

## Official Plan Update Discussion Papers

July 2020





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# Engagement with Indigenous Peoples

The history of indigenous peoples in Collingwood, both prior to and after contact with Europeans, is reflected in the cultural perspective and oral history of the people who have occupied and harvested these and area lands and waters. There is a rich archaeological record of indigenous occupation and use in the area. This record readily acknowledges that, although this is one of the more studied areas, the extent of the history of occupation and land use in the area by indigenous peoples has yet to be fully uncovered. As it stands, the record we do have matches the written accounts of early European contact with indigenous people that documented settlement by thousands of people living in communities across the area in complex societies with unique social and cultural perspectives. This history is an evolving one and reflects the dynamics of indigenous land use patterns, the geo political and post-colonial legacy of interaction with other cultures and self-determination to the present day.

To recognize the important contributions of indigenous peoples in Collingwood, each formal meeting of the Town of Collingwood Council begins with an evolving acknowledgement of indigenous peoples that generally runs as follows:

“Today we acknowledge that this event is taking place on the traditional territory of the Indigenous peoples of Turtle Island, including the traditional lands of the Anishinaabek, Haudenosaunee, and Ojibwe peoples, and on lands connected with the Lake Simcoe-Nottawasaga Treaty of 1818. This is the home of a diverse range of Indigenous peoples whom we recognize as contemporary stewards of the land and vital contributors of our society.”

This acknowledgement and its spirit extends to the Official Plan Update. The Town recognizes those indigenous peoples who reside in, have historical connections to and contribute to the community in Collingwood and the surrounding area today. The Town acknowledges the historical and cultural perspective of indigenous peoples and their unique relationship with the land. As the Official Plan Update focuses on where and how land is used in Collingwood, in this respect, the Official Plan Update can benefit from the unique perspective of First Nations and Metis people. To this end, the Town is reaching out to indigenous people with connections to the area to seek opportunities for engagement.

The Provincial Policy Statement (the Province’s lead policy document on the land use regime in Ontario) sets out and prioritizes matters of Provincial interest and requires that municipalities conform or have regard to these accordingly. Through the Official Plan Update the Town will seek to fulfill the directives of the Province of Ontario as set out in the Provincial Policy Statement by reaching out to area First Nations and Metis to:

- > Engage with Indigenous communities and coordinate on land use planning matters; and,
- > Engage with Indigenous communities and consider their interests when identifying, protecting and managing cultural heritage and archaeological resources.

At a time of reflection on the relationship with indigenous peoples both past, present and moving forward, the Town seeks to fulfill this direction and, where possible, help continue on the path of reconciliation.

# 00 Introduction and Purpose of the Discussion Papers

## What will your Collingwood look like over the next 20 years?

The Town of Collingwood is completing its Official Plan Update, to develop a modernized planning policy framework guiding the future evolution and development of the Town. This Official Plan Update project provides an opportunity to refresh the vision for the Town, recognize Collingwood's unique identity, respond to Collingwood's evolution as a community, respond to changing circumstances and plan for the future.

The Official Plan is an important policy document that contains a broad range of community goals, objectives and policies that provide guidance and direction to landowners, potential investors, land developers, home builders, and the community at large. It includes policies related to numerous community-building elements, such as housing, commercial and industrial development, heritage, the environment, parks and open space, transportation, infrastructure and urban design. The New Collingwood Official Plan (NCOP) is required to conform with the County of Simcoe Official Plan and the Provincial Growth Plan and be consistent with the Provincial Policy Statement.

As part of the preliminary phases of the Official Plan Update, the project team undertook a detailed background review to gain an understanding of what are some of the key issues in Collingwood, how is the Collingwood context evolving and what are residents, business owners and developers concerned about. A critical part of this background review also involved reviewing what the current County and Provincial policies say, and what needs to be reflected in the NCOP.

The results of this comprehensive background work is presented in the 8 Discussion Papers. The purpose of these Discussion Papers is to organize the project team's findings in a logical manner, provide access to these findings to all who are interested in the Official Plan Update, and serve as the basis for obtaining additional public and stakeholder input. The Discussion Papers will set the stage for the next step of preparing an Options and Recommendations Report and, ultimately, preparing the NCOP.

The 8 Discussion Papers are designed to act as 'stand-alone' documents, with each including the same introduction and context information throughout. However, the topics addressed through each of the Discussion Papers are interconnected, and therefore gaining a comprehensive overview of specific topics may require reference to multiple Discussion Papers.

Responding to the unique global event now impacting many facets of our everyday lives, the project team also prepared a 9th document to outline some of the potential land use planning considerations resulting from the Covid-19 pandemic. As this public health crisis is still underway and there remain many unknowns, this document is not intended to outline definitive impacts, and is instead intended to start a conversation to explore this issue.

The next two sub-sections introduce how to shape the Official Plan through policy language, and an overview of the Collingwood context. More detail on land use planning in Ontario and the role of the Official Plan is found in the Appendix.



## Levels of Control: Regulate - Manage - Facilitate

It will be important to consider the specific language of the policies in the NCOP. Each policy provides direction on how it is to be implemented, how it is situated within the broader Town-wide context, and how it relates to other policies. The choice of language in the NCOP is crucial.

For each topic to be included within the NCOP, with a few exceptions, a decision about what to control and the level of control to be exercised will need to be made. The language used in the NCOP will distinguish between the types of policies and the nature of implementation. The identification of the “level of control” is an important discussion because it will involve decisions about how the NCOP will be applied throughout Collingwood, particularly in consideration of achieving particular elements of the vision and principles.

- > **Regulate** - The Official Plan can include both aspirational and regulatory elements. At the regulatory level, the Official Plan includes policies that specifically identify what is to be done, and how it is to be done. The wording of regulatory policies tends to include words like ‘require’, ‘will’, ‘shall’ and ‘must’, identifying elements of the policy framework that are mandatory, and that compel a landowner to do things in conformity with the policy in a very specific way. When a policy is considered at the regulatory level there is typically little room for interpretive flexibility;
- > **Manage** - A policy framework that is somewhere in between the regulatory and facilitative levels is considered to be more focussed on a management function. Words used here include ‘permit’, ‘prefer’, ‘may’ and ‘should’. This more permissive approach

talks about principles and uses words that have inherent interpretive flexibility. Generally, the less specific and less narrow the policy framework is, there is less control exerted over development and there is more flexibility to allow things to happen; and,

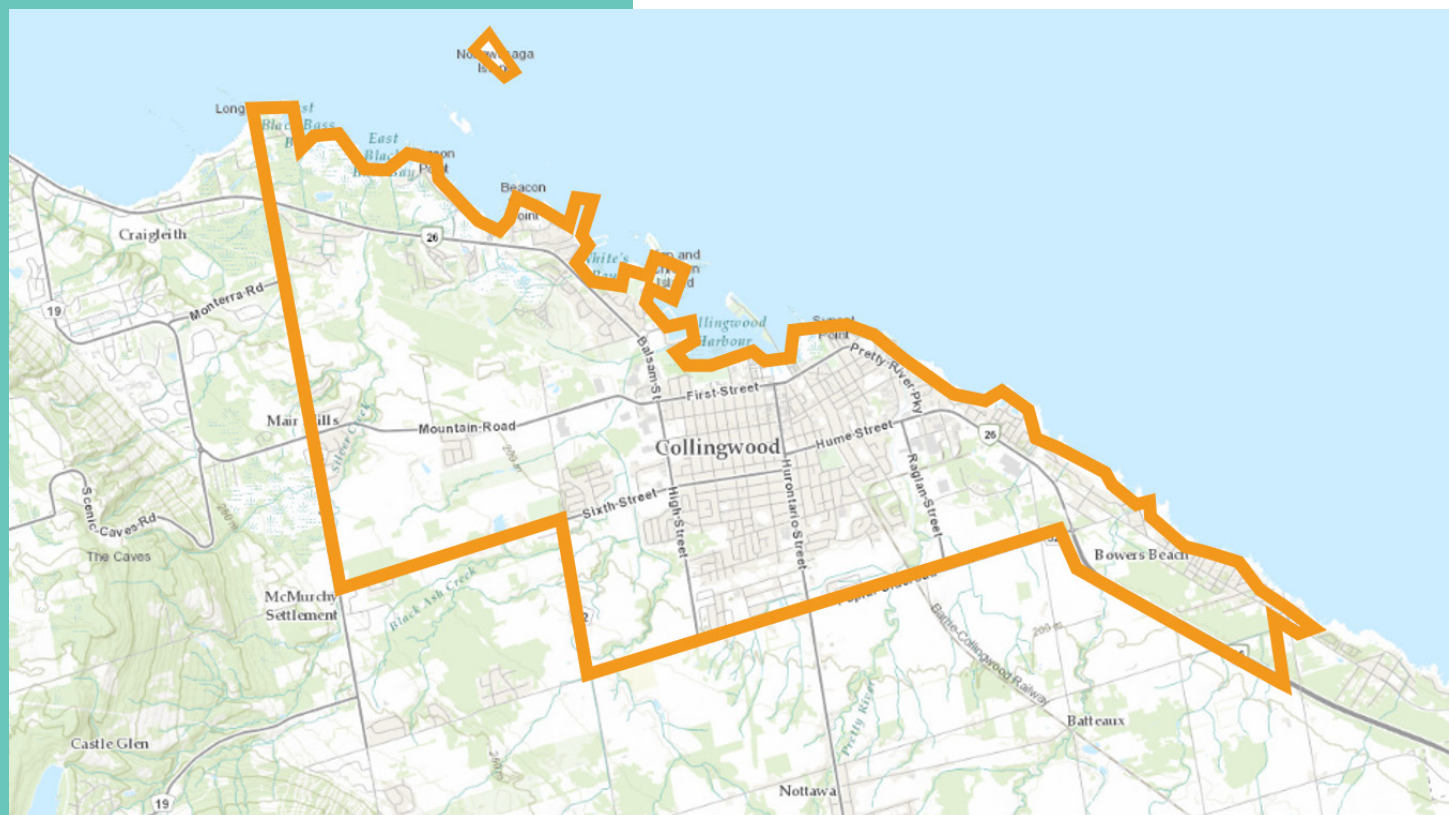
- > **Facilitate** - The Official Plan is, by nature, an aspirational document, providing a road map for the Town over a long-term time horizon. Within the NCOP, there will be town-building elements that are desirable, but more difficult to achieve due to market responsiveness, or fiscal constraints. The NCOP in considering its regulatory and management functions, should also be considered a powerful tool to facilitate positive change. The facilitative element of the NCOP is expected to use words like ‘encourage’, ‘desire’ and, in some cases, ‘incent’. Where a particular town-building element is desirable, but is typically difficult to achieve, the policy framework needs to move to its facilitation function. The facilitation function generally deals with a spectrum of key elements, including:
  - + Establish the environment for change;
  - + Reduce the costs associated with development; and,
  - + Reduce the inherent risk of the development approval process.

The Town will play an important role in the facilitative aspects of the NCOP, and in doing so all of the identified key elements noted above need to be considered, and some of those elements must find their way into the NCOP.

## Collingwood Context

The Town of Collingwood is located along the shoreline of Nottawasaga Bay in the northwest corner of the County of Simcoe, herein referred to as “Simcoe County.” The municipality’s total area amounts to an estimated 3,300 hectares (8,150 acres), and is generally bordered by Highway 26 and Poplar Sideroad and Sixth Street to the south, Simcoe Road 34/Grey Roads 19/21 to the west, and the Nottawasaga Bay shoreline to the north and east. Surrounding municipalities to Collingwood include The Blue Mountains to the west, Clearview to the south, and Wasaga Beach to the far east.

Town of Collingwood Municipal Boundary



## Collingwood Context Continued

Collingwood functions as a major commercial centre for northwest Simcoe County and northeast Grey County. As one of the larger settlement areas within Simcoe County, Collingwood offers a wide range of residential, commercial, institutional, and recreational uses; and has continued to evolve into a well-balanced community for residents and visitors. The Town of Collingwood possesses the following key locational characteristics:

- > **Transportation Access:** Collingwood is primarily accessed by way of Highway 26, which connects the Town to Wasaga Beach and Barrie to the east, and Owen Sound and other South Georgian Bay communities to the west. Further, Highway 26 is the primary route for traffic travelling to Blue Mountain Resort and other area ski destinations. Public transit in Collingwood is operated by Colltrans, which includes three frequent bus transit routes within the Town. A less frequent Collingwood-Wasaga Beach Link route to connect the two municipalities is operated by Simcoe County LINX. For the most part, however, Collingwood is an auto oriented community;
- > **Local Institutions:** The Town is home to the Collingwood General and Marine Hospital and Georgian College – South Georgian Bay Campus, which offers full-time academic programming in hospitality, personal support work, and computer programming, among others. Both of these institutions provide existing and future residents of Collingwood with access to well-paying jobs as well as essential services;
- > **Local Commercial Uses:** Because of its role as a regional centre and tourism and outdoor recreation destination, Collingwood has an abundance of commercial nodes with a diverse range of retail/service commercial offerings. Most notably, the western commercial district contains large format retailers/facilities including Canadian Tire, Galaxy Cinema, Walmart, The Home Depot, and Winners. Hurontario Street functions as Collingwood's historic downtown and offers a variety of restaurants, boutique shops, and art galleries; and,
- > **Outdoor Recreation Amenities:** Collingwood is well situated on the shoreline of Nottawasaga Bay, and in proximity to prominent ski and snowboard destinations. Further, the area's extensive trail networks, harbour, scenic caves, golf courses, and beaches have firmly established the Town as a four-season tourism destination and has attracted a significant visitor and seasonal population.



# 01 Overview: Growth Management Discussion Paper

Growth Management is a fundamental policy element of an Official Plan in Ontario. Developing a thorough understanding of projected population and employment growth, the land needed to accommodate growth and how much commercial space is needed to meet the needs of residents and visitors is crucial to establishing a logical urban structure and ensuring an efficient, complete and liveable community.

The new Growth Plan for the Greater Golden Horsehoe (2019) outlines population and employment projections to 2041. However, Simcoe County has not yet completed its Municipal Comprehensive Review (MCR) work to conform to the new Growth Plan and assign the 2041 growth projections to local municipalities. As a result, this discussion paper explores growth expectations to both 2031 and 2041, and will contribute to the conversation on growth management both at the local level, and at the County level through Collingwood's input on the MCR.

Key principles for growth management with Collingwood should encourage opportunities for intensification and mixed use development, and plan for new communities which are compact, well connected and provide a range of housing opportunities. However, while these elements are addressed throughout the other Discussion Papers, this Discussion Paper addresses those components of growth management that will create the foundation for shaping Collingwood as it grows.

The Growth Management Discussion Paper focuses on the following topics

- > Growth Projections;
- > Growth Management for Residential Uses;
- > Growth Management for Employment Uses; and,
- > Growth Management for Commercial Uses.

The following discussions are based on a review of the existing policy context, including Provincial Plans, the County Official Plan and the existing Town Official Plan, which is found in Section 03, as well as a detailed growth management analysis, which is found in Sections 04-06.

All of the work carried out within this Discussion Paper is based on the approach and assumptions articulated in Appendix I and II.

## Definitions/Glossary

**PPU “Persons per unit”:** Represents average household sizes. The PPU is calculated by dividing the number of occupied dwelling units by the total population.

**Seasonal/Unoccupied Dwelling:** Dwellings that are not occupied by usual residents.

**Net Undercoverage:** Accounts for households and populations of people that are missed and/or undercounted by the Census. Missed households can occur when units are located in unusual areas or secondary suites without a visible entrance from the street. Missed people can include those informally staying at another person’s house, individuals working on remote work sites (like Northern Alberta), and individuals affected by homelessness. The net undercoverage rate is determined by dividing the appropriate Census Division Total Population - which is published in Statistics Canada’s Annual Demographic Estimates - by the Census Population. This rate is then applied to the Study Area Census Population.

**Activity Rate:** Refers to the amount of people employed as a percentage of the population.

**FSR:** Food Store Retail

**NFSR:** Non-Food Store Retail

**BWL:** Beer, Wine, and Liquor Stores

## 02 Key Topics for Discussion

### A Growth Projections

#### Why it's Important

Growth projections form the backbone of the Official Plan. The projections give the Town an idea about how much they are expected to grow, which then leads to a discussion about where and how to grow. With respect to this Discussion Paper, growth is projected in three land use categories - Residential, Employment and Commercial uses.

#### Current Policy Framework

In Ontario, the planning process is led by planning policy. Collingwood's growth, and policies for how it is to grow, is defined by the Provincial Growth Plan, which is further refined in the Simcoe County Official Plan. It is required that the New Collingwood Official Plan conform to the Growth Plan and conform to the County of Simcoe Official Plan. Currently, the Growth Plan projects growth in Simcoe County to the year 2041, but the Simcoe County Official Plan projects growth to 2031. The following projections are provided for Collingwood:

- > Under Schedule 7 of the Growth Plan, Collingwood's 2031 population has been forecast at 33,400 persons, with employment forecasted at 13,500 jobs. Both the population and employment in 2031 amount to 5% of Simcoe County's total population and employment;
- > Collingwood's population is projected to grow by 10,931 persons between 2016 and 2031. This represents an average annual growth rate of 3.2% over the forecast period. During the same period, Collingwood's employment is projected to grow by 1,558 jobs at an average annual growth rate of 0.9%;
- > Population and employment projections to 2031 reflect Growth Plan targets. However, there appears to be a significant disconnect between projected population and jobs. In 2016, owing to its status as a major tourist and recreation centre, the employment base

represented over 50% of the population. This ratio, also called the "activity rate" means that there is 1 job for every 2 residents. However, employment growth projected to 2031 would represent an activity rate of only 14% for new growth. A higher rate of future employment growth will almost certainly be required just to support the extent of population growth projected;

- > Collingwood's estimated seasonal population in 2016 was 6,183 persons. This amounts to 17.7% of Collingwood's total dwelling units reported in the 2016 Census, and is equivalent to 28% of the Town's population. This seasonal population is in addition to the permanent population. It has been assumed that this significant seasonal population will have an impact on inflow for retail and non-retail facilities in our commercial space analysis.

As noted, the Provincial Growth Plan projects growth in Simcoe County to 2041, and the County is currently in the process of allocating that growth to its constituent municipalities to match that timeframe.

This Discussion Paper projects Collingwood's potential population and employment growth to 2041. It is estimated that the Town will capture 10% of Simcoe County's total population growth between 2031 and 2041, amounting to a population of 41,500 persons by 2041. In addition, it is anticipated that Collingwood's employment will achieve a 30% activity rate, resulting in 17,498 jobs by 2041. These projections will be provided to the County as input for consideration into their Municipal Comprehensive Review process.

## What We've Heard

The Phase 1 engagement process, including the first Community Workshop and consultation with Council, has revealed a range of growth management perspectives. Perspectives range from wanting to promote Collingwood as a centre for growth and expansion, with an eye to opportunities for additional economic development and expanding the housing market within the Town, to focusing more on a restricted growth scenario, where the existing character and conditions within the Town are generally maintained as they are today.

Overall, the stakeholder engagement process has indicated support for intensification in order to accommodate Collingwood's projected growth. The stakeholders felt that the Town should:

- > Encourage intensification throughout the Town, in building forms that are appropriate for each area;
- > Encourage mixed use development throughout the Town so that people can live near where they work and shop; and,
- > Encourage intensification in the downtown and consider expanding the downtown area to accommodate more growth.

## Things to Think About

1. In a general sense, the amount of growth, from both residential and employment perspectives is established by the Province and supported by the Simcoe County Official Plan. It is Collingwood's responsibility to accommodate that growth in a way that conforms with the policies of the Province and the County.
2. The County is currently considering growth allocations, and the regulatory regime that will implement where and how to grow across the County through their Municipal Comprehensive Review. If the Town wishes to restrict growth, to reduce intensification targets and/or reduce greenfield development density targets, then the Town would need to begin those discussions with the County immediately. It is important to note, however, that Collingwood, as one of the larger, and

most complete communities within Simcoe County, playing an important role in the community structure of the County, has a responsibility to accommodate an appropriate share of growth, in a form, and in locations that are in conformity with Provincial growth objectives.

## B Growth Management for Residential Uses

### Why it's Important

A discussion about residential growth is a discussion about the future choices households will have about where to live and how to grow. Collingwood has a current collection of residential neighbourhoods that have established a specific community context that has character and quality. It is also primarily focused on single-detached dwellings.

Since 2005, the Province, the County and the Town have implemented planning policy frameworks aimed at managing new residential development in a way that promotes a greater range and mix of housing types, the inclusion of higher density house forms, all in a structure that is intended to support existing and planned investment into transit and other non-automobile modes of transportation.

### Current Policy Framework

Provincial policy is clear about where and how residential growth should occur. New residential growth in Collingwood will take place in Designated Greenfield Areas and through intensification opportunities. Intensification will primarily occur within the Downtown and defined mixed-use and higher intensity corridors. The Province and County make it clear that Collingwood will need to accommodate a significant portion of residential growth and will need to do so in a way that supports the efficient use of land, infrastructure and public service facilities.

- > Collingwood's forecast population growth between 2016 and 2031 results in demand for an additional 6,216 housing units. Based on the local municipal intensification targets from the original land budget, a minimum of 2,486 units are required within the built boundary with the remaining 3,729 units located in the Designated Greenfield Area;
- > The combination of completed units between 2016-2019, registered and draft approved plans, and future unit potential on all vacant lands results in a supply of 9,621 housing

units. When compared to the demand of 6,216 housing units, there will be a surplus of 3,405 housing units in Collingwood by 2031;

- > To forecast residential land supply in 2041, two potential growth scenarios have been provided. Both Scenario A and B are based on a higher level of intensification than assumed in the County's land budget. Scenario A maintains the County of Simcoe Land Budget's existing local municipal intensification target, while Scenario B's targets have been adjusted upwards; and,
- > Between 2016 and 2041, it is estimated there will be demand for 10,504 additional housing units to support the projected population of 41,500 persons and the seasonal population of 11,775 persons. It is estimated that the Town will have a shortfall of 883 housing units by 2041. That conclusion suggests that a further supply of residential units and land supply would be needed to support and sustain the growing population of Collingwood to 2041.

### What We've Heard

The Phase 1 engagement process, including the first Community Workshop and consultation with Council, identified that residents recognize the need to build more housing, in particular, higher density housing and more affordable forms of housing to accommodate projected residential growth. The stakeholders felt that the Town should:

- > Promote the development of more affordable/attainable housing;
- > Encourage redevelopment of underused sites near retail with higher density housing;
- > Support the adaptive reuse of older/heritage buildings to increase housing supply;
- > Encourage development of more housing options for all demographics in infill and greenfield development; and,
- > Encourage intensification throughout the Town, in building forms that are appropriate for each area.



## Things to Think About

1. As this Discussion Paper has noted, there is not enough residential supply to accommodate projected population growth to 2041. The current intensification and Designated Greenfield Area targets will not result in a sufficient residential housing supply to accommodate forecasted growth.
2. As previously discussed, the County is currently undergoing its MCR process, which includes the determination of growth allocations. If the Town wishes to increase or decrease its intensification and density targets to accommodate projected residential growth to 2041, then it will need to confer with the County immediately on the suitability of new intensification targets and density targets for the Town.
3. The Town should continue to prioritize intensification within the Downtown and along identified corridors. The Town should consider facilitating intensification by:
  - + Developing a strong vision and supportive policies which prioritize and support residential intensification projects;
  - + Ensuring appropriate infrastructure is in place to support higher density development;
  - + Reducing the cost of development - intensification is generally considered to be a more expensive and complex form of development, and the Town may consider the introduction of financial incentives to make it more attractive to developers; and,
  - + Reducing the risk of the development approval process - due to the complexity that is often involved in intensification, there are numerous elements of a project's planning approval process that can pose a risk to the project's ultimate success. Reducing the risks of intensification projects may include pre-zoning certain lands to permit the desired form of intensification and building support among Town staff and Council members to ensure a smoother approval process.

## C Growth Management for Employment Uses

### Why it's Important

It is important for Collingwood to grow its employment base in concert with residential growth - to promote a complete community, to provide employment opportunities for local residents and to ensure a healthy tax base.

### Current Policy Framework

Provincial and County policy frameworks place a strong emphasis on promoting economic development and competitiveness by ensuring that sufficient and appropriate sites are available for employment uses. Further, Provincial policy provides clear direction on the need to protect and promote employment areas for current and future employment uses.

The Provincial Policy Statement recommends that municipalities at the time of an Official Plan Review, assess employment areas to ensure that the designation is appropriate for the planned function. In addition, the Province and County direct a significant portion of employment growth to Primary Settlement Areas (like Collingwood) and encourage the efficient use of employment areas by increasing employment densities.

