



 **Watson
& Associates**
ECONOMISTS LTD.



City of Kawartha Lakes G.M.S.

Council Meeting
May 21, 2024

Agenda



- Project update
- Settlement Area hierarchy & components of Urban Settlement Areas
- City of Kawartha Lakes growth scenarios
- Draft Community Area & Employment Area land needs for Urban Settlement Areas
- Settlement Area of Lindsay – Growth Analysis
- Next steps

City of Kawartha Lakes GMS Project Schedule



Phase 1 - Technical Analysis : Growth Analysis and Land Needs
(April 2022 – March 2023)

Phase 2 – Strategic Recommendations & Finalization of G.M.S.
(November 2023 – October 2024)

Study Commenced
(June 2021)

Discussion Paper
(January 2022)

Technical Analysis using Growth Plan Ref. Forecast
(February 2022 - January 2023)

Addl. Growth Scenarios and Draft Land Needs
(February / March 2023)

Release of P.P.S. 2023; Approval of additional lands in MZO
Study Paused; Review of Scope of Work
(April 2023 – September 2023)

Technical Analysis (Phase 2 – Strategic Directions)
(November 2023 – June 2024)

Draft GMS Report
(Fall 2024)

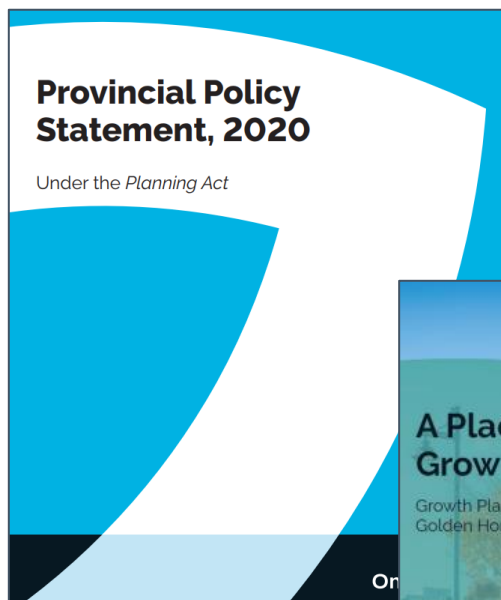
Previous Update to CoW (January 2023)

We are here

Ongoing Tasks:

- Lindsay Buildout Scenario and Phasing
- Employment Conversions Analysis
 - Urban Expansion Options
 - Strategic Recommendations

