



TO: Bohdan Wynnyckyj, RPP, Manager of Development Services, Loyalist Township

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SUBJECT: Growth Management Report for Amherstview West Secondary Plan

DATE: July 28, 2021

1 Introduction

Loyalist Township is a lower-tier municipality located in the County of Lennox and Addington in Eastern Ontario. It has a land area of approximately 341.02 km² (2016 Census) and consists of a number of communities, including: Amherstview, Bath, Amherst Island, Odessa, the hamlets of Millhaven, Morven, Stella, Violet, and Wilton, and surrounding agricultural, rural, and residential communities, as illustrated in **Figure 1**.



Figure 1: Loyalist Township Key Map



Loyalist Township is undertaking a Secondary Plan for Amherstview West. The Secondary Plan will provide a policy and implementation framework to guide the future growth and development of this area for the next 25 years. The Secondary Plan will address the extension of Amherstview to the west, to accommodate future growth and development in the community for the next 25 years. It will consider future needs and priorities for the new community, including housing types, urban design, community amenities, protection of the natural environment, and transportation, including active transportation.

As shown in **Figure 2**, the Secondary Plan study area is located to the west of County Road 6 and the existing built-up area in Amherstview, and between Taylor Kidd Boulevard (County Road 23) to the north and Bath Road (Highway 33) to the south.



Figure 2: Amherstview West Secondary Plan Study Area

As part of the Secondary Plan process, a growth management analysis is required to assess the ability to accommodate projected future residential and employment growth and development in Amherstview West. The population, household, and employment forecasts and the growth management analysis are based on the information provided in the Population, Housing and Employment Projections Study (September 2019) prepared by Hemson Consulting Ltd. and subsequent correspondence with Hemson Consulting Ltd., the County of Lennox and Addington, and Township staff in spring 2021.



This Growth Management Report (the “Report”) includes the results of a growth management analysis consisting of the following sections:

- Section 2: Planning Policy Context, including:
 - An overview of the growth management policies relevant to Amherstview West that are contained in the Provincial Policy Statement (2020), County of Lennox & Addington Official Plan (Consolidated Version, February 13, 2018), Loyalist Township Official Plan (approved April 12, 2001 and subsequent amendments), and Draft Official Plan (November 2020);
- Section 3: Population, dwelling, and employment projections for Loyalist Township prepared by Hemson Consulting Ltd. and documented in the report titled “Population, Housing, and Employment Projections to 2046” (September 2019). Hemson’s report is included in **Appendix A** of this Report;
- Section 3.1: An overview of follow-up correspondence with Hemson Consulting Ltd., the County of Lennox and Addington, and Township staff to determine the specific population, dwelling, and employment allocations for Amherstview West; and
- Section 4: The identification of the required land areas to accommodate projected Residential and Employment land needs, and to be designated for Residential and Employment land uses, in the Amherstview West Secondary Plan Study Area.

2 Planning Policy Context

2.1 Provincial Policy Statement (2020)

The 2020 Provincial Policy Statement (PPS) came into effect on May 1, 2020 and replaced the 2014 PPS. The new PPS was prepared as part of the Province’s “More Homes, More Choice: Ontario’s Housing Supply Action Plan”. The goal of the Action Plan is to increase the mix and supply of housing and to stream the development approvals process. The PPS provides policies on matters of provincial interest including quality of the natural and built environment and public health and safety. All land use planning decisions shall be consistent with the policies of the PPS.

Part IV: Vision for Ontario’s Land Use Planning System identifies that land use must be carefully managed to accommodate appropriate development to meet the full range of current and future needs. Planning authorities are encouraged to permit and facilitate a range of housing options, including new development as well as residential intensification, while promoting efficient development patterns that promote a mix of housing, including affordable housing. Growth should also be focused within settlement areas and away from significant or sensitive resources and areas which may pose a risk to public health and safety.

A summary of the policy sections and policies related to the Amherstview West Secondary Plan is provided below.



Housing

- Planning authorities are encouraged to permit and facilitate a range of housing options, including new development, as well as residential intensification, to respond to current and future needs (Part IV).
- A new definition for “housing options” has been added: “a range of housing types such as, but not limited to single-detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings. The term can also refer to a variety of housing arrangements and forms such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts, land lease community homes, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.” (6.0 Definitions)
- A revised definition for “residential intensification” is included: “intensification of a property, site or area which results in a net increase in residential units or accommodation and includes:
 - a redevelopment, including the redevelopment of brownfield sites;
 - b the development of vacant or underutilized lots within previously developed areas;
 - c the conversion or expansion of existing industrial, commercial and institutional buildings for residential use; and
 - d the conversion or expansion of existing residential buildings to create new residential units or accommodation, including accessory apartments, additional residential units, rooming houses, and other housing options.” (6.0 Definitions)
- Planning authorities are required to provide adequate land for a 25-year planning horizon, rather than the 20-year horizon in the 2014 Provincial Policy Statement (Policy 1.1.2).
- Planning authorities are also required to maintain at all times a minimum 15- year supply of lands which are designated and available for residential development (Policy 1.4.1 a), and land servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans (Policy 1.4.1 b). Upper-tier and single-tier municipalities may choose to maintain land with servicing capacity sufficient to provide at least a five-year supply of residential units (Policy 1.4.1).
- Planning authorities shall provide for an appropriate range and mix of housing options and densities to meet projected market-based and affordable housing needs of current and future residents by permitting and facilitating “all housing options required to meet the social, health, economic and well-being requirements of current and future residents [...]”, and “all types of residential intensification, including additional residential units, and redevelopment [...]” (Policy 1.4.3).

Employment Lands

- Employment areas planned for industrial and manufacturing uses shall provide for separation and mitigation from sensitive land uses to maintain the long-term operational and economic viability of the planned uses and function of these areas (Policy 1.3.2.2).
- Employment areas planned for industrial or manufacturing uses should include an appropriate transition to adjacent non-employment areas (Policy 1.3.2.3).



Implementation

“Designated and available,” is defined as “lands designated in the official plan for urban residential use. For municipalities where more detailed official plan policies (e.g. secondary plans) are required before development applications can be considered for approval, only lands that have commenced the more detailed planning process are considered to be designated and available for the purposes of this definition.”

2.2 County of Lennox & Addington Official Plan (Consolidated Version, February 13, 2018)

The County of Lennox & Addington Official Plan (Consolidated Version, February 13, 2018) (“County OP”) directs how and where growth should occur in the County of Lennox and Addington (“County”), and contains population, employment, and housing projections and allocations for the member municipalities. The County is expected to grow to a population of 9,365 persons and 2,552 jobs to 2031. The population projection for Loyalist Township forecasts that the Township is expected to increase by 4,171 persons by 2036 (25.75%) (**Table 1**). The employment projection forecasts an increase by 720 jobs by 2036 (+25.75%) (**Table 2**). It is forecasted that the number of household units in Loyalist Township will increase by 1,702 units by 2036, including 1,328 low-density units and 374 medium density units, as shown in **Table 3**. It should be noted that the County OP does not identify the type of housing that constitutes low density and medium density unit types.

Table 1: Population Growth Forecast for Loyalist Township, 2011-2036 (Excerpt from County OP Table A)

	Population Growth (2011 to 2036)	Growth Rate (2011 to 2036)
Loyalist Township	4,177	25.75%

Table 2: Employment Growth Forecast for Loyalist Township, 2011-2036 (Excerpt from County OP Table B)

	Employment Growth (2011 to 2036)	Growth Rate (2011 to 2036)
Loyalist Township	720	25.75%

Table 3: Housing Forecast for Loyalist Township, 2011 – 2036 (Excerpt from County OP Table C)

	Low Density Units	Medium Density Units	Total
Loyalist Township	1,328	374	1,702

Section B1(a) of the County OP directs that where a local municipality has one or more Urban Areas, growth shall be focused in the Urban Area(s). Section B1(c) gives power to the local municipalities to develop their respective growth management strategies.



Section B6 identifies a minimum intensification target of 10% for Amherstview by 2036, however Section B8 states, “The population, employment and housing targets set out in Tables A, B and C do not have an impact on the ability of the County and local municipalities to consider applications to develop lands that are within an Urban Area or Rural Settlement boundary that existed on the date this Plan came into effect.” **A meeting was held with the County and the County’s planning consultant on April 1, 2021. At the meeting, the County confirmed that the Secondary Plan for Amherstview West is not required to conform to the planning horizon or population, employment, and housing forecasts in the County OP as the study area is located within an urban settlement area. Per Section B8 of the County OP, local municipalities are permitted to exceed the forecasts in this case.**

2.2.1.1 Housing Policies

Section B14.1 of the County OP requires that local municipalities with Urban Areas ensure that there is a 10-year supply of land for residential development in Urban Areas.

2.3 Loyalist Township Official Plan (Approved April 12, 2001)

The current Loyalist Township Official Plan (2001) (“Township OP”) provides a policy framework for managing and directing physical development and its effects on the social, economic, and natural environment in Loyalist Township to the year 2020. The Township OP does not contain policies specific to growth management or target residential densities for Amherstview West, but rather overarching policy direction for the residential land use designations within the Township.

Policy 1.5.2 outlines the strategy of the Township OP, which directs that the majority of residential growth will take place as an expansion to existing serviced areas within Loyalist Township, mainly the communities of Amherstview, Bath and Odessa.

Section 4.5.1 of the Township OP categorizes patterns of settlement as “urban settlement area” and “rural settlement area.” Per Schedule A of the Township OP, Amherstview is within an urban settlement area. The Amherstview West study area is located within the boundaries of the Amherstview urban settlement area.

The Township OP identifies maximum net residential densities for various residential designations. These are summarized below in **Table 4**.

Table 4: Maximum Net Residential Densities – Loyalist Township OP (approved April 12, 2001)

Land Use Designation	Maximum Net Residential Density	Township OP Policy Reference
Suburban Residential* (includes single-detached dwellings on large fully serviced estate type lots; applied to certain lands within the Windermere Estates Secondary Plan Area in Bath)	10 units / net hectare	Policy 4.6.1.4
Low Density Residential (includes single-detached dwellings, semi-detached dwellings, duplexes, and accessory uses)	31 units / net hectare	Policy 4.6.1.5
Medium Density Residential (includes Low Density Residential uses, triplexes, quadruplexes, maisonettes, row or cluster housing, converted single-detached dwellings creating not more	60 units / net hectare	Policy 4.6.1.6



Land Use Designation	Maximum Net Residential Density	Township OP Policy Reference
than four (4) dwelling units, street front townhouses, low-rise apartment dwelling houses, other forms of multiple-unit housing, and accessory uses)		
High Density Residential (includes uses permitted in the Medium Density Residential designation, as well as stacked townhouses and apartment dwelling houses. New single-detached, semi-detached, and duplex dwellings shall not be permitted.)	120 units / net hectare	Policy 4.6.1.7

*Included for information purposes. The Suburban Residential designation does not apply to the lands in Amherstview per Schedule A of the Township OP and Township Draft Official Plan.