This Discussion Paper identifies the following:

- > To forecast employment land supply in 2031, an analysis for two potential growth scenarios has been provided. Scenario A maintains the existing assumptions from the County's Land Budget and the Schedule 7 employment level of 13,500 jobs. The Schedule 7 employment target does not provide for sufficient jobs to serve the anticipated growth in population. As a result, Scenario B has been prepared, which uses a 30% job to population ratio for the period 2017 to 2031, compared to a 14% rate implied by the Growth Plan forecast. This results in an adjusted employment level of 15,068 jobs by 2031 based on a 30% activity rate;
- > The net vacant developable supply of employment lands in Collingwood is estimated at 113.5 hectares. The majority of this land is located in the industrial park in the southeast corner of Collingwood, with some additional concentrations of employment land along Stewart Road and Mountain Road/Tenth Line. While there are prominent industrial users located in Collingwood, many of the employment land parcels are occupied by non-traditional employment land users, such as fitness centres and consumer rental services;
- > Based on the employment growth between 2017 and 2031, Scenario A estimates the growth of 1,462 jobs, and Scenario B estimates 3,030 new jobs. Both scenarios assume that employment land employment accounts for 21% of the total - resulting in 398 and 824 jobs located on employment lands for Scenario A and B, respectively. The 21% rate is consistent with the rate used in the County's Land Budget; and,
- > The 2041 employment land growth assumes that the Town will add 5,460 new jobs between 2017 and 2041, resulting in a total of 17,498 jobs in 2041. An estimated 1,486 new jobs will be located on employment lands in 2041, which results in an employment land need of 74 hectares, and a surplus of 22 hectares in 2041. In recent years, employment land absorption in the Town has been very slow. The identified surpluses may be larger, if existing employment uses intensify over time and/or if absorption is not accelerated either through increased market attraction or economic development initiatives.

## **What We've Heard**

The Phase 1 engagement process, including the first Community Workshop and consultation with Council, identified the need to preserve employment by protecting existing employment lands to attract new businesses and opportunities and promote economic development. In addition, stakeholders felt that the Town should:

- > Attract tech sector jobs and promote new employment opportunities; and,
- > Ensure that employment lands are not converted for residential use.

## **Things to Think About**

1. The Potential to consider an employment land conversion - Notwithstanding that the stakeholder consultation identified an aversion to employment land conversion, there is some opportunity to consider some conversion, based on the 2041 growth projections. There is also an identified need for some additional residential lands by 2041, if intensification and greenfield density targets remain about the same, or are reduced. As such, there is the opportunity to at least consider an employment land conversion.

As previously noted, the opportunity to consider an employment land conversion rests with the County, through their Municipal Comprehensive Review process. This Official Plan exercise can be used to begin a conversation about employment land conversion with the County.

## D Growth Management for Commercial Uses

### Why it's Important

Commercial development is a fundamental part of a complete community. Retail and service commercial uses, accommodations and restaurants create agglomerations of activity - like the Downtown - that are both highly utilized by businesses and residents, and cherished as social centres. Retail and service commercial uses and restaurants are also a critical element of a community that serves a substantial tourist market. These facilities are important in establishing the character of the Town.

Planning for retail and service commercial uses, accommodations and restaurants is an important municipal activity because there is a strong desire to ensure the maximum commercial opportunity and choice for residents, businesses and tourists, while attempting to manage those opportunities to ensure healthy competition.

### Current Policy Framework

Provincial policy states that accommodating an appropriate range and mix of employment including commercial is important for creating a healthy and livable community. Commercial land uses need to occur within settlement areas and should be supported by transit and active transportation. In addition, the retail sector will be supported by promoting compact built form and intensification, encouraging the integration of those uses with other land uses to support the achievement of complete communities.

This Discussion Paper has identified:

- > The Town of Collingwood has a total of 186,120 square metres (2,111,000 square feet) of retail/service commercial space, of which 10.8% is comprised of FSR facilities, 0.7% is comprised of BWL facilities, 43.0% is comprised of NFSR facilities, and 41.8% is comprised of services;
- > The retail/service commercial vacancy of the Study Area rate is 3.6%. This is below a healthy rate, and suggests that there may exist some unfulfilled demand at the present time;
- > Collingwood functions as the regional commercial centre for northwest Simcoe County and Grey County. There are limited nearby retail goods and services to serve the Collingwood population outside of the Town. However, Collingwood competes with the Town of Blue Mountains and Wasaga Beach for tourist and seasonal resident spending;
- > There are five development applications proposed in Collingwood that collectively amount to 4,610 square metres (49,600 square feet) of gross floor area (GFA). All of the proposed retail/service commercial projects are intensification projects that are situated along the mixed-use intensification corridors located within the built-up area boundary;
- > There are some 85 acres (34 hectares) of vacant commercially designated lands located in Collingwood. More than 50% of these vacant lands are located in the Mixed-Use Intensification Area, which includes Node 1 – Downtown Core, Node 2 – First Street Corridor, and Node 3 – Western Regional Commercial;
- > There will be a need for approximately 57,670 square metres (620,750 square feet) of new retail/service commercial space in Collingwood by 2031, and 107,875 square metres (1,161,160 square feet) by 2041;
- > There is also some 4,610 square metres (49,600 square feet) of retail/service commercial space currently proposed to be developed in Collingwood. Excluding this space, there will be a net requirement to accommodate approximately 103,270 square metres (1,111,560 square feet) of retail/service commercial space by 2041;
- > Overall, there are 34 hectares (85 acres) of commercially designated vacant lands in Collingwood. Once an assumed 25% land coverage assumption is applied and the 4,610 square metres (49,600 square feet) of active commercial development applications has been accounted for, the vacant land can accommodate an estimated 90,450 square metres (973,617 square feet) of new retail/service commercial space;

- > It is anticipated that the Town of Collingwood will not have a sufficient supply of vacant commercially designated land to meet demand by 2041. Based on a 4,830 square metre (52,000 square foot) annual absorption rate, it is estimated that the vacant land supply will be exhausted by 2038;
- > This eventual shortfall can be eliminated through more efficient land use strategies, such as shared or reduced commercial parking requirements, mixed-used projects and more walkable development formats within the Town's commercial corridors and nodes. In addition, it is likely that over time, there will be an opportunity to develop small scale local serving commercial nodes as part of new subdivisions in the Designated Greenfield Areas to support future residential communities; and,
- > It is concluded that there is no need to designate additional commercial lands to 2031, other than to support existing and future local areas where there is a demonstrated need for additional commercial space or to meet planning objectives, such as increased walkability or reduced travel times. However, the vacant land supply could be exhausted by 2038, with the above noted strategies.

### **What We've Heard**

The Phase 1 engagement process, including the first Community Workshop and consultation with Council, has provided the following input with respect to commercial growth management:

- > A need to expand retail and service commercial facilities throughout the Town; and,
- > Encourage intensification in the Downtown and consider expanding the Downtown area to accommodate more growth.

We have also heard that Collingwood has a tradition of planning policies that tend to protect the Downtown as a location for certain types and scales of retail and service commercial uses against undue competition from other

commercial centres found throughout the Town. It is felt that this approach has helped the Downtown remain vibrant and attractive over time, and some stakeholders feel that there remains a desire to continue to protect and enhance the Downtown.

### **Things to Think About**

1. In order to address the long-term shortfall (by 2041) in vacant commercially designated land, the Town should encourage more intensive retail development or direct growth to underutilized commercial parcels with space for additional infill development. The promotion of substantial opportunity for more mixed use development (retail and service commercial at-grade, with residential above) has the potential to achieve a number of key planning objectives in key locations throughout the Town. In addition, the Town could consider more detailed planning policies that, for example, reduce parking requirement, which would allow for a higher land coverage rate.



## 03 Policy Review

### A The Provincial Policy Statement 2020

#### POLICY REFERENCE:

Section 1.1 (Managing and Directing Land Use to Achieve Efficient and Resilient Development and Land Use Patterns)

Section 1.3 (Employment)

Section 1.4 (Housing)

The Provincial Policy Statement (PPS) provides policy direction on matters of provincial interest related to land use planning and development. The PPS provides for appropriate development while protecting resources of provincial interest, public health and safety, and the quality of the natural and built environment. The PPS supports improved land use planning and management, which contributes to a more effective and efficient land use planning system.

The PPS is issued under the authority of Section 3 of the Planning Act and came into effect on May 1, 2020. It is a requirement that the Town of Collingwood's new Official Plan shall "be consistent with" the PPS. The test of "be consistent with" has been interpreted to mean that policies and decisions may vary from the policies of the PPS only if there is a rationale/justification for the variance.

The Provincial Policy Statement (PPS), under Section 1.1.1, requires municipalities to plan for "efficient development and land use patterns which sustain the financial well-being of the Province and municipalities over the long term"

Further, under the PPS, settlement areas shall be the focus of growth and development, occurring as:

- > Intensification and redevelopment within previously developed areas; and,
- > New development in designated growth areas, which have not yet been fully developed.

With respect to growth management objectives, the PPS instructs the Town to consider all of the following policies for inclusion in the Town's new Official Plan:

- > Maintain at all times the ability to accommodate residential growth for a minimum of 12 years through residential

intensification and redevelopment and, if necessary, lands which are designated and available for residential development;

- > Maintain at all times land with servicing capacity to support at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans;
- > Permit and facilitate all types of residential intensification and redevelopment;
- > Direct new housing to locations served by existing or planned infrastructure and public service facilities;
- > Promote residential densities that use land, resources, infrastructure and public service facilities efficiently, and support the use of active transportation and transit in areas where it exists or is to be developed; and,
- > Establish development standards for residential intensification, redevelopment and new residential development that minimize housing costs and facilitate compact form.

The Province requires municipalities to plan for, protect, and preserve Employment Areas, ensure the provision of necessary infrastructure, and protect Employment Areas in proximity to major goods movement facilities and corridors. During an official plan review, municipalities should assess Employment Areas to ensure the designation is appropriate for their planned function, and sensitive land uses shall be prohibited from employment areas planned for industrial and manufacturing uses.

The conversion of Employment Areas to non-employment uses is only permitted through a municipal comprehensive review, and only where it is demonstrated that:

- > The land is not required for employment purposes over the long-term; and,
- > There is a need for the conversion.

Employment Area conversions may take place prior to an official plan review, in accordance with the criteria outlined in policy 1.3.2.5.

## B The Growth Plan for the Greater Golden Horseshoe (2019)

### POLICY REFERENCE:

Section 2.1.1 (Managing Growth)

Section 2.2.2 (Delineated Built-up Areas)

Section 2.2.7 (Designated Greenfield Areas)

Section 6.3 (Managing Growth)

The Growth Plan for the Greater Golden Horseshoe (Growth Plan) works hand in glove with the PPS, with the distinction that the PPS is applicable to the entire Province of Ontario, whereas the Growth Plan is only applicable to the defined Greater Golden Horseshoe.

The Growth Plan for the Greater Golden Horseshoe (2006) was the first growth plan to provide a framework for implementing Ontario's vision for building stronger, prosperous communities by better managing growth in this region. It established the long-term framework for where and how the region will grow, while recognizing the realities facing our cities and smaller communities and acknowledging what governments can and cannot influence. It also demonstrated leadership for improving the ways in which our cities, suburbs, towns, and villages will grow over the long-term.

The new Growth Plan (2019) builds upon the success of the initial Growth Plan (2006) and responds to the key challenges that the region continues to face over the coming decades with enhanced policy directions. Progress has been made towards the achievement of complete communities that are compact, transit-supportive, and make effective use of investments in infrastructure and public service facilities. At the same time, efforts must continue to ensure protection of our natural areas and support climate change mitigation and adaptation as Ontario moves towards the goal of environmentally sustainable communities.

The Growth Plan is issued under the authority of Section 7 of the Places to Grow Act, 2005. It was approved through an Order in Council under that Act to come into effect on May 16, 2019. It is a requirement of current planning legislation that

the Town of Collingwood Official Plan conform with the Growth Plan, which is a slightly more onerous test than the "be consistent with" test of the PPS. Conformity is a test with limited interpretive flexibility. The Growth Plan is a document that provides an overarching policy framework that is aimed at achieving important Provincial planning objectives. It directs specific actions that must be fully reflected in the Town's new Official Plan.

### Growth within a Defined Community Structure

Within the Growth Plan, the Town of Collingwood is identified in Figure 2-1, in its entirety, as a Primary Settlement Area, and it is expected that it will accommodate a significant amount of new growth to 2031, to 2041 and beyond. Growth for Collingwood to 2031 has been established in the current County of Simcoe Official Plan. Future growth to 2041 and beyond is the subject to a Municipal Comprehensive Review currently being undertaken by the County.

One of the foundational elements of the Growth Plan is for municipalities to plan for long-term growth within a defined community structure - a structure that includes the natural heritage system and the waterfront, the Downtown, mixed-use and higher intensity corridors, as well as defined lower intensity residential neighbourhoods and employment areas.

Future housing development in Collingwood will be accommodated within the Downtown and within mixed-use and higher intensity corridors, as well as within residential neighbourhoods. Within that community structure, new housing will be delivered in two different contexts:

- > Designated Greenfield Area Opportunities: A Designated Greenfield Area is defined in the Growth Plan as:

"Lands within settlement areas but outside of delineated built-up areas that have been designated in an Official Plan for development and are required to accommodate forecasted growth to the horizon of this Plan. Designated greenfield areas do not include excess lands."

In other words, greenfield development opportunities are part of the remaining undeveloped lands within the Collingwood

municipal boundary, and currently are, or will be subject to urban development applications at some time in the future. Greenfield areas that are intended to become residential neighbourhoods (and are not subject to current development approvals) will be subject to a minimum density requirement, and that requirement is intended to drive the requirement for a range and mix of housing types.

The Growth Plan states that the applicable minimum greenfield density target for the County of Simcoe is not less than 40 residents and jobs combined per hectare. The residential greenfield minimum density target is currently defined in the County of Simcoe Official Plan at 50 persons and jobs combined per gross hectare. New development taking place in designated greenfield areas must further be planned, designated, zoned and designed in a manner that:

- + Supports the achievement of complete communities;
- + Supports active transportation; and,
- + Encourages the integration and sustained viability of transit services.

The future minimum density target may be changed, subject to the Municipal Comprehensive Review currently being undertaken by the County.

> **Intensification Opportunities:** Intensification is defined in the Growth Plan as follows:

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

- + Redevelopment, including the reuse of brownfield sites;
- + The development of vacant and/or underutilized lots within previously developed areas;
- + Infill development; and,
- + The expansion or conversion of existing buildings.”

Intensification opportunities are typically associated with new development within the Downtown and the defined mixed-use and higher intensity corridors. Intensification opportunities will play an important role in providing smaller and higher intensity housing forms that are typically considered more affordable, while also contributing to a dynamic Downtown, support for local businesses, and support for enhanced transit facilities. Intensification is also intended to make more cost-effective and efficient use of municipal infrastructure investments.

The Growth Plan states that the applicable minimum residential intensification target will be based on maintaining or improving the target contained in the Simcoe County Official Plan. The residential intensification target is currently defined in the County of Simcoe Official Plan at 40 percent of all residential development within the Town. The future minimum intensification target may be changed, subject to the Municipal Comprehensive Review currently being undertaken by the County.

The Growth Plan requires that all municipalities develop and implement a strategy to achieve the minimum intensification target, including identifying strategic growth areas as a key focus for development, determining the appropriate built form for strategic growth areas and transitions to adjacent areas, encouraging intensification throughout the delineated built-up area, supporting the achievement of complete communities and prioritizing infrastructure and public service facility investments that support intensification.

The Town is directed to support the retail sector by promoting compact built form and intensification of retail and service uses and areas and encouraging the integration of those uses with other land uses to support the achievement of complete communities.

### **Protecting Employment Areas**

The development of sensitive land uses, major retail uses or major office uses will, in accordance with provincial guidelines, avoid, or where avoidance is not possible, minimize and mitigate

adverse impacts on industrial, manufacturing or other uses that are particularly vulnerable to encroachment.

The conversion of lands within employment areas to non-employment uses may be permitted only through a municipal comprehensive review, undertaken by an upper or single tier municipality,

unless the conversion to a designation that permits non-employment uses satisfies the Growth Plan criteria.

Upper- and single-tier municipalities, in consultation with lower-tier municipalities, will establish minimum density targets for all employment areas within settlement areas.



Figure 2-1: Schedule 8 of the Growth Plan, Simcoe Sub-Area identifies the Town of Collingwood as a Primary Settlement Area.

## C Simcoe County Official Plan (2016)

### POLICY REFERENCE:

#### Section 3.5 (Settlements)

The Simcoe County Official Plan (SCOP) was approved by the Ontario Municipal Board in December 2016. It provides a policy context for land use planning taking into consideration the economic, social, and environmental impacts of land use and development decisions. It was prepared and approved prior to the latest updates of both the Growth Plan (2019) and the PPS (2020), and it is therefore not fully in conformity, or consistent with either. Currently, the County is carrying out a Municipal Comprehensive Review that is intended to bring the SCOP into conformity with the Growth Plan, including the allocation of population and employment growth to Collingwood to the year 2041.

The SCOP is a document designed to assist in growth management in a County expected to experience continued strong growth in population and urban development over the next twenty years in accordance with the Growth Plan (2006) as amended. It attempts to achieve a balance between the demands for economic development, community building, and environmental conservation and provide a framework for coordinated planning with adjacent municipalities, agencies, and other levels of government. The SCOP provides, to a significant extent, a County-wide policy framework guiding the preparation of the new Collingwood Official Plan.

As shown in Figure 2-2, the Town of Collingwood is formally characterized as a Primary Settlement Area. Section 3.5.6 of the Plan outlines the land use objectives for primary settlement areas.

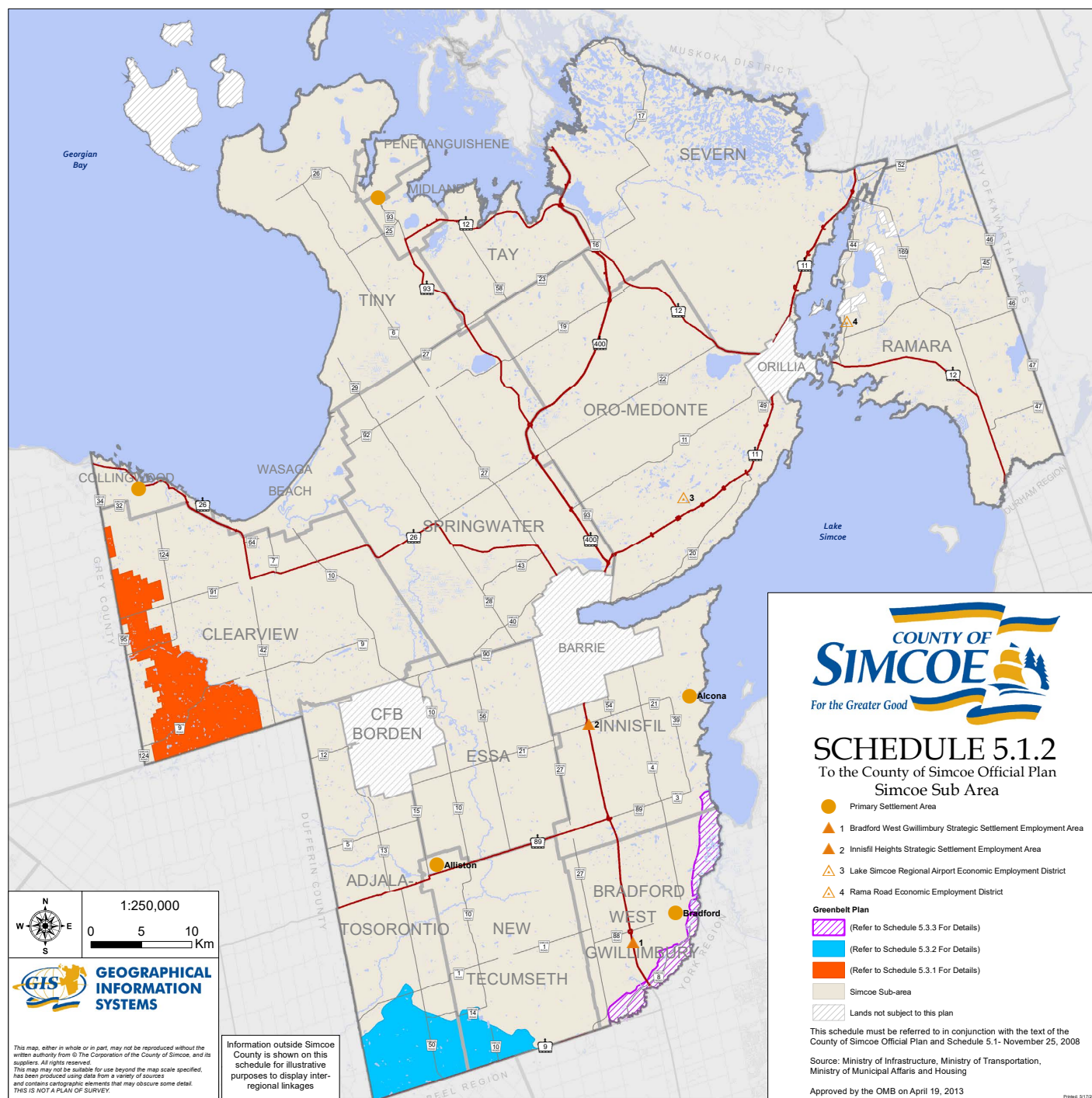
“Primary settlement areas are larger settlements suitable for high intensification targets, public transit services, and high-density targets for designated Greenfield areas and have full municipal water services and municipal sewage services. Primary settlement areas will develop as complete communities. Municipalities with primary settlement areas will, in their official plans, focus and direct a significant portion of its

population and employment forecasted growth to the applicable primary settlement areas while considering growth in other settlement areas through local growth management studies as per Section 3.5.8.”

The intensification target for the Town of Collingwood is 40%, indicating that the remaining 60% of growth is anticipated to occur in designated greenfield lands.

Further, also under Policy 3.5.24 of the SCOP, the Designated Greenfield Areas of Collingwood shall achieve a minimum density target of 50 persons and jobs combined per gross hectare. This minimum density is expected to produce a broader range of low, mid and higher density house forms, including housing that may be more affordable.





**Figure 2-2: Schedule 5.1.2 of The County's Official Plan identifies the Town of Collingwood as a Primary Settlement Area**

## D Town of Collingwood Official Plan

### POLICY REFERENCE:

#### Section 2.5 (Growth Management)

#### Section 4.3 (Residential)

The Existing Collingwood Official Plan (ECOP) was last comprehensively reviewed in 2004 and consolidated in January of 2019. It establishes goals, objectives, land use, transportation, servicing and community improvement policies to direct the physical growth of the Town of Collingwood, within a context of relevant social, economic and environmental constraints, in order to obtain the most desirable living environment for present and future residents, and those citizens from the surrounding area who are utilizing the regional facilities within the Town.

The ECOP establishes the general pattern and quantifies future growth to the year 2031. Its purpose is to ensure the best form of development under the most desirable conditions. It is required that the ECOP be consistent with the PPS and in conformity with the Growth Plan. It is also required that the ECOP conform to the SCOP.

