       | 3,150                    | -                    | -                             | 630                 | -                        | 34,330                                       | 78%  |
| Share of County's 2016 Urban Employment                 | 52%             | 23%                       | 12%                         | 11%                      | 0%                   | 0%                            | 2%                  | 0%                       | 100%   |  |
| Share of County's 2051 Urban Employment                 | 51%             | 26%                       | 12%                         | 9%                       | 0%                   | 0%                            | 2%                  | 0%                       | 100%   |  |
| Urban Employment Growth                                 |                 |                           |                             |                          |                      |                               |                     |                          |  |  |
| 2016 to 2051  | 5,390           | 3,450                     | 1,230                       | 640                      | -                    | -                             | 120                 | -                        | 10,830                                       | 86%  |
| Annual Growth Rate, 2016 to 2051                        | 1.0%            | 1.4%                      | 1.1%                        | 0.7%                     |                      |                               | 0.6%                |                          | 1.1%   |  |
| Share of County's Urban Employment Growth, 2016 to 2051 | 50%             | 32%                       | 11%                         | 6%                       | 0%                   | 0%                            | 1%                  | 0%                       | 100%   |  |

Notes: Figures have been rounded and may not add precisely at the area municipal level. Includes work at home and no fixed place of work.  
Source: Watson & Associates Economists Ltd., 2021.



### F.10.C Summary of Employment by Rural Area and by Area Municipality

| Year  | Town of Cobourg | Municipality of Port Hope | Municipality of Trent Hills | Municipality of Brighton | Township of Hamilton | Township of Alnwick/Haldimand | Township of Cramahe | Alderville First Nations | Rural Area Northumberland County Urban Total | Rural Area Employment as a Share of County-Wide Employment |
|---|-----------------|---------------------------|-----------------------------|--------------------------|----------------------|-------------------------------|---------------------|--------------------------|--|--|
| 2016  | 0               | 1,410                     | 1,690                       | 350                      | 1,660                | 1,420                         | 1,260               | 140                      | 7,930  | 25%  |
| 2021  | 0               | 1,440                     | 1,730                       | 360                      | 1,700                | 1,470                         | 1,270               | 140                      | 8,110  | 25%  |
| 2026  | 0               | 1,490                     | 1,760                       | 370                      | 1,750                | 1,510                         | 1,270               | 140                      | 8,290  | 25%  |
| 2031  | 0               | 1,530                     | 1,780                       | 370                      | 1,840                | 1,560                         | 1,280               | 140                      | 8,500  | 24%  |
| 2036  | 0               | 1,610                     | 1,830                       | 370                      | 1,930                | 1,610                         | 1,300               | 140                      | 8,790  | 24%  |
| 2041  | 0               | 1,680                     | 1,880                       | 400                      | 2,070                | 1,670                         | 1,310               | 140                      | 9,150  | 23%  |
| 2046  | 0               | 1,750                     | 1,930                       | 480                      | 2,100                | 1,700                         | 1,330               | 140                      | 9,430  | 23%  |
| 2051  | 0               | 1,830                     | 1,990                       | 470                      | 2,160                | 1,710                         | 1,340               | 140                      | 9,640  | 22%  |
| Share of County's 2016 Rural Employment                 | 0%              | 18%                       | 21%                         | 4%                       | 21%                  | 18%                           | 16%                 | 2%                       | 100%   |  |
| Share of County's 2051 Rural Employment                 | 0%              | 19%                       | 21%                         | 5%                       | 22%                  | 18%                           | 14%                 | 1%                       | 100%   |  |
| <b>Rural Employment Growth</b>                          |                 |                           |                             |                          |                      |                               |                     |                          |  |  |
| 2016 to 2051  | 0               | 420                       | 300                         | 120                      | 500                  | 290                           | 80                  | -                        | 1,710  | 14%  |
| Annual Growth Rate, 2016 to 2051                        | 0.0%            | 0.7%                      | 0.5%                        | 0.8%                     | 0.8%                 | 0.5%                          | 0.2%                | 0.0%                     | 0.6%   |  |
| Share of County's Rural Employment Growth, 2016 to 2051 | 0%              | 25%                       | 18%                         | 7%                       | 29%                  | 17%                           | 5%                  | 0%                       | 100%   |  |

Notes: Figures have been rounded and may not add precisely at the area municipal level. Includes work at home and no fixed place of work.

Source: Watson & Associates Economists Ltd., 2021.



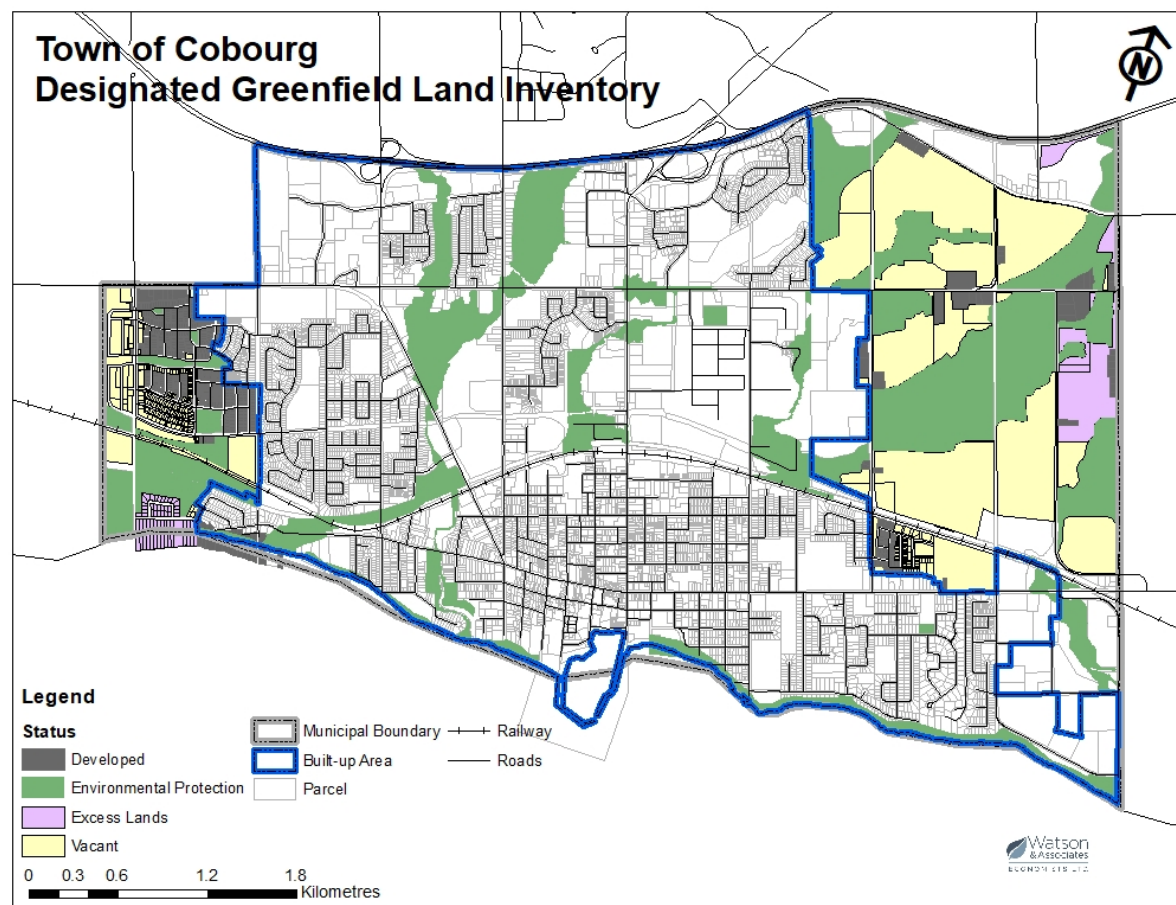
# Appendix G:

## Community Area Land Supply Maps and Tables



# Appendix G: Community Area Land Supply Maps and Tables

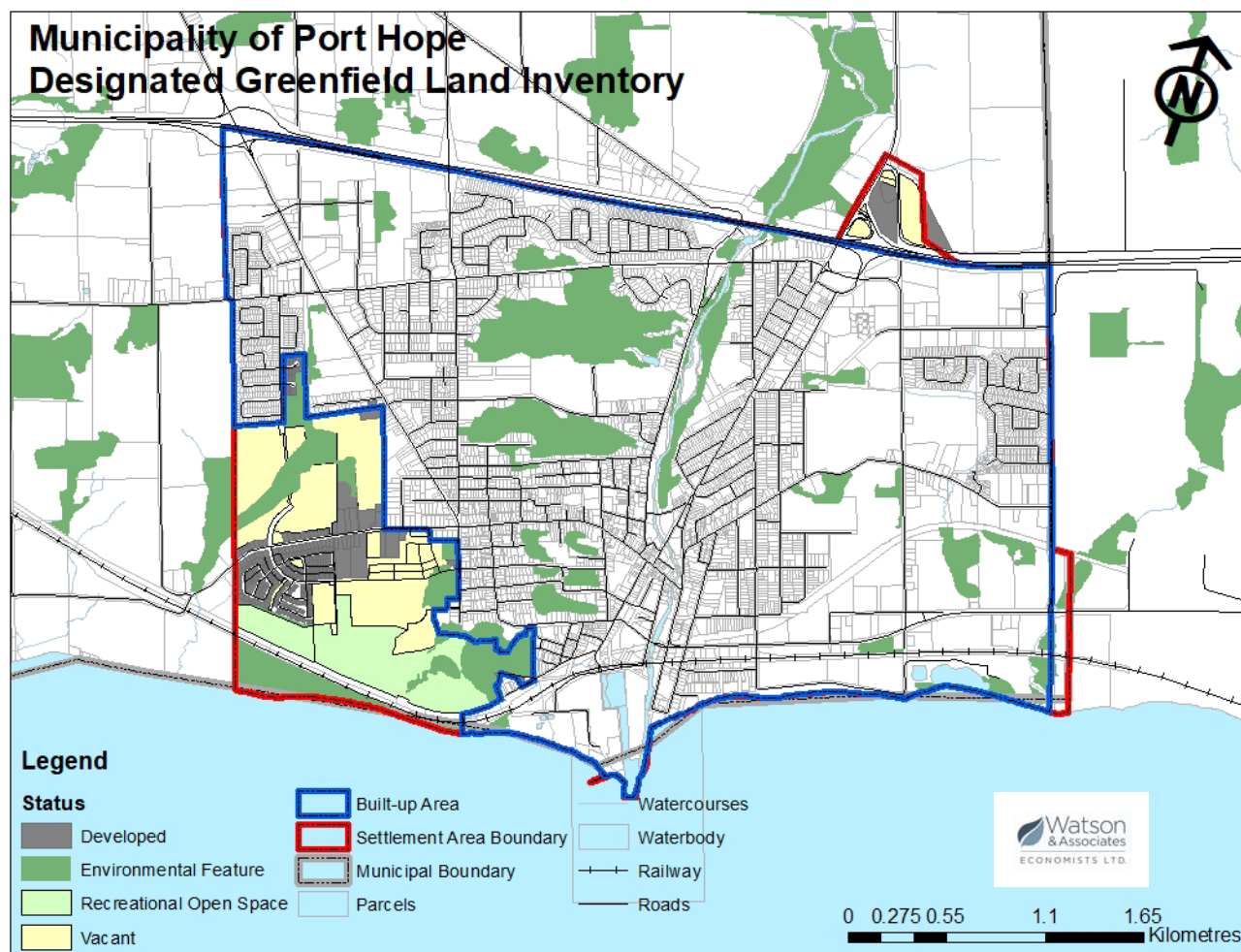
## G.1 Town of Cobourg



Source: Watson & Associates Economists Ltd., 2021.



