

AGENDA

SPECIAL MEETING OF COUNCIL



**Thursday, October 7, 2021
9:15 a.m.
Via Zoom Meeting
9 James Street, Parry Sound, Ontario**

To ensure the practice of proper social distancing measures, and to help prevent the spread of COVID-19 in the community, Council Meetings will be held electronically in accordance with section 238 of the Municipal Act, 2001. All Meetings will be recorded, and posted on the Township website for members of the public to view.

1. CALL TO ORDER

- i) National Anthem
- ii) Approval of Agenda
- iii) Traditional Land Acknowledgement Statement
- iv) Announcement of Public Meetings

2. DISCLOSURE OF PECUNIARY INTEREST

3. MINUTES OF THE PREVIOUS MEETING

4. DEPUTATIONS

5. CLOSED MEETING

- 21- NOW THEREFORE BE IT RESOLVED** that Council move into a CLOSED MEETING at _____ a.m./p.m., pursuant to Section 239(2) of the *Municipal Act, 2001*, S.O. 2001, c.25, as amended.

OPEN MEETING

- 21- NOW THEREFORE BE IT RESOLVED** that Council move out of a CLOSED MEETING at _____ a.m./p.m.

- 6. UNFINISHED PLANNING BUSINESS
- 7. OFFICIAL PLAN/ZONING AMENDMENTS
- 8. CONSENT APPLICATIONS
- 9. SITE PLAN CONTROL
- 10. SHORE/CONCESSION ROAD ALLOWANCES
- 11. CAO REPORT ON COUNCIL DIRECTIONS
- 12. REPORT OF TASK FORCES/COMMITTEES
- 13. CORRESPONDENCE
- 14. OTHER BUSINESS

i) J.L Richards & Associates Ltd. – Land Demand and Supply Analysis

Pages:

- 15. BY-LAWS
- 16. QUESTION TIME
- 17. NOTICES OF MOTION
- 18. CONFIRMING BY-LAW
- 21- Being a By-law to Confirm the Proceedings of the Special Meeting of Council held on October 7, 2021.
- 19. ADJOURNMENT

Prepared for:

THE TOWNSHIP OF THE ARCHIPELAGO
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The Township of The Archipelago

Land Demand and Supply Analysis



The Township of The Archipelago Land Demand and Supply Analysis

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Definitions

| | |
|--------------------------------------|--|
| Compounded Annual Growth Rate | the geometric progression ratio that provides a constant growth rate over the time period |
| Labour Force | the total population aged 15 years and over, willing and able to offer or supply labour services in their labour markets |
| Participation Rate | the total labour force, expressed as a percentage of the total population |
| Employment Rate | the number of employed persons, expressed as a percentage of the total population aged 15 years and over, in that group |
| Unemployment Rate | the number of unemployed persons, expressed as a percentage of the labour force |

Abbreviations

| | |
|--------------|---|
| CAGR | Compounded Annual Growth Rate |
| CD | Census Division |
| CSD | Census Subdivision |
| MPAC | Municipal Property Assessment Corporation |
| NAICS | North American Industry Classification System |
| NHS | National Household Survey |

The Township of The Archipelago Land Demand and Supply Analysis

Executive Summary

The Township of The Archipelago is a single tier, rural municipality situated on the shores of Georgian Bay, within West Parry Sound in the District of Parry Sound. The Archipelago is approximately 58,926 ha in area and forms part of the Georgian Bay Biosphere Reserve and 30,000 Islands.

The Official Plan for the Township of The Archipelago came into effect on June 1, 1983. Section 19 of the Official Plan, which speaks to the review of the Official Plan, commits Council to undertaking a study to determine whether sufficient land is available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 20 years including in the Pointe au Baril Station and employment lands.

In 2021, The Archipelago retained J.L. Richards & Associates Ltd. to prepare a land demand and supply analysis for the municipality. Since this time, we have prepared population, household and employment land forecasts for the municipality, examined available land supply and estimated future potential land supply based on The Archipelago's in effect land use planning framework.

It should be noted that, notwithstanding the 20 year timeframe set out in the Official Plan, our forecasts are for a 25 year period, to reflect recent changes in the 2020 Provincial Policy Statement that came into effect since the Official Plan came into effect.

The outcome of our analysis suggests that The Archipelago has enough land available to accommodate the anticipated residential and employment growth to 2046. Using the reference scenario described in this report, The Archipelago is expected to grow by 50 year round residents, 48 year round households, 232 seasonal households and 15 new employment lots by 2046. There are 202 existing vacant legal lots of record available for development in the Township today. A further 242 lots can be created, based on the current lot creation policies in the Official Plan. The demand for approximately 295 lots, is less than the supply of approximately 444 lots.

This land demand and supply analysis is the first of its kind for The Archipelago. It is based on existing and available information and represents a snapshot of future possible economic and demographic trends and land supply. The actual future economic and demographic trends that are experienced may differ from those described in this report. For this reason, and consistent with best practices elsewhere, the Township should update this report in regular five year cycles to ensure that its land supply is adequate to meet future residential and employment land demand.

The Township of The Archipelago Land Demand and Supply Analysis

1.0 Introduction

The Township of The Archipelago (The Township) has retained J.L. Richards and Associates to undertake a land demand and supply analysis for the municipality. This report includes population, housing and employment forecasts for The Township from 2021 to a 2046 horizon. These forecasts have been prepared to assess the land needs and further guide the development of policies related to planning and growth management at the municipal level.

1.1 Purpose

The Official Plan of The Township of The Archipelago (Official Plan) came in to effect on June 1, 1983. It establishes land use policies to guide development and provide for the long-term use of land and water for public and private recreation in the municipality.

The Planning Act, under Section 26, requires municipalities to review its official plan every five years or every 10 years if a new Plan is adopted, to confirm consistency with Provincial Policy. Further, The Township's Official Plan also requires the Council to revise the Official Plan within five years of the date the previous such revision came into effect. The last 5-year Official Plan review was approved and came in effect on December 22, 2018.

Section 19 of the Official Plan necessitates the Council to undertake a land supply study prior to revising the Plan. Such a study entails determining whether sufficient land is available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 20 years. A detailed description of the land use planning context for this study is provided in Appendix A.

The purpose of this study is to undertake a land supply study pursuant to Section 19 of the Official Plan and provide a basis to revise the Official Plan.

1.2 Approach and Methodology

The approach adopted for this study was to decode two overarching questions of what the total demand for land is in the coming years and if there is adequate land supply for this forecasted demand in The Township. Existing information relating to population, housing, employment, development applications and building permit activity within The Township was reviewed to understand historic and emerging trends.

The study was divided into two distinct and overlapping stages. These are described briefly in the following subsections. Refer to Appendix B for a detailed description of the methods used in the estimation of land demand and land supply.

1.2.1 Land Demand

Land demand was estimated through conversion of population, housing and employment forecasts for The Township. The forecast methods were customized to suit The Township of The Archipelago and available data. Secondary source data was used to forecast future population, housing and employment in The Township over a time horizon of 25 years spread across five-year intervals. Emerging trends such as additional accessory dwelling units, work from home

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culture with improved access to communications technology, and immigration plans were also considered to forecast population, housing and employment in The Township.

1.2.2 Land Supply

The existing parcel fabric within The Township was analysed to establish the existing vacant land supply. Based on current Official Plan policy, opportunities for further development through lot creation, intensification and redevelopment within the different neighbourhoods of The Township were considered to estimate future land supply in The Township. The estimated demand for land was compared against the existing and future supply.

1.3 Data Availability and Limitations

This study was completed based on existing and available information on the Township published by the Federal Government, Provincial Government or the Township. Table 1 below summarizes the data that was available from different sources and which was used for this study.

The available data posed some limitations to this study and the study findings summarized in this report should be interpreted in consideration of the data constraints. In particular, it should be noted that labour force data for The Township for 2011 has been suppressed by Statistics Canada for privacy reasons. Ministry of Finance population estimates were only available at the District level. MPAC parcel fabric data for 2017 was not available.

Table 1. Data Availability

| Source | Data | Level |
|---------------------|--|---|
| Statistics Canada | Census 2001, 2006, 2011, 2016 – <ul style="list-style-type: none">• Population and Dwelling Counts• Age Characteristics• Labour Force Status (NHS data) | District (census division) Township (census subdivision) |
| Statistics Canada | Population Estimates (2001-2020) | District (census division) Township (census subdivision) |
| Ministry of Finance | Population Projections | District (census division) |
| The Township | MPAC Parcel fabric (2007-2020, except 2017) | Township (census subdivision) |
| The Township | Development Applications – <ul style="list-style-type: none">• Official Plan and Zoning Bylaw Amendments• New Lots• Committee of Adjustment• Site Plan Agreements | Township (census subdivision) |
| The Township | Building Permit Activity – <ul style="list-style-type: none">• Single family dwellings, 2000-2020• Seasonal dwellings, 2000-2020 | Township (census subdivision) |

Note: District (census division) refers to the District of Parry Sound

The historic development and building permit activity data did not correlate to the MPAC parcel fabric data provided by The Township. Further, the MPAC property codes did not always match the zones defined in The Township's Comprehensive Zoning By-law A2000-07. Appendix C provides classification of MPAC codes that was used for analysis in the study.

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Land Demand and Supply Analysis

1.4 Report Contents

This report examines recent growth and changes in The Township, provides results of the growth forecasts and land supply review. Following this introductory section, the balance of this report is divided into five sections:

- Section 2 provides an overview of The Township
- Section 3 provides a demographic and economic profile of The Township discussing year-round housing, seasonal housing and employment lands at the neighbourhood level, as well as core emerging trends relevant for The Township
- Section 4 provides population, housing and employment forecasts as well as conversion of these forecasts to estimates of land demand in The Township
- Section 5 provides an estimation of the land supply in terms of available lands for development and potential for additional lot creation
- Section 6 provides a conclusion to the study

The Township of The Archipelago Land Demand and Supply Analysis

2.0 An Overview of The Township of The Archipelago

2.1 Brief History

The Township of The Archipelago was incorporated on April 1, 1980 after amalgamation of The Townships of Georgian Bay South Archipelago and Georgian Bay North Archipelago. The Townships of Georgian Bay South Archipelago and Georgian Bay North Archipelago were established on January 1, 1980, following the adoption of the District of Parry Sound Local Government Act. Parts of The Townships of Cowper and Conger were the basis for the south municipality – now the south area of The Township. The north area of The Township – north of Parry Sound beyond Carling Township – was composed of the Village of Pointe au Baril on the mainland, together with most of The Townships of Shawanaga and Harrison. The entire geographic area that is now The Township of The Archipelago was used by Indigenous peoples for hunting, fishing and gathering and other aspects of their traditional way of life. Metis people from Penetanguishene Bay were granted Crown lands in the late 1800s and early 1900s and continued their way of life in The Township.

The Township of The Archipelago is comprised of many islands in Georgian Bay and a number of inland, freshwater lakes, all of which are used for recreational purposes. The impetus for creating The Township originated from a strong desire by its inhabitants and the Province to preserve the natural environmental and recreational land use in the area. The Township is situated in the middle of the Georgian Bay Biosphere Reserve, designated by UNESCO as a world biosphere reserve.

2.2 Regional Context

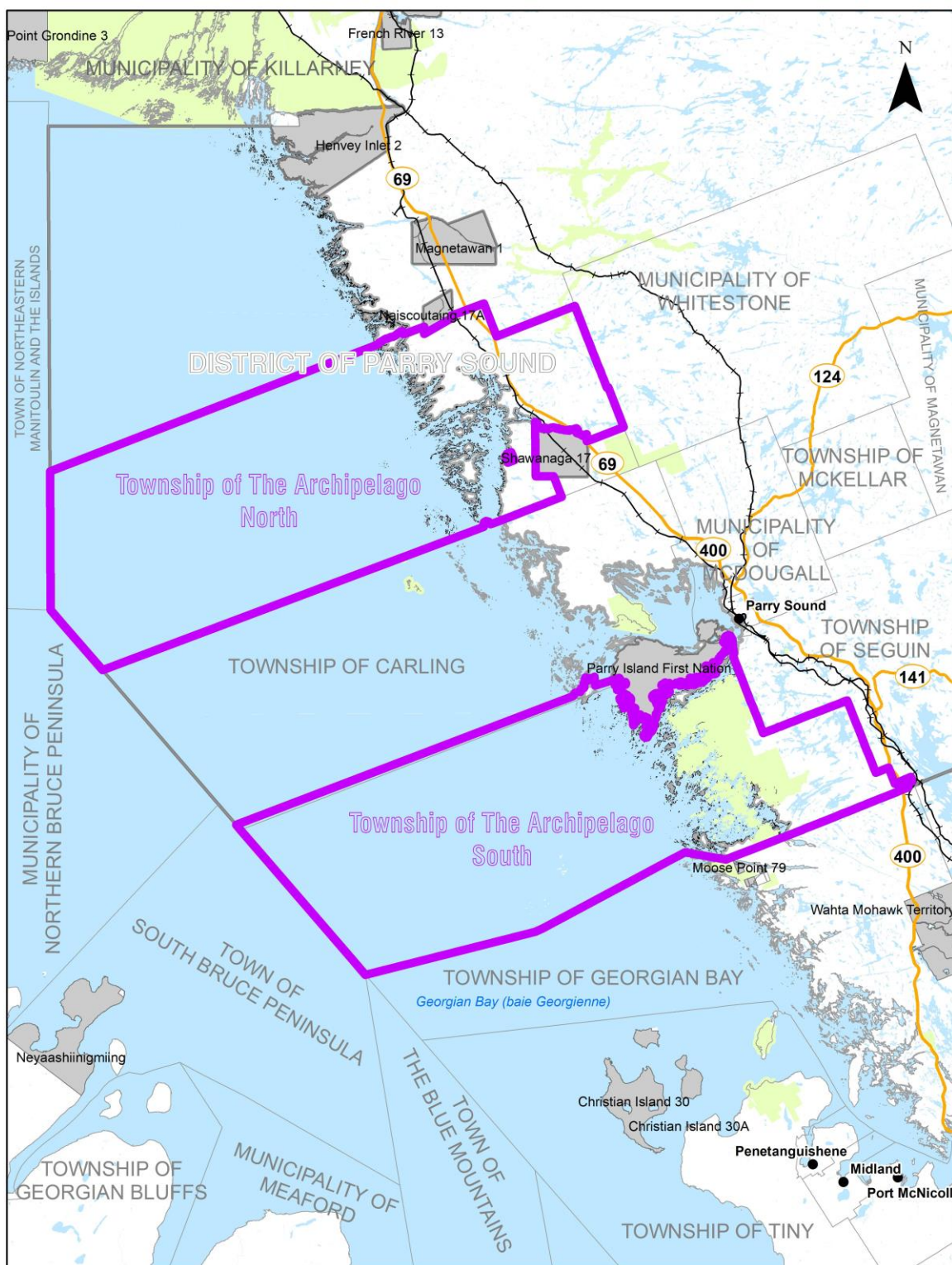
The Township of The Archipelago is situated within West Parry Sound in the District of Parry Sound in Northern Ontario (Figure 1). West Parry Sound comprises of the Town of Parry Sound, the townships of The Archipelago, Carling, Seguin and McKellar, the municipalities of McDougall and Whitestone, and the first nations of Wasauksing, Shawanaga, Magnetawan and Heavy Inlet.

The Township is a single-tier municipality with a unique geographical setting with it being split into the north and south areas. The distance from the south end of the south area to the north end of the north area is approximately 100 km and the two are separated by the Township of Carling, the Municipality of McDougall, the Town of Parry Sound, the Township of Seguin, and the Wasauksing First Nation.

Boundaries of municipalities on the shore extend out towards the centre of Georgian Bay and The Township, therefore, includes a substantial part of the famous Thirty Thousand Islands. The total land area of The Township of The Archipelago is approximately 58,926 ha (145,603 ac) and the many bays, rivers, lakes and water channels which constitute such an important part of The Township, cover an area about three times that size.

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Figure 1. Regional Context, The Township of The Archipelago



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2.3 Distinct Characteristics of The Township

2.3.1 Townships Goal to Preserve its Natural Environment

Section 3 of The Township's Official Plan provides the Goal for The Township and reads:

The general goal of the Official Plan of The Township of The Archipelago Planning Area is to preserve the unique and high quality of the natural environment which leads to a recreational experience that is both relaxing and aesthetically appealing to property owners and visitors who use the area, and is designed to make both property owners and visitors realize that they share equally in the responsibility of maintaining the ecological integrity within a UNESCO Biosphere Reserve.

Preserving the natural environment and maintaining the integrity within a UNESCO Biosphere Reserve is given precedence above all else within The Township of The Archipelago.

2.3.2 Crown lands and Patented lands

Much of the land area in The Township of The Archipelago is undeveloped and a large part is Crown Land. Overall, 87 percent or 51,092 ha (126,247 ac) of the land area in The Township is Crown lands while 13 percent or 7,833 ha (19,356 ac) of the land area is patented lands. In the south, 83 percent of the mainland and 70 percent of the islands remain in the public domain and in the north, 96 percent of the mainland and 50 percent of the islands remain in the public domain.

