



 **Watson
& Associates**
ECONOMISTS LTD.

Growth Management Strategy – Growth Review and Allocations

Town of Bradford West Gwillimbury

Final Report

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
B.U.A.	Built-up area
COVID-19	Coronavirus disease
C.M.A.	Census Metropolitan Area
C.D.	Census Division
D.G.A.	Designated greenfield area
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.M.S.	Growth Management Strategy
Growth Plan	A Place to Grow: Growth Plan for the Greater Golden Horseshoe
G.T.H.A.	Greater Toronto and Hamilton Area
I.M.F.	International Monetary Fund
L.N.A.	Land Needs Assessment
M.C.R.	Municipal Comprehensive Review
M.O.F.	Ministry of Finance
M.Z.O.	Minister's Zoning Orders
N.P.R.	non-permanent residents
O.P.	Official Plan
P.P.S., 2020	Provincial Policy Statement, 2020
P.P.S., 2024	Provincial Planning Statement, 2024
P.P.U.	persons per unit
S.A.B.E.	Settlement Area Boundary Expansion
S.C.O.P.A.	Simcoe County Official Plan Amendment
U.S.	United States



Executive Summary

Terms of Reference

Watson & Associates Economists Ltd. (Watson), in association with WSP Canada Inc., was retained in the summer of 2024 to undertake a Growth Management Strategy (G.M.S.) for the Town of Bradford West Gwillimbury to guide growth over the next 30 years. The G.M.S. is informed by the results of Simcoe County's Municipal Comprehensive Review (M.C.R.) and prepared under the provincial and regional planning frameworks. The Town is planning to implement the G.M.S. through a series of Official Plan Amendments that will establish clear direction for growth and set a planning horizon to the year 2051. As part of the G.M.S., Watson has prepared this Background Report, as a foundational report that distills the County's M.C.R. results for the Town of Bradford West Gwillimbury. Furthermore, this Background Report includes a summary of the long-term economic and population growth outlook for the Town within the context of recent local and regional trends and provincial planning policy reform. Finally, the Background Report provides preliminary growth allocations by urban settlement area and rural area within the Town of Bradford West Gwillimbury (i.e., Bradford, Bond Head, and Remaining Rural Area). Further reports to be prepared by Watson as part of the Bradford West Gwillimbury G.M.S. include an Intensification Analysis Report and an Employment Strategy Report.

Provincial Policy Context

On August 19, 2024, the Province released the Provincial Planning Statement, 2024 (P.P.S., 2024), which replaces the Provincial Policy Statement, 2020 (P.P.S., 2020) and a Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 as an integrated document. The P.P.S., 2024 was released in coordination with Bill 185, *Cutting Red Tape to Build More Homes Act*. The P.P.S., 2024 came into effect on October 20, 2024.

A key focus of the P.P.S., 2024 is that it recognizes that the approach to delivering housing needs and Employment Area land need requirements will vary by municipality and, as such, it moves away from a prescriptive guideline-based approach.



Simcoe County Official Plan Amendment 7

As part of the Region's Official Plan (O.P.) review process, the County undertook a growth management strategy (G.M.S.) to accommodate population, housing, and employment growth to 2051 in accordance with provincial planning requirements. Simcoe County Official Plan Amendment 7 (S.C.O.P.A. #7) is the first phase of the County's G.M.S. The County's long-term growth outlook explores various forward-looking assumptions regarding residential intensification and greenfield density by Area Municipality within the context of provincial planning policy. Furthermore, the County's G.M.S. also determines the amount of urban land required to accommodate the growth outlook using an approach that divides the County into a Southern Regional Market Area and a Northern Regional Market Area. About 63% of all population growth in the County is forecast to occur in the Southern Regional Market Area, mainly in the Town of Innisfil, the Town of Bradford West Gwillimbury, the Township of Essa, and the Town of New Tecumseth. Based on S.C.O.P.A. #7, the Town of Bradford West Gwillimbury is anticipated to reach a population of approximately 83,500 and 30,900 jobs by 2051.

Broader Regional Context and Growth Drivers

In many respects, the Town's long-term population and employment growth potential is largely tied to the success of the broader regional economy. The Town of Bradford West Gwillimbury is well positioned to continue to attract and accommodate steady population and employment growth over the next three decades. A key driver of this long-term population and employment growth potential is the Town's geographic location within the Greater Golden Horseshoe (G.G.H.) region, in particular its proximity to the Greater Toronto and Hamilton Area (G.T.H.A.). The Town of Bradford West Gwillimbury is located at the northern boundary of the Toronto Census Metropolitan Area (C.M.A.). To the north of Bradford West Gwillimbury's municipal boundary lies the Barrie C.M.A. This geographic location enables Bradford West Gwillimbury to attract labour from both the Barrie and Toronto C.M.A.s. Due to the larger scale of the Toronto C.M.A. in relation to the Barrie C.M.A., however, it exerts a greater influence on Bradford West Gwillimbury, especially for out-commuting (i.e., residents commuting to other markets in the Toronto C.M.A.). This dynamic makes Bradford West Gwillimbury unique within Simcoe County, especially given its access to Highway 400 and proximity to G.T.H.A. markets.



Over the past several decades, population growth within the Town of Bradford West Gwillimbury has been largely driven by net migration of working-age adults from other areas within the Province, in particular large urban municipalities within the G.T.H.A. Rising housing costs in the G.T.H.A. are expected to continue to drive growth outward into the Outer Ring of the G.G.H. (i.e., G.G.H. municipalities located outside the G.T.H.A.). This trend has been increasing with respect to families moving from the G.T.H.A. who are often seeking more affordable grade-related housing options in municipalities located in Simcoe County and other regions within the G.G.H Outer Ring and Southern Ontario.

It is important to recognize that while the Town's population base is growing, it is also getting older. Between 2021 and 2051, the 75+ age group is forecast to represent the fastest growing population age group within the Town. With an aging population, the Town will be more reliant on net migration as a source of population as opposed to natural increase (i.e., net population growth from births less deaths). With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density housing forms, including seniors' housing and affordable housing options. The aging of the local and regional population base is also anticipated to place downward pressure on labour force participation rates and economic growth for the Town, the County and the Province.^[1]

Town of Bradford West Gwillimbury Long-Term Population and Housing Forecast

Over the 2016 to 2021 period, the Town of Bradford West Gwillimbury's population increased from 36,800 to 44,700 persons. This represents an annual growth rate of 4.0%, which is higher than the growth rate experienced during the past 20 years, based on Census years (3.4%). Over the past 2016 to 2021 period, the Town's population growth rate was higher than the growth rate of the County (2.2%) and the provincial average (1.4%) over the same period.^[2] The Town of Bradford West Gwillimbury has accommodated 15% of the population growth within the County of Simcoe over the past five years. Recognizing the strong growth potential within Bradford West Gwillimbury, the Town is anticipated to accommodate 17% of the population growth within the County of Simcoe to 2051 based on the County's forecast, S.C.O.P.A. #7.

^[1] The participation rate is the number of labour force participants expressed as a percentage of the population 15 years of age and over.

^[2] Based on Statistics Canada Census data.



Watson has reviewed the population, housing, and employment forecasts prepared as part of S.C.O.P.A. #7. As part of this review, relatively minor adjustments have been made to the 2021 population based on a review of the Statistics Canada 2021 Census, which has been upwardly adjusted for the Census undercount at 4%.^[3] In addition, Watson has examined recent development activity through mid-2024 and considered this anticipated development activity to inform the growth forecast review over the short and medium term. It is noted that recent population and housing growth trends in the Town are tracking close to the Simcoe County forecast. The short-term (i.e., 2016 to 2026) population and housing forecast set out in the Simcoe County G.M.S. assumes robust growth for the Town relative to historical growth achieved in recent decades.

By 2051, the Town is forecast to accommodate a population of 83,500, an increase of 38,800 or 1,290 residents annually over the 2021 to 2051 period, representing an annual population growth rate of 2.1%. While the growth rate remains robust, it is slightly lower than the Town's historical average annual population growth rate of 3.4% achieved over the last 20 years.

Over the 2014 to 2023 period, the Town of Bradford West Gwillimbury issued building permits for the construction of 411 new housing units annually. Since 2019, the Town has averaged 335 building permits for new housing units annually. Over the past five years, 2019 to 2023, low-density housing has accounted for 62% of the Town's housing activity, compared to 80% over the 2014 to 2018 period. Over the long-term planning horizon, housing demand is anticipated to gradually shift from low-density housing forms to medium- and high-density housing types, largely driven by the aging of the Town's population base and declining housing affordability.

Over the 2021 to 2051 period, the Town is forecast to add approximately 16,280 housing units over this period, or 543 units annually. It is important to note that based on a review of the housing forecast prepared by Simcoe County for the Town, Watson has modified the housing forecast by housing type to reflect recent housing development trends and anticipated development in active applications. As a result, the housing forecast by Watson is more oriented towards medium- and high-density housing over the long-term forecast. This change to the forecast housing mix supports

^[3] Based on Statistics Canada Census data. The Statistics Canada population is adjusted to account for the net number of persons who are missed (i.e., over-coverage less under-coverage) during enumeration.



the achievement of the Town's intensification target of 42% (as discussed later), which will require more emphasis on medium- and high-density housing units over the forecast horizon. Furthermore, this shift towards more medium- and high-density housing also aligns with anticipated demand towards an increasing share of affordable and attainable housing options within the Town.

Town of Bradford West Gwillimbury Long-Term Employment Forecast

The Town of Bradford West Gwillimbury offers a diverse range of economic and employment opportunities across various sectors. With a strong agricultural heritage, the Town boasts a thriving agricultural sector providing employment opportunities in farming and agri-food processing industries. In addition to agriculture, Bradford supports a robust manufacturing base and is home to some of the County's largest industrial businesses which are key anchors for the Employment Area base in the Town.

A key opportunity for success in attracting employers and labour force growth in the Town is the Bradford Bypass. The Bradford Bypass has proposed interchanges at the following locations: Highway 400 Freeway to Freeway Interchange, 10th Sideroad (County Road 54), County Road 4 (Yonge Street), Bathurst Street, 2nd Concession Road, Leslie Street and Highway 404 Freeway to Freeway Interchange. This significant infrastructure initiative is currently in the planning phase and aims to alleviate congestion on local highways while also fostering economic development opportunities to enhance the growth of Employment Area lands through improved access to 400-series highways.

By 2051, the Town is forecast to accommodate an employment base of 30,900, an increase of 18,400 or approximately 680 jobs annually over the 2024 to 2051 period. As a result, employment growth over that period is anticipated to increase at an annual rate of 3.4%.

A key consideration in planning for complete communities is the ability to accommodate jobs as the community's population grows. An employment activity rate, the ratio of jobs to population, is used to understand the relationship between population growth and employment growth. Over the forecast horizon, the employment activity rate is anticipated to increase from 26% in 2024 to 37% by 2051. The attainment of a higher employment activity rate will depend on the success of the Town to attract and



accommodate economic development across a broad spectrum of industries, notably in Employment Areas. A further review of employment will be carried out in the Employment Strategy Report as part of the Town of Bradford West Gwillimbury G.M.S.

Town of Bradford West Gwillimbury Residential Intensification Target

S.C.O.P.A. #7 considers any residential development within the delineated built-up area (B.U.A.) as intensification. All residential development within the B.U.A. counts towards the County's intensification target, regardless of housing type or form. Over the 2019 to 2023 period, the B.U.A. has accommodated 34% of the new housing unit activity within the Town of Bradford West Gwillimbury, averaging 115 new housing units annually. Low-density housing units have accounted for slightly more than one-third (37%) of the new housing units within the B.U.A., whereas medium-density housing units have represented nearly half (47%) of the new housing units in the B.U.A. High-density housing units have made up 17% of the new housing units within the B.U.A.

Going forward, the Town of Bradford West Gwillimbury is planned to accommodate a minimum target of 42% of its housing growth through intensification as identified in S.C.O.P.A. #7. As a comparison, the intensification rate target previously established by the County in the 2016 County O.P. was 40%.^[4] The intensification rate for Bradford West Gwillimbury is among the highest targets in the County, reflecting opportunities to accommodate a range of housing options in the Bradford Urban Area. In order for the Town to reach a 42% intensification rate to 2051, it is estimated that the Town will need to accommodate over 6,300 housing units in the B.U.A. over the 2024 to 2051 period.^[5] The intensification target would represent a significant increase in the amount of housing growth within the B.U.A. compared to historical levels. As previously discussed, over the 2019 to 2023 period, the Town averaged 115 new housing units annually.^[6] Over the 2024 to 2051 period, the intensification rate would result in an annual average of 233 units in the B.U.A., more than double the historical annual unit average recently achieved. The Intensification Analysis Report will further explore the opportunities and challenges in achieving the intensification target.

^[4] County of Simcoe Growth Forecasts and Land Needs Assessment prepared by Hemson Consulting Ltd., March 31, 2022, p. 58.

^[5] Based on S.C.O.P.A. #7.

^[6] Based on Town of Bradford West Gwillimbury residential building permit activity within the B.U.A.



Town of Bradford West Gwillimbury People and Jobs Density Target

S.C.O.P.A. #7 has identified that the Town of Bradford West Gwillimbury will target 55 people and jobs per hectare in the designated greenfield area (D.G.A.). This would result in an increase in the density currently set at approximately 35 people and jobs per hectare in the Town of Bradford West Gwillimbury O.P.^[7] Achieving a density target of 55 people and jobs per hectare will require the Town accommodates a broader range of housing options in the D.G.A. at higher average densities across all housing forms. Generally, the people and jobs density target for Bradford West Gwillimbury is in line with comparable municipalities across the G.G.H. The Town should continue to monitor density levels on greenfield lands.

Town of Bradford West Gwillimbury Community Area and Employment Area Land Needs to 2051

The County has identified that the Town of Bradford West Gwillimbury requires an additional **503 gross developable hectares for Community Area uses** to accommodate population-related employment uses and a shortfall of approximately 7,100 housing units. Other municipalities in Simcoe County with identified need for additional Community Area lands include the Township of Essa and the Town of New Tecumseh.

The County has not identified a need to expand Employment Area lands in the Town of Bradford West Gwillimbury. The County has identified the need to expand Employment Areas in the Town of New Tecumseh, the Town of Collingwood, and the Township of Clearview. It is important to note that Bradford West Gwillimbury will need to utilize its entire current Employment Area supply to meet the growth forecasts for 2051. Therefore, ongoing monitoring of the Employment Area is crucial due to this tight land supply. As part of the Employment Strategy Report, Watson will review the timing and phasing of Employment Area lands. Furthermore, Watson will review the demand and appropriate timeframe for the need of the Highway 400 Reserve Lands (approximately 160 developable hectares).^[8]

^[7] Town of Bradford West Gwillimbury Official Plan (March 21, 2021), Policy 3.2.1, p. 35.

^[8] S.C.O.P.A. #7 and Hemson Consulting Ltd. Land Needs Assessment Memorandum dated May 31, 2022.



Town of Bradford West Gwillimbury Local Growth Allocations to 2051

Based on a review of historical trends, anticipated development in planning applications, and discussions with the Town on opportunities and challenges by settlement area, Watson has allocated the Town of Bradford West Gwillimbury population and housing growth by the following areas:

- Bradford;
- Bond Head; and
- Remaining Rural (includes Newton Robinson Settlement Area, rural clusters and other remaining rural area).

Over the 2019 to 2023 period, the Bradford Urban Settlement Area has accommodated 88% of the new housing unit activity within the Town of Bradford West Gwillimbury. The Bond Head Settlement Area has accommodated 10% of the new housing unit activity within the Town of Bradford West Gwillimbury with all development activity concentrated in the last two years. The Rural Area has accommodated 2% of housing activity within the Town of Bradford West Gwillimbury.