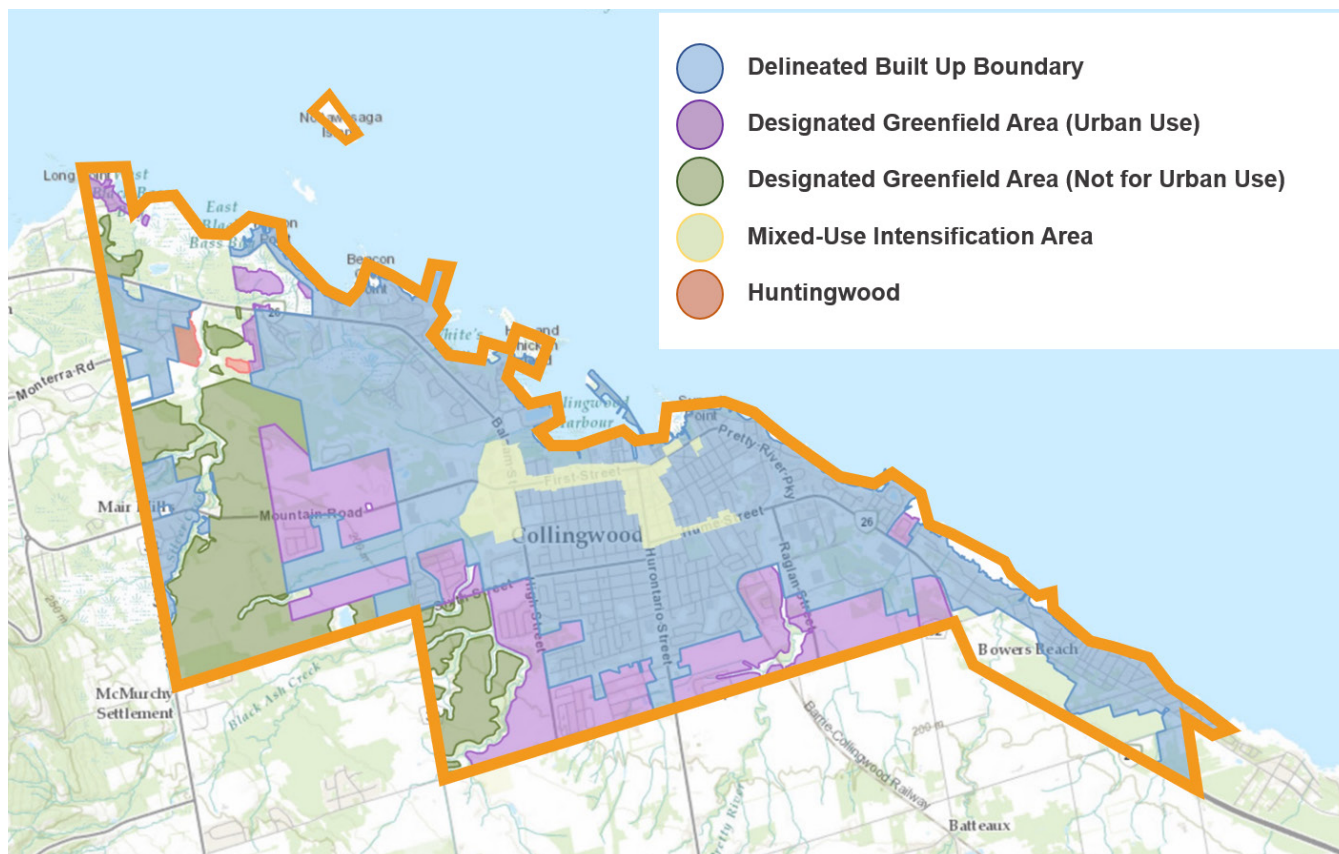
In a general sense, the Goals and Objectives are consistent with the intent of the Growth Plan, the PPS and the SCOP. They form a useful framework for achieving all of the growth management objectives, including the intensification, and greenfield density targets that are identified in the various planning documents.

More specifically, Section 4.3 of the ECOP identifies 5 goals and a number of objectives to be considered in the development of residential areas. The goals and objectives of the ECOP are paraphrased as follows:

- > Provincial and County Policies: to be consistent with the policy direction of the PPS, the Growth Plan and the SCOP. This goal includes much of what has been previously discussed with emphasis on:
  - + To achieve the population and employment growth targets assigned to the Town (the ECOP planning horizon is 2031);
- + Achieving the required residential greenfield density target of 50 persons and jobs combined per gross hectare (as identified in the SCOP);
- + Ensuring that the minimum intensification target of 40% of residential growth is directed to areas within the Town's identified built boundary (as identified in the SCOP); and,
- + To provide a hierarchy of desirable residential development opportunities on the basis of the availability and accessibility of municipal infrastructure and community facilities - emphasizing intensification and redevelopment opportunities.
- > Complete Community: to recognize Collingwood's Growth Plan identification as a primary settlement area within the northwestern part of Simcoe County and support the Town's growth as a complete community.
  - + To achieve efficient and attractive compact urban form that is compatible with and enhances existing development;
  - + To ensure that the design and configuration of residential development does not place undue financial burden on the municipality and reflects a comprehensive consideration of potential costs; and,
  - + To ensure that development in designated greenfield areas only proceeds within the context of broader planning considerations and integration with the existing community.

As noted previously, the Growth Plan characterizes the Town of Collingwood as a primary settlement area, consisting of a built-up area, designated greenfield areas, and identified intensification areas.

The built boundary defines the established built-up areas within the Town where the majority of development activity has typically occurred. Within the built-up boundary, the Town has identified specific intensification areas where compact and higher density development



**Figure 2-3: Town of Collingwood Urban Structure**

should be focused. As shown in Figure 2-3, Collingwood's intensification area encompasses corridors along Hume Street, Hurontario Street, and First Street, as well as the regional commercial district located at High Street and Mountain Road.

The Town's designated Greenfield area constitutes all vacant lands outside of the built boundary and within the Town's settlement boundary. The designated Greenfield area can be further characterized into two subcategories: those which are designated lands for urban uses and those areas which, due largely to agricultural and rural designations under the Official Plan, are identified as being lands not for urban uses.

The ECOP also identifies Secondary Plan Areas on Schedule A, which include both lands for intensification (i.e. within the built boundary) and

lands for greenfield development. Secondary Plan Areas indicate that more detailed secondary plan studies are necessary to guide the future urban development of those lands.



## 04 Growth Forecasts

This section provides a detailed overview of historic and forecasted population and employment growth for the Town of Collingwood. These projections are important inputs for the residential land needs analysis, employment land needs analysis, commercial market demand analysis, as well as the potential scenarios to year 2041.

It is important to note that Schedule 3 of the Growth Plan outlines a distribution of population and employment forecasts to 2041, and each upper-tier municipality is required to undertake a formal Municipal Comprehensive Review (MCR) process to allocate the growth to each corresponding lower-tier municipality. To date, the County of Simcoe has not yet completed its MCR and therefore has not allocated the 2041 growth to each lower-tier municipality through Schedule 7.

This Discussion Paper's forecasts to 2031 are consistent with the Town of Collingwood's 2019 Development Charge Background Study, prepared by Hemson Consulting, in support of the Growth Plan. However, forecasts to 2041 represent potential scenarios for the Town of Collingwood based on a variety of land use policy factors,

and may conflict with future growth allocation outlined in Schedule 7, once Simcoe County completes the MCR process.

### Growth Plan Forecast

The Growth Plan provides population and employment forecasts for upper-tier municipalities located in Greater Golden Horseshoe, including Simcoe County. Simcoe County's total population and employment growth is distributed among its local municipalities under Schedule 7, as a basis for planning to 2031.

Figure 3-1 shows that the population for the Town of Collingwood, under Schedule 7 of the Growth Plan, is forecasted at 33,400 persons. Employment has been forecasted at 13,500 jobs. The Town of Collingwood's population and employment in 2031 both amount to 5% of Simcoe County's total population and employment.

	Population	Employment
Simcoe County	667,000	254,000
Town of Collingwood	33,400	13,500

**Figure 3-1: Schedule 7, Population and Employment in 2031**

## Key Findings

1. The Growth Plan forecasts that Collingwood's population will grow to 33,400 persons and employment will grow to 13,500 jobs by 2031, which will both amount to 5% of Simcoe County's 2031 total population and employment.
2. Between 2016 and 2031, Collingwood's population is projected to grow by 10,931 persons, an average annual growth rate of 3.2%, and Collingwood's employment is projected to grow by 1,558 jobs at an average annual growth rate of 0.9%.
3. There appears to be a disconnect between projected population and jobs in the 2031 Growth Plan targets. Currently, Collingwood's employment base represents over 50% of the population in 2016, the 'activity rate'. However, employment growth projected to 2031 would represent an activity rate of only 14%. It is anticipated that a higher rate of employment growth will be required to support the projected population.
4. Collingwood's estimated seasonal population in 2016 was 6,183 persons. This is equivalent to approximately 28% of Collingwood's 2016 Census population, and 17.7% of dwelling units. It is assumed that this significant seasonal population will have an impact on inflow for retail and non-retail facilities in our commercial space analysis.
5. It is estimated that the Town will capture 10% of Simcoe County's total population growth between 2031 and 2041, amounting to a population of 41,500 persons by 2041, and that Collingwood's employment will achieve a 30% activity rate, resulting in 17,498 jobs by 2041.

## Residential Growth Forecasts

Figure 3-2 details the historic population for the Town of Collingwood and Simcoe County. Historical populations have been based on Statistics Canada Census data, adjusted for net undercoverage.

Between 2006 and 2016, Collingwood saw population growth of some 4,518 persons, at an annual growth rate of 2.5%. During the same period, Simcoe County added 56,198 persons and saw an annual growth rate of 1.3%. Collingwood's stronger growth rate is indicative of policies outlined in Schedule 6 of the Growth Plan that stipulate a significant portion of growth should be directed to lower-tier municipalities that contain primary settlement areas in the Simcoe sub-area.

	2006		2011		2016	2006-2016 Growth
<b>Town of Collingwood</b>	<b>17,951</b>		<b>19,796</b>		<b>22,469</b>	<b>4,518</b>
Annual Growth		369		535		452
Annual Growth Rate		2.1%		2.7%		2.5%
<b>Simcoe County</b>	<b>438,349</b>		<b>458,930</b>		<b>494,547</b>	<b>56,198</b>
Annual Growth		4,116		7,123		5,620
Annual Growth Rate		0.9%		1.6%		1.3%

**Figure 3-2: Historic Population Growth (2006-2016)**



## Seasonal Population

It is important to note that the population growth forecasts for the Town of Collingwood do not include population in unoccupied dwellings such as second/seasonal residences. In many municipalities that are subject to the Growth Plan, only a small portion of dwellings are occupied as second/seasonal homes. However, the seasonal population in Collingwood is significantly higher than other municipalities as the Town is considered in 'cottage country' as it is located in close proximity to Georgian Bay, ski and snowboard destinations, outdoor recreation attractions, and other seasonal towns including Wasaga Beach, The Blue Mountains, and Owen Sound. As shown in Figure 3-3, in 2016, 17.7% of dwellings in Town of Collingwood were considered seasonal.

	2006 Census	2011 Census	2016 Census	Growth 2006- 2016
Census Population	17,290	19,241	21,793	4,503
Total Private Dwellings	9,316	10,695	11,617	2,301
Less: Occupied by Usual Residents	7,318	8,339	9,556	2,238
Unoccupied and Seasonal Dwellings	1,998	2,356	2,061	63
Share of Dwellings that are Seasonal	<b>21.4%</b>	<b>22%</b>	<b>17.7%</b>	<b>2.8%</b>

Figure 3-3: Town of Collingwood Seasonal Dwellings (2006-2016)

	Town of Collingwood 2016
Seasonal Dwellings	2,061
Persons Per Household <sup>1</sup>	3.0
Estimated Seasonal Population	<b>6,183</b>

Figure 3-4: Town of Collingwood Seasonal Population, 2016

<sup>1</sup>Town of Collingwood Development Charges Background Study (2019), completed by Hemson Consulting Ltd.

Note: The vast majority of units in this category would be classified as seasonal rather than unoccupied.

As shown in Figure 3-4, Collingwood's estimated seasonal population in 2016 was 6,183 persons. This amounts to the equivalent of approximately 28% of Collingwood's 2016 Census population.

## 2031 Population Growth

The Town of Collingwood released an updated Development Charges Background Study in 2019. The Study includes population and employment forecasts for the Town to 2031, which was prepared in support of growth allocations outlined in Schedule 7 of the Growth Plan.

Figure 3-5 shows that the Town will grow by 10,931 persons between 2016 and 2031, amounting to a total population of 33,400 in 2031. This represents an average annual growth rate of 3.2% over the forecast period. As noted above, this growth does not include seasonal residents.

In general, the forecasts prepared in support of the Growth Plan are appropriate between 2016 and 2031, as they reflect how significant portions of Simcoe County's future growth will be allocated to Collingwood, as it is a primary settlement area. As a result, these forecasts have been utilized to estimate the population for Collingwood to 2041.

	2016	2019	2021	2026	2031	2016-2031 Growth
<b>Town of Collingwood</b>	<b>22,469</b>	<b>24,117</b>	<b>25,000</b>	<b>28,600</b>	<b>33,400</b>	<b>10,931</b>
Annual Growth	549	442	720	960		729
Annual Growth Rate	2.4%	1.8%	2.9%	3.4%		3.2%

**Figure 3-5: Projected Population Growth (2016-2031)**

Note: Forecast numbers have been rounded and adjusted for Census undercount

## 2041 Population Growth

Two potential population growth scenarios for the Town of Collingwood to 2041 are explored. This Discussion Paper projects future population growth to 2041 based on an assumed 10% and 15% share of Simcoe County's total growth.

Between 2031 and 2041, Schedule 3 in the Growth Plan states that Simcoe County is forecast to grow by 81,000 new residents – amounting to 497,000 persons in 2041. As shown in Figure 3-6, the two population growth scenarios differ by 4,100 persons. If the Town of Collingwood captures 10% of Simcoe County's total population growth, it will reach 41,500 persons by 2041. This translates to an annual average growth rate of 2.88%, which is indicative of reduced annual population growth over this period.

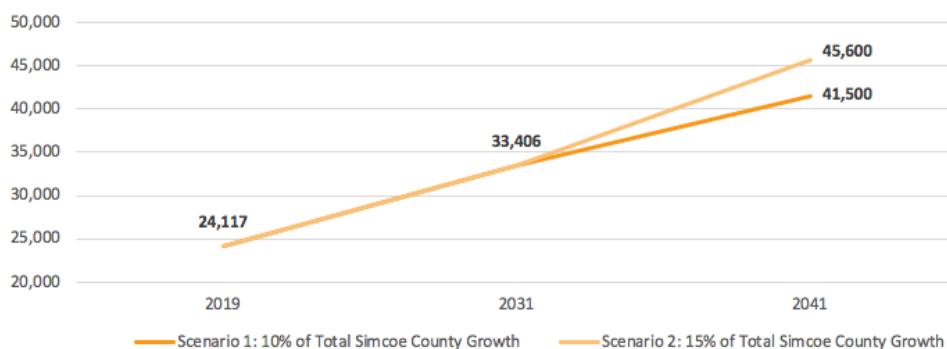


Figure 3-6: Collingwood Population Growth Scenarios to 2041

Alternatively, the Town of Collingwood could grow to 45,600 residents by 2041 if the municipality captures 15% of Simcoe County's total growth. As shown in Figure 11, this amounts to growth of 23,131 persons over the forecast period at an average annual growth rate 3.5%. It is our professional opinion that Scenario 2 should be considered a very aggressive growth scenario for the Town of Collingwood because it assumes a much higher growth rate than what has occurred historically and would exceed the presumed Growth Plan growth rates between 2016 to 2031.

The higher growth rate does not account for Collingwood's aging population, as well as finite residential land supply.

It is considered that Scenario 1 more accurately represents the Town of Collingwood's potential population growth to 2041. As such, that growth scenario has been utilized in the Residential Land Need and Commercial Demand analysis.

Population	2016	2019	2031	2041	2016-2041 Growth
Total Population	22,489	24,117	33,400	41,500	<b>19,031</b>
Census Net Undercoverage Rate	3.0%	3.0%	3.0%	3.0%	
Census Population	21,793	23,391	32,400	40,256	<b>18,463</b>
Household Population	21,084	22,630	31,346	38,946	<b>17,862</b>
Non-Household Population	709	761	1,054	1,310	<b>601</b>
Non-Household Population Rate	3.3%	3.3%	3.3%	3.3%	

**Figure 3-7: Collingwood Population in 2041, Scenario 1**

Note: Forecast numbers have been rounded

Population	2016	2019	2031	2041	2016-2041 Growth
Total Population	22,469	24,117	33,400	45,600	<b>23,131</b>
Census Net Undercoverage Rate	3.0%	3.0%	3.0%	3.0%	
Census Population	21,793	23,391	32,400	44,184	<b>22,391</b>
Household Population	21,084	22,630	31,346	42,746	<b>21,662</b>
Non-Household Population	709	761	1,054	1,437	<b>728</b>
Non-Household Population Rate	3.3%	3.3%	3.3%	3.3%	

**Figure 3-8: Collingwood Population in 2041, Scenario 2**

### Seasonal Population Forecast

Collingwood's seasonal population serves a critical function in retail and recreation spending for the local economy, and therefore, should be considered when planning for future municipal infrastructure expansion, residential land budgeting, and retail/service commercial space.

Figure 3-9 outlines Collingwood's potential seasonal population growth to 2041. To estimate seasonal population growth, the current 17.7% of total dwellings calculation has been maintained, and these units will be unoccupied by usual residents (seasonal/vacant) in 2031 and 2041. Maintaining this value is consistent with Collingwood's Residential Land Budget, however it conflicts with seasonal population projections in the Town of Collingwood Development Charges Background Study.

By 2031, the Development Charges Background Study estimates that 22% of total dwellings will be unoccupied by usual residents. It is considered that this growth is not reflective of historic trends for the Town of Collingwood, which show the share of seasonal dwellings gradually decreasing, and there are only a few current development projects that are being marketed as 'seasonal residences'. Further, as Ontario continues to see an aging population and Baby Boomer's transition into retirement, there is the potential to see many seasonal residents moving into their seasonal dwellings permanently. This would potentially translate into a larger number of existing dwellings being occupied by usual residents in the future, that are currently considered seasonal dwellings.

As shown in Figure 3-9, when the 2041 population is assumed at 41,500 persons (Scenario 1), it is estimated that Collingwood will have 3,925 seasonal dwellings and a seasonal population of 11,775 persons. This amounts to a total growth of 1,864 seasonal units and 5,592 persons within the forecast period.

	2016	2019	2031	2041	2016-2041 Growth
Seasonal Dwellings	2,061	2,282	3,164	3,925	1,864
Persons Per Household	3.0	3.0	3.0	3.0	
Estimated Seasonal Population	<b>6,183</b>	<b>6,845</b>	<b>9,492</b>	<b>11,775</b>	<b>5,592</b>

Figure 3-9: Town of Collingwood Seasonal Population Forecast



## Employment Growth Forecast

Figure 3-10 details resident occupation by industry in 2016. Consistent with Simcoe County as a whole, employment in Collingwood is primarily comprised of service-producing sectors, with a significant concentration of individuals employed in Accommodation and Food Services (14.5% of the total labour force), while Simcoe County only reported 7.3% in the same category. This, combined with a high concentration of employment in Retail Trade, signifies that Collingwood is a population-oriented employment hub that caters to a strong tourism and four-season recreation population.

Figure 3-10 additionally highlights that Collingwood has a smaller goods producing economy – amounting to only 17% of the total labour force. This has potential implications on the demand and utilization of employment area lands as goods producing sectors – such as manufacturing and utilities – are prominent users of employment areas.

**Figure 3-10: Occupation by Industry (2016 Census), Town of Collingwood and Simcoe County**

	<b>Town of Collingwood</b>	<b>Share of Total</b>	<b>Simcoe County</b>	<b>Share of Total</b>
Agriculture; Forestry; fishing and hunting	55	0.5%	3,745	1.5%
Mining; quarrying; oil and gas extraction	60	0.6%	730	0.3%
Utilities	40	0.4%	2,060	0.8%
Construction	895	8.4%	25,140	9.8%
Manufacturing	765	7.2%	27,900	10.9%
<b>Goods Producing Sectors Subtotal</b>	<b>1,815</b>	<b>17.0%</b>	<b>59,575</b>	<b>23.2%</b>
Wholesale trade	215	2.0%	9,545	3.7%
Retail trade	1330	12.5%	31,640	12.3%
Transportation and warehousing	230	2.2%	11,250	4.4%
Information and cultural industries	190	1.8%	4,380	1.7%
Finance and insurance	310	2.9%	6,760	2.6%
Real estate and rental and leasing	305	2.9%	4,885	1.9%
Professional; scientific and technical services	750	7.0%	13,000	5.1%
Management of companies and enterprises	10	0.1%	255	0.1%
Administrative and support; waste management and re-mediation services	620	5.8%	13,275	5.2%
Educational services	690	6.5%	16,605	6.5%
Health care and social assistance	1260	11.8%	27,985	10.9%
Arts; entertainment and recreation	405	3.8%	7,035	2.7%
Accommodation and food services	1540	14.5%	18,780	7.3%
Other services (except public administration)	490	4.6%	10,405	4.1%
Public administration	375	3.5%	16,575	6.5%
<b>Services-Producing Sectors Subtotal</b>	<b>8,720</b>	<b>81.8%</b>	<b>192,375</b>	<b>74.9%</b>
Individuals Working in Industries Not Applicable	120	1.1%	4,805	1.9%
<b>Total</b>	<b>10,655</b>	<b>100%</b>	<b>256,755</b>	<b>100%</b>

Figure 3-11 outlines the 2031 employment forecast for the Town of Collingwood, as indicated by the 2019 Development Charges Background Study. As shown, employment is forecast to reach 13,500 persons in 2031. This represents an average annual growth rate of 0.9% over this period.

Additionally, as noted in Schedule 5.1.2 (Simcoe Sub Area Map) of the Simcoe County Official Plan, Collingwood does not contain a Strategic Employment Area or District. As such, it is not anticipated that a major industrial or good-producing employer will locate in Collingwood during the forecast period.

	2016		2019		2021		2026		2031	2016-2031 Growth
<b>Town of Collingwood</b>	<b>11,942</b>		<b>12,233</b>		<b>12,432</b>		<b>12,951</b>		<b>13,500</b>	<b>1,558</b>
Annual Growth		97		100		104		110		104
Annual Growth Rate		0.8%		0.8%		0.8%		0.8%		0.9%

**Figure 3-11: Projected Employment Growth (2016-2031)**

	2006	2016	2031	2006-2016 Growth	2016-2031 Growth
<b>Collingwood Population</b>	<b>18,000</b>	<b>22,469</b>	<b>33,400</b>	<b>4,469</b>	<b>10,931</b>
<b>Collingwood Employment</b>	<b>10,800</b>	<b>11,942</b>	<b>13,500</b>	<b>1,142</b>	<b>1,558</b>
<i>Activity Rate</i>				26%	14%

**Figure 3-12: Collingwood Forecast Population and Employment Growth (2006-2031)**

### 2031 Employment Growth

It is important to recognize that population and employment projections to 2031 reflect Growth Plan targets. However, there appears to be a significant disconnect between projected population and jobs. In 2016, owing to its status as a major tourist and recreation centre, the employment base represented over 50% of the population. This ratio, also called the “activity rate” means that there is 1 job for every 2 residents.

As shown in Figure 3-12, between 2006 and 2016, the ratio of employment growth to population growth dropped to approximately 26%, which reflected minimal employment land job growth and increased competition for retail and service jobs from the neighbouring Town of Blue Mountains. However, employment growth projected to 2031 would represent an activity rate of only 14% for new growth. A higher rate of

future employment growth will almost certainly be required just to support the extent of the population growth projected.

For the purposes of this analysis, it has been assumed that a ratio of 30% jobs to population will provide sufficient employment to serve anticipated population growth, that the Town will be more competitive in terms of attracting service jobs to support the tourism industry, and that there will be some future employment land job growth.

### 2041 Employment Growth

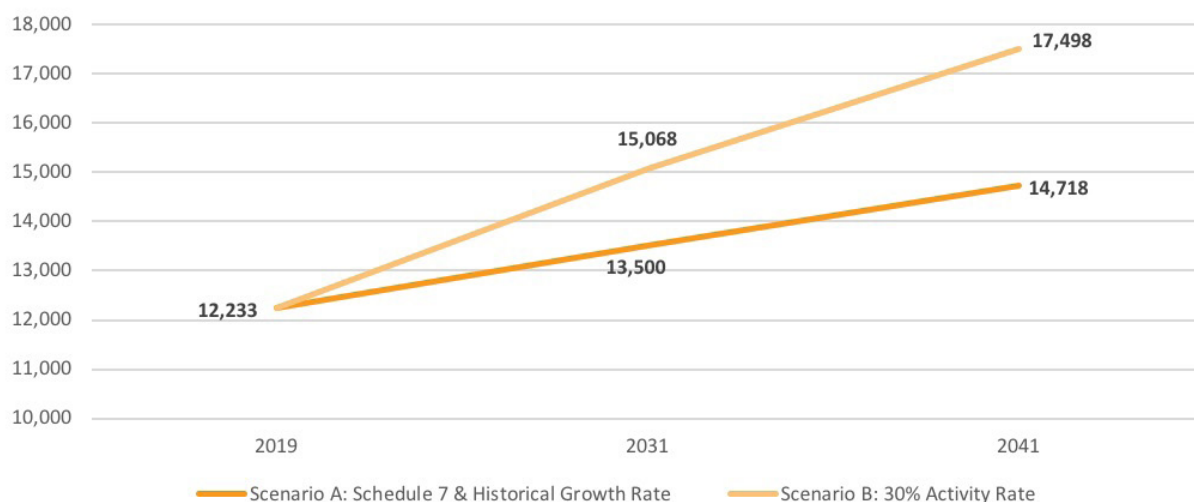
Two potential employment growth scenarios for the Town of Collingwood to 2041 have been prepared, as follows:

> **Scenario A** maintains the Schedule 7 employment value of 13,500, and projects employment growth to 2041 by maintaining the average annual growth rate of 0.9% between 2031 and 2041. This growth rate is reflective of annual employment growth trends included in the Town's Development Charges Background Study between 2016 and 2031. As shown, Collingwood has the potential

to add 2,776 persons employed between 2016 and 2041, amounting to 14,718 jobs in 2041; and,

> **Scenario B** has determined the 2031 and 2041 employment values based on an assumed activity rate of 30%. This activity rate is considered to be more consistent with historic trends, and accounts for the Town's future commercial development and the high number of population-related employment jobs required to support the tourism industry and population growth. As shown, Collingwood has the potential to include 17,498 persons employed in 2041.