2.3.3 Year-round residents and Seasonal residents

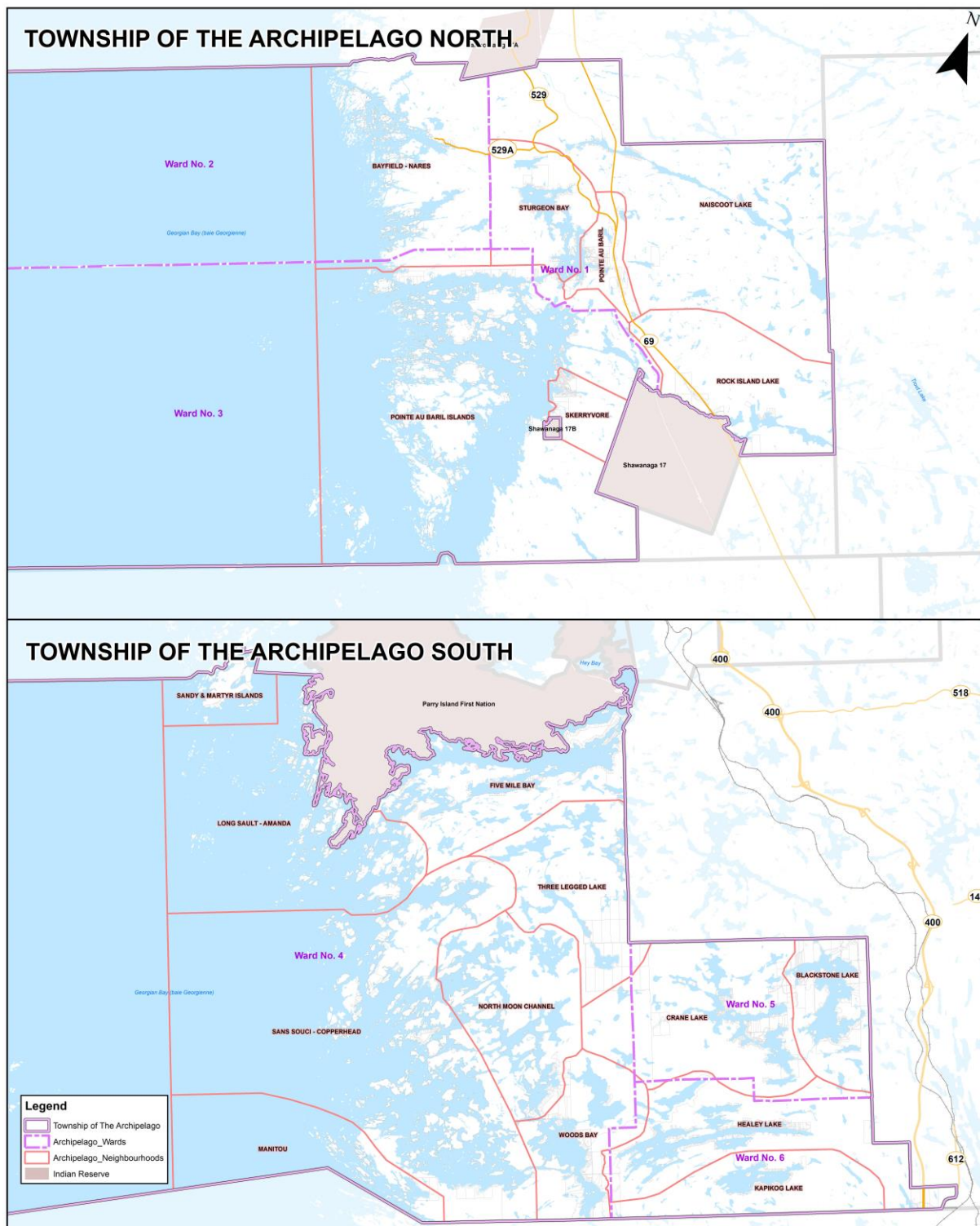
The year-round residents in The Township of The Archipelago comprise a small proportion of the total population of The Township. They are generally retired or fulfil a service function to the recreational users of The Archipelago. The seasonal residents in The Township make a significant proportion of the total population of The Township. There are varying types of seasonal residents in The Archipelago but with similar expectations and pursuits in terms of seeking recreation on the numerous inland lakes or Georgian Bay.

2.4 Neighbourhoods

The Township of The Archipelago includes a series of predominantly water-based neighbourhoods. All neighbourhoods have similar physical characteristics but also have their own distinct development patterns. The Township recognizes nineteen (19) neighbourhoods. Figure 2 provides an overview of the neighbourhoods split across North and South Archipelago.

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Figure 2. Neighbourhoods, The Township of The Archipelago



The Township of The Archipelago Land Demand and Supply Analysis

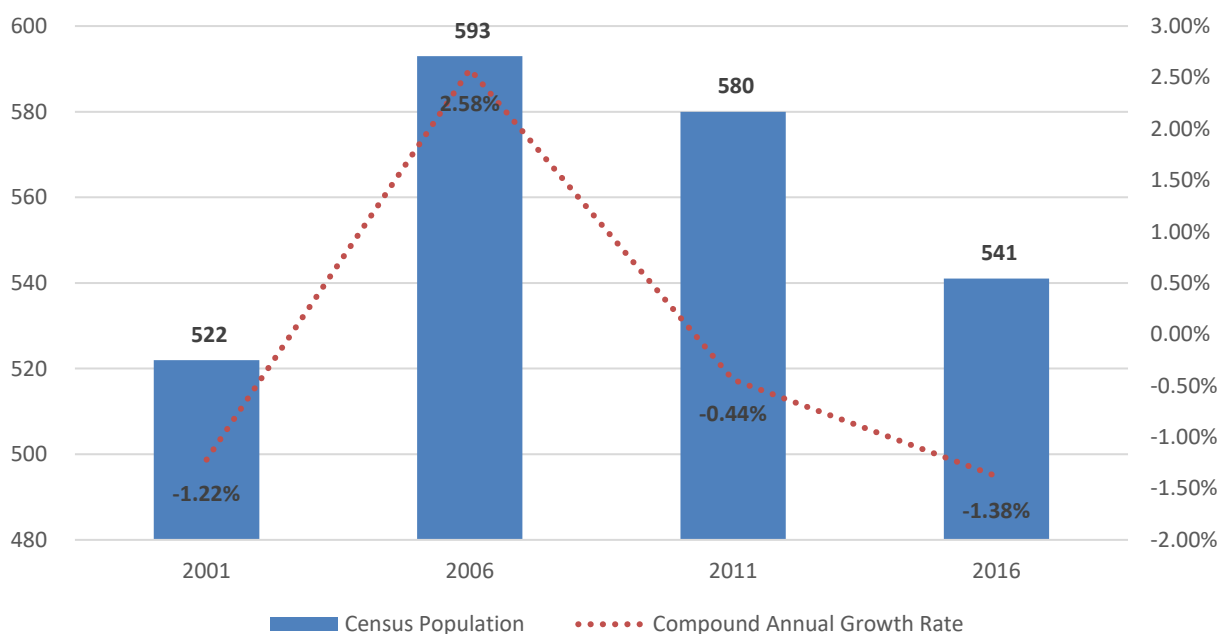
3.0 Demographic and Economic Profile of The Township

3.1 Demographic Trends

3.1.1 Year-Round Population

The Township of The Archipelago, which represents 1.23% of the District's year-round population, has witnessed a modest growth between 2001 and 2016. The Township's population grew by 19 year-round residents equating to a CAGR of 0.24% during the period. However, between 2006 and 2016 The Township saw a decline of 52 year-round residents equating to a CAGR of negative 0.91%. This trend is illustrated in Figure 3 below.

Figure 3. Year-Round Population Growth, The Township of The Archipelago, 2001-2016



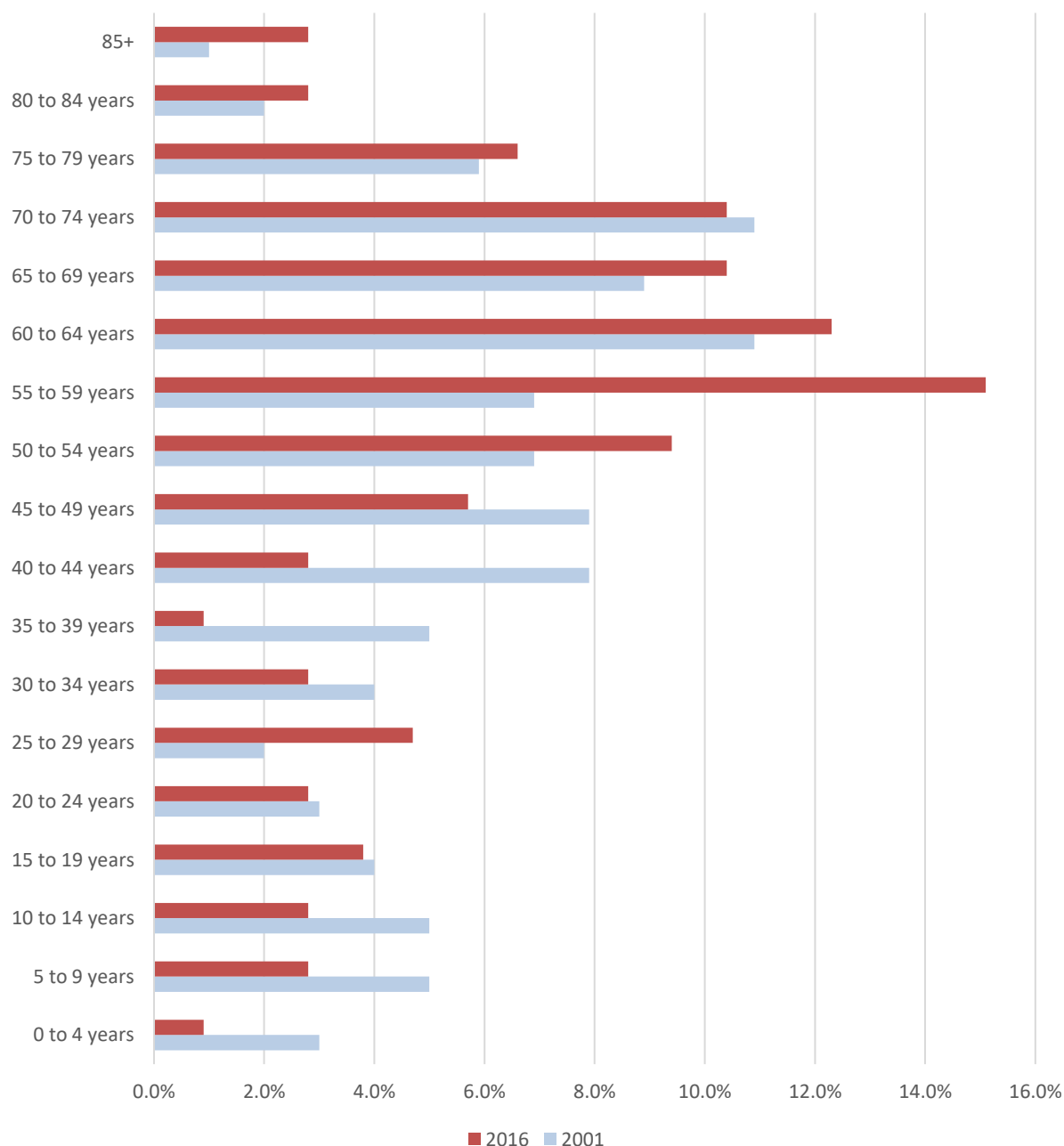
Source: JLR, using data from Statistics Canada

Note: Includes adjustments for Census net undercoverage

The Township of The Archipelago Land Demand and Supply Analysis

The Township of The Archipelago has an aging population, a trend occurring throughout Ontario and particularly in areas outside of the major urban centres. This is illustrated in Figure 4 below.

Figure 4. Age Structure, The Township of The Archipelago, 2001 and 2016



Source: JLR, using data from Statistics Canada

The Township of The Archipelago

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3.1.2 Year-round Housing

The year-round occupied dwellings in The Township have increased by 26 which equates to a compounded annual growth rate of 0.73% between 2001 and 2016. However, between 2011 and 2016 The Township witnessed a decrease in the number of year-round dwellings which equates to an annual decline of 0.55%. Table 2 below summarizes data from Statistics Canada illustrating this trend.

Table 2. Historical Year-round Occupied Dwellings, The Township of The Archipelago, 2001-2016

| Year | Year-round Occupied Dwellings | Net Change | CAGR |
|------------------|-------------------------------|------------|--------------|
| 2001 | 225 | - | - |
| 2006 | 254 | 29 | 2.45% |
| 2011 | 258 | 4 | 0.31% |
| 2016 | 251 | (7) | (0.55%) |
| 2001-2016 | - | 26 | 0.73% |

Source: JLR, using data from Statistics Canada

Note: Does not account for Census net undercoverage

Table 3 below illustrates trends in year-round dwellings in The Township based on MPAC parcel data. Barring data limitations, it shows that year-round occupied dwellings have increased at a moderate compounded annual growth rate of 0.50% between 2011 and 2016 Census years.

Table 3. Year-round Dwellings, The Township of The Archipelago, 2007-2020

| Year | Year-round Dwellings | Net Change | CAGR |
|-------------------------------------|----------------------|------------|--------------|
| 2007 | 229 | - | - |
| 2008 | 234 | 5 | 2.18% |
| 2009 | 235 | 1 | 0.43% |
| 2010 | 236 | 1 | 0.43% |
| 2011 | 236 | 0 | 0.00% |
| 2012 | 229 | (7) | (2.97%) |
| 2013 | 237 | 8 | 3.49% |
| 2014 | 236 | (1) | (0.42%) |
| 2015 | 251 | 15 | 6.36% |
| 2016 | 242 | (9) | (3.59%) |
| 2017 | - | - | - |
| 2018 | 231 | (11) | (2.30%) |
| 2019 | 227 | (4) | (1.73%) |
| 2020 | 229 | 2 | 0.88% |
| 2007-2020 | - | 0 | 0.00% |
| 2011-2016 (Census Years) | - | 6 | 0.50% |

Source: JLR, using MPAC parcel data provided by The Township of The Archipelago

Note: Data for 2017 not available, 2018 net change and CAGR is relative to 2016.

MPAC data may not correlate to data from Statistics Canada.

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The average household size in The Township of Archipelago has reduced over the past years corroborating with smaller families and aging population. The Township saw a compounded annual decline equating to 0.39% between 2001 and 2016 and had a household size of 2.12 (Table 4).

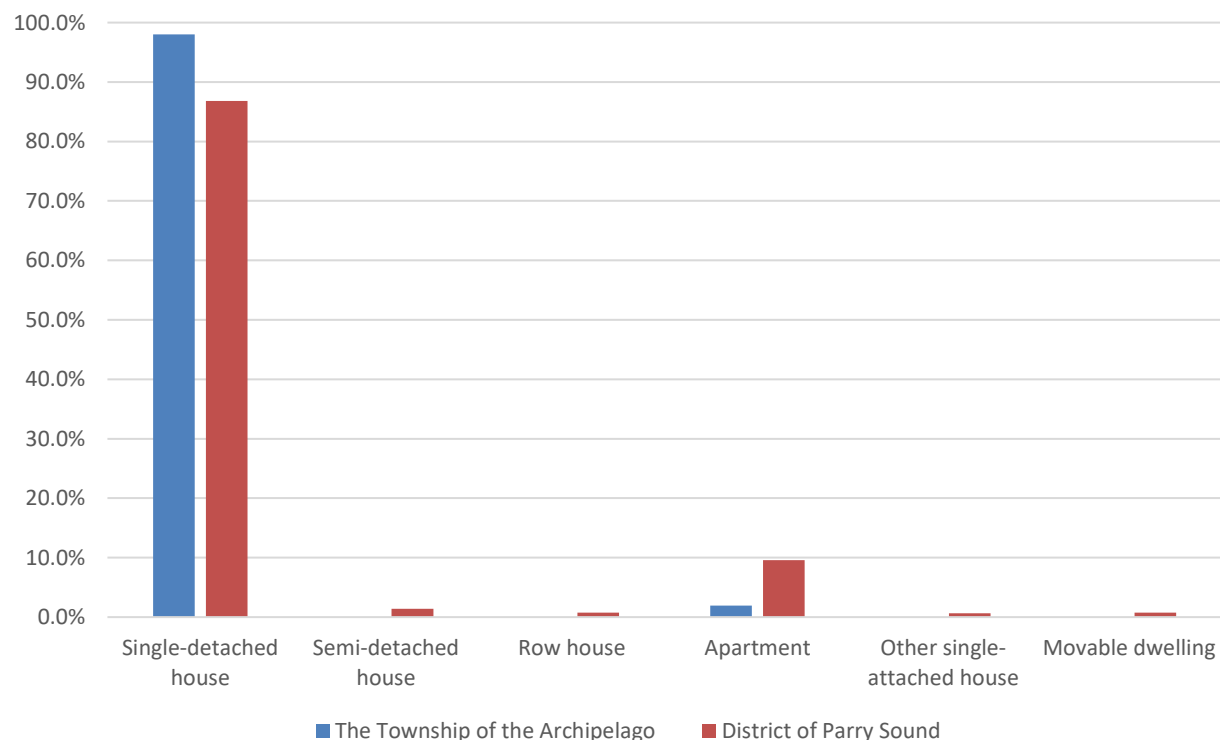
Table 4. Average Household Size, The Township of The Archipelago, 2001-2016

| Year | Household Size | CAGR |
|------------------|----------------|----------------|
| 2001 | 2.24 | - |
| 2006 | 2.27 | 0.21% |
| 2011 | 2.19 | (0.66%) |
| 2016 | 2.12 | (0.72%) |
| 2001-2016 | - | (0.39%) |

Source: JLR, using data from Statistics Canada

Figure 5 below shows the year-round housing mix for Census year 2016 in The Township of The Archipelago and the District of Parry Sound. Majority of houses in The Township are single-detached houses (98% of the total housing).