## G.2 Municipality of Port Hope



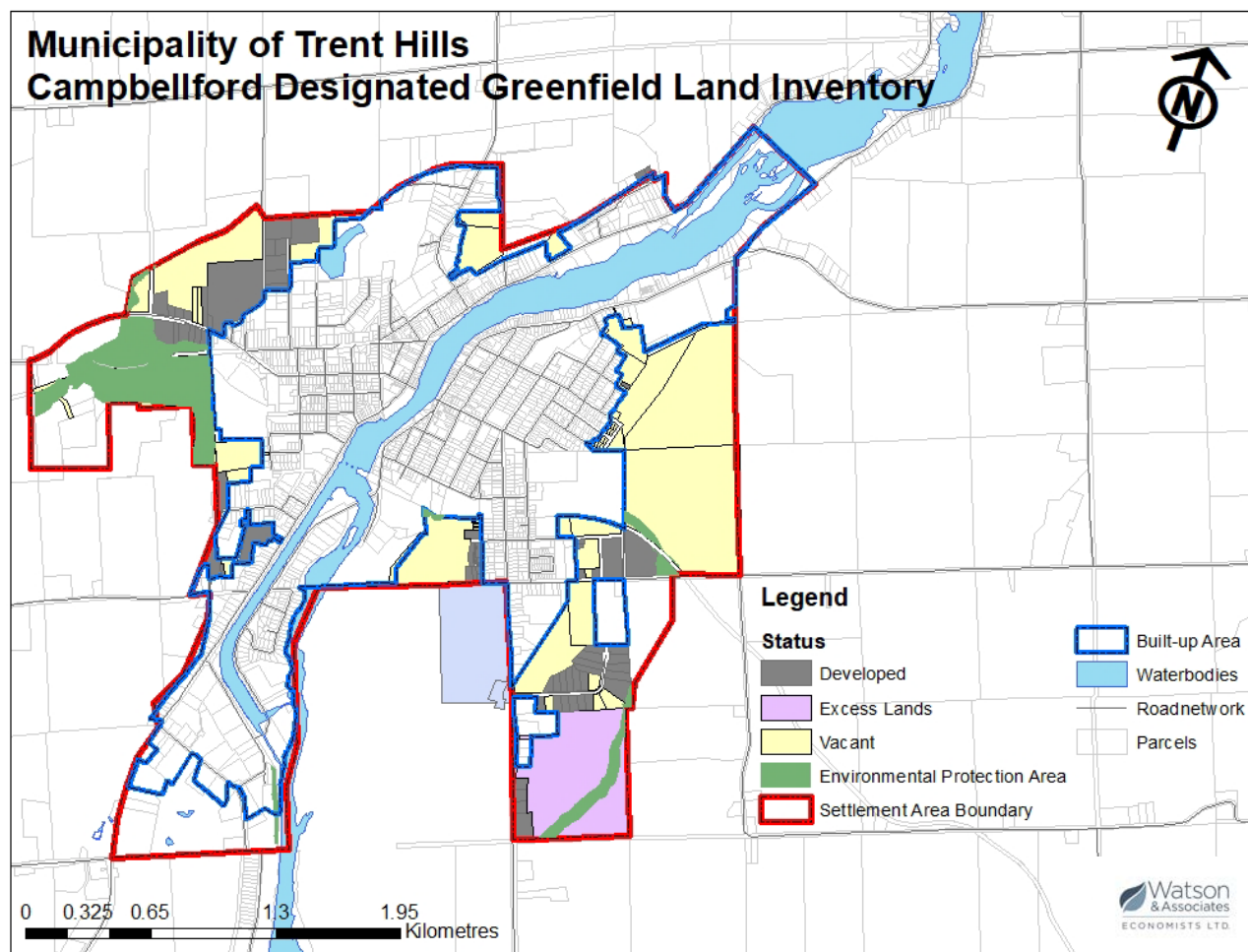
Source: Watson & Associates Economists Ltd., 2021.





### G.3 Municipality of Trent Hills

#### G.3.1 Campbellford Settlement Area



Source: Watson & Associates Economists Ltd., 2021.



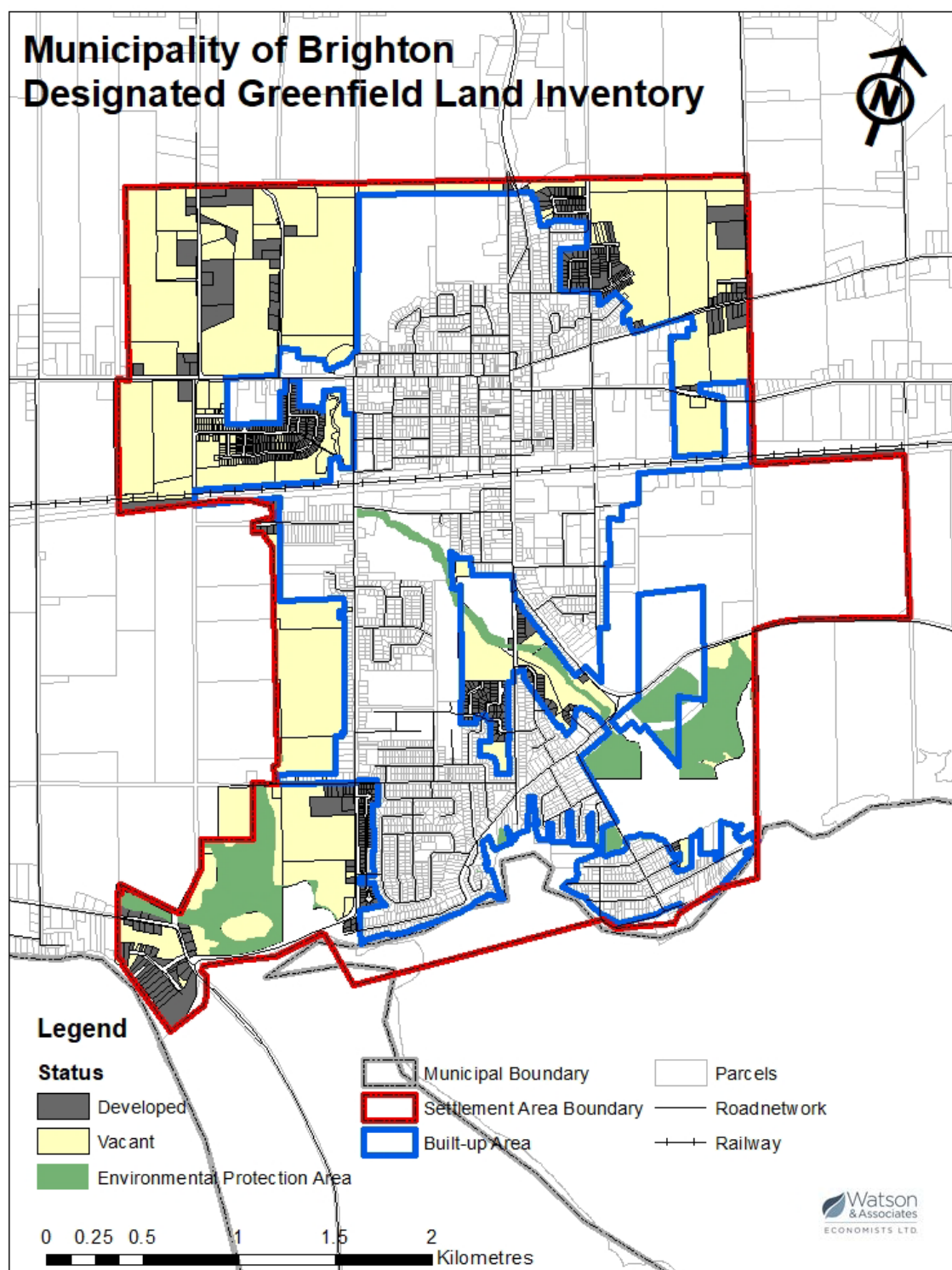
### G.3.2 Hastings Settlement Area



Source: Watson & Associates Economists Ltd., 2021.



## G.4 Municipality of Brighton

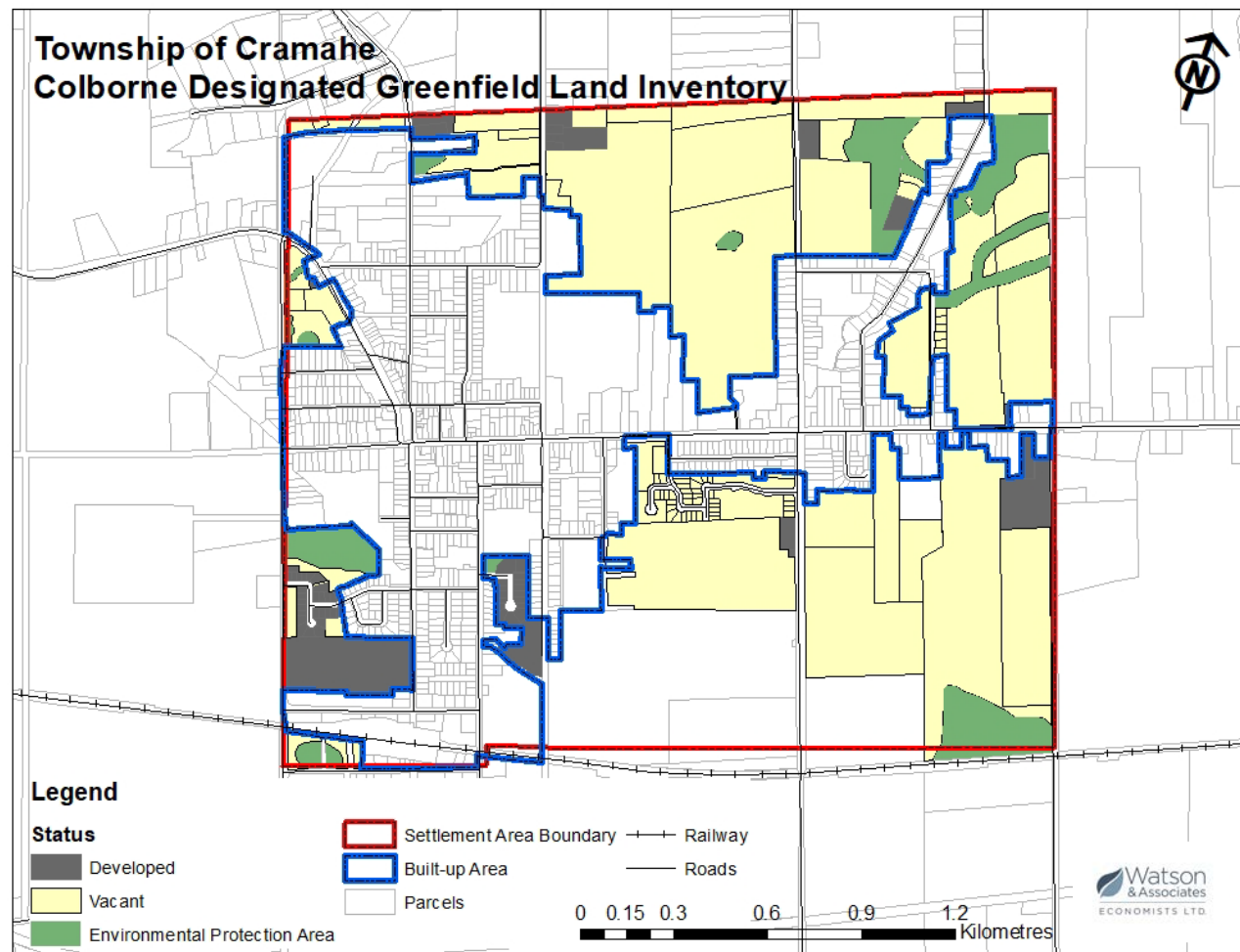


Source: Watson & Associates Economists Ltd., 2021.