Proposed Changes to Policy Framework Overview

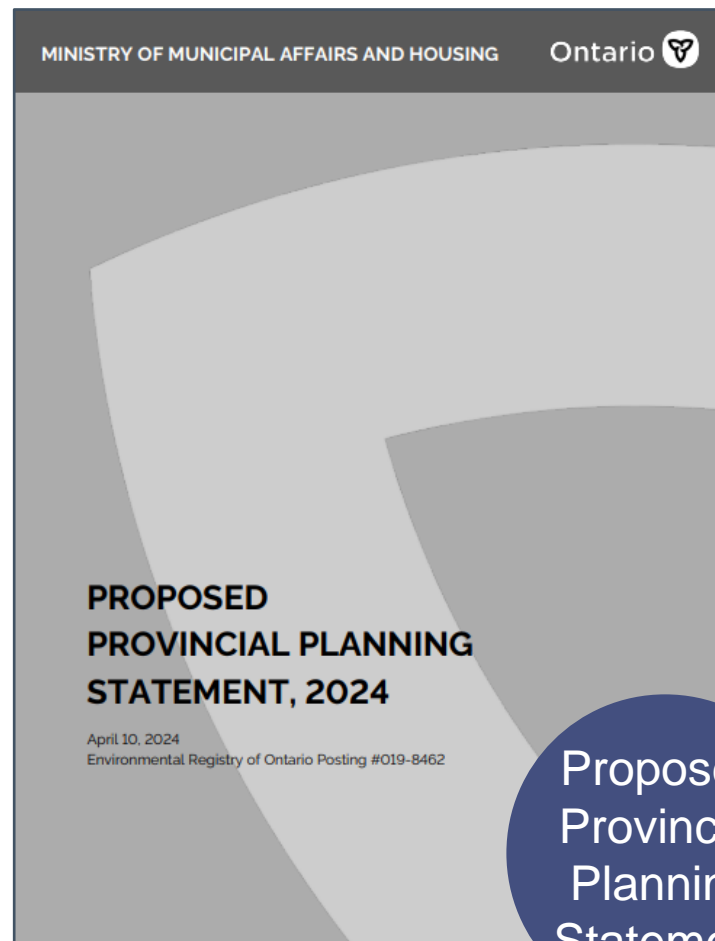


Provincial Policy Statement (PPS)
– Entire Province



Growth Plan –
GGH

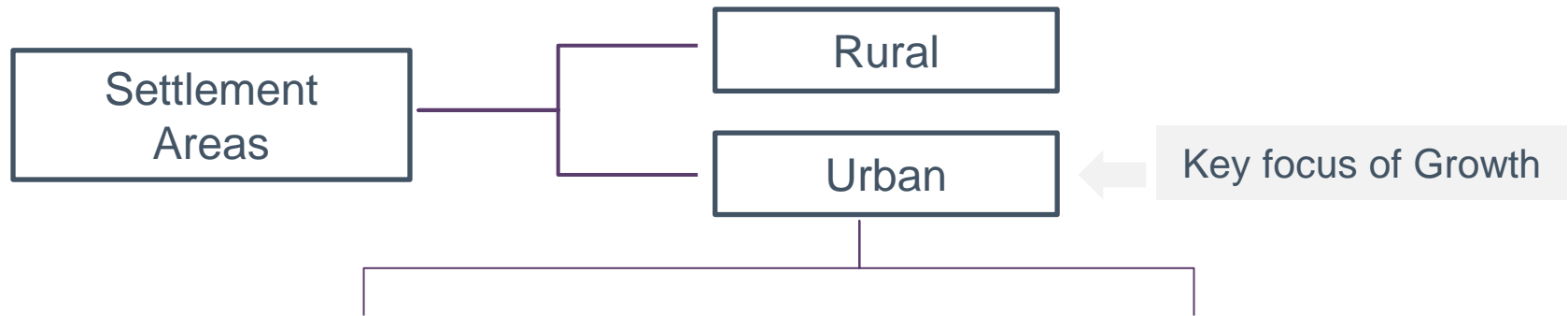
Integrated Policy Document



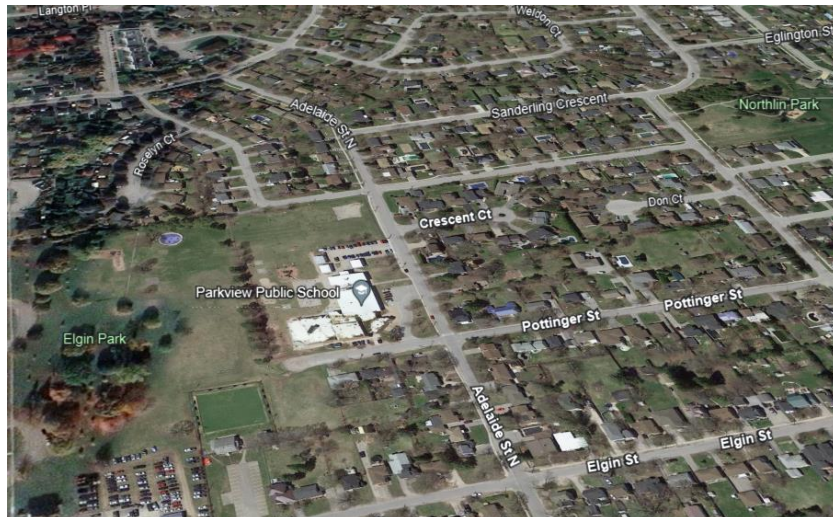
Proposed
Provincial
Planning
Statement

Hierarchy and Components of Settlement Area

Settlement Area Hierarchy & Components