Figure 5. Year-round Housing Mix, The Township of The Archipelago and the District of Parry Sound, 2016



Source: JLR, using data from Statistics Canada

Note: Three different types of apartment structures (apartments with less than five storeys, apartments or flats in duplex and apartment with five or more storeys) have been combined into one category.

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3.1.3 Seasonal Housing

Seasonal population has played a defining role in The Township of The Archipelago. Although historic data capturing characteristics of seasonal population for The Township is not available, MPAC parcel data provides an insight to the trends in seasonal housing in The Archipelago.

Table 5 below illustrates the trends in seasonal dwelling units in The Township between 2007 and 2020. During the time period, there has been an increase of 110 seasonal dwelling units equating to a compounded annual growth rate of 0.28%. During the Census years of 2011 and 2016, the seasonal dwelling units increased by 43 units (0.29%). Although this increase is much higher than the change in year-round dwelling units in absolute terms, the compounded annual growth rate is higher for year-round dwelling units.

Table 5. Seasonal Dwelling Units, The Township of The Archipelago, 2007-2020

| Year | Seasonal Dwelling Units | Net Change | CAGR |
|-------------------------------------|-------------------------|------------|--------------|
| 2007 | 2953 | - | - |
| 2008 | 2959 | 6 | 0.20% |
| 2009 | 2966 | 6 | 0.24% |
| 2010 | 2980 | 14 | 0.47% |
| 2011 | 2996 | 16 | 0.54% |
| 2012 | 3009 | 13 | 0.43% |
| 2013 | 3007 | (2) | (0.07%) |
| 2014 | 3018 | 11 | 0.37% |
| 2015 | 3025 | 7 | 0.23% |
| 2016 | 3039 | 14 | 0.46% |
| 2017 | - | - | - |
| 2018 | 3053 | 14 | 0.23% |
| 2019 | 3058 | 5 | 0.16% |
| 2020 | 3062 | 4 | 0.16% |
| 2007-2020 | - | 110 | 0.28% |
| 2011-2016 (Census Years) | - | 43 | 0.29% |

Source: JLR, using data from MPAC Parcel Data provided by The Township of The Archipelago

Note: Data for 2017 not available, 2018 net change and CAGR is relative to 2016

Distinctive to The Township is the use of sleeping cabins as an additional form of seasonal housing. Sleeping cabins are not captured in the MPAC parcel data. Table 6 below shows number of building permits issued for year-round dwellings, seasonal dwellings, and sleeping cabins by The Township between 2005 and 2020. The Township has issued an average of 22.75 permits for sleeping cabins since 2005. The permits issued for sleeping cabins have however seen a compounded annual decline of 1.8% during the period.

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Table 6. Building Permits Issued Annually, The Township of The Archipelago, 2005-2020

| Year | Year-round Dwellings | Seasonal Dwellings | Sleeping Cabins |
|---------------------------------|-----------------------------|---------------------------|------------------------|
| 2005 | 1 | 28 | 34 |
| 2006 | 3 | 24 | 25 |
| 2007 | 3 | 22 | 26 |
| 2008 | 1 | 24 | 30 |
| 2009 | 3 | 16 | 23 |
| 2010 | 6 | 19 | 23 |
| 2011 | 0 | 20 | 21 |
| 2012 | 1 | 16 | 30 |
| 2013 | 1 | 13 | 14 |
| 2014 | 2 | 9 | 19 |
| 2015 | 1 | 17 | 25 |
| 2016 | 1 | 18 | 22 |
| 2017 | 3 | 16 | 17 |
| 2018 | 2 | 17 | 19 |
| 2019 | 2 | 22 | 23 |
| 2020 | 0 | 18 | 13 |
| 2005-2020 | 30 | 299 | 364 |
| 2006-2016 (Census Years) | 21 | 180 | 236 |

Source: JLR, using Building Permit data provided by The Township of The Archipelago

Note: Data does not correlate to data from MPAC

For the purposes of regulating land use, The Township makes no distinction between seasonal and year-round residences. Residential conversions are permitted in The Archipelago under Section 6.4 of the Official plan.

Table 7 below captures the annual housing conversion in The Township of The Archipelago since 2007. The table illustrates higher number of conversions from year-round to seasonal dwellings with an average of 5.25 per year compared to 3.33 conversions per year from seasonal to year-round dwellings in The Township since 2007.

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Table 7. Annual Housing Conversions, The Township of The Archipelago, 2007-2020

| Year | Conversion from Year-round to Seasonal Dwellings | Conversion from Seasonal to Year-round Dwellings |
|------|--|--|
| 2007 | - | - |
| 2008 | 2 | 3 |
| 2009 | 2 | 2 |
| 2010 | 3 | 5 |
| 2011 | 5 | 3 |
| 2012 | 11 | 4 |
| 2013 | 2 | 9 |
| 2014 | 4 | 4 |
| 2015 | 7 | 3 |
| 2016 | 8 | 0 |
| 2017 | - | - |
| 2018 | 14 | 4 |
| 2019 | 3 | 0 |
| 2020 | 2 | 3 |

Source: JLR, using data from MPAC Parcel Data provided by The Township of The Archipelago

Note: Data for 2017 is not available. Therefore, 2018 conversions are relative to 2016.

The above data only accounts for conversions from year-round to seasonal dwellings and vice-versa. There may be conversions to other uses which have not been included in the above table.

3.2 Employment Trends

To understand employment trends, it is important to distinguish between employment by place of residence and employment by place of work. Employment by place of residence, otherwise referred to as labour force, describes the employment patterns of those individuals residing within a jurisdiction and may in effect work elsewhere. On the other hand, employment by place of work refers to the number of individuals working within a jurisdiction and may in effect include individuals commuting from other areas to the jurisdiction for employment.

Labour force in the District of Parry Sound and The Township of The Archipelago has increased at a moderate pace between 2001 and 2016. Table 8 illustrates that although population aged 15 years and over has increased at a compounded annual growth rate of 0.74% for the District and 0.90% for The Township, the population in labour force has increased at a much slower pace. This is distinctive of aging economics. Further, labour force employed in The Township has increased at a relatively greater pace while labour force unemployed in The Township has seen a steep decline compared to the District.

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Table 8. Labour Force Characteristics, 2001-2016

| | The Township of The Archipelago | | | District of Parry Sound | | |
|-----------------------------------|---------------------------------|------|---------|-------------------------|--------|-------|
| | 2001 | 2016 | CAGR | 2001 | 2016 | CAGR |
| Population aged 15 years and over | 415 | 475 | 0.90% | 32,635 | 36,460 | 0.74% |
| In Labour Force | 210 | 225 | 0.46% | 18,975 | 20,065 | 0.37% |
| Employed | 185 | 220 | 1.16% | 17,630 | 18,195 | 0.21% |
| Unemployed | 30 | 10 | (7.06%) | 1,345 | 1,875 | 2.24% |

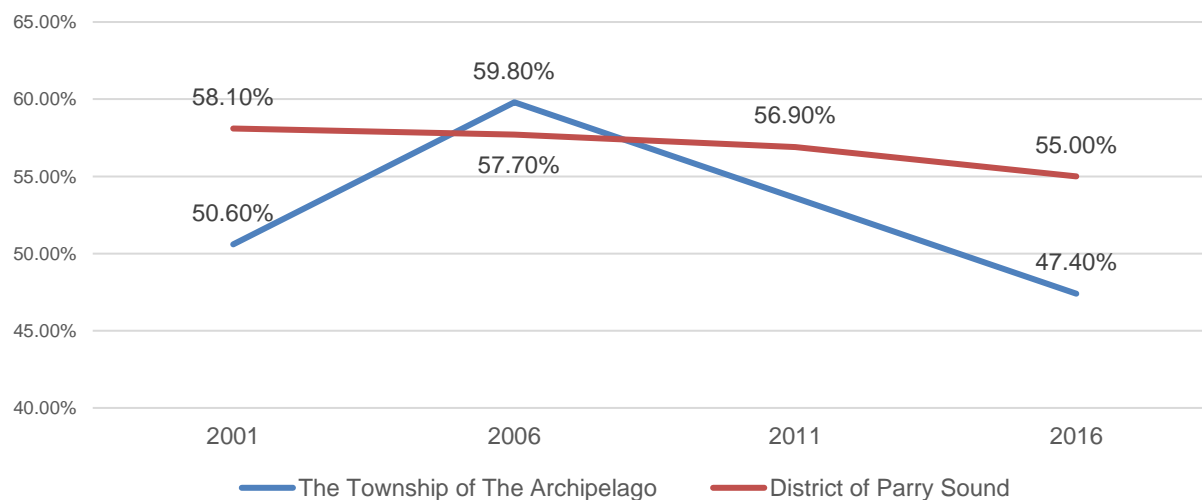
Source: JLR, using data from Statistics Canada and NHS

Note: Data for 2011 Census Year has been suppressed for The Township of The Archipelago.
Data may not add up due to rounding to nearest five's.

Figure 6, Figure 7 and Figure 8 illustrate the changes in participation rate, employment rate and unemployment rate respectively in The Township of The Archipelago and the District of Parry Sound. It is important to note that data for The Township has been suppressed for 2011 Census year and that data may not be accurate due to small size of The Township and rounding to nearest five's.

The participation rate in The Township has reduced from 59.8% in 2006 to 47.4% in 2016. At the same time, the participation rate in the District witnessed a much more moderate decline.

Figure 6. Participation Rate, 2001-2016



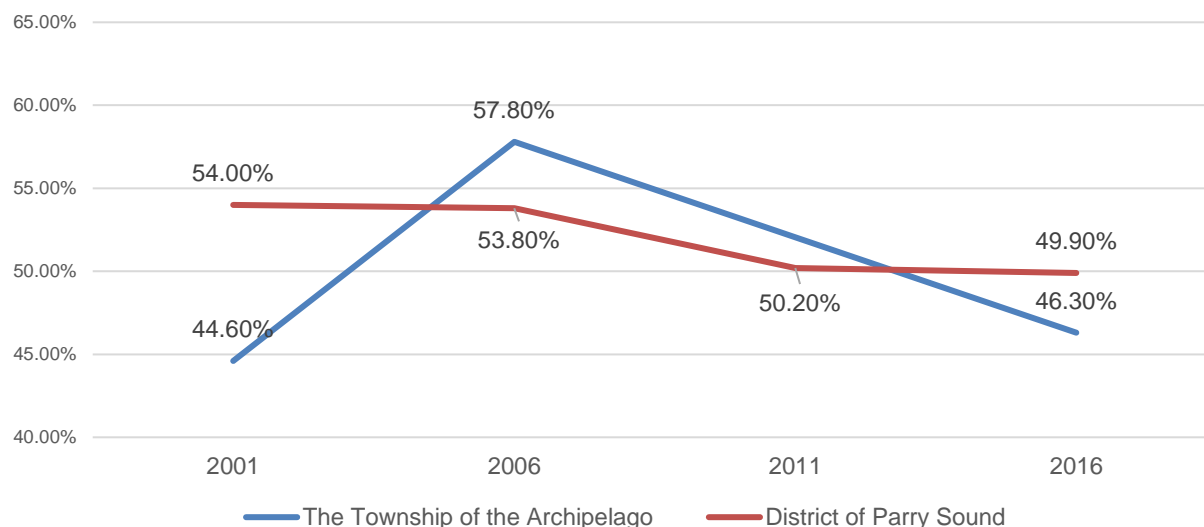
Source: JLR, using data from Statistics Canada and NHS

Note: Data for 2011 Census Year has been suppressed for The Township of The Archipelago

The employment rate in The Township reduced steeply from 57.8% in 2006 to 46.3% in 2016. At the same time, the employment rate in the District witnessed a relatively moderate decline. Decline between 2006 and 2011 is attributable to the 2008 financial recession.

The Township of The Archipelago Land Demand and Supply Analysis

Figure 7. Employment Rate, 2001-2016

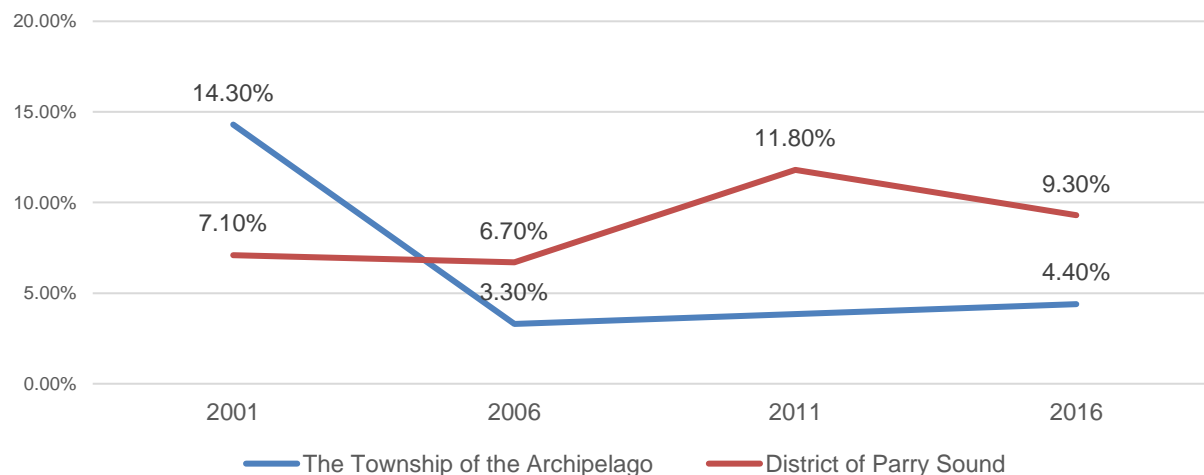


Source: JLR, using data from Statistics Canada

Note: Data for 2011 Census Year has been suppressed for The Township of The Archipelago

Between 2001 and 2006, the participation rate and employment rate in The Township increased while the unemployment rate declined steeply. This change may be attributed to an improved employment market in The Township. The unemployment rate in The Township has remained lower than the District average since 2006.

Figure 8. Unemployment Rate, 2001-2016



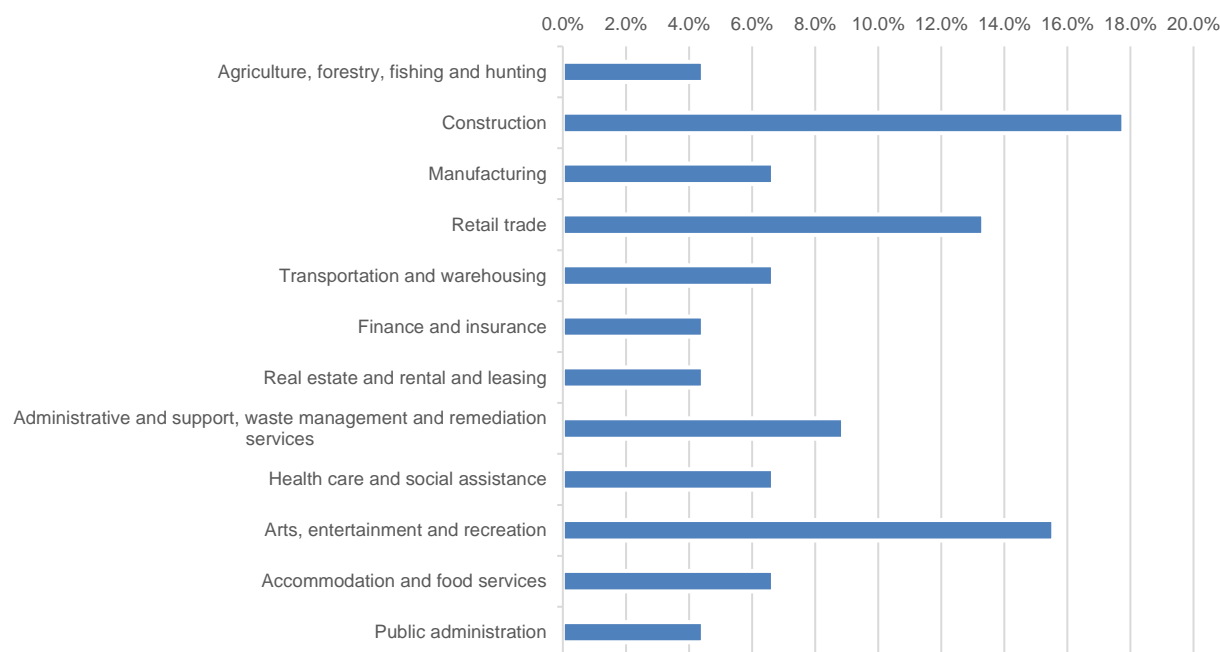
Source: JLR, using data from Statistics Canada and NHS

Note: Data for 2011 Census Year has been suppressed for The Township of The Archipelago

Figure 9 shows the place of work employment by North American Industry Classification System (NAICS) for The Township in 2016. Construction Industry had the highest employment (17.8%) followed by arts, entertainment and recreation industry (15.6%) and retail trade industry (13.3%).