## G.5 Township of Cramahe

### G.5.1 Colborne Settlement Area



Source: Watson & Associates Economists Ltd., 2021.



## G.6 Northumberland County

### G.6.1 Community Area Land Supply by Area Municipality by Status

| Area Municipality            | Developed<br>Community<br>Area Lands<br>(Gross<br>Hectares)<br>(A) | Vacant<br>Community<br>Area Lands<br>(Gross<br>Hectares)<br>(B) | Total<br>Developable<br>Community<br>Area Lands<br>(Hectares)<br>(C = A + B) | Share of<br>Developed<br>(D = A / C) | Share of<br>Vacant<br>(E = B / C) |
|------------------------------|--|---|--|--------------------------------------|-----------------------------------|
| Town of Cobourg              | 58   | 267   | 325  | 18%                                  | 82%                               |
| Municipality of Port Hope    | 32   | 39  | 71   | 45%                                  | 55%                               |
| Municipality of Trent Hills  | 22   | 92  | 114  | 19%                                  | 81%                               |
| Campbellford                 | 8  | 180   | 188  | 4%                                   | 96%                               |
| Hastings                     | 14   | 36  | 49   | 28%                                  | 72%                               |
| Municipality of Brighton     | 78   | 305   | 383  | 20%                                  | 80%                               |
| Township of Cramahe          | 21   | 184   | 206  | 10%                                  | 90%                               |
| Colborne                     | 21   | 184   | 206  | 10%                                  | 90%                               |
| <b>Northumberland County</b> | <b>212</b>   | <b>1,010</b>  | <b>1,222</b>   | <b>17%</b>                           | <b>83%</b>                        |

Note: Figures may not add precisely due to rounding. Data current as of September 2020.

Source: Watson & Associates Economists Ltd., 2021.



## G.6.2 Community Area Vacant Land Supply

| Area Municipality                     | Total<br>Approved<br>and Draft<br>Approved <sup>[1]</sup><br>Category 1<br>(A) | People and<br>Jobs Density<br>(people &<br>jobs/hectare)<br>Category 1<br>(B) | Remaining<br>Vacant <sup>[2]</sup><br>Category 2<br>(C = D – A) | Total Vacant<br>D.G.A.<br>Community<br>Areas<br>(D) | % Vacant<br>Category 1<br>(E = A / D) | % Vacant<br>Category 2<br>(F = C / D) |
|---------------------------------------|--|---|---|---|---------------------------------------|---------------------------------------|
| Town of Cobourg                       | 53   | 41  | 214   | 267   | 20%                                   | 80%                                   |
| Municipality of Port Hope             | 31   | 59  | 8   | 39  | 79%                                   | 21%                                   |
| Municipality of Trent Hills           | 67   | 28  | 25  | 92  | 73%                                   | 27%                                   |
| Campbellford                          | 50   | 28  | 130   | 180   | 28%                                   | 72%                                   |
| Hastings                              | 17   | 26  | 18  | 36  | 49%                                   | 51%                                   |
| Municipality of Brighton              | 28   | 32  | 277   | 305   | 9%                                    | 91%                                   |
| Township of Cramahe                   | 29   | 33  | 155   | 184   | 16%                                   | 84%                                   |
| Colborne                              | 29   | 33  | 155   | 184   | 16%                                   | 84%                                   |
| Total Northumberland<br>County D.G.A. | 208  | 36  | 803   | 1,010   | 21%                                   | 79%                                   |

<sup>[1]</sup> Includes land area of active development applications that are registered and unbuilt, and draft plan approved as of September 2020.

<sup>[2]</sup> Includes land area of vacant Community Area lands with no active development applications as of September 2020.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2021.



### G.6.3 Community Area People and Jobs as of 2021

| Area Municipality           | Developed Community Area Lands (Gross ha)<br>(A) | Existing Population on Developed D.G.A. Lands <sup>[1] [2]</sup><br>(B) | Existing Jobs on Developed D.G.A. Lands <sup>[1] [2]</sup><br>(C) | Existing Population and Jobs on Developed D.G.A. Lands <sup>[1] [2]</sup><br>(D = B + C) | Existing Population and Job Density (Gross/ha)<br>(E = D / A) |
|-----------------------------|--|---|---|--|---|
| Town of Cobourg             | 58   | 3,351   | 234   | 3,585  | 62  |
| Municipality of Port Hope   | 32   | 1,062   | 180   | 1,242  | 39  |
| Municipality of Trent Hills | 22   | 289   | 73  | 361  | 17  |
| Campbellford                | 8  | 102   | 29  | 131  | 16  |
| Hastings                    | 14   | 187   | 43  | 230  | 17  |
| Municipality of Brighton    | 78   | 1,458   | 287   | 1,745  | 22  |
| Township of Cramahe         | 21   | 198   | 73  | 271  | 13  |
| Colborne                    | 21   | 198   | 73  | 271  | 13  |
| Northumberland County       | 212  | 6,358   | 847   | 7,205  | 34  |

<sup>[1]</sup> Population based on the following P.P.U.s with a net Census undercount estimated at approximately 2.3%

Low Density (single and semi-detached units): 2.589

Medium Density (townhouses and apartments in duplexes): 2.022

High Density (bachelor, 1-bedroom, 2-bedroom+ apartment units): 1.573

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker assumption of 1 job per 450 sq.ft.

Note: Figures may not add precisely due to rounding. Data current as of September 2020.

Source: Watson & Associates Economists Ltd., 2021.



# Appendix H:

## Community Area Land Needs Analysis by Area Municipality





# Appendix H: Community Area Land Needs Analysis by Area Municipality

## H.1 Town of Cobourg Urban Land Needs Analysis

| Population and Employment Planned for Existing D.G.A. at 2021 |           |
|---|-----------|
| Population <sup>[1]</sup>                                     | 3,351     |
| Community Area Employment <sup>[2]</sup>                      | 234       |
| Total Population and Employment                               | 3,585     |
| Existing Gross Land Area (ha) <sup>[3]</sup>                  | 58        |
| <b>People and Jobs Density per ha</b>                         | <b>62</b> |

| Population and Employment Planned for Existing D.G.A. 2051 |           |
|--|-----------|
| Population <sup>[1]</sup>                                  | 12,241    |
| Community Area Employment <sup>[2]</sup>                   | 3,018     |
| Total Population and Employment                            | 15,259    |
| Existing Gross Land Area (ha) <sup>[3]</sup>               | 285       |
| <b>People and Jobs Density per ha</b>                      | <b>54</b> |

| Population and Employment Planned for Existing D.G.A. 2021-2051 |           |
|---|-----------|
| Population <sup>[1]</sup>                                       | 8,890     |
| Community Area Employment <sup>[2]</sup>                        | 2,783     |
| Total Population and Employment                                 | 11,673    |
| Land Demand   | 227       |
| <b>People and Jobs Density per ha</b>                           | <b>52</b> |

| Land Need                               | 2051      |
|---|-----------|
| Community Area Land Supply              | 364       |
| Community Area Land Demand              | 285       |
| <b>Community Area Land Surplus (ha)</b> | <b>80</b> |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 102.3%.

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker (F.S.W.) assumption of 1 job per 450 sq.ft.

<sup>[3]</sup> Gross Land Area in accordance with the Growth Plan, 2019 Developable Land Area.

Source: Watson & Associates Economists Ltd., 2021.



## H.2 Municipality of Port Hope Urban Land Needs Analysis

| Population and Employment Planned for Existing D.G.A. at 2021 |           |
|---|-----------|
| Population <sup>[1]</sup>                                     | 1,062     |
| Community Area Employment <sup>[2]</sup>                      | 180       |
| Total Population and Employment                               | 1,242     |
| Existing Gross Land Area (ha) <sup>[3]</sup>                  | 32        |
| <b>People and Jobs Density per ha</b>                         | <b>39</b> |

| Population and Employment Planned for Existing D.G.A. 2051 |           |
|--|-----------|
| Population <sup>[1]</sup>                                  | 7,691     |
| Community Area Employment <sup>[2]</sup>                   | 1,512     |
| Total Population and Employment                            | 9,203     |
| Existing Gross Land Area (ha) <sup>[3]</sup>               | 203       |
| <b>People and Jobs Density per ha</b>                      | <b>45</b> |

| Population and Employment Planned for Existing D.G.A. 2021-2051 |           |
|---|-----------|
| Population <sup>[1]</sup>                                       | 6,629     |
| Community Area Employment <sup>[2]</sup>                        | 1,332     |
| Total Population and Employment                                 | 7,961     |
| Land Demand   | 171       |
| <b>People and Jobs Density per ha</b>                           | <b>47</b> |

| Land Need                               | 2051        |
|---|-------------|
| Community Area Land Supply              | 71          |
| Community Area Land Demand              | 203         |
| <b>Community Area Land Deficit (ha)</b> | <b>-131</b> |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 102.3%.

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker (F.S.W.) assumption of 1 job per 450 sq.ft.

<sup>[3]</sup> Gross Land Area in accordance with the Growth Plan, 2019 Developable Land Area.

Source: Watson & Associates Economists Ltd., 2021.



## H.3 Municipality of Trent Hills Urban Land Needs Analysis

### H.3.1 Campbellford Urban Land Needs Analysis

| Population and Employment Planned for Existing D.G.A. at 2021 |           |
|---|-----------|
| Population <sup>[1]</sup>                                     | 102       |
| Community Area Employment <sup>[2]</sup>                      | 29        |
| Total Population and Employment                               | 131       |
| Existing Gross Land Area (ha) <sup>[3]</sup>                  | 8         |
| <b>People and Jobs Density per ha</b>                         | <b>16</b> |

| Population and Employment Planned for Existing D.G.A. 2051 |           |
|--|-----------|
| Population <sup>[1]</sup>                                  | 1,355     |
| Community Area Employment <sup>[2]</sup>                   | 345       |
| Total Population and Employment                            | 1,700     |
| Existing Gross Land Area (ha) <sup>[3]</sup>               | 64        |
| <b>People and Jobs Density per ha</b>                      | <b>27</b> |

| Population and Employment Planned for Existing D.G.A. 2021-2051 |           |
|---|-----------|
| Population <sup>[1]</sup>                                       | 1,253     |
| Community Area Employment <sup>[2]</sup>                        | 315       |
| Total Population and Employment                                 | 1,568     |
| Land Demand   | 56        |
| <b>People and Jobs Density per ha</b>                           | <b>28</b> |

| Land Need                               | 2051       |
|---|------------|
| Community Area Land Supply              | 188        |
| Community Area Land Demand              | 64         |
| <b>Community Area Land Surplus (ha)</b> | <b>124</b> |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 102.3%.