2.4 Draft Loyalist Township Official Plan (November 2020)

The Township’s ongoing Official Plan Review commenced in 2016, and will bring the Official Plan into consistency with the updated policies contained in the PPS, 2020. The Loyalist Township Draft Official Plan (November 2020) (“Township Draft OP”) will establish a planning horizon to 2036. The Draft Official Plan is anticipated to be adopted by Council in summer 2021.

Section 3.5.1 Growth Management Goal (formerly Section 3.5 Settlement Goal in the current Township OP) includes the following growth management objectives that are relevant to the Amherstview West study area to:

- Accommodate the population and growth forecasts to 2036 (Policy 3.6.1.1).
- Promote the growth and development of the Township at suitable locations in a planned orderly manner consistent with the Township’s ability to absorb such development. **Development shall proceed according to the policies of Section 4 of this Plan (Growth Management).** Council will, generally direct development to the **urban settlement** areas where full municipal services are available (Policy 3.6.1.2).
- Direct residential intensification and infilling to the urban settlement areas of Amherstview, Bath and Odessa (Policy 3.6.1.3).
- Encourage a diversity of residential types, mix of land uses and densities at appropriate locations to satisfy social and economic needs of the population, **that will ultimately minimize the negative impacts to air quality and climate change** (Policy 3.6.1.5).
- Encourage the creation of “**complete communities**” in the design of new neighbourhoods (Policy 3.6.1.11).



Part 4 – Growth Management in the Township Draft OP details the Township’s strategy for growth within settlement areas. The Township is projected to accommodate a population of approximately 20,398 people by the year 2036 and 3,515 jobs (Policy 4.2.1). It is noted that the Township Draft OP’s planning horizon is to 2036 and includes population and employment projections to the year 2036 derived from the County OP. Township staff noted that this was done to be consistent with the County OP planning horizon. Further discussion with the County and Township staff (meeting held on April 1, 2021) confirmed that Section B1 of the County OP gives power to local municipalities to develop their own growth management strategies for lands designated for future development within existing settlement areas, with differing planning horizons than that of the County OP.

Per Policy 4.2.2, the minimum residential intensification target for Amherstview is 10%. It is important to note that this target is for the entirety of Amherstview and not for Amherstview West specifically.

Section 5.7 of the Township Draft OP includes policies with revised targeted maximum residential net densities for the Residential-designated lands within all Urban Settlement Areas. The proposed residential net densities proposed in the Township Draft OP are summarized in **Table 5**.

Table 5: Maximum Residential Net Densities – Draft OP (November 2020)

Land Use Designation	Maximum Net Residential Density	Policy Reference
Suburban Residential (includes single-detached dwellings on large fully serviced estate type lots; applied to certain lands within the Windermere Estates Secondary Plan Area in Bath and does not apply to lands in Amherstview)	10 units / net hectare	Policy 5.7.1.4(a)
Low Density Residential (includes single-detached dwellings, semi-detached dwellings, duplexes, and accessory uses)	37.5 units / net hectare	Policy 5.7.1.5(a)
Medium Density Residential (includes Low Density Residential uses, triplexes, quadruplexes, maisonettes, row or cluster housing, converted single-detached dwellings creating not more than four (4) dwelling units, street front townhouses, low-rise apartment dwelling houses, other forms of multiple-unit housing, and accessory uses)	75 units / net hectare	Policy 5.7.1.6(b)
High Density Residential (includes uses permitted in the Medium Density Residential designation, as well as stacked townhouses and apartment dwelling houses. New single-detached, semi-detached, and duplex dwellings shall not be permitted.)	120 units / net hectare	Policy 5.7.1.7(b)

Section 10.22.16 of the Township Draft OP defines “Net Density” as “the ratio of the number of residential units to one (1) net hectare. Net hectare means the area of land to be developed less any lands to be dedicated to the Municipality for public roads, walkways, open space, parks, community facilities such as but not limited to libraries, fire stations, recreation facilities, schools, and which are not an environmental category where they would be considered inappropriate as part of the parkland dedication under the Planning Act.”



3 Population, Housing, and Employment Projections to 2046 (Hemson Report, September 18, 2019)

As part of the ongoing Loyalist Township Official Plan Review, Hemson Consulting Ltd. (“Hemson”) prepared a Population, Housing and Employment Projections Study (“Hemson Report”) dated September 2019, for a planning horizon to 2046 (**Appendix A**). The Hemson Report examined the demographic and economic growth and change in Loyalist Township within the context of recent trends and the 2016 Census, development, and land supply information. The Hemson Report presented population, housing, and employment forecasts for the entire Township and local allocations for Amherstview, Bath, Odessa, and Amherst Island, and the Rural Area, to be used as a basis for planning for future growth and development. The findings of the Hemson Report were presented to Township Council on July 29, 2019.

In support of their growth projection analysis, Hemson conducted a background review of servicing and land supply. This review is not included in their Report, but it concluded that local public infrastructure and servicing constraints which have historically affected housing supply in Loyalist Township have been alleviated in recent years, creating new possibilities for future development.

The Hemson Report did not include a vacant land supply analysis for Loyalist Township.

The Hemson Report presents three forecast scenarios – low, reference, and high growth – which incorporate varied assumptions about the Township’s future economic outlook. Hemson recommends that the Reference Scenario be used as a basis for planning and as such, is the scenario that was referenced in the preparation of this Growth Management analysis.

Based on the Hemson Report, the projected population, household, and employment growth for the entirety of Amherstview to the year 2046 is shown in **Table 6** and is summarized below:

- The population of Amherstview is anticipated to grow by 2,640 people from 2021 to 2046, for a total population of 12,400 people by 2046.
- The number of occupied households in Amherstview will increase by 1,540 households from 2021 to 2046, for a total of 5,310 households by 2046.
- Employment in Amherstview will increase by 620 jobs from 2021 to 2046, for a total of 2,950 jobs by 2046.

Table 6: Forecast Population, Households and Total Employment Allocations for Amherstview, 2016-2046, Reference Scenario (Hemson Consulting Ltd., September 2019)

Year	Total Population	Growth	Occupied Households	Growth	Total Employment	Growth
2016	9,150	-	3,450	-	2,180	-
2021	9,760	610	3,770	320	2,330	150
2026	10,450	690	4,150	380	2,510	180
2031	11,040	590	4,510	360	2,640	130
2036	11,510	470	4,780	270	2,750	110
2041	11,960	450	5,030	250	2,830	80
2046	12,400	440	5,310	280	2,950	120
2016-2031		1,890		1,060		460



2031-2046		1,360		800		310
2016-2046		3,250		1,860		770

As shown in **Table 7**, average household size in Loyalist Township was 2.47 persons per residential unit in 2016 (2016 Statistics Canada Census). The Hemson Report projects that the average household size will decrease in Loyalist Township from 2.46 persons per residential unit (2016) to 2.42 persons per residential unit by 2021, and will continue to decrease to 2.15 persons per residential unit by 2046.

Table 7: Historical and Forecast Average Household Size (Persons Per Unit) Loyalist Township, 2001-2046 (Hemson Consulting Ltd., September 2019)

Year	Persons Per Unit
2001	2.66
2006	2.57
2011	2.53
2016	2.47
2021	2.42
2026	2.36
2031	2.29
2036	2.24
2041	2.20
2046	2.15

The Hemson Report includes historical and forecast housing by unit type (**Table 8**). It is anticipated that single-detached dwellings will continue to be the dominant housing form in Loyalist Township to 2046, however a moderate increase in rowhouse dwellings is also expected. As part of the Secondary Plan process, other housing forms will be explored including semi-detached dwellings and low-rise apartments as an additional housing form to single-detached and rowhouse dwellings.

Table 8: Historical and Forecast Housing by Unit Type, Loyalist Township, 2001-2046 (Hemson Consulting Ltd., September 2019)

Year	Housing by Unit Type			
	Single/Semi	Row	Apts	Total
2001	4,160	400	570	5,130
2006	4,630	350	580	5,560
2011	4,990	400	580	5,970
2016	5,310	560	560	6,430
2021	5,590	790	580	6,960
2026	5,910	1,050	610	7,570
2031	6,270	1,310	630	8,210
2036	6,570	1,520	650	8,740
2041	6,830	1,700	670	9,200



Year	Housing by Unit Type			
	Single/Semi	Row	Apts	Total
2046	7,140	1,910	680	9,730
2016-2046	1,830	1,350	120	3,300

3.1 Identifying Population, Housing, and Employment Projections for Amherstview West

As the Hemson Report did not include specific local population, housing, and employment allocations for Amherstview West to 2046, follow-up with Hemson was required. This section provides a summary of meetings and correspondence with Hemson, the County of Lennox and Addington, and Township staff that occurred in March and April 2021.

The County confirmed that Section B8 of the County OP permits local municipalities to develop their own growth management strategies. Although the Township Draft OP’s planning horizon is to 2036 to be consistent with the County OP, the County confirmed that the Township can proceed with setting a planning horizon for Amherstview West Secondary Plan that exceeds that of the County OP. As such, the Township Draft OP will include a site-specific policy for the Secondary Plan area to enable a 25-year planning horizon to the year 2046.

Residential Projections

Hemson confirmed that the lands east of the Amherstview West Study Area (southeast of County Road 6 and Taylor Kidd Boulevard) are anticipated to be fully built out by 2028. According to Hemson, as of April 2021, there will be a supply of approximately 860 residential units at full build out of this area, 320 of which are anticipated to be completed by May 2021. The remaining 540 residential units will be built out by 2028, at an anticipated rate of 76 units/year from 2021 to 2026, and 72 units/year from 2026 to 2031. **As such, Hemson concluded that the remaining 1,000 residential units of the 1,860 units that they had originally forecasted for Amherstview in the Hemson Report (as shown in Table 6) should be allocated to Amherstview West.** Hemson’s methodology in their April 21, 2021 correspondence is summarized in Table 9.