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Figure 9. Place of Work Employment by NAICS, The Township of The Archipelago, 2016



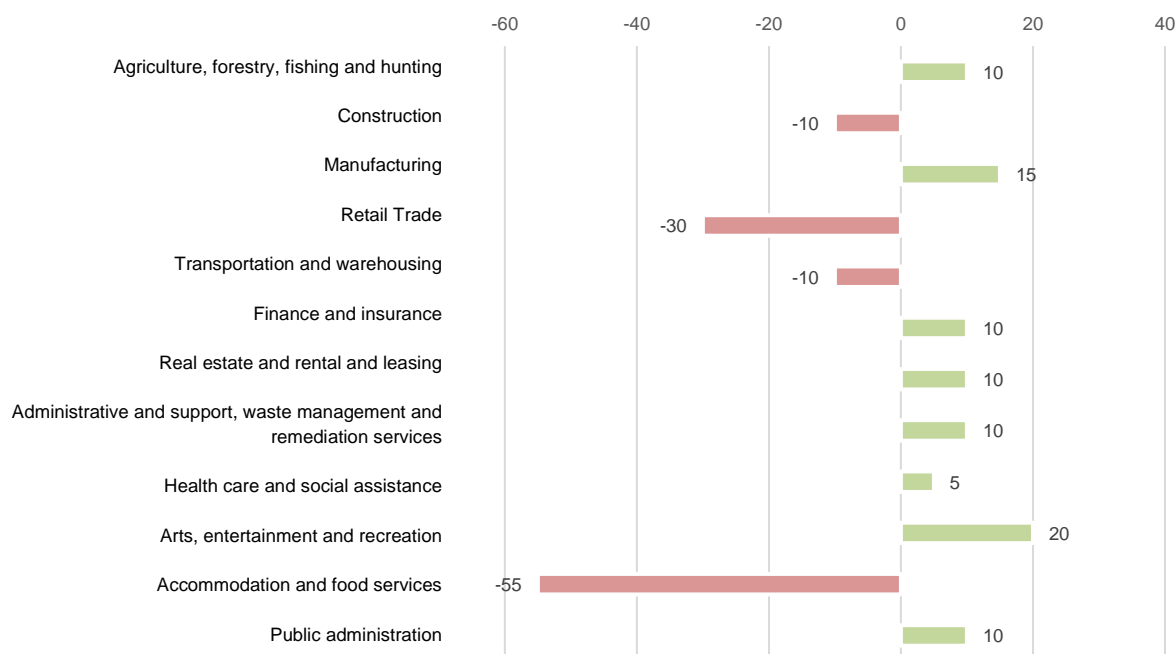
Source: JLR, using data from Statistics Canada and NHS

Note: Only classifications which had representation and witnessed a change during the period are shown.
Data inhibits inaccuracy due to small population size and rounding.

Figure 10 illustrates the change in place of work employment by NAICS for The Township between 2001 and 2016 Census years. The accommodation and food services industry was impacted the most during the period. This was followed by retail trade industry, construction industry, transportation and warehousing industry. Other industries saw an increase in employment. However, there was a net decrease of 25 place of work employment in The Township of The Archipelago during this period.

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Figure 10. Change in Place of Work Employment by NAICS, The Township of The Archipelago, 2001-2016



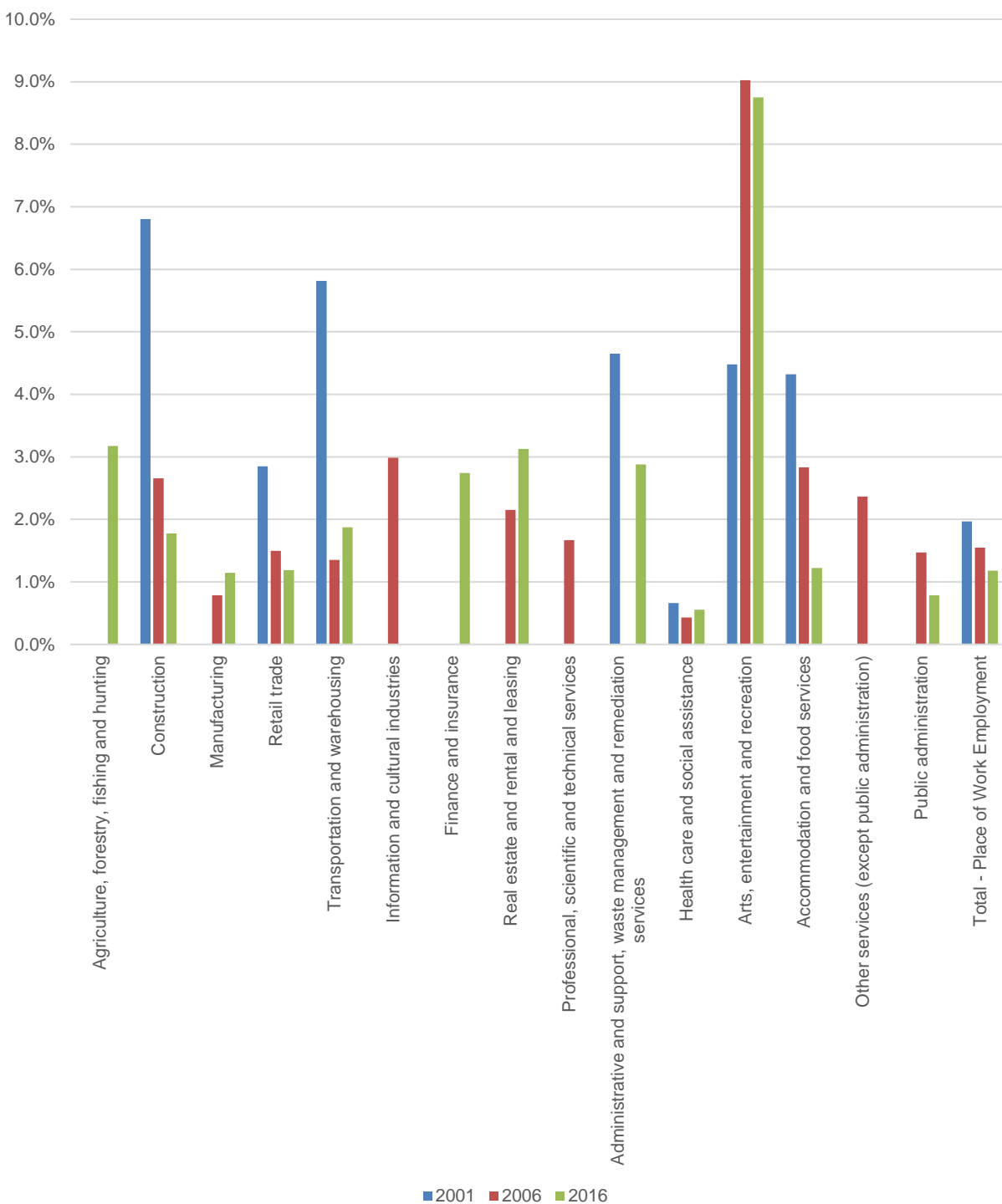
Source: JLR, using data from Statistics Canada and NHS

Note: Only classifications which had representation and witnessed a change during the period are shown.
Data involves inaccuracy due to small population size and rounding.

The share of The Township of The Archipelago's place of work employment in the District of Parry Sound has decreased between 2001 and 2016 Census years. Figure 11 illustrates this trend. Share of The Township's employment in the District is in line with the share of The Township's population in the District, which was approximately 1.2% in 2016 Census year. Arts, Entertainment and Recreation industry in The Township holds a high proportion of the total employment in the District. Construction Industry has seen the highest drop in share of The Township's place of work employment in the District.

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Figure 11. Change in Share of Place of Work Employment by North American Industry Classification System (NAICS), The Township of The Archipelago, 2001-2016



Source: JLR, using data from Statistics Canada and NHS

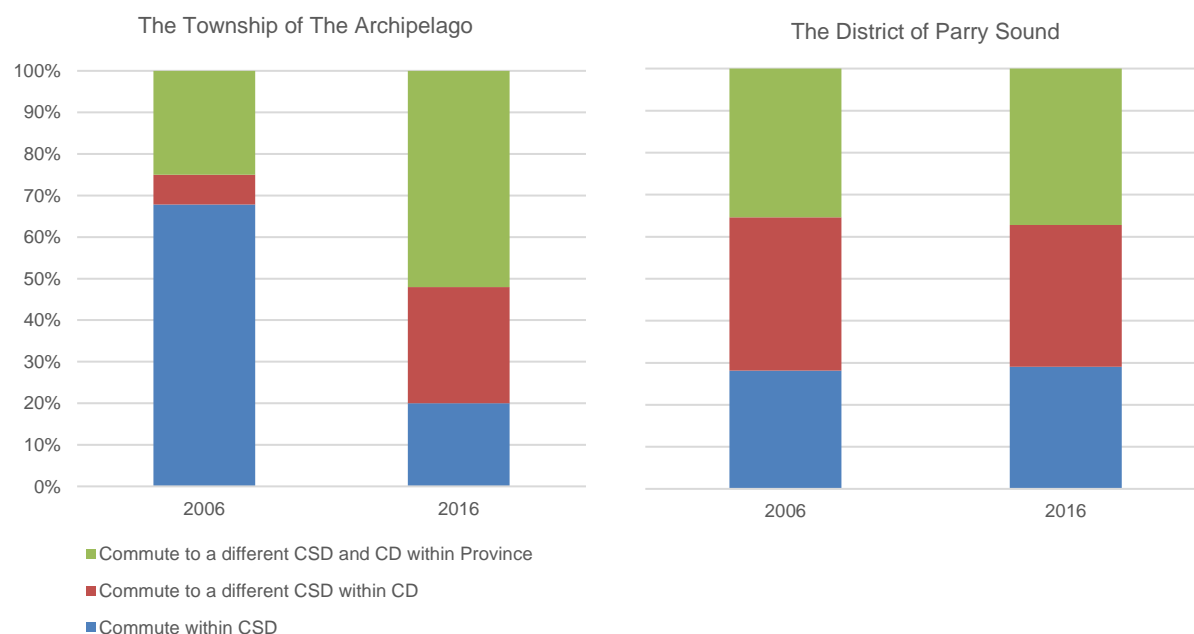
Note: Only classifications which had representation and witnessed a change during the period are shown.

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The commuting destination for the employed labour force is illustrated in Figure 12. There has been a considerable change in commuting patterns for The Township in between 2006 and 2016. In 2006, majority (over 65%) of the labour force commuted within The Township for work. However, this pattern changed in 2016 where majority of the population (over 50%) commuted to a different Census division within Ontario for work. District of Parry Sound witnessed a more consistent trend in commuting patterns.

Figure 12. Commuting destination for the employed labour force aged 15 years and over with a usual place of work, The Township of The Archipelago and District of Parry Sound, 2006-2016



Source: JLR, using data from Statistics Canada and NHS

Note: 2001 and 2011 data is not available

3.3 Neighbourhood Trends

This section provides an overview of the trends with respect to residential and employment lands within the different neighbourhoods of The Township of The Archipelago. MPAC parcel data and building permit activity is used to analyse the neighbourhood trends.

3.3.1 Year-round Residential Lands

Table 9 shows the number of lots in 2007 and 2020, the CAGR between the period, and the average area of the lots in 2020 that are assessed for year-round residential use by MPAC in each of the neighbourhoods in The Township. The total number of year-round residential lots have remained the same in the period. However, there has been an increase in some neighbourhoods and a decrease in others. These changes are attributable to either new lot creations, lot mergers, or conversion to other uses.

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Pointe au Baril, being the only recognized settlement area for The Township, has the highest number of year-round residential lots and has also witnessed a high increase (in absolute amounts) during the period. Pointe au Baril is followed by Skerryvore in North Archipelago and Healey Lake in South Archipelago in terms of the number of existing year-round residential lots.

The average area of the year-round residential lots in The Township is 2.4 ha (6 ac). It is considerably lower in North Archipelago compared to South Archipelago. Skerryvore has the smallest average year-round residential lot area.

Table 9. Year-round Residential Lots by Neighbourhood, The Township of The Archipelago, 2007-2020

| Area / Neighbourhood | Lots (2007) | | Lots (2020) | | CAGR (2007-2020) | Average Area (m ²) |
|--------------------------|-------------|---------------|-------------|---------------|---------------------|-----------------------------------|
| | # | % of total | # | % of total | | |
| North Archipelago | 138 | 60.3% | 147 | 64.2% | 0.49% | 8,731 |
| Bayfield - Nares | 6 | 2.6% | 6 | 2.6% | 0.00% | 10,731 |
| Naiscoot Lake | 1 | 0.4% | 1 | 0.4% | 0.00% | 4,533 |
| Pointe au Baril | 79 | 34.5% | 97 | 42.4% | 1.59% | 8,296 |
| Pointe au Baril Islands | 5 | 2.2% | 4 | 1.7% | (1.70%) | 26,709 |
| Rock Island Lake | 11 | 4.8% | 7 | 3.1% | (3.42%) | 24,767 |
| Skerryvore | 24 | 10.5% | 24 | 10.5% | 0.00% | 3,278 |
| Sturgeon Bay | 12 | 5.2% | 8 | 3.5% | (3.07%) | 6,369 |
| South Archipelago | 91 | 39.7% | 82 | 35.8% | (0.80%) | 49,753 |
| Blackstone Lake | 6 | 2.6% | 8 | 3.5% | 2.24% | 87,827 |
| Crane Lake | 9 | 3.9% | 12 | 5.2% | 2.24% | 98,602 |
| Five Mile Bay | 17 | 7.4% | 10 | 4.4% | (4.00%) | 6,406 |
| Healey Lake | 25 | 10.9% | 24 | 10.5% | (0.31%) | 54,887 |
| Kapikog Lake | 4 | 1.7% | 3 | 1.3% | (2.19%) | 4,735 |
| Long Sault-Amanda | 2 | 0.9% | 0 | 0.0% | (100.00%) | NA |
| Manitou | 2 | 0.9% | 0 | 0.0% | (100.00%) | NA |
| North Moon Channel | 2 | 0.9% | 1 | 0.4% | (5.19%) | 8,094 |
| Sandy & Martyr Islands | 1 | 0.4% | 0 | 0.0% | (100.00%) | NA |
| Sans Souci – Copperhead | 10 | 4.4% | 9 | 3.9% | (0.81%) | 17,118 |
| Three Legged Lake | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Woods Bay | 13 | 5.7% | 15 | 6.6% | 1.11% | 42,413 |
| Total | 229 | 100% | 229 | 100% | 0.00% | 24,144 |

Source: JLR, using MPAC Parcel Data provided by The Township of The Archipelago

Note: Average areas may be skewed due to one off large parcel sizes.

Table 10 summarizes the building permit activity for year-round residential dwellings between 2007 and 2020 by neighbourhood. Majority of the building permits for year-round residential dwellings were issued in North Archipelago, particularly within Pointe au Baril Station. Although building permit activity does not accurately correlate with MPAC parcel data, it is proportionately representative.

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Table 10. Building Permit Activity by Neighbourhood - Year-round Residential Dwellings, The Township of The Archipelago, 2007-2020

| Area / Neighbourhood | Building Permits (Year-round Residential) | |
|--------------------------|---|--------------|
| | # | % of total |
| North Archipelago | 16 | 61.5% |
| Bayfield - Nares | 0 | 0.0% |
| Naiscoot Lake | 0 | 0.0% |
| Pointe au Baril | 12 | 46.2% |
| Pointe au Baril Islands | 0 | 0.0% |
| Rock Island Lake | 0 | 0.0% |
| Skerryvore | 3 | 11.5% |
| Sturgeon Bay | 1 | 3.8% |
| South Archipelago | 10 | 38.5% |
| Blackstone Lake | 3 | 11.5% |
| Crane Lake | 0 | 0.0% |
| Five Mile Bay | 1 | 3.8% |
| Healey Lake | 2 | 7.7% |
| Kapikog Lake | 0 | 0.0% |
| Long Sault-Amanda | 0 | 0.0% |
| Manitou | 0 | 0.0% |
| North Moon Channel | 0 | 0.0% |
| Sandy & Martyr Islands | 0 | 0.0% |
| Sans Souci – Copperhead | 1 | 4.8% |
| Three Legged Lake | 0 | 0.0% |
| Woods Bay | 3 | 11.5% |
| Total | 26 | 100% |

Source: JLR, using Building Permit data provided by The Township of The Archipelago

3.3.2 Seasonal Residential Lands

Table 11 shows the number of lots in 2007 and 2020, the CAGR between the period, and the average area of the lots in 2020 that are assessed for seasonal residential use by MPAC in each of the neighbourhoods in The Township. The total number of seasonal residential lots have increased from 2,955 in 2007 to 3,065 in 2020. The increases in seasonal residential lands in the neighbourhoods are quite consistent in proportional terms.

South Archipelago has higher number of seasonal residential lots in The Township in contrast to lower number of year-round residential lots when compared to North Archipelago.

Pointe au Baril Islands (562) has the highest number of seasonal residential lots in The Township followed by Five Mile Bay (313), Sans Souci – Copperhead (296) and Healey Lake (295).