Within the Bond Head Settlement Area, anticipated housing growth over the 2021 to 2051 period will largely be limited to current active developments due to servicing capacity (water/wastewater servicing) and available greenfield land supply. Furthermore, it is noted by Town staff that the existing residential area in Bond Head is not likely to experience a significant amount of intensification due to servicing constraints. According to the Town's O.P. (Bond Head Secondary Plan), Bond Head is anticipated to reach a population of 4,400 in approximately 1,300 housing units.^[9] Since 2021, the Town has issued building permits for the development of approximately 170 housing units in Bond Head and active development applications provide the potential for an additional 1,000 housing units.^[10] No other growth beyond this is anticipated in the Bond Head Settlement Area.

^[9] Town of Bradford West Gwillimbury Official Plan (March 21, 2021), Policy 5.1.1.2, p. 125.

^[10] Based on data from the Town of Bradford West Gwillimbury.



Due to provincial policy direction (P.P.S., 2024), which encourages growth to be directed to serviced settlement areas, growth within the Rural Area is anticipated to represent a slightly smaller share of the Town's growth over the long term.

The Town's housing growth has been allocated based on the above discussed assumptions. Growth within Bond Head over the 2021 to 2051 period is anticipated to represent 7% of the Town's housing growth based on recent building permit activity and anticipated housing in active development applications. As previously discussed, this represents the maximum amount of housing that can be accommodated in Bond Head based on greenfield land supply and servicing. The Rural Area is anticipated to represent 1% of the Town's housing growth. The Bradford Urban Area is anticipated to accommodate most of the Town's housing growth, representing 92% of the Town's growth. The Bradford Urban Area is anticipated to accommodate growth through intensification and greenfield area development.

Next Steps

This document serves as a foundational overview of S.C.O.P.A. #7 and is integral to the Town's G.M.S. As part of the Town of Bradford Gwillimbury's G.M.S., Watson will conduct further analysis to evaluate the potential for intensification in the Town and employment opportunities within the Town's designated Employment Areas. The forthcoming Intensification Analysis Report will examine intensification prospects within the major transit station area and identify additional opportunities throughout the Town. As previously noted, the Town aims to achieve an intensification rate that necessitates a strategic shift towards growth through intensification. The Intensification Analysis Report will identify key areas for intensification, referred to as strategic growth areas, and will summarize the potential for intensification over both short- and long-term periods. As part of the Employment Strategy Report, Watson will offer insights into expected absorption levels across the Town's Employment Areas, detailing the anticipated sectors and their influence on these levels. Additionally, the Employment Strategy will address the demand for the Highway 400 Reserve Employment Lands.



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson), in association with WSP Canada Inc., was retained in the summer of 2024 to undertake a Growth Management Strategy (G.M.S.) for the Town of Bradford West Gwillimbury to guide growth over the next 30 years. The G.M.S. is informed by the results of Simcoe County's Municipal Comprehensive Review (M.C.R.) and prepared under the provincial and regional planning frameworks. The Town is planning to implement the G.M.S. through a series of Official Plan Amendments that will establish clear direction for growth and set a planning horizon to the year 2051. As part of the G.M.S., Watson has prepared this Background Report, as a foundational report that distills the County's M.C.R. results for the Town of Bradford West Gwillimbury. Furthermore, this Background Report includes a summary of the long-term economic and population growth outlook for the Town within the context of recent local and regional trends and provincial planning policy reform. Finally, the Background Report provides preliminary growth allocations by urban settlement area and rural area within the Town of Bradford West Gwillimbury (i.e., Bradford, Bond Head, and the Remaining Rural Area). Further reports to be prepared by Watson as part of the Bradford West Gwillimbury G.M.S. include an Intensification Analysis Report and an Employment Strategy Report.

2. Policy Context

2.1 Provincial Policy Context

On August 19, 2024, the Province released the Provincial Planning Statement, 2024 (P.P.S., 2024), which replaces the Provincial Policy Statement, 2020 (P.P.S., 2020) and a Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (Growth Plan) as an integrated document. The P.P.S., 2024 was released in coordination with Bill 185, *Cutting Red Tape to Build More Homes Act*. The P.P.S., 2024 came into effect on October 20, 2024.

A key focus of the P.P.S., 2024 is that it recognizes that the approach to delivering housing needs and Employment Area land need requirements will vary by municipality



and, as such, it moves away from a prescriptive guideline-based approach. The following summarizes key highlights of the P.P.S., 2024.

Planning for Growth

- Compared to the P.P.S., 2020, the P.P.S., 2024 presents a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Additionally, it allows for planning of infrastructure, public service facilities, strategic growth areas, and Employment Areas to extend beyond this time horizon.^[11] As such, this suggests that municipalities are to designate land to accommodate growth for at least 20 years, but not more than 30 years with the opportunity to designate additional land beyond the 30-year time horizon for Employment Areas, strategic growth areas, and planning for infrastructure.^[12]
- The P.P.S., 2024 requires municipalities to consider population and employment growth forecasts prepared using Ministry of Finance (M.O.F) projections and allows municipalities to modify these forecasts as appropriate.^[13] It is important to note that the M.O.F. population forecasts are provided at the Census division^[14] level only, which typically represents upper-tier municipalities, including separated municipalities (e.g., the City of Barrie, the City of Orillia, and the County of Simcoe are included in the Simcoe Census Division) and large urban single-tier municipalities. The use of the M.O.F. forecasts is not meant to replace long-term forecasting by municipalities, but the forecasts are to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations.
- According to the P.P.S., 2024, Minister's Zoning Orders (M.Z.O.s) are to be treated as "in addition to projected needs" over the planning horizon. In planning for M.Z.O. lands, the P.P.S., 2024 states that these lands must be incorporated into the O.P. and related infrastructure plans.^[15]

^[11] Provincial Planning Statement, 2024, policy 2.1.3, p. 6.

^[12] Ibid.

^[13] Ibid.

^[14] Census division is a term used by Statistics Canada that refers to a large geographic area encompassing neighbouring municipalities that may share some common services (such as police or ambulance services).

^[15] Provincial Planning Statement, 2024, policy 2.1.3, p. 6.



- Density targets in the P.P.S., 2024 are noted as minimum standards and municipalities are encouraged to go beyond these minimum targets, where appropriate.
- The P.P.S., 2024 provides direction in planning for complete communities. This direction has been refined from the P.P.S., 2020 and requires municipalities plan for an appropriate range and mix of land uses, housing options, transportation options with multimodal access, employment, public service facilities and other institutional uses, recreation, parks and open space, and other uses to meet long-term needs. Furthermore, municipalities need to ensure that efforts are made to improve access for all members of the community and to reducing barriers.

Planning for Housing

- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated and available for residential development within the regional market area.^[16] It is noted, however, that the emphasis on intensification and redevelopment in this regard has been removed. Planning authorities are also required to maintain at all times, where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans within the regional market area.^[17]
- The P.P.S., 2024 requires municipalities to establish and maintain minimum targets for intensification and redevelopment within built-up areas (B.U.A.s), based on local conditions.^[18] Furthermore, municipalities are required to keep their zoning by-laws up to date by establishing minimum densities, heights, and other standards to accommodate growth and development.^[19]

^[16] Provincial Planning Statement, 2024, policy 2.1.4, p. 6.

^[17] According to the Provincial Planning Statement, 2024, an upper or single-tier municipality, or planning area, will normally serve as the regional market area.

^[18] Provincial Planning Statement, 2024, policy 2.3.1.4, p. 8.

^[19] Ibid., 2024, policy 6.1.6, p. 32.



Settlement Area Boundary Expansions

- According to the P.P.S., 2024, a settlement area boundary expansion (S.A.B.E.) is allowed at any time and without the requirement of a Comprehensive Review, provided that the S.A.B.E. meets the criteria established in policy 2.3.2.1. The criteria includes establishing the need to designate and plan for additional land to meet an appropriate range and mix of land uses, supported by infrastructure and public facilities, while limiting the impact on agricultural areas. Furthermore, the S.A.B.E. is to support a phased progression of urban development. Overall, the policies allow for a simplified and flexible approach for municipalities to undertake a S.A.B.E.^[20]

Planning for Employment

- Unchanged from the P.P.S., 2020, major office and major institutional development should be directed to major transit station areas or other strategic growth areas where frequent transit service is available, according to the P.P.S., 2024.^[21]
- The P.P.S., 2024 includes an updated definition of Employment Area based on the amendment of the *Planning Act* on June 8, 2023. The *Planning Act* was amended under subsection 1 (1) to include a new definition of “area of employment.” This definition of Employment Area has been scoped to include only industrial-type employment as a primary use. The amendment to the *Planning Act* received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the *Planning Act* is now in effect in concert with the P.P.S., 2024.
- According to the P.P.S., 2024, municipalities are to assess and update Employment Areas identified in Official Plans (O.P.s) to ensure that this designation is appropriate to the planned function of Employment Areas.^[22]
- The P.P.S., 2024 requires that municipalities designate, protect, and plan for all Employment Areas in settlement areas by:
 - planning for the long-term needs of Employment Area uses;

^[20] Provincial Planning Statement, 2024, policy 2.3.2, p. 9.

^[21] Ibid., policy 2.8.1.4, p. 13.

^[22] Ibid., policy 2.8.2.4, p. 14.



- prohibiting residential uses, commercial uses, public service facilities, other institutional uses, and retail and office uses not associated with the primary employment use; and
 - providing an appropriate transition to adjacent non-Employment Areas to ensure land use compatibility and economic viability.^[23]
- Under the P.P.S., 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Previously, under the P.P.S., 2020 and the Growth Plan, municipalities were required to review changes to designated Employment Areas during an M.C.R. Under the P.P.S., 2024, municipalities are required to demonstrate that there is an identified need for the removal and that the land is not required for Employment Area uses over the long term. Furthermore, municipalities need to demonstrate that the proposed change from Employment Area to a non-Employment Area use does not undermine the overall viability of the Employment Area.^[24]
- The P.P.S., 2024 requires that all development within 300 metres of Employment Areas shall avoid, or mitigate, potential impacts on the “long-term economic viability” of employment uses.^[25] This means that when planning for Employment Areas or other uses in proximity to Employment Areas, municipalities must ensure there is an appropriate transition between Employment Areas and sensitive uses like residential uses where necessary. This acknowledges that the delineation of the Employment Area does not necessarily protect uses on the edge of the Employment Area which may require separation from sensitive uses.
- While the P.P.S., 2024 requires an appropriate separation between Employment Area uses and sensitive uses, it also provides the opportunity for manufacturing, small-scale warehousing, and other industrial uses to be accommodated outside of Employment Areas where there are no adverse effects to being located near a sensitive use. It notes that, if there is an opportunity, these uses are to be encouraged in strategic growth areas and other mixed-use areas where frequent transit service is available.^[26]

^[23] Provincial Planning Statement, 2024, policy 2.8.2.3, p. 14.

^[24] Ibid., policy 2.8.2.5, p. 15.

^[25] Ibid., policy 2.8.1.3, p. 13.

^[26] Ibid., policy 2.8.1.2, p. 13.



Planning for Growth in Rural Areas

- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 indicates that rural settlement areas shall be the focus of growth and development in the Rural Area and their vitality and regeneration shall be promoted.^[27] Furthermore, when directing development in rural settlement areas, municipalities are to give consideration to locally appropriate rural characteristics, the scale of the development, and the provision of appropriate service levels.^[28]

Change in Planning Responsibilities

Under Bill 185, the Region of Halton, the Region of Peel, and the Region of York have become “upper-tier municipalities without planning responsibilities” as of July 1, 2024. The County of Simcoe, the Region of Durham, the Region of Niagara, and the Region of Waterloo will become “upper-tier municipalities without planning responsibilities” at a future date to be named by proclamation of the Lieutenant Governor. It is anticipated that there will continue to be a strong need for impacted upper-tier municipalities, including Simcoe County, to address regional growth management coordination efforts (e.g., coordination of local municipal growth forecasts, assessment of regional infrastructure needs, and review of cross-jurisdictional issues), working with their area municipalities. Once the change in planning responsibilities occurs, it is important to note that Simcoe County’s O.P. would no longer be maintained by the County, but rather become part of the lower-tier municipal O.P.s.

On November 5, 2024, the Province introduced proposed amendments to Ontario Regulation 525/97 to Exempt Certain Official Plan Matters from Approval under the *Planning Act*. The proposed amendments include the intention of the province to set a proclamation date for Waterloo Region and Durham Region to become upper-tier municipalities without planning responsibilities on January 1, 2025, while a date of March 31, 2025 has been set for Niagara Region. The comment period for the proposed amendments is set for December 5, 2024. It is noted that proposed exemptions for “other municipalities impacted by Bill 23, such as the lower-tier municipalities in Simcoe County, would be subject to further notice and consultation and a separate regulatory amendment, coinciding with future government decisions related to the date of

^[27] Provincial Planning Statement, 2024, policy 2.5.2, p. 11.

^[28] Ibid., policy 2.5.3, p. 11.



proclamation of the Bill 23 changes that will remove planning responsibilities from the upper-tier municipality.” [29]

2.2 Simcoe County Official Plan Amendment 7

As part of the Region's O.P. review process, the County undertook a G.M.S. to accommodate population, housing, and employment growth to 2051 in accordance with provincial planning requirements. Simcoe County Official Plan Amendment 7 (S.C.O.P.A. #7) is the first phase of the County's G.M.S. This process, referred to as the County of Simcoe M.C.R., provides a comprehensive examination of the long-term growth outlook for the County of Simcoe to the year 2051. The long-term growth outlook explores various forward-looking assumptions regarding residential intensification and greenfield density by Area Municipality within the context of an evolving provincial planning policy framework. Furthermore, it also determines the amount of urban land required to accommodate the growth outlook using an approach that divides the County into a Southern Regional Market Area and a Northern Regional Market Area. About 63% of all population growth in the County is forecast to occur in the Southern Regional Market Area, mainly in the Towns of Innisfil and Bradford West Gwillimbury, and in the Townships of Essa and New Tecumseth where significant growth is already taking place. As of November 2024, S.C.O.P.A. #7 is still under review by the Province.^[30]

Based on S.C.O.P.A. #7, the Town of Bradford West Gwillimbury is anticipated to reach a population of approximately 83,500 and 30,900 jobs by 2051. The population and employment growth allocations by area municipality are provided for the Northern Regional Market Area, the Southern Regional Market Area, and the Town of Bradford West Gwillimbury, as shown in Figure 1.

^[29] Ontario's Regulatory Registry, Proposed Amendments to Ontario Regulation 525/97 to Exempt Certain Official Plan Matters from Approval under the *Planning Act*, 24-MMAH022, posted November 5, 2024.

^[30] Based on Ontario Environmental Registry 09-6113.



Figure 1
Simcoe County
S.C.O.P.A. #7 – Population and Employment Distribution, 2051

Simcoe County by Area	Population, 2051	Employment, 2051
Northern Regional Market Area	259,800	108,620
Southern Regional Market Area	295,220	89,380
Simcoe County	555,000	198,000
Southern Regional Market Area by Area	-	-
Town of Bradford West Gwillimbury	83,470	30,900
Rest of Southern Regional Market Area	211,750	77,720
Southern Regional Market Area	295,220	108,620

Source: Derived from S.C.O.P.A. #7 and summarized by Watson & Associates Economists Ltd.

3. Demographic, Economic and Socio-Economic Profile and Assessment of Growth Drivers

3.1 Overview of Macro-Economic Trends

3.1.1 Global Economic Outlook

In its latest World Economic Outlook, the International Monetary Fund (I.M.F.) is forecasting global economic growth will remain relatively stable from 3.3% in 2023 to 3.2% in 2024 and 2025. For advanced economies, the projected economic growth of 1.8% in 2024 is slightly higher than the I.M.F.'s forecast of 1.5% from its January 2024 projections. Looking forward, the outlook has slightly improved from I.M.F.'s January 2024 projections, with forecast growth of 1.8% in 2024 and 1.8% in 2025. Forecast economic growth for advanced economies, however, is little over half what was achieved in 2022, with 90% of advanced economies projected to experience a sharp slowdown due to higher unemployment. Growth prospects for emerging markets and developing economies are much more varied, but overall have strengthened from the I.M.F.'s January 2024 outlook and are noticeably stronger relative to advanced economies with economic growth projections of 4.2% in 2024 and in 2025.^[31]

^[31] International Monetary Fund, World Economic Outlook, October 2024: Policy Pivot Rising Threats.



