



Employment Lands Strategy, Phase 1 Council Presentation

Gregory Bender, MCIP, RPP, Manager, Municipal Planning, WSP
Jamie Cook, MCIP, RPP, PLE, Managing Partner and Director, Watson
Elizabeth Bang, MCIP, RPP, Senior Consultant, Watson

April 28th, 2020 ¹

Purpose of the Study



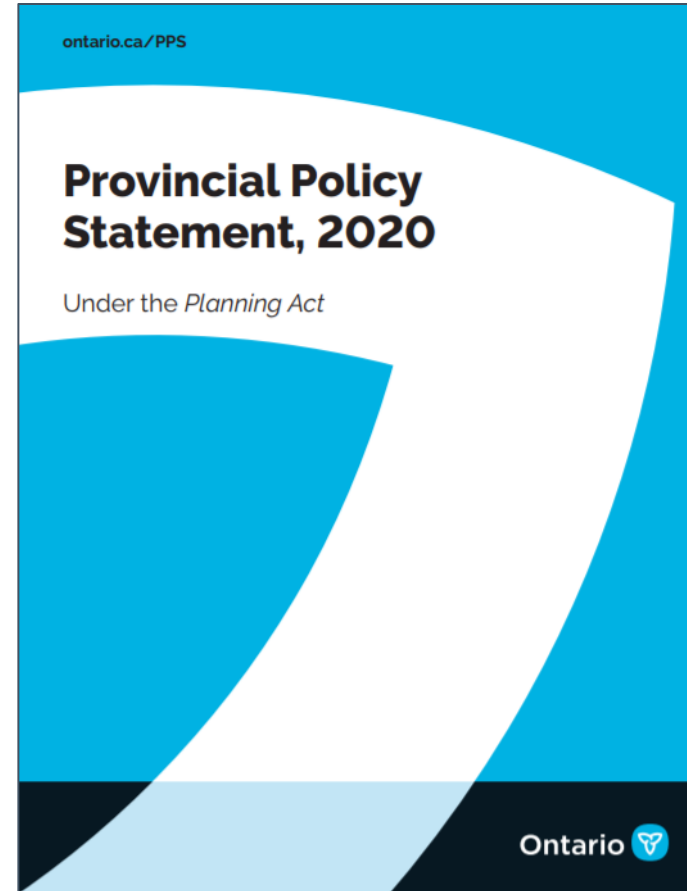
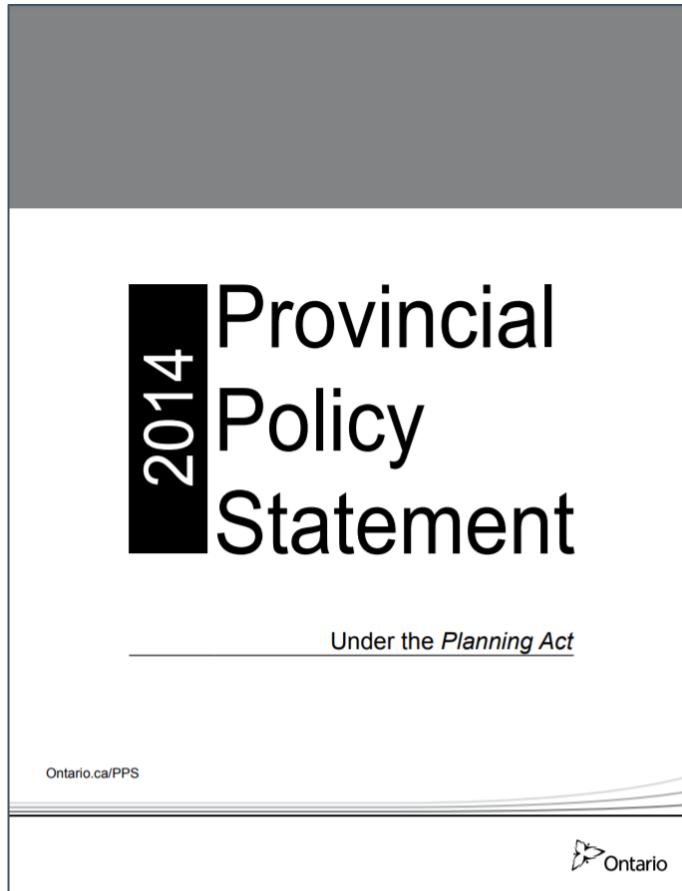
- Updating Growth Analysis Study (November 2015) prepared by Watson & Associates Economists Ltd.
 - Provided 2031 Town-wide population, housing, and employment forecasts based on Essex County Foundation Report (August 2011).
- Phase 1 of an Employment Lands Strategy for the Town with the purpose of providing a comprehensive update of the Town's long-term employment land needs over the next 20 to 25-years.