Table 9: Hemson – Residential Dwelling Projection for Amherstview West (to 2046)

Residential Growth from 2016-2046 Amherstview (Table 14, Hemson Report)	1,860 units
Units to be Built in Amherstview (2016-2021)*	320 units
Units to be Built in Amherstview (2021-2028)*	540 units
Remaining Supply to be Allocated to Amherstview West (2028 – 2046)	Total Residential Growth in Amherstview (2016-2046) – Built Units (2016-2028) = 1,860 units – (320 units + 540 units) = 1,860 units – 860 units = 1,000 units

*Per Hemson’s email dated April 21, 2021, these residential units are anticipated to be built beyond the Secondary Plan Study Area within Amherstview (east of Amherstview West).



Commercial Employment Projections

Hemson provided commercial employment projections to 2046 for Amherstview West.. It is important to note that Hemson provided commercial employment projections using a different 2016 population figure for Amherstview than was referenced in the Hemson Report. In 2016, the population of Amherstview was approximately 8,200 people and there were approximately 300 to 350 commercial jobs in Amherstview (2016 Census). From this, Hemson calculated that there was about 3.7 to 4.3 commercial jobs per 100 people in Amherstview. Applying the ratio of 3.7 to 4.3 commercial jobs per 100 people to Amherstview West, results in a projected 110 to 130 commercial jobs by 2046. Hemson recommended that the high scenario should be used for planning purposes. **For the purposes of this Growth Management Report, the 2016 population figure for Amherstview was used as the base for the commercial employment land calculations. Commercial employment land calculations were prepared using Hemson’s methodology in their May 14, 2021 correspondence.**

4 Growth Management Analysis

This section provides an analysis of population projections, and residential and employment land supply to determine whether the Township has existing, designated, and available land to accommodate the future residential and employment demand within Amherstview West.

4.1 Apply Gross-Up Factor

A “gross-up” factor is applied to go from net hectares to gross hectares and involves adding a percentage of land which will accommodate infrastructure and other considerations.

A 25% “gross-up” factor will be applied to the Residential Growth Analysis to account for required infrastructure (transportation, servicing, parks, and other community facilities), based on best practices.

A 25% “gross-up” factor will be applied to the Employment Growth Analysis to account for associated infrastructure and required buffering, based on best practices.

4.2 Population Growth Analysis

The following assumptions have been applied to the population growth analysis:

- 1,000 residential units will be added to Amherstview West by 2046.
- Hemson’s historical and forecast average household sizes for Loyalist Township (**Table 7**) are applied to Amherstview West.

Two scenarios for future population growth in Amherstview West have been prepared.

Scenario 1

Using the current 2021 average household size (2.42 persons per residential unit) and applying Hemson’s assumption that there will be 1,000 residential units added to Amherstview West by 2046, the population of Amherstview West is expected to increase by approximately 2,420 people by 2046 as calculated below:

- Population growth (Amherstview West) = 1,000 units * 2.42 = 2,420 people



Scenario 2

The average projected household size for the Township from 2021 to 2046 is 2.28 persons per residential unit. Using this projected average household size, the population of Amherstview West is expected to increase by 2,280 people by 2046 as calculated below:

- Population growth (Amherstview West) = 1,000 units * 2.28 = 2,280 people

On July 15, 2021, Township staff confirmed that the Population Growth Analysis should proceed with Scenario 1.

4.3 Residential Growth Analysis

This section provides an analysis of future residential growth in Amherstview West to determine the required area of land to accommodate and be designated for future residential development.

Assumptions

The following residential density ratio and assumptions will be used to determine the future residential growth potential on the unplanned vacant parcels within Amherstview West:

- It is assumed that all, if not most of the residential growth in the Amherstview settlement area from 2021 to the year 2046 will be directed to Amherstview West, and that a total of 1,000 residential dwelling units will need to be accommodate in Amherstview West by 2046.
- Assumptions regarding the number of dwelling units per net hectare are derived from the applicable policies in Section 5.7 of the Township's Draft Official Plan (November 2020).
- Residential land was not allocated to the Suburban Residential designation as it is assumed that this designation mainly applies to lands part of the Windermere Estates Secondary Plan in Bath.
- Using the Hemson Report's forecast housing by unit type as shown in **Table 8**, dwelling type proportions were calculated and allocated to the Residential designations in the following manner:
 - Low Density Residential – single/semi-detached dwellings;
 - Medium Density Residential – rowhouses; and
 - High Density Residential – apartments.
- Hemson's forecasted housing numbers by unit type for Loyalist Township (**Table 8**) were applied to the dwelling type proportion calculations for Amherstview West.
- A 25% "gross-up" factor was applied to the Residential Land Analysis to account for required infrastructure (transportation, servicing, parks, and other community facilities), based on best practices.

Residential Land Demand

By taking the forecasted housing numbers by unit type for Loyalist Township in **Table 8**, the required dwelling type proportions for Amherstview West (2016-2046) were calculated as follows:

- Single/Semi-Detached Dwellings (Low Density Residential)



- $[(\text{Single/Semis added from 2016-2046 (Table 8)}) / (\text{Total units added from 2016-2046 (Table 8)})] * 100$
- $= (1,830 \text{ units} / 3,300 \text{ units}) * 100 = 55\%$
- Rowhouses (Medium Density Residential)
 - $[(\text{Rowhouse units added from 2016-2046 (Table 8)}) / (\text{Total units added from 2016-2046 (Table 8)})] * 100$
 - $(1,350 \text{ units} / 3,300 \text{ units}) * 100 = 41\%$
- Apartments (High Density Residential)
 - $[(\text{Apartment units added from 2016-2046 (Table 8)}) / (\text{Total units added from 2016-2046 (Table 8)})] * 100$
 - $(120 \text{ units} / 3,300 \text{ units}) * 100 = 4\%$

The above dwelling type proportions were then applied to the allocation of 1,000 residential units for Amherstview West (to 2046) as provided by Hemson in their April 21, 2021 email to determine the number of dwelling unit demand by type:

- Single/Semi-detached Dwellings (Low Density Residential) – $55\% * 1,000 \text{ units} = 550 \text{ units}$
- Rowhouses (Medium Density Residential) – $41\% * 1,000 \text{ units} = 410 \text{ units}$
- Apartments (High Density Residential) – $4\% * 1,000 \text{ units} = 40 \text{ units}$

Based on the Township’s residential density ratios and assumptions, the results of the residential land demand analysis for Amherstview West are summarized in **Table 10**.

Table 10: Residential Land Demand Analysis - Amherstview West (Unplanned Parcels)

Residential Designation (Dwelling Types)	Dwelling Type Proportion	Residential Land Demand		
		Dwelling Units (of 1,000)	Max. Gross Density (units/net ha)	Land Requirement (net ha)
Low Density	55%	550	37.5	14.67
Medium Density	41%	410	75	5.47
High Density	4%	40	120	0.33
Net Residential Land Demand			20.47 net ha	
Gross Residential Land Demand greater 25%)			25.89 ha	

*The net area applies to a gross-up factor of 25% for infrastructure, parks, etc. Figures are rounded.

It is anticipated that there will be a need for 20.47 net hectares of land (25.91 gross hectares) comprised of unplanned parcels, to accommodate new residential development in Amherstview West.



4.4 Employment Growth Analysis

This section provides an analysis of the projected employment allocations to 2046 for Amherstview West to determine the area of land that will be required to accommodate the additional employment demand.

Assumptions

The required employment land area calculations for Amherstview West were prepared in accordance with the following assumptions:

- As noted by Township staff, Loyalist East Business Park is currently under development on the lands northwest of County Road 6 and Taylor Kidd Boulevard. At the time of this Growth Management analysis, the Township anticipated that the future employment uses for Loyalist East Business Park will likely be mainly industrial and that future industrial employment areas will be concentrated outside of the Amherstview West study area. As such, Hemson did not prepare projections for industrial employment in Amherstview West, and employment land needs calculations have been prepared for commercial employment only. Per the Township OP and Township Draft OP, commercial uses include: retail facilities, automobile sales and service establishments, places of entertainment, eating establishments, studios, and offices.
- Calculations were prepared using the 2016 population figure (9,150 people) for Amherstview from the 2019 Hemson Report (see **Table 6**).
- Per correspondence with Hemson (May 14, 2021), it is assumed that there were 300 to 350 commercial jobs in Amherstview in 2016, with approximately 35 m² of commercial employment space per employee. The high scenario (350 jobs) was used for planning purposes as was recommended by Hemson in their May 14, 2021 correspondence.
- Population and commercial employment figures in Amherstview were applied to Amherstview West.

A 25% “gross-up” factor was applied to the Employment Growth Analysis to account for required infrastructure (transportation, servicing, parks, and other community facilities), based on best practices.

Commercial Employment Land Demand

Two (2) scenarios were prepared using the 2046 population projections calculated in Section 4.2 of this Report. **On July 15, 2021, Township staff confirmed that the Population Growth Analysis should proceed with Scenario 1. As such, the Commercial Employment Land Demand Analysis shall proceed with Scenario 1 as described below.**

Scenario 1

Scenario 1 assumes that there will be a population growth of 2,420 people in Amherstview West by 2046.

For commercial employment, the employment density was calculated as follows:

- 350 commercial jobs / 9,150 people = 3.8 commercial jobs per 100 people

The commercial employment projection for 2046 was calculated using the above density:



- $(3.8 \text{ jobs per } 100 \text{ people}) * (2,420 \text{ people} * 0.01) = 91.96 \text{ commercial jobs}$
= 92 commercial jobs in Amherstview West by 2046.

The area of commercial land using the commercial employment projection and jobs per m² was then calculated:

- $92 \text{ jobs} * 35 \text{ m}^2 \text{ commercial floor space per employee} = 3,220 \text{ m}^2 \text{ of commercial floor space} = 0.322 \text{ net hectares of commercial floor space.}$

In the May 14, 2021 correspondence from Hemson, they advised that there is currently approximately 10,250 m² of commercial floor space that exists on a total of 4.2 hectares of land in Amherstview. This translates to an approximate Floor Space Index (FSI) of 25% as calculated below.

- $10,250 \text{ m}^2 = 1.025 \text{ hectares of commercial floor space}$
- $\text{FSI} = (\text{Ground Floor Area} / \text{Total Area}) * 100$
= $(1.025 \text{ hectares} / 4.2 \text{ hectares}) * 100$
= 24.4%

If an FSI of 24.4% is applied to West Amherstview, this results in a commercial land need of

- $\text{Commercial land need} = \text{Total Area} / \text{FSI}$
= $0.322 \text{ hectares} / 0.244 \text{ FSI}$
= 1.32 net hectares of commercial land area

A 25% gross-up factor is added to the above land area to account for associated infrastructure and buffering, based on best practices. The net commercial land area is calculated below.