Community Areas



All forms of housing and most population-related jobs and office jobs

Employment Areas

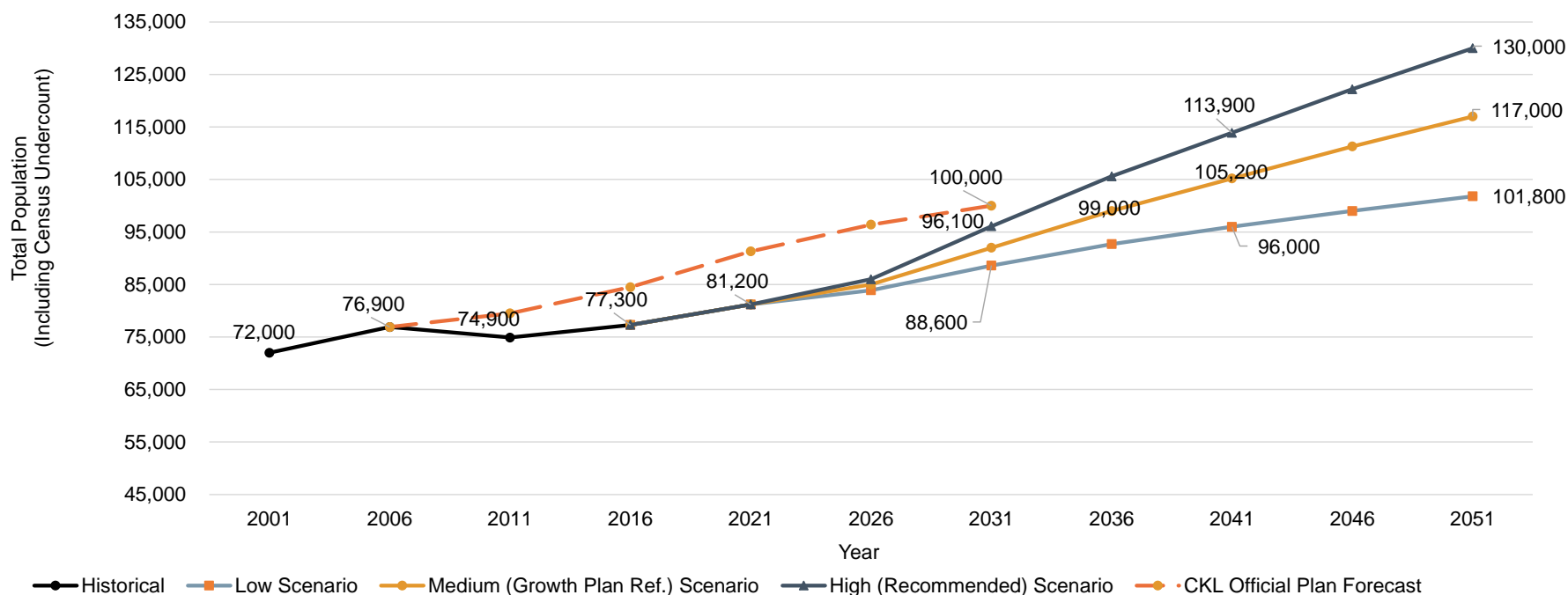


Employment in industrial-type buildings, some office and population-related jobs

City-Wide Population, Housing and Employment Growth Scenarios

City of Kawartha Lakes GMS

Population Growth Scenarios



Note: Population includes net Census undercount.