Work Plan

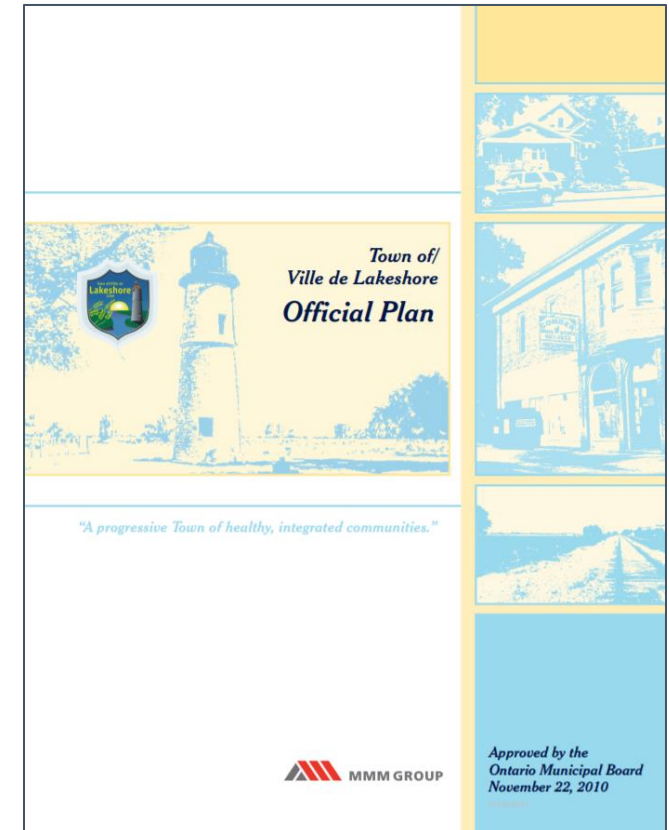


Planning Framework

Planning Framework

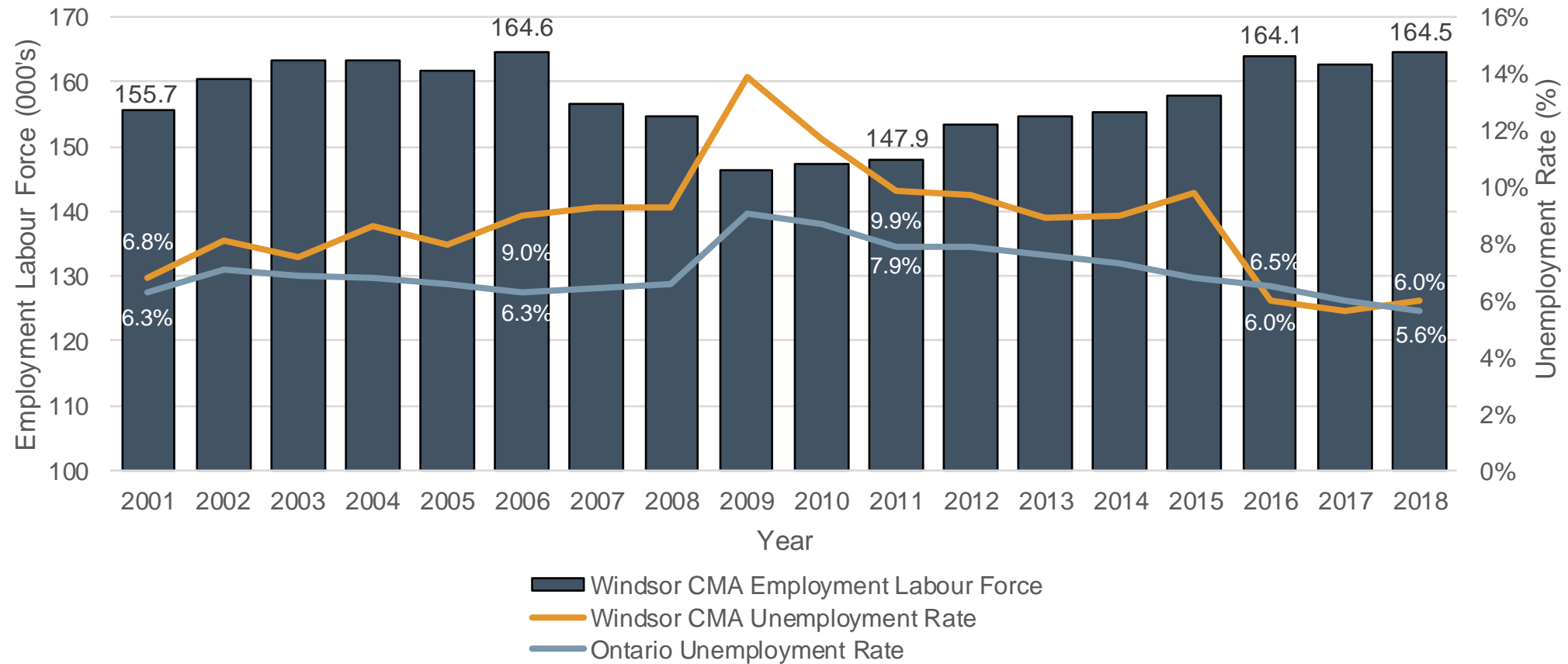


(in-effect May 1, 2020)