As shown in Figure 3-13, the two employment growth scenarios differ by 1,568 jobs in 2031 and 2,780 jobs in 2041. Again, it is believed that Scenario B more accurately represents the Town of Collingwood's potential employment growth to 2041. Scenario B has been used to forecast the Employment Land Need to 2041.



**Figure 3-13: Potential Employment Growth Scenarios to 2041**

## Income Growth

Per capita income levels provide a reasonable guide for determining the retail expenditure habits of the local population living within a defined area. Although certain intervening variables, including age and geographic location, can influence consumer expenditure habits and shopping preferences, population groupings with similar income characteristics tend to exhibit similar expenditure habits for broad merchandise groupings.

As shown in Figure 3-14, the 2015 per capita income levels for residents living in the Town of Collingwood and Simcoe County have been calculated. These calculations are based on 2016 Statistics Canada Census data, and are used to inform the commercial needs analysis.

The Town of Collingwood had a per capita income level of \$27,194 in 2015, while Simcoe County had a moderately higher per capita income of \$28,650. Both are more than 20% lower than the Provincial average. This is reflective of Collingwood's primarily services-producing economy and the high concentration of employment in Accommodation and Food Services and Retail Trade sectors.

Despite the Town of Collingwood's lower per capita income levels, the Town benefits from its proximity to unique recreational amenities that attract a significant seasonal population from individuals all over Southern Ontario, as well as a four-season tourism population. Additionally, Collingwood is adjacent to Ontario's premier ski and snowboard destinations, including Blue Mountain, and a number of private ski clubs, such as Osler Bluff, and Craighleith.

The income characteristics noted above reflect only the incomes from permanent residents. It would be expected that tourist and seasonal residents would significantly boost the spending potential of the local population.

	Town of Collingwood	Simcoe County
<b>2016 Population<sup>1</sup></b>	21,793	479,650
<b>Males 15 yr+ with income</b>	8,415	191,410
<b>Male Average Income</b>	\$37,467	\$42,095
<b>Females 15 yr+ with income</b>	9,615	200,775
<b>Female Average Income</b>	\$28,845	\$28,313
<b>Total Income</b>	\$592,629,480	\$13,741,946,525
<b>Average Per Capita Income</b>	<b>\$27,194</b>	<b>\$28,650</b>

**Figure 3-14: Per Capita Income in 2015, Town of Collingwood and Simcoe County**

<sup>1</sup>Excluding undercount

## 05 Land Needs Assessment

### Residential Land Need

This section explores the County of Simcoe Residential Land Budget created for the Town of Collingwood, and analyzes residential demand to 2031. Additionally, it analyzes potential growth scenarios for Collingwood when population is forecast to 2041 and explores how that will impact future residential land supply. It is important to note that the 2041 forecasts represent potential scenarios for the Town based on a variety of land use policy factors and demographic trends, and may differ from the future growth allocation outlined in Schedule 7 when Simcoe County completes its MCR.

### County of Simcoe Residential Land Budget

Hemson Consulting Ltd. was retained by Simcoe County to prepare a residential land budget in 2016. The residential land budget was prepared in the context of the 2013 Growth Plan, specifically in reference to the included population and employment forecasts that the County and its municipalities must utilize as the basis of planning through to 2031. This template utilized relevant data to determine if the allocated population for each local municipality under Schedule 7, can be accommodated based on the current supply of designated residential lands.

With respect to the purpose of this Discussion Paper, the fundamental assumptions outlined in the original residential land budget, combined with moderate adjustments to the housing supply inputs were utilized in order to reflect more current development activity in Collingwood.

### Residential Land Budget

The Town of Collingwood's Residential Land Budget assesses the number of additional housing units required to accommodate population growth through to 2031. It looks specifically at housing units, as the key variable for residential land demand, in addition to demand for seasonal and recreational units that are not occupied by permanent residents at the time of the budget. It also considers the number of future housing units anticipated in the municipality. This is based on the number of units approved and future unit potential for the area, based on existing planning permissions.

Figure 5-1 indicates that the land budget for the Town of Collingwood forecasts a municipal wide demand of 6,215 housing units between 2016 and 2031. By comparison, it forecasts a potential unit supply of 9,514 units. These values are based on population growth for Collingwood as outlined in Schedule 7 of the Growth Plan – growth of 14,159 persons between 2016 and 2031. In conclusion, the County's residential land budget forecasts that there will be a surplus supply of 3,298 potential housing units in Collingwood by

Town of COLLINGWOOD Municipal Residential Land Budget - Summary Results, 2017				
Growth Plan Policy Area	2016-2031			Difference Potential Unit Surplus at 2031
	Schedule 7 Population Growth	Demand Housing Units Needed	Supply Unit Potential	
Delineated Built Boundaries and Undelineated Built-Up Areas	5,246	2,486	4,008	1,522
Designated Greenfield Areas	8,913	3,729	5,506	1,777
Outside Settlement Areas	-	-	-	-
<b>Municipal-wide</b>	<b>14,159</b>	<b>6,215</b>	<b>9,514</b>	<b>3,298</b>
This table summarizes the overall results for the local municipal residential land budget. The land budget examines the relationship between demand for additional housing units deriving from Schedule 7 forecast population growth and the municipality's available unit supply. The land supply analysis looks at housing units because this is the variable which requires land.  Please refer to the Res-Detailed, Supply and Census Data sheets for more information on the inputs, assumptions and calculations underlying the analysis.	This is the number of additional permanent household residents that will need to be accommodated to meet the Schedule 7 forecast.	This is the number of additional housing units required to accommodate forecast population growth under Schedule 7 plus demand for seasonal and recreational units, not occupied by permanent residents.	This is the future housing unit potential based on currently approved units and additional unit potential through existing planning permissions.	This is the difference between the available unit supply and the anticipated unit demand.  If a positive figure is indicated, there is sufficient supply identified to meet forecast demand.  If a negative figure is indicated, there is a potential shortage of available supply to meet forecast demand. This is the starting point for evaluating further intensification potential or need for additional urban lands.

Figure 5-1: Town of Collingwood Municipal Residential Land Budget – Summary Results, 2017



## Key Findings

### Residential Land Need

1. Collingwood's forecast population growth between 2016 and 2031 results in demand for an additional 6,216 housing units. Based on the local municipal intensification targets from the original land budget, 2,486 units are required within the built boundary with the remaining 3,729 units located in the Designated Greenfield Area.
2. The combination of completed units between 2016-2019, registered and draft approved plans, and future unit potential on all vacant lands results in a supply of 9,621 housing units. When compared to the demand of 6,216 housing units, there will be a surplus of 3,405 housing units in Collingwood by 2031.
3. Two potential growth scenarios were analysed to forecast residential land supply in 2041. Both Scenario A and B are based on a higher level of intensification than assumed in the County's land budget. Scenario A maintains the County of Simcoe Land Budget's existing Local Municipal Intensification Target, while Scenario B's targets have been adjusted.
4. Between 2016 and 2041, we estimate there will be demand for 10,504 additional housing units to support the projected population of 41,500 persons and the seasonal population of 11,775 persons.
5. In both scenarios, the Town will have a shortfall of 883 housing units by 2041. The population growth forecast to 2041 suggests that a further supply of residential units and land would be needed to support and sustain the growing population of Collingwood.

### Employment Land Need

1. Two potential growth scenarios were analyzed to forecast employment land supply in 2031. Scenario A maintains the existing assumptions from the County's Land Budget and the Schedule 7 employment target of 13,500 jobs, providing a job to population ratio of 14% for new growth. In our opinion, this target does not provide for sufficient jobs to serve the anticipated growth in population.

As a result, Scenario B has been prepared, which uses a 30% job to population ratio for the period 2017 to 2031. This results in an adjusted the employment level of 15,068 jobs by 2031 based on a 30% activity rate.

2. The net vacant developable supply of employment lands in Collingwood is estimated at 113.5 hectares. Most of this land is in the industrial park to the southeast, with some along Stewart Road and Mountain Road/Tenth Line. While there are some prominent industrial users, many of the employment land parcels are occupied by non-traditional employment land users.
3. Based on the employment growth between 2017 and 2031, Scenario A estimates the growth of 1,462 jobs, and Scenario B estimates 3,030 new jobs. Both scenarios assume that employment land employment accounts for 21% of the total - resulting in 398 and 824 jobs located on employment lands for Scenario A and B, respectively. The 21% rate is consistent with the rate used in the County's Land Budget.
4. Both scenarios forecast that Collingwood will have a surplus of employment lands by 2031, with a demand for 20 hectares of employment land in Scenario A and 41 hectares in Scenario B. This translates to an excess of 77 and 55 hectares of employment land for Scenario A and Scenario B, respectively.
5. The 2041 employment land growth assumes that the Town will add 5,460 new jobs between 2017 and 2041, resulting in a total of 17,498 jobs in 2041.
6. An estimated 1,486 new jobs will be located on employment lands in 2041, which results in an employment land need of 74 hectares, and a surplus of 22 hectares in 2041.
7. In recent years, employment land absorption in the Town has been very slow. The surpluses identified in this study may be larger, if absorption is not accelerated either through increased market attraction or economic development initiatives.

2031.

### Residential Land Budget Update

To understand Collingwood's current residential land supply for the purposes of this Discussion Paper, the County's residential land budget template has been replicated, with some adjustments. The detailed calculations have been included as Appendix I. Overall:

- > The residential land need to 2031 has utilized the same fundamental assumptions that were used as part of the original Residential Land Budget, including the 2016 and 2031 population, household population, share of seasonal and vacant units, the local municipal intensification target, and the share of growth in the designated greenfield areas. However, the template was updated to account for units completed since the land budget work was conducted (January 1, 2017 to December 31, 2019);
- > Based on development activity information received from the Town, the Registered and Draft Approved units for both the Delineated Built-Up Area and the Designated Greenfield Areas have been updated. Further, the number of units considered under "unit potential on vacant DGA lands for urban uses" based on Table 15 of the Town of Collingwood's Transportation Study completed in August 2019 have been revised. The unit potential was adjusted based on a comparison to active development applications, as well as an aerial scan of Collingwood to determine if the projects were currently under construction or had already been delivered to market;
- > The original assumptions related to "unit potential on all vacant lands not for urban uses" has been maintained. The Town of Collingwood is not supportive of development in the Designated Greenfields Areas that are not for urban use, and does not direct growth to these areas. There will be no development in these areas over the forecast period; and,
- > The residential land budget template to forecast growth to 2041 has been utilized. In doing so, the existing 2016 population of 22,470 persons and the 2031 population of 33,400, has been maintained, but applied a 2041 population of 41,500 persons for Collingwood. As noted previously, the 2041

population assumes that Collingwood will attract 10% of County growth between 2031 and 2041. All values have been adjusted for undercount. Further, the number of units considered under "unit potential on vacant DGA lands for urban uses" based on Table 15 and Table 16 of the Town of Collingwood's Transportation Study completed in August 2019 have been adjusted. As part of this 2041 forecast, two scenarios: Scenario A which maintains the existing local municipal intensification target, and Scenario B where the local municipal intensification target has been adjusted upwards. The Assumed Housing Mix by Type ratio for the Designated Greenfield Areas in both scenarios have been adjusted to account for the development of a higher proportion of townhome units after 2031, which is reflective of emerging trends.

### 2031 Residential Land Need

As shown in Figure 5-2, Collingwood's anticipated population growth between 2016 and 2031 results in demand for an additional 6,216 housing units.

	2016	2031	2016-2031 Change
Total Occupied Units	9,556	14,669	5,113
Seasonal and Vacant Units	2,061	3,164	1,103

**Figure 5-2: Total Housing Unit Demand (2016-2031)**

	2016	2031	2016-2031 Change
<b>Total Units</b>	<b>11,617</b>	<b>17,833</b>	<b>6,216</b>

Figure 5-3 outlines the distribution of housing unit demand by the three policy areas that make up the Town of Collingwood's municipal structure. The local municipal intensification target for the Delineated Built Up Area, as well as the share of growth in Designated Greenfield Areas and Outside Settlement Areas are consistent with the Town of Collingwood's current planning objectives, and have been maintained from

	2016-2031
<b>Total Unit Growth</b>	<b>6,216</b>
Local Municipal Intensification Target	40%
<b>Demand</b>	<b>2,486</b>
Share of Growth in Designated Greenfield Areas	60%
<b>Demand</b>	<b>3,729</b>
Share of Growth Outside Settlement Areas	0%
<b>Demand</b>	<b>0</b>
<b>Total All Growth Plan Areas</b>	<b>6,216</b>

**Figure 5-3: Distribution of Housing Unit Demand by Policy Area, 2031**

the 2016 residential land budget. This results in demand for 2,486 units in the Delineated Built Up Area and 3,729 units in the Designated Greenfield Area, with no demand located Outside Settlement Areas.

Figure 5-4 compares total housing unit demand to total housing unit supply, to determine the sufficiency of the existing residential supply in Collingwood in 2031. As shown, there is land available to deliver 9,621 new housing units to the Collingwood market by 2031. Supply values

		2016-2031
	Inside Delineated Built Up Areas	2,486
Demand (units)	In Designated Greenfield Areas	3,729
	Outside Settlement Areas	0
	Total	6,216
	Inside Delineated Built Up Areas	3,813
Supply (units)	In Designated Greenfield Areas	5,808
	Outside Settlement Areas	0
	Total	9,621
	Inside Delineated Built Up Areas	1,327
Sufficiency of Supply (units)	In Designated Greenfield Areas	2,079
	Outside Settlement Areas	0
	Total	3,405

**Figure 5-4: Surplus of Housing Unit Supply, 2031**

are based on updated municipal data, including: registered and draft approved plans, complete applications pending approval; and future unit potential on all vacant lands within the three policy areas.

Based on the updated residential land budget, it is understood that there is a healthy number of housing units being delivered to the Collingwood market, and that there will be enough supply to meet housing demand by 2031. While the surplus is modestly higher than the original results of the County's 2016 Residential Land budget, it reflects more recent housing uptake and discussions with the Town regarding residential land supply. Both projections included in this Discussion Paper and those in the County's Land Budget indicate that there will be a sufficient residential land supply to meet the population as outlined for 2031 in Growth Plan.

It is important to note that there are a significant number of housing units being planned for the Designated Greenfield Areas, resulting in a surplus of 2,079 housing units. This is largely due to a substantial number of row housing units

Total Unit Growth 2016-2031 in the DGA					
		Single/ Semi	Row	Apt	Total
Demand	Assumed housing mix by type	55%	20%	25%	100%
	Housing growth by type	2,051	746	932	3,729
Supply in Designated Greenfield	Units uncompleted Census day 2016 <sup>1</sup>	82	55	0	137
	Units completed Jan 1 2017 to Dec 31, 2019 <sup>2</sup>	249	228	0	477
	Registered and Draft Approved <sup>3</sup>	1,437	2,019	641	4,097
	Complete Applications	-	-	-	0
	Forecast of unit potential on vacant DGA lands for urban uses <sup>4</sup>	901	132	64	1,097
	Forecast of unit potential on vacant DGA lands not for urban uses	0	0	0	0
	DGA supply excluding lands not for urban uses	2,669	2,434	705	5,808
	DGA supply including lands not for urban uses	2,669	2,434	705	5,808
Sufficiency of Supply	Excess/shortfall of supply at 2031	618	1,688	-277	2,079
	Excess/shortfall of supply at 2031 on all DGA lands	618	1,688	-277	

**Figure 5-5: Housing Supply in Designated Greenfield Areas, 2031**

<sup>1</sup> County of Simcoe 2016 Residential Land Budget for the Town of Collingwood

<sup>2</sup> CMHC Starts and Completions Survey – Historical Completions by Dwelling Type

<sup>3</sup> Development Activity Map – January 2020, provided by the Town of Collingwood Planning Division

<sup>4</sup> Town of Collingwood Medium and Long Term Development Horizon (Occupied in 2031 & 2041)

proposed for the Designated Greenfield Area, as shown in Figure 5-5. The development of more row housing units is consistent with local and Provincial planning policies relating to density and affordability.

Row houses are generally more affordable than single-detached homes, which is an attractive option for young families and first-time homebuyers looking to purchase ground-related housing. Additionally, attached units allow for denser development patterns and a higher yield of units for the developer, as well as reduced horizontal infrastructure requirements.

As shown in Figure 5-6, there is enough residential supply to accommodate projected population growth in Collingwood. There is a

surplus of 3,405 housing units when projected to 2031. The estimated population growth has been determined based on a 2.11 PPU for the Delineated Built-Up Area, and 2.39 for the Designated Greenfield Area. These PPU values are consistent with the assumptions used in the original residential land budget, and are low because they are calculated with seasonal units that have no population. Based on these PPU values, the 2016-2031 housing unit supply will house some 14,159 persons. This value is approximately 3,200 persons higher than the forecast growth in population within the same period, which amounts to 10,930 persons between 2016 and 2031. This assumption, which is consistent with the County Land Budget, assumes that there will be a corresponding decrease in the population in units existing in

2016. Assuming some decline in existing units is commonly used in population forecasting to account for the aging population and evolving household occupancy patterns. The decline assumed in the Land Budget was relatively large and for 2041, an assumption has been made that

there would be no further decline in the units existing as of 2016.

The results of the updated residential land budget modestly differ from the County's 2016 land budget as the values have been adjusted to reflect present-day development activity. The

		2016-2031 Units	PPU	2016-2031 Population
<b>A. Demand by Growth Plan Policy</b>	Growth Inside Delineated Built Up Areas	2,486	2.11	5,246
	Growth outside the Settlement Areas	0	0	0
	Growth in the Designated Greenfield Areas	3,729	2.39	8,913
<b>B. Supply by Growth Plan Policy Area</b>	Total supply inside Delineated Built Up Areas	3,813	2.11	8,045
	Total supply outside the Settlement Areas	0	0	0
	Total supply in all Designated Greenfield Areas	5,808	2.39	13,881
<b>C. Surplus (or deficit) by Growth Plan Policy Area</b>	Delineated Built Up Areas	1,327	-	2,799
	Outside Settlement Areas	0	-	0
	Designated Greenfield Areas	2,079	-	4,968
<b>D. Sufficiency of Supply</b>	Total Demand	6,216	-	14,159
	Total Supply	9,621	-	21,927
	<b>Surplus or (Deficit)</b>	<b>3,405</b>	<b>-</b>	<b>7,767</b>

Figure 5-6: Summary of Future Housing Unit Need, 2031



estimated surplus of 3,405 units is approximately 100 units higher than the original residential land budget surplus of 3,298; which could potentially be due to site plan changes and larger unit yields due to the development of more row housing. The data used to inform the total supply within all three policy areas was provided by the Town of Collingwood.

### Residential Land Need: 2041 Scenarios

As part of this Discussion Paper, housing growth scenarios for the Town of Collingwood have been analyzed when population is forecast to 41,500 persons in 2041, based on the assumption that the Town will attract 10% of the County's population growth between 2031 and 2041. As shown in Figure 5-7 it is estimated that there will be demand for 10,504 new housing units in Collingwood between 2016 and 2041.

	2016	2031	2041	2016-2041 Change
<b>Total Occupied Units</b>	9,556	14,669	<b>18,196</b>	8,640
<b>Seasonal and Vacant Units</b>	2,061	3,164	<b>3,925</b>	1,864
<b>Total Units</b>	11,617	17,833	<b>22,121</b>	<b>10,504</b>

**Figure 5-7: Total Housing Unit Demand (2016-2041)**

The value for total occupied units was calculated based on an average PPU of 2.15 in 2041, which has been held constant from 2031. The PPU calculation includes vacant and seasonal units which are assigned no population. It is important to note that this PPU may differ from future growth projections when Simcoe County completes the MCR process. The seasonal and vacant unit value is based on the assumption that these units will continue to represent 17.7% of the total supply.

Two potential residential land budget scenarios for 2041 have been tested. The purpose of these scenarios is to investigate how estimated population growth will impact future residential land supply, and to provide the Town of Collingwood with a high-level understanding of how to plan for a potential surplus/deficit of

housing supply in 2041. The two scenarios are detailed below:

- > **Scenario A:** Maintains local municipal intensification Targets of 40% of growth in the Delineated Built Up Area and 60% of growth in the Designated Greenfield Areas. No growth has been directed to outside the settlement areas. Further, housing demand and assumed density within Designated Greenfield Areas has been adjusted by reducing Single/Semi-detached to 45%, increasing Row to 30%, and maintaining Apartment at 25% of assumed growth; and,
- > **Scenario B:** Adjusted the local municipal intensification target to 50% in the Delineated Built Up Area and 50% in the Designated Greenfield Areas. No growth has been directed to outside settlement areas. Further, housing demand and assumed density have been adjusted within Designated Greenfield Areas by reducing Single/Semi-detached to 45%, increasing Row to 30%, and maintaining Apartment at 25% of assumed growth.

Scenario B directs more growth to the Delineated Built Up Area to encourage more intensification and infill development. Both 2041 scenarios assume a denser Designated Greenfield Area, which is reflective of the Town's planning objectives of encouraging compact, sustainable development. It is also responsive to recent development trends in Collingwood as current development and planning applications propose a particularly higher proportion of townhouse and row housing.

Figure 5-8 outlines the distribution of housing unit demand by the Town's policy areas for both scenarios. In Scenario A, the local municipal intensification target for the Delineated Built Up Area, as well as the share of growth in Designated Greenfield Areas and Outside Settlement Areas have been maintained from the 2016 residential land budget. This results in demand for 4,202 units in the Delineated Built Up Area and 6,302 units in the Designated Greenfield Area, with no demand located Outside Settlement Areas.

In comparison, in Scenario B, the share of growth has been equally divided between the Delineated Built Up Areas and Designated Greenfield Areas – amounting to demand for 5,252 units in both policy areas.

	Scenario A 2016-2041	Scenario B 2016-2041
<b>Total Unit Growth</b>	<b>10,504</b>	<b>10,504</b>
Local Municipal Intensification Target	40%	50%
<b>Demand</b>	<b>4,202</b>	<b>5,252</b>
Share of Growth in DGA	60%	50%
<b>Demand</b>	<b>6,302</b>	<b>5,252</b>
Share of growth outside Settlement Areas	0%	0%
<b>Demand</b>	<b>0</b>	<b>0</b>
<b>Total All Growth Plan Areas</b>	<b>10,504</b>	<b>10,504</b>

**Figure 5-8: Distribution of Housing Unit Demand by Policy Area, 2041**

		Scenario A	Scenario B
	Inside Delineated Built Up Areas	4,202	5,252
<b>Demand (units)</b>	In Designated Greenfield Areas	6,302	5,252
	Outside Settlement Areas	0	0
	<b>Total</b>	<b>10,504</b>	<b>10,504</b>
	Inside Delineated Built Up Areas	3,813	3,813
<b>Supply (units)</b>	In Designated Greenfield Areas	5,808	5,808
	Outside Settlement Areas	0	0
	<b>Total</b>	<b>9,621</b>	<b>9,621</b>
	Inside Delineated Built Up Areas	-389	-1,439
<b>Sufficiency of Supply (units)</b>	In Designated Greenfield Areas	-494	556
	Outside Settlement Areas	0	0
	<b>Total</b>	<b>-883</b>	<b>-883</b>

**Figure 5-9: Deficit of Housing Unit Supply, 2041**

Figure 5-9 compares total housing unit demand to total housing unit supply, to determine the sufficiency of the existing residential supply in Collingwood in both 2041 scenarios. Supply values are based on updated municipal data, including: registered and draft approved plans, complete applications pending approval; as well as unit potential on all vacant lands within for the three policy areas.

Figure 5-9 shows that in 2041, both Scenario A and Scenario B result in insufficient supply to meet demand, amounting to a deficit of 883 housing units. In Scenario A, both the Delineated Built Up Areas and Designated Greenfield Areas have insufficient supply. However, in Scenario B, the Delineated Built Up Areas has a significant deficit, while the Designated Greenfield Areas has enough supply to meet housing demand - a surplus of 556 housing units. The discrepancies are due to the changes to the local municipal intensification targets. Overall, this indicates that in both scenarios there is not sufficient supply to meet the population projected for 2041.

Figure 5-10 and Figure 5-11 detail the housing supply in the Designated Greenfield Areas for Scenario A and Scenario B. By maintaining the municipal intensification target and adjusting the assumed mix of housing type, Scenario A results in a shortfall of 494 units in 2041. Similar to the previous 2031 model, there are deficits in single-/semi-detached and apartment units, while there is a surplus of row housing units. This is reflective of the registered, draft approved, and forecasted housing applications for the Town which propose a significant amount of townhouse and row house development.