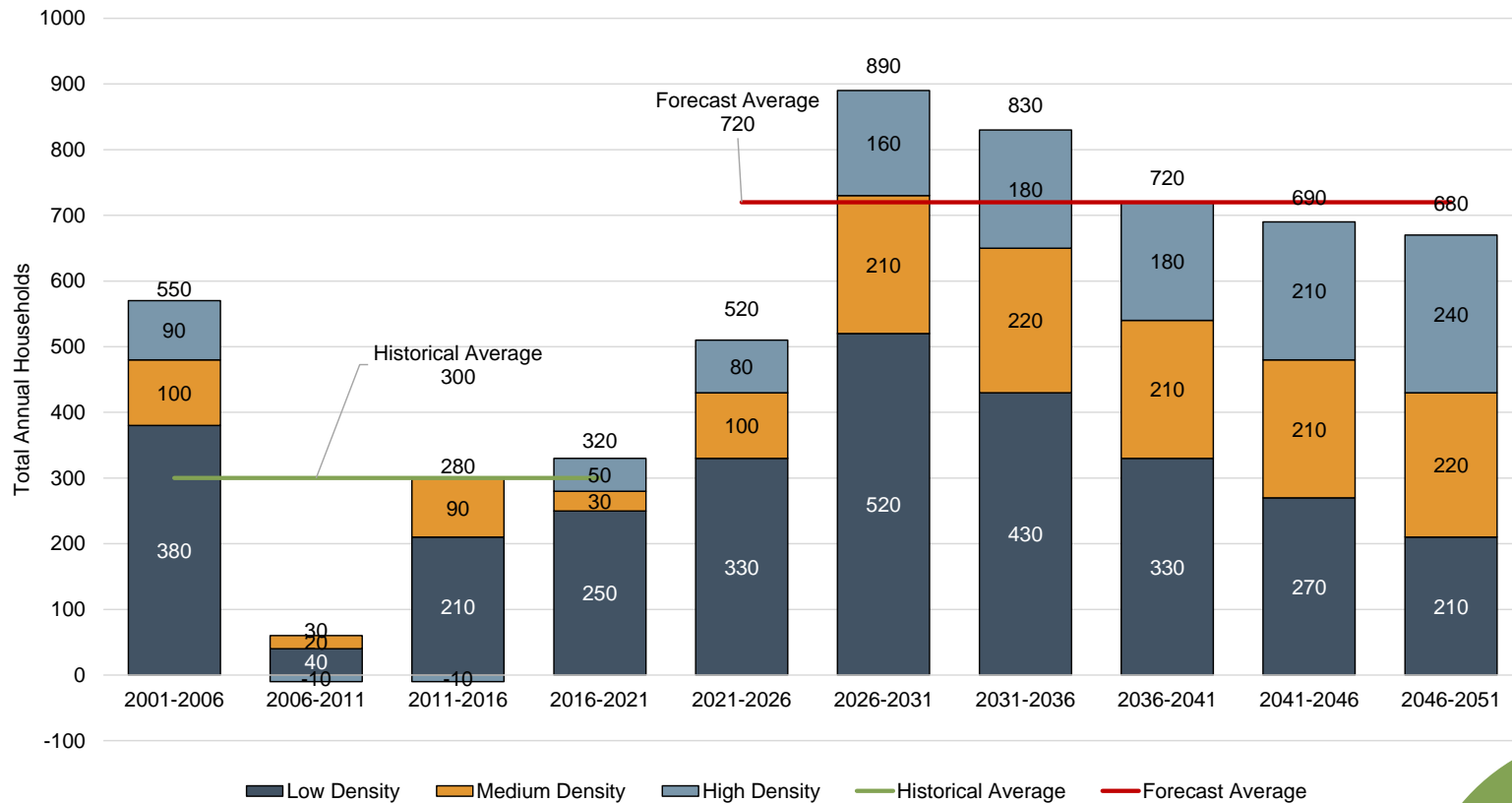
Source: Historical derived from Statistics Canada Census data, 2001 to 2021, Low, Medium and High Scenarios by Watson & Associates Economists Ltd.