Macro-Economic Trends and Growth Drivers

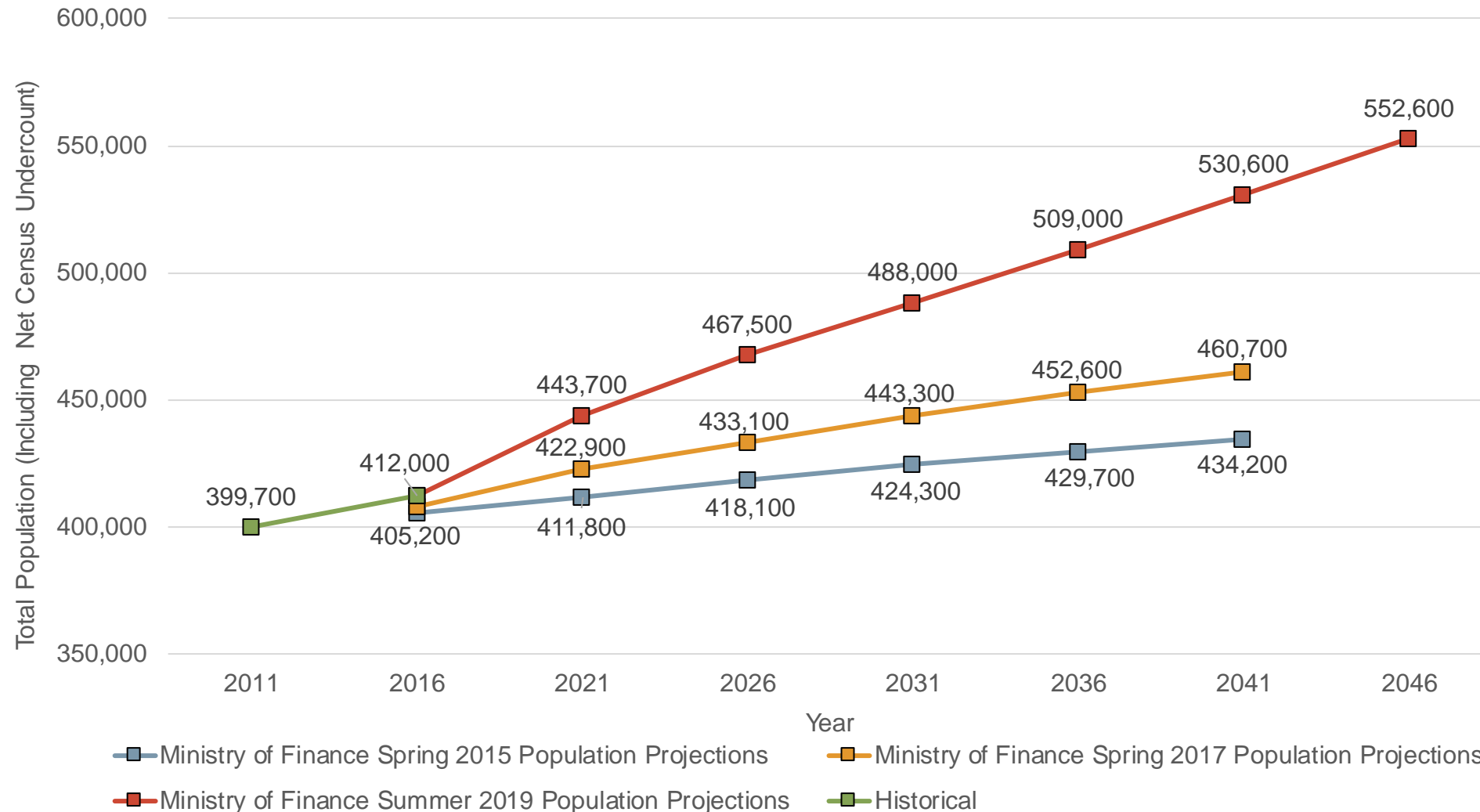
Windsor C.M.A., Labour Force Trends, 2001 to 2018