Within the United States (U.S.), real gross domestic product (G.D.P.) grew by 2.9% in 2023; and in 2024 U.S. economic growth is projected to remain relatively stable at 2.8% before decreasing to 2.2% in 2025. This outlook is due to several factors, including high household debt, high interest rates, a tightening in financial conditions, and a slowdown in global trade. These trends in global economic conditions are important to monitor, particularly in the U.S., as they have direct influence on macro-economic conditions in Canada.

3.1.2 Ontario Population Growth Outlook within the Canadian Context

Canada's population is experiencing significant growth. In 2023, the population increased by 3.2%, adding 1,271,000 individuals. With population growth outpacing output G.D.P. growth, the G.D.P. per capita has trended lower and is now well below pre-pandemic levels.^[32] The challenges facing growth in the G.D.P. per capita in Canada include labour productivity and a rising unemployment rate for recent immigrants which increased from 9.5% to 12.6% over the past five years.^[33]

The most recent 2024 M.O.F. projection has decreased the growth outlook for Ontario to 20.9 million by 2046, largely driven by the recent federal government announcement to reduce the percentage of non-permanent residents (N.P.R.) from 7.3% of the national population to 5.0%.^{[34],[35]} Since the release of the 2024 M.O.F. projections, the federal government announced an additional reduction in the number of new permanent residents it will accept, lowering the 2025 and 2026 targets of 500,000 to 395,000 in 2025, 380,000 in 2026, and 365,000 in 2027. These changes will likely have a further downward impact on future growth.^[36] It is our opinion that the 2024 M.O.F. projections

^[32] Statistics Canada, Economic and Social Reports, *Canada's Gross Domestic Product Per Capita Perspectives on the Return to the Trend* report by Carter McCormack and Weimin Wang, April 24, 2024.

^[33] TD Economic Reports, Canadian Employment (July 2024), *Canada's job market softens further in July*, published August 9, 2024.

^[34] N.P.R. share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents.

^[35] N.P.R. national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.

^[36] Government of Canada News Release, October 24, 2024.

<https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/government-of-canada-reduces-immigration.html>



for Ontario are slightly ambitious with an annual growth rate of 1.3% between 2021 and 2051, which translates to an annual population increase of 242,600 people.

Comparatively, the level of annual population growth forecast for Ontario under the 2023 M.O.F. forecast is 65% higher than the level of population growth achieved between 2001 to 2021.

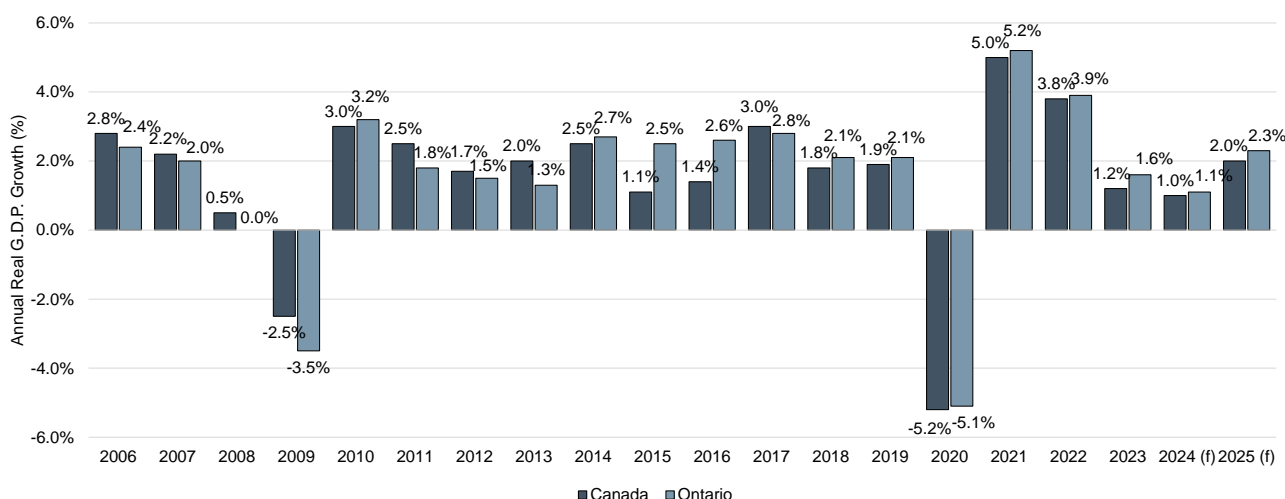
Similar to the broader Canadian economy, the economic base of Ontario, as measured by G.D.P. output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector over the past several decades. This shift has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated prior to and following the 2008/2009 global economic downturn. It is noted, however, that these G.D.P. declines in the manufacturing sector have started to show signs of stabilization, both prior to the coronavirus disease (COVID-19) pandemic and through the more recent economic recovery.

As illustrated in Figure 2, the Ontario economy contracted by 5.1% in 2020 before rebounding by 4.6% in 2021. BMO Capital Markets has forecast that the Ontario economy will continue to soften over 2024, growing by 1.0%, while the overall Canadian economy is expected to strengthen to an average annual G.D.P. rate of 2.0% in 2025. Economic growth in Ontario is forecast to increase at a slightly higher rate than the overall Canadian economy.^[37]

^[37] BMO Capital Markets Economics, Provincial Economic Outlook, June 7, 2024.



Figure 2
Province of Ontario and Canada
Annual Real Gross Domestic Product (G.D.P.) Growth, Historical (2006 to 2023),
and Forecast (2024 to 2025)



Note: 2021 (Ontario), 2024, and 2025 are forecast by BMO Capital Markets Economics.

Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, June 7, 2024, by Watson & Associates Economists Ltd.

3.2 Assessment of Regional Growth Drivers and Review of Growth Forecast within a Provincial and Regional Context

3.2.1 Planning for an Evolving Economy

Continued structural changes in the global economy and technological advancements will require municipalities to be increasingly responsive and adaptive to changing industry needs and disruptive economic forces, which have been accelerated by the COVID-19 pandemic. There are a number of key industry and labour force trends that are expected to influence growth and development patterns in the Greater Golden Horseshoe (G.G.H.) and the Town of Bradford West Gwillimbury over the coming decades. These include, but are not limited to, the following:

- Continued disruption of “bricks and mortar” retail, driven by changes in consumer behavior through e-commerce;



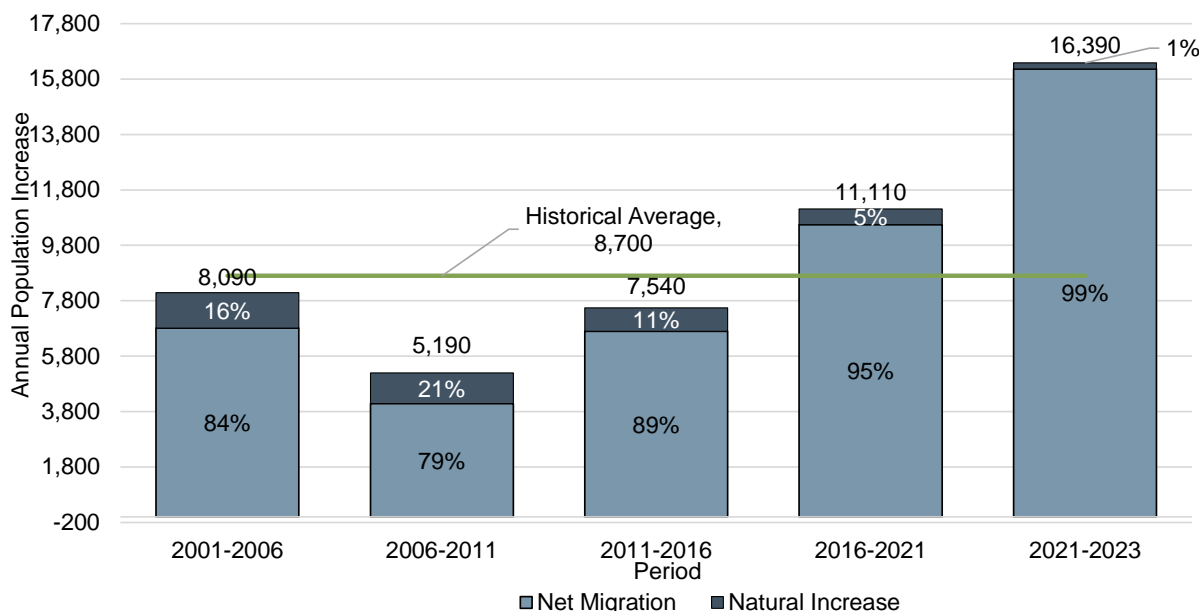
- Economic growth related to the logistics sector, generated from increased demand in e-commerce and the requirements for regional fulfillment centres to serve the growing regional population base in the G.G.H.;
- Continued economic disruption in technology and advanced manufacturing sectors associated with the rise of artificial intelligence;
- Growing opportunities within the Green Technology sector as the Province continues to transition towards the clean energy economy; and
- Increased opportunities related to work at home, hybrid work at home/at office work models, distributed work/learning largely driven by technological innovation, and improvements to regional telecommunications.

3.2.2 Simcoe County Census Division Historical Components of Population Growth, 2001 to 2023

Population growth comprises two key components: natural increase (i.e., births less deaths) and net migration. Figure 4 summarizes historical trends related to net migration and natural increase for the Simcoe Area Census Division (C.D.), which includes the City of Barrie and the City of Orillia. As shown, population change is, and will continue to be, heavily influenced by trends in net migration. For the Simcoe Area C.D., the historical average increase over the 2001 to 2023 period is approximately 8,700 people annually, as summarized in Figure 3. From 2001 to 2021, the County of Simcoe C.D. increased by an average of approximately 8,000 people per year. Since 2021, the County of Simcoe C.D. has experienced a significant increase in population, primarily fueled by in-migration from other areas within the Province. Recent growth has averaged around 16,400 individuals annually, totalling approximately 32,800 over the last two years. While in-migration from other provincial areas has been a key contributor to Simcoe County's population increase, international immigration has also become an increasingly larger component of Simcoe's population growth.



Figure 3
Simcoe Area Census Division (includes the City of Barrie and City of Orillia)
Components of Population Growth, 2001 to 2023



Note: Figures have been rounded. Figures are not adjusted for the residual deviation.

Source: Statistics Canada Table 17-10-0153-01, Components of Population Change by Census Division, 2016 boundaries, by Watson & Associates Economists Ltd.

3.2.3 Regional Labour Force Growth Trends

Figure 4 summarizes total labour force and unemployment rate trends for the Toronto Census Metropolitan Area (C.M.A.). Labour force data is not available for the Town of Bradford West Gwillimbury, but it is captured in the broader Toronto C.M.A. A key driver of this long-term population and employment growth potential is the Town's geographic location within the G.G.H., in particular its proximity to the Greater Toronto and Hamilton Area (G.T.H.A.). The Town of Bradford West Gwillimbury is located at the northern boundary of the Toronto C.M.A. To the north of Bradford West Gwillimbury's municipal boundary lies the Barrie C.M.A. This geographic location enables Bradford West Gwillimbury to attract labour from both the Barrie and Toronto C.M.A.s. Due to the larger scale of the Toronto C.M.A. in relation to the Barrie C.M.A., however, it exerts a greater influence on Bradford West Gwillimbury, especially for out-commuting (i.e., residents commuting to other markets in the Toronto C.M.A.). This dynamic makes Bradford West Gwillimbury unique within Simcoe County, especially given its access to Highway 400 and proximity to G.T.H.A. markets. Key observations of the Toronto C.M.A. include the following:

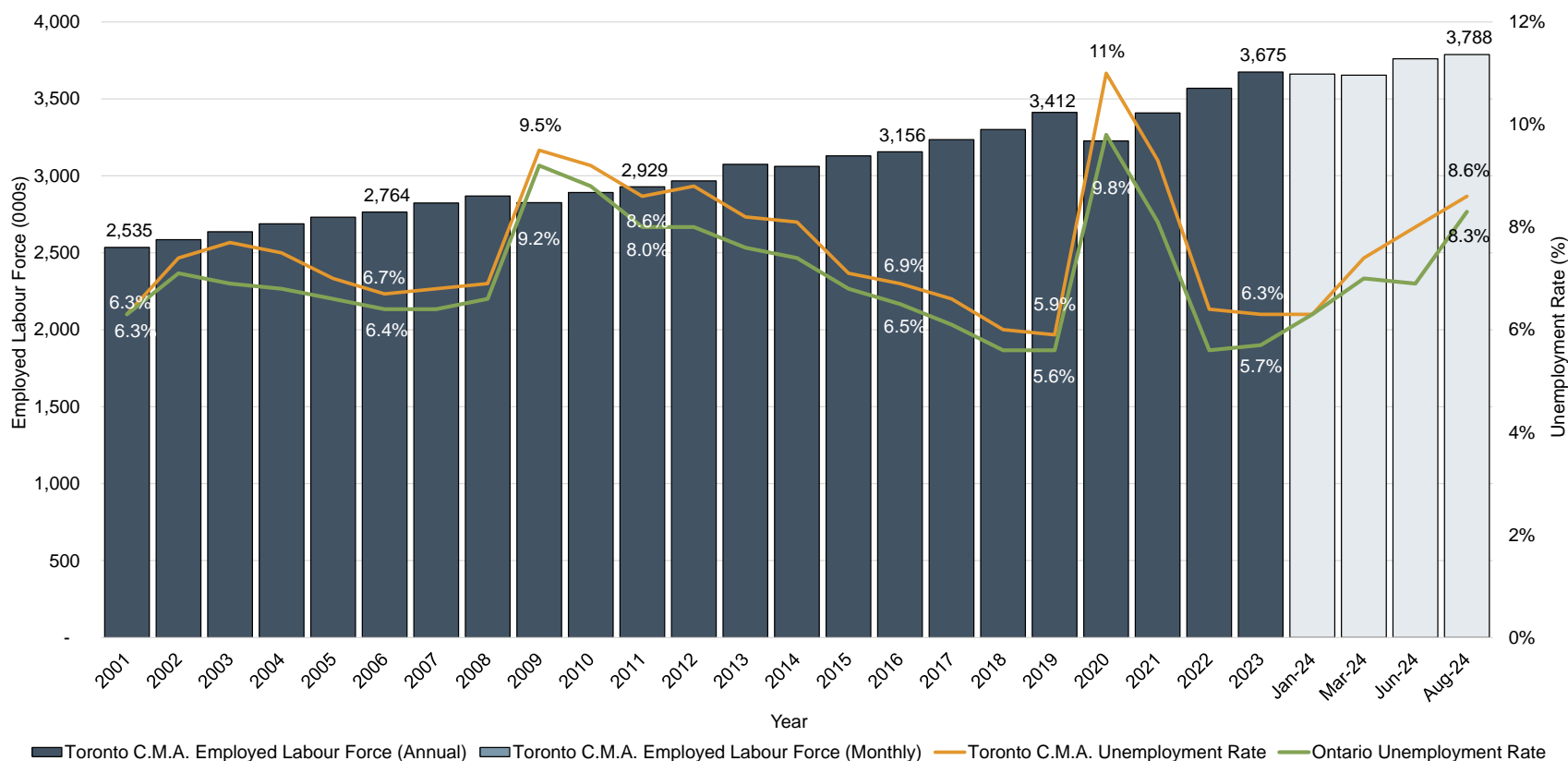


- Since 2011, the Toronto C.M.A. economy has experienced steady labour force growth and a declining unemployment rate leading up to the COVID-19 pandemic in early 2020.
- Following the economic recovery from the pandemic lockdowns in 2020 and 2021, the labour force for the Toronto C.M.A. steadily recovered, reaching new record highs in 2024.
- The pace of labour force growth across the Toronto C.M.A. has slowed since and the unemployment rate has steadily increased since June 2023 following measures by the Bank of Canada in early 2022 to tighten monetary conditions.^[38]
- Accordingly, the Toronto C.M.A. real-estate market, including the Town of Bradford West Gwillimbury, has softened since 2023 relative to trends experienced during the height of the pandemic.
- Looking forward, the long-term economic outlook for the Toronto C.M.A. is very positive. Real-estate market conditions, however, are anticipated to remain relatively weaker in the near-term in response to slowing regional, provincial, and national economic conditions combined with relatively higher mortgage lending rates when compared to the peak pandemic period.