The scenarios suggest that potential policy and incentive changes may be required to encourage and accommodate more development within the Delineated Built Up Areas by 2041. Only Scenario A would require that more Greenfield land be added.

Total Unit Growth 2016-2041 in the DGA					
		Single/Semi	Row	Apt	Total
Demand	Assumed housing mix by type	45%	30%	25%	100%
	Housing growth by type	2,836	1,891	1,576	6,302
Supply in Designated Greenfield	Units uncompleted Census day 2016 <sup>1</sup>	82	55	0	137
	Units completed Jan 1 2017 to Dec 31, 2019 <sup>2</sup>	249	228	0	477
	Registered and Draft Approved <sup>3</sup>	1,437	2,019	641	4,097
	Complete Applications	-	-	-	-
	Forecast of unit potential on vacant DGA lands for urban uses <sup>4</sup>	901	132	64	1,097
	Forecast of unit potential on vacant DGA lands not for urban uses	0	0	0	0
	DGA supply excluding lands not for urban uses	2,669	2,434	705	5,808
	DGA supply including lands not for urban uses	2,669	2,434	705	5,808
Sufficiency of Supply	Excess/shortfall of supply at 2041	-167	543	-871	-494
	Excess/shortfall of supply at 2041 on all DGA lands	-167	543	-871	

**Figure 5-10: Housing Supply in Designated Greenfield Areas, Scenario A: 2041**
<sup>1</sup> County of Simcoe 2016 Residential Land Budget for the Town of Collingwood

<sup>2</sup> CMHC Starts and Completions Survey – Historical Completions by Dwelling Type

<sup>3</sup> Development Activity Map – January 2020, provided by the Town of Collingwood Planning Division

<sup>4</sup> Town of Collingwood Medium and Long Term Development Horizon (Occupied in 2031 & 2041)

Total Unit Growth 2016-2041 in the DGA					
		Single/Semi	Row	Apt	Total
Demand	Assumed housing mix by type	45%	30%	25%	100%
	Housing growth by type	2,363	1,576	1,313	5,252
Supply in Designated Greenfield	Units uncompleted Census day 2016 <sup>1</sup>	82	55	0	137
	Units completed Jan 1 2017 to Dec 31, 2019 <sup>2</sup>	259	228	0	477
	Registered and Draft Approved <sup>3</sup>	1,437	2,019	641	4,097
	Complete Applications	-	-	-	-
	Forecast of unit potential on vacant DGA lands for urban uses <sup>4</sup>	901	132	64	1,097
	Forecast of unit potential on vacant DGA lands not for urban uses	0	0	0	0
	DGA supply excluding lands not for urban uses	2,669	2,434	705	5,808
	DGA supply including lands not for urban uses	2,669	2,434	705	5,808
Sufficiency of Supply	Excess/shortfall of supply at 2041	306	858	-608	556
	Excess/shortfall of supply at 2041 on all DGA lands	306	858	-608	

**Figure 5-11: Housing Supply in Designated Greenfield Areas, Scenario B: 2041**
<sup>1</sup> County of Simcoe 2016 Residential Land Budget for the Town of Collingwood

<sup>2</sup> CMHC Starts and Completions Survey – Historical Completions by Dwelling Type

<sup>3</sup> Development Activity Map – January 2020, provided by the Town of Collingwood Planning Division

<sup>4</sup> Town of Collingwood Medium and Long Term Development Horizon (Occupied in 2031 & 2041)

		2041 Scenario A			2041 Scenario B		
		2016-2041 Units	PPU <sup>1</sup>	2016-2041 Population	2016-2041 Units	PPU <sup>1</sup>	2016-2041 Population
<b>A. Demand by Growth Plan Policy</b>	Growth Inside Delineated Built Up Areas	4,202	2.00	8,403	5,252	2.00	10,504
	Growth outside the Settlement Areas	0	0	0	0	0	0
	Growth in the Designated Greenfield Areas	6,302	2.22	13,991	5,252	2.22	11,659
<b>B. Supply by Growth Plan Policy Area</b>	Total supply inside Delineated Built Up Areas	3,813	2.00	7,626	3,813	2.00	7,626
	Total supply outside the Settlement Areas	0	0	0	0	0	0
	Total supply in all Designated Greenfield Areas	5,808	2.22	12,894	5,808	2.22	12,894
<b>C. Surplus (or deficit) by Growth Plan Policy Area</b>	Delineated Built Up Areas	-389		-777	-1,439		-2,878
	Outside Settlement Areas	0		0	0		0
	Designated Greenfield Areas	-494		-1,097	556		1,234
<b>D. Sufficiency of Supply</b>	Total Demand	10,504		22,394	10,504		22,163
	Total Supply	9,621		20,520	9,621		20,520
	<b>Surplus or (Deficit)</b>	<b>-883</b>		<b>-1,874</b>	<b>-883</b>		<b>-1,643</b>

**Figure 5-12: Summary of Future Housing Unit Need, 2041**

<sup>1</sup> These PPU values were determined by urbanMetrics inc., and may potentially differ from the results of the forthcoming Simcoe County MCR process.

In contrast, by adjusting the municipal intensification target to direct less growth to the Designated Greenfield Area, and adjusting the assumed mix of housing by type, Figure 5-11 indicates the Designated Greenfield Area would result in a surplus of 556 units. Both single-/semi-detached and row units result in surplus units, however there is insufficient supply of apartment units. This analysis highlights that while directing less housing growth to the Designated Greenfield Area could result in a moderate surplus, overall, Collingwood does not have sufficient residential land and planned housing supply to meet demand by 2041.

In consolidating the numbers from the previous figures, Figure 5-12 summarizes and indicates that there is not enough residential land supply to accommodate projected population growth

in either growth scenario to 2041. As shown, there is a deficit of 883 housing units in both scenarios. Population growth was forecast based on a blended PPU of 2.0 for the Delineated Built Up Area, and 2.22 within the Designated Greenfield Area, amounting to an estimated population of some 22,394 persons in Scenario A and 22,163 persons in Scenario B. Similar to the 2031 residential land budget, these estimated population values are between 3,100-3,300 residents higher than the net forecast population growth between 2016 and 2041, which is some 19,030 persons. The difference would be the decline in population in existing (2016) units which was maintained from the 2031 projections. Both growth scenarios to 2041 suggest that a further supply of residential units and land supply would be needed to support and sustain the growing population of Collingwood.

## Employment Land Need

This section explores the Employment Land Budget that was prepared for the Town of Collingwood in 2016, and assesses how demand for employment area land has changed when population is forecast to 2031. Additionally, it explores how employment land absorption is impacted when employment is forecast to 2041, and offers potential scenarios that would impact future supply.

### Employment Land Budget

Hemson Consulting Ltd. was retained by Simcoe County to prepare an employment land budget template. Similar to the residential land budget template, this template utilizes total employment forecasts for the Town of Collingwood as identified in Schedule 7 of the Growth Plan.

The employment land budget divides demand into three land base categories, and makes an assumption relating to how much of the forecast employment will occur on each of these land-categories:

- > **Employment-land employment:** refers to traditional industrial-type employment primarily accommodated in low-rise industrial buildings in business parks, employment areas, and designated industrial land. These lands are the primary focus of employment land budgets;
- > **Population-related employment:** refers to employment that serves a resident population and includes retail, education, healthcare, and local government. This category of employment typically grows in line with population growth; and,
- > **Rural-based employment:** includes jobs scattered throughout the rural area, primarily related to agricultural and primary industries.

Figure 5-13 details the results of the original employment land budget. As shown, the Town of Collingwood forecasts employment land need of 34 hectares through to 2031. These values are based on anticipated employment growth for Collingwood between 2011 and 2031.

As shown, the employment land budget forecasts there will be an excess of 62 hectares of employment land in 2031 – based on a long-term development supply of 96 hectares. This analysis highlights that Collingwood has sufficient employment land supply to meet projected employment and population projections to 2031.

Supply	Net vacant developable supply	113.5
	Adjustment for long-term vacancy and underutilization	0.85
	Long-term development supply	96
Demand	Employment land need (ha)	34
Result (Supply - Demand)	Sufficiency of Supply: Excess vs Shortage (ha)	62

Figure 5-13: Simcoe County Employment Land Budget Results (2011-2017)

### Employment Land Budget Update

To understand Collingwood's current employment land supply for the Town's Official Plan Update, a replication of the employment land budget template created by Hemson Consulting Ltd. was made with some adjustments.

- > The original employment land budget is based on a 2017 inventory of employment land, but the 2011 employment numbers of the Town. This means the forecast calculations do not account for six years of employment growth. The numbers have been appropriately adjusted for the Town to the 2017 employment value found in the Town of Collingwood's Development Charges Background Study. The 2017 employment is 12,038 persons, amounting to an increase of 1,019 jobs from the 2011 value;
- > The employment land budget template has been utilized to assess an alternative employment land supply scenario to 2031. The current employment forecast of 13,500 jobs, as outlined in Schedule 7 of the Growth Plan, may not be sufficient to meet population growth in the Town of Collingwood;
- > The Land Needs Assessment Methodology for the Greater Golden Horseshoe published by the Ministry of Municipal Affairs and Housing notes that overall, in the GTHA, there is one population serving job for every 5.4 residents. In Simcoe County (excluding Barrie and Orillia) the rate is 1 job per 6.5 residents. The rate for Collingwood as of 2016 – is much lower at 2.7 – meaning that there is a significantly above average number of population-serving jobs per resident owing to Collingwood's function as a tourist and recreation centre.



However, even if all of the employment anticipated by the Growth Plan was population serving, this would result in a ratio of 1 job per 7.5 residents, which is unsustainable, and well below the desired ratio of 1 job per 5 residents;

- > As such, a second scenario has been tested – referred to as “Scenario B” - based on an increased activity rate of 30% for the growth between 2017 and 2031. This results in 15,068 total jobs in 2031 or a growth of 3,030 jobs. Assuming that population serving jobs comprise 71% of total jobs (with 8% being rural based and 21% being employment land jobs), this would result in a more sustainable rate of 1 population serving job per 5.1 residents; and,
- > The employment land budget template has been utilized to forecast employment land supply in 2041. In doing so, the adjusted 2017 employment value of 12,038 has been used and applied a 2041 employment value of 17,498, as discussed previously.

### 2031 Employment Land Need

Two potential employment land budget scenarios have been tested for the 2031 analysis. The purpose of these scenarios is to investigate how estimated employment growth will impact future employment land supply, and to provide the Town of Collingwood with a high-level understanding of how to plan for a potential surplus/deficit of land supply in 2031.

The two scenarios are detailed below:

- > **Scenario A:** maintains all assumptions that were originally applied in the existing employment land budget, with the exception of the 2011 employment value, which was updated to 2017; and,
- > **Scenario B:** adjusted the employment value for 2031 to 15,068, based on a 30% activity rate. This amounts to a total of 3,030 jobs within the forecast period.

### Supply Analysis

As shown in Figure 5-14, an employment land supply inventory was conducted in 2017 to understand the total supply of employment lands in Collingwood. Once adjusted for underutilized and vacant space, as well as the application of a gross to net adjustment of 86%, the net vacant developable supply was reported at 113.5 hectares. The supply analysis has remained consistent for both scenarios.

The majority of Collingwood’s employment land supply is located in the industrial park located in the southeast portion of the Town – bound by Highway 26, Raglan Road, and Poplar Sideroad. While prominent industrial users are located in this area – namely Pilkington Glass of Canada, AG Global Canada, Canadian Mist Distillers, and VOA Canada – many of the parcels are occupied by non-traditional employment area uses including rental services, fitness centres, breweries, car dealerships, and Georgian College.

		Hectares
Total Supply	Non- developable	0
	Occupied	141.8
	Underutilized gross vacant	23.6
	Gross vacant	108.8
	Total Supply	<b>274.2</b>
Gross Developable Supply	Under utilized and vacant	132.4
Net Vacant Developable Supply	Gross-to-Net adjustment	86%
	<b>Net Vacant Developable Supply</b>	<b>113.5</b>

**Figure 5-14: Employment Land Supply in Collingwood, 2017**

Note: Net employment land refers to lands that have been subdivided, and excludes roadways, green spaces, utilities, and other lands that cannot be occupied.

There are additional industrial uses concentrated along Stewart Road (High Street and Sixth Street), as well as the area surrounding Mountain Road and Tenth Line. Both of these industrial areas are home to many non-traditional employment land uses including breweries, fitness centres, and other retail/service commercial facilities.

When the commercial inventory and project field work was conducted in January 2020, the employment land areas were visited to confirm if any of the vacant parcels had been occupied since the 2017 study. Based on survey observations, all of the vacant parcels remain vacant today. As such, the existing supply assumptions from the original employment land budget have been utilized.

## Demand Analysis

Figure 5-15 details Collingwood's estimated growth in jobs between 2017 and 2031 for Scenario A and Scenario B. As shown, Scenario A results in growth of 1,462 jobs and Scenario B results in 3,030 jobs.

For both scenarios, over 70% of the new job growth is anticipated to be population-related employment opportunities – translating to 1,038 and 2,151 new jobs in Scenario A and B, respectively. This is consistent with past employment trends in Collingwood as the local economy is driven by the services-producing sectors including Accommodation and Food Services and Retail Trade, as well as the Town's robust tourism industry. In both scenarios, employment land employment accounts for 21% of total employment growth.

Figure 5-16 details the total number of jobs that would be accommodated on employment lands between 2017 and 2031. As shown, there will an estimated 398 new jobs located on employment lands in Scenario A, and 824 jobs in Scenario B.

An employment land average density rate of 20 jobs per hectare was applied in the original employment land budget. This density rate remains appropriate for the Town of Collingwood. As such, when the density rate is applied to both scenarios, it results in the demand for 20 hectares of employment land in Scenario A and 41 hectares in Scenario B.

			Scenario A	Scenario B
			Jobs	Jobs
Forecast total place of work		2017	12,038	12,038
Employment (based on % growth of County forecast)		2031 Forecast	13,500	15,068
		17-31 Growth	1,462	3,030
Forecast employment growth by type	Employment Type	Share %	Job Growth by Type	
	Population related	71%	1,038	2,151
	Rural based	8%	117	242
	Employment land	21%	307	636
	Total check	100%	1,462	3,030

Figure 5-15: Demand Designated Employment (2017-2031)

**Scenario A**

	Employment Growth by Type by Location			
Employment Type	Designated Employment Lands		Not on Industrial Employment Lands	
	Share (%)	# of Jobs	Share (%)	# of Jobs
Population Related Employment	10%	104	90%	934
Rural Based Employment	2%	2	98%	115
Employment Land Employment	95%	292	5%	15
	<b>Total</b>	<b>398</b>	<b>Total</b>	<b>1,064</b>

**Scenario B**

	Employment Growth by Type by Location			
Employment Type	Designated Employment Lands		Not on Industrial Employment Lands	
	Share (%)	# of Jobs	Share (%)	# of Jobs
Population Related Employment	10%	215	90%	1,936
Rural Based Employment	2%	5	98%	238
Employment Land Employment	95%	604	5%	32
	<b>Total</b>	<b>824</b>	<b>Total</b>	<b>2,206</b>

Figure 5-16: Number of Jobs Accommodated on Employment Lands, 2031

		<b>Scenario A</b>	<b>Scenario B</b>
<b>Supply</b>	Net Vacant Developable Supply	113.5	113.5
	Adjustment for long-term vacancy and undeutilization	0.85	0.85
	Long term development supply	96	96
<b>Demand</b>	Employment land need (ha)	20	41
<b>Result (Supply-Demand)</b>	<b>Sufficiency of supply: excess vs. shortage (ha)</b>	<b>77</b>	<b>55</b>

Figure 5-17: Employment Land Budget Results (2017-2031)

Figure 5-17 consolidates the results of the aforementioned analysis, which results in an excess of 77 and 55 hectares of employment land for Scenario A and Scenario B, respectively. This analysis indicates that in both a 'conservative' and 'high' employment growth scenario, the Town of Collingwood will maintain a healthy surplus of employment land in 2031.

### 2041 Employment Land Need, 2041

As part of this study, an employment growth scenario for the Town of Collingwood has been analyzed where employment is forecast to 17,498 jobs in 2041. This value was determined by utilising a 30% activity rate. Similar to the residential land budget scenarios, the results from this analysis may differ with future employment growth allocations after Simcoe County completes the MCR process.

		Hectares
Total Supply	Non- developable	0
	Occupied	141.8
	Underutilized gross vacant	23.6
	Gross vacant	108.8
	Total Supply	<b>274.2</b>
Gross Developable Supply	Under utilized and vacant	132.4
Net Vacant Developable Supply	Net-to-gross adjustment	86%
	<b>Net Vacant Developable Supply</b>	<b>113.5</b>

Figure 5-18: Employment Land Supply in Collingwood, 2041

### Supply Analysis

Figure 5-18 outlines the net vacant developable supply. As shown, the assumptions are consistent with the original employment land budget.

### Demand Analysis

Based on the employment growth forecast to 2041 and the 2017 employment figure outlined in the Development Charges Background Study, Figure 5-19 shows that Collingwood will add 5,460 jobs between 2017 and 2041. The same assumptions for each employment type have been applied, with the majority of jobs being population-related employment.

Figure 5-20 details the total number of jobs that would be accommodated on employment lands between 2017 and 2041. As shown, there will an estimated 1,486 new jobs located on employment lands, while the remaining 3,974 will be located on non-industrial lands. When the employment land average density rate of 20 jobs per hectare was applied to the 1,486 jobs, the resulting employment land need amounted to 74 hectares to 2041.

	Jobs	
	2017	12,038
	2041 Forecast	17,498
	<b>2017-2041 Growth</b>	<b>5,460</b>
Employment Type	Share (%)	Types
Population Related Employment	71%	3,877
Rural Based Employment	8%	437
Employment Land Employment	21%	1,147
Total Check	100%	<b>5,460</b>

Figure 5-19: Demand Designated Employment (2017-2041)

In summary, the 2041 employment growth scenario results in an excess of employment land to 2041. As shown in Figure 5-21, the analysis results in a surplus of 22 hectares of employment land.

It is also important to recognize that in recent years, employment land absorption in the Town has been very slow. The surpluses identified in above may be larger, if absorption is not accelerated either through increased market attraction or economic development initiatives.

	Employment Growth by Type by Location			
Employment Type	Designated Employment Lands		Not on Industrial Employment Lands	
	Share (%)	# of Jobs	Share (%)	# of Jobs
Population Related Employment	10%	388	90%	3,489
Rural Based Employment	2%	9	98%	428
Employment Land Employment	95%	1,089	5%	57
	Total	<b>1,486</b>	Total	<b>3,974</b>

Figure 5-20: Number of Jobs Accommodated on Employment Lands, 2041

Supply	Net Vacant Developable Supply	113.5
	Adjustment for long-term vacancy and undeutilization	0.85
	Long term development supply	96
Demand	Employment land need (ha)	74
Result (Supply-Demand)	<b>Sufficiency of supply: excess vs. shortage (ha)</b>	<b>22</b>

Figure 5-21: Employment Land Budget Results (2017-2041)

## 06 Commercial Development

### Trade Area Delineation

The Primary Trade Area is comprised of the Town of Collingwood. The Secondary Trade Area includes The Blue Mountains, the Township of Clearview, and Wasaga Beach. In addition to persons living in the Town of Collingwood and the Secondary Trade Area, additional expenditure potential would be available from substantial four-season inflow, including: tourists, seasonal residents, non-residents working in the Trade Area; and transient traffic.

The total market influence attributed to a commercial concentration typically extends over a wide area beyond any precise boundary that can be drawn. In many cases, the shopping environment, competition, anchor tenants, and the range of goods and services offered in a commercial development will affect the extent of this market influence. A specific trade area has been delineated from which the existing and future store will generate the majority of its sales support from. Generally consistent with the Retail Market Opportunity and Impact Analysis Study undertaken in 2006 by Clayton Research Associates Ltd., the trade area includes a primary trade area and a secondary trade area:

- > The Primary Trade Area (PTA) consists of the Town of Collingwood; and,
- > The Secondary Trade Area (STA) consists of the Town of The Blue Mountains, the Township of Clearview, and the Town of Wasaga Beach.

The delineation of the PTA and STA was based on a number of factors, including:

- > The existing market influence of competitive retail/service commercial facilities located near The Town of Collingwood;
- > Distance and travel times to the area from various locations in the municipality;
- > Local and regional access characteristics of the area; and,
- > The location of natural and man-made barriers which could restrict the movement of customers to and from the area.

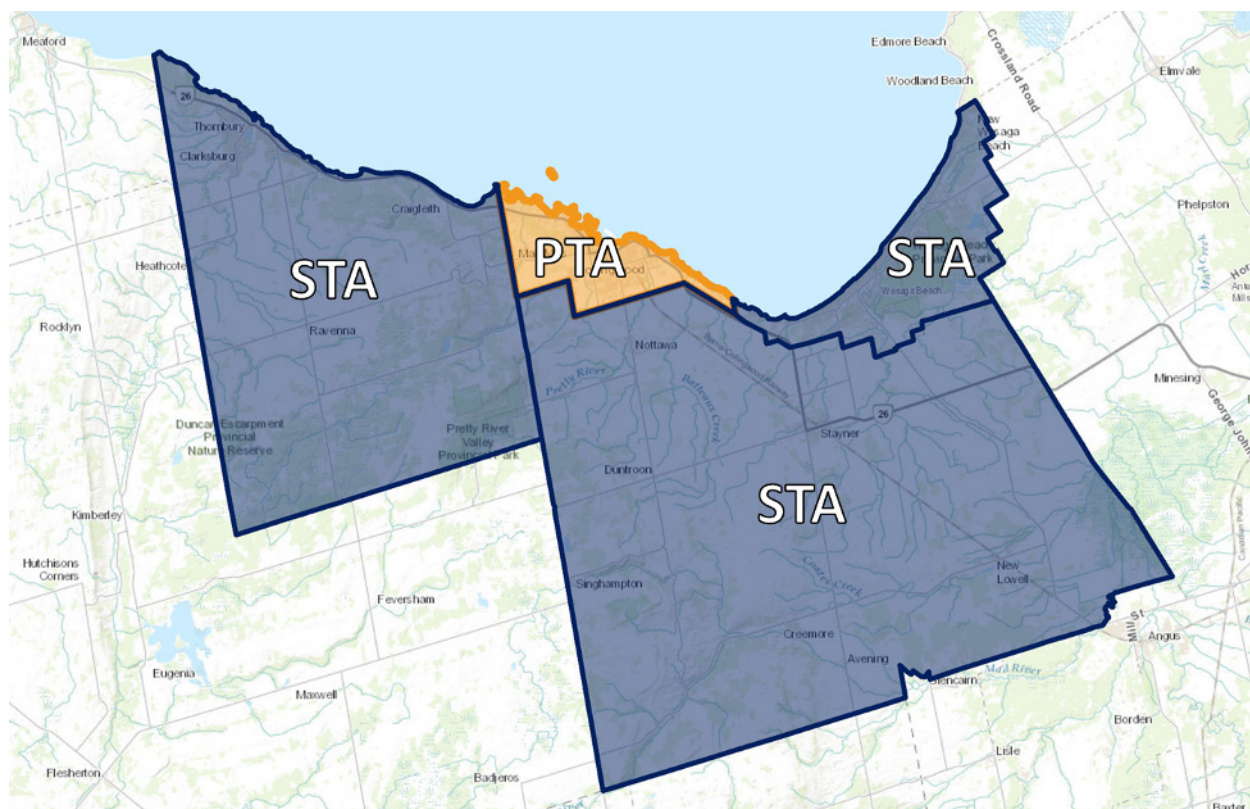


Figure 6-1: Trade Area



## Key Findings

### Trade Area

1. The Primary Trade Area is comprised of the Town of Collingwood, and the Secondary Trade Area includes The Blue Mountains, the Township of Clearview, and Wasaga Beach.
2. In addition to residents of the Town and the Secondary Trade Area, additional expenditure potential would be available from substantial four-season inflow, including: tourists, seasonal residents, non-residents working in the Trade Area; and transient traffic.

### Commercial Competition

1. The Town of Collingwood has a total of 2,111,000 square feet of retail/service commercial space, of which 10.8% is comprised of FSR facilities, 0.7% is comprised of BWL facilities, 43.0% is comprised of NFSR facilities, and 41.8% is comprised of services.
2. The retail/service commercial vacancy rate of the Study Area is 3.6%. This is below a healthy rate, and suggests that there may currently be some unfulfilled demand .
3. Collingwood functions as the regional commercial centre for northwest Simcoe County and Grey County. There are limited nearby retail goods and services to serve the Collingwood population outside of the Town. However, Collingwood competes with the Town of Blue Mountains and Wasaga Beach for tourist and seasonal resident spending.
4. There are five development applications proposed in Collingwood that collectively amount to 49,600 square feet (4,610 square metres) of gross floor area (GFA). All of the proposed retail/service commercial projects are intensification projects that are situated along the mixed-use intensification corridors located within the built-up area boundary.
5. There are some 85 acres (34 hectares) of vacant commercially designated lands in Collingwood. More than 50% of these lands are located in the Mixed-Use Intensification Area, which includes Node 1 – Downtown Core, Node 2 – First Street Corridor, and Node 3 – Western Regional Commercial.