The average area of seasonal residential lots in The Township is 1.3 ha (3.2 ac), which is smaller than that for year-round residential lots. Similar to year-round residential lot sizes, seasonal residential lots are smaller in North Archipelago.

The average area of the year-round residential lots in The Township is 2.4 ha (6 ac). It is considerably lower in North Archipelago compared to South Archipelago. Skerryvore has the smallest average year-round residential lot area.

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Table 11. Seasonal Residential Lots by Neighbourhood, The Township of The Archipelago, 2007-2020

| Area / Neighbourhood | Lots (2007) | | Lots (2020) | | CAGR (2007-2020) | Average Area (m ²) |
|--------------------------|-------------|---------------|-------------|---------------|---------------------|-----------------------------------|
| | # | % of total | # | % of total | | |
| North Archipelago | 1181 | 40.0% | 1233 | 40.2% | 0.33% | 12,130 |
| Bayfield - Nares | 242 | 8.2% | 248 | 8.1% | 0.19% | 10,955 |
| Naiscoot Lake | 98 | 3.3% | 98 | 3.2% | 0.00% | 5,111 |
| Pointe au Baril | 49 | 1.7% | 53 | 1.7% | 0.61% | 7,087 |
| Pointe au Baril Islands | 533 | 18.0% | 562 | 18.3% | 0.41% | 15,577 |
| Rock Island Lake | 22 | 0.7% | 23 | 0.8% | 0.34% | 12,864 |
| Skerryvore | 99 | 3.4% | 107 | 3.5% | 0.60% | 10,882 |
| Sturgeon Bay | 138 | 4.7% | 142 | 4.6% | 0.22% | 8,096 |
| South Archipelago | 1774 | 60.0% | 1832 | 59.8% | 0.25% | 13,668 |
| Blackstone Lake | 113 | 3.8% | 117 | 3.8% | 0.27% | 28,547 |
| Crane Lake | 205 | 6.9% | 209 | 6.8% | 0.15% | 10,868 |
| Five Mile Bay | 304 | 10.3% | 313 | 10.2% | 0.22% | 7,853 |
| Healey Lake | 290 | 9.8% | 295 | 9.6% | 0.13% | 9,215 |
| Kapikog Lake | 109 | 3.7% | 112 | 3.7% | 0.21% | 5,761 |
| Long Sault-Amanda | 194 | 6.6% | 200 | 6.5% | 0.23% | 14,645 |
| Manitou | 51 | 1.7% | 55 | 1.8% | 0.58% | 14,660 |
| North Moon Channel | 83 | 2.8% | 87 | 2.8% | 0.36% | 11,854 |
| Sandy & Martyr Islands | 12 | 0.4% | 16 | 0.5% | 2.24% | 28,449 |
| Sans Souci – Copperhead | 288 | 9.7% | 296 | 9.7% | 0.21% | 16,125 |
| Three Legged Lake | 30 | 1.0% | 30 | 1.0% | 0.00% | 12,497 |
| Woods Bay | 95 | 3.2% | 102 | 3.3% | 0.55% | 31,729 |
| Total | 2955 | 100% | 3065 | 100% | 0.28% | 13,049 |

Source: JLR, using MPAC Parcel Data provided by The Township of The Archipelago

Note: Average areas may be skewed due to one off large parcel sizes.

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Table 12 summarizes the building permit activity for seasonal residential dwellings between 2007 and 2020 by neighbourhood. Majority of the building permits for seasonal residential dwellings were issued in South Archipelago. However, from a neighbourhood perspective, Pointe au Baril Islands have had the highest number of building permits issued for seasonal dwellings.

Table 12. Building Permit Activity by Neighbourhood - Seasonal Residential Dwellings, The Township of The Archipelago, 2007-2020

| Area / Neighbourhood | Building Permits (Seasonal Residential) | |
|--------------------------|---|--------------|
| | # | % of total |
| North Archipelago | 115 | 46.6% |
| Bayfield - Nares | 20 | 8.1% |
| Naiscoot Lake | 5 | 2.0% |
| Pointe au Baril | 9 | 3.6% |
| Pointe au Baril Islands | 63 | 25.5% |
| Rock Island Lake | 5 | 2.0% |
| Skerryvore | 8 | 3.2% |
| Sturgeon Bay | 5 | 2.0% |
| South Archipelago | 132 | 53.4% |
| Blackstone Lake | 2 | 0.8% |
| Crane Lake | 20 | 8.1% |
| Five Mile Bay | 18 | 7.3% |
| Healey Lake | 22 | 8.9% |
| Kapikog Lake | 8 | 3.2% |
| Long Sault-Amanda | 16 | 6.5% |
| Manitou | 3 | 1.2% |
| North Moon Channel | 7 | 2.8% |
| Sandy & Martyr Islands | 2 | 0.8% |
| Sans Souci – Copperhead | 18 | 7.3% |
| Three Legged Lake | 5 | 2.0% |
| Woods Bay | 11 | 4.5% |
| Total | 247 | 100% |

Source: JLR, using Building Permit data provided by The Township of The Archipelago

Note: Above data does not include sleeping cabins.

3.3.3 Employment Lands

Table 13 shows the number of lots in 2007 and 2020, the CAGR between the period, and the average area of the lots in 2020 that are assessed for employment use by MPAC in each of the neighbourhoods in The Township.

Pointe au Baril has the highest number of lots for employment use. Other neighbourhoods have limited employment lands. South Archipelago has seen a higher increase in number of lots for employment use between 2007 and 2020 with a compounded annual growth rate equating to 4.01%. Healey Lake Neighbourhood has seen the highest increase in employment lands. Home Occupations and Home Industry, as defined in the Comprehensive Zoning By-law A2000-07, are not captured in this data. These account for additional employment opportunities for The Township.

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Table 13. Employment Lots by Neighbourhood, The Township of The Archipelago, 2007-2020

| Area / Neighbourhood | Lots (2007) | | Lots (2020) | | CAGR (2007-2020) | Average Area (m ²) |
|--------------------------|-------------|---------------|-------------|---------------|---------------------|-----------------------------------|
| | # | % of total | # | % of total | | |
| North Archipelago | 26 | 74.3% | 29 | 65.9% | 0.84% | 35,473 |
| Bayfield - Nares | 2 | 5.7% | 3 | 6.8% | 3.17% | 19,209 |
| Naiscoot Lake | 1 | 2.9% | 1 | 2.3% | 0.00% | 4,127 |
| Pointe au Baril | 18 | 51.4% | 19 | 43.2% | 0.42% | 12,483 |
| Pointe au Baril Islands | 4 | 11.4% | 3 | 6.8% | (2.19%) | 18,521 |
| Rock Island Lake | 0 | 0.0% | 1 | 2.3% | NA | 656,845 |
| Skerryvore | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Sturgeon Bay | 1 | 2.9% | 2 | 4.5% | 5.48% | 8,680 |
| South Archipelago | 9 | 25.7% | 15 | 34.1% | 4.01% | 20,005 |
| Blackstone Lake | 1 | 2.9% | 2 | 4.5% | 5.48% | 4,856 |
| Crane Lake | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Five Mile Bay | 0 | 0.0% | 1 | 2.3% | NA | 19,992 |
| Healey Lake | 2 | 5.7% | 5 | 11.4% | 7.30% | 10,173 |
| Kapikog Lake | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Long Sault-Amanda | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Manitou | 2 | 5.7% | 2 | 4.5% | 0.00% | 74,381 |
| North Moon Channel | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Sandy & Martyr Islands | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Sans Souci – Copperhead | 3 | 8.6% | 3 | 6.8% | 0.00% | 10,144 |
| Three Legged Lake | 0 | 0.0% | 0 | 0.0% | NA | NA |
| Woods Bay | 1 | 2.9% | 1 | 2.3% | 0.00% | 20,153 |
| Total | 35 | 100% | 44 | 100% | 1.78% | 30,200 |

Source: JLR, using MPAC Parcel Data provided by The Township of The Archipelago

Note: Average areas may be skewed due to one off large parcel sizes.

3.4 Core Emerging Trends

Federal and Provincial level trends can play a defining role in the development of municipalities. Some of these trends which may have an impact to land demand and supply as related to this study are discussed below.

3.4.1 Federal Immigration Plans and Continued Urbanization

Immigration is important to Canada. Immigration, Refugees and Citizenship Canada (IRCC) has increased its immigration targets with 1.2 million immigrants to be invited between 2021 and 2023. The increased immigration target will continue to provide a source of growth for big cities particularly in the Greater Toronto Area (GTA) as they continue to urbanize. The continued growth and urbanization in the GTA may increase permanent and seasonal population in The Township over time, depending on other factors such as relative housing affordability and changes in work trends.

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3.4.2 Bill 108, More Homes, More Choice Act, 2019

On June 6, 2019, Bill 108, More Homes, More Choice Act, 2019 received Royal Assent. The Act contained changes to the Planning Act including amendments related to additional residential unit policies. Subsection 16(3) of the Planning Act was re-enacted to require official plans to contain policies authorizing additional residential units by authorizing two residential units in a house and by authorizing a residential unit in a building or structure ancillary to a house.

These changes are likely to open avenues for year-round as well as seasonal population but is more likely to cater to seasonal population in the case of The Township of The Archipelago through additional units in or outside of the principal dwelling. The land use planning implications of this provincial change should be considered by The Township and addressed in the Official Plan.

3.4.3 Covid-19 and Work from Home Culture

Covid-19 has had an impact on the global economy and has initiated a shift towards a work from home culture. Although it is early to predict the long-term impacts, initial expectation is a move from big cities to smaller municipalities with existing good quality infrastructure. Municipalities with existing water, wastewater, electricity, telecommunications, and emergency infrastructure in place are likely to witness growth in the short-term.

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4.0 Population, Housing & Employment Forecasts and Land Demand

This section provides a summary of the population, housing and employment forecasts for 25-year horizon from 2021 to 2046 and estimated land demand using appropriate conversion factors to provide a range for The Township's future growth outlook. Opportunities in relation to additional residential units have not been considered in estimating land demand to assess if growth needs can be accommodated on new lots for maximum requirement. Three scenarios were developed:

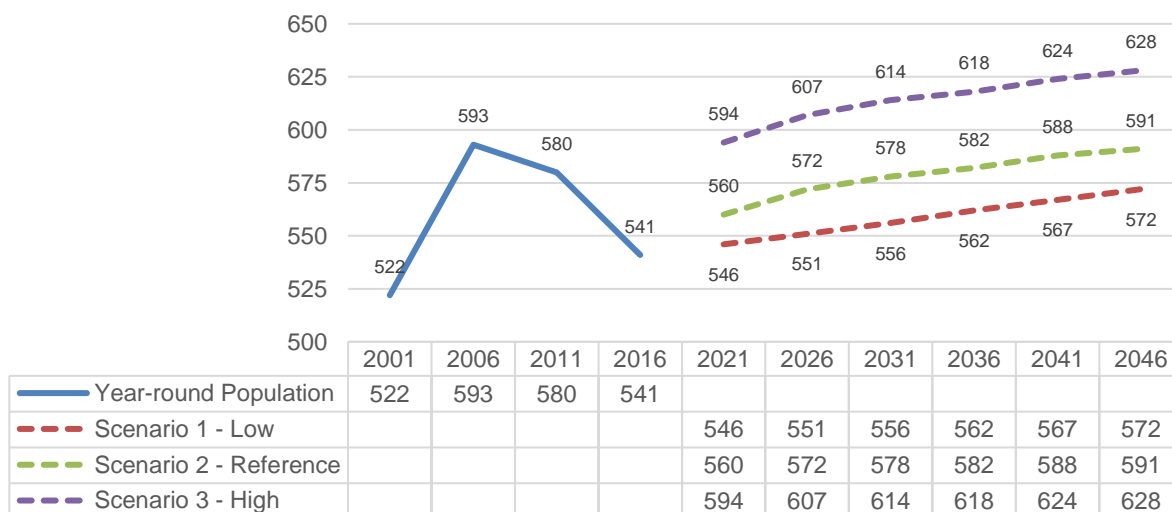
- Low – based on conservative estimates of growth
- Reference – based on more realistic estimates in consideration of the low and high scenarios
- High – based on aggressive estimates of growth

Refer to Appendix B for a detailed description of the methods used for forecasting and estimation of land demand.

4.1 Year-round Population and Household Forecast Scenarios

Three scenarios for year-round population forecasts were developed. Figure 13 illustrates these scenarios. Year-round population is anticipated to grow at an annual rate of 0.19% to 0.50%.

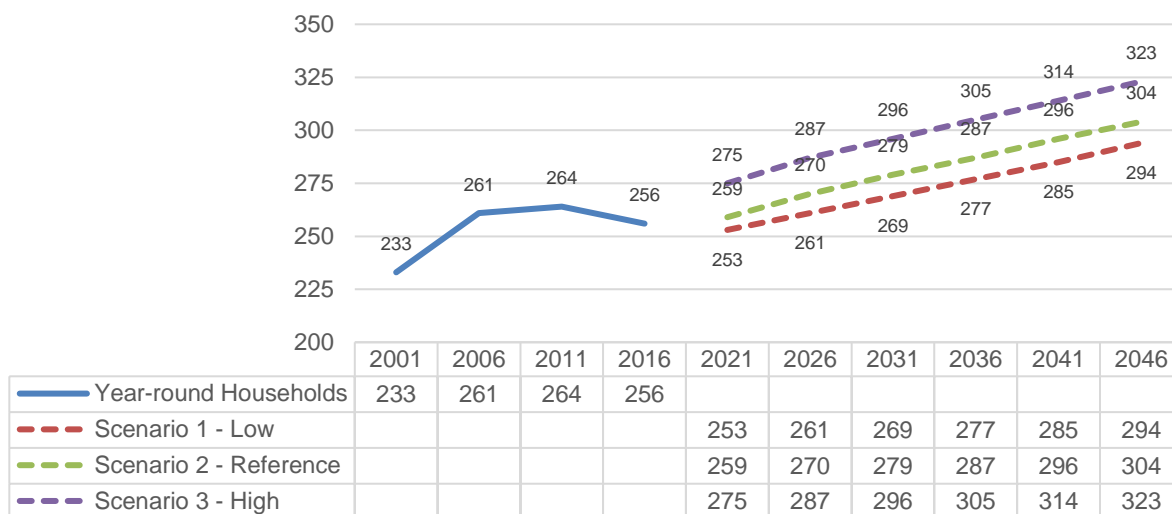
Figure 13. Year-round Population Forecasts, The Township of The Archipelago



Year-round household forecasts were developed converting the population forecasts to household forecasts. The household forecasts are illustrated in Figure 14. Year-round households are anticipated to grow at an annual rate of 0.46% to 0.77%.

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Figure 14. Year-round Household Forecasts, The Township of The Archipelago



4.2 Year-round Residential Land Demand

Table 14 illustrates the land demand in terms of additional lots required for year-round population forecasted for The Township of The Archipelago. This was estimated assuming that one year-round household requires one year-round residential lot. Opportunities in relation to additional residential units were not considered. It is anticipated that 38 to 67 additional lots will be required by 2046 to accommodate the year-round population in The Township.

Table 14. Year-round Residential Land Demand – Additional Lot Requirements, 2021-2046

| Households Growth | 2021 | 2026 | 2031 | 2036 | 2041 | 2046 | Total |
|------------------------|------|------|------|------|------|------|-----------|
| Scenario 1 – Low | (3) | 8 | 8 | 8 | 8 | 9 | 38 |
| Scenario 2 – Reference | 3 | 11 | 9 | 8 | 9 | 8 | 48 |
| Scenario 3 – High | 19 | 12 | 9 | 8 | 9 | 9 | 67 |

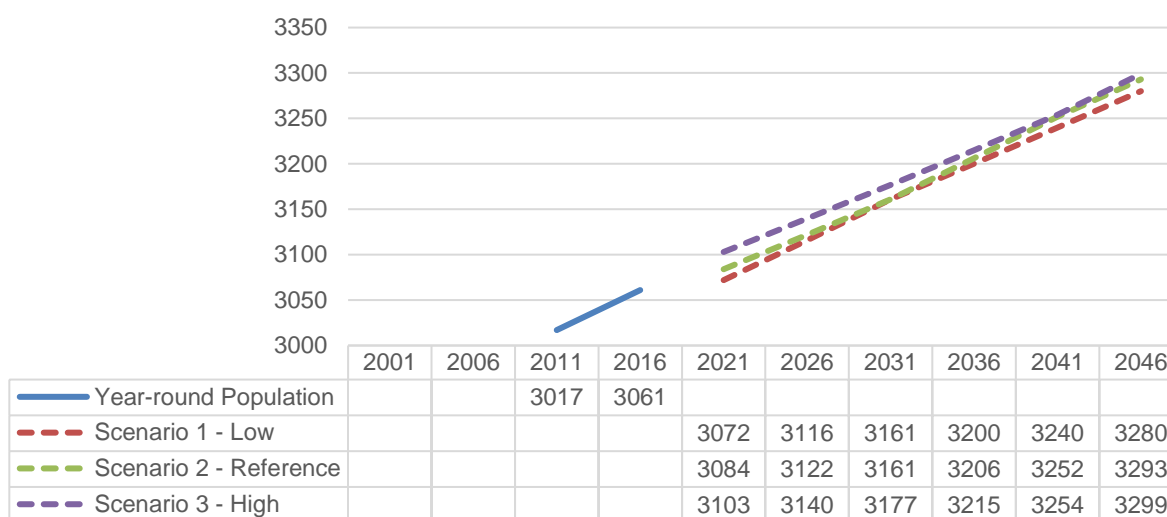
The Township of The Archipelago

Land Demand and Supply Analysis

4.3 Seasonal Household Forecasts

Figure 15 illustrates the seasonal household forecasts. Seasonal households in The Township are anticipated to grow at moderate growth rate of 0.23% to 0.25% annually.