^[38] Since March 2022, the Canadian prime interest rate increased from 2.45% to a peak of 7.2% in 2024. The Canadian prime interest is now 6.45%. In addition, the Bank of Canada introduced quantitative tightening measures in 2022, a process whereby the Bank of Canada reduces the supply of money circulating in the economy by selling its accumulated assets, mainly bonds.



Figure 4
Toronto Census Metropolitan Area (C.M.A.)
Labour Force Trends, 2001 to Year-To-Date 2024



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

Source: Toronto C.M.A. employed labour force and unemployment rate from Statistics Canada Table 14-10-378-01, Table 14-10-0385-01, and Table 14-10-0096-01. Province of Ontario unemployment rate from Statistics Canada Table 14-10-0327-01. Derived by Watson & Associates Economists Ltd.



3.3 Town of Bradford West Gwillimbury Demographic, Economic, and Local Development Trends

3.3.1 Key Employment Sectors in the Town of Bradford West Gwillimbury

The Town of Bradford West Gwillimbury offers a diverse range of economic and employment opportunities across various sectors. The Town is home to some of the County's largest industrial businesses which are key anchors for the Employment Area base in the Town. Moreover, the commercial and institutional employment base in the Bradford Urban Area not only provides job opportunities, but also offers a range of goods and services that serve the daily needs of residents, contributing towards the quality of life for residents. Like the rest of Simcoe County, tourism is a vibrant and growing industry, providing unique employment opportunities both within the rural and urban settings.

With a strong agricultural heritage, the Town boasts a thriving agricultural sector providing employment opportunities in farming and agri-food processing industries. The Holland Marsh, situated along the eastern boundary of the Town, covers 2,900 hectares and provides some of the highest quality and fertile agricultural land in Ontario. The agricultural output of the Holland Marsh totals more than \$50 million annually, encompassing a diverse array of vegetable products.^[39]

As illustrated in Figure 5, manufacturing is the largest employment sector in the Town of Bradford West Gwillimbury, representing just over 2,500 jobs, or approximately 22% of the employment base in the Town.^[40] The manufacturing sector provides significant employment opportunities and contributes to the local economy's resilience and stability. Key manufacturing sub-sectors identified by the Town's Office of Economic Development include transportation equipment manufacturing, fabricated metal products manufacturing, machinery manufacturing, and non-metallic mineral product manufacturing companies.^[41]

^[39] Based on Lightcast OMAFRA employment data.

^[40] Holland Marsh Drainage System, Joint Municipal Service Board, website – <https://www.hollandmarsh.org/Home/About>

^[41] Town of Bradford West Gwillimbury Economic Development Website – <https://www.gotobwg.ca/community-profile/>, accessed October 31, 2024.



Figure 5
Town of Bradford West Gwillimbury
Employment Base, 2024



Source: Derived from Lightcast OMAFRA employment data by Watson & Associates Economists Ltd.

3.3.2 *Bradford Bypass*

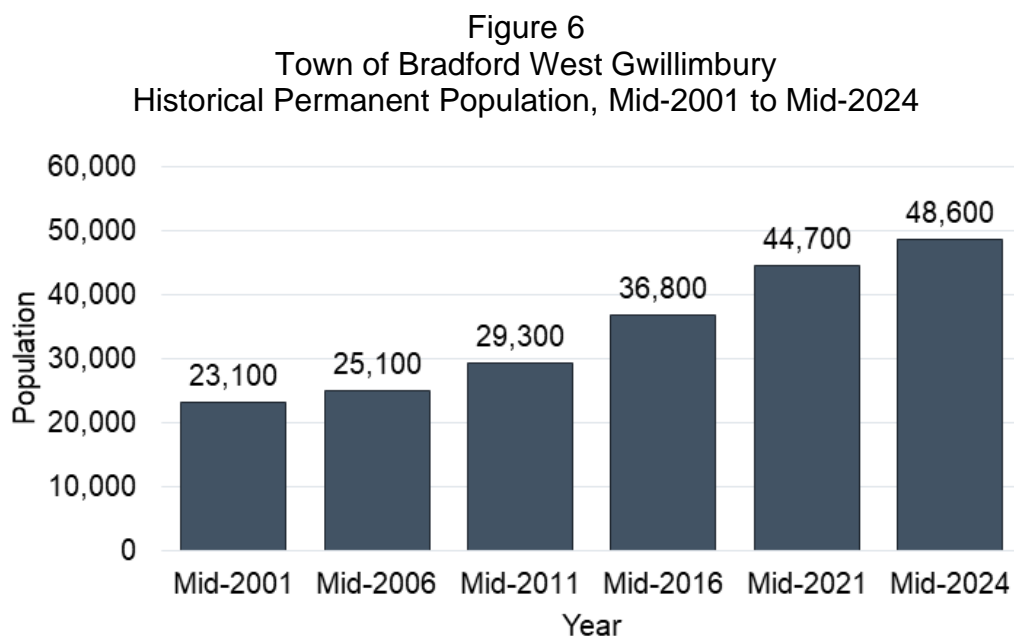
A key opportunity for success in attracting employers and labour force growth in the Town is the Bradford Bypass. The Bradford Bypass, part of the Highway 400–404 Connecting Link, will establish an east-west route linking Highway 400 in Bradford West Gwillimbury to Highway 404 in East Gwillimbury. The Bradford Bypass has proposed interchanges at the following locations: Highway 400 Freeway to Freeway Interchange, 10th Sideroad (County Road 54), County Road 4 (Yonge Street), Bathurst Street, 2nd Concession Road, Leslie Street and Highway 404 Freeway to Freeway Interchange. This significant infrastructure initiative is currently in the planning phase and aims to alleviate congestion on local highways while also fostering economic development opportunities to enhance the growth of Employment Area lands through improved access to 400-series highways.



3.3.3 Town of Bradford West Gwillimbury Population Trends, 2001 to 2024

Over the past several decades, population growth within the Town of Bradford West Gwillimbury has been largely driven by net migration of working-age adults from other areas within the Province, in particular large urban municipalities within the G.T.H.A. Rising housing costs in the G.T.H.A. are expected to continue to drive growth outward into the Outer Ring of the G.G.H. (i.e., G.G.H. municipalities located outside the G.T.H.A.). This trend has been increasing with respect to families moving from the G.T.H.A. who are often seeking more affordable grade-related housing options in municipalities located in Simcoe County and other regions within the G.G.H Outer Ring and Southern Ontario.

Figure 6 summarizes historical permanent population trends for the Town of Bradford West Gwillimbury over the 2001 to 2024 period. During this period, the Town's population base has grown from 23,100 in 2001 to 48,600 in 2024, an increase of 25,500 people. Since 2016, the population of Bradford West Gwillimbury has grown at an annual rate of 3.5%. Comparatively, the population over the 2001 to 2016 period grew at a slightly lower annual rate of 3.2%.



Note: All figures include the population undercount, estimated at 4%.

Source: Statistics Canada Census, and 2024 is an estimate by Watson & Associates Economists Ltd. based on a review of residential building permit activity.



Demographic trends strongly influence both housing need and form. Across Ontario the population is getting older on average, due to the aging of the Baby Boomers.^[42] The first wave of this demographic group turned 75 years of age in 2021. Figure 7 summarizes historical trends in permanent population structure by major age group over the 2001 to 2021 period for the Town of Bradford West Gwillimbury. As illustrated, the share of population in the 75+ age cohort steadily increased from 3% in 2001 to 5% in 2021. This coincided with a similar increase in the 65 to 74 age cohort, growing from 4% in 2001 to an allocation of 8% in 2021. Furthermore, the 45 to 64 age cohort has increased from 21% in 2001 to an allocation of 26% in 2021.

In contrast to the above population age groups, the population share for the 0-19 age group declined from 31% in 2001 to 27% in 2021. Similarly, the adult population age groups under 45 years (20 to 34 and 35 to 44) have steadily declined in population share from 40% in 2001 to 34% in 2021.

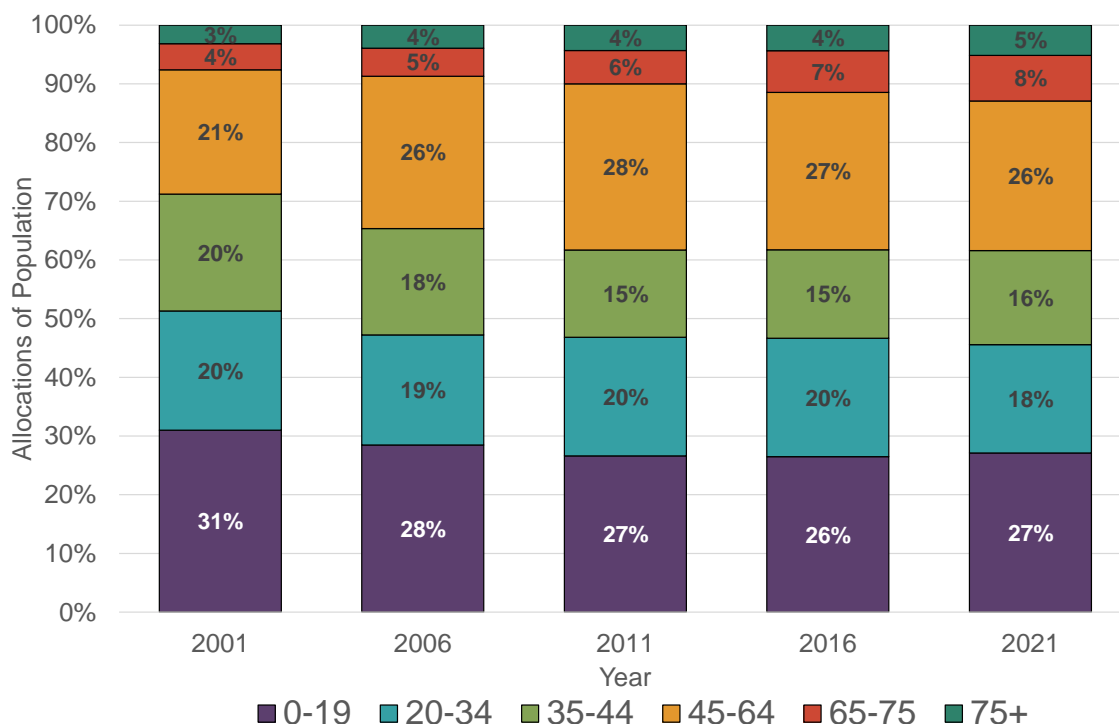
It is important to recognize that while the Town's population base is growing, it is also getting older. Between 2021 and 2051, the 75+ age group is forecast to represent the fastest growing population age group within the Town. With an aging population, the Town will be more reliant on net migration as a source of population as opposed to natural increase (i.e., net population growth from births less deaths). With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density housing forms, including seniors' housing and affordable housing options. The aging of the local and regional population base is also anticipated to place downward pressure on labour force participation rates and economic growth for the Town, the County, and the Province.^[43]

^[42] Baby Boomers are generally defined as people born between 1946 and 1964.

^[43] The participation rate is the number of labour force participants expressed as a percentage of the population 15 years of age and over.



Figure 7
Town of Bradford West Gwillimbury
Historical Permanent Population by Major Age Group, 2001 to 2021



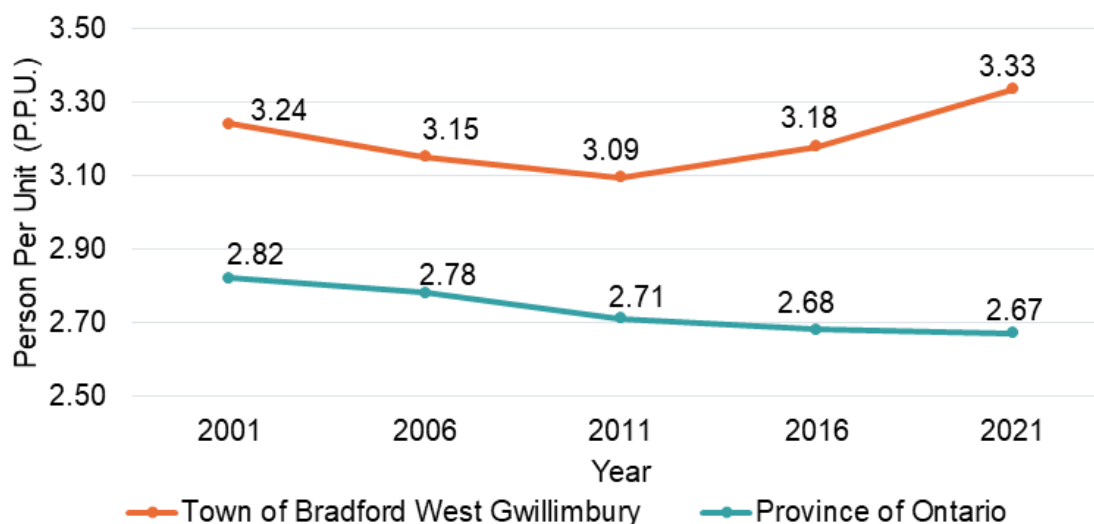
Note: Population does not include net Census undercount at approximately 4%.
Source: Population forecast by age derived from 2001 to 2021 Statistics Canada Census by Watson & Associates Economists Ltd.

3.3.4 Persons Per Housing Unit, 2006 to 2021

Figure 8 summarizes the historical persons per unit (P.P.U.) average for the Town of Bradford West Gwillimbury from 2001 to 2021 in accordance with Statistics Canada Census data. For comparative purposes, P.P.U. data for the Province of Ontario has also been provided. As shown, the average P.P.U. for Bradford West Gwillimbury has increased since 2011, marking a reversal from the decline observed from 2001 to 2011. Provincially, the rate of P.P.U. decline moderated over the past two recent Census periods; however, average P.P.U. levels are still anticipated to fall further over the next three decades, largely driven by the aging of population. In 2021, the average P.P.U. for Bradford West Gwillimbury was 3.33, which is above the provincial average of 2.67.



Figure 8
Town of Bradford West Gwillimbury
Historical Persons Per Unit, 2001 to 2021



Note: Population includes net Census undercount at approximately 4%.

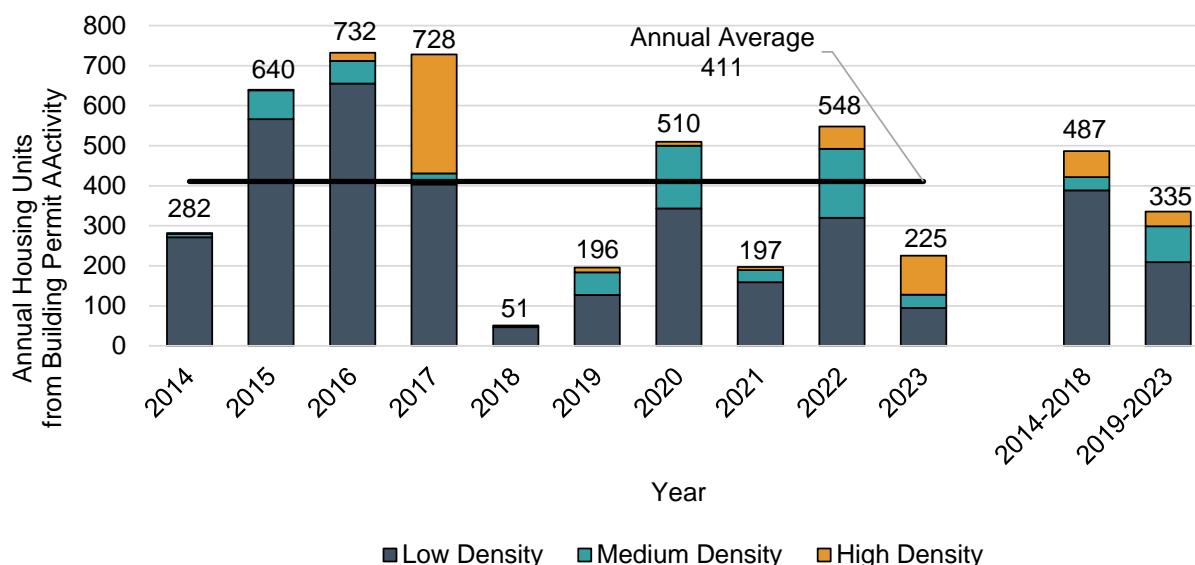
Source: Historical data from Statistics Canada and Statistics Canada Demography Division, 2001 to 2021, by Watson & Associates Economists Ltd.