- $1.32 \text{ net hectares} * 0.25 = 0.33 \text{ hectares}$
- $0.33 \text{ hectares} + 1.32 \text{ hectares}$
= 1.65 gross hectares of commercial land area

Scenario 2

Scenario 2 assumes that there will be a population growth of 2,280 people in Amherstview West by 2046.

The following commercial employment projection and densities were applied:

- Commercial: 130 commercial jobs in Amherstview West by 2046; and
- Commercial: 35 m² (0.0035 ha) per employee.

The commercial employment projection was calculated using the above density:

- $(3.8 \text{ jobs per } 100 \text{ people}) * (2,280 \text{ people} * 0.01) = 86.64$
= 87 commercial jobs in Amherstview West by 2046

The area of commercial land using the commercial employment projection and jobs per m² was then calculated:

- $87 \text{ jobs} * 35 \text{ m}^2 \text{ per employee} = 3,045 \text{ m}^2 \text{ of commercial land} = 0.305 \text{ net hectares}$



In their May 14, 2021 correspondence, Hemson calculated that there is approximately 10,250 m² of commercial space that exists on a total of 4.2 hectares of land in Amherstview at present. This translates to a Floor Space Index (FSI) of 25% as calculated below.

- 10,250 m² = 1.025 hectares
- FSI = (Ground Floor Area / Total Area) * 100
= (1.025 hectares / 4.2 hectares) * 100
= 24.4%

If an FSI of 24.4% is applied to West Amherstview, this results in a commercial land need of

- Commercial land need = Total Area / FSI
= 0.305 hectares / 0.244 FSI
= 1.25 net hectares of commercial land area

A 25% gross-up factor is added to the above land area to account for associated infrastructure and buffering, based on best practice. The net commercial land area is calculated below.

- 1.25 net hectares * 0.25 = 0.3125 hectares
- 0.3125 hectares + 1.25 hectares
= 1.56 gross hectares of commercial land area

5 Conclusion

In summary, the population of Amherstview West is expected to grow by approximately 2,420 people by 2046.

It is anticipated that approximately 1,000 residential dwelling units will be added to Amherstview West by 2046.

The results of the residential land analysis indicate that 20.47 net hectares of residential land will be required to accommodate the 1,000 residential dwelling units to be added to Amherstview West by 2046. Low density residential (550 units) will require 14.67 net hectares of land, 5.47 net hectares for medium density residential (410 units), and 0.33 net hectares for high density residential (40 units).

The results of the commercial employment land analysis show that 1.32 net hectares (1.65 gross hectares) of commercial employment land will be needed to accommodate the forecasted commercial jobs.

Appendix

A

Population, Housing, and
Employment Projections to 2046
(September 2019), prepared by
Hemson Consulting Ltd.

POPULATION, HOUSING AND EMPLOYMENT PROJECTIONS TO 2046



FINAL REPORT

HEMSON Consulting Ltd.

September 18, 2019

EXECUTIVE SUMMARY

The Township of Loyalist retained Hemson Consulting Ltd. to prepare a Population, Housing and Employment Projections Study. A key purpose of the study is to re-evaluate and update the population, housing and employment projections prepared for the Township in 2008 using the most currently available data. The study involves examining demographic and economic growth and change in the Township within the context of recent trends and current Census, development and land supply information. It is undertaken in a manner consistent with the Provincial Policy Statement, 2014. Study results will provide a basis for planning for future growth and development in Loyalist. Forecasts of population, housing and employment have been prepared for the Township from 2016 to a 2046 horizon, along with local allocations of forecast growth to each of the Amherstview, Bath and Odessa communities, Amherst Island and the rural area.

Key study findings include:

- Loyalist has continued to experience moderate growth in population and households over the last three Census periods. The Township added 2,250 residents and 1,300 households over the 2001 to 2016 timeframe. The rate of housing growth in Loyalist has been outpacing population growth since 2001, owing to declining average household size, which is a result of demographic change underway in the Township.
- The aging population results in a declining average household size as older populations generally have households with more “empty nesters”, fewer children, and more single people due to divorce and widowhood. The effect is that a greater number of housing units is required to house the same amount of population than if that population were younger. Within the context of an aging population, the population would stabilize and begin to decline in the absence of in-migration.
- Loyalist is most strongly linked with the City of Kingston and is part of the Kingston Census Metropolitan Area (CMA). Many Loyalist residents work in Kingston and to a lesser extent Greater Napanee, The Township also provides employment opportunities to residents from these areas and the broader Central Eastern Ontario region.
- The Township’s employment base increased by 460 net jobs between 2001 and 2016 within the context of a shifting economic base and employment decline

in both Census periods between 2001 and 2011, followed by significant growth over the most recent Census period. Most of the Township's employment base continues to be in population-services with traditional industries also comprising a significant proportion the local job base.

- The distribution of growth within Loyalist has been largely influenced by the location of communities in relation to the City of Kingston, with which the Township has significant commuting and resident migration flows. Within Loyalist, the community of Amherstview is the largest population settlement area and the focal point of residential growth. The Bath community also experienced growth over recent Census periods, while population in Odessa has remained relatively stable.
- Three forecast scenarios were prepared incorporating varied assumptions about the Township's future economic outlook – a low, reference and high growth scenario based on assumptions about varying levels of future in-migration to Loyalist. The reference scenario represents the most likely outcome and an appropriate basis for planning.
- The forecast results indicate moderate growth in population over the period from 2016 to the 2046 planning horizon. Housing growth is anticipated to continue to out-pace population due to declining average household size. Modest employment growth is expected to continue over the forecast horizon, reflecting changes in labour force participation related to the aging population and a continued shift to services-based sectors and some growth in traditional industry employment.
- The historical pattern within Loyalist is anticipated to continue through the forecasts, reflected in the local allocations of growth.

Summary results by forecast scenario for population, households and total place of work employment are shown below.

Summary Results by Forecast Scenario				
Loyalist Township, 2016-2046				
	2016	2046		
		Forecast Scenario		
		Low	Reference	High
Population*	17,390	18,320	22,600	23,280
Households	6,430	7,240	9,730	10,360
Employment	4,710	4,960	6,140	6,330

*Total Population Including Census Net Undercoverage

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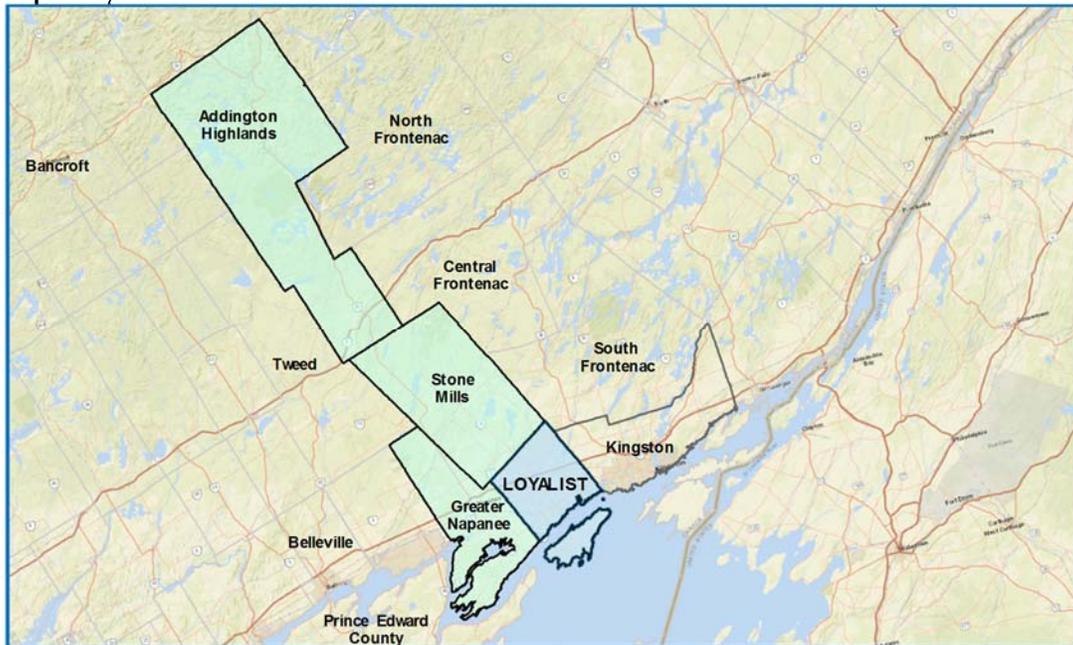
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I INTRODUCTION

Loyalist Township is one of four lower-tier municipalities, along with the Town of Greater Napanee and the Townships of Stone Mills and Addington Highlands, located within the County of Lennox & Addington in central Eastern Ontario. The Township is 340 square kilometres and comprises the residential communities of Amherstview, Bath and Odessa, a large rural agricultural area and Amherst Island.

Map 1: Loyalist in a Central Eastern Ontario Context



In 2016, Loyalist reached a population of 17,380 (including Census net undercoverage) residing in 6,430 households with an employment base of 4,700 jobs. Highway 401 runs through the Township abutted by the Odessa community and providing linkages to Greater Napanee, the City of Kingston and the rest of eastern Ontario. Loyalist is part of the Kingston Census Metropolitan Area (CMA) and neighbours the City to the west, exhibiting strong economic ties to the City where many Loyalist residents are employed. The Town of Greater Napanee to the west, which is the County seat of Lennox & Addington is also an important employment centre for the Township. Many residents from these areas benefit from employment opportunities in Loyalist as well.

A. PLANNING POLICY FRAMEWORK

Planning and growth management in Lennox & Addington and the Township is undertaken in the context of the Provincial policy framework, and must be consistent with Provincial land use planning policies and priorities, notably those set out in the Provincial Policy Statement (PPS), 2014.

The PPS provides direction for land use planning and appropriately managing growth and urban development in Ontario while protecting and enhancing natural heritage features. The Province released an updated PPS in 2014, including a number of strengthened policies for directing the distribution of growth, the protection of natural and agricultural lands, planning for employment lands and other key growth management policies. The PPS 2014 also placed greater emphasis on the unique characteristics and planning challenges for rural communities.

Municipal official plans are the implementing vehicles of Provincial planning direction. The County of Lennox and Addington adopted the first County Official Plan on September 30, 2015. The plan establishes a broad, upper tier policy framework that provides guidance to local Official Plans, Official Plan Amendments and zoning by-laws. As a lower-tier municipality within the County, Loyalist's growth projections and planning account for the County's updated policy framework.