### Commercial Needs Analysis

6. There will be a need for approximately 620,750 square feet (57,669 square metres) of new retail/service commercial space in Collingwood by 2031, and 1,161,160 square feet (107,875 square metres) by 2041.
7. There is some 49,600 square feet (4,610 square metres) of retail/service commercial space proposed to be developed. Excluding this space, there will be a net requirement for approximately 1,111,560 square feet (103,267 square metres) of retail/service commercial space by 2041.
8. Overall, there are 85 acres (34 hectares) of commercially designated vacant lands in Collingwood. Once a 25% land coverage assumption is applied and the 49,600 square feet (4,610 square metres) of active development applications has been accounted for, we estimate the vacant land can accommodate 973,617 square feet (90,452 square metres) of new retail/service commercial space.
9. We anticipate the Town of Collingwood will not have a sufficient supply of vacant commercially designated land to meet demand by 2041. Based on a 52,000 square foot annual absorption rate, we estimate the vacant land supply will be exhausted by 2038.
10. In our opinion, this eventual shortfall can be eliminated through more efficient land use strategies, such as shared/reduced parking requirements, mixed-used projects and more walkable formats within the Town's corridors and nodes. In addition, it is likely that small scale local serving commercial nodes can be developed as part of new subdivisions in the Designated Greenfield Areas to support future residential communities.
11. In our opinion, there is no need to designate additional commercial lands to 2041, other than to support existing and future local areas where is a demonstrated need for additional commercial space or to meet planning objectives, such as increased walkability or reduced travel times.

The Town of Collingwood functions as a regional commercial centre for surrounding municipalities in northwest Simcoe County and eastern Grey County. Commercial facilities in Collingwood face their most direct competition from retail uses in Wasaga Beach, however these uses lack the range and diversity of retail offerings that can be found in Collingwood. Apart from Wasaga Beach, the majority of existing commercial facilities located in the STA are primarily local population-serving and/or designed to serve the substantial seasonal and tourist population. Based on a review of development applications in each municipality located in the STA, there are no significant commercial developments proposed that would compete with Collingwood's commercial facilities.

Although commercial facilities located in Collingwood are expected to derive a significant portion of its sales volume from the expenditures made by the PTA and STA residents, it is important to note that additional market support will ultimately result from expenditures made by non-Trade Area residents as well (e.g., local employees, seasonal residents, tourists, and other visitors). These expenditures represent "inflow" sales, which will be appropriately recognized in the detailed retail market analysis that follows as part of the comprehensive market demand study included in this Discussion Paper.

## Commercial Competition

An analysis of existing competitive retail/service commercial facilities is essential to understanding the roles and functions that existing stores and services in Collingwood currently fulfill for local residents and visitors, as well as the potential competitive influences which could affect the market opportunity available for additional retail/service commercial space. The following discussion provides a general overview of the existing and planned commercial space in Collingwood.

An inventory of retail/service commercial space was conducted in January 2020. The inventory included all food store retail (FSR), non-food store retail (NFSR), and service commercial facilities. Based on the North American Industrial Classification System (NAICS), FSR and NFSR store types include the following:

### > FSR (Food Store Retail):

- + Supermarkets and Grocery Stores;
- + Convenience and Specialty Food Stores – including meat markets, fish and seafood markets, fruit and vegetable markets, baked goods, confectionary and nut stores;

### > Beverage Stores:

- + Wine, beer and liquor stores;

### > NFSR (Non-Food Store Retail):

- + Department stores;
- + Building and Outdoor Home Supply Stores – includes home improvement centres, hardware stores, paint and wallpaper stores, nursery/garden centres, and a wide range of building material and supply stores;
- + Pharmacies and Personal Care Stores – includes drug stores, optical stores, health equipment stores, nutrition and cosmetic stores;
- + General Merchandise Stores – includes department stores (i.e. The Bay or Walmart), Canadian Tire, Costco, dollar stores and variety stores;
- + Clothing and Accessories Stores – including jewellery and luggage/leather goods stores;
- + Furniture, Home Furnishings and Electronics Stores – including appliances, computer, camera and photographic supply stores; and,
- + Miscellaneous Store Retailers – including other durable/semi-durable stores such as sporting goods, toy, hobby, book, florist, office supply, fabric/wool, gift stores, pet and pet supply, used merchandise stores and tobacco stores.

The inventory fieldwork also included all commercial service establishments located in Collingwood. Based on the inventory fieldwork, publicly available information, and discussions with the planning staff from the Town of Collingwood, planned and/or proposed commercial developments in Collingwood have been identified and have been recognized as part of the future supply.

## Commercial Inventory

As described in the following paragraphs, the existing retail/service commercial facilities in the Town of Collingwood consist of a broad range of commercial activities, including strip retail, power centres, enclosed shopping centres, and other locations.

The inventory distinguished between various nodes of retail activity within Collingwood are generally consistent with the retail nodes identified in the Retail Market Opportunity and Impact Analysis completed by Clayton Research Associates Ltd. in 2006. In total, six separate commercial nodes were identified within Collingwood, as indicated in Figure 6-2.

> **Node 1 – Downtown Core:** includes Collingwood’s historic downtown core and The Shipyards. This node is consistent with the “Downtown Commercial Core” boundaries as defined in the Official Plan Schedule A – Land Use Plan, which generally includes retail/service commercial facilities located along Hurontario Street, Pine Street, and Ste. Marie Street between First Street and Hume Street. This area can be characterized by a mix of commercial and residential uses, including a number of offices, restaurants, boutique retail, entertainment, and services;

> **Node 2 – First Street Corridor:** includes the majority of retail/service commercial space located along both sides of First Street between Maple Street and Balsam Street/High Street. The node is primarily designated for Mixed Use Commercial and features a large number of strip retail plazas, standalone retail pads, and major restaurant chains. This corridor is a primary route for individuals travelling out of Collingwood and into Blue Mountains and the surrounding region;

> **Node 3 – Western Regional Commercial:** includes the only Regional Commercial District in Collingwood which is situated at the corner of Balsam Street/High Street and First Street Extension. This node includes the Collingwood Centre, Blue Mountain Centre, as well as large format retailers including Walmart Supercentre, The Home Depot, and Metro. This node also includes the two retail plazas: Cranberry Mews and Harbour Centre, both of which are designated as Highway Commercial and are situated along Highway 26;



Figure 6-2: Retail Nodes in Collingwood

- > **Node 4 – Hume Street Corridor:** includes the retail/service commercial facilities located along Hume Street, between Ste. Marie Street and Raglan Street. This node includes a wide range of standalone retail pads, strip plazas, and converted residential dwellings, and is designated as both Highway Commercial and Mixed-Use Commercial. This corridor is an important route for individuals travelling into Collingwood as it provides the connection between Highway 26 and downtown Collingwood;
- > **Node 5 – Southeast Highway Commercial:** includes retail/service commercial space located in Industrial Parks and Fringe Industrial areas situated north and south of Highway 26, as well as Highway Commercial facilities along Highway 26 and the Restrictive Commercial facilities on Beachwood Road. The majority of these retail/service commercial facilities have occurred organically over time, or have commercial functions that are suitable for industrial large-format buildings, like athletic clubs or specialized building supply companies; and,
- > **Node 6 – Remainder of Town:** includes retail/service commercial facilities scattered throughout the remainder of Collingwood, which have not already been accounted for as part of the other nodes. Included as part of this node are Home Hardware, design centres, reuse centres, and the small cluster of retail facilities located at the intersection of Hurontario Street and Poplar Sideroad.

### Existing Commercial Space

Based on the results of the fieldwork, Figure 6-3 provides a detailed summary of the total amount of Food Store Retail (FSR), Non-Food Store Retail (NFSR), and Services space currently located in Collingwood by specific category.

Collingwood currently contains approximately 196,120 square metres (2,111,000 square feet) of retail/service commercial space, of which 10.8% is comprised of FSR facilities, 0.7% is comprised of BWL facilities, 43.0% is comprised of NFSR facilities, and 41.8% is comprised of services.

The current retail/service commercial vacancy rate in Collingwood has been estimated at 3.6%, which is slightly below the range considered for a healthy commercial market (between 4% to 8%). Further, it is important to note that while conducting the fieldwork in January 2020, there were multiple retail units that were vacant as of that day, but had signs indicating the unit's future tenant and upcoming opening day. This may suggest that it may be difficult to accommodate new retailers wanting to enter the Collingwood market due to a lack of available and suitable units.

100 Pretty River Parkway, which accounts for a significant portion of vacant space, is a recently constructed, 2,555 square metres (27,500 square foot) retail plaza with large retail units - ranging from 85 to 140 square metres (3,000 to 5,000 square feet). Out of the total seven units, five were vacant at the time of the inventory, however signs on the building indicated that three of these units will have a tenant within the month.

This also rings true for multiple retail units located in the Downtown Core, which are experiencing frictional vacancy and indicated it will soon be occupied by a new tenant. As a result, the existing retail/service commercial vacancy rate is moderately overstated, recognizing that the retail/service commercial vacancy rate will fall further below a healthy rate when these units are occupied. This potentially indicates that residents may be under-served in terms of access to retail/service commercial uses, and that additional space could be supported in the local market area.

The Detailed Retail Inventory may be found in Appendix III.



Store Type	Downtown Core	First Street Corridor	Western Regional Commercial	Hume Street Corridor	Southeast Commercial	Remainder of Town	Total
<b>Food Store Retail</b>	<b>119,100</b>	<b>14,100</b>	<b>74,700</b>	<b>7,500</b>	<b>6,000</b>	<b>8,400</b>	<b>229,800</b>
Convenience and Specialty Foods	23,300	14,100	4,000	7,500	6,000	8,400	<b>63,300</b>
Supermarkets & Grocery	95,800		70,700				<b>166,500</b>
<b>Beer, Wine &amp; Liquor Stores</b>	<b>6,400</b>	<b>7,500</b>					<b>13,900</b>
Beverage Store	6,400	7,500					<b>13,900</b>
<b>Non-Food Store Retail</b>	<b>157,900</b>	<b>53,400</b>	<b>435,000</b>	<b>42,500</b>	<b>121,100</b>	<b>98,500</b>	<b>908,400</b>
Apparel and Accessories	43,500	2,700	37,400				<b>83,600</b>
Automotive	4,400				23,900	6,000	<b>34,300</b>
Building and Outdoor Home Supply	7,900	2,100	98,000	25,800	24,700	69,300	<b>227,800</b>
Furniture, Home Furnishings & Electronics Store	21,600	2,600	27,400	13,400	46,000		<b>111,000</b>
General Merchandise	18,100		208,300				<b>226,400</b>
Miscellaneous Retailers	40,700	25,900	60,400		26,500	23,200	<b>176,700</b>
Pharmacies & Personal Care	21,700	20,100	3,500	3,300			<b>48,600</b>
<b>Services</b>	<b>439,500</b>	<b>119,900</b>	<b>104,400</b>	<b>39,400</b>	<b>94,600</b>	<b>85,300</b>	<b>883,100</b>
Consumer Goods Rental			2,500	1,000		2,700	<b>6,200</b>
Cultural, Entertainment & Recreation	22,100		31,100		30,600	36,900	<b>120,700</b>
Finance	54,800	5,700		1,300			<b>61,800</b>
Food Service & Drinking Places	77,700	70,800	35,600	4,700	10,400	4,900	<b>204,100</b>
Health Care	98,200	5,500	6,000	19,700	8,500		<b>137,900</b>
Insurance and Real Estate	37,500	5,900	6,000		3,900		<b>53,300</b>
Personal & Households Goods Repair		10,200			10,900	6,500	<b>27,600</b>
<b>Personal Care</b>	<b>52,400</b>	<b>10,100</b>	<b>15,400</b>	<b>3,600</b>		<b>7,600</b>	<b>89,100</b>
Professional, Scientific & Technical Services	61,600	8,000	7,800	7,500	9,800	26,700	<b>121,400</b>
Selected Civic & Social Organizations	9,700				2,300		<b>12,000</b>
Selected Educational Services	12,600			1,600	18,200		<b>32,400</b>
Selected Office Administrative Services	6,500	1,200					<b>7,700</b>
Social Services	6,400	1,200					<b>7,600</b>
Transportation		1,300					<b>1,300</b>
<b>Vacant</b>	<b>31,400</b>	<b>4,700</b>	<b>2,700</b>	<b>8,500</b>	<b>24,600</b>	<b>3,900</b>	<b>75,800</b>
<b>Total</b>	<b>754,300</b>	<b>199,600</b>	<b>616,800</b>	<b>97,900</b>	<b>246,300</b>	<b>196,100</b>	<b>2,111,000</b>

Figure 6-3: Commercial Inventory by Store Type, Collingwood (January 2020)

## Secondary Trade Area

In addition to the retail/service commercial facilities in the PTA, some retail/service space can be found in the various towns and hamlets across the STA. These facilities consist of local, neighbourhood-serving businesses; including supermarkets, pharmacies and convenience stores. Additionally, a significant amount of retail/service commercial facilities in the STA are catered towards tourists and the seasonal population – specifically in the Town of Blue Mountain and Wasaga Beach. There is limited nearby competition for Collingwood in terms of goods and services to serve the permanent population. However, the resorts and commercial outlets in the Town of Blue Mountains and Wasaga Beach compete with Collingwood for a share of tourist and seasonal resident spending.

## Proposed Commercial Developments

Based on Town of Collingwood's Development Map (January 2020) and data available on the Town's planning and development webpage in April 2020, there are currently five development applications that include retail/service commercial space. These five development applications collectively include an approximate total of 4,610 square metres (49,600 square feet) of gross floor area (GFA). These applications range in size from 220 square metres (2,400 square feet) to 2,515 square metres (27,000 square feet).

**Figure 6-4: Commercial Development Applications, Town of Collingwood**

Note: Refer to figure 6-5 for further information related to each application



	Address	Description	Proposed Commercial Space (sq. m)	Proposed Commercial Space (sq. ft.)
1	2 Mountain Rd	Sleep Country standalone retail pad	465	5,000
2	175 First St	Retail plaza; six commercial units	1,078	11,600
3	75 Third St	Commercial units at base of residential building	219	2,400
4	84 Hurontario St	Two commercial units at base of The Regent Condominium	336	3,600
5	263 Hurontario St	Commercial units at base of Monaco Condominiums	2,513	27,000

**Figure 6-5: Summary of Proposed Commercial Development Applications, Town of Collingwood**



All of the proposed commercial space is situated along the mixed-use intensification corridors located within the built-up area boundary, which is consistent with the Town's intent on compact development. Additionally, the majority of new retail/service commercial space has been proposed as part of intensification projects – either as the commercial component of a mixed-use residential project or as a second building located on a site that has existing retail/service commercial facilities.

It is important to note that this total does not account for a 14 hectare (35 acre) regional commercial district that has been proposed within Node 3 – Western Regional Commercial. The applicant has recently received Draft Plan Approval for the project. No information has yet been received relating to proposed retail/service commercial space. This project has been included as part of the vacant commercial lands supply.

Each retail/service commercial development application in the Town of Collingwood has been summarized in Figure 6-4 and Figure 6-5.

## Vacant Commercial Land

To understand where future retail/service commercial space could be potentially located in the Town of Collingwood, the Town's vacant land data was reviewed. This dataset of vacant commercial land was collected, consolidated, and provided by the Town of Collingwood planning department.

As shown in Figure 6-6, there is a total of 34 hectares (85 acres) of vacant commercial lands located in Collingwood. More than 50% of these vacant lands are located in the Mixed-Use Intensification Area, which includes Node 1 – Downtown Core, Node 2 – First Street Corridor, and Node 3 – Western Regional Commercial. Most of the remaining vacant commercial parcels are located in the surrounding Delineated Built-Up Area, and only one vacant parcel is located in the Designated Greenfield Area.

Based on a 25% land coverage assumption, it is estimated that the total potential retail/service commercial space that could be accommodated on currently vacant lands amount to approximately 85,843 square metres (924,017 square feet). It is important to recognize that a 25% coverage area is common to traditional retail projects and reflects the need to accommodate ground related parking to serve retail and service outlets. Intensification could reduce the land area required for retail and service outlets, only to the extent that on-site parking requirements can be reduced or that underground parking can be made financially viable. Strategies to reduce parking in intensification development projects include: shared parking in mixed-use projects; augmenting on-site parking with street parking or off-site public parking; and greater facilitation of pedestrian shopping. For this reason, the commercial land area requirement should be considered a maximum.

	Gross Vacant Land (ha)	Gross Vacant Land (acres)	Potential Commercial Space (sq. ft.)
Mixed-use Intensification Area	19.01	47.00	511,612
Remaining Built-up Area	12.90	31.90	347,173
Designated Greenfield Area	2.42	6.00	65,231
<b>Total</b>	<b>34.33</b>	<b>84.85</b>	<b>924,017</b>

Figure 6-6: Potential Retail/Service Commercial Space

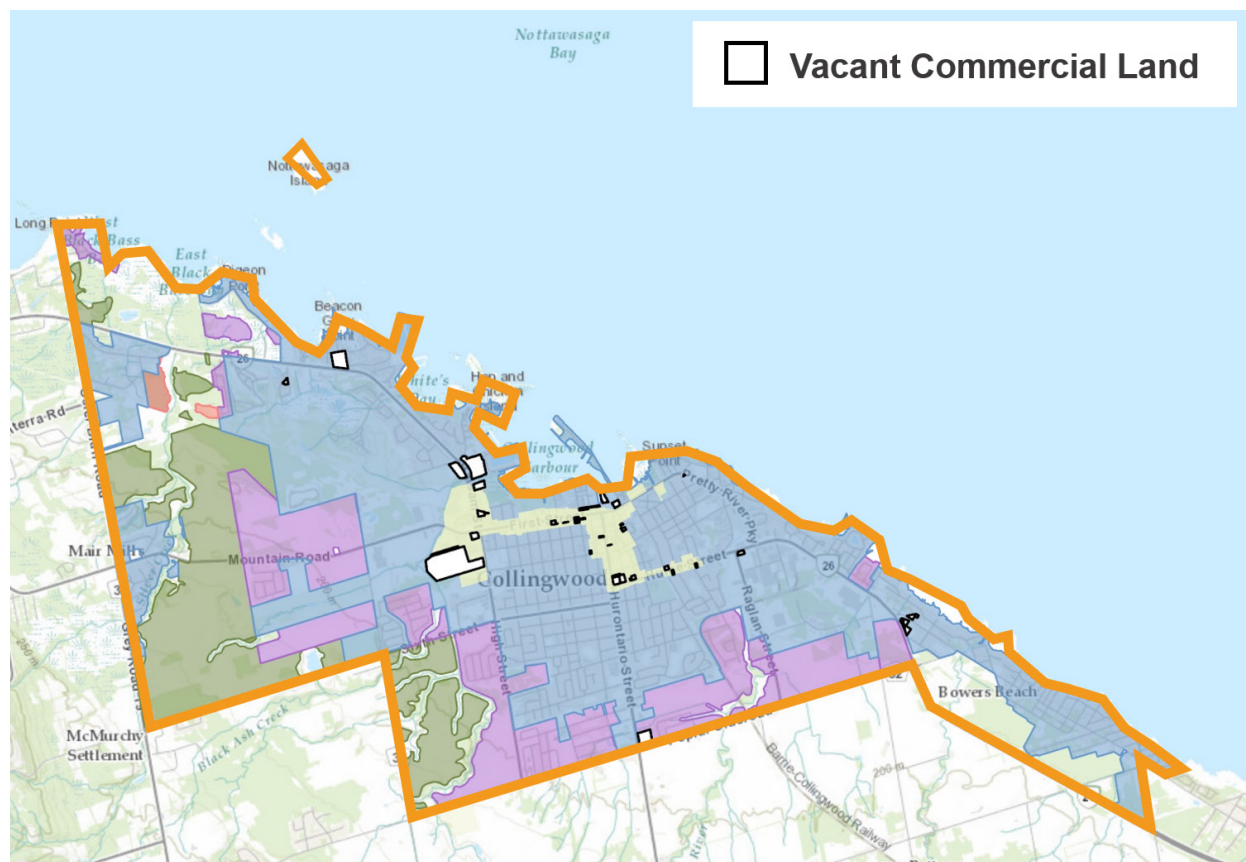


Figure 6-7: Existing Vacant Commercial Land in Study Area

## Needs Analysis - Per Capita Retail Space

Utilizing an approach commonly used to estimate the future retail/service commercial needs of a community, a high-level per capita space analysis has been carried out in order to assess the retail/service needs of existing and future residents in Collingwood to 2031 and 2041.

Recognizing the significance of Collingwood's seasonal population and combined impact of these residents and tourists on the local economy, two per capita analyses for each forecast period have been prepared. The first per capita analysis utilizes the growth in Collingwood's permanent population between 2019 and the forecast year, and the second per capita analysis has been applied to the projected growth of the Town's seasonal population. The data is provided in Figure 6-8 and Figure 6-11.

- > The total warranted space from both per capita analyses have been combined and inflated by an assumed tourism factor to determine Collingwood's total estimated commercial need. This has been summarized in **Column E**, which identifies the share (target capture share) of Collingwood residents expenditures estimated to be made within the PTA (i.e. the Town of Collingwood). These have been based on the analysis of the inventory and outside competition;
- > Based on Collingwood's extensive retail offerings, it has been assumed that all categories have significantly high capture share by local residents. The closest regional-serving commercial competition to Collingwood are Barrie and Owen Sound, both of which have similar retail offerings to Collingwood. Barrie, as a much larger urban centre has stores and services not available in Collingwood, such as Costco, The Bay, and other retail chains and specialty retail outlets that typically require a larger market area;
- > **Column F** is simply the target capture share multiplied by the total space required and indicates the space in Collingwood supported only by Collingwood residents (excluding inflow);

- > **Column G** provides an estimate of expenditure inflow for each category, and has been based on our evaluation of the stores within the inventory, the outside markets (i.e. STA, other Simcoe County) and competing retail facilities. These inflow numbers reflect inflow by permanent residents of the surrounding area, including persons working in Collingwood, but living outside of the Town. Expenditures by seasonal residents and tourists have been calculated separately; and,
- > **Column H** identifies the total retail space warranted by category after accounting for inflow. This represents the amount of space that would be required to support the projected new population in Collingwood.

The combined total of Figure 6-9 and Figure 6-10 amounts to 44,360 square metres (477,500 square feet). In addition to this space, a tourism factor of 30% has been assumed to account for Collingwood's four-season tourism industry. As shown in Figure 6-8, this increased the total amount of warranted space to 57,670 square metres (620,750 square feet). The 30% factor is based on an understanding of the current inventory and the nature of the future retail industry. It also assumes that future retail space demand will be lower than currently exists in the Town owing to technology trends.

Figure 6-9 and Figure 6-12 summarizes the calculation of warranted space by Collingwood residents to 2031 and 2041 respectively. Columns A and B of each per capita analysis indicate the current space by category and the space per person or space per capita in Collingwood. In total, there are some 7.8 square metres (84.4 square feet) of retail and services space per person in Collingwood. For Collingwood's permanent population, this value is double the amount typically seen in comparable communities, which is closer to approximately 3.7 square metres (40 square feet) per capita. The high amount of per capita space is largely attributed to the Collingwood's role as a regional commercial centre for northwest Simcoe County and Grey County, and the Town's role in serving a large seasonal population and tourism base.

## 2031 Per Capita Analysis

For this analysis, typical per capita space ratios have been used, based on a large number of commercial inventories carried out in similar sized Ontario markets. These ratios have been shown for each retail and service category and in total comprise just over 3.8 square metres (41 square feet) of space per person for the Town's permanent population, and 2.6 square metres (28 square feet) of space per person for the seasonal population.