3.3.5 Historical Residential Building Permit Activity, 2014 to 2023

Figure 9 summarizes trends in historical residential building permit activity (new units only) for the Town of Bradford West Gwillimbury during the 2014 to 2023 period. Over the 2014 to 2023 period, the Town of Bradford West Gwillimbury issued building permits for the construction of 411 new housing units annually. The largest increase in residential building permit activity was over the 2015 to 2017 period, averaging 700 new housing units annually. Since 2019, the Town has averaged 335 building permits for new housing units annually.



Figure 9
Town of Bradford West Gwillimbury
Residential Building Permit Activity – New Units Created, 2014 to 2023



Notes:

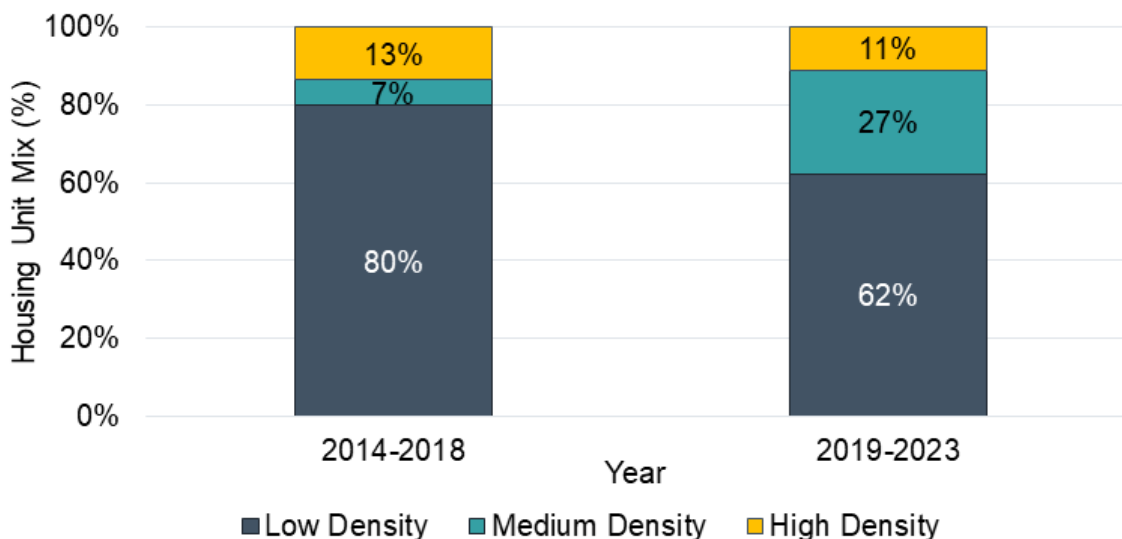
- Low density includes single and semi-detached houses.
- Medium density includes townhouses and apartments in duplexes.
- High density includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

Source: Building permits provided by the Town of Bradford West Gwillimbury, derived by Watson & Associates Economists Ltd.

Figure 10 illustrates historical household growth by structure type based on building permit activity from 2014 to 2023 in the following periods: 2014 to 2018 and 2019 to 2023. As illustrated, while low-density housing (single detached and semi-detached) has been a dominant housing structure type, over the past 10 years the Town has experienced a shift towards medium-density housing. Over the past five years (2019 to 2023), low-density housing has accounted for 62% of the Town's housing activity, compared to 80% over the 2014 to 2018 period. Over the long-term planning horizon, housing demand is anticipated to gradually shift from low-density housing forms to medium- and high-density housing types, largely driven by the aging of the Town's population base and declining housing affordability.



Figure 10
Town of Bradford West Gwillimbury
New Housing Units by Structure Type, 2014 to 2023



Notes:

- Low density includes single and semi-detached houses.
- Medium density includes townhouses and apartments in duplexes.
- High density includes bachelor, 1-bedroom, 2-bedroom+ apartment units.

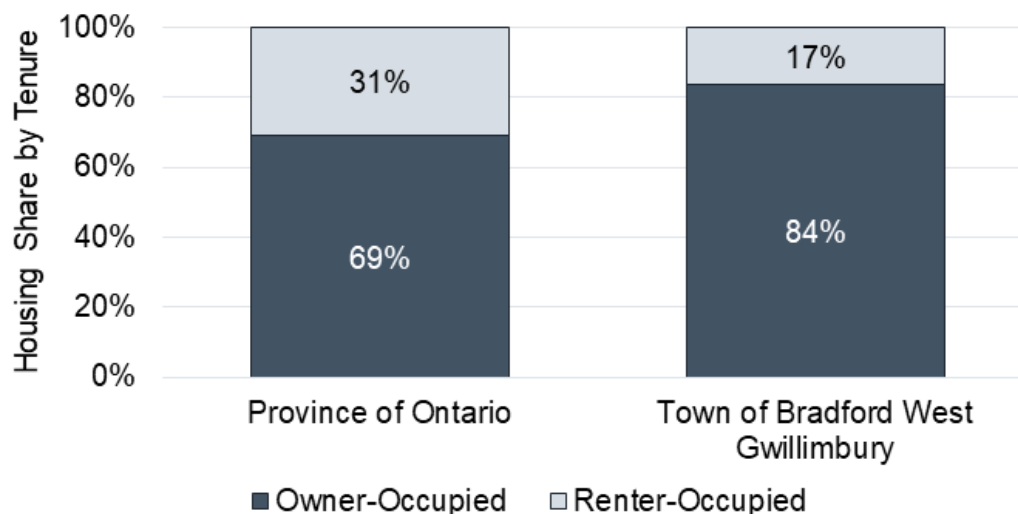
Source: Building permits provided by the Town of Bradford West Gwillimbury, derived by Watson & Associates Economists Ltd.

3.3.6 Housing Tenure Trends

Housing tenure falls under two categories: owner occupied and tenant occupied. Within the Town of Bradford West Gwillimbury, approximately 84% of housing units are owner occupied, with a corresponding 17% of units being tenant occupied. The percentage share of renter-occupied units in the Town is lower than the provincial average (31% of households are renter occupied provincially). Figure 11 illustrates the tenure of both the Town of Bradford West Gwillimbury and the Province of Ontario. Looking forward, demand for rental housing options within the Town is anticipated to increase driven by the declining affordability of ownership housing.



Figure 11
Town of Bradford West Gwillimbury and Province of Ontario
Housing Tenure, 2021



Note: Figures may not add precisely due to rounding.

Source: Data from Statistics Canada 2021 Census, by Watson & Associates Economists Ltd.

4. Review of Simcoe County Official Plan Amendment 7

4.1 Analysis of Simcoe County Forecasts for the Town of Bradford West Gwillimbury to 2051

4.1.1 Population and Housing Growth Forecasts, 2021 to 2051

Over the past 2016 to 2021 period, the Town's population growth rate (3.4%) has been higher than the growth rate of the County (2.2%) and the provincial average (1.4%) over the same period.^[44] The Town of Bradford West Gwillimbury has accommodated 15% of the growth within the County of Simcoe over the past five years. Recognizing the strong growth potential within the Town, Bradford West Gwillimbury is anticipated to

^[44] Based on Statistics Canada Census data. The Statistics Canada population is adjusted to account for the net number of people who are missed (i.e., over-coverage less under-coverage) during enumeration.



accommodate 17% of the population growth within the County of Simcoe to 2051 based on the County's forecast.

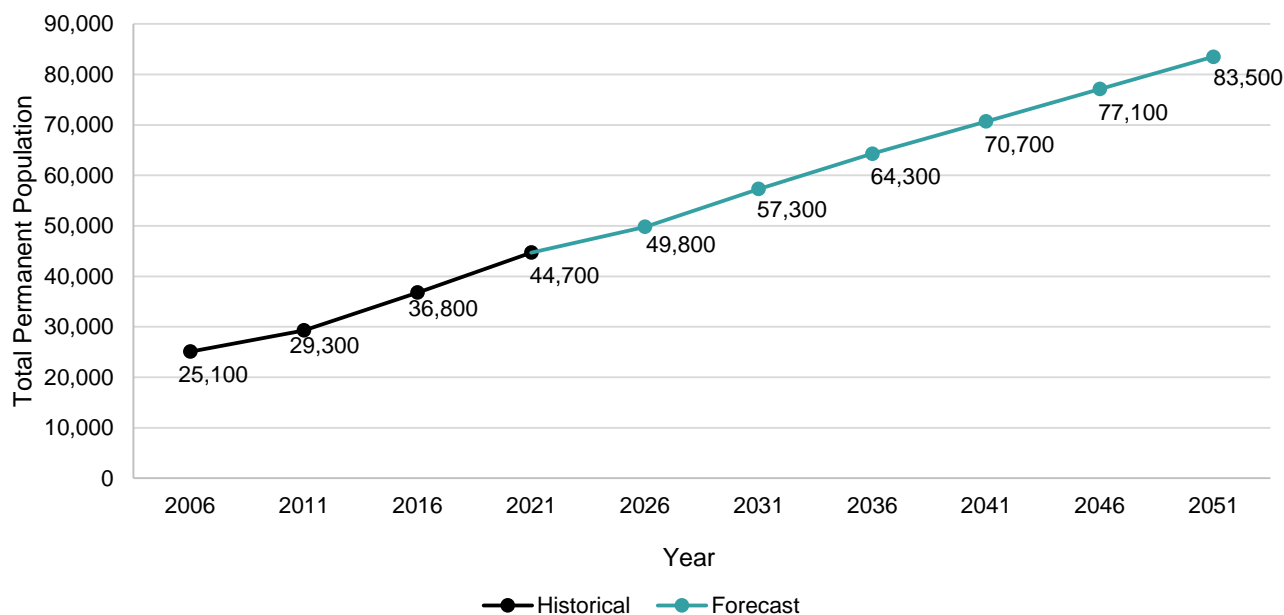
Figure 12 provides a summary of the population and housing forecast for 2051 based on S.C.O.P.A. #7. Watson has reviewed the population, housing, and employment forecasts prepared as part of S.C.O.P.A. #7. As part of this review, relatively minor adjustments have been made to the 2021 population based on a review of the Statistics Canada 2021 Census, which has been upwardly adjusted for the Census undercount at 4%.^[45] In addition, Watson has examined recent development activity through mid-2024 and considered this anticipated development activity to inform the growth forecast review over the short and medium term. It is noted that recent population and housing growth trends in the Town are tracking close to the Simcoe County forecast. The short-term (i.e., 2016 to 2026) population and housing forecast set out in the Simcoe County G.M.S. assumes robust growth for the Town relative to historical growth achieved in recent decades.

Figure 12 summarizes the population forecast to 2051 based on five-year increments for the Town of Bradford West Gwillimbury. By 2051, the Town is forecast to accommodate a population of 83,500, an increase of 38,800 or 1,290 residents annually over the 2021 to 2051 period, representing an annual population growth rate of 2.1%. While the growth rate remains robust, it is slightly lower than the Town's historical average annual population growth rate of 3.4% achieved over the last 20 years.

^[45] Based on Statistics Canada Census data. The Statistics Canada population is adjusted to account for the net number of people who are missed (i.e., over-coverage less under-coverage) during enumeration.



Figure 12
Town of Bradford West Gwillimbury
Long-Term Population Growth Forecast, 2021 to 2051



Note: Population includes net Census undercount.

Source: Historical derived from Statistics Canada Census data, and forecast derived from the Simcoe County Official Plan to 2051 by Watson & Associates Economists Ltd.

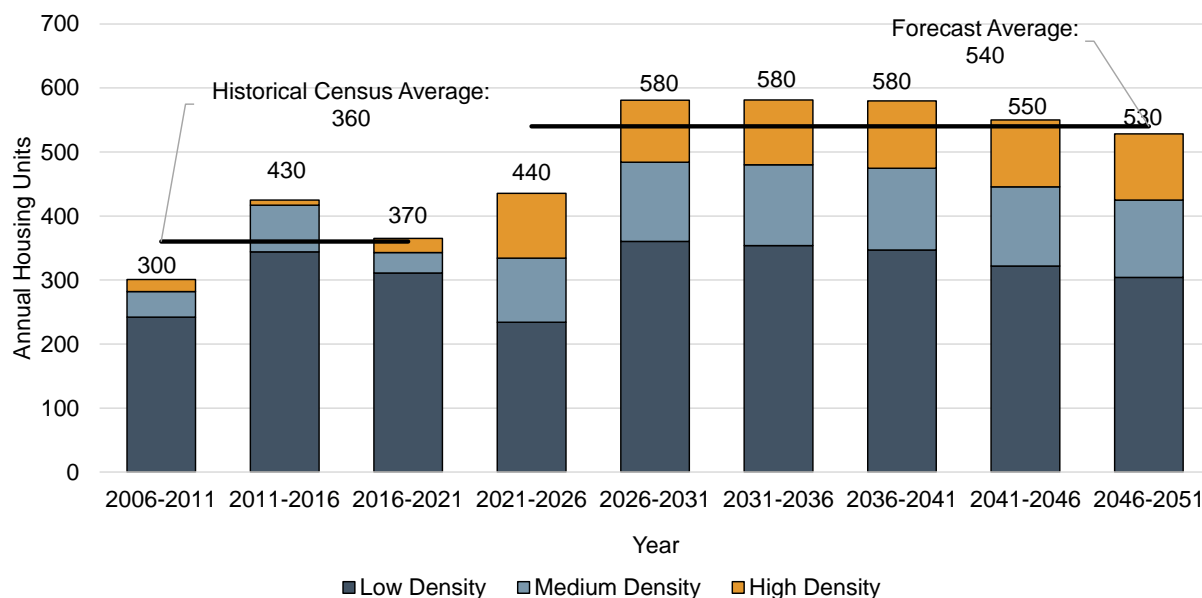
It is important to note that based on a review of the housing forecast prepared by Simcoe County for the Town, Watson has modified the housing forecast by housing type to reflect recent housing development trends and anticipated development in active applications. As a result, the housing forecast by Watson is more oriented towards medium- and high-density housing over the long-term forecast. This change to the forecast housing mix supports the achievement of the Town's intensification target of 42% (as discussed later), which will require more emphasis on medium- and high-density housing units over the forecast horizon. Furthermore, this shift towards more medium- and high-density housing also aligns with anticipated demand towards an increasing share of affordable and attainable housing options within the Town.

As summarized in Figure 13, over the mid-2026 to mid-2031 period, the Town is forecast to add approximately 3,000 housing units over this period, or 580 units annually. Housing growth over the mid-2031 to mid-2041 forecast period is anticipated to remain steady, increasing by approximately 580 units annually. By 2041, annual



housing growth is anticipated to drop slightly reflecting an aging population. Over the 2041 to 2046 period, it is forecast that the Town will accommodate an average of 550 housing units annually, while over the 2046 to 2051 period, an annual average of 530 housing units is forecast.