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker (F.S.W.) assumption of 1 job per 450 sq.ft.

<sup>[3]</sup> Gross Land Area in accordance with the Growth Plan, 2019 Developable Land Area.

Source: Watson & Associates Economists Ltd., 2021.



### H.3.2 Hastings Urban Land Needs Analysis

| Population and Employment Planned for Existing D.G.A. at 2021 |           |
|---|-----------|
| Population <sup>[1]</sup>                                     | 187       |
| Community Area Employment <sup>[2]</sup>                      | 43        |
| Total Population and Employment                               | 230       |
| Existing Gross Land Area (ha) <sup>[3]</sup>                  | 14        |
| <b>People and Jobs Density per ha</b>                         | <b>16</b> |

| Population and Employment Planned for Existing D.G.A. 2021-2051 |           |
|---|-----------|
| Population <sup>[1]</sup>                                       | 1,142     |
| Community Area Employment <sup>[2]</sup>                        | 103       |
| Total Population and Employment                                 | 1,245     |
| Land Demand   | 42        |
| <b>People and Jobs Density per ha</b>                           | <b>30</b> |

| Population and Employment Planned for Existing D.G.A. 2051 |           |
|--|-----------|
| Population <sup>[1]</sup>                                  | 1,329     |
| Community Area Employment <sup>[2]</sup>                   | 147       |
| Total Population and Employment                            | 1,476     |
| Existing Gross Land Area (ha) <sup>[3]</sup>               | 56        |
| <b>People and Jobs Density per ha</b>                      | <b>26</b> |

| Land Need                               | 2051      |
|---|-----------|
| Community Area Land Supply              | 49        |
| Community Area Land Demand              | 56        |
| <b>Community Area Land Deficit (ha)</b> | <b>-7</b> |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 102.3%

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker (F.S.W.) assumption of 1 job per 450 sq.ft.

<sup>[3]</sup> Gross Land Area in accordance with the Growth Plan, 2019 Developable Land Area.

Source: Watson & Associates Economists Ltd., 2021.



## H.4 Municipality of Brighton Urban Land Needs Analysis

| Population and Employment Planned for Existing D.G.A. at 2021 |           |
|---|-----------|
| Population <sup>[1]</sup>                                     | 1,458     |
| Community Area Employment <sup>[2]</sup>                      | 287       |
| Total Population and Employment                               | 1,745     |
| Existing Gross Land Area (ha) <sup>[3]</sup>                  | 78        |
| <b>People and Jobs Density per ha</b>                         | <b>22</b> |

| Population and Employment Planned for Existing D.G.A. 2051 |           |
|--|-----------|
| Population <sup>[1]</sup>                                  | 4,695     |
| Community Area Employment <sup>[2]</sup>                   | 571       |
| Total Population and Employment                            | 5,266     |
| Existing Gross Land Area (ha) <sup>[3]</sup>               | 190       |
| <b>People and Jobs Density per ha</b>                      | <b>28</b> |

| Population and Employment Planned for Existing D.G.A. 2021-2051 |           |
|---|-----------|
| Population <sup>[1]</sup>                                       | 3,237     |
| Community Area Employment <sup>[2]</sup>                        | 284       |
| Total Population and Employment                                 | 3,521     |
| Land Demand   | 112       |
| <b>People and Jobs Density per ha</b>                           | <b>31</b> |

| Land Need                               | 2051       |
|---|------------|
| Community Area Land Supply              | 383        |
| Community Area Land Demand              | 190        |
| <b>Community Area Land Surplus (ha)</b> | <b>193</b> |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 102.3%.

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker (F.S.W.) assumption of 1 job per 450 sq.ft.

<sup>[3]</sup> Gross Land Area in accordance with the Growth Plan, 2019 Developable Land Area.

Source: Watson & Associates Economists Ltd., 2021.



## H.5 Township of Cramahe Urban Land Needs Analysis

### H.5.1 Colborne Urban Land Needs Analysis

| Population and Employment Planned for Existing D.G.A. at 2021 |           |
|---|-----------|
| Population <sup>[1]</sup>                                     | 198       |
| Community Area Employment <sup>[2]</sup>                      | 73        |
| Total Population and Employment                               | 271       |
| Existing Gross Land Area (ha) <sup>[3]</sup>                  | 21        |
| <b>People and Jobs Density per ha</b>                         | <b>13</b> |

| Population and Employment Planned for Existing D.G.A. 2051 |           |
|--|-----------|
| Population <sup>[1]</sup>                                  | 1,384     |
| Community Area Employment <sup>[2]</sup>                   | 126       |
| Total Population and Employment                            | 1,511     |
| Existing Gross Land Area (ha) <sup>[3]</sup>               | 64        |
| <b>People and Jobs Density per ha</b>                      | <b>24</b> |

| Population and Employment Planned for Existing D.G.A. 2021-2051 |           |
|---|-----------|
| Population <sup>[1]</sup>                                       | 1,186     |
| Community Area Employment <sup>[2]</sup>                        | 53        |
| Total Population and Employment                                 | 1,240     |
| Land Demand   | 43        |
| <b>People and Jobs Density per ha</b>                           | <b>29</b> |

| Land Need                               | 2051       |
|---|------------|
| Community Area Land Supply              | 206        |
| Community Area Land Demand              | 64         |
| <b>Community Area Land Surplus (ha)</b> | <b>142</b> |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 102.3%.

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker (F.S.W.) assumption of 1 job per 450 sq.ft.

<sup>[3]</sup> Gross Land Area in accordance with the Growth Plan, 2019 Developable Land Area.

Source: Watson & Associates Economists Ltd., 2021.



## H.5 Northumberland County Urban Land Needs Analysis

| Population and Employment Planned for Existing D.G.A. at 2021 |           |
|---|-----------|
| Population <sup>[1]</sup>                                     | 6,358     |
| Community Area Employment <sup>[2]</sup>                      | 847       |
| Total Population and Employment                               | 7,205     |
| Existing Gross Land Area (ha) <sup>[3]</sup>                  | 211       |
| <b>People and Jobs Density per ha</b>                         | <b>34</b> |

| Population and Employment Planned for Existing D.G.A. 2021-2051 |           |
|---|-----------|
| Population <sup>[1]</sup>                                       | 22,338    |
| Community Area Employment <sup>[2]</sup>                        | 4,872     |
| Total Population and Employment                                 | 27,209    |
| Land Demand   | 650       |
| <b>People and Jobs Density per ha</b>                           | <b>42</b> |

| Population and Employment Planned for Existing D.G.A. 2051 |           |
|--|-----------|
| Population <sup>[1]</sup>                                  | 28,696    |
| Community Area Employment <sup>[2]</sup>                   | 5,718     |
| Total Population and Employment                            | 34,414    |
| Existing Gross Land Area (ha) <sup>[3]</sup>               | 861       |
| <b>People and Jobs Density per ha</b>                      | <b>40</b> |

| Land Need                               | 2051       |
|---|------------|
| Community Area Land Supply              | 1,261      |
| Community Area Land Demand              | 861        |
| <b>Community Area Land Surplus (ha)</b> | <b>400</b> |

<sup>[1]</sup> Population includes net Census undercount estimated at approximately 102.3%.

<sup>[2]</sup> Employment calculated from desktop review of developed community lands and applied a floor space per worker (F.S.W.) assumption of 1 job per 450 sq.ft.

<sup>[3]</sup> Gross Land Area in accordance with the Growth Plan, 2019 Developable Land Area.

Source: Watson & Associates Economists Ltd., 2021.



# Appendix I:

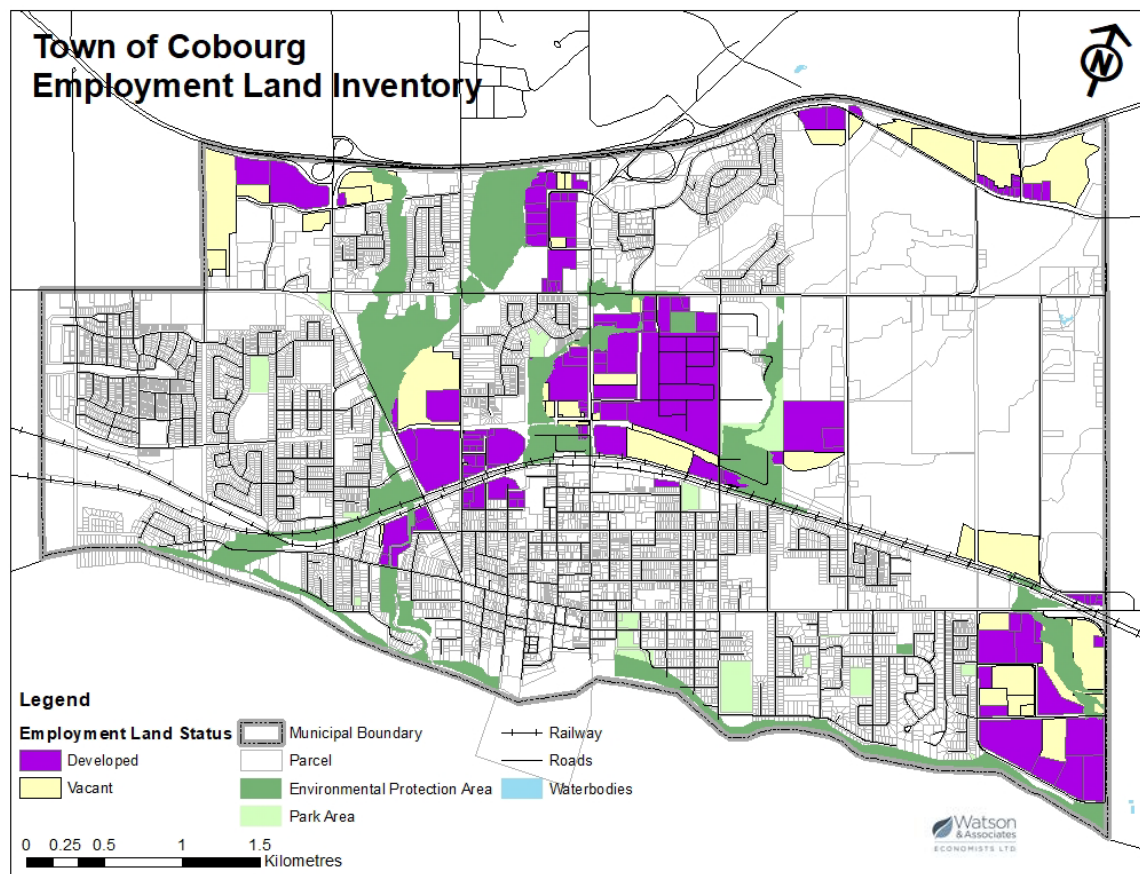
## Urban Employment Area Land Supply Maps and Tables