	Annual Growth Rate				
	2001-2016	2016-2021	2021-2031	2021-2041	2021-2051
Historical	0.47%	0.99%			
Low Scenario			0.88%	0.84%	0.8%
Medium (Growth Plan Reference) Scenario			1.26%	1.30%	1.2%
High (Recommended) Scenario			1.70%	1.71%	1.6%

City of Kawartha Lakes



Annual Housing Forecast to 2051 (High Scenario) – 5 Yr Increments



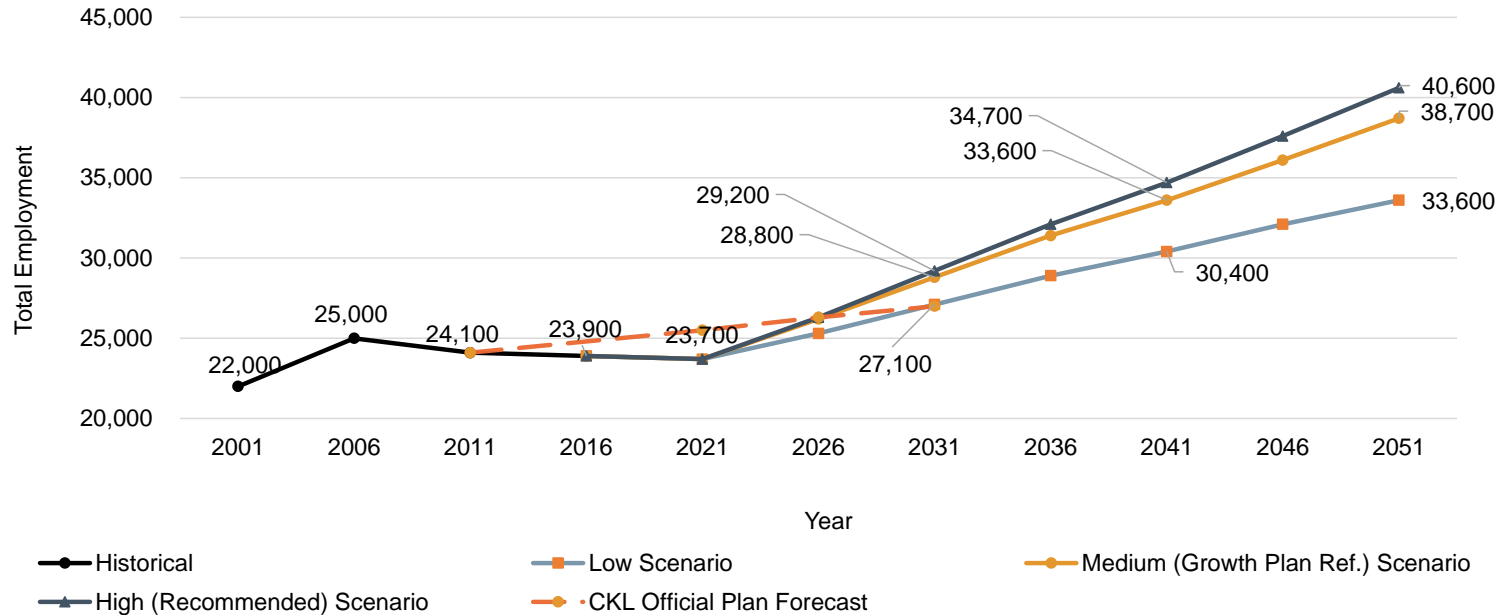
Low density includes singles and semis
Medium density includes townhouses and apartments in duplexes
High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Historical based on Statistics Canada Census Data; Forecast by Watson & Associates Economists Ltd.

Total Housing Growth 2021 – 2051 : 21,600 Units

2021-51
Growth
Rate
1.7%

City of Kawartha Lakes Employment Forecast Scenarios



Low
Scenario
Growth
Rate
1.3%

High
Scenario
Growth
Rate
1.9%

Note: Total employment includes no fixed place of work and work at home employment.
Source: Historical derived from Statistics Canada Census data, 2001 to 2021. Low, Reference and High Scenarios by Watson & Associates Economists Ltd.