The Township of Loyalist formed on January 1, 1998, through the amalgamation of Amherst Island Township, Ernestown Township, and Bath Village. The *Loyalist Township Official Plan* consolidated the prior official plans for the former Townships and sets out local priorities and guidance for managing growth and development within Loyalist. The Township is currently undertaking an official plan review that, among other matters, will update the planning document for consistency with the County Official Plan and the PPS, 2014. The Population, Housing and Employment Projections study will provide a key input to updating the forecasts that provide a basis for the Official Plan, as well as extending the growth outlook for Loyalist Township over the longer-term to a 2046 horizon.

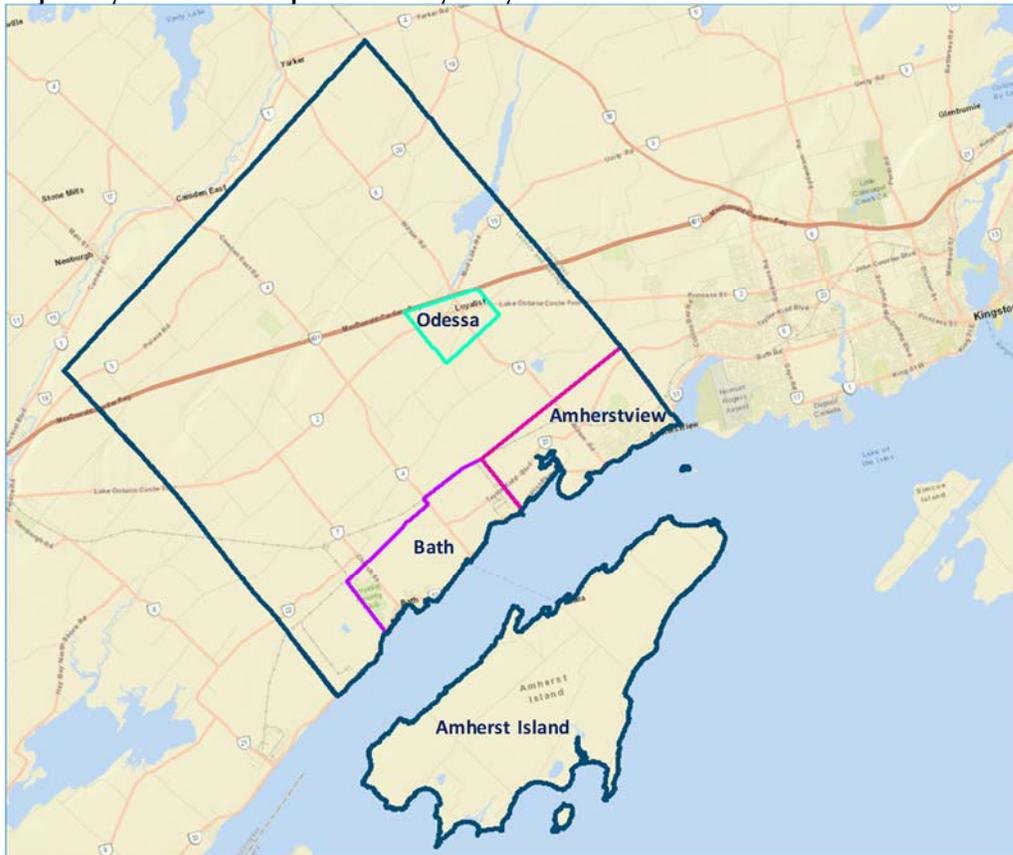
B. BACKGROUND AND STUDY PURPOSE

The Township of Loyalist retained Hemson Consulting Ltd. to prepare the Population, Housing and Employment Projections Study. A key purpose of the study is to re-evaluate and update the population, housing and employment projections last prepared for the Township in 2008, using the most currently available data, including

results of the 2016 Census. The City of Kingston has also very recently updated the projections and extended the growth outlook for the broader Kingston CMA to a 2046 horizon. This recent update was partly in response to forecasts prepared in 2013, which did not appear to be accurately capturing the growth picture for the region, notwithstanding but also highlighting the inherent uncertainty in forecasting and importance of regular review of long-range growth projections, based on the most current understanding of demographic and economic trends and data.

The Loyalist projections study involves examining demographic and economic growth and change in the Township within the context of recent trends and current Census, development and land supply information. Results of the study will provide a basis for planning for future growth and development in Loyalist. Population, housing and employment forecasts from 2016 to a 2046 horizon have been prepared for the Township. Three forecast scenarios – a low, reference and high – were prepared for consideration by Township Staff and Loyalist Council. Local allocations of forecast growth to each of the Odessa, Bath and Amherstview communities, Amherst Island and the rural area were also prepared based on the reference scenario.

Map 2: Loyalist Sub-Municipal Community Study Area



C. REPORT CONTENTS

Following this introductory section, the balance of this report is organized into three sections:

- **Section 2** examines the level and distribution of recent residential and employment growth and discusses demographic and economic trends affecting the future growth outlook for Loyalist. An overview of recent growth and change within Loyalist communities is also provided;
- **Section 3** provides an overview of the forecast methodology and assumptions that underpin the growth outlook and the results of the population, housing and employment forecast for three growth scenarios as well as allocations of the reference scenario growth forecasts to communities within Loyalist; and
- **Section 4** concludes the Loyalist Population, Housing, and Employment Projections Study report.

II GROWTH IN LOYALIST OCCURRING AMIDST DEMOGRAPHIC AND ECONOMIC CHANGE

This section provides an overview of residential growth and demographic change occurring within the Township, which are key considerations in assessing the future growth outlook in Loyalist.

A. LOYALIST ADDED POPULATION AND HOUSEHOLDS DURING EACH CENSUS PERIOD SINCE 2001

Loyalist experienced moderate growth in population and households over the last decade. The Township added 2,250 residents and 1,300 households over the three Census periods since 2001, as shown in Tables 1 and 2 below. Population growth picked up significantly during the ten-year period from 2006 to 2016, relative to more modest growth in the early 2000s. Growth in households has remained relatively constant over the last three Census periods, while the average annual rate of household growth has been faster than of population for reasons described later in this section.

Table 1: Historical Population Growth, Loyalist Township, 2001-2016

Historical Population Loyalist Township, 2001 - 2016			
Year	Total Population ¹	Growth	
		Net Change	Average Annual Growth Rate
2001	15,140		
2006	15,570	430	0.6%
2011	16,630	1,060	1.3%
2016	17,390	760	0.9%
2001-2016		2,250	1.0%

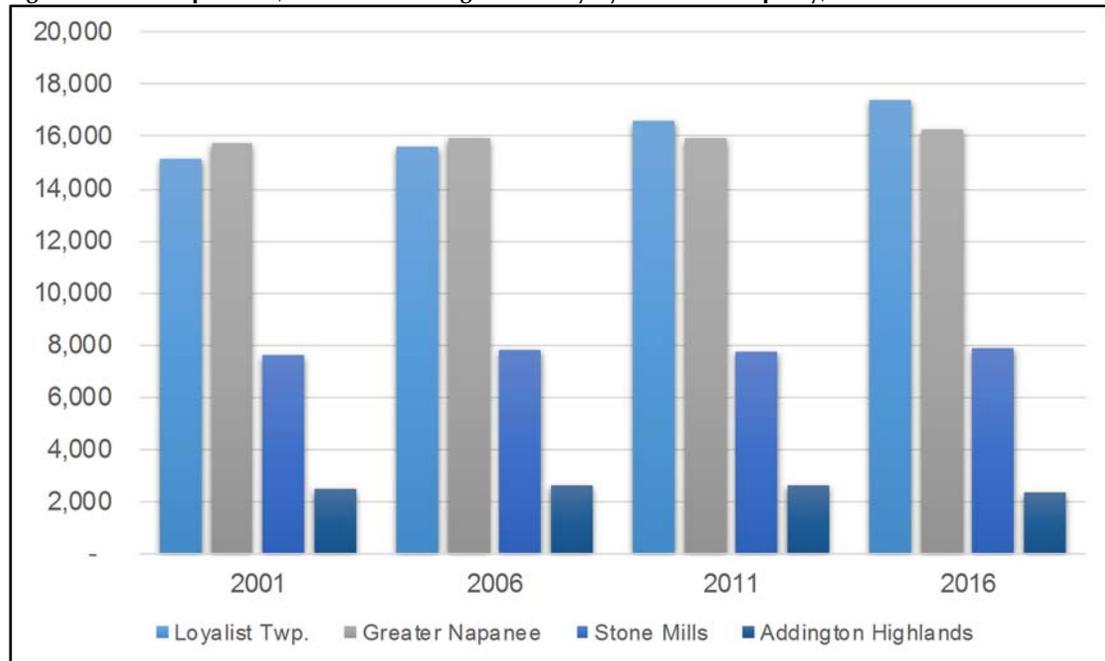
¹ Total population including Census Net Undercoverage

Table 2: Historical Occupied Household Growth, Loyalist Township, 2001-2016

Historical Households Loyalist Township, 2001 - 2016			
Year	Occupied Households	Growth	
		Net Change	Average Annual Growth Rate
2001	5,130		
2006	5,560	430	1.6%
2011	5,970	410	1.4%
2016	6,430	460	1.5%
2001-2016		1,300	1.7%

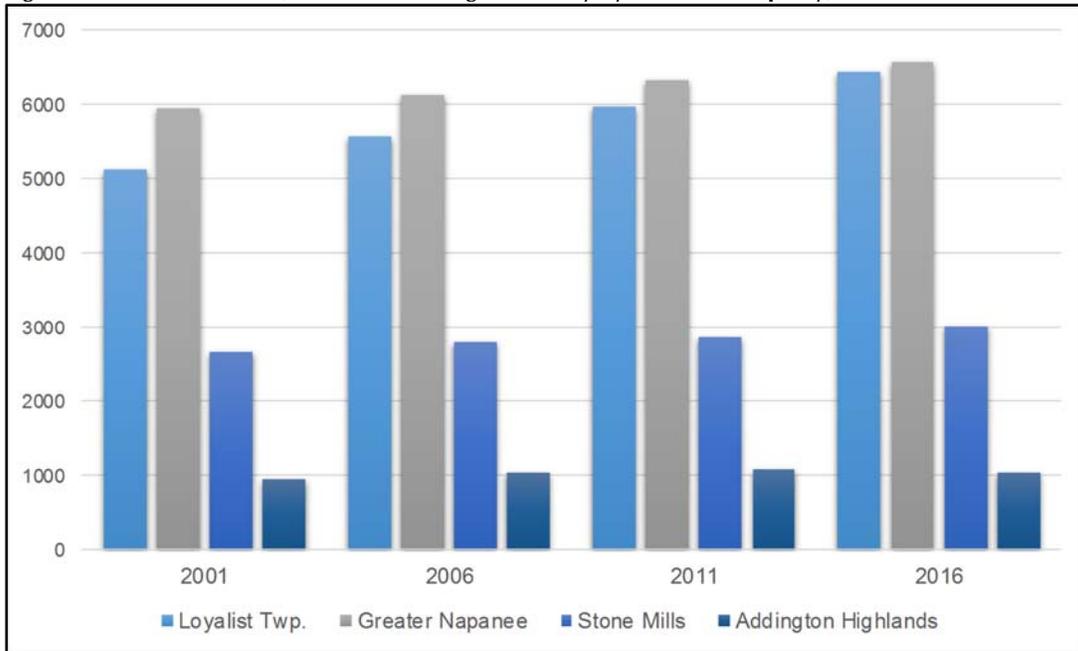
Source: Statistics Canada.