# Appendix I: Urban Employment Area Land Supply Maps and Tables

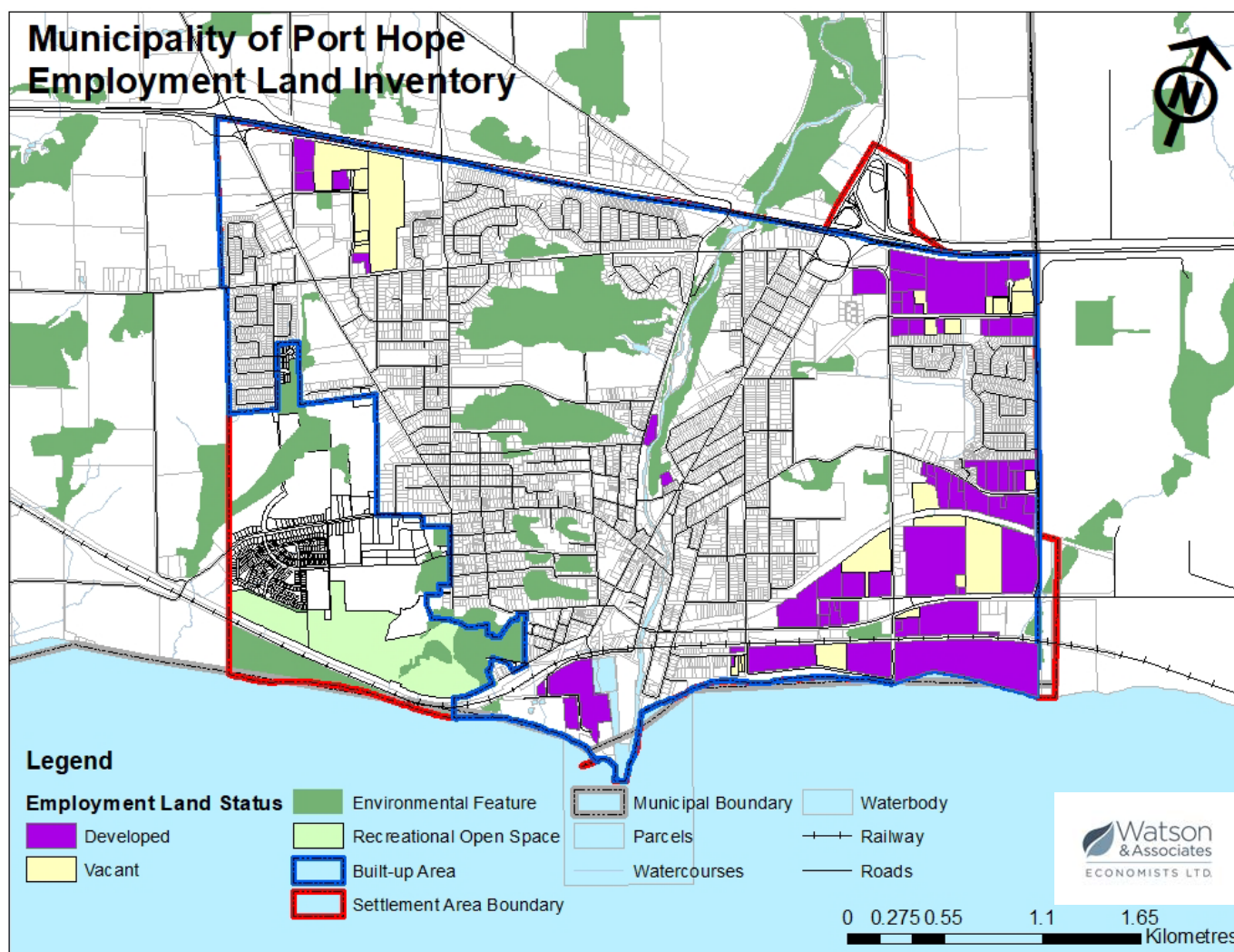
## I.1 Town of Cobourg



Source: Watson & Associates Economists Ltd., 2021.



## I.2 Municipality of Port Hope

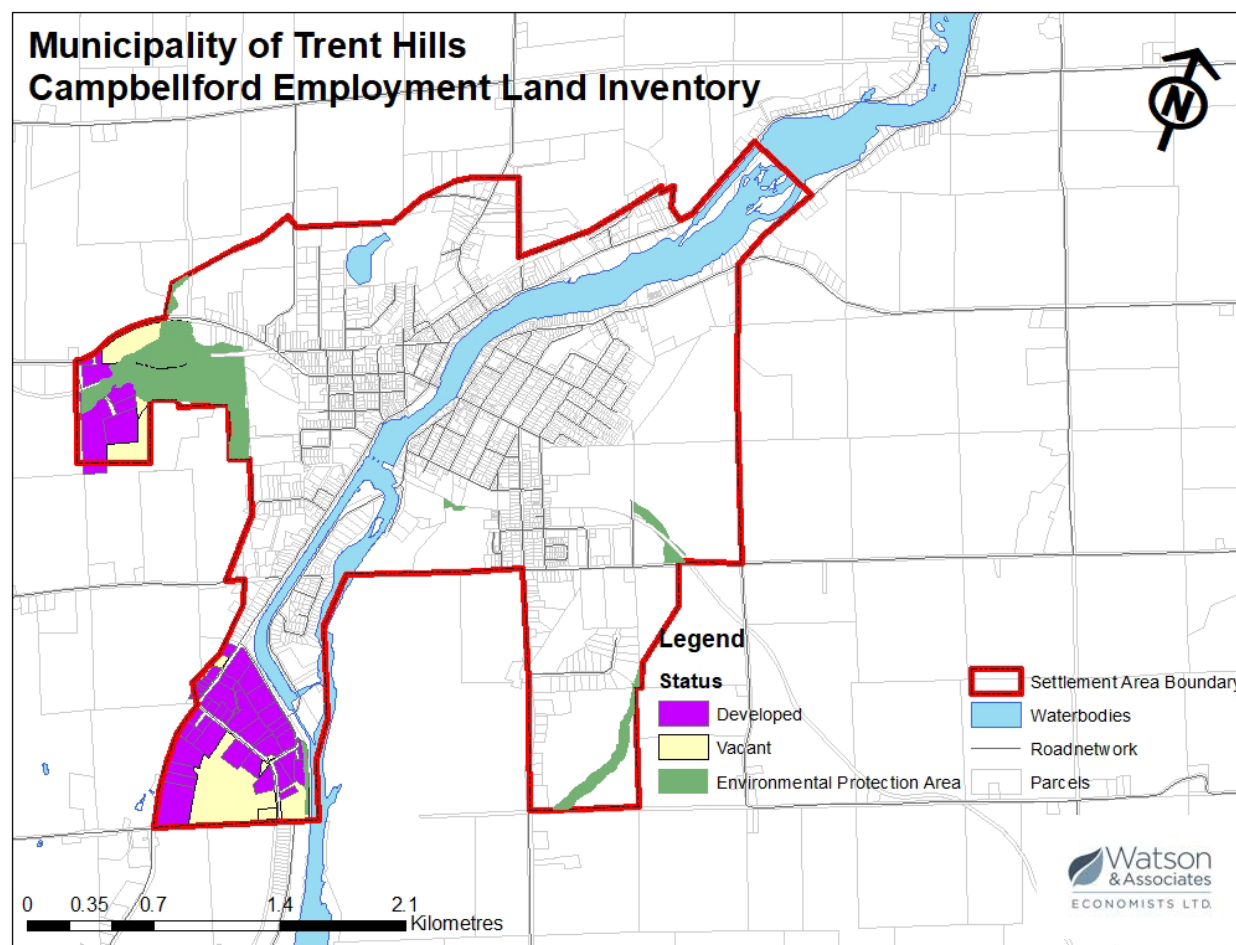


Source: Watson & Associates Economists Ltd., 2021.



### I.3 Municipality of Trent Hills

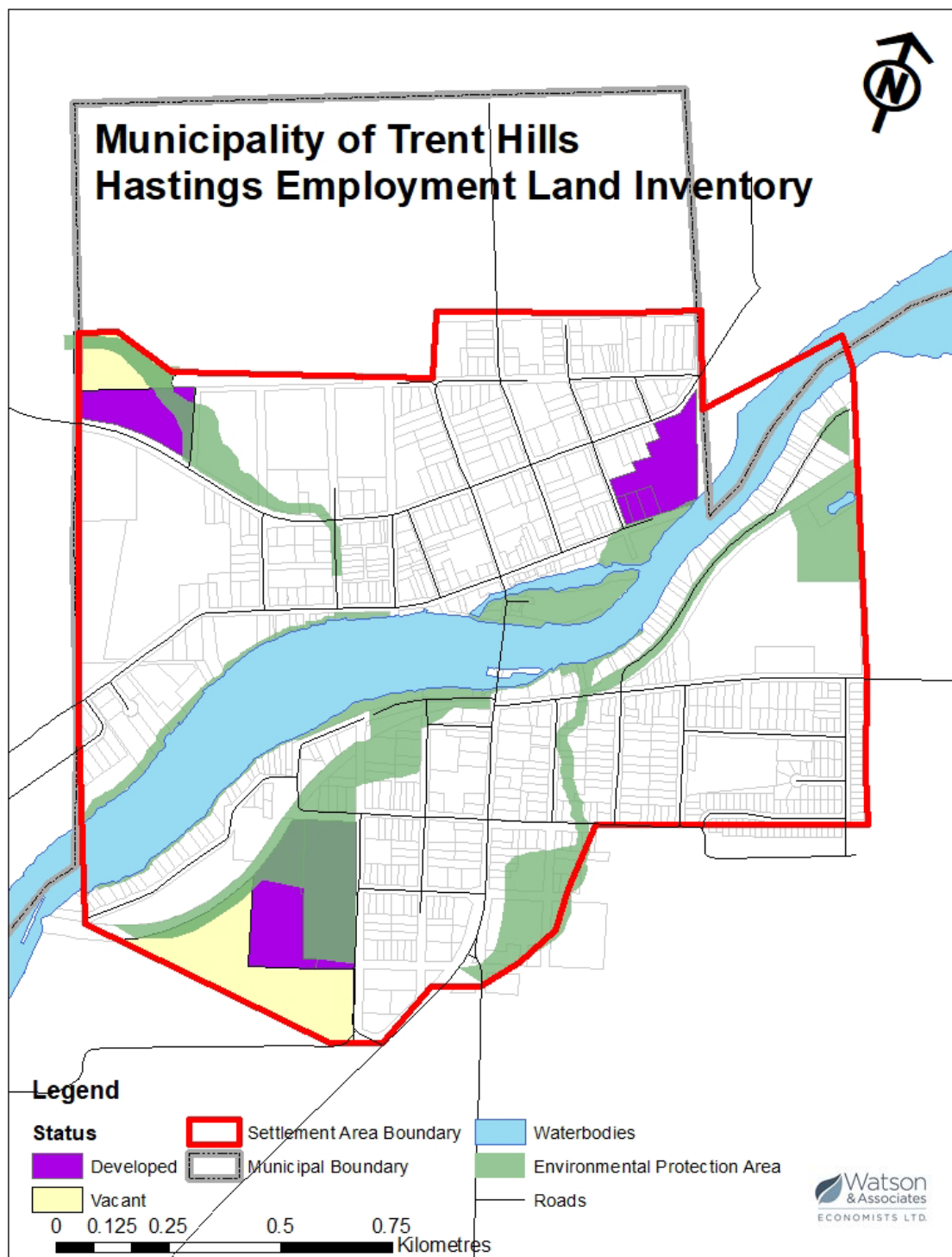
#### I.3.1 Campbellford Settlement Area



Source: Watson & Associates Economists Ltd., 2021.