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

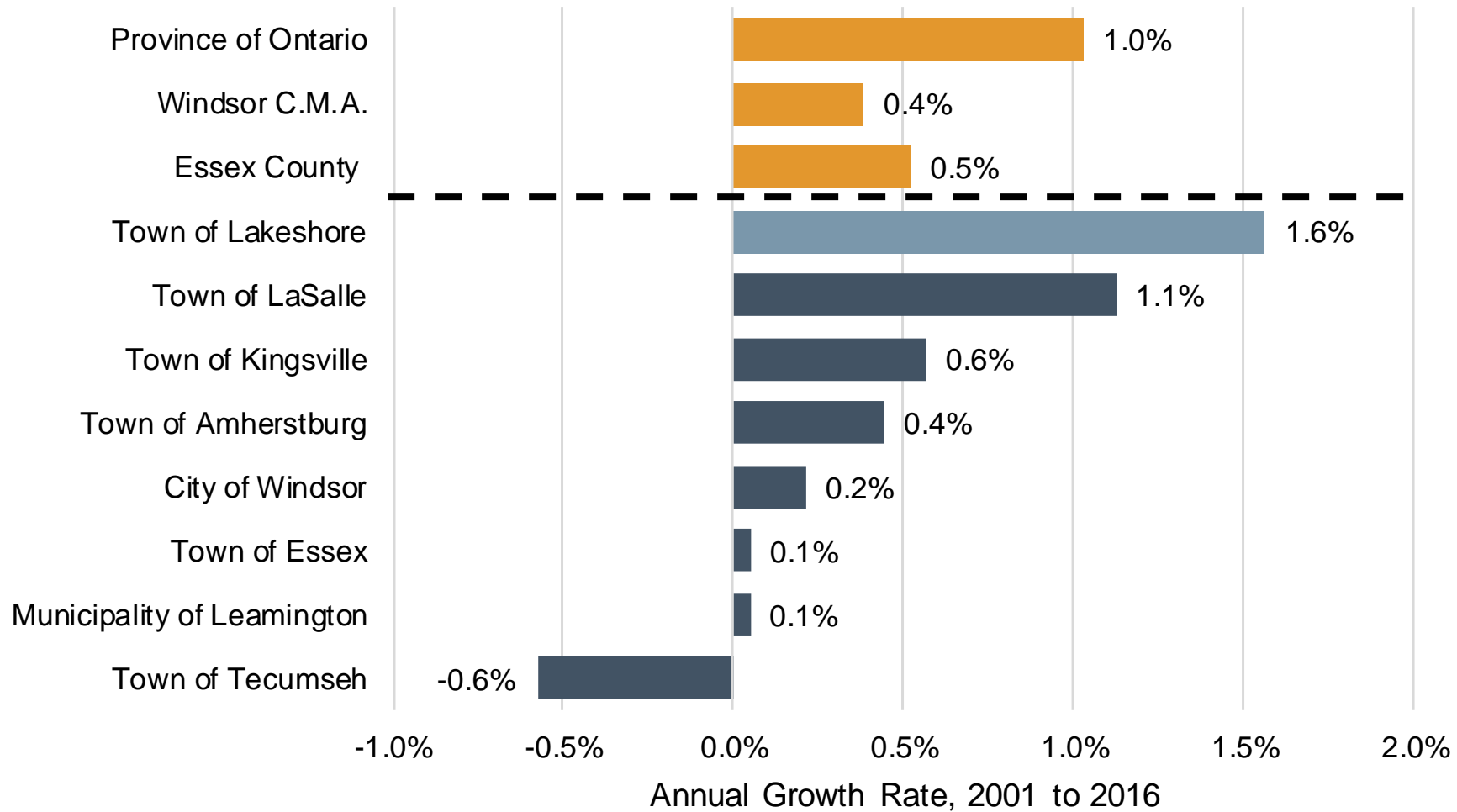
Source: Windsor CMA employed labour force from Statistics Canada Table 14-10-0098-01 and unemployment rate from Table 14-10-0096-01. Province of Ontario unemployment rate from Statistics Canada Table 14-10-0090-01. By Watson & Associates Economists Ltd., 2019.

Ministry of Finance Population Projections for the Windsor-Essex Area



Source: Ministry of Finance Population Projections. 2011 and 2016 from Statistics Canada Census.