As of 2011, Loyalist became the largest population centre within the County of Lennox and Addington, modestly surpassing the Town of Greater Napanee in total population. The Township had a 2016 population of nearly 17,400 residents (total population including Census net undercoverage), which represents 40% of the County's population base. Greater Napanee, still however, maintains the largest housing and employment base in the County. The balance of the County Townships are more rural in nature by comparison to Loyalist and Napanee. The figures below illustrate total population, household and employment in Lennox & Addington from 2001 to 2016.

Figure 1: Total Population, Lennox & Addington County by Local Municipality, 2001-2016

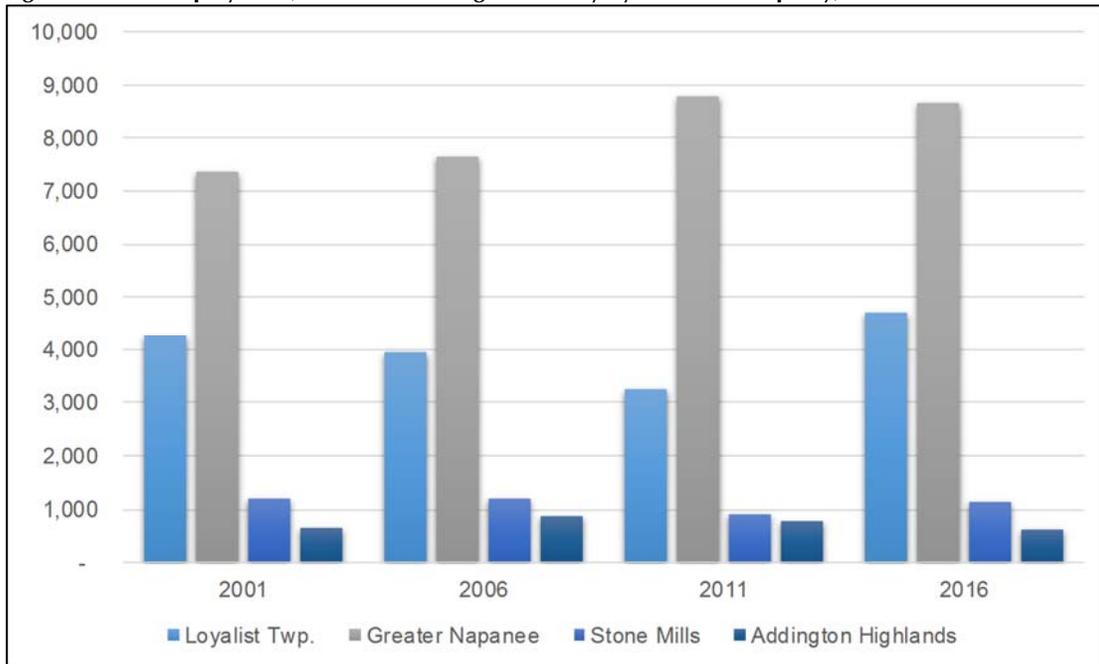
Source: Statistics Canada.

Figure 2: Total Households, Lennox & Addington County by Local Municipality, 2001-2016



Source: Statistics Canada.

Figure 3: Total Employment, Lennox & Addington County by Local Municipality, 2001-2016

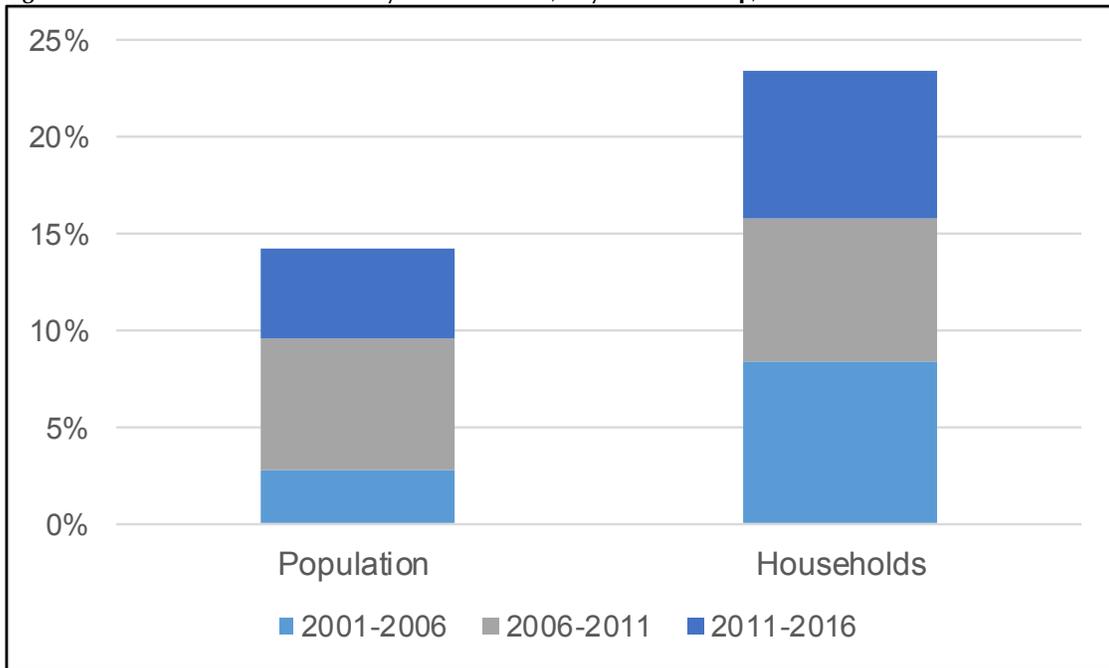


Source: Statistics Canada.

B. HOUSING GROWTH OUTPACING GROWTH IN POPULATION

The rate of housing growth in Loyalist has been outpacing population growth since 2001, owing to declining average household size, which is a result of demographic change underway in the Township. The different growth rates between population and households, as shown in Figure 4 is due in large part to an aging population, a demographic feature of Loyalist that mirrors most of Ontario, particularly in communities outside major urban centres. The aging population results in a declining average household size as older populations generally have households with more “empty nesters”, fewer children, and more single people due to divorce and widowing. The effect is that a greater number of housing units is required to house the same amount of population than if that population were younger. The sustained fall in average household size that has occurred in Loyalist is highlighted in Table 3.

Figure 4: Residential Growth Rates by Census Period, Loyalist Township, 2001-2016



Source: Hemson Consulting based on Statistics Canada information.

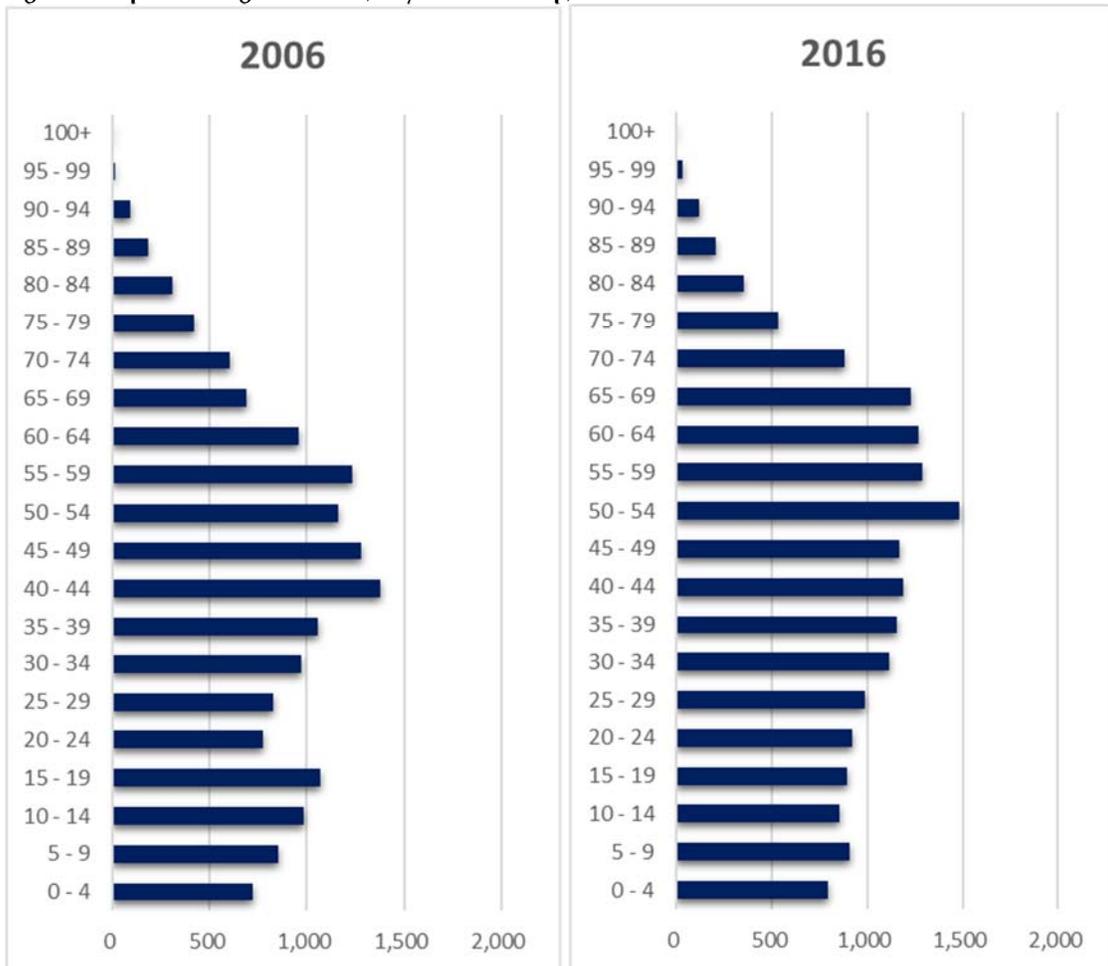
Table 3: Historical Average Household Size (Persons Per Unit)

Historical Average Household Size (Persons Per Unit), Loyalist Township, 2001-2016	
Year	Persons Per Unit
2001	2.66
2006	2.57
2011	2.53
2016	2.47

Source: Statistics Canada.