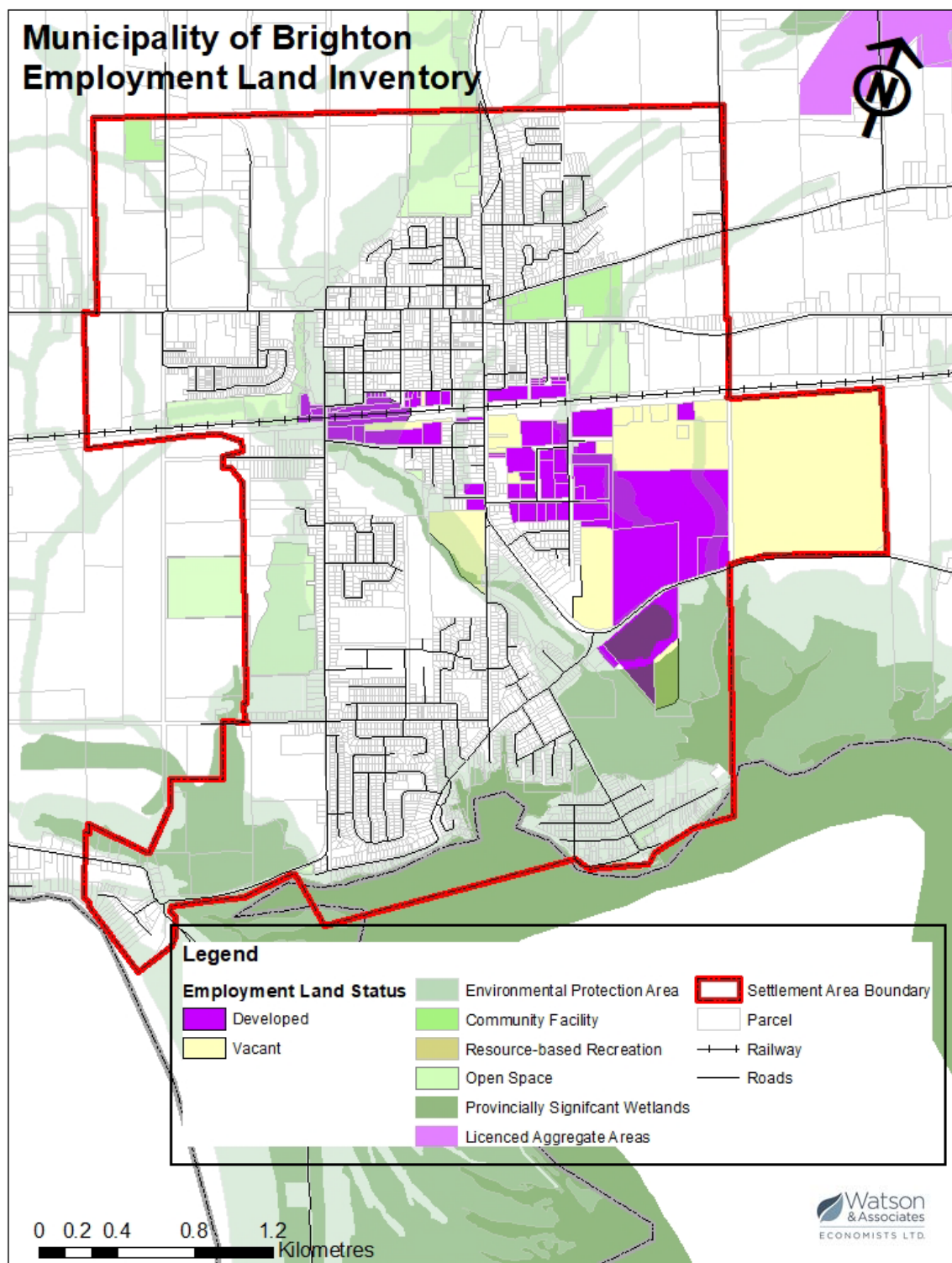
### 1.3.2 Hastings Settlement Area



Source: Watson & Associates Economists Ltd., 2021.



## I.4 Municipality of Brighton



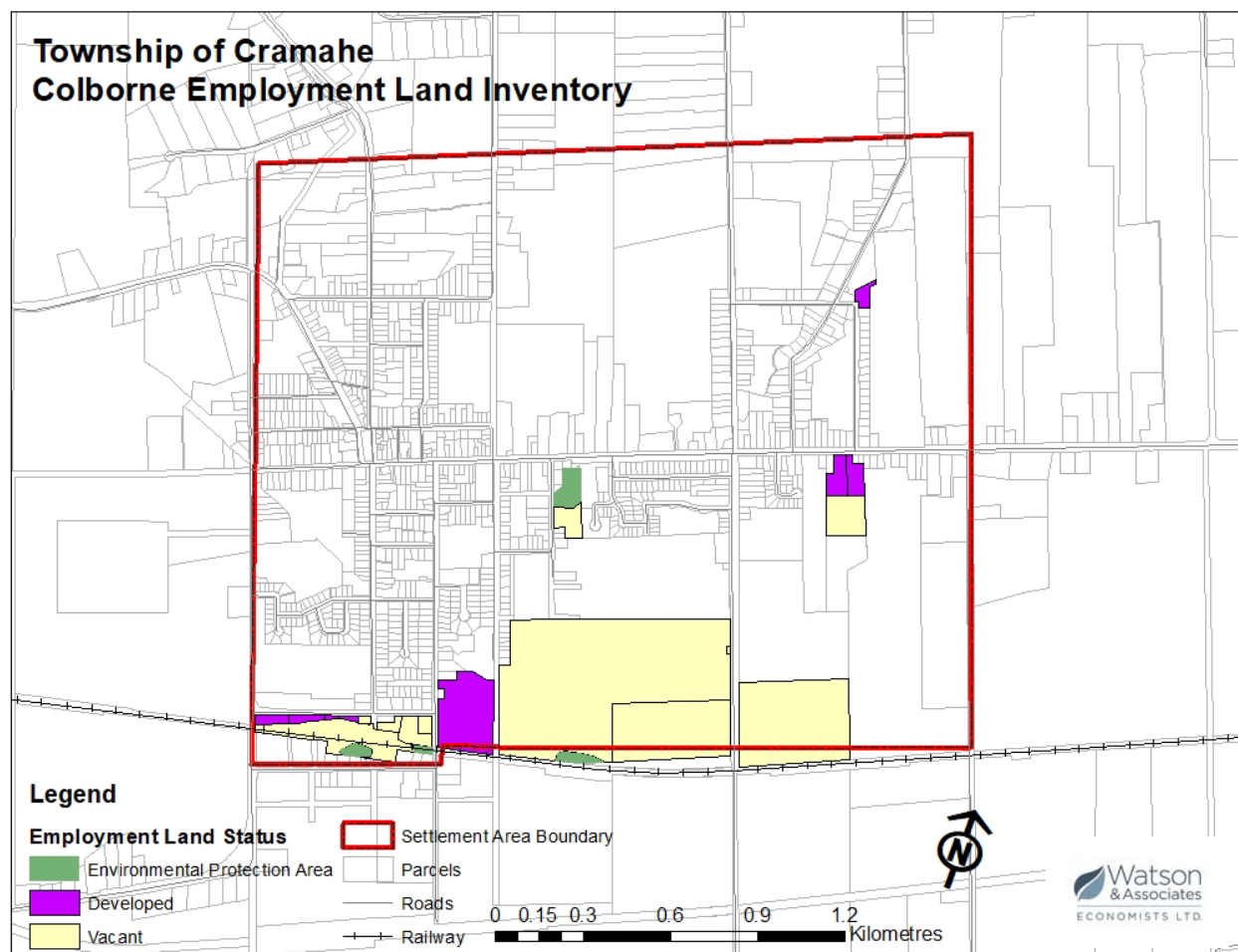
Source: Watson & Associates Economists Ltd., 2021





## I.5 Township of Cramahe

### I.5.1 Colborne Settlement Area



Source: Watson & Associates Economists Ltd., 2021.



## I.6 Urban Employment Area Land Supply

| Area Municipality           | Developed Urban<br>Employment Lands<br>(Hectares)<br>(A) | Vacant Urban<br>Employment Lands<br>(Hectares)<br>(B) | Total Urban<br>Employment Lands<br>(Hectares)<br>(C = A + B) |
|-----------------------------|--|---|--|
| Town of Cobourg             | 205  | 121   | 326  |
| Municipality of Port Hope   | 101  | 45  | 146  |
| Municipality of Trent Hills | 60   | 31  | 92   |
| Campbellford                | 53   | 24  | 77   |
| Hastings                    | 8  | 7   | 15   |
| Municipality of Brighton    | 83   | 72  | 156  |
| Township of Cramahe         | 8  | 56  | 64   |
| Colborne                    | 8  | 56  | 64   |
| Northumberland County       | 457  | 326   | 783  |

Note: Figures may not add precisely due to rounding. Figures exclude environmental features.

Source: Watson & Associates Economists Ltd., 2021.



# Appendix J:

## Urban Employment Area Land Needs Analysis by Area Municipality





## Appendix J: Urban Employment Area Land Needs Analysis by Area Municipality

### J.1 Urban Employment Area Land at 2021

| Area Municipality           | Gross Developed Urban Employment Land (Hectares)<br>(A) | Total Employment<br>(B) | Gross Density Jobs per ha<br>(C = B / A) | Share of Urban Employment Area Growth (%) |
|-----------------------------|---|-------------------------|--|---|
| Town of Cobourg             | 205   | 4,910                   | 24                                       | 52%                                       |
| Municipality of Port Hope   | 101   | 2,232                   | 22                                       | 23%                                       |
| Municipality of Trent Hills | 60  | 880                     | 15                                       | 9%  |
| Campbellford                | 53  | 755                     | 14                                       | 8%  |
| Hastings                    | 8   | 126                     | 17                                       | 1%  |
| Municipality of Brighton    | 83  | 1,428                   | 17                                       | 15%                                       |
| Township of Cramahe         | 8   | 79                      | 10                                       | 1%  |
| Colborne                    | 8   | 79                      | 10                                       | 1%  |
| Northumberland County       | 457   | 9,529                   | 21                                       | 100%                                      |

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2021.