Figure 13
Town of Bradford West Gwillimbury
Housing Forecast, 2021 to 2051



Notes:

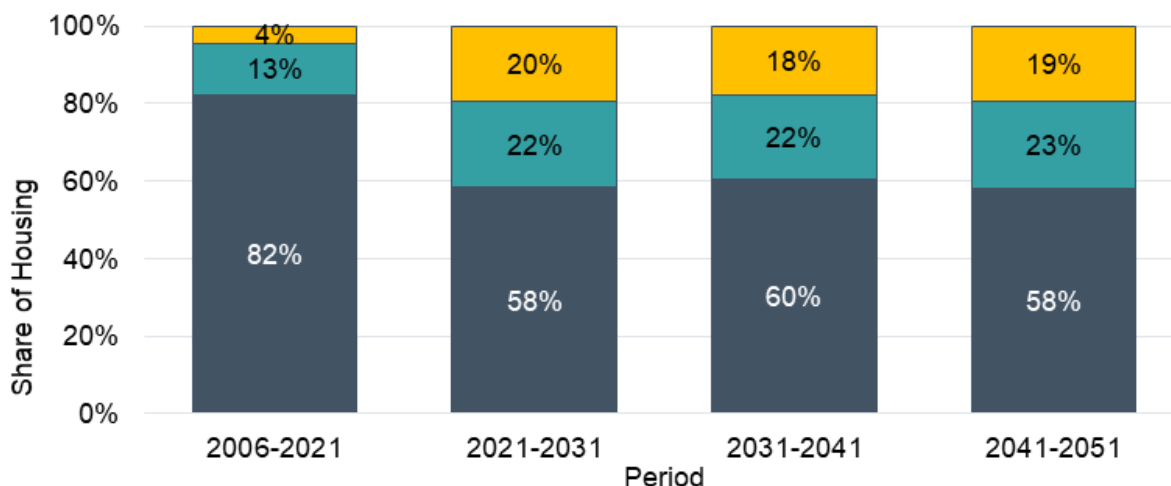
- Low density includes single and semi-detached houses.
- Medium density includes townhouses and apartments in duplexes.
- High density includes bachelor, 1-bedroom, 2-bedroom+ apartment units.
- Figures have been rounded.

Source: Historical derived from Statistics Canada Census data, and forecast based on S.C.O.P.A #7 with adjustments of interim years by Watson & Associates Economists Ltd.

As summarized in Figure 14, over the most recent period, 2021 to 2026, the Town has accommodated 82% low-density housing units, followed by 13% medium-density housing units and 4% high-density housing units. Looking forward, the Town is anticipated to accommodate a higher share of medium- and high-density housing units primarily driven by declining housing affordability and housing demands associated with the Town's growing 65+ population.



Figure 14
Town of Bradford West Gwillimbury
Housing Forecast by Housing Type, 2021 to 2051



Notes:

- Low density includes single and semi-detached houses.
- Medium density includes townhouses and apartments in duplexes.
- High density includes bachelor, 1-bedroom, 2-bedroom+ apartment units.
- Figures have been rounded.

Source: Historical derived from Statistics Canada Census data, and forecast based on S.C.O.P.A #7 with adjustments by Watson & Associates Economists Ltd.

4.1.2 Employment Forecasts, 2024 to 2051

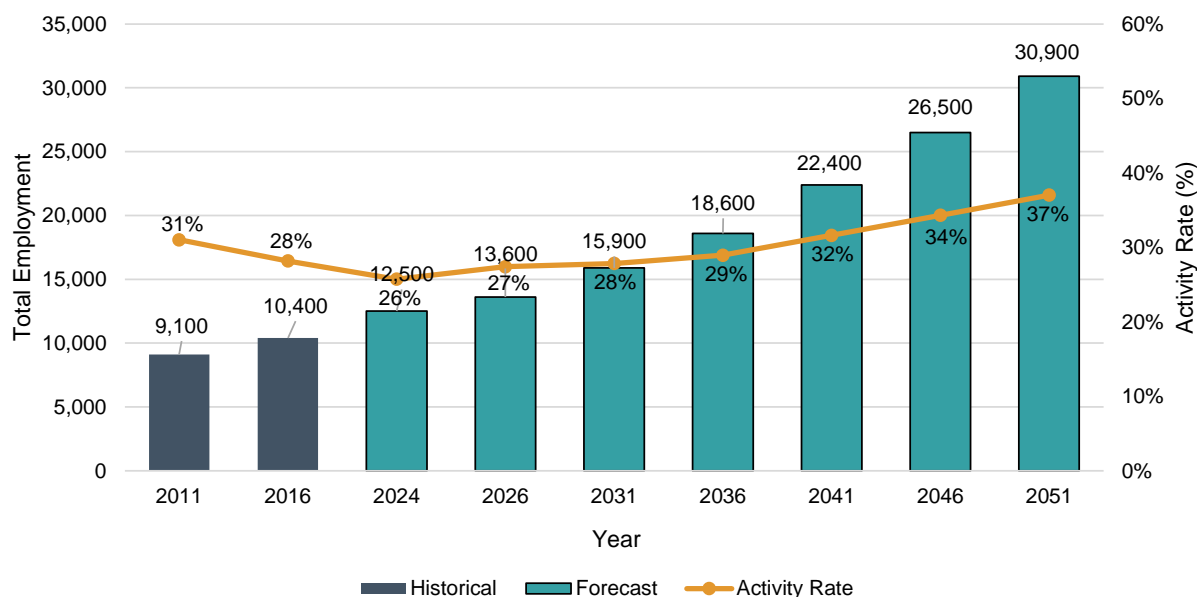
Figure 15 summarizes the Town's employment forecast to 2051 in five-year increments. By 2051, the Town is forecast to accommodate an employment base of 30,900, an increase of 18,400 or approximately 680 jobs annually over the 2024 to 2051 period. As a result, employment growth over that period is anticipated to increase at an annual rate of 3.4%.

A key consideration in planning for complete communities is the ability to accommodate jobs as the community's population grows. An employment activity rate, the ratio of jobs to population, is used to understand the relationship between population growth and employment growth. Over the forecast horizon, the employment activity rate is anticipated to increase from 26% in 2024 to 37% by 2051. The attainment of a higher employment activity rate will depend on the success of the Town to attract and accommodate economic development across a broad spectrum of industries, notably in



Employment Areas. A further review of employment will be carried out in the Employment Strategy Report as part of the Town of Bradford West Gwillimbury G.M.S.

Figure 15
Town of Bradford West Gwillimbury
Employment Forecast, 2024 to 2051

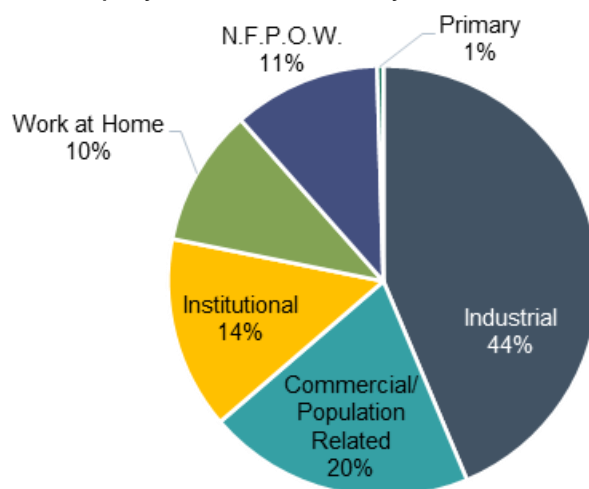


Source: Historical derived from Statistics Canada Census data, and forecast based on S.C.O.P.A #7 with adjustments of interim years by Watson & Associates Economists Ltd.

As summarized in Figure 16, employment growth over the 2024 to 2051 period is anticipated to be accommodated across a range of sectors. As summarized, employment in the industrial sector is anticipated to represent 44% of the Town's employment growth, followed by commercial/population-related employment at 20% and institutional employment at 14%. Work at home and no fixed place of work employment is anticipated to accommodate the remaining 11% of the Town's employment growth. A further review of employment by location, including by Employment Area, Community Area, and Rural Area will be carried out in the Employment Strategy Report as part of the Town of Bradford West Gwillimbury G.M.S.



Figure 16
Town of Bradford West Gwillimbury
Employment Forecast by Sector, 2024 to 2051



Note: N.F.P.O.W. means no fixed place of work.

Source: Forecast based on S.C.O.P.A #7 and estimates of the 2024 employment base by Watson & Associates Economists Ltd.

Further details on the population, housing, and employment growth forecast are provided in Appendix A.

4.2 Key Growth Management Targets

4.2.1 Planning for Intensification

4.2.1.1 What is Intensification?

S.C.O.P.A. #7 considers any residential development within the B.U.A. as intensification. All residential development within the B.U.A. counts towards the County's intensification target, regardless of housing type or form. As previously discussed, a B.U.A. was delineated for all urban settlements as of 2006 as part of the Growth Plan for the Greater Golden Horseshoe, 2006 under the *Places to Growth Act*,



2005.^[46] The B.U.A. was based on the portion of the urban settlement that was primarily developed at that time.

Intensification includes the following opportunities:

- Development on infill sites (i.e., accommodating growth on underutilized sites);
- Redevelopment at a higher density level;
- Vacant lands and the rounding out of existing subdivisions;
- Residential development incorporated on commercial or mixed-use lands;
- Conversion of buildings to other uses (e.g., conversion of a non-residential building for housing); and
- Additional Residential Units on existing residential lots.

A further review of intensification supply opportunities will be carried out as part of the G.M.S. Intensification Analysis Report. The following provides a high-level overview of the residential intensification rate target.

4.2.1.2 Benefits and Considerations in Planning for Intensification

Measured intensification maximizes the use of existing urban infrastructure and services by increasing the density of development in established areas, thereby reducing the potential needs to expand the urban settlement areas outward. Furthermore, intensification builds compact development patterns that can provide a range of housing options that are accessible to amenities and improve climate resilience by building housing that is more energy efficient (multiple dwelling unit structures are generally more energy efficient than single detached housing unit structures).

It is important not to oversimplify the benefits of intensification. Accommodating too much intensification or focusing on growth only through intensification may pose challenges, as the Town may be required to upgrade and replace infrastructure (e.g., bigger water mains and trunk sewers) prior to its identified useful life, which can have significant financial implications. Furthermore, considering the range of demographic groups attracted to the Town (i.e., young adults, families with children, empty nesters, and seniors), Bradford West Gwillimbury is anticipated to need to accommodate a

^[46] Places to Grow. Better Choices. Brighter Future. Built Boundary for the Growth Plan for the Greater Golden Horseshoe, 2006. Ministry of Public Infrastructure Renewal. Ontario. 2008.



variety of housing options by structure type, tenure (i.e., ownership and rental), and location.

To effectively accommodate the forecast housing demand for this area, the Town will need to plan for an appropriate balance of housing options within both its B.U.A. and D.G.A. areas which aligns with anticipated market demand. Accordingly, the Town should plan for intensification that considers a range of factors, including servicing requirements and market demand.

4.2.1.3 Historical Housing Growth Accommodated by Policy Area

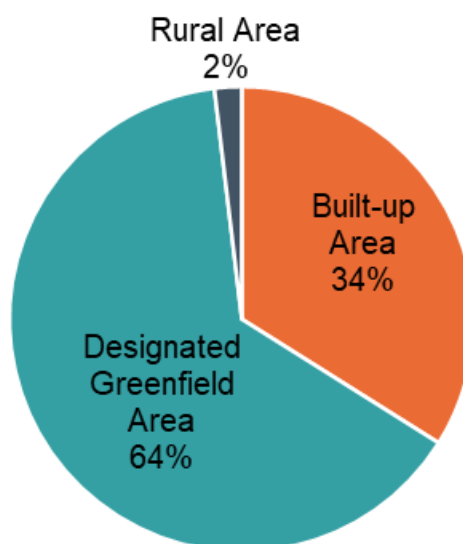
As summarized in Figure 17, over the 2019 to 2023 period, the B.U.A. has accommodated 34% of the new housing unit activity within the Town of Bradford West Gwillimbury, averaging 115 new housing units annually. Low-density housing units have accounted for slightly more than one-third (37%) of the new housing units within the B.U.A., whereas medium-density housing units have represented nearly half (47%) of the new housing units in the B.U.A. High-density housing units have made up 17% of the new housing units within the B.U.A.

Low-density housing development activity in the B.U.A. has included subdivisions completing the final phases of development. This development opportunity within the B.U.A. is not anticipated going forward, given the limited supply of land related to at-grade housing opportunities in the B.U.A.

Over the 2019 to 2023 period, the D.G.A. has accommodated the largest share of new housing unit activity, representing 64% of the Town's new housing activity. Over the forecast horizon, it is anticipated that development activity in the D.G.A. will include more housing development within the Bond Head Settlement Area. Over the 2019 to 2023 period, the Rural Area has accommodated 2% of new housing activity.



Figure 17
Town of Bradford West Gwillimbury
New Housing Unit Activity by Policy (Built-Up Area, Designated
Greenfield Area, and Rural Area), 2019 to 2023



Source: Building permits provided by the Town of Bradford West Gwillimbury, derived by Watson & Associates Economists Ltd.

4.2.1.4 *Anticipated Housing Growth to be Accommodated Through Intensification*

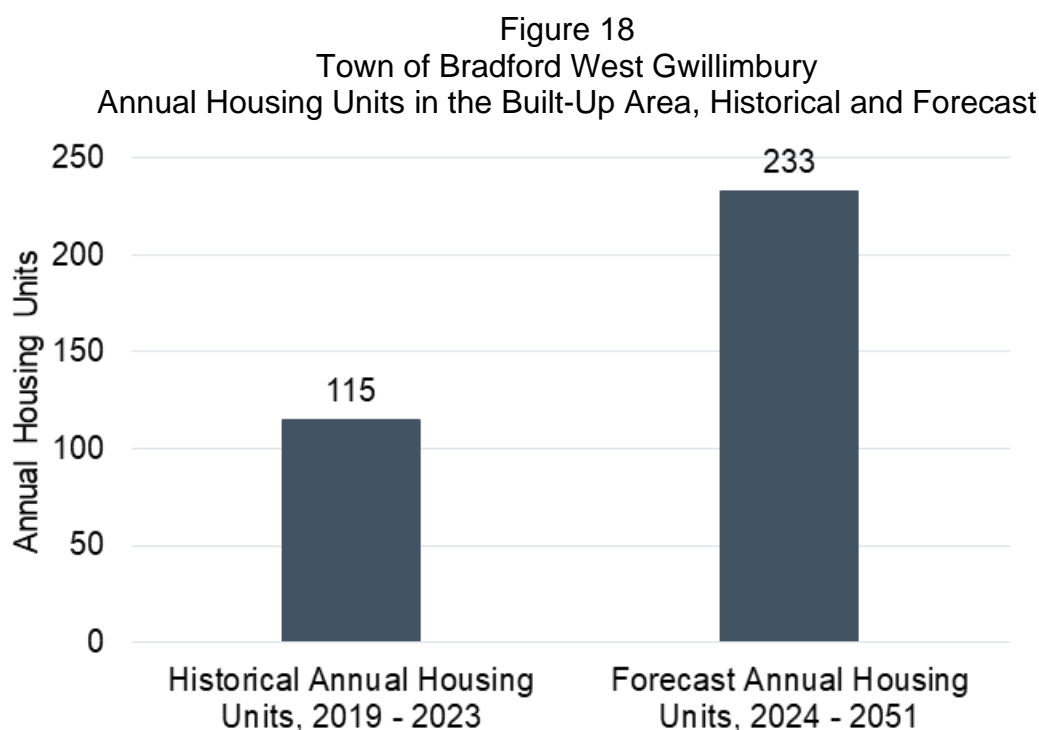
The Town of Bradford West Gwillimbury is planned to accommodate a minimum target of 42% of its housing growth through intensification. As a comparison, the intensification rate target previously established by the County in the 2016 County O.P. was 40%.^[47] The current intensification rate for Bradford West Gwillimbury at 42% is among the highest targets in the County, reflecting opportunities to accommodate a range of housing options in the Bradford Urban Area. To reach a 42% intensification rate by 2051, it is estimated that the Town will need to accommodate over 6,300 housing units in the B.U.A. over the 2024 to 2051 period.^[48] The intensification target would represent a significant increase in the amount of housing growth within the B.U.A. compared to historical levels. Over the 2024 to 2051 period, the intensification rate

^[47] County of Simcoe Growth Forecasts and Land Needs Assessment prepared by Hemson Consulting Ltd., March 31, 2022, p. 58.