Figure 5 illustrates the change in the age structure of the population Loyalist since 2006. The aging demographic trend is anticipated to continue and is a key determining factor when forecasting future growth and change in the Township. Within the context of an aging population, the population would stabilize and begin to decline in the absence of in-migration.

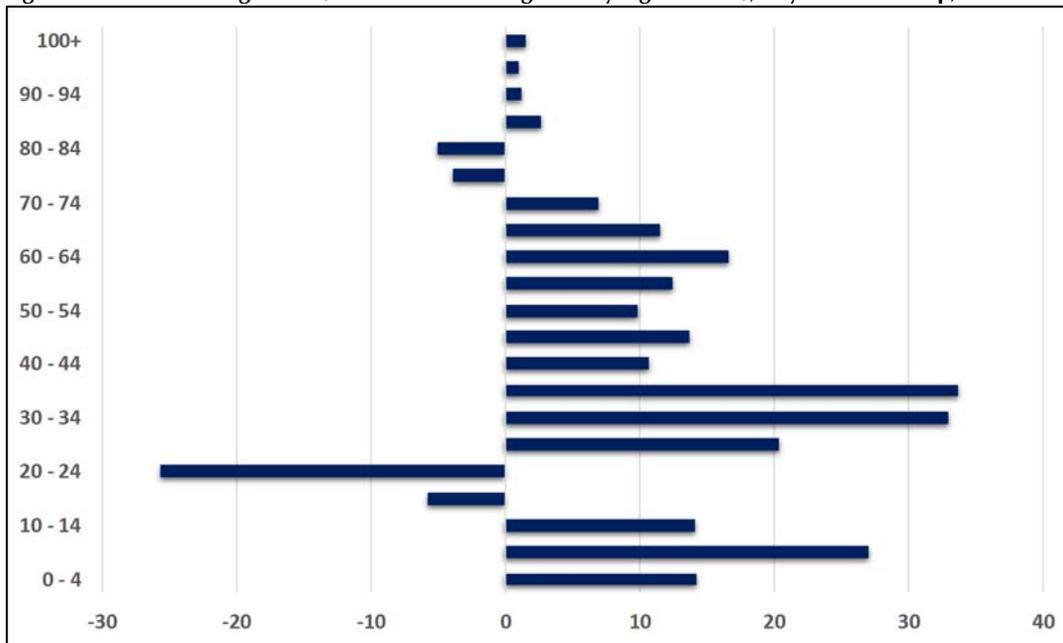
Figure 5: Population Age Structure, Loyalist Township, 2006-2016



Source: Hemson Consulting based on Statistics Canada information.

The age-structure of migrants is also a key consideration in understanding recent growth and change in Loyalist and assessing the future growth outlook. Figure 6 sets out annual net-migrants by age group over the 2006 to 2016 period. As shown, there is significant out-migration of younger aged adults, who are drawn to education and employment opportunities in larger urban centres. The pattern of some young adults leaving for the “big city” is common throughout the province with the recipient communities largely limited to the Greater Toronto Area and Ottawa.

Figure 6: Historical Migration (Number of Net Migrants by Age Cohort), Loyalist Township, 2006-2016



Source: Hemson Consulting based on Statistics Canada information.

C. TOWNSHIP EXPERIENCED MODERATE NET EMPLOYMENT GROWTH SINCE 2001 WITHIN SHIFTING ECONOMIC BASE

Employment in Loyalist has been variable over the last three Census periods, with significant declines in total employment in the 2000’s followed by significant growth in total employment over the most recent 2011 to 2016 period. Following the publication of Loyalist’s last projections in 2008, Ontario was impacted by the 2008 to 2009 global recession and the significant economic shifts that followed. The changes over this period resulted in noteworthy shifts in employment activity, which have had significant implications on the outlook for various economic sectors and employment land uses within Loyalist and the broader County of Lennox & Addington and Kingston CMA.

Table 4 indicates change in total employment in Loyalist since 2001. As shown, the Township's employment base increased by 460 net jobs between 2001 and 2016 within the context of a shifting economic base and employment decline in both Census periods between 2001 and 2011, offset by the notable growth over the most recent Census period.

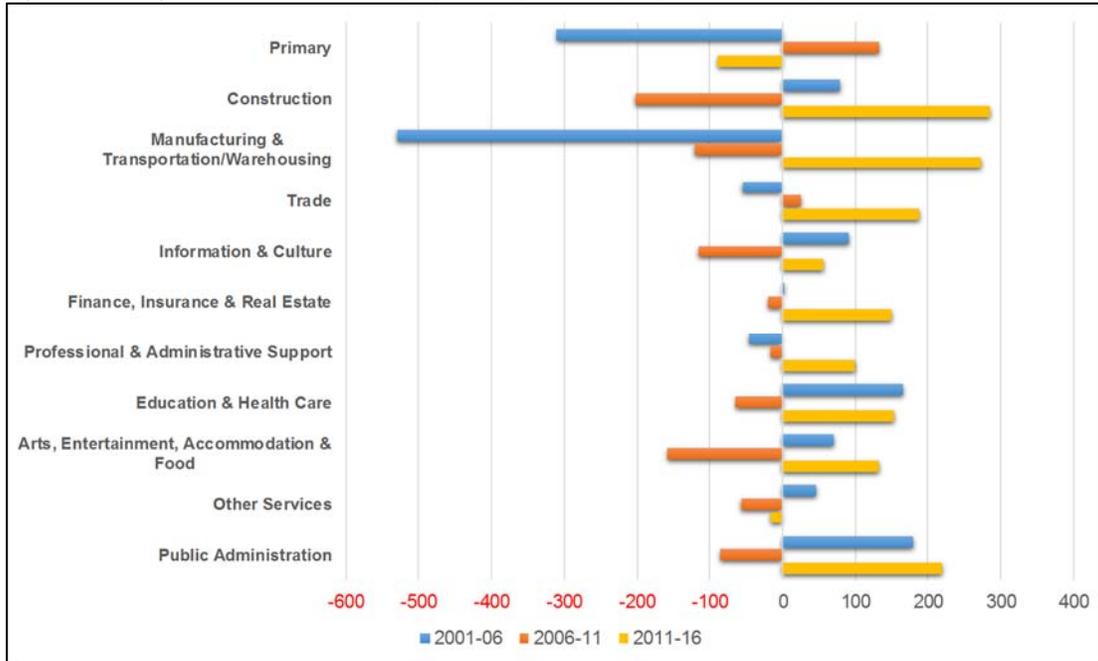
Table 4: Historical Place of Work Employment, Loyalist Township, 2001-2016

Historical Total Place of Work Employment Loyalist Township, 2001 - 2016			
Year	Total Place of Work Employment¹	Growth	
		Net Change	Average Annual Growth Rate
2001	4,250		
2006	3,940	(310)	-1.5%
2011	3,260	(680)	-3.7%
2016	4,710	1,450	7.6%
2001-2016		460	0.7%

¹ Place of Work employment refers to the number of jobs in Loyalist, irrespective of where the employee resides

As demographic change is affecting Loyalist's population and housing base, so too is economic change affecting opportunities for employment within the Township. Similar to communities throughout Ontario, Loyalist has experienced a significant increase in population-serving employment sectors, such as retail trade and healthcare. Growth in the public administration sector has also continued and accounts for Loyalist's largest employment sector, with over 900 jobs, most of which are related to correctional institutions located in Bath. Other sectors of note include Finance, Insurance and Real Estate, which more than tripled in terms of the number of total jobs since 2006, and Education, which declined by nearly one-third, losing over 100 jobs. The graphic below indicates net change in employment by sector for the three Census periods since 2001.

Figure 7: Change in Place of Work Employment by NAICS¹, Loyalist Township, 2006-2016



Source: Statistics Canada.

¹North American Industry Classification System.

For the purposes of assessing and forecasting employment growth and associated land needs, employment is divided into three land-use-based categories:

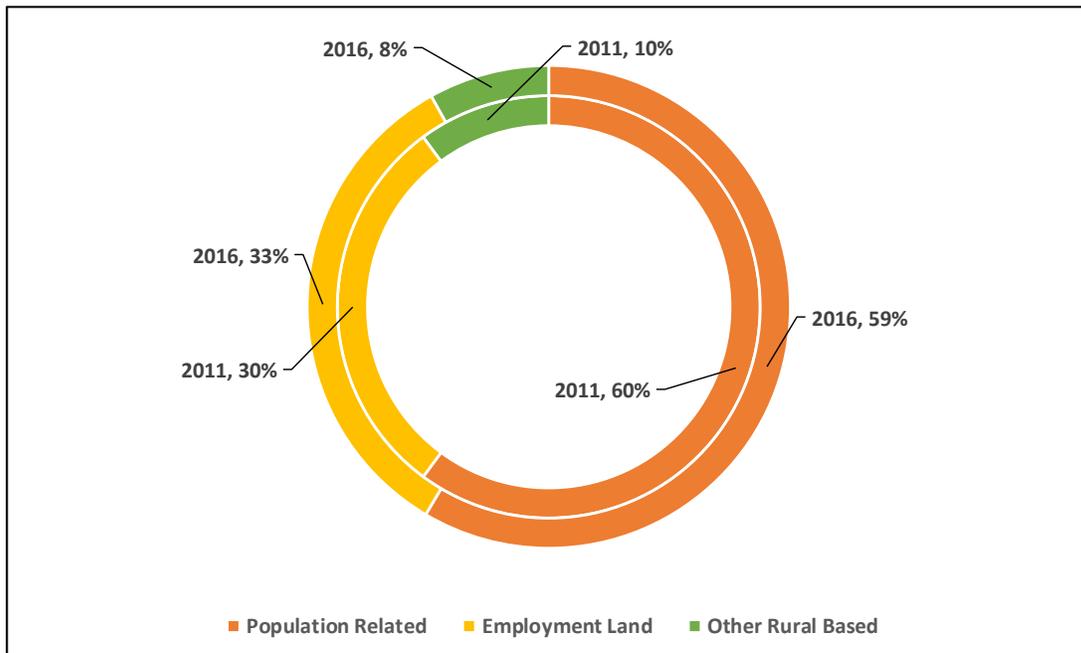
- Population-related Employment, which is employment that primarily serves a resident population and includes retail, education, healthcare, and local government. This generally grows in line with population growth and is located on a range of commercial and community area designations.
- Employment-land Employment, which refers to traditional industrial-type employment primarily accommodated in low-rise industrial buildings in business parks and employment areas. This is the type of employment that would locate on designated industrial lands.
- Other Rural-based Employment, which refers to jobs scattered throughout the rural area, primarily related to agricultural and primary industries.