Figure 15. Seasonal Household Forecasts, The Township of The Archipelago



4.4 Seasonal Residential Land Demand

Table 15 illustrates the land demand in terms of additional lots required for seasonal households forecasted for The Township of The Archipelago. It was assumed that one seasonal household will require one seasonal residential lot. An estimated 219 to 238 additional lots will be required by 2046 to accommodate the seasonal households in The Township.

Table 15. Seasonal Residential Land Demand – Additional Lot Requirements, 2021-2046

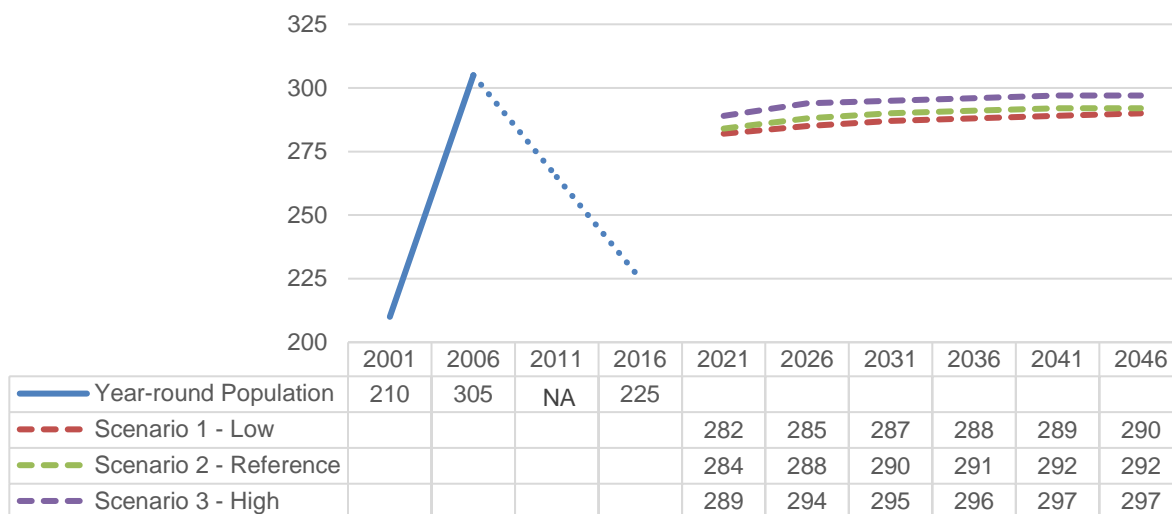
| Households Growth | 2021 | 2026 | 2031 | 2036 | 2041 | 2046 | Total |
|------------------------|------|------|------|------|------|------|------------|
| Scenario 1 - Low | 11 | 44 | 45 | 39 | 40 | 30 | 219 |
| Scenario 2 - Reference | 23 | 38 | 39 | 45 | 46 | 41 | 232 |
| Scenario 3 - High | 42 | 37 | 38 | 38 | 39 | 45 | 238 |

4.5 Employment Forecasts

Figure 16 illustrates the three scenarios developed for employment forecasts. The employment forecasts were estimated using the year-round population forecasts and trends in participation rates. Employment in The Township is expected to increase at a moderate pace of 0.11% to 0.12% annually.

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Figure 16. Employment Forecasts, The Township of The Archipelago



4.6 Employment Land Demand

Employment forecasts were converted to estimates of land demand taking Canadian business counts for Ontario as a proxy for The Township, assuming that no employer employs more than 50 people in The Township and one employer requires one lot for employment. Table 15 illustrates the land demand in terms of additional lots required for employment forecasted for The Township of The Archipelago. An estimated 14 to 16 additional lots will be required by 2046 (above the 2016 levels of 39 employment lots) to accommodate the forecasted employment in The Township. This represents a CAGR of 0.08% to 0.15% over the employment lands in 2016.

Table 16. Employment Land Demand – Additional Lot Requirements, 2021-2046

| Households Growth | 2021 | 2026 | 2031 | 2036 | 2041 | 2046 | Total |
|------------------------|------|------|------|------|------|------|-------|
| Scenario 1 - Low | 13 | 1 | 0 | 0 | 0 | 0 | 14 |
| Scenario 2 - Reference | 13 | 1 | 1 | 0 | 0 | 0 | 15 |
| Scenario 3 - High | 14 | 1 | 0 | 1 | 0 | 0 | 16 |

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5.0 Land Supply

This section discusses the current land available for development in The Township of The Archipelago considering various constraints to development and potential for lot creation through policies and provisions in The Township's Official Plan and the Zoning By-law. Refer to Appendix B for a detailed description of the methods used for estimating land supply in The Township.

5.1 Available Lands

MPAC parcel data for 2020 was analyzed to estimate number of lots that have an existing residential or employment use and lots which are vacant. Development constraints (detailed in Appendix B) were overlaid to estimate the number of vacant lots that are available for development.

Table 17 shows the number of lots being used for year-round residential, seasonal residential, and employment. It also shows the total number of lots that are vacant. This table excludes lots that are non-buildable or lots being used for other uses such as pits and quarries, open spaces, and utilities.

Table 17. Existing Lots by Neighbourhood, The Township of The Archipelago, 2020

| Area / Neighbourhood | Year-round Residential | Seasonal Residential | Employment | Vacant |
|--------------------------|------------------------|----------------------|------------|------------|
| North Archipelago | 147 | 1225 | 26 | 413 |
| Bayfield - Nares | 6 | 248 | 3 | 77 |
| Naiscoot Lake | 1 | 93 | 1 | 3 |
| Pointe au Baril | 97 | 53 | 16 | 51 |
| Pointe au Baril Islands | 4 | 562 | 3 | 198 |
| Rock Island Lake | 7 | 20 | 1 | 9 |
| Skerryvore | 24 | 107 | | 65 |
| Sturgeon Bay | 8 | 142 | 2 | 10 |
| South Archipelago | 82 | 1831 | 15 | 311 |
| Blackstone Lake | 8 | 117 | 2 | 32 |
| Crane Lake | 12 | 209 | | 43 |
| Five Mile Bay | 10 | 313 | 1 | 28 |
| Healey Lake | 24 | 294 | 5 | 14 |
| Kapikog Lake | 3 | 112 | | 2 |
| Long Sault-Amanda | | 200 | | 49 |
| Manitou | | 55 | 2 | 33 |
| North Moon Channel | 1 | 87 | | 9 |
| Sandy & Martyr Islands | | 16 | | 11 |
| Sans Souci – Copperhead | 9 | 296 | 3 | 65 |
| Three Legged Lake | | 30 | | |
| Woods Bay | 15 | 102 | 2 | 25 |
| Total | 229 | 3056 | 41 | 724 |

Source: JLR, using MPAC Parcel Data provided by The Township of The Archipelago

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Table 18 illustrates the total number of existing vacant lots and the lots available for development of these vacant lots. Considering the applicable development constraints, 202 (27.9%) of the total vacant lots are available for development in The Township.

Table 18. Available Lots for Development by Neighbourhood, The Township of The Archipelago, 2020

| Area / Neighbourhood | Vacant | Available |
|--------------------------|------------|------------|
| North Archipelago | 413 | 55 |
| Bayfield - Nares | 77 | 6 |
| Naiscoot Lake | 3 | |
| Pointe au Baril | 51 | 28 |
| Pointe au Baril Islands | 198 | 16 |
| Rock Island Lake | 9 | |
| Skerryvore | 65 | 3 |
| Sturgeon Bay | 10 | 2 |
| South Archipelago | 311 | 147 |
| Blackstone Lake | 32 | 15 |
| Crane Lake | 43 | 5 |
| Five Mile Bay | 28 | 19 |
| Healey Lake | 14 | 2 |
| Kapikog Lake | 2 | 2 |
| Long Sault-Amanda | 49 | 33 |
| Manitou | 33 | 5 |
| North Moon Channel | 9 | 6 |
| Sandy & Martyr Islands | 11 | 8 |
| Sans Souci – Copperhead | 65 | 43 |
| Three Legged Lake | | |
| Woods Bay | 25 | 9 |
| Total | 724 | 202 |

Source: JLR, using MPAC Parcel Data provided by The Township of The Archipelago

5.2 Additional Lands

Additional potential for development in The Township through lot creation was estimated. Township's Official Plan provides growth policies under Section 10 which is summarized in Appendix C of the Official Plan. Refer to Appendix B for detailed methods used for estimating potential for lot creation.

Table 19 summarizes the additional lots that can be created through severance from vacant lots and from currently developed lots that have an existing residential use. There is potential of creating 242 lots in The Township for further development.

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Table 19. Additional Lots for Development by Neighbourhood, The Township of The Archipelago, 2020

| Area / Neighbourhood | Additional Lots from currently Vacant Lots | Additional Lots from currently Developed Lots |
|--------------------------|--|---|
| North Archipelago | 13 | 116 |
| Bayfield - Nares | 1 | 23 |
| Naiscoot Lake | 0 | 0 |
| Pointe au Baril | 10 | 4 |
| Pointe au Baril Islands | 2 | 89 |
| Rock Island Lake | 0 | 0 |
| Skerryvore | 0 | 0 |
| Sturgeon Bay | 0 | 0 |
| South Archipelago | 16 | 97 |
| Blackstone Lake | 3 | 20 |
| Crane Lake | 0 | 0 |
| Five Mile Bay | 0 | 0 |
| Healey Lake | 0 | 0 |
| Kapikog Lake | 0 | 0 |
| Long Sault-Amanda | 3 | 52 |
| Manitou | 0 | 1 |
| North Moon Channel | 0 | 0 |
| Sandy & Martyr Islands | 0 | 0 |
| Sans Souci – Copperhead | 9 | 12 |
| Three Legged Lake | 0 | 0 |
| Woods Bay | 1 | 12 |
| Total | 29 | 213 |

Source: JLR, using MPAC Parcel Data provided by The Township of The Archipelago

5.3 Land Demand vs Land Supply

A comparison of land supply with land demand estimated for 2046 is shown in Table 20. This comparison illustrates that through available vacant lots for development and potential for additional lot creation, there is an adequate supply of land to cater to the land demand in The Township to 2046 and beyond.

Table 20. Land Demand vs Land Supply, The Township of The Archipelago

| | Year-round Residential Lots | Seasonal Residential Lots | Employment Lots | Total Lots |
|---|-----------------------------|---------------------------|-----------------|------------------|
| Total Demand by 2046 | 294 – 323 | 3280 – 3299 | 53 – 55 | 3627 – 3677 |
| Existing Lands | 229 | 3056 | 41 | 3326 |
| Net Demand by 2046 | 65 – 94 | 224 – 243 | 12 – 14 | 301 – 351 |
| Vacant lots available for development | | | | 202 |
| Additional lots from currently vacant lots available for development | | | | 29 |
| Additional lots from currently developed lots | | | | 213 |
| Total Land Supply | | | | 444 |

The Township of The Archipelago

Land Demand and Supply Analysis

6.0 Conclusion

This has presented results of population, housing and employment forecasts for The Township from 2021 to 2046 horizon. These forecasts have been prepared to assess the land needs for The Township. The land supply inventory has also been reviewed to assess the capacity to accommodate the residential and employment growth.

Key Conclusions:

- The Township of The Archipelago has witnessed relatively modest growth in year-round population between 2001 and 2016. However, between 2006 and 2016 The Township observed a decline in year-round population. Corresponding to the year-round population, the year-round housing growth outpaced population due to aging population and decline in average household size. There was a decline in year-round housing between 2011 and 2016.
- The Township has witnessed an increase in the number of seasonal dwellings and sleeping cabins between 2007 and 2020. There is also a net positive conversion from year-round residential to seasonal residential dwellings in The Township leading to a higher concentration of seasonal dwellings.
- The Township witnessed an overall moderate increase in employment between 2001 and 2016. However, this included a steeper decline in employment between 2006 and 2016 which is attributable to the global economic recession. The participation rate declined during the 2001-2016 period reflecting the aging demographics of The Township. The unemployment rate also declined significantly during this period.
- Three forecast scenarios were prepared – a low, reference and high outlook based on varied assumptions about future demographic and economic conditions in The Township. The reference scenario represents the most likely outcome for The Township based on our current understanding of economic and demographic trends affecting the pattern and pace of growth and development in The Township and in the District of Parry Sound.
- Under the reference forecast scenario, The Township of The Archipelago is anticipated to grow to a total year-round population of 591 in 2046, adding 50 year-round residents between 2016 and 2046.
- Housing growth is anticipated to out-pace population owing to the aging population trend and resulting decline in household size. The Township is forecast to add 48 year-round households between 2016 and 2046.
- Another 232 seasonal units are anticipated over the forecast horizon.
- Employment in The Township is forecasted to grow moderately over the forecast horizon to a 2046 total employment of 292, requiring an estimated 15 employment lots by 2046.
- A review of The Township's land supply inventory was undertaken, resulting in the identification of 202 vacant lots available for development and potential for the creation of

The Township of The Archipelago Land Demand and Supply Analysis

additional 242 lots through the current severance policies in the Official Plan. This is adequate to meet demand over the forecast horizon.

- South Archipelago has more vacant lots available for development (147) compared to North Archipelago (55)
- The land supply assessment indicates that there is enough land available to accommodate the anticipated residential and employment growth by 2046 in The Township. This assumes that property owners will take full advantage of the land use planning permissions regarding lot creation in the Official Plan and Zoning By-law.
- The forecasts which form the basis of this land demand and supply study should be monitored and updated at regular intervals, in-lieu of the inherent uncertainty in forecasting and the complexity of planning policy, demographic and economic factors which influences actual growth. Regular review and update based on the most currently available information will help ensure that The Township plans for growth in a sustainable manner over the long-term. The next update could take place as early as 2022 when Census 2021 data becomes available.

The Township of The Archipelago Land Demand and Supply Analysis

This report has been prepared for the exclusive use of The Township of The Archipelago, for the stated purpose. Its discussions and conclusions are summary in nature and cannot be properly used, interpreted or extended to other purposes without a detailed understanding and discussions with the client as to its mandated purpose, scope and limitations. This report was prepared for the sole benefit and use of The Township of The Archipelago and may not be used or relied on by any other party without the express written consent of J.L. Richards & Associates Limited.

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Appendix A

Land Use Planning Context

Land Use Planning Context

Prior to January 1st, 1980 the majority of the lands making up The Archipelago were subject to no land use controls while the Georgian Bay shoreline and islands were affected by a Minister's Order pursuant to The Public Lands Act.

Today, the land use planning framework for the Township is formed by the Planning Act, Provincial Policy Statement, the Growth Plan for Northern Ontario, the Official Plan for the Township of The Archipelago, the Township of the Archipelago Comprehensive Zoning By-law A2000-07 and other relevant laws, plans, policies, regulation and guidelines.

The relevant legislation and applicable policies to this land demand and supply analysis are discussed in subsequent sections.

Planning Act

The Planning Act (the Act) sets out the ground rules for land use planning in Ontario. It describes how land uses may be controlled, and who may control them. It promotes sustainable economic development in a healthy natural environment within a provincial policy framework and provides for a land use planning system led by provincial policy.

Section 2 of the Act speaks to matters of provincial interest. It reads:

The Minister, the council of a municipality, a local board, a planning board and the Tribunal, in carrying out their responsibilities under this Act, shall have regard to, among other matters, matters of provincial interest such as,

(h) the orderly development of safe and healthy communities;

(j) the adequate provision of a full range of housing, including affordable housing;

(k) the adequate provision of employment opportunities;

(p) the appropriate location of growth and development;

The Act requires that decision makers “have regard to” these matters of provincial interest to be integrated in their land use planning decision making. Therefore, analyzing the demand and supply of land for future growth becomes an integral part of laying down the land use planning framework for the Township.

Provincial Policy Statement

The Provincial Policy Statement (2020) (PPS 2020) was issued under Section 3 of the Planning Act which requires that land use planning decisions be consistent with the PPS 2020 that is in effect at the time of decision. The PPS 2020 came into effect on May 1, 2020.

The PPS provides policy direction on matters of provincial interest related to land use planning and development. It promotes appropriate development while protecting resources of provincial interest, public health and safety, and the quality of the natural and built environment, while integrating the principles of strong communities, a clean and healthy environment and economic growth, for the long term.

Section 1 - Building Strong Healthy Communities of the PPS 2020 provides policies for efficient land use and development patterns by promoting strong, liveable, healthy and resilient

communities, protecting the environment and public health and safety, and facilitating economic growth.

Following policies of the PPS 2020 speak to the importance of undertaking land demand and supply analysis and assessing the land gaps for current and future populations in municipalities. These policies are also important to consider while undertaking such studies.