^[48] Based on S.C.O.P.A. #7.



would result in an annual average of 233 units in the B.U.A., more than double the historical annual unit average recently achieved (2019 to 2023), as summarized in Figure 18. The Intensification Analysis Report will further explore the opportunities and challenges in achieving the intensification target.



Source: Based on building permits provided by Town of Bradford West Gwillimbury and S.C.O.P.A. #7 derived by Watson & Associates Economists Ltd.

4.2.2 Designated Greenfield Area People and Jobs Density Target

S.C.O.P.A. #7 has identified that the Town of Bradford West Gwillimbury will target 55 people and jobs per hectare in the D.G.A. This would result in an increase in the density currently set at approximately 35 people and jobs per hectare in the Town of Bradford West Gwillimbury O.P.^[49] Achieving a density target of 55 people and jobs per hectare will require the Town accommodates a broader range of housing options in the D.G.A. at higher average densities across all housing forms. Figure 19 provides a

^[49] Town of Bradford West Gwillimbury Official Plan (March 21, 2021), Policy 3.2.1, p. 35.



summary of people and jobs density targets in the surrounding area in comparable municipalities. Key highlights are summarized below.

- For the Town of Bradford West Gwillimbury, an average density target of 55 people and jobs per hectare is above the County of Simcoe average of 51 people and jobs per hectare.^[50] The County has identified that the Town of Innisfil and the Town of New Tecumseth will achieve the same people and jobs density as Bradford West Gwillimbury of 55 people and jobs per hectare.
- Within other areas in the Simcoe area, the City of Barrie is targeting a minimum of 79 people and jobs per hectare, while Orillia is targeting a minimum of 50 people and jobs per hectare.^[51]
- In York Region, the following minimum targets have been established: the Town of East Gwillimbury targets 60 people and jobs per hectare; the Town of Whitchurch-Stouffville targets 55 people and jobs per hectare; and the Town of Georgina targets 35 people and jobs per hectare. The Town of Newmarket targets 40 people and jobs per hectare, which is a low average greenfield density largely due to a limited supply of vacant greenfield lands and density average that is weighted towards already developed greenfield lands.^[52]
- As a further comparison, the Town of Caledon targets a minimum of 68 people and jobs per hectare.^[53]
- Generally, the people and jobs per hectare density target for Bradford West Gwillimbury is in line with comparable municipalities across the G.G.H. The Town should continue to monitor density levels on greenfield lands.

^[50] Based on S.C.O.P.A. #7.

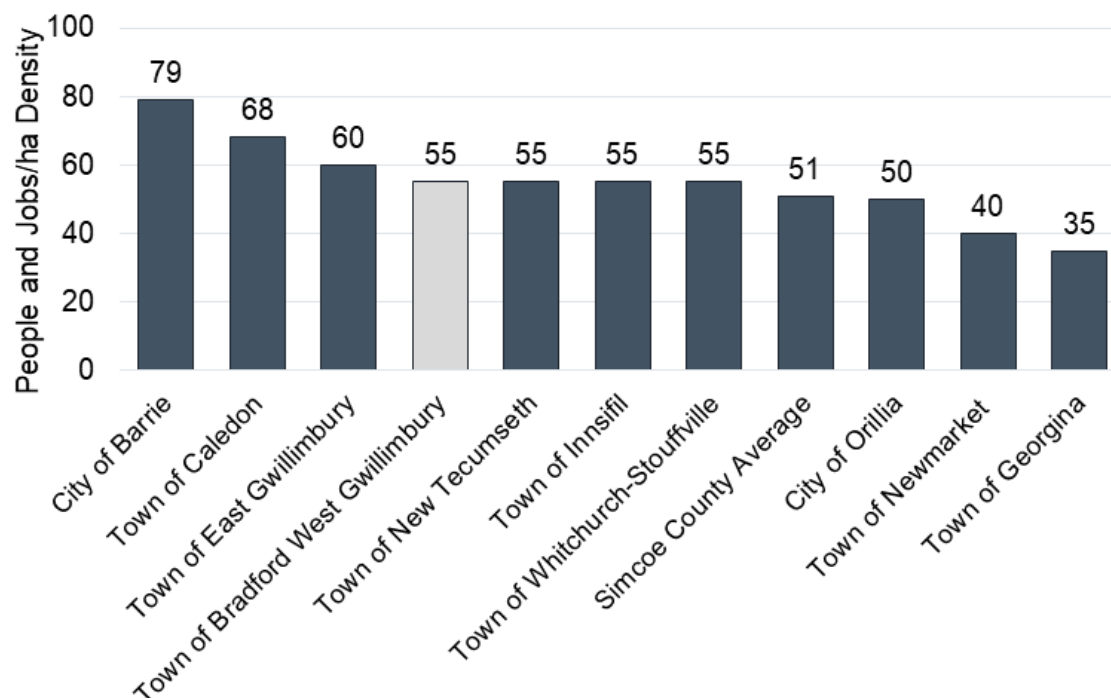
^[51] Based on the City of Barrie Official Plan (approved by Province April 11, 2023) and the City of Orillia Land Needs Assessment prepared by Hemson Consulting Ltd., April 2033.

^[52] Based on the Region of York Official Plan, June 2024.

^[53] Based on the Region of Peel Official Plan, April 2022. Note that the density has been rounded (67.5 people and jobs per hectare is the actual O.P. target).



Figure 19
Town of Bradford West Gwillimbury and Comparable Municipalities
People and Jobs per Hectare Density Targets to 2051



Source: Based on various Official Plans and Municipal Comprehensive Reviews.

4.2.3 Summary of Growth Targets

Figure 20 provides a summary of the growth targets to be considered in planning for growth in the Town of Bradford West Gwillimbury. It is important to note that these targets are considered minimums. Over the planning horizon, the Town should continue to monitor the growth targets summarized in Figure 20. Other factors in monitoring growth should also be explored, including the range of non-residential uses (e.g., commercial, industrial, and institutional) and housing options (e.g., housing by tenure and structure type).



Figure 20
Town of Bradford West Gwillimbury
Growth Targets

Growth Targets	Target
Town Population by 2051	83,500
Town Employment by 2051	30,900
Minimum Intensification Rate – Share of Housing Growth in the Built-Up Area	42%
Minimum Density in Greenfield Areas	55 people and jobs per hectare

Source: Derived from S.C.O.P.A. #7 and summarized by Watson & Associates Economists Ltd.

4.3 Overview of Urban Land Needs

The County has identified that the Town of Bradford West Gwillimbury requires an additional 503 gross developable hectares for Community Area uses to accommodate population-related employment uses and a shortfall of approximately 7,100 housing units. As a comparison, the Community Area land requirement for the Town of Bradford West Gwillimbury represents approximately 42% of the County's total requirement for Community Area lands. Other municipalities in Simcoe County with identified need for additional Community Area lands include the Township of Essa and the Town of New Tecumseh.

The County has not identified a need to expand Employment Area lands in the Town of Bradford West Gwillimbury. The County has identified the need to expand Employment Areas in the Town of New Tecumseh, the Town of Collingwood, and the Township of Clearview. It is important to note that Bradford West Gwillimbury will need to utilize its entire current Employment Area supply to meet the growth forecasts for 2051. Therefore, ongoing monitoring of the Employment Area is crucial due to the tight land supply. As part of the Employment Strategy Report, Watson will review the timing and phasing of Employment Area lands. Furthermore, Watson will review the demand and appropriate timeframe for the need of the Highway 400 Reserve Lands. The land needs assessment conducted by the County to support S.C.O.P.A. #7 has determined that a portion of the Bradford West Gwillimbury Strategic Settlement Employment Area,



specifically the Highway 400 Reserve Lands encompassing approximately 160 developable hectares, is not included in the Employment Area land supply as outlined in the County's Land Needs Assessment Report.^[54]

5. Local Growth Allocations

Based on a review of historical trends, anticipated development in planning applications, and discussions with the Town on opportunities and challenges by settlement area, Watson has allocated the Town of Bradford West Gwillimbury population and housing growth by the following areas:

- Bradford;
- Bond Head; and
- Remaining Rural (includes Newton Robinson Settlement Area, rural clusters, and other remaining rural area).

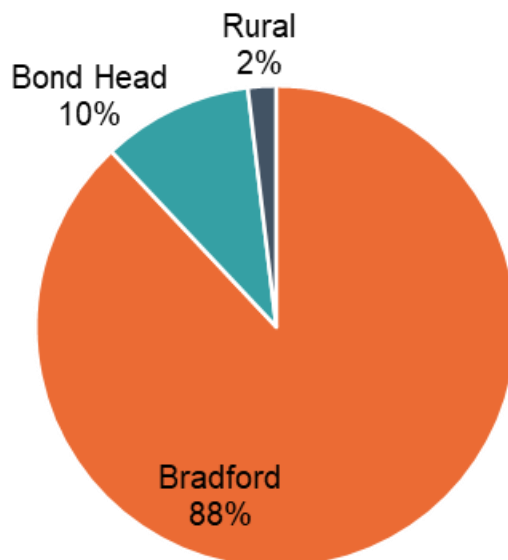
5.1 Historical Growth and Development Trends by Urban Area

Over the 2019 to 2023 period, the Bradford Urban Settlement Area has accommodated 88% of the new housing unit activity within the Town of Bradford West Gwillimbury, as summarized in Figure 21. The Bond Head Settlement Area has accommodated 10% of the new housing unit activity within the Town of Bradford West Gwillimbury with all development activity concentrated within the last two years. The Rural Area has accommodated 2% of housing activity within the Town of Bradford West Gwillimbury.

^[54] S.C.O.P.A. #7 and Hemson Consulting Ltd. Land Needs Assessment Memorandum dated May 31, 2022.



Figure 21
Town of Bradford West Gwillimbury
New Housing Unit Activity by Settlement Area and Rural Area, 2019 to 2023



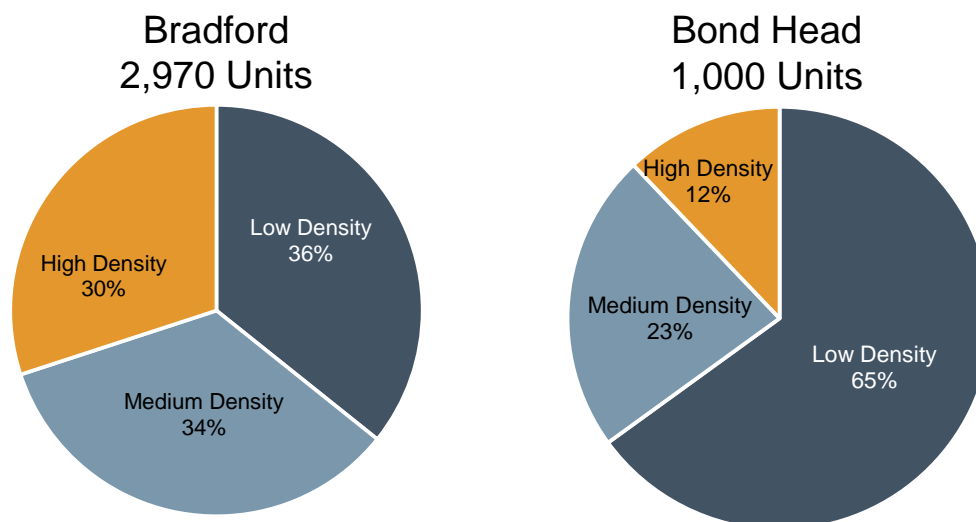
Source: Based on residential building permit data provided by the Town of Bradford West Gwillimbury. Summarized by Watson & Associates Economists Ltd.

5.2 Review of Housing Supply Potential by Urban Area

As summarized in Figure 22, the Bond Head Settlement Area has the potential to accommodate 1,000 housing units in active development applications, while the Bradford Urban Area has the potential of 2,970 housing units in active development applications. The Bradford Urban Area offers the widest range of housing options, with a housing mix of 36% low density, 34% medium density, and 30% high density. Furthermore, based on a review of development applications, approximately 400 housing units in the Bradford Urban Area are anticipated to provide housing for seniors (independent living). The Bond Head Settlement Area includes primarily at-grade housing opportunities, including 65% low-density housing and 23% medium-density housing. Approximately 12% of the housing unit potential in active development applications in Bond Head are in the form of high-density housing.



Figure 22
Town of Bradford West Gwillimbury
Housing Unit Potential in Active Development Applications, as of Mid-2024



Notes:

- Low density includes single and semi-detached houses
- Medium density includes townhouses and apartments in duplexes.
- High density includes bachelor, 1-bedroom, 2-bedroom+ apartment units.
- Figures have been rounded.

Source: Data provided by the Town of Bradford West Gwillimbury, summarized by Watson & Associates Economists Ltd.

Further details on the active development applications are provided in Appendix B.

5.3 Anticipated Growth by Area

The majority of population and housing growth is anticipated to be accommodated in the Bradford Urban Area. In addition to providing full municipal services, the Bradford Urban Area offers a variety of community services and amenities that cater to a growing population base. It also provides opportunities for growth through both intensification and the development of its remaining greenfield areas.

Within the Bond Head Settlement Area, growth to 2051 is anticipated to be limited to development in active plans. Furthermore, it is noted that Bond Head is not likely to experience a significant amount of intensification in the existing developed area due to



servicing constraints.^[55] According to the Town's O.P. (Bond Head Secondary Plan), Bond Head is anticipated to reach a population of 4,400 people in approximately 1,300 housing units.^[56] Since 2021, the Town has issued building permits for the development of approximately 170 housing units in Bond Head and active development applications provide the potential for an additional 1,000 housing units.^[57] Additional growth beyond this is not anticipated in the Bond Head Settlement Area.

Due to provincial policy direction (P.P.S., 2024), which encourages growth to be directed to serviced settlement areas, growth within the Rural Area is anticipated to represent a relatively small share of the Town's growth over the long term.

The Town's housing growth has been allocated based on the assumptions discussed above. As summarized in Figure 23, growth within Bond Head over the 2021 to 2051 period is anticipated to represent 7% of the Town's housing growth, based on recent building permit activity and anticipated housing in active development applications. The Rural Area is anticipated to represent 1% of the Town's housing growth. The Bradford Urban Area is anticipated to accommodate most of the Town's housing growth, representing 92% of the Town's growth. As part of the Intensification Analysis Report, Watson will provide further details on the growth allocation by policy area in the Bradford Urban Area (i.e., the D.G.A. and the B.U.A.).

Further details on the population and housing growth allocations are provided in Appendix C.

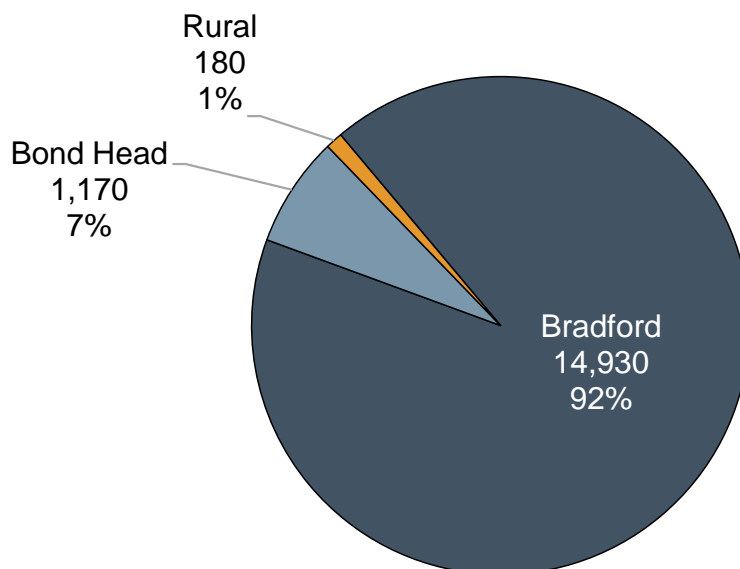
^[55] As of the 2021 Census, the Bond Head Settlement Area had a population of 550. Based on Statistics Canada Census 2021.

^[56] Town of Bradford West Gwillimbury Official Plan (March 21, 2021), Policy 5.1.1.2, p. 125.