Urban Community Area Land Needs

City of Kawartha Lakes GMS

Overview of Community Area Land Needs Scenarios



	Option 1	Option 2	<i>Option 3 (Recommended Option)</i>
DGA Density (People and Jobs / ha)	40	45	<i>45</i>
Intensification % (2021-2051)*	30%	30%	<i>20%</i>

*Intensification includes housing growth in City's Built Boundary (Boundary identified by the Province for areas that have been built as of 2006)

**Option 3 recommended (Task Force Meeting –
January / February 2023)**

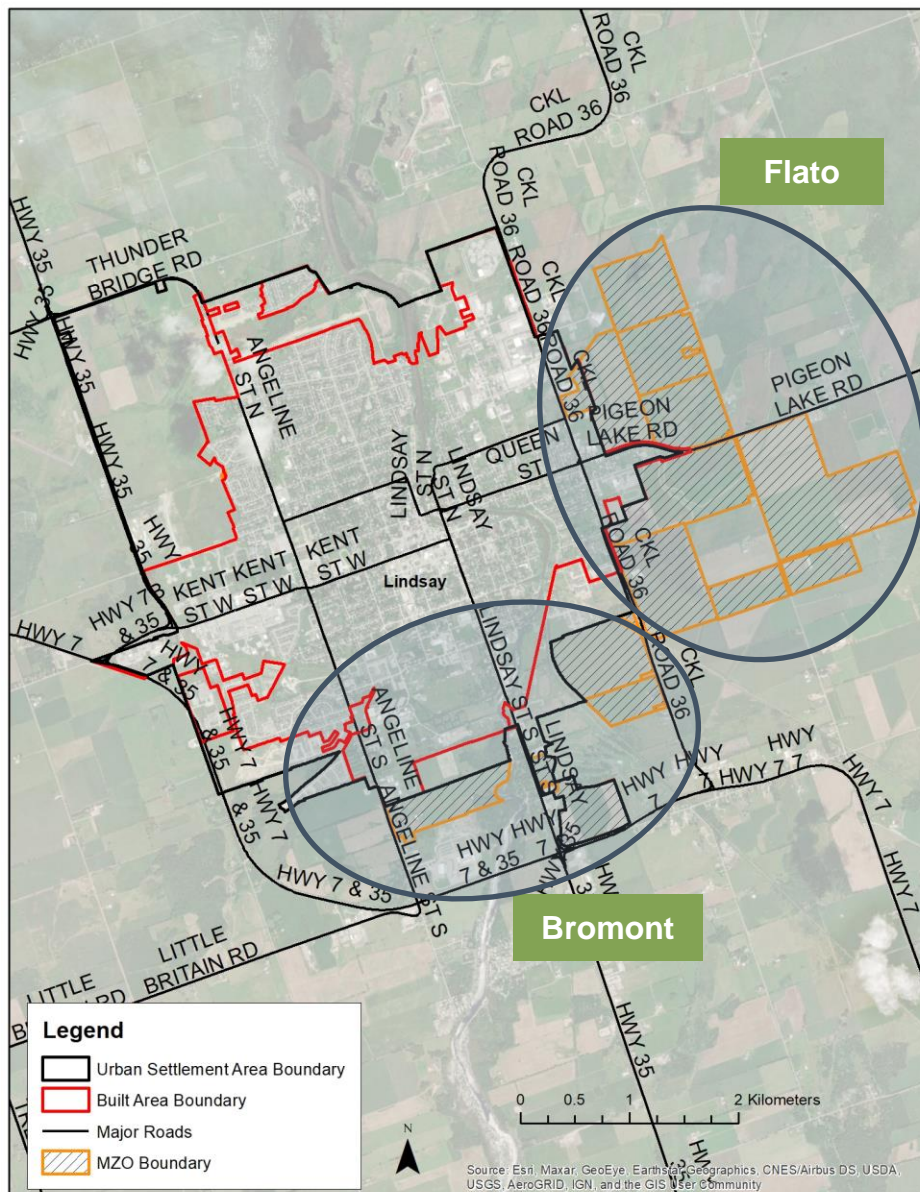
Draft DGA Land Needs to 2051 – High Scenario