- > **Columns C through H** of Figure 6-9 and Figure 6-10 provide the analysis of the space that would be required to support the future residents of Collingwood to 2031. These space estimates are based on a growth of 9,283 permanent residents and 2,647 seasonal residents between 2019 and 2031.
- > **Column C** identifies typical space per capita requirements for similar sized Ontario communities. The combined total of Figure 6-9 and Figure 6-10 illustrates that the space required to support growth would amount to 6.5 square metres (69.5 square feet) per capita, including the space required to support permanent residents and seasonal residents. This can be compared with the 7.8 square metres (84.4 square feet) per capita presently existing in Collingwood;
- > **Column D** identifies the total space that would be supported by residents based on typical space per capita requirements;
- > **Column E** identifies the share (target capture share) of Collingwood residents expenditures estimated to be made within the PTA (i.e. the Town of Collingwood). These have been based on an analysis of the inventory and outside competition. Based on Collingwood's extensive retail offerings, it is assumed that all categories have significantly high capture share by local residents. The closest regional-serving commercial competition to Collingwood are Barrie and Owen Sound, both of which have similar retail offerings to Collingwood. Barrie, as a much larger urban centre has stores and services not available in Collingwood, such as Costco, The Bay, and other retail chains and specialty retail outlets that typically require a larger market area;

- > **Column F** is simply the target capture share multiplied by the total space required and indicates the space in Collingwood supported only by Collingwood residents (excluding inflow);
- > **Column G** provides an estimate of expenditure inflow for each category, and has been based on our evaluation of the stores within the inventory, the outside markets (i.e. STA, other Simcoe County) and competing retail facilities. These inflow numbers reflect inflow by permanent residents of the surrounding area, including persons working in Collingwood, but living outside of the Town. Expenditures by seasonal residents and tourists have been calculated separately; and,
- > **Column H** identifies the total retail space warranted by category after accounting for inflow. This represents the amount of space that would be required to support the projected new population in Collingwood. The combined total of Figure 6-9 and Figure 6-10 amounts to 44,361 square metres (477,500 square feet). In addition to this space, a tourism factor of 30% has been assumed to account for Collingwood's four-season tourism industry. As shown in Figure 6-8, this increased the total amount of warranted space to 57,670 square metres (620,750 square feet). The 30% factor is based on an understanding of the current inventory and the nature of the future retail industry. It also assumes that future retail space demand will be lower than currently exists in the Town owing to technology trends.

	2031
Warranted Space by New Permanent Residents	399,500
Total Warranted Space by New Seasonal Residents	78,000
Total Space Warranted	477,500
Tourism Factor	30%
Total Space Warranted Incl. Tourism	<b>620,750</b>

**Figure 6-8: Total Collingwood Per Capita Commercial Needs Analysis (2031)**

Note: All values are reported in square feet

Commercial Needs - Retail Category	Warranted Space to Support Population Growth							Total Warranted Space Required by New Residents in Collingwood (Sq Ft)
	Existing Retail Space in Study Area (Sq Ft)	Existing Space Per Capita (Sq Ft)	Typical Space Per Capita (Sq Ft)	Space Required by New Residents (Sq Ft)	Study Area Target Capture	Local Space Required by New Residents (Sq Ft)	Inflow	
Collingwood Population (2019) <sup>1</sup>	24,117	A	B	C	D	E	F	G
Collingwood Population Growth (2019-2031)	9,283							
2031 Collingwood Population <sup>2</sup>	33,400							
<b>Food Store Retail (FSR)</b>								
Supermarket	166,500	6.9	3.5	32,491	90%	29,241	30%	41,800
Specialty Food	63,300	2.6	1.5	13,925	90%	12,532	25%	16,700
<b>SUB TOTAL</b>	<b>229,800</b>	<b>9.5</b>	<b>5.0</b>	<b>46,415</b>	<b>90%</b>	<b>41,774</b>	<b>29%</b>	<b>58,500</b>
<b>Beer/Wine/Liquor (BWL)</b>	13,900	0.6	0.4	3,713	75%	2,785	20%	3,500
<b>Non-Food Store Retail (NFSR)</b>								
Selected Automotive	34,300	1.4	2.5	23,208	80%	18,566	20%	23,200
Furniture, Home Furnishings & Electronics	111,000	4.6	3.0	27,849	65%	18,102	20%	22,600
Building & Outdoor Home Supplies	227,800	9.4	3.0	27,849	90%	25,064	35%	38,600
Pharmacy & Personal Care	48,600	2.0	1.5	13,925	90%	12,532	10%	13,900
Clothing & Accessories	83,600	3.5	2.0	18,566	65%	12,068	20%	15,100
General Merchandise	226,400	9.4	6.5	60,340	70%	42,238	25%	56,300
Miscellaneous Retail	176,700	7.3	2.0	18,566	75%	13,925	25%	18,600
<b>SUB TOTAL</b>	<b>908,400</b>	<b>37.7</b>	<b>20.5</b>	<b>190,302</b>	<b>75%</b>	<b>142,494</b>	<b>24%</b>	<b>188,300</b>
<b>SERVICES</b>								
Finance, Insurance & Real Estate	115,100	4.8	2.0	18,566	65%	12,068	25%	16,100
Business Services <sup>3</sup>	129,100	5.4	1.5	13,925	65%	9,051	20%	11,300
Health Care	137,900	5.7	1.5	13,925	80%	11,140	30%	15,900
Cultural, Entertainment & Recreation	120,700	5.0	2.0	18,566	60%	11,140	30%	15,900
Food Service & Drinking Places	204,100	8.5	3.5	32,491	80%	25,992	40%	43,300
Personal Care	89,100	3.7	2.0	18,566	90%	16,709	25%	22,300
Other <sup>4</sup>	87,100	3.6	3.0	27,849	70%	19,494	20%	24,400
<b>SUB TOTAL</b>	<b>883,100</b>	<b>36.6</b>	<b>15.5</b>	<b>143,887</b>	<b>73%</b>	<b>105,594</b>	<b>29%</b>	<b>149,200</b>
<b>TOTAL</b>	<b>2,035,200</b>	<b>84.4</b>	<b>41.4</b>	<b>384,316</b>	<b>76%</b>	<b>292,647</b>	<b>27%</b>	<b>399,500</b>

SOURCE: urbanMetrics inc.

NOTES: Based on retail/service commercial inventory conducted in January 2020 and urbanMetrics' professional experience across Southern Ontario.

<sup>1</sup> Town of Collingwood Development Charges Background Study (2019), adjusted for net undercoverage.<sup>2</sup> Schedule 7, The Growth Plan (includes net undercoverage)<sup>3</sup> Includes: Professional, Scientific & Technical Services; Selected Office Administration<sup>4</sup> Includes: Civic & Social Organizations; Selected Educational Services; Social Services; Personal & Household Goods Repair & Maintenance; Transportation; Consumer Goods Rental

Rounded to the nearest 100 square feet.

Figure 6-9: Collingwood Per Capita Commercial Needs Analysis (Permanent Population, 2031)



Commercial Needs - Retail Category	Warranted Space to Support Population Growth							Total Warranted Space Required by New Residents in Collingwood (Sq Ft)
	Existing Retail Space in Study Area (Sq Ft)	Existing Space Per Capita (Sq Ft)	Typical Space Per Capita (Sq Ft)	Space Required by New Residents (Sq Ft)	Study Area Target Capture	Local Space Required by New Residents (Sq Ft)	Inflow	
Collingwood Seasonal Population (2019) <sup>1</sup>	6,845	A	B	C	D	E	F	G
Collingwood Seasonal Population Growth (2019-2031)	2,647							H
2031 Collingwood Seasonal Population <sup>2</sup>	9,492							
<b>Food Store Retail (FSR)</b>								
Supermarket	166,500	6.9	1.5	3,971	90%	3,574	30%	5,100
Specialty Food	63,300	2.6	1.0	2,647	90%	2,382	25%	3,200
<b>SUB TOTAL</b>	<b>229,800</b>	<b>9.5</b>	<b>2.5</b>	<b>6,618</b>	<b>90%</b>	<b>5,956</b>	<b>29%</b>	<b>8,300</b>
<b>Beer/Wine/Liquor (BWL)</b>	13,900	0.6	0.3	794	75%	596	20%	700
<b>Non-Food Store Retail (NFSR)</b>								
Selected Automotive	34,300	1.4	0.8	2,118	80%	1,694	20%	2,100
Furniture, Home Furnishings & Electronics	111,000	4.6	2.5	6,618	65%	4,302	20%	5,400
Building & Outdoor Home Supplies	227,800	9.4	3.0	7,942	90%	7,147	35%	11,000
Pharmacy & Personal Care	48,600	2.0	1.0	2,647	90%	2,382	10%	2,600
Clothing & Accessories	83,600	3.5	1.8	4,765	65%	3,097	20%	3,900
General Merchandise	226,400	9.4	2.5	6,618	70%	4,633	25%	6,200
Miscellaneous Retail	176,700	7.3	2.5	6,618	75%	4,964	25%	6,600
<b>SUB TOTAL</b>	<b>908,400</b>	<b>37.7</b>	<b>14.1</b>	<b>37,326</b>	<b>75%</b>	<b>28,219</b>	<b>24%</b>	<b>37,800</b>
<b>SERVICES</b>								
Finance, Insurance & Real Estate	115,100	4.8	1.0	2,647	65%	1,721	25%	2,300
Business Services <sup>3</sup>	129,100	5.4	1.0	2,647	65%	1,721	20%	2,200
Health Care	137,900	5.7	0.8	2,118	80%	1,694	30%	2,400
Cultural, Entertainment & Recreation	120,700	5.0	2.0	5,294	60%	3,177	30%	4,500
Food Service & Drinking Places	204,100	8.5	3.0	7,942	80%	6,353	40%	10,600
Personal Care	89,100	3.7	1.8	4,765	90%	4,288	25%	5,700
Other <sup>4</sup>	87,100	3.6	1.5	3,971	70%	2,780	20%	3,500
<b>SUB TOTAL</b>	<b>883,100</b>	<b>36.6</b>	<b>11.1</b>	<b>29,384</b>	<b>73%</b>	<b>21,734</b>	<b>29%</b>	<b>31,200</b>
<b>TOTAL</b>	<b>2,035,200</b>	<b>84.4</b>	<b>28.0</b>	<b>74,122</b>	<b>76%</b>	<b>56,504</b>	<b>28%</b>	<b>78,000</b>

SOURCE: urbanMetrics inc.

NOTES: Based on retail/service commercial inventory conducted in January 2020 and urbanMetrics' professional experience across Southern Ontario.

<sup>1</sup> urbanMetrics inc.

<sup>2</sup> urbanMetrics inc.

<sup>3</sup> Includes: Professional, Scientific & Technical Services; Selected Office Administration

<sup>4</sup> Includes: Civic & Social Organizations; Selected Educational Services; Social Services; Personal & Household Goods Repair & Maintenance; Transportation; Consumer Goods Rental

Rounded to the nearest 100 square feet.

Figure 6-10: Collingwood Per Capita Commercial Needs Analysis (Seasonal Population, 2031)



### 2041 Per Capita Analysis

Consistent with the analysis conducted for 2031, two per capita space analyses have been completed in order to assess the retail/service commercial needs of existing and future residents to 2041. The population growth scenario of 41,500 persons in 2041 has been maintained, amounting to a growth of 17,383 persons between 2019 and 2041. Additionally, it is anticipated that the Town will add 4,930 seasonal residents during the same period.

Overall, there is 82,980 square metres (893,200 square feet) of warranted retail/service commercial space by 2041. Once this total is inflated by the 30% tourism factor, it is estimated that the total amount of warranted retail/service commercial space increases to 107,875 square metres (1,161,160 square feet).

	2041
Warranted Space by New Permanent Residents	748,000
Total Warranted Space by New Seasonal Residents	145,200
Total Space Warranted	893,200
Tourism Factor	30%
<b>Total Space Warranted Incl. Tourism</b>	<b>1,161,160</b>

**Figure 6-11: Total Collingwood Per Capita Commercial Needs Analysis (2041)**

Note: All values are reported in square feet

Commercial Needs - Retail Category	Warranted Space to Support Population Growth							Total Warranted Space Required by New Residents in Collingwood (Sq Ft)
	Existing Retail Space in Study Area (Sq Ft)	Existing Space Per Capita (Sq Ft)	Typical Space Per Capita (Sq Ft)	Space Required by New Residents (Sq Ft)	Study Area Target Capture	Local Space Required by New Residents (Sq Ft)	Inflow	
Collingwood Population (2019) <sup>1</sup>	24,117	A	C	D	E	F	G	H
Collingwood Population Growth (2019-2041)	17,383							
2041 Collingwood Population <sup>2</sup>	41,500							
<b>Food Store Retail (FSR)</b>								
Supermarket	166,500	6.9	3.5	60,841	90%	54,756	30%	78,200
Specialty Food	63,300	2.6	1.5	26,075	90%	23,467	25%	31,300
<b>SUB TOTAL</b>	<b>229,800</b>	<b>9.5</b>	<b>5.0</b>	<b>86,915</b>	<b>90%</b>	<b>78,224</b>	<b>29%</b>	<b>109,500</b>
<b>Beer/Wine/Liquor (BWL)</b>	13,900	0.6	0.4	6,953	75%	5,215	20%	6,500
<b>Non-Food Store Retail (NFSR)</b>								
Selected Automotive	34,300	1.4	2.5	43,458	80%	34,766	20%	43,500
Furniture, Home Furnishings & Electronics	111,000	4.6	3.0	52,149	65%	33,897	20%	42,400
Building & Outdoor Home Supplies	227,800	9.4	3.0	52,149	90%	46,934	35%	72,200
Pharmacy & Personal Care	48,600	2.0	1.5	26,075	90%	23,467	10%	26,100
Clothing & Accessories	83,600	3.5	2.0	34,766	65%	22,598	20%	28,200
General Merchandise	226,400	9.4	6.5	112,990	70%	79,093	25%	105,500
Miscellaneous Retail	176,700	7.3	2.0	34,766	75%	26,075	25%	34,800
<b>SUB TOTAL</b>	<b>908,400</b>	<b>37.7</b>	<b>20.5</b>	<b>356,352</b>	<b>75%</b>	<b>266,829</b>	<b>24%</b>	<b>352,700</b>
<b>SERVICES</b>								
Finance, Insurance & Real Estate	115,100	4.8	2.0	34,766	65%	22,598	25%	30,100
Business Services <sup>3</sup>	129,100	5.4	1.5	26,075	65%	16,948	20%	21,200
Health Care	137,900	5.7	1.5	26,075	80%	20,860	30%	29,800
Cultural, Entertainment & Recreation	120,700	5.0	2.0	34,766	60%	20,860	30%	29,800
Food Service & Drinking Places	204,100	8.5	3.5	60,841	80%	48,672	40%	81,100
Personal Care	89,100	3.7	2.0	34,766	90%	31,289	25%	41,700
Other <sup>4</sup>	87,100	3.6	3.0	52,149	70%	36,504	20%	45,600
<b>SUB TOTAL</b>	<b>883,100</b>	<b>36.6</b>	<b>15.5</b>	<b>269,437</b>	<b>73%</b>	<b>197,732</b>	<b>29%</b>	<b>279,300</b>
<b>TOTAL</b>	<b>2,035,200</b>	<b>84.4</b>	<b>41.4</b>	<b>719,656</b>	<b>76%</b>	<b>547,999</b>	<b>27%</b>	<b>748,000</b>

SOURCE: urbanMetrics inc.

NOTES: Based on retail/service commercial inventory conducted in January 2020 and urbanMetrics' professional experience across Southern Ontario.

<sup>1</sup> Town of Collingwood Development Charges Background Study (2019), adjusted for net undercoverage.

<sup>2</sup> urbanMetrics inc.

<sup>3</sup> Includes: Professional, Scientific & Technical Services; Selected Office Administration

<sup>4</sup> Includes: Civic & Social Organizations; Selected Educational Services; Social Services; Personal & Household Goods Repair & Maintenance; Transportation; Consumer Goods Rental

Rounded to the nearest 100 square feet.

Figure 6-12: Collingwood Per Capita Commercial Needs Analysis (Permanent Population, 2041)

Commercial Needs - Retail Category	Warranted Space to Support Population Growth							Total Warranted Space Required by New Residents in Collingwood (Sq Ft)
	Existing Retail Space in Study Area (Sq Ft)	Existing Space Per Capita (Sq Ft)	Typical Space Per Capita (Sq Ft)	Space Required by New Residents (Sq Ft)	Study Area Target Capture	Local Space Required by New Residents (Sq Ft)	Inflow	
Collingwood Seasonal Population (2019) <sup>1</sup>	6,845	A	B	C	D	E	F	G
Collingwood Seasonal Population Growth (2019-2041)	4,930							
2041 Collingwood Seasonal Population <sup>2</sup>	11,775							
<b>Food Store Retail (FSR)</b>								
Supermarket	166,500	6.9	1.5	7,395	90%	6,656	30%	9,500
Specialty Food	63,300	2.6	1.0	4,930	90%	4,437	25%	5,900
<b>SUB TOTAL</b>	<b>229,800</b>	<b>9.5</b>	<b>2.5</b>	<b>12,326</b>	<b>90%</b>	<b>11,093</b>	<b>29%</b>	<b>15,400</b>
<b>Beer/Wine/Liquor (BWL)</b>	13,900	0.6	0.3	1,479	75%	1,109	20%	1,400
<b>Non-Food Store Retail (NFSR)</b>								
Selected Automotive	34,300	1.4	0.8	3,944	80%	3,155	20%	3,900
Furniture, Home Furnishings & Electronics	111,000	4.6	2.5	12,326	65%	8,012	20%	10,000
Building & Outdoor Home Supplies	227,800	9.4	3.0	14,791	90%	13,312	35%	20,500
Pharmacy & Personal Care	48,600	2.0	1.0	4,930	90%	4,437	10%	4,900
Clothing & Accessories	83,600	3.5	1.8	8,874	65%	5,768	20%	7,200
General Merchandise	226,400	9.4	2.5	12,326	70%	8,628	25%	11,500
Miscellaneous Retail	176,700	7.3	2.5	12,326	75%	9,244	25%	12,300
<b>SUB TOTAL</b>	<b>908,400</b>	<b>37.7</b>	<b>14.1</b>	<b>69,516</b>	<b>75%</b>	<b>52,556</b>	<b>24%</b>	<b>70,300</b>
<b>SERVICES</b>								
Finance, Insurance & Real Estate	115,100	4.8	1.0	4,930	65%	3,205	25%	4,300
Business Services <sup>3</sup>	129,100	5.4	1.0	4,930	65%	3,205	20%	4,000
Health Care	137,900	5.7	0.8	3,944	80%	3,155	30%	4,500
Cultural, Entertainment & Recreation	120,700	5.0	2.0	9,860	60%	5,916	30%	8,500
Food Service & Drinking Places	204,100	8.5	3.0	14,791	80%	11,832	40%	19,700
Personal Care	89,100	3.7	1.8	8,874	90%	7,987	25%	10,600
Other <sup>4</sup>	87,100	3.6	1.5	7,395	70%	5,177	20%	6,500
<b>SUB TOTAL</b>	<b>883,100</b>	<b>36.6</b>	<b>11.1</b>	<b>54,725</b>	<b>73%</b>	<b>40,477</b>	<b>29%</b>	<b>58,100</b>
<b>TOTAL</b>	<b>2,035,200</b>	<b>84.4</b>	<b>28.0</b>	<b>138,046</b>	<b>76%</b>	<b>105,235</b>	<b>28%</b>	<b>145,200</b>

SOURCE: urbanMetrics inc.

NOTES: Based on retail/service commercial inventory conducted in January 2020 and urbanMetrics' professional experience across Southern Ontario.

<sup>1</sup> urbanMetrics inc.<sup>2</sup> urbanMetrics inc.<sup>3</sup> Includes: Professional, Scientific & Technical Services; Selected Office Administration<sup>4</sup> Includes: Civic & Social Organizations; Selected Educational Services; Social Services; Personal & Household Goods Repair & Maintenance; Transportation; Consumer Goods Rental

Rounded to the nearest 100 square feet.

Figure 6-13: Collingwood Per Capita Commercial Needs Analysis (Seasonal Population, 2041)

## **Demand**

As analyzed earlier in this section, there will be a total need for approximately 57,670 square metres (620,750 square feet) of new retail/service commercial space in Collingwood by 2031, and 107,875 square metres (1,161,160 square feet) by 2041.

As noted previously, there are five active development applications proposing 4,610 square metres (49,600 square feet) of new retail/service commercial space in Collingwood. This proposed space will fulfil a portion of the warranted demand. As such, there will be a need for an additional 103,267 square metres (1,111,560 square feet) of retail/service commercial space by 2041.

By 2041, there will likely be sufficient permanent and seasonal population to warrant a range of large-format retail categories including: up to approximately 8,175 square metre (88,000 square feet) of supermarket space; over 8,360 square metres (90,000 square feet) of building and outdoor home supply space; over 10,220 square metres (110,000 square feet) of general merchandise space, as well as a portion of the warranted 9,300 square metres (100,000 square feet) of food service and drinking space. The most likely location for the majority of this warranted space would be in Node 3 – Western Regional Commercial. It is important to note there is an active development application for a 14 hectare (35 acre) new regional commercial district located in Node 3. Once adjusted for the 25% land coverage assumption, the proposed regional commercial district could accommodate just over 35,410 square metres (380,000 square feet) of retail/service commercial space.

Additionally, by 2041, the combined populations warrant a notable amount of space in retail categories that require smaller footprints, including 3,440 square metres (37,000 square feet) of Speciality Food Stores, 3,250 square metres (35,000 square feet) of Clothing and Accessories, as well as many of the Services categories. These types of retail categories are appropriate for vacant commercial units located in Node 1 – Downtown Core, Node 2 – First Street Corridor, and Node 4 – Hume Street Corridor. Additionally, these types of retail uses can situate as a component of mixed-use intensification project, such as the Monaco condominium located at 263 Hurontario Street.

## **Vacant Commercial Land Supply**

Based on the vacant land analysis, it is estimated that there is a total of 34 hectares (85 acres) of commercially designated vacant lands located in Collingwood, which can accommodate 85,845 square metres (924,020 square feet) at a 25% land coverage rate. Combined with the 4,610 square metres (49,600 square feet) of active commercial development applications, the total vacant land supply can accommodate an estimated 90,450 square metres (973,620 square feet) of new retail/service commercial space.

## **Reconciliation**

With a need for 103,270 square metres (1,111,560 square feet), and a potential available supply of 90,450 square metres (973,620 square feet), it is understood that the Town of Collingwood will not have a sufficient supply of vacant commercially designated land to meet demand by 2041.

As shown in Figure 6-14, in order to achieve the total retail/service commercial space demand to 2041, an average annual absorption rate of 4,830 square metres (52,000 square feet) has been assumed. This analysis indicates that the supply of vacant lands will be exhausted by 2038.

To resolve this eventual shortfall, the Town of Collingwood can explore a number of opportunities. While a 25% land coverage assumption has been utilized in this analysis, there are opportunities for the Town to encourage more intensive retail development or direct growth to underutilized commercial parcels with space for additional infill development. The review of commercial development applications highlighted that developers are already looking at intensification along the existing commercial nodes and corridors, as many of the proposed projects are located on sites already occupied with existing commercial uses. Additionally, intensification can be accomplished by reducing parking minimums, which would allow for a higher land coverage rate.

There will also likely be a need for small scale local commercial sites in future subdivisions within the Designated Greenfield Areas that have not been identified yet. It is anticipated that the Designated Greenfield Area will add over 10,000 new residents between 2016 to 2041, additional

Year	Vacant Land Supply	Commercial Space Absorption	Surplus or Deficit
2019	973,617		
2020	973,617	52,000	921,617
2021	973,617	104,000	869,617
2022	973,617	156,000	817,617
2023	973,617	208,000	765,617
2024	973,617	260,000	713,617
2025	973,617	312,000	661,617
2026	973,617	364,000	609,617
2027	973,617	416,000	557,617
2028	973,617	468,000	505,617
2029	973,617	520,000	453,617
2030	973,617	572,000	401,617
2031	973,617	624,000	349,617
2032	973,617	676,000	297,617
2033	973,617	728,000	245,617
2034	973,617	780,000	193,617
2035	973,617	832,000	141,617
2036	973,617	884,000	89,617
2037	973,617	936,000	37,617
2038	973,617	988,000	-14,383
2039	973,617	1,040,000	-66,383
2040	973,617	1,092,000	-118,383
2041	973,617	1,144,000	-170,383

**Figure 6-14: Estimated Commercial Space Absorption (2019-2041)**

Note: All values are reported in square feet

neighbourhood-serving commercial space will be likely be required to support the new residential communities.

As such, there is no need to designate additional commercial lands to 2041, other than to support existing and future local areas where there is a demonstrated need for additional commercial space, or to meet planning objectives, such as increased walkability or reduced travel times.

### Commercial Employment

The projected space will accommodate a significant employment base for the Town, which should be considered with regards to meeting the Growth Plan Employment targets. At a typical retail employment density of 2.5 workers per 93 square metres (1,000 square feet) the 57,670 square metres (620,750 square feet) required by 2031, would support some 1,550 new employees, while the 107,875 square metres (1,161,160 square feet) required by 2041 would support a total of some 2,900 new employees.