Essex County Historical Annual Population Growth Rate, 2001 to 2016

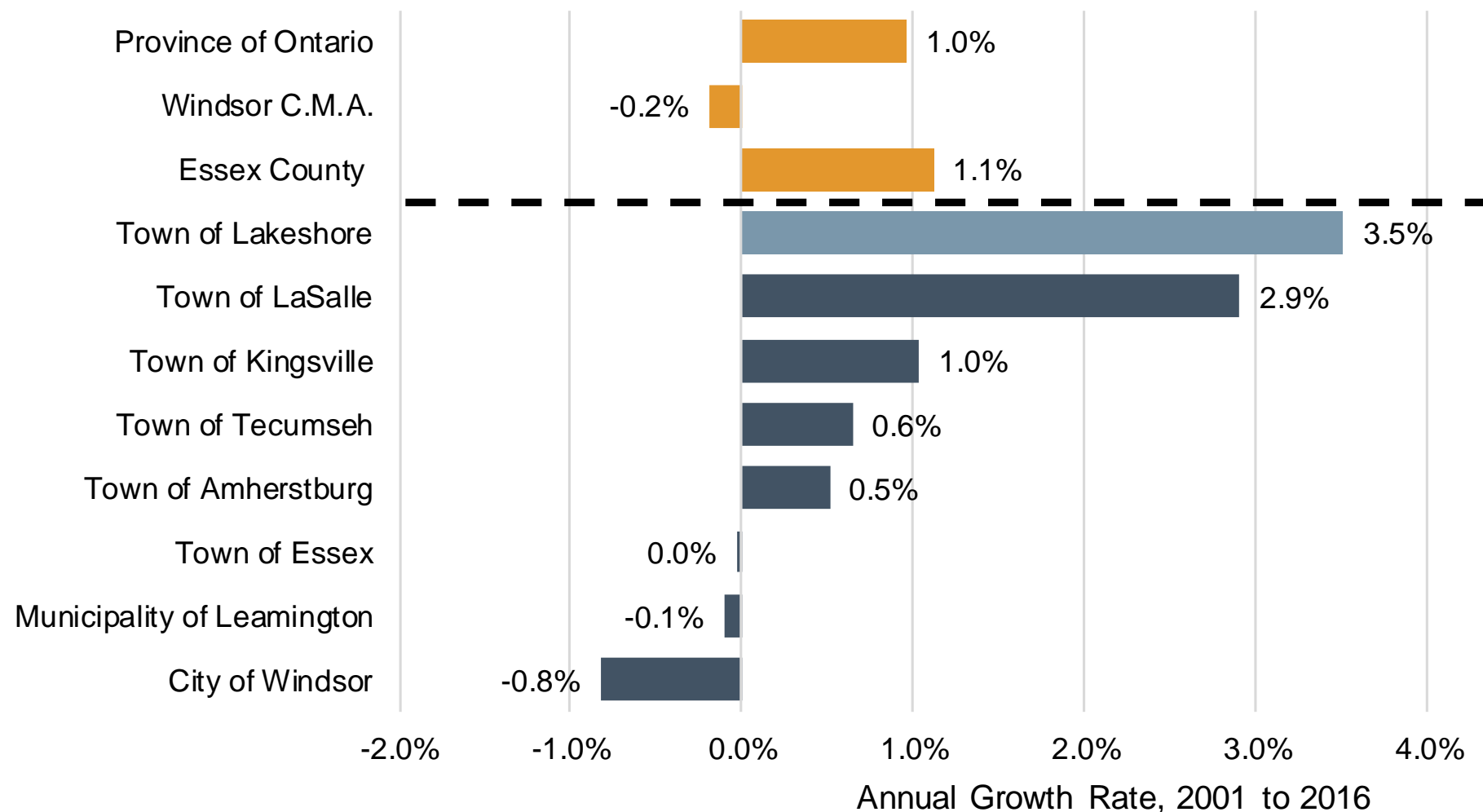


Source: Statistics Canada Census (2001 and 2016), by Watson & Associates Economists Ltd., 2020.

Note: Population figures include the net Census undercount.

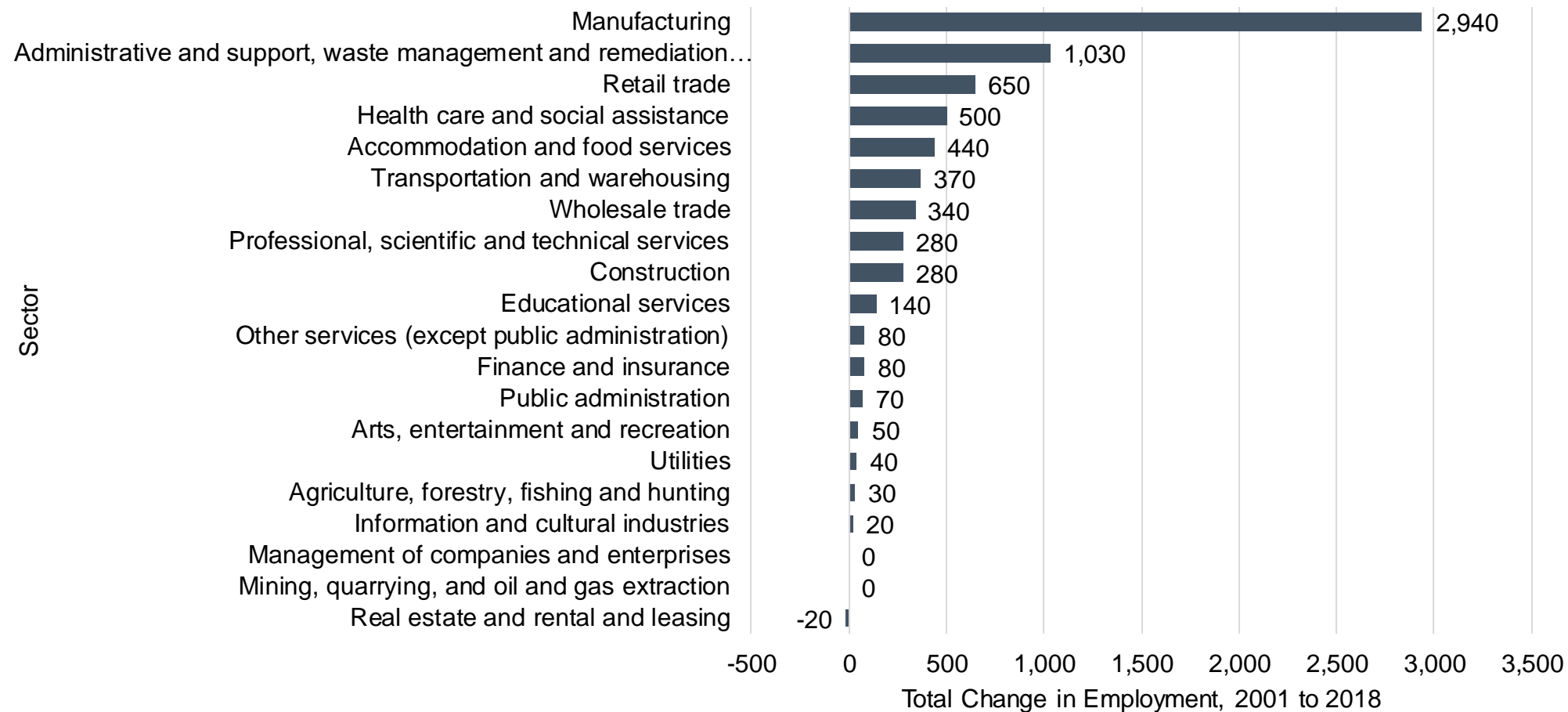
Note: Essex County excludes the City of Windsor.

Essex County Historical Annual Employment Growth, 2001 to 2016



Source: Statistics Canada Census (2001 and 2016), by Watson & Associates Economists Ltd., 2020.
Note: Essex County excludes the City of Windsor.