Assessment of Urban Land Expansion Options for Fenelon Falls and Bobcaygeon is being undertaken (including consideration of growth requests)

Lindsay Urban Settlement Area Growth Analysis

Lindsay



Lindsay DGA Lands	Housing Units
Active Development Applications	4,650
Unit Potential on Vacant Greenfield Lands	1,510
Flato (MZO)	8,340
Bromont (MZO)	2,250
Total DGA Housing Unit Supply Potential	16,750
DGA Housing Demand – 2024 - 2051	12,590
DGA Housing Surplus	4,160

Supply data based on City of Kawartha Lakes Data (As of 2022).
Demand forecast by Watson & Associates Economists Ltd.

The above table excludes housing unit supply and demand within the Built-Up Area

***Housing Supply in Lindsay
(including M.Z.O.s) exceeds the
demand to 2051***

City of Kawartha Lakes GMS

Lindsay – 2021 – 2051 and Buildout Forecast



Year	Lindsay Population	Lindsay Employment	Lindsay Employment Activity Rate*
2021	23,600	15,800	68%
2051	59,700	31,400	53%
Buildout	74,100	38,800	52%

* Activity Rate is defined as the ratio of jobs to population

Should market demand dictate faster population and employment growth, timing of Buildout may be accelerated. Periodic review / monitoring of growth is recommended.

2021 – 2051
Population
Growth Rate
3%

City of Kawartha Lakes GMS

Lindsay – Phasing



Key Considerations:

- Achieve complete communities
- Support new development adjacent to existing built up areas
- Optimize existing infrastructure
- Support the introduction of transportation links
- Prolong agricultural uses as long as feasible

2024 - 2031

- Majority of lands within Active Development Applications
- Municipally Serviced Lands
- Lands directly adjacent to BUA

2031 - 2041

- Inactive designated residential lands
- Certain approved MZO lands within existing urban boundary / adjacent to BUA.

2041 -
Buildout

- Remaining approved MZO lands located outside urban settlement area boundary

Employment Area Land Needs



Lindsay
2021 - Buildout

Deficit of
41 ha**

- Approx. 41 Gross ha employment land needed in Lindsay
- No Expansion options are required for Fenelon Falls, Bobcaygeon and Omemee for Employment Areas.
- Land absorption to be monitored and reviewed periodically.

*** Accounts for vacant Employment Areas recommended for conversion to residential or other non employment uses. May be updated upon review by the City.*

Conclusions and Next Steps

Urban Land Needs Conclusions



- Settlement Area (including MZOs) of Lindsay has a surplus of Community Area land to 2051.
- Approximately 38 ha and 23 ha area required for future urban expansion in Fenelon Falls and Bobcaygeon respectively. Location options will be provided in draft report.
- There is a small deficit of Employment Lands in Lindsay and deficit may increase if existing vacant Employment Area sites are converted to non employment uses.



Next Steps

Completion of Phase 1 technical Analysis (June 2024)

- *Lindsay – Buildout and Phasing of DGA Lands (June 2024)*
- *Location Options – Criteria / Potential Sites for Bobcaygeon and Fenelon Falls (June 2024)*
- Employment area conversion analysis (June 2024)

Phase 1 Consultation and Reporting (June 2024):

- Technical Advisory Team and Task Force Meeting (June 2024)
- Public Release of Memo / Summary of Key findings of Phase 1 Analysis (June 2024)

Completion of Phase 2 : Strategic Recommendations (July - August 2024)

- Strategic Recommendations (July - August 2024)

Phase 2 Consultation and Reporting (August to October 2024):

- Task Force Meeting (August 2024)
- Public Release of Memo / Summary of Key findings of Phase 1 & 2 Analysis (September 2024)
- Draft G.M.S. Report (September 2024)
- Presentation of final results to Council (October 2024)
- Study Report to be finalized in October 2024

Questions