1.1.1 Healthy, liveable and safe communities are sustained by:

a) promoting efficient development and land use patterns which sustain the financial well-being of the Province and municipalities over the long term;

b) accommodating an appropriate affordable and market-based range and mix of residential types (including single-detached, additional residential units, multi-unit housing, affordable housing and housing for older persons), employment (including industrial and commercial), institutional (including places of worship, cemeteries and long-term care homes), recreation, park and open space, and other uses to meet long-term needs;

c) avoiding development and land use patterns which may cause environmental or public health and safety concerns;

d) avoiding development and land use patterns that would prevent the efficient expansion of settlement areas in those areas which are adjacent or close to settlement areas;

e) promoting the integration of land use planning, growth management, transit-supportive development, intensification and infrastructure planning to achieve cost-effective development patterns, optimization of transit investments, and standards to minimize land consumption and servicing costs;

h) promoting development and land use patterns that conserve biodiversity; and

1.1.2 Sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 25 years, informed by provincial guidelines. However, where an alternate time period has been established for specific areas of the Province as a result of a provincial planning exercise or a provincial plan, that time frame may be used for municipalities within the area.

Within settlement areas, sufficient land shall be made available through intensification and redevelopment and, if necessary, designated growth areas.

Nothing in policy 1.1.2 limits the planning for infrastructure, public service facilities and employment areas beyond a 25-year time horizon.

Growth Plan for Northern Ontario

The Growth Plan for Northern Ontario, 2011 (Growth Plan), was prepared and approved under the Places to Grow Act, 2005, and came into effect on March 3, 2011. Municipal decisions on land use planning matters must conform with/not conflict with the Growth Plan.

The Growth Plan is a 25-year plan that provides guidance to align provincial decision-making and investment for economic and population growth in Northern Ontario. It contains policies to guide decision-making about growth that promote economic prosperity, sound environmental

stewardship, and strong, sustainable communities that offer northerners a high quality of life. It also recognizes that a holistic approach is needed to plan for growth in Northern Ontario.

The following policies, in Section 4 – Communities, of the Growth Plan talk about long-range planning for all communities and should be considered while undertaking studies such as the land demand and supply analysis that may impact the long-term community strategy development for communities.

4.2.1 All municipalities should, either individually, or collaboratively with neighbouring municipalities and Aboriginal communities, prepare long-term community strategies. These strategies should support the goals and objectives of this Plan, identify local opportunities to implement the policies of this Plan, and be designed to achieve the following:

- a. economic, social and environmental sustainability*
- b. accommodation of the diverse needs of all residents, now and in the future*
- c. optimized use of existing infrastructure*
- d. a high quality of place*
- e. a vibrant, welcoming and inclusive community identity that builds on unique local features*
- f. local implementation of regional economic plans, where such plans have been completed.*

4.2.2 Municipalities and planning boards are encouraged to:

- a. align their official plan policies with their long-term community strategies developed in accordance with Policy 4.2.1*
- b. employ the use of available tools to support and facilitate land-use planning that implements their long-term community strategies.*

Official Plan of the Township of the Archipelago

The Official Plan of the Township of the Archipelago (the Official Plan) first came in to effect on June 1, 1983. The Official Plan was recently updated and the updated changes came into effect on December 22, 2018.

The purpose of this Official Plan is to establish land use policies which guide development for the whole of The Archipelago Township and which provide for the long term use of land and water for public and private recreation in accordance with the goals and objectives set out for the Municipality.

Section 3 of the Official Plan provides the Goal of the Township and reads:

The general goal of the Official Plan of The Township of The Archipelago Planning Area is to preserve the unique and high quality of the natural environment which leads to a recreational experience that is both relaxing and aesthetically appealing to property owners and visitors who use the area, and is designed to make both property owners and visitors realize that they share equally in the responsibility of maintaining the ecological integrity within a UNESCO Biosphere Reserve.

Section 4 of the Official Plan provides the objectives necessary to fulfil the Official Plan Goal, the primary objective being:

- 1. Respecting, maintaining and improving the natural environment of the region, and of the UNESCO Biosphere Reserve, of which the Township is a part.*

There are eleven (11) secondary objectives in Section 4 of the Official Plan. Objectives relevant to this study are:

- 2. Responding appropriately to the inevitable social and economic changes that will affect the demand for recreation in its many forms while maintaining a status quo philosophy in regard to the character of the present land use base;*
- 4. Protect and preserve the water quality of the area;*
- 6. Ensuring the compatibility of land and water usage;*
- 8. Supporting those economic pursuits that are both complementary and necessary for the proper functioning of the recreational nature of the Municipality;*
- 9. Preserving the natural landscapes of the Township by minimizing obtrusive building forms, particularly in areas where exposure is high because of topographic conditions and/or the absence of tree cover;*
- 11. Avoiding land use patterns which may cause environmental or public health and safety concerns and recognizing the potential impact of climate change on these matters;*

With respect to Land Supply, Section 19 – Official Plan Review of the Township’s Official Plan states,

Prior to revising the Plan, Council will undertake a study in order to determine whether sufficient land is available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 20 years, including whether sufficient land is available in Pointe au Baril Station to serve as the focus of growth and development for the Township of The Archipelago.

The study will also determine whether there is a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses.

This land demand and supply analysis is required under Section 19 of the Official Plan and involves determining whether sufficient land is available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 20 years

For this study, Official Plan policies were considered to incorporate development constraints and possibility of new lot creations. The relevant policies in this perspective are noted here.

Section 5.4 of the Official Plan reads,

...The majority of lands and islands that make up the Township of The Archipelago are held in the name of the Crown and are generally undeveloped... It is understood that the present policy of the Ministry of Natural Resources and Forestry, the agency responsible for administering Crown land, is not to dispose of any land in the District of Parry Sound for further residential / cottaging development or recreational camps.

Section 7 of the Official Plan provides policies in relation to the cultural and natural heritage features, while Section 12 of the Official Plan provides policies in relation to natural resources. In summary, natural features and their ecological functions, cultural heritage, and archeological resources should be protected, conserved and enhanced.

Section 10 of the Official Plan provides neighbourhood growth policies for the Township. Appendix C of the Official Plan summarizes these neighborhood growth policies into a table for lot creation potential.

Section 14.4 of the Official Plan states,

All development in The Archipelago is to have frontage on a recreational waterbody. Consents that result in the creation of new lots or building permits will not be issued unless the lands front directly on a recreational waterbody or adjacent to an original shore road allowance. This policy does not apply to Pointe au Baril Station. Notwithstanding this policy, existing lots of record in Skerryvore and along Healey Lake Road including resources uses may be eligible for building permits subject to all other applicable policies of this Plan.

Section 14.12 of the Official Plan enables single owner islands that are zoned Natural State (NS) to apply for a zoning by-law amendment to rezone the island to a residential zone if the minimum area of the islands is at least 8100 square metres in area above the high water mark.

Comprehensive Zoning By-law A2000-07

The Township's Comprehensive Zoning By-law A2000-07 (the Zoning By-law) was passed by Council and came into force and effect on June 22, 2007.

Section 5 of the Zoning By-law has general provision that are applicable Township wide. Section 5.15 of the Zoning By-law states for Island Requirements,

Notwithstanding any other provision of this By-law to the contrary, a one owner island shall be deemed to comply to the lot area, frontage and depth requirements of this By-law if the island has an area of 4000 m² or more above the high water mark (176.44 metres G.S.C. above sea level) and is zoned for Residential use'; or a one owner island shall be deemed to comply to the lot area, frontage and depth requirements of this By-law if the island has an area of 8100 m² or more above the high water mark (176.44 metres G.S.C. above sea level) and is zoned 'Natural State (NS)' and is eligible under Official Plan policies for rezoning to a 'Residential Zone'.

Section 5.17 of the Zoning By-law provides for lot development requirements. Relevant to this study is Section 5.17 (b) which talks about frontage on public road or navigable waterway. It states,

No lot shall have built upon it a building for any purpose in any zone unless that lot abuts a public road or navigable waterway, except that where the lot existed at the date of passing of this By-law and such lot has a registered right-of-way or easement to a public road, on the date of passing of this By-law, the lot may be used for uses permitted in the applicable zone....

Section 5.22 of the Zoning By-law talks about non-complying lots, buildings and structure. 5.22 (a) states for non-complying lots – residential,

Notwithstanding anything contained in this By-law, a Residentially zoned lot in existence prior to the passage of this By-law, which is vacant or lacks development, may be used and buildings thereon may be erected provided that:

- i) the lot is held under a distinct and separate ownership from abutting lots on or before the date of passing of this By-law;*

- ii) *irrelevant provisions of the Planning Act, R.S.O. 1990, c.P. 13, have been complied with;*
- iii) *the lot has a minimum lot area and lot frontage of 1,800 m² and 30 metres, respectively;*
- iv) *the lot is adequately sized to accommodate a means of water supply and sanitary waste disposal. The determination of adequacy of a lot for development may require an on-site servicing report prepared by a qualified professional; and*
- v) *the use conforms to the By-law and any erection, enlargement, repair or renovation complies with all other provisions of this By-law.*

Notwithstanding Section 5.22 a) above of this By-law, where a consent to land severance was granted prior to the passage of this By-law, but the severed and retained parcels are not created until after the passage of this By-law, and the resultant parcel(s) lack the required lot area or lot frontage of the applicable zone, then the deficient parcels may be used and buildings thereupon erected, enlarged, repaired or renovated provided that clauses 5.22 a) ii) through v) inclusive are complied with.

Section 6 though Section 24 of the Zoning By-law provides Zone specific general use provisions and special exception regulations.

Section 3 of the Zoning By-law provides definitions to terms. Some terms that are relevant to this study and defined in the Zoning By-law are:

3.84 Home Occupation

Shall mean an occupation or business accessory to a legally established single detached dwelling with no show/display room, such as, but not limited to the following: a service (eg: accountant, lawyer) a carpentry shop, a metal working shop, a machine shop, a welding shop or a tool and die shop that provides services or wares. For the purposes of this By-law, the repairing of motor vehicles, mobile homes, trailers and/or boats is not a home occupation. A home occupation shall occur within the legally established single detached dwelling or within an accessory structure to the legally established single detached residence.

3.102 Lot, Frontage

Shall mean the following:

a) In the case of a single ownership island or a peninsula (lot with no side lot lines), the lot frontage shall be the distance of maximum separation between any two points on the boundary of the lot.

b) In the case where a lot fronts on a navigable waterway other than a single ownership island or peninsula, the lot frontage shall be the horizontal distance between the side lot lines measured along the front lot line, but where the front lot line is not a straight line, or where the side lot lines are not parallel, the lot frontage is to be measured either by a line equal to the minimum front yard setback measured back from and parallel to the chord of the lot frontage, or by the chord of the lot frontage, whichever is the greater. For the purpose of this paragraph the chord of the lot frontage is a straight line joining the two points where the side lot line intersects the front lot line.

c) In the case where a lot abuts a road but not a navigable waterway, the lot frontage shall be the horizontal distance between the side lot lines measured at right angles. Where the front lot line is not a straight line or where the side lot lines are not para

the lot frontage shall be measured from the minimum front yard setback and parallel to the chord of the lot frontage. For the purpose of this by-law, the chord is a straight line joining the two points where the side lot line intersects the front lot lines.

d) In the case where a lot has two separate frontages both on one or more navigable waterways, other than a single ownership island or a single ownership peninsula, the lot frontage shall be the longer of the two front lot lines and not calculated as cumulative. The lot frontage is calculated as the horizontal distance between the side lot lines measured along the front lot line, but where the front lot line is not a straight line, or where the side lot lines are not parallel, the lot frontage is to be measured either by a line equal to the minimum front yard setback measured back from and parallel to the chord of the lot frontage, or by the chord of the lot frontage, whichever is the greater. For the purpose of this paragraph the chord of the lot frontage is a straight line joining the two points where the side lot line intersects the front lot line

3.120 Non-Complying Lot

Shall mean a lot created prior to or after the passing of this By-law that does not meet the requirements of this By-law

3.157 Sleeping Cabin

Shall mean an accessory building designed and built for human habitation that excludes cooking facilities and is not made available for remuneration and is incidental and subordinate to the main dwelling.

Appendix B

Methodology & Assumptions

Approach

The approach for this study is to answer two overarching questions:

1. What is the total demand for land in the coming years in the Township of the Archipelago?
2. Is there adequate land supply for this forecasted demand in the Township of the Archipelago?

The study starts with an analysis of existing information relating to population, housing, employment, development application and building permit activity within the Township. This is done to understand the historic and emerging trends pertinent for this study.

The study then moves to estimating land demand and land supply. Further, an evaluation of land demand in relation to the land supply is done. The methodology adopted to estimate land demand and land supply are described in detail in subsequent sections.

Land Demand

The overall approach for estimating land demand involved a three-step process as illustrated in Figure 1.

Figure 1. Three-step approach to forecasting land demand for the Township of the Archipelago



First step involved overlaying multiple methods to forecast population, households, and employment. Forecasts for population, households and employment are normally based upon a cohort-survival forecast method. However, the forecast methods and assumptions were customized due to various limitations tied to the available data for the Township of the Archipelago. This step was undertaken to account for variability in available data.

Second step involved a rational analysis to carry forward or eliminate forecasted estimations through the multiple methods taken. Certain considerations were taken into account for logical reasoning where core trends included consideration of aggressive immigration plans, provincial push towards additional accessory units, and the growing work from home culture. This step resulted in low, reference and high forecast scenarios for the Township.

The final step involved converting the forecast scenarios of housing and employment into estimates of land demand.

The three steps were applied to estimate year-round residential, seasonal residential, and employment land demand. Specific methods are detailed further.

Year-round Residential Lands

Data available and considered to arrive at forecasts for year-round population included Census population and dwelling counts for the Township and the District, Statistics Canada population estimates for the Township and the District, and the Ministry of Finance population projections for the District.

Overlaying Forecast Methods

1. Past Censuses and Compounded Annual Growth Rate

CAGR's of the year-round population in Census years were calculated in intervals of five, ten and fifteen-year intervals. Average of these CAGRs was also taken. The CAGR's were used to forecast year-round population.

2. Proportional Share from District Population

Share of the Township's year-round population was analyzed to assess changes in respect to District's year-round population in the Census years. Minimum, maximum and average share of the Township in the District were applied to the Ministry of Finance projections to arrive at projections for the Township. In addition, changes over previous Census years in share of the population were calculated and applied to account for relatively slower growth of the Township in relation to the District.

3. Cohort Share of District Population

Building on the previous method, constant shares in the age cohorts for the Township in previous Census years and respective CAGR's were applied to the Ministry of Finance projections for the District for five-year age cohorts. Due to smaller size of the Township, the population spread in the age cohorts inhibited some inaccuracy due to data being rounded off to nearest five's. This method was therefore eliminated.

4. Building permit activity and conversion to year-round housing

Building permit activity for year-round housing and conversion to year-round housing were considered to check and capture changes in year-round population. However, it was observed that single family building permits issued over the years and changes to permanent population did not correlate with each other and changes in population as captured by Census.

Converting population forecasts to household forecasts

Average household size for the Township and the average CAGR was calculated by using five-, ten- and fifteen-year intervals during the Census years. Year-round population forecasts were converted to forecasts for year-round households using these trends and forecasted household size for the horizon period.

Converting household forecasts to estimates of land demand

It was assumed that one year-round household will require one year-round residential lot. Opportunities in relation to additional residential units were disregarded in this case in order to account for aggressive estimates for land demand.

Seasonal Residential Lands

Data on seasonal population is not available for the Township of the Archipelago. MPAC parcel fabric data and building permit activity for seasonal dwellings as provided by the Township was used to forecast seasonal housing. MPAC data was available from 2007 onwards. However, 2017 MPAC parcel fabric data was not available.

Overlaying Forecast Methods

1. MPAC Seasonal Housing

CAGR's for seasonal building permit activity was used to forecast seasonal housing. First, data for Census years was considered. However, this was only for 2011 and 2016. Therefore, data for all years that was provided by the Township was used to arrive at the seasonal housing forecasts.

2. MPAC Seasonal Housing, Building Permits for Sleeping Cabins

Building on the previous method, sleeping cabins data was included in the forecasting. CAGR's from previous years data were used to forecast seasonal housing.

3. Change in Seasonal Dwellings

Certain assumptions were made with respect to the core emerging trends. For instance, additional units will provide more avenues for seasonal population and induce an increase in seasonal population. Number of sleeping cabins being added annually and the change in this number over the years was considered as an additional opportunity. Additionally, it was assumed that conversion from seasonal to year-round housing will be in the short-term and the average number of conversions with its corresponding rate of decline was taken to arrive at the seasonal housing forecasts.

Converting household forecasts to estimates of land demand

It was assumed that one seasonal household will require one seasonal residential lot. Opportunities in relation to additional residential units were disregarded in this case in order to account for aggressive estimates for land demand.

Employment Lands

Data available and considered to arrive at forecasts for employment included employment data from Statistics Canada. Data for 2011 was suppressed.

Overlaying Forecast Methods

1. Participation rates with year-round population forecasts

Average participation rate and average CAGR's were calculated for 2001, 2006 and 2016 Census years. These were used to estimate employment forecasts which represented the labour force (place of residence employment) within the Township of the Archipelago.

2. Commuting destinations

Labour force forecasts in the previous step were converted to place of work employment forecasts using data related commuting which was only available for 2006 and 2016 Census years.

Proportion of people commuting within the Census subdivision for the District was taken as a proxy for the Township because of high uncertainty in data for the Township. Proportion of people commuting to a different Census subdivision within the Census division was taken for the Township of the Archipelago as a proportion of the Township's share of the population.