Town of Lakeshore Employment Growth by Sector, 2001 to 2018



Source: Derived from EMSI dataset Q2 2019, by Watson & Associates Economists Ltd., 2019.

Long-Term Population, Housing and Employment Forecast to 2046

What Drives Population Growth?



Economics

Local and Regional
Economic Outlook



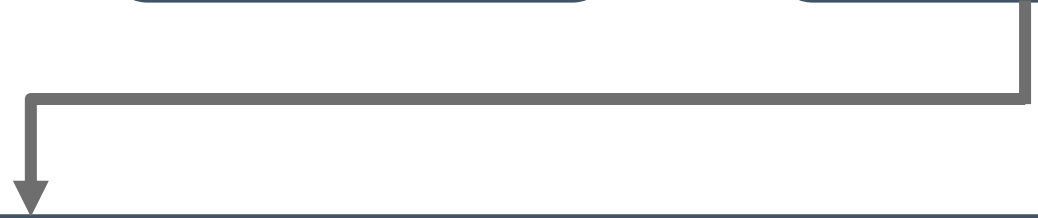
Economic Drivers of
Population and
Employment Growth by
Area



Labour Force Growth
within the Commuter
Shed



Forecast Employment
Growth by Sector



Demographics

Net Migration and
Natural Increase



Population and Housing
forecast 2016 to 2041

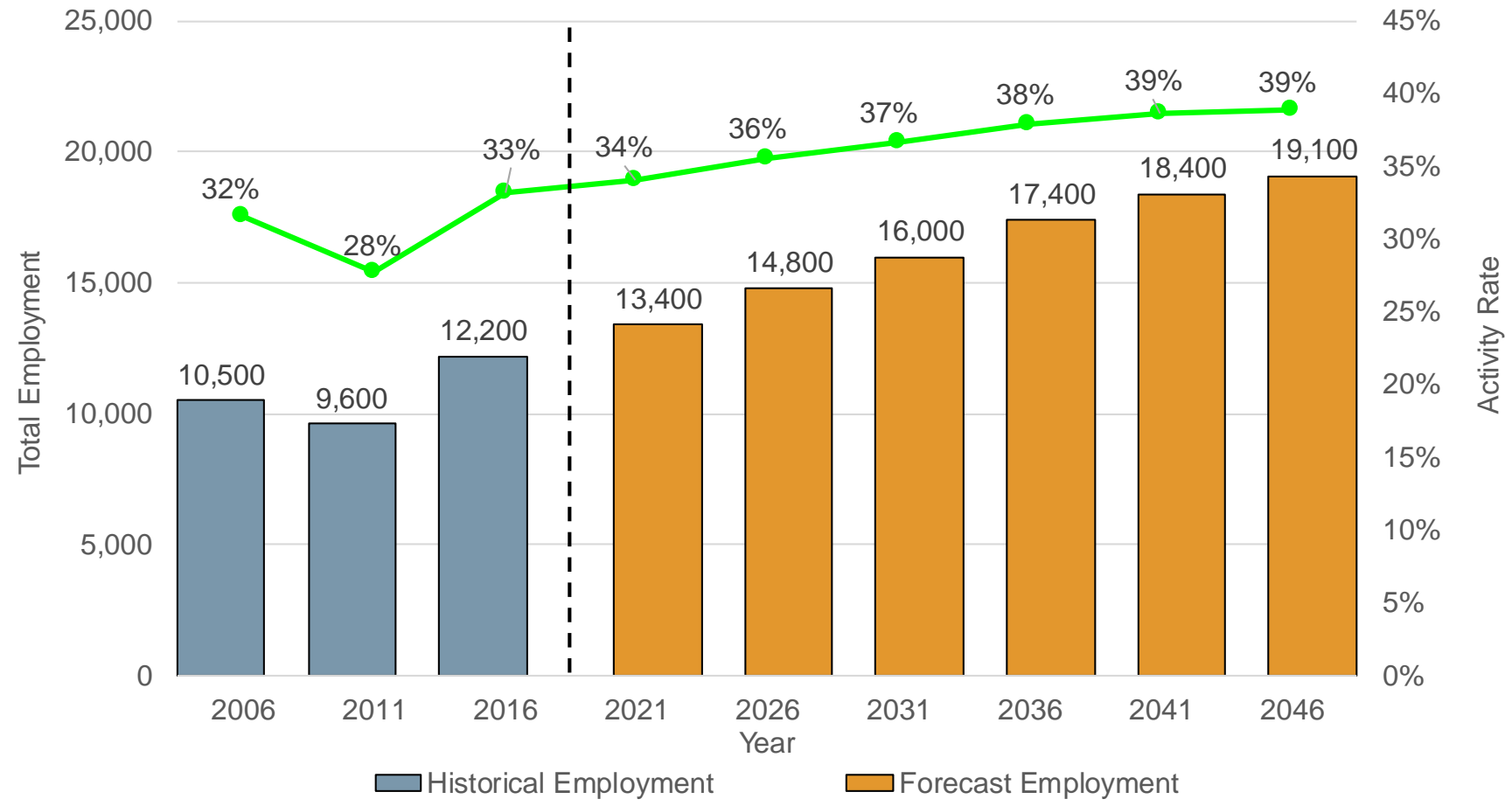


Housing Forecast by
Type and Tenure, 2016
to 2041



Population, Housing,
and Employment