## J.2 Urban Employment Area Growth, 2021 to 2051

| Area Municipality           | Gross Urban Employment Land Demand (Hectares)<br>(A) | Total Employment<br>(B) | Intensification Adjustments (Hectares)<br>(C = B x 10%) | Total Employment Net of Intensification<br>(D = B - C) | Gross Density Jobs per Hectare<br>(E = D / A) | Share of Urban Employment Area Growth (%) |
|-----------------------------|--|-------------------------|---|--|---|---|
| Town of Cobourg             | 98   | 1,950                   | 195   | 1,755  | 18  | 41%                                       |
| Municipality of Port Hope   | 92   | 1,840                   | 184   | 1,656  | 18  | 38%                                       |
| Municipality of Trent Hills | 48   | 700                     | 70  | 630  | 13  | 15%                                       |
| Campbellford                | 48   | 700                     | 70  | 630  | 13  | 15%                                       |
| Hastings                    | 0  | 0                       | 0   | 0  | -   | 0%  |
| Municipality of Brighton    | 17   | 300                     | 30  | 270  | 16  | 6%  |
| Township of Cramahe         | 3  | 40                      | 4   | 36   | 12  | 1%  |
| Colborne                    | 3  | 40                      | 4   | 36   | 12  | 1%  |
| Northumberland County       | 258  | 4,830                   | 483   | 4,329  | 17  | 100%                                      |

Note: Figures may not add precisely due to rounding.  
Source: Watson & Associates Economists Ltd., 2021.



## J.2 Urban Employment Land Needs at 2051

| Urban Employment Area at 2051   | Equation                  | Cobourg | Port Hope | Campbellford | Hastings | Brighton | Colborne | Northumberland County |
|---|---------------------------|---------|-----------|--------------|----------|----------|----------|-----------------------|
| Employment at 2051  | A                         | 6,860   | 4,072     | 1,580        | -        | 1,728    | 119      | 14,359                |
| Employment at 2051, Adjusted for Intensification                      | B                         | 6,665   | 3,888     | 1,510        | -        | 1,698    | 115      | 13,876                |
| Employment Density (jobs/ha)  | C                         | 22      | 20        | 15           | -        | 17       | 11       | 20                    |
| Employment Land Demand at 2051 (ha)                                   | $D = B / C$               | 302     | 193       | 101          | -        | 100      | 11       | 708                   |
| Employment Land Demand Adjusted for Market Contingencies at 2051 (ha) | $E = D + (D \times 10\%)$ | 332     | 213       | 111          | 0        | 110      | 12       | 778                   |
| Total Designated Employment Land Supply (ha)                          | F                         | 326     | 146       | 77           | 15       | 181      | 64       | 810                   |
| Adjustments to Employment Land Supply                                 | G                         | -       | -         | -            | -        | 26       | -        | 26                    |
| Potential Employment Conversions (ha)                                 | H                         | -       | -         | -            | 15       | 5        | -        | 20                    |
| Adjusted Designated Employment Land Supply                            | $I = F - (G + H)$         | 326     | 146       | 77           | 0        | 151      | 64       | 763                   |
| Total Designated Employment Land Supply (ha), Adjusted for Vacancy    | J                         | 302     | 137       | 72           | 0        | 136      | 52       | 700                   |
| Employment Area Surplus/(Deficit)                                     | $K = I - E$               | -31     | -75       | -39          | 0        | 26       | 41       | -79                   |

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2021.



# Appendix K:

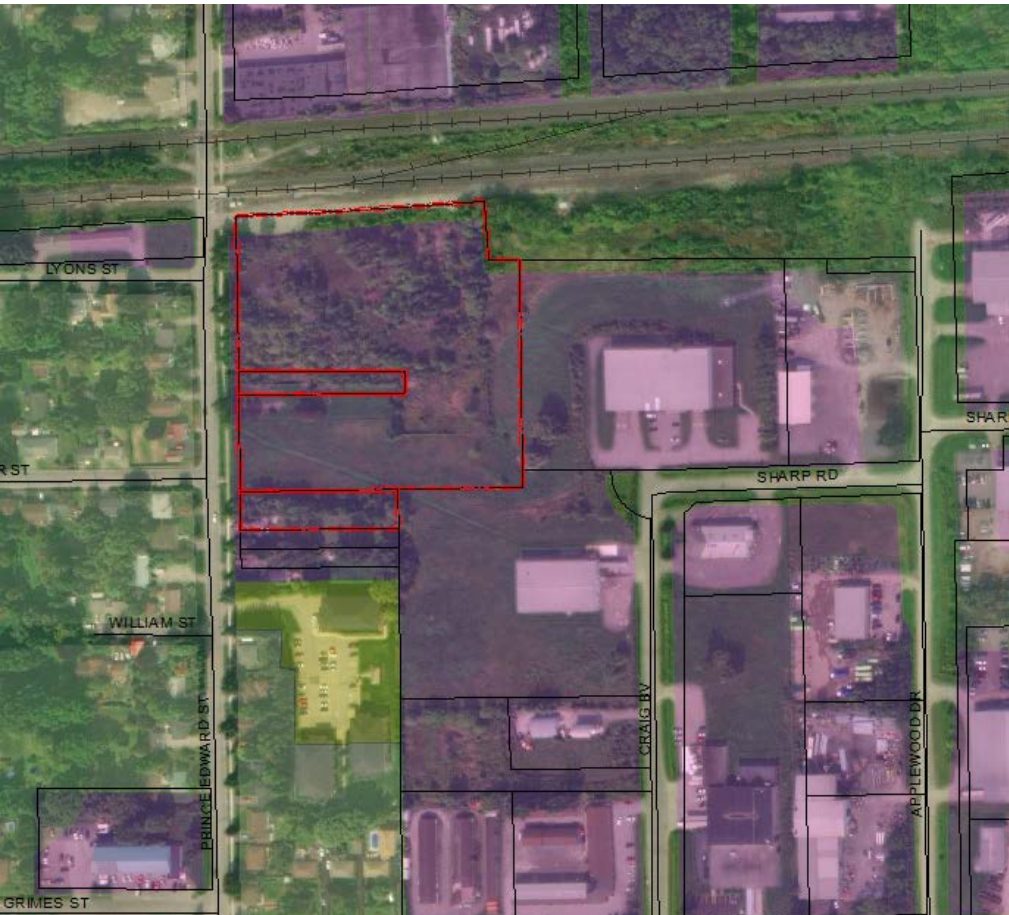
## Urban Employment Area Conversions



# Appendix K: Urban Employment Area Land Conversions

## K.1 Municipality of Brighton

### K.1.1 93,99,109 Prince Edward Street



|                |                                  |
|----------------|----------------------------------|
| Area           | Brighton                         |
| Size:          | 3.05 ha                          |
| Location       | Built-Up Area                    |
| Status         | Vacant                           |
| Recommendation | Convert to Residential/Mixed Use |

| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | X |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | X |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | X |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible with surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality's overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |





K.1.2 113 & 115 Prince Edward Street

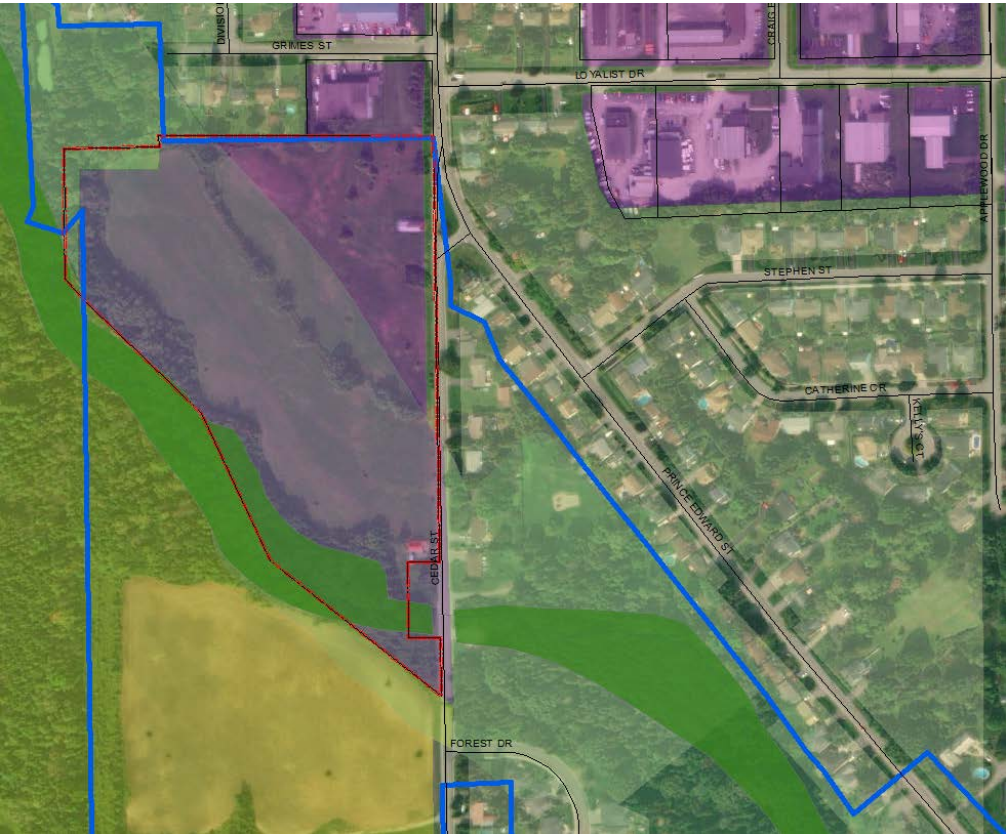


|                |                                  |
|----------------|----------------------------------|
| Area           | Brighton                         |
| Size:          | 0.23 ha                          |
| Location       | Built-Up Area                    |
| Status         | Occupied                         |
| Recommendation | Convert to Residential/Mixed-Use |

| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | √ |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | √ |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | √ |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible with surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality’s overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |



K.1.3 0 Cedar Street



|                |                                  |
|----------------|----------------------------------|
| Area           | Brighton                         |
| Size:          | 1.81 ha                          |
| Location       | Designated Greenfield Area       |
| Status         | Vacant                           |
| Recommendation | Convert to Residential/Mixed-Use |

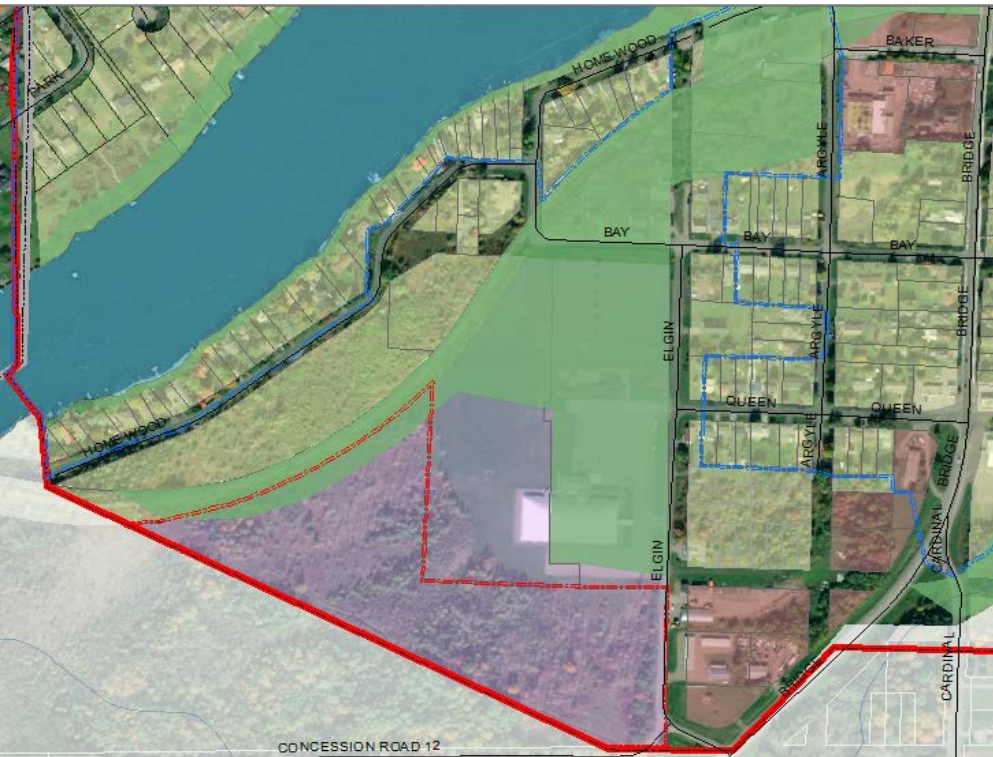
| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | √ |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | √ |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | √ |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible with surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality’s overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |





K.2 Municipality of Trent Hills

K.2.1 Elgin Street



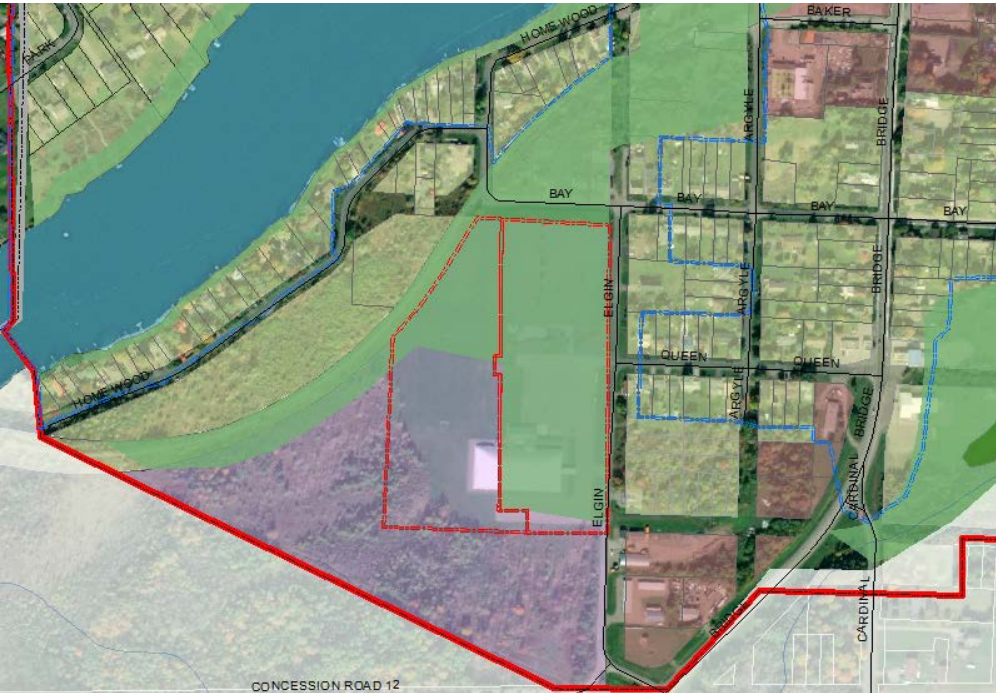
|                |                                  |
|----------------|----------------------------------|
| Area           | Trent Hills – Hastings           |
| Size:          | 5.99 ha                          |
| Location       | Designated Greenfield Area       |
| Status         | Vacant                           |
| Recommendation | Convert to Residential/Mixed-Use |

| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | √ |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | √ |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | √ |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality’s overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |





K.2.2 Elgin Street



|                |                                  |
|----------------|----------------------------------|
| Area           | Trent Hills – Hastings           |
| Size:          | 2.42 ha                          |
| Location       | Designated Greenfield Area       |
| Status         | Occupied                         |
| Recommendation | Convert to Residential/Mixed-Use |

| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | √ |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | √ |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | √ |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible with surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality’s overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |



K.2.2 73, 79, 94 Front Street East



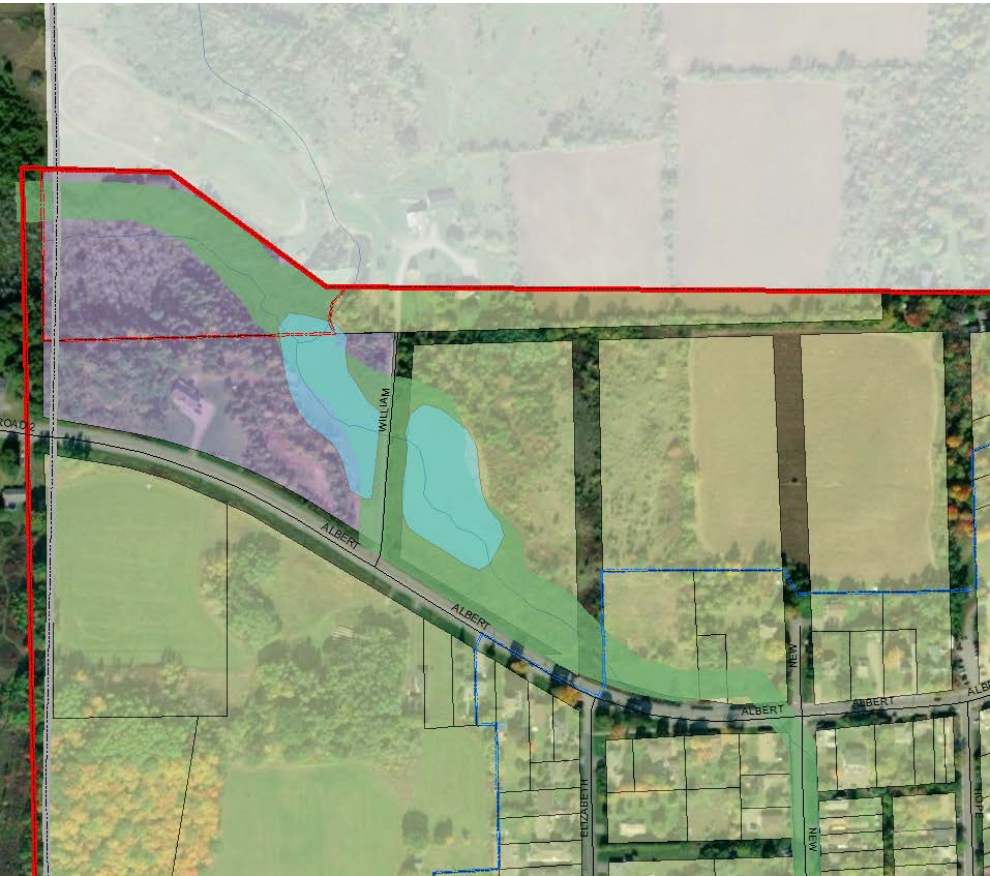
|                |                                  |
|----------------|----------------------------------|
| Area           | Trent Hills – Hastings           |
| Size:          | 3.1 ha                           |
| Location       | Built-Up Area                    |
| Status         | Occupied                         |
| Recommendation | Convert to Residential/Mixed-Use |

| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | √ |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | √ |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | √ |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible with surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality’s overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |





K.2.3 Albert Street West



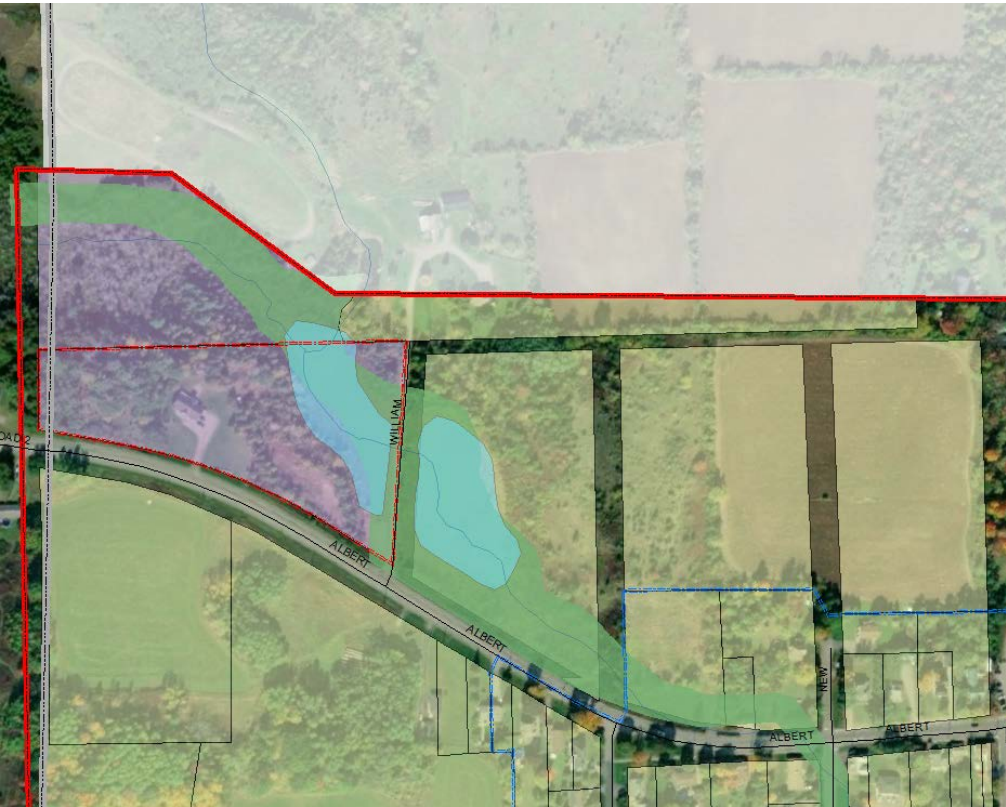
|                |                            |
|----------------|----------------------------|
| Area           | Trent Hills – Hastings     |
| Size:          | 1.33 ha                    |
| Location       | Designated Greenfield Area |
| Status         | Vacant                     |
| Recommendation | Convert to Residential*    |

Note: Subject to further review regarding developability.

| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | √ |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | √ |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | √ |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible with surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality’s overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |



K.2.4 Albert Street West



|                |                            |
|----------------|----------------------------|
| Area           | Trent Hills – Hastings     |
| Size:          | 2.08 ha                    |
| Location       | Designated Greenfield Area |
| Status         | Occupied                   |
| Recommendation | Convert to Residential*    |

Note: Subject to further review regarding developability.

| Localized Criteria |   |   |
|--------------------|---|---|
| 2                  | The site is <b>not</b> located in proximity to major transportation corridors (e.g., highways, Goods movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).  | √ |
| 3                  | The site <b>does not offer</b> direct access to major transportation corridors (e.g., highways, Goods Movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail). | √ |
| 4                  | The site is located outside or on the fringe of an assembly of Employment Areas.  | √ |
| 5                  | The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.   | √ |
| 6                  | The proposed conversion to non-employment uses is compatible with surrounding land uses and/or could be mitigated from potential land-use conflicts.  | √ |
| 7                  | The conversion of the proposed site to non-employment uses would not compromise the Municipality’s overall supply of large employment land sites.   | √ |
| 8                  | The conversion of the site to a non-employment use would not conflict with municipal interests and policies.  | √ |