Proportion of commuting destinations were used to estimate population employed within the Township. This did not consider proportion of people coming from other Census divisions to work within the Township.

Converting employment forecasts to estimates of land demand

Canadian Business Register was used to convert employment forecasts to estimates of land demand. The Canadian Business Counts for Ontario were taken as a proxy for the Township of the Archipelago to arrive at estimates for employment land, assuming that one employer will require one lot for employment and no employer employs more than 50 people. Home Occupations and Home Industries were disregarded in this case to account for aggressive estimates for land demand.

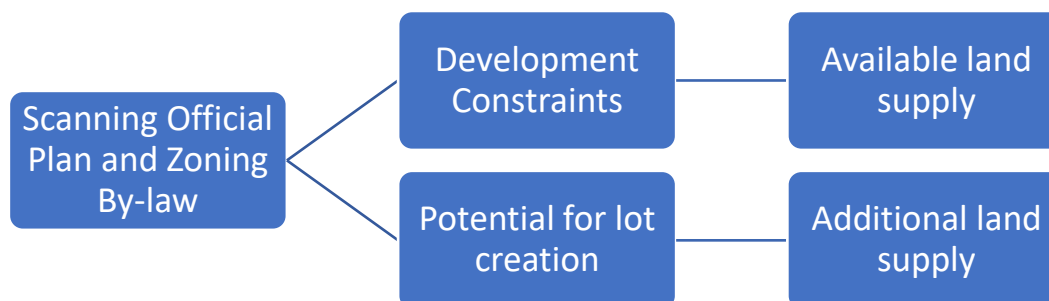
Land Supply

MPAC parcel data for 2020 as provided by the Township of the Archipelago as well as policies in the Official Plan and provisions in the Zoning By-law were evaluated to determine the land available for future development in the Township.

The approach adopted (illustrated in Figure 2) involved scanning the Official Plan and Zoning By-law to determine the development constraints and potential for creation of new lots in the Township. Basic GIS and excel analysis were used to arrive at the available land and additional land (through lot creations) for development in the Township. Overall, restrictive approach was considered in relation to development constraints and potential for lot creation in order to arrive at conservative estimates.

Further, the available and additional land supply analysis was undertaken at the neighbourhood level to check adequacy of land supply in relation to overall forecasted land demand.

Figure 2. Approach to estimating land supply in the Township of the Archipelago



Development Constraints

The Township's Official Plan and Zoning By-law were analyzed to determine constraints for development. Table 1 summarizes the applicable sections of the Official Plan and the Zoning By-law and the respective considerations for development constraints.

Table 1. Applicable Sections of the Official Plan and Zoning By-law for consideration towards development constraints

| Official Plan | Zoning By-law | Consideration for Development Constraints |
|-------------------------|------------------------------------|--|
| Section 5.4 | | Crown lands not available for further residential/cottage development in the District of Parry Sound. |
| Section 7 Section 12 | Section 16, 17, 18, 19, 20, 23, 24 | Various development constraints on lots with dominant zone as Natural State (NS), Natural State Conservation (NSC), Environmentally Sensitive (ES), ES-1, ES-2, Pit and Quarry (PIT), and Waste Disposal (WD). |
| Section 14.12 | Section 5.15 | Single owner islands that are zoned NS and have area of more than 8,100 sqm are eligible for rezoning to a residential zone. |
| Section 14.4 | Section 5.17 (b) | All development in the Township is to have frontage on a recreational waterbody, except those in Pointe au Baril Station, and existing lots of record in Skerryvore and Healey Lake Road. |
| | Section 5.15 | Single owner islands that are zoned for residential use and have an area of less than 4,000 sqm are deemed to comply with lot requirements. |
| | Section 5.22 (a) | Existing lots that are zoned for residential use and have a minimum lot area of 1,800 sqm and frontage of 30 metres may be used for development. |

Based on the considerations summarized in Table above, following actions were taken to overlay the development constraints –

1. Removing crown lands and municipal/provincial owned lands

2. Removing land owned by entities such as Bell Canada, Canadian Pacific Railway, Georgian Bay Land Trust
3. Removing following Zones -
 - Natural State Conservation (NSC) Zone
 - Environmentally Sensitive (ES) Zone
 - Pit and Quarry (PIT) Zone
 - Waste Disposal (WD) Zone
 - Natural State (NS) Zone
4. Removing all Commercial Zones, considering low likelihood of commercial properties to come into the land supply -
 - Marina Commercial (MC) Zone
 - Resort Commercial (RC) Zone
 - Marina/Resort Commercial (MRC) Zone
 - General Employment Commercial (EC) Zone
 - Contractor Commercial (CC) Zone
 - Private Club (PC) Zone
5. Removing properties already divided (with 'D' symbol)
6. Removing following Zones on conditional basis -
 - Coastal/Island Residential (CR), Inland Lakes Residential (IR), and General Residential (GR) Zone -
 - Vacant lots less than 1800 sqm or having a frontage of less than 30 metres
 - Single ownership islands with less than 4,000 sqm in area above the high-water mark
7. Removing all properties that do not have frontage on a recreational waterbody except -
 - Properties in Pointe au Baril Station
 - Existing lots of record in Skerryvore
8. Adding following Zones -
 - Single ownership islands in Natural State (NS) Zone with at least 8100 sqm in area above the high-water mark
 - Existing Use (EU) Zone

Potential for Lot Creation

Section 10 of the Official Plan provides neighbourhood growth policies for the Township. Appendix C of the Official Plan summarizes these neighbourhood growth policies into a table for lot creation potential. This summary is provided in table below.

Table 2. Summary of Neighbourhood Growth Policies, The Township of the Archipelago

| Neighbourhood | OP Section | Number of New Lots Permitted | Minimum Lot Size Required to be Eligible to Apply for Severance |
|-------------------------|------------|------------------------------|---|
| Bayfield - Nares | 10.6 | 1 | 2 hectares |
| Pointe au Baril Islands | 10.9 | 1 | 2 hectares |
| | | 2 | 10 hectares |
| | | 3 | 15 hectares |
| | | 4 | 20 hectares |
| Sturgeon Bay | 10.13 | 0 | N/A |

| Neighbourhood | OP Section | Number of New Lots Permitted | Minimum Lot Size Required to be Eligible to Apply for Severance |
|--------------------------|------------|------------------------------|---|
| Manitou | 10.19 | 1 | 5 hectares |
| Sandy and Martyr Islands | 10.21 | 0 | N/A |
| Long Sault - Amanda | 10.25 | 1 | 2 hectares |
| | | 2 | 3 hectares |
| | | 3 | 10 hectares |
| Five Mile Bay | 10.28 | 0 | N/A |
| Sans Souci - Copperhead | 10.3 | 1 | 5 hectares |
| | | 2 | 10 hectares |
| | | 3 | 15 hectares |
| | | 4 | 20 hectares |
| North Moon Channel | 10.32 | 0 | N/A |
| Woods Bay | 10.34 | 1 | 2 hectares |
| | | 2 | 5 hectares |
| | | 3 | 15 hectares |
| Blackstone Lake | 10.37 | 1 | 2 hectares |
| | | 2 | 3 hectares |
| | | 3 | 4 hectares |
| Crane Lake | 10.4 | 0 | N/A |
| Healey Lake | 10.42 | 0 | N/A |
| Kapikog Lake | 10.44 | 0 | N/A |
| Naiscoot Lake | 10.46 | 0 | N/A |
| Rock Island Lake | 10.48 | 0 | N/A |
| Thee Legged Lake | 10.5 | 0 | N/A |

Source: Appendix 'C', Official Plan of the Township of the Archipelago

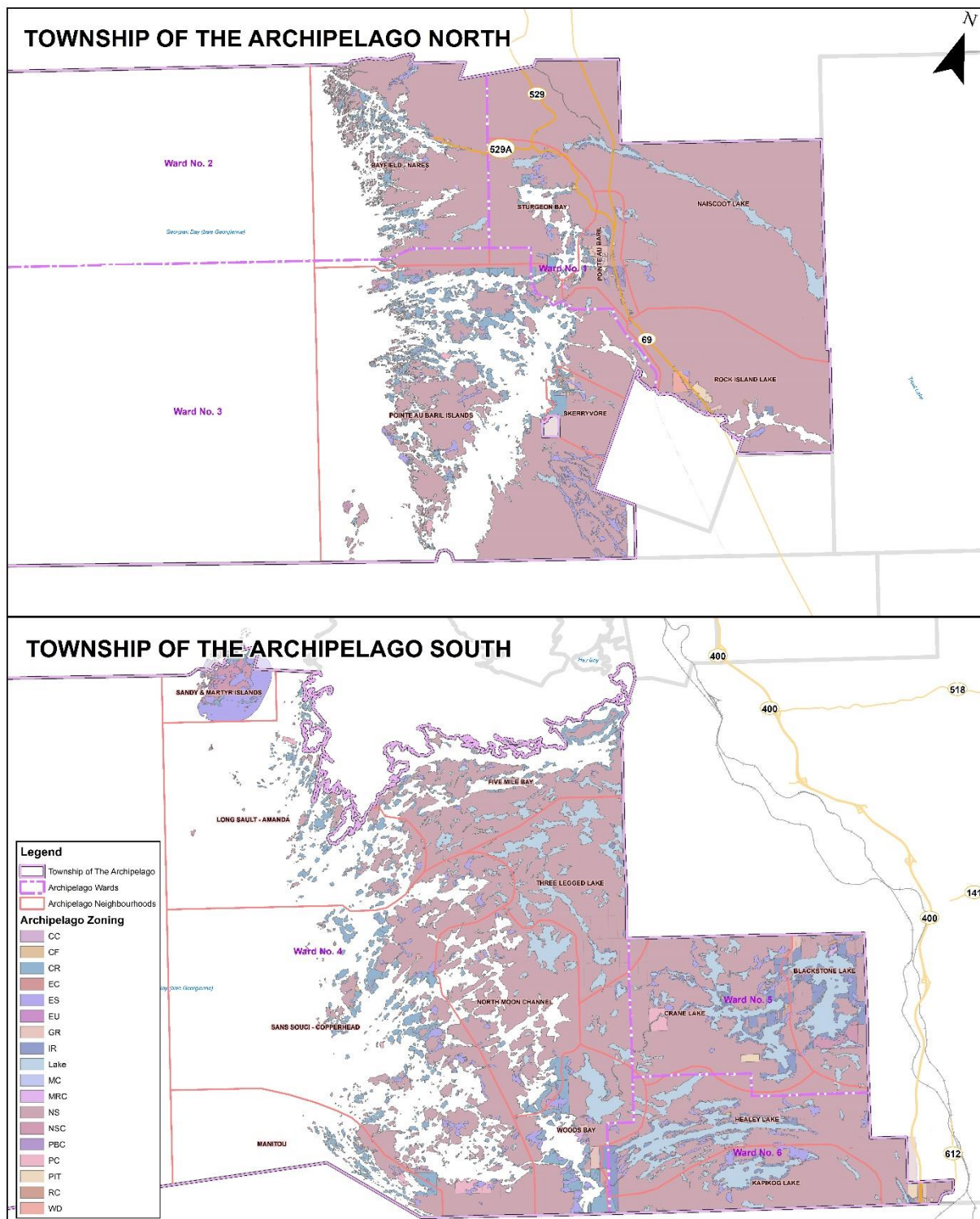
Note: Number of new lots permitted excludes retained lot

Pointe au Baril Station and Skerryvore Neighbourhood policies do not lend themselves to such a summary.

Policies under Section 8 of the Official Plan are applicable for lots in Pointe au Baril Station Neighbourhood. Smaller lot sizes may be provided in Pointe au Baril Station as set out in the Zoning By-law. It is the only neighbourhood that is likely to be considered for a plan of subdivision. Minimum lot area for a new lot being created in the Pointe au Baril Station is considered to be 10,000 sqm (1 ha). A maximum of five (5) new lots are considered to be created from an existing lot in the neighbourhood. Infill area in Pointe au Baril Station was included while the Stable Area excluded from severance potential.

Policies under Section 9 of the Official Plan are applicable for lots in Skerryvore. It is the only neighbourhood outside of Pointe au Baril Station where there are a number of lots that do not have frontage on water. The policies provide Council with the authority to enact holding by-laws restricting development on the backlots until site evaluation report is prepared. It is assumed that these backlots are available for development.

Figure 3. Development Constraints (Zones), The Township of The Archipelago



Appendix C

Classification of MPAC
Codes

| MPAC Code - Description | Type |
|--|------------------------------------|
| 100 - Vacant Residential Land Not On Water | Vacant Residential Land |
| 101 - Second Tier Vacant Lot | Vacant Residential Land |
| 103 - Municipal Park (Excludes Provincial Parks, Federal Parks, Campgrounds) | Land not available for development |
| 105 - Vacant Commercial Land | Vacant Employment Land |
| 106 - Vacant Industrial Land | Vacant Employment Land |
| 107 - Provincial Park | Land not available for development |
| 110 - Vacant Residential/Recreational Land On Water | Vacant Residential Land |
| 111 - Island Under Single Ownership | Vacant Residential Land |
| 120 - Water Lot (Entirely Under Water) | Land not available for development |
| 130 - Non-Buildable Land (Walkways, Buffer/Berm, Storm Water Management Pond, Etc.) | Land not available for development |
| 134 - Land Designated And Zoned For Open Space | Land not available for development |
| 140 - Common Land | Land not available for development |
| 169 - Vacant Land Condominium (Residential) | Vacant Residential Land |
| 200 - Farm Property Without Any Buildings/Structures | Land not available for development |
| 211 - Farm With Residence - With Or Without Secondary Structures; With Farm Outbuildings | Year-round Residential Land |
| 240 - Managed Forest Property, Vacant Land Not On Water | Land not available for development |
| 241 - Managed Forest Property, Vacant Land On Water | Land not available for development |
| 243 - Managed Forest Property, Seasonal Residence On Water | Seasonal Residential Land |
| 244 - Managed Forest Property, Residence Not On Water | Year-round Residential Land |
| 245 - Managed Forest Property, Residence On Water | Year-round Residential Land |
| 261 - Land Owned By A Non-Farmer Improved With A Non-Farm Residence With A Portion Being Farmed | Year-round Residential Land |
| 301 - Single-Family Detached (Not On Water) | Year-round Residential Land |
| 302 - More Than One Structure Used For Residential Purposes With At Least One Of The Structures Occupied Permanently | Year-round Residential Land |
| 303 - Residence With A Commercial Unit | Year-round Residential Land |
| 304 - Residence With A Commercial/Industrial Use Building | Year-round Residential Land |
| 313 - Single Family Detached On Water | Year-round Residential Land |
| 363 - House-Keeping Cottages - No American Plan | Seasonal Residential Land |
| 364 - House-Keeping Cottages - Less Than 50% American Plan | Seasonal Residential Land |
| 370 - Residential Condominium | Year-round Residential Land |
| 381 - Mobile Home | Seasonal Residential Land |
| 385 - Time-Share, Fee Simple | Seasonal Residential Land |
| 391 - Seasonal/Recreational Dwelling - First Tier On Water | Seasonal Residential Land |
| 392 - Seasonal/Recreational Dwelling - Second Tier On Water | Seasonal Residential Land |

| | |
|---|------------------------------------|
| 395 - Seasonal/Recreational Dwelling - Not Located On Water | Seasonal Residential Land |
| 405 - Office Use Converted From House | Employment Land |
| 406 - Retail Use Converted From House | Employment Land |
| 410 - Retail - One Storey, Generally Under 10,000 S.F. | Employment Land |
| 411 - Restaurant - Conventional | Employment Land |
| 450 - Motel | Employment Land |
| 451 - Seasonal Motel | Employment Land |
| 462 - Country Inns & Small Inns | Employment Land |
| 465 - Child And Community Oriented Camp/Resort | Employment Land |
| 471 - Retail Or Office With Residential Unit(S) Above Or Behind - Less Than 10,000 S.F. Gross Building Area (Gba), Street Or Onsite Parking, With 6 Or Less Apartments, Older Downtown Core | Employment Land |
| 486 - Campground | Seasonal Residential Land |
| 492 - Marina - Located On Waterfront - Defined As A Commercial Facility For The Maintenance, Storage, Service And/Or Sale Of Watercraft | Employment Land |
| 493 - Marina - Not Located On Waterfront - Defined As A Commercial Facility For The Maintenance, Storage, Service And/Or Sale Of Watercraft | Employment Land |
| 495 - Communication Towers - With Or Without Secondary Communication Structures | Land not available for development |
| 496 - Communication Buildings | Land not available for development |
| 520 - Standard Industrial Properties Not Specifically Identified By Other Industrial Property Codes | Employment Land |
| 530 - Warehousing | Employment Land |
| 558 - Hydro One Transformer Station | Land not available for development |
| 561 - Hydro One Right-Of-Way | Land not available for development |
| 580 - Industrial Mall | Employment Land |
| 592 - Dump/Transfer Station/Incineration Plant/Landfill | Land not available for development |
| 593 - Gravel Pit, Quarry, Sand Pit | Land not available for development |
| 597 - Railway Right-Of-Way | Land not available for development |
| 701 - Place Of Worship - Without A Clergy Residence | Land not available for development |
| 735 - Assembly Hall, Community Hall | Land not available for development |



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