Growth Scenarios

Town of Lakeshore Employment Forecast, 2016 to 2046



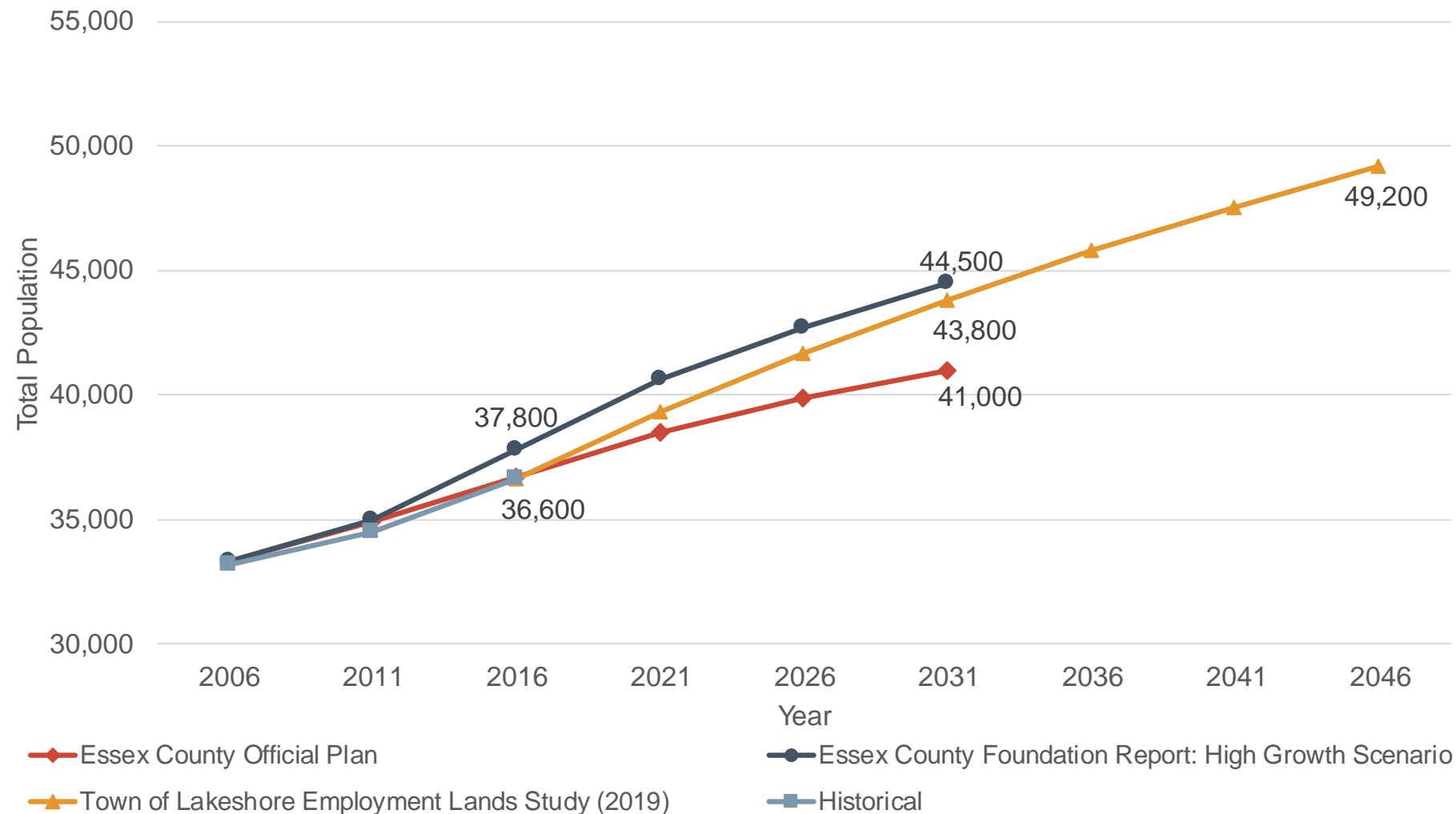
Note: Activity rate is calculated with population including the net Census undercount.

Source: 2001 to 2016 from Statistics Canada place of work data including work at home and excluding no fixed place of work.

2016 to 2046 employment forecast derived by Watson & Associates Economists Ltd., 2019.

Note: Numbers have been rounded

Town of Lakeshore Population Forecast Comparison, 2016 to 2046



Source: Historical data from Statistics Canada Census, 2001 to 2016. Derived by Watson & Associates Economists Ltd., 2019.
Note: Population figures exclude the net Census undercount estimated at 2.8%.