## 07 Next Steps

Collectively, the issues explored through this Discussion Paper will serve as the basis for obtaining additional public and stakeholder feedback, and will act as a starting point for preparing a number of options and ultimately, recommendations for the planning framework to be included in the new Collingwood Official Plan.

The subsequent Options and Recommendations Report will explore options for underlying 'philosophies,' which will provide a foundation for how planning issues are to be approached in Collingwood, as well as options for addressing a number of other 'special issues' that have come up in this process to-date.



# Appendix I: Residential Land Budget

Table 1					2016-2031 Change	2041 Scenario (10% of growth)	2016-2041 Change
A. Population Components	Total Population		22,470	33,400		41,500	
	Census Net Undercoverage	Rate	3.0%	3.0%		3.0%	
		Number	677	1,006		1,250	
	Census Population		21,793	32,394		40,250	
	Household Population		21,084	31,340		38,940	
	Non-Household Population	Number	709	1,054		1,309	
B. Households		Rate	3.3%	3.3%		3.3%	
		PPU	2.21	2.14		2.14	
C. Demand for Seasonal and Recreational Units		Total Occupied Households	9,556	14,669		18,196	
		Total Units	11,617	17,833		22,121	
		Seasonal and Vacant Units	2,061	3,164		3,925	
		Share of Seasonal and Vacant	17.7%	17.7%		17.7%	
D. Total Unit Demand	Total Unit Demand	Total Occupied Units	9,556	14,669	5,113	18,196	8,640
		Seasonal and Vacant Units	2,061	3,164	1,103	3,925	1,864
		Total Units	11,617	17,833	6,216	22,121	10,504

			2031		2041 Scenario A	2041 Scenario B
Table 2	A. Demand by Growth Plan Policy Area	Unit Growth	6,216		10,504	10,504
		Local Municipal Intensification Target	40%		40%	50%
		Unit Growth within delineated Built Boundaries and undelineated Built-Up Areas	2,486		4,202	5,252
		Share of Growth in Designated Greenfield Areas	60%		60%	50%
		Unit Growth in Designated Greenfield Areas (DGA)	3,729		6,302	5,252
		Share of Growth Outside Settlement Areas	0%		0%	0%
		Unit Growth Outside Settlement Areas	0		0	0
		Total All Growth Plan Policy Areas	6,216		10,504	10,504

			2031		2041 Scenario A	2041 Scenario B
Table 3	A. Demand	Unit Growth inside delineated built boundaries & undelineated built-up areas	2,486		4,202	5,252
	B. Supply inside delineated built boundaries & undelineated built-up areas	Units completed Census day 2016 to December 31, 2016	176		176	176
		Units completed January 1, 2017 to December 31, 2019	659		659	659
		Registered and Draft Approved units	1,781		1,781	1,781
		Complete Application Units	0		0	0
		Forecast of unit potential on vacant lands inside delineated built boundary	1,197		1,197	1,197
		Forecast of unit potential on vacant lands for urban uses inside undelineated built up areas	0		0	0
		Forecast of unit potential on vacant lands not for urban uses inside undelineated built up areas	0		0	0
		Total supply	3,813		3,813	3,813
	C. Sufficiency of Supply	Excess Supply (or shortfall supply)	1,327		-389	-1,439

			2031		2041 Scenario A	2041 Scenario B
Table 4	A. Demand	Unit Growth outside settlement areas	0		0	0
	B. Supply outside settlement areas	Units completed Census day 2016 to December 31, 2016	0		0	0
		Registered and Draft Approved units	0		0	0
		Complete Application Units	0		0	0
		Forecast of unit potential on vacant lands inside delineated built boundary	0		0	0
		Total supply	0		0	0
	C. Sufficiency of Supply	Excess Supply at 2031 (or shortfall at 2031)	0		0	0

### 2031

Table 5	Demand	<b>Total unit growth 2016-2031 in the Designated Greenfield Areas (DGA)</b>				<b>3,729</b>
		Assumed housing mix by type	Single/ Semi	Row	Apt.	<b>Total</b>
		Housing growth by type	55.0%	20.0%	25.0%	<b>100%</b>
	Supply in Designated Greenfield	Units completed Census day 2016 to December 31, 2016 <sup>1</sup>	82	55	0	137
		Units completed January 1, 2017 to December 31, 2019 <sup>2</sup>	249	228	0	477
		Registered and Draft Approved <sup>3</sup>	1,437	2,019	641	4,097
		Complete Applications	-	-	-	0
		Forecast of unit potential on vacant DGA lands for urban uses <sup>4</sup>	901	132	64	1,097
		Forecast of unit potential on vacant DGA lands not for urban uses	0	0	0	0
		<b>DGA Supply excluding lands not for urban uses</b>	<b>2,669</b>	<b>2,434</b>	<b>705</b>	<b>5,808</b>
		DGA Supply including lands not for urban uses	2,669	2,434	705	5,808
	Sufficiency of Supply	Excess/Shortfall of supply at 2031	618	1,688	-227	2,079
		Excess/Shortfall of Supply at 2031 on all DGA lands	618	1,688	-227	

### 2041: SCENARIO A

Table 5	Demand	<b>Total unit growth 2016-2041 in the Designated Greenfield Areas (DGA)</b>				<b>6,302</b>
		Assumed housing mix by type	Single/ Semi	Row	Apt.	<b>Total</b>
		Housing growth by type	45.0%	30.0%	25.0%	<b>100%</b>
	Supply in Designated Greenfield	Units completed Census day 2016 to December 31, 2016 <sup>1</sup>	82	55	0	137
		Units completed January 1, 2017 to December 31, 2019 <sup>2</sup>	249	228	0	477
		Registered and Draft Approved <sup>3</sup>	1,437	2,019	641	4,097
		Complete Applications	-	-	-	-
		Forecast of unit potential on vacant DGA lands for urban uses <sup>4</sup>	901	132	64	1,097
		Forecast of unit potential on vacant DGA lands not for urban uses	0	0	0	0
		<b>DGA Supply excluding lands not for urban uses</b>	<b>2,669</b>	<b>2,434</b>	<b>705</b>	<b>5,808</b>
		DGA Supply including lands not for urban uses	2,669	2,434	705	5,808
	Sufficiency of Supply	Excess/Shortfall of supply at 2041	-167	543	-871	-494
		Excess/Shortfall of Supply at 2041 on all DGA lands	-167	543	-871	

### 2041: SCENARIO B

Table 5	Demand	<b>Total unit growth 2016-2041 in the Designated Greenfield Areas (DGA)</b>				<b>5,252</b>
		Assumed housing mix by type	Single/ Semi	Row	Apt.	<b>Total</b>
		Housing growth by type	45.0%	30.0%	25.0%	<b>100%</b>
	Supply in Designated Greenfield	Units completed Census day 2016 to December 31, 2016 <sup>1</sup>	82	55	0	137
		Units completed January 1, 2017 to December 31, 2019 <sup>2</sup>	249	228	0	477
		Registered and Draft Approved <sup>3</sup>	1,437	2,019	641	4,097
		Complete Applications	-	-	-	-
		Forecast of unit potential on vacant DGA lands for urban uses <sup>4</sup>	901	132	64	1,097
		Forecast of unit potential on vacant DGA lands not for urban uses	0	0	0	0
		<b>DGA Supply excluding lands not for urban uses</b>	<b>2,669</b>	<b>2,434</b>	<b>705</b>	<b>5,808</b>
		DGA Supply including lands not for urban uses	2,669	2,434	705	5,808
	Sufficiency of Supply	Excess/Shortfall of supply at 2041	306	858	-608	556
		Excess/Shortfall of Supply at 2041 on all DGA lands	306	858	-608	

SOURCE: urbanMetrics inc.

1 County of Simcoe 2016 Residential Land Budget for the Town of Collingwood

2 CMHC Starts and Completions Survey – Historical Completions by Dwelling Type

3 Development Activity Map – January 2020, provided by the Town of Collingwood Planning Division

4 Town of Collingwood Medium and Long Term Development Horizon (Occupied in 2031 & 2041)

Table 6	Total amount of land redesignated from Lands Not for Urban Uses to Land for Urban Uses				
	Total additional population approved				
	Total number of units approved on lands redesignated from lands not for urban uses to lands for urban uses				
	0 hectares				
	Single/Semi	Row	Apt.	Total	
	0	0	0	0	

2031

Table 7	A. Demand by Growth Plan Policy Area		2016-2031 Units	PPU	2016-2031 Population
		Growth inside Delineated Built Up Areas	2,486	2.11	5,246
		Growth outside the Settlement Areas	0	0.00	0
		Growth in the Designated Greenfield Areas	3,729	2.39	8,913
	B. Supply by Growth Plan Policy Area	Total Supply inside Delineated Built Up Areas	3,813	2.11	8,045
		Total Supply outside the Settlement Areas	0	0	0
		Total supply in all Designated Greenfield Areas	5,808	2.39	13,881
	C. Surplus (or deficit) by Growth Plan Policy Area	Delineated Built Up Areas	1,327		2,799
		Outside Settlement Areas	0		0
		Designated Greenfield Areas	2,079		4,968
	C. Sufficiency of Supply	Total Demand	6,216		14,159
		Total Supply	9,621		21,927
	Surplus or (Deficit)	3,405			7,767

			2041 SCENARIO A			2041 SCENARIO B		
Table 7	A. Demand by Growth Plan Policy Area		2016-2041 Units	PPU <sup>1</sup>	2016-2041 Population	2016-2041 Units	PPU <sup>1</sup>	2016-2041 Population
		Growth inside Delineated Built Up Areas	4,202	2.00	8,403	5,252	2.00	10,504
		Growth outside the Settlement Areas	0	0	0	0	0	0
		Growth in the Designated Greenfield Areas	6,302	2.22	13,991	5,252	2.22	11,659
	B. Supply by Growth Plan Policy Area	Total Supply inside Delineated Built Up Areas	3,813	2.00	7,626	3,813	2.00	7,626
		Total Supply outside the Settlement Areas	0	0	0	0	0	0
		Total supply in all Designated Greenfield Areas	5,808	2.22	12,894	5,808	2.22	12,894
	C. Surplus (or deficit) by Growth Plan Policy Area	Delineated Built Up Areas	-389		-777	-1,439		-2,878
		Outside Settlement Areas	0		0	0		0
		Designated Greenfield Areas	-494		-1,097	556		1,234
	C. Sufficiency of Supply	Total Demand	10,504		22,394	10,504		22,163
		Total Supply	9,621		20,520	9,621		20,520
	Surplus or (Deficit)	-883		-1,874	-883		-1,643	

# Appendix II: Employment Land Budget

2031

Supply			Hectares
	Total Supply	Non-developable (env)	0
		Occupied	141.8
		Underutilized Gross Vacant	23.6
		Gross Vacant	108.8
		<b>Total Supply</b>	<b>274.2</b>
	Gross Developable Supply	Under Utilized and Vacant	132.4
	Net Vacant Developable Supply	Net-to-Gross Adjustment	86%
		<b>Net Vacant Developable Supply</b>	<b>113.5</b>

Demand - Designated Employment Land	Forecast Total Place of Work Employment (Based on % Growth of County Forecast)			SCENARIO A	SCENARIO B
				Jobs	Jobs
			2017	12,038	12,038
			2031 Forecast	13,500	15,068
			<b>17-31 Growth</b>	<b>1,462</b>	<b>3,030</b>
	Forecast Employment Growth by Type	Employment Type	Share (%)	Job Growth by Type	
		Population-Related	71%	1,038	2,151
		Rural-based	8%	117	242
		Employment Land	21%	307	636
		<b>Total Check</b>	100%	<b>1,462</b>	<b>3,030</b>

Demand	Number of Jobs to be Accommodated on Employment Lands	SCENARIO A		Employment Growth by Type by Location		
		Employment Type	Designated Employment Lands	Not on "Industrial" Employment Lands		Total Check
			Share (%)	Number of Jobs	Share (%)	Number of Jobs
		Population-Related Employment	10%	104	90%	934
		Rural-based Employment	2%	2	98%	115
		Employment Land Employment	95%	292	5%	15
		<b>TOTAL</b>		<b>398</b>	<b>TOTAL</b>	<b>1,064</b>

Demand	Number of Jobs to be Accommodated on Employment Lands	SCENARIO B		Employment Growth by Type by Location		
		Employment Type	Designated Employment Lands	Not on "Industrial" Employment Lands		Total Check
			Share (%)	Number of Jobs	Share (%)	Number of Jobs
		Population-Related Employment	10%	215	90%	1,936
		Rural-based Employment	2%	5	98%	238
		Employment Land Employment	95%	604	5%	32
		<b>TOTAL</b>		<b>824</b>	<b>TOTAL</b>	<b>2,206</b>

Demand	Employment Land Demand		SCENARIO A	SCENARIO B
		Number of Jobs on Employment Lands	398	824
		Estimated Average Density (jobs / net ha)	20	20
		<b>Employment Land Need (ha)</b>	<b>20</b>	<b>41</b>

Employment Land Budget Results	Supply		SCENARIO A	SCENARIO B
		Net Vacant Developable Supply	113.5	113.5
		Adjustment for long-term vacancy and underutilization	0.85	0.85
	Demand	Long-term Development Supply	96	96
		Employment Land Need (ha)	20	41
		<b>Result (Supply - Demand) Sufficiency of Supply: Excess vs (shortage) ha</b>	<b>77</b>	<b>55</b>

2041

Supply			Hectares
	Total Supply	Non-developable (env)	0
		Occupied	141.8
		Underutilized Gross Vacant	23.6
		Gross Vacant	108.8
		<b>Total Supply</b>	<b>274.2</b>
	Gross Developable Supply	Under Utilized and Vacant	132.4
	Net Vacant Developable Supply	Net-to-Gross Adjustment	86%
		<b>Net Vacant Developable Supply</b>	<b>113.5</b>

Demand - Designated Employment Land	Forecast Total Place of Work Employment (Based on % Growth of County Forecast)			Jobs
			2017	12,038
			2041 Forecast	17,498
			<b>17-41 Growth</b>	<b>5,460</b>
	Forecast Employment Growth by Type	Employment Type	Share (%)	Type
		Population-Related	71%	3,877
		Rural-based	8%	437
		Employment Land	21%	1,147
		<b>Total Check</b>	100%	<b>5,460</b>

Demand	Number of Jobs to be Accommodated on Employment Lands	Employment Growth by Type by Location				Total Check	
		Employment Type	Designated Employment Lands		Not on "Industrial" Employment Lands		
			Share (%)	Number of Jobs	Share (%)		Number of Jobs
		Population-Related Employment	10%	388	90%		3,489
		Rural-based Employment	2%	9	98%		428
		Employment Land Employment	95%	1,089	5%		57
		TOTAL	1,486	TOTAL	3,974	5,460	

Demand	Employment Land Demand (Ha)	Number of Jobs on Employment Lands	1,486
		Estimated Average Density (jobs / net ha)	20
		<b>Employment Land Need (ha)</b>	<b>74</b>

			<b>2041</b>
Employment Land Budget Results	Supply	Net Vacant Developable Supply	113.5
		Adjustment for long-term vacancy and underutilization	0.85
		Long-term Development Supply	96
	Demand	Employment Land Need (ha)	74
	<b>Result (Supply - Demand)</b>	<b>Sufficiency of Supply: Excess vs (shortage) ha</b>	<b>22</b>



# Appendix III: Detailed Retail Inventory

## Food Store Retail (FSR)

The existing FSR commercial facilities in Collingwood consist of a broad range of commercial functions, including large format grocery stores, boutique speciality stores, neighbourhood convenience stores, and other formats. As shown in Figure 1 Collingwood contains an estimated 21,350 square metres (229,800 square feet) of FSR commercial space. This total includes 15,470 square metres (166,500 square feet) of Supermarket space and 5,880 square metres (63,300 square feet) of Convenience and Specialty Food Store space. The highest distribution of FSR facilities are located in the Downtown Core.

As illustrated in Figure 2 there are four supermarkets operating within Collingwood, comprising a total of some 15,470 square metres (166,500 square feet). The largest supermarket, Loblaws, accounts for 6,130 square metres (66,000 square feet) and is situated at the corner of Hurontario Street and First Street in the Downtown Core. This total does not account for the large format Walmart Supercentre located in the Western Regional Commercial Node that has a food component equivalent to that of a supermarket.

## Beer, Wine, and Liquor Stores (BWL)

As shown in Figure 3, Collingwood contains an estimated 1,290 square metres (13,900 square feet) of BWL commercial space. The Town's LCBO is located in the Downtown Core, and The Beer Store is located in the first Street Corridor.

## Non-Food Store Retail (NFSR)

The Town of Collingwood includes an estimated 84,395 square metres (908,400 square feet) of total NFSR space. The store categories Building and Outdoor Home Supplies (21,165 square metres - 227,800 square feet) and General Merchandise (21,035 square metres - 226,400 square feet) account for the largest portions of total NFSR space.

The most significant concentration of NFSR space in Collingwood is located within the Western Regional Commercial node, which is home to major retailers including the Walmart Supercentre, The Home Depot, Canadian Tire, Winners, and Dollarama. It is also important to note that Sporting Life (located at 222 Hurontario Street) burned down a few days before the commercial inventory took place. As a result, 835 square metres (9,000 square feet) of Miscellaneous Retailers space was removed from our commercial inventory, however, it is anticipated that Sporting Life will either re-build their space in the coming years or move to another commercial space in Collingwood.

## Services

Based on the commercial inventory, it is estimated that Collingwood has 2,040 square metres (883,100 square feet) of service commercial space. Food Services & Drinking Places account for 18,960 square metres (204,100 square feet) and represents the largest proportion of service space in Collingwood. The Downtown Core and First Street Corridor account for most of the Food Service & Drinking Places, both of which have a robust mix of full-service restaurant, limited-service restaurants, and drinking places.

In regard to service commercial distribution throughout Collingwood, nearly 50% of existing space is located in the Downtown Core. This high share of service space could be due to the Downtown Core's centrality and the availability of office space, which has attracted a much higher share of Health Care, Finance, and Professional, Scientific, and Technical services than other nodes. It may also be due to some planning policies that favour the Downtown Core over other locations within the Town.

Store Type	Downtown Core	First Street Corridor	Western Regional Commercial	Hume Street Corridor	Southeast Commercial	Remainder of Town	Total
<b>Food Store Retail</b>							
Convenience and Specialty Foods	23,300	14,100	4,00	7,500	6,000	8,400	<b>63,300</b>
Supermarkets & Grocery	95,800		70,700				<b>166,500</b>
<b>Total</b>	<b>191,100</b>	<b>14,100</b>	<b>74,700</b>	<b>7,500</b>	<b>6,000</b>	<b>8,400</b>	<b>229,800</b>

Figure 1: Food Store Retail Commercial Facilities, Collingwood



	Store Name	Node	Address	Square Feet
1	Fresh Co.	Node 3 - Western Regional Commercial	55 Mountain Rd	31,100
2	Metro	Node 3 - Western Regional Commercial	640 First Avenue Extension	39,600
3	Loblaws	Node 1 - Downtown Core	12 Hurontario St	66,000
4	Sobeys	Node 1 - Downtown Core	39 Huron St	29,800
				<b>166,500</b>

Figure 2: Supermarkets in the Town of Collingwood

Store Type	Downtown Core	First Street Corridor	Total
<b>Beer, Wine &amp; Liquor Stores</b>			
Beverage Store	6,400	7,500	13,900
<b>Total</b>	<b>6,400</b>	<b>7,500</b>	<b>13,900</b>

Figure 3: Beer, Wine, and Liquor Store Commercial Facilities, Collingwood

Store Type	Downtown Core	First Street Corridor	Western Regional Commercial	Hume Street Corridor	Southeast Commercial	Remainder of Town	Total
<b>Non-Food Store Retail</b>							
Apparel and Accessories	43,500	2,700	37,400				<b>83,600</b>
Automotive	4,400				23,900	6,00	<b>34,300</b>
Building and Outdoor Home Supply	7,900	2,100	98,000	25,800	24,700	69,300	<b>227,800</b>
Furniture, Home Furnishings & Electronics Store	21,600	2,600	27,400	13,400	46,000		<b>111,000</b>
General Merchandise	18,100		208,300				<b>226,400</b>
Miscellaneous Retailers	40,700	25,900	60,400		26,500	23,200	<b>176,700</b>
Pharmacies & Personal Care	21,700	20,100	3,500	3,300			<b>48,600</b>
<b>Total</b>	<b>157,900</b>	<b>53,400</b>	<b>435,000</b>	<b>42,500</b>	<b>121,100</b>	<b>98,500</b>	<b>908,400</b>

Figure 4: Non-Food Store Retail, Collingwood

Store Type	Downtown Core	First Street Corridor	Western Regional Commercial	Hume Street Corridor	Southeast Commercial	Remainder of Town	Total
<b>Services</b>							
Consumer Goods Rental			2,500	1,000		2,700	<b>6,200</b>
Cultural, Entertainment & Recreation	22,100		31,100		30,600	36,900	<b>120,700</b>
Finance	54,800	5,700		1,300			<b>61,800</b>
Food Service & Drinking Places	77,700	70,800	35,600	4,700	10,400	4,900	<b>204,100</b>
Health Care	98,200	5,500	6,00	19,700	8,500		<b>137,900</b>
Insurance and Real Estate	37,500	5,900	6,000		3,900		<b>53,300</b>
Personal & Households Goods Repair		10,200			10,900	6,500	<b>27,600</b>
<b>Personal Care</b>	<b>52,400</b>	<b>10,100</b>	<b>15,400</b>	<b>3,600</b>		<b>7,600</b>	<b>89,100</b>
Professional, Scientific & Technical Services	61,600	8,000	7,800	7,500	9,800	26,700	<b>121,400</b>
Selected Civic & Social Organizations	9,700				2,300		<b>12,000</b>
Selected Educational Services	12,600			1,600	18,200		<b>32,400</b>
Selected Office Administrative Services	6,500	1,200					<b>7,700</b>
Social Services	6,400	1,200					<b>7,600</b>
Transportation		1,300					<b>1,300</b>
<b>Total</b>	<b>439,500</b>	<b>119,900</b>	<b>104,400</b>	<b>39,400</b>	<b>94,600</b>	<b>85,300</b>	<b>883,100</b>

Figure 5: Service Commercial Facilities, Collingwood

# Appendix

## Land Use Planning in Ontario

Land use planning is the process of decision-making for the management of our land and resources. Land use planning is regulated under Ontario's policy led land use planning system, which is given legal authority under the Planning Act. The Planning Act defines:

- > How the land use planning system works;
- > Who makes decisions;
- > How to resolve disputes and seek public input; and,
- > Provincial and municipal roles in planning administration.

Land use planning helps each community to set development goals while keeping social, economic and environmental factors in mind. It helps decide where in our communities homes and factories should be built; where parks and schools should be located; and where roads, sewers and other essential services should be provided. Good land use planning leads to orderly growth and the efficient provision of services. It touches all of us and helps us to have the kind of community we want.

## The Town's Role in Land Use Planning

The Town of Collingwood has a major role in land use planning. The Town uses the Official Plan, Zoning By-law, development application approval processes, and transportation and infrastructure planning, among other tools, to help decide how to grow and develop, while keeping important social, economic and environmental concerns in mind. The approvals processes for land use planning and land development balance the interests of individual property owners with the wider interests and objectives of the whole community.

## Role of the Official Plan

Collingwood's Official Plan is a key element of Ontario's policy led planning and development system, however, it is not the only element.

The Collingwood Official Plan is required to conform with the County of Simcoe Official Plan, and both of those Plans are required to conform with/be consistent with a host of Provincial legislation, plans, policies and regulations, not the least of which are the Planning Act, the Growth Plan and the Provincial Policy Statement.

The Official Plan provides the overarching policy framework within which growth and development is to proceed over the defined planning horizon. The Official Plan includes a vision and principles, and a policy framework that is aimed at achieving the vision and principles over time.

The Official Plan is given a more legal framework through the Implementing Zoning By-law. The Implementing Zoning By-law provides very specific regulations and provisions that define what, and where development is to occur, and how it is to be configured (height and massing) on any given property. For projects where the Town may wish to exert control even more specifically over the architectural details, colours and materials, as well as landscape treatments - the Site Plan Approval process is implemented.

The New Collingwood Official Plan (NCOP) is the most important vehicle for achieving comprehensive, integrated and long-term planning within the Town. The NCOP will:

- > Provide policy direction on matters of growth and development within the Town. It sets the policy foundation for regulating the development and use of land. It also supports the overarching goal to enhance the quality of life for all residents of Collingwood;
- > Provide a framework for comprehensive, integrated, place-based and long-term planning that supports and integrates the principles of strong communities, a clean and healthy environment and economic growth, for the long term;
- > Support improved land use planning and management, which contributes to a more effective and efficient land use planning system within the Town; and,
- > Coordinate cross-boundary matters to complement the actions of other planning authorities and promote mutually beneficial solutions.