^[57] Based on data from the Town of Bradford West Gwillimbury.



Figure 23
Town of Bradford West Gwillimbury
Housing Growth Allocations, 2021 to 2051



Source: Watson & Associates Economists Ltd.

6. Next Steps

This document serves as a foundational overview of S.C.O.P.A. #7 and is integral to the Town's G.M.S. As part of the Town of Bradford Gwillimbury's G.M.S., Watson will conduct further analysis to evaluate the potential for intensification in the Town and employment opportunities within the Town's designated Employment Areas. The forthcoming Intensification Analysis Report will examine intensification prospects within the major transit station area and identify additional opportunities throughout the Town. As previously noted, the Town aims to achieve an intensification rate that necessitates a strategic shift towards growth through intensification. The Intensification Analysis Report will identify key areas for intensification, referred to as strategic growth areas, and will summarize the potential for intensification over both short- and long-term periods. As part of the Employment Strategy Report, Watson will offer insights into expected absorption levels across the Town's Employment Areas, detailing the anticipated sectors and their influence on these levels. Additionally, the Employment Strategy will address the demand for the Highway 400 Reserve Employment Lands.



Appendices



Appendix A

Town of Bradford West Gwillimbury Growth Forecast to 2051



Appendix A: Town of Bradford West Gwillimbury Growth Forecast to 2051

Figure A-1
Town of Bradford West Gwillimbury
Population and Housing Growth Forecast

Period	Population (includes Census Undercount)	Low Density Housing Units	Medium Density Housing Units	High Density Housing Units	Other Housing Units	Total Housing Units	Persons Per Unit
Mid-2006	25,100	6,480	800	640	35	7,955	3.16
Mid-2011	29,300	7,680	1,000	735	45	9,460	3.10
Mid-2016	36,800	9,410	1,365	775	35	11,585	3.18
Mid-2021	44,700	10,965	1,525	885	35	13,410	3.33
Mid-2024	48,600	11,550	1,835	1,170	35	14,590	3.33
Mid-2026	49,800	11,985	1,975	1,425	35	15,420	3.23
Mid-2031	57,300	13,890	2,630	1,865	35	18,420	3.11
Mid-2036	64,300	15,720	3,285	2,385	35	21,425	3.00
Mid-2041	70,700	17,455	3,925	2,910	35	24,325	2.91
Mid-2046	77,100	19,065	4,540	3,430	35	27,070	2.85
Mid-2051	83,500	20,570	5,140	3,945	35	29,690	2.81
2021-2026	5,100	1,020	450	540	0	2,010	-
2021-2031	12,600	2,925	1,105	980	0	5,010	-
2021-2036	19,600	4,755	1,760	1,500	0	8,015	-
2021-2041	26,000	6,490	2,400	2,025	0	10,915	-
2021-2046	32,400	8,100	3,015	2,545	0	13,660	-
2021-2051	38,800	9,605	3,615	3,060	0	16,280	-

Notes: Low density includes single and semi-detached houses; medium density includes townhouses and apartments in duplexes; and high density includes bachelor, 1-bedroom, and 2-bedroom+ apartment units. Figures have been rounded. Population undercount is estimated at 4%.

Source: Watson & Associates Economists Ltd., based on S.C.O.P.A. #7.



Figure A-2
Town of Bradford West Gwillimbury
Employment Growth Forecast by Employment Sector, 2024 to 2051

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	No Fixed Place of Work	Total Employment
Mid-2011	280	800	2,730	2,350	1,360	1,580	9,100
Mid-2016	315	1,160	2,510	2,940	1,900	1,575	10,400
Mid-2024	335	1,770	2,820	3,430	2,170	1,975	12,500
Mid-2026	340	1,880	3,040	3,770	2,560	2,010	13,600
Mid-2031	360	2,190	3,500	4,450	3,020	2,380	15,900
Mid-2036	370	2,550	4,310	5,080	3,450	2,840	18,600
Mid-2041	390	2,910	6,230	5,740	3,900	3,230	22,400
Mid-2046	400	3,280	8,410	6,410	4,360	3,640	26,500
Mid-2051	420	3,670	10,850	7,110	4,830	4,020	30,900
2024-2026	5	110	220	340	390	35	1,100
2024-2031	25	420	680	1,020	850	405	3,400
2024-2036	35	780	1,490	1,650	1,280	865	6,100
2024-2041	55	1,140	3,410	2,310	1,730	1,255	9,900
2024-2046	65	1,510	5,590	2,980	2,190	1,665	14,000
2024-2051	85	1,900	8,030	3,680	2,660	2,045	18,400

Note: Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021. Figures have been rounded.

Source: Watson & Associates Economists Ltd., based on S.C.O.P.A. #7.



Appendix B

Active Development Activity Summary Tables



Appendix B: Active Development Activity Summary Tables

Figure B-1
Town of Bradford West Gwillimbury
Active Development Applications (Net of Building Permits Issued) as of August 9, 2024

Status	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Seniors Housing Units ^[1]	Total Housing Units
Approved Site Plan	0	0	0	0	0
Proposed Site Plan	0	124	490	403	1,017
Approved Plan of Subdivision	316	90	0	0	406
Proposed Plan of Subdivision	1,395	1,032	121	0	2,548
Other Approved	2	0	0	0	2
Total Housing Units	1,713	1,246	611	403	3,973

^[1] High-density housing unit potential.

Note: As of August 9, 2024.

Source: Derived from the Town of Bradford West Gwillimbury development application information provided by Town staff.

Summarized by Watson & Associates Economists Ltd.



Figure B-2
Town of Bradford West Gwillimbury
Active Development Applications – Remaining Housing Units (Net of Building Permits Issued) as of August 9, 2024

#	Type of Application	File No(s).	Project Name	Location/ Address	Remaining Low-Density Units	Remaining Medium-Density Units	Remaining High-Density Units	Remaining Seniors Housing Units	Total Remaining Housing Units
1	Site Plan - Approved	D11-21-12	Simcoe County Housing Corporation	125 Simcoe Road	-	-	-	-	-
2	Other - Approved	D14-22-04, D10-22-14	Bayne Smith – Rezoning and Severance	671 Simcoe Road	1	-	-	-	1
3	Plan of Sub - Approved	D12-09-03	Bond Head Properties (North Plan)	NW & NE Quadrants of Bond Head	169	-	-	-	169
4	Plan of Sub - Approved	D12-10-01	Bradford Capital Holdings	SW Simcoe and Line 6	20	-	-	-	20
5	Plan of Sub - Approved	D12-19-04	Bradford East (Block 170, 51M-1137) Plan 51M-1245	SE Simcoe and Line 6	-	29	-	-	29
6	Plan of Sub - Approved	D12-10-02	Bradford East (north plan - phase 1) + Block 184 (5 singles)	SE Simcoe and Line 6	5	35	-	-	40
7	Plan of Sub - Approved	D12-10-02	Bradford East (south plan - phase 2)	SE Simcoe and Line 6	107	26	-	-	133
8	Site Plan - Approved	D14-18-07, D11-19-01	Cachet Harbour Developments	200 Dissette Street	-	-	-	-	-
9	Plan of Sub - Approved	D12-03-02	Dykie JV	SW Melbourne and Miller Park	9	-	-	-	9



#	Type of Application	File No(s).	Project Name	Location/ Address	Remaining Low-Density Units	Remaining Medium-Density Units	Remaining High-Density Units	Remaining Seniors Housing Units	Total Remaining Housing Units
10	Plan of Sub - Approved	D12-17-17	Mod-Aire, Block 178 (acquired by First View Homes Inc)	-	-	-	-	-	-
11	Other - Approved	D14-23-12	Morgis	4230 Line 2	1	-	-	-	1
12	Other - Approved		2122295 -	116 Church Street	-	-	-	-	-
13	Plan of Sub - Approved	D12-16-16	National Homes	SW PDD and Line 8	6	-	-	-	6
14	Plan of Sub - Approved	D12-20-05	Sandstorm Phase 8 A & B	Langford south of Line 8	-	-	-	-	-
15	Site Plan - Approved	D11-20-16	Serena Homes	263 Barrie St	-	-	-	-	-
21	Site Plan - Approved	D14-19-16, D12-24-01	Bradford Capital, Block 403- 51M-1063	SE Inverness and Line 6	-	-	-	-	-
43	Other - Approved		New House on Vacant Lot	2981 Line 5	-	-	-	-	-
ADU	Additional Residential Units	Based on Building Permit Applications	ACCESSORY DWELLING UNITS (2024)	various	-	-	-	-	-
16	Site Plan - Proposed	D14-17-02, D11-21-02	2393323 Ontario Inc. (Lions Estates)	266 Barrie St	-	18	-	-	18
17	Plan of Sub - Proposed	D14-21-02, D12-21-03	First View Homes (formerly Mod-Aire)	391 West Park (Block 106, 51M-1133)	-	38	-	-	38



#	Type of Application	File No(s).	Project Name	Location/ Address	Remaining Low-Density Units	Remaining Medium-Density Units	Remaining High-Density Units	Remaining Seniors Housing Units	Total Remaining Housing Units
18	Site Plan - Proposed	D09-22-01, D14-22-09, D11-23-02	Choice Properties (Nautical Lands Group)	500 Holland St W	-	-	-	76	76
19	Plan of Sub - Proposed	D12-10-03, D14-20-06	Bond Head South Plan	SW & SE Quadrants of Bond Head	431	171	121	-	723
20	Site Plan - Proposed	D14-23-12, D11-24-01	Bradford Capital Block 404 51M-1063	SE Simcoe and Line 6	-	12	-	-	12
22	Plan of Sub - Proposed	D09-15-02, D14-15-11, D12-15-10	Caprinox Developments	2676 Line 8	-	20	-	-	20
23	Site Plan - Proposed	D14-16-06, D11-16-05	Edward Gres	240 Holland St W	-	-	20	-	20
24	Site Plan - Proposed	D14-18-05, D11-18-05	Hillsport Holdings	558 Holland St W	-	-	-	130	130
25	Site Plan - Proposed	D14-19-07, D11-21-06	ISROC Building International Inc.	123 Holland St W & 126 Holland St W	-	10	99	-	109
26	Site Plan - Proposed	D11-23-07	LOFT	31 Fredrick Street	-	-	-	99	99
27	Site Plan - Proposed	D14-16-05, D11-16-04	Margaret Dudo	210 Holland St W	-	-	20	-	20
28	Plan of Sub - Proposed	D14-11-10, D12-11-07	Mod-Aire Homes / Millford Developments (Blk 31, 51M-423)	690 Simcoe Road	13	-	-	-	13
29	Plan of Sub - Proposed	D09-19-01, D14-19-08, D12-19-05, D11-23-04	Pantheon	SE Line 6 & Simcoe Rd	66	9	-	-	75



#	Type of Application	File No(s).	Project Name	Location/ Address	Remaining Low-Density Units	Remaining Medium-Density Units	Remaining High-Density Units	Remaining Seniors Housing Units	Total Remaining Housing Units
30	Site Plan - Proposed	D11-20-23	2194973 OI (Napoli/Luca)	149 Holland St. W.	-	-	12	-	12
31	Plan of Sub - Proposed	D09-17-01, D14-23-15 (CIHA), D12-23-11	Bradford Highlands Joint Venture (Bayview Wellington, et al.)	23 Brownlee, 2820, 2824, 2848 Line 5	538	460	-	-	998
32	Site Plan - Proposed	D09-15-01, D14-15-10	Caprinox Developments	2699 SR 10	-	10	-	-	10
33	Plan of Sub - Proposed	D14-21-16, D12-21-14	Sunrise Acquisitions (Dura Body)	2753 County Road 27	18	50	-	-	68
34	Site Plan - Proposed	D14-21-14, D11-21-09	10568848 Canada Limited	281 Barrie St.	-	28	-	-	28
35	Site Plan - Proposed	D14-22-11, D11-22-10	1800283 & 505845 Ontario Limited (Giancola)	54 & 64 Holland St. W.	-	-	112	98	210
36	Plan of Sub - Proposed	D09-23-01, D14-23-16, D12-23-12	Bradford East Developments Inc.	Danube Lane	32	61	-	-	93
37	Plan of Sub - Proposed	D14-17-11, D12-17-16	FMC Bond Head Development Holdings Ltd. (formerly Sunrise Homes)	2875 County Road 27	50	58	-	-	108
38	Plan of Sub - Proposed	D14-22-10, D12-22-10	FNB Phase 5	Crossland Blvd. & Professor Day Dr.	-	72	-	-	72
39	Plan of Sub - Proposed	D14-21-05, D12-21-09	Foxvalley Holdings Inc.	4140 County Road 88 (NE CR27 and CR88)	175	-	-	-	175



#	Type of Application	File No(s).	Project Name	Location/ Address	Remaining Low-Density Units	Remaining Medium-Density Units	Remaining High-Density Units	Remaining Seniors Housing Units	Total Remaining Housing Units
40	Site Plan - Proposed	D11-20-05	Triumph	2362 Line 8	-	-	227	-	227
41	Plan of Sub - Proposed	D14-23-13, D12-23-09	Tuscany Enclaves - Mod Aire	Professor Day Dr. and Holland St. W. (Part Block 107, 51M-271)	72	93	-	-	165
42	Site Plan - Proposed	D14-22-12, D12-22-15, D11-22-11	Eighth Line GP Inc. (Woods Property)	2659 Line 8	-	46	-	-	46
-	-	-	-	Totals	1,713	1,246	611	403	3,973

Notes: As of August 9, 2024. Sites with no remaining units include those where building permits have been issued for approved development.

Source: Derived from the Town of Bradford West Gwillimbury development application information provided by Town staff. Summarized by Watson & Associates Economists Ltd., 2024.



Appendix C

Town of Bradford West Gwillimbury Growth Forecast Allocations



Appendix C: Town of Bradford West Gwillimbury Growth Forecast Allocations

Figure C-1
Bradford Urban Area
Population and Housing Growth, 2021 to 2051

Timing	Low-Density Units	Medium-Density Units	High-Density Units	Total Housing Units	Population Growth, Including Undercount
2021-2024	394	308	284	986	3,100
2021-2026	707	451	539	1,697	4,000
2021-2031	2,304	963	899	4,166	10,000
2021-2036	3,844	1,529	1,378	6,751	15,900
2021-2041	5,548	2,169	1,904	9,621	22,600
2021-2046	7,127	2,788	2,426	12,341	29,200
2021-2051	8,604	3,385	2,940	14,929	35,700

Figure C-2
Bond Head Settlement Area
Population and Housing Growth, 2021 to 2051

Timing	Low-Density Units	Medium-Density Units	High-Density Units	Total Housing Units	Population Growth, Including Undercount
2021-2024	171	0	0	171	700
2021-2026	285	0	0	285	1,100
2021-2031	563	144	79	786	2,700
2021-2036	821	229	121	1,171	3,900
2021-2041	821	229	121	1,171	3,900
2021-2046	821	229	121	1,171	3,900
2021-2051	821	229	121	1,171	3,800

Notes: Low density includes single and semi-detached houses; medium density includes townhouses and apartments in duplexes; and high density includes bachelor, 1-bedroom, 2-bedroom+ apartment units. Figures have been rounded. Population undercount is estimated at 4%.

Source: Watson & Associates Economists Ltd., based on S.C.O.P.A. #7.



Figure C-3
Rural Area
Population and Housing Growth, 2021 to 2051

Timing	Low-Density Units	Medium-Density Units	High-Density Units	Total Housing Units	Population Growth, Including Undercount
2021-2024	20	0	0	20	100
2021-2026	30	0	0	30	0
2021-2031	60	0	0	60	-100
2021-2036	90	0	0	90	-300
2021-2041	120	0	0	120	-500
2021-2046	150	0	0	150	-600
2021-2051	180	0	0	180	-700

Notes: Low density includes single and semi-detached houses; medium density includes townhouses and apartments in duplexes; and high density includes bachelor, 1-bedroom, and 2-bedroom+ apartment units. Figures have been rounded. Population undercount is estimated at 4%.

Source: Watson & Associates Economists Ltd., based on S.C.O.P.A. #7.