Employment Land Needs to the Year 2044 *

* in anticipation of the updated 2020 Provincial Policy Statement (in-effect May 1, 2020)

Town of Lakeshore Vacant Employment Land Supply



Key Development Area	Total Vacant Land Supply (gross ha)	Constrained Lands (Long Term) (gross ha)	Total Vacant Land Supply Adjusted for Constrained Lands (gross ha)
Comber	103	90	13
Stoney Point	91	91	0
Maidstone Urban Area	120	37	83
South Woodslee	1	1	0
Total	315	220	96
Total (adjusted) ¹	189	132	57

¹ Adjusted for internal infrastructure and long-term vacancy

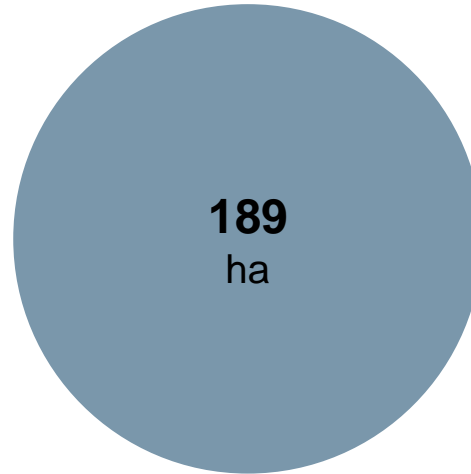
Note: Numbers may not add precisely due to rounding.

Employment Land Needs to the Year 2044*

Including Constrained Lands



Total Urban Employment Land
Demand in the Town



Town-wide Employment Land
Supply ¹



Land Surplus in the Town

* in anticipation of the updated 2020 Provincial Policy Statement (in-effect May 1, 2020)

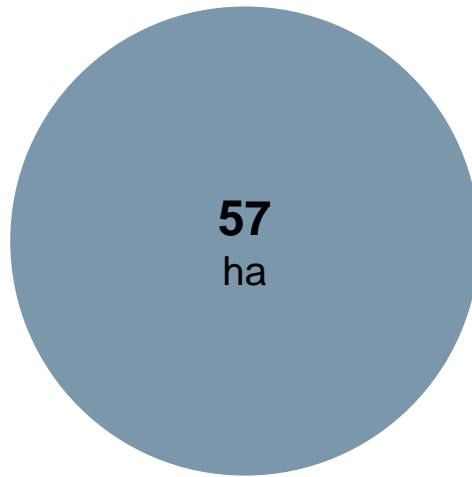
¹ Adjusted for internal infrastructure and long-term vacancy

Employment Land Needs to the Year 2044*

Not Including Constrained Lands



Total Urban Employment Land
Demand in the Town



Town-wide Employment Land
Supply ¹



Land Shortfall in the Town

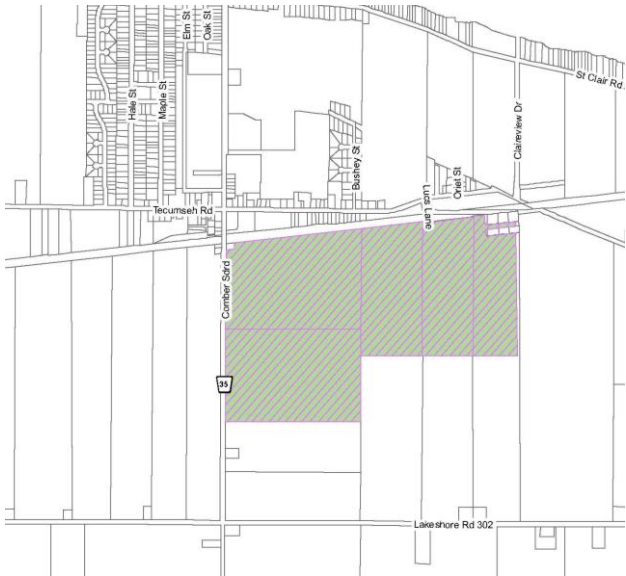
* in anticipation of the updated 2020 Provincial Policy Statement (in-effect May 1, 2020)

¹ Adjusted for internal infrastructure and long-term vacancy

Town of Lakeshore Employment Land Supply



Maidstone Urban Area



Stoney Point Urban Area



South Woodslee Hamlet



Comber Urban Area



Mapping provided by the Town of Lakeshore, 2019

Conclusion and Next Steps

Conclusions

Phase 1 Findings - Population, Housing and Employment Outlook



- Over the past five years, the regional economy has continued to recover from the 2008/2009 global economic downturn. During this time period, the Town's employment base in sectors such as industrial and professional, scientific, and technical services, have steadily grown.
- Lakeshore's population and labour force base is aging. This is anticipated to place downward pressure on longer-term population and employment growth rates.
- Looking forward, housing preferences are anticipated to gradually shift to medium- and high-density housing forms driven by the need for seniors' and affordable housing as the Town's seniors' population steadily increases.
- Similar to the broader regional areas as a whole, population growth within the Town is expected to be driven by net migration.

Conclusions

Phase 1 Findings – Employment Land Needs



- A surplus of approximately 78 ha (194 acres) of employment lands (industrial lands) has been identified to accommodate employment growth over the next 25-year forecast period.
- Despite the availability of vacant employment land, most of the Town's total vacant employment land supply is constrained by servicing.
- If constrained employment lands were removed from the Town's employment land supply, the Town would potentially experience an employment land shortfall of between 53 net ha (132 net acres) over the 25-year forecast period.

Next Steps



- Council Adoption of Report
 - Including growth projections and associated directions
 - Growth projections and directions are to be used as part of the County's Official Plan Update
- County to complete an Official Plan Review
- Town would then undertake Official Plan Review (to conform to County's new Official Plan)
 - Use County Official Plan (based off of projections and direction from ELS Report) as part of the Town's Official Plan Review