Most of the Township's employment base continues to be in population-services with traditional industries also comprising a significant proportion the local job base. Table 5 indicates estimated employment by land use category in Loyalist since 2006 and Figure 8 illustrates the relative shares of employment by land-use based category in 2011 and 2016.

Table 5: Estimated Historical Employment by Type, Loyalist Township, 2006-2016

Estimated Historical Employment by Type Loyalist Township, 2006 - 2016				
	Population Related	Employment Land	Other Rural Based	Total
2006	2,300	1,320	320	3,940
2011	1,960	970	330	3,260
2016	2,750	1,570	380	4,710
2006-16	450	250	60	760
Annual				
2006-16	45	25	6	76
2006-16	2.0%	1.9%	1.9%	2.0%

Figure 8: Employment by Population-Serving, Traditional Industry and Rural-based, Loyalist Township, 2011 & 2016



Source: Hemson Consulting based on Statistics Canada information.

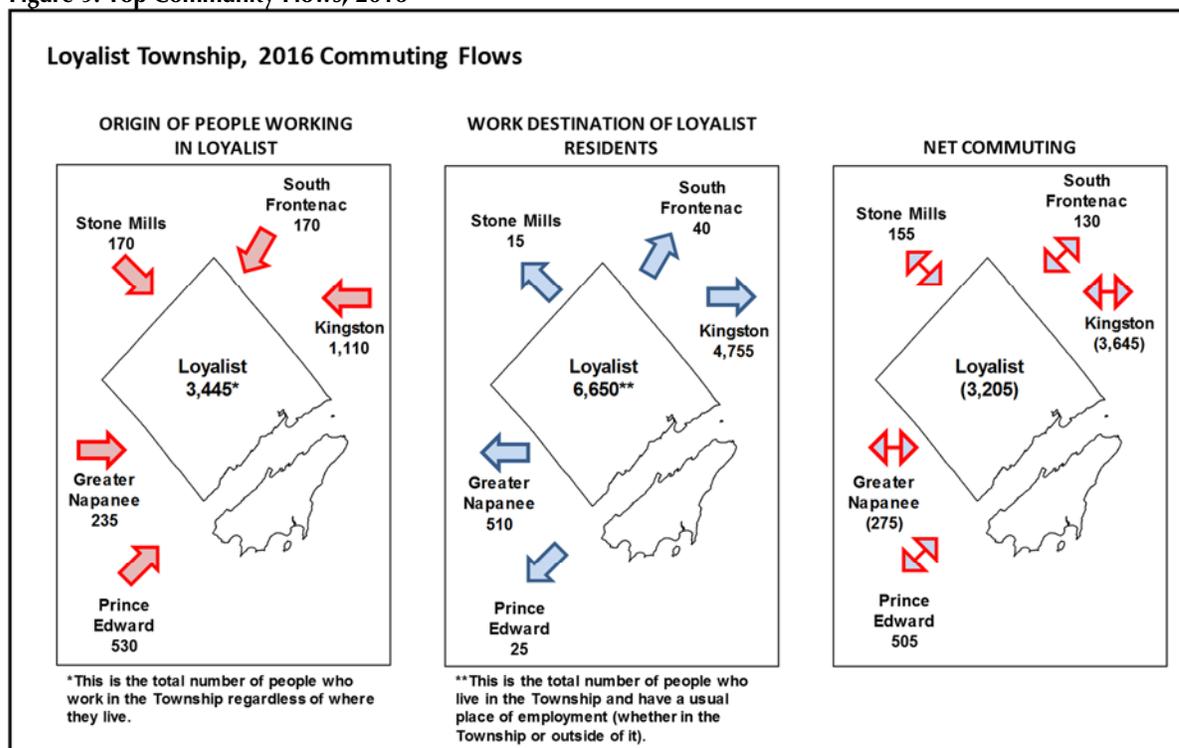
Loyalist exhibits a strong relationship with the surrounding region, most notably with the City of Kingston, and within Lennox & Addington, the Town of Greater Napanee. The Township experienced net out-commuting with the greatest number of Loyalist residents working in the City of Kingston. The next largest commuting flow is between Loyalist and Greater Napanee, the two most populous of Lennox & Addington municipalities. Table 6 and Figure 9 below indicate the largest commuting flows into and out of Loyalist in 2016.

Table 6: Commuting Patters, Loyalist Township, 2016

2016 Commuting Patterns, Loyalist Township			
Area	Number of People Commuting to Loyalist for Work	Destination of Loyalist Residents for Work	Net Commuting Flow
Belleville	75	100	-25
Greater Napanee	235	510	-275
Kingston	1,110	4,755	-3645
Ottawa	0	35	-35
Prince Edward	530	25	505
South Frontenac	170	40	130
Stone Mills	170	15	155
All Other Remaining Areas	165	180	-15
Total Commuters	2,455	5,660	-3205
Live and Work in Loyalist	990	990	0
Total Usual Place of Work	3,445	6,650	-3205

Source: Hemson Consulting based on Statistics Canada information.

Figure 9: Top Community Flows, 2016



Source: Hemson Consulting Ltd. based on Statistics Canada Place of Work and Resident Employment Labour Force data. The graphic illustrates the most significant flows of commuters into and out of the Township. 900 Loyalist residents both live and work within the Township. Note: Work at home employment is excluded from the above figures.

D. LOCAL DISTRIBUTION OF RECENT GROWTH WITHIN LOYALIST REINFORCES HISTORICAL PATTERNS

A key task of the projections study is to allocate forecast Township growth to community areas within Loyalist. Analysis was undertaken of recent growth and change within the communities of Amherstview, Bath and Odessa based on analysis of Census data at the Dissemination Area (DA) level, employing the sub-municipal study areas provided by the Township. Results are discussed below for population, households and employment at the local level within Loyalist.

The distribution of growth within Loyalist has been largely influenced by the location of communities in relation to the City of Kingston, with which the Township has significant commuting and resident migration flows. Within Loyalist, the community of Amherstview is the largest population settlement area and has continued to be the focal point of residential growth in the Township, accounting for roughly 70% of the net growth in population and household over the 2006-2016 timeframe. The Bath community also experienced growth over the last two Census periods, much more moderately during the latter 2011 to 2016 Census period. Odessa has remained relatively constant in total population between 2006 and 2016.

Background review of servicing and land supply in Loyalist suggests the housing supply in the Township has historically been affected by local public infrastructure and servicing constraints, some of which may have been alleviated in recent years, enabling future development should the market demand be realized. In particular, this may positively affect the future growth prospects for the Odessa community, where the adjacency to the Highway 401 would suggest an ideal location, particularly for residents commuting to Kingston and other parts of Lennox & Addington and central Eastern Ontario; as well as for employment lands.

Employment within in the Township is also largely concentrated in the Amherstview community, which accounted for nearly half of the net growth in employment in Loyalist between 2006 and 2016; however each study area within the Township did experience employment growth over the latter 2011-2016 period. The net decline in employment during the 2001 to 2011 period were more than compensated for over the most recent Census period. Much of the employment based in Loyalist is attributed to the significant institutional uses within the Township. Tables 7, 8 and 9 below indicate estimated total population, households and employment as well as net change during the last two Census periods, average annual growth and growth rates.

Table 7: Historical Total Population, Loyalist Township by Sub-Municipal Areas, 2006-2016

Historical Total Population					
Loyalist Township by Sub-Municipal Areas, 2006 - 2016					
	Amherstview	Bath	Odessa	Rural*	Loyalist Township
2006	7,890	2,760	1,270	3,650	15,570
2011	8,410	3,340	1,250	3,640	16,640
2016	9,150	3,420	1,270	3,540	17,380
2006-2011	520	580	-20	-10	1,070
2011-2016	740	80	20	-100	740
Annual Avg. 2006-16	126	66	0	-11	107
Avg. Annual 10-yr Growth Rate	1.6%	2.4%	0.0%	-0.3%	1.2%

*Rural includes Ernstown and Amherst Island

Source: Hemson Consulting based on Statistics Canada Information.

Table 8: Historical Occupied Households, Loyalist Township by Sub-Municipal Areas, 2006-2016

Historical Occupied Households					
Loyalist Township by Sub-Municipal Areas, 2006 - 2016					
	Amherstview	Bath	Odessa	Rural*	Loyalist Township
2006	2,870	950	460	1,290	5,570
2011	3,150	1,030	470	1,320	5,970
2016	3,450	1,150	490	1,340	6,430
2006-2011	280	80	10	30	400
2011-2016	300	120	20	20	460
Annual Avg. 2006-16	58	20	3	5	40
Avg. Annual 10-yr Growth Rate	2.0%	2.1%	0.7%	0.4%	1.5%

*Rural includes Ernstown and Amherst Island

Source: Hemson Consulting based on Statistics Canada Information.

Table 9: Estimated Historical Total Employment, Loyalist Township, 2006-2016

Estimated Historical Total Employment					
Loyalist Township by Sub-Municipal Areas, 2006 - 2016					
	Amherstview	Bath	Odessa	Rural*	Loyalist Township
2006	1,820	910	420	770	3,920
2011	1,510	750	350	640	3,250
2016	2,180	1,090	510	920	4,700
2006-2011	-310	-160	-70	-130	-670
2011-2016	670	340	160	280	1,450
Annual Avg. 2006-16	36	18	9	15	-67
Avg. Annual 10-yr Growth Rate	2.0%	2.0%	2.1%	1.9%	2.0%

*Rural includes Ernstown and Amherst Island

Source: Hemson Consulting based on Statistics Canada Information.

Analyses of local demand, land supply and servicing capacities to accommodate growth helped to inform allocations of forecast growth within the Township, provided later in this report. The allocations are based on the results of the evaluation and taking into account consultation with key stakeholders and Township staff.

III FORECASTS ARE FOR MODERATE RESIDENTIAL AND EMPLOYMENT GROWTH TO 2046

This section sets out the method and key assumptions that were used in the Loyalist Township forecast and provides the results of the population, household and employment forecasts by five-year Census intervals, from a 2016 base to 2046. The forecasts for Loyalist are considered in the larger context of trends influencing growth, change across the economic region, and incorporate all currently available data on existing development, population and employment in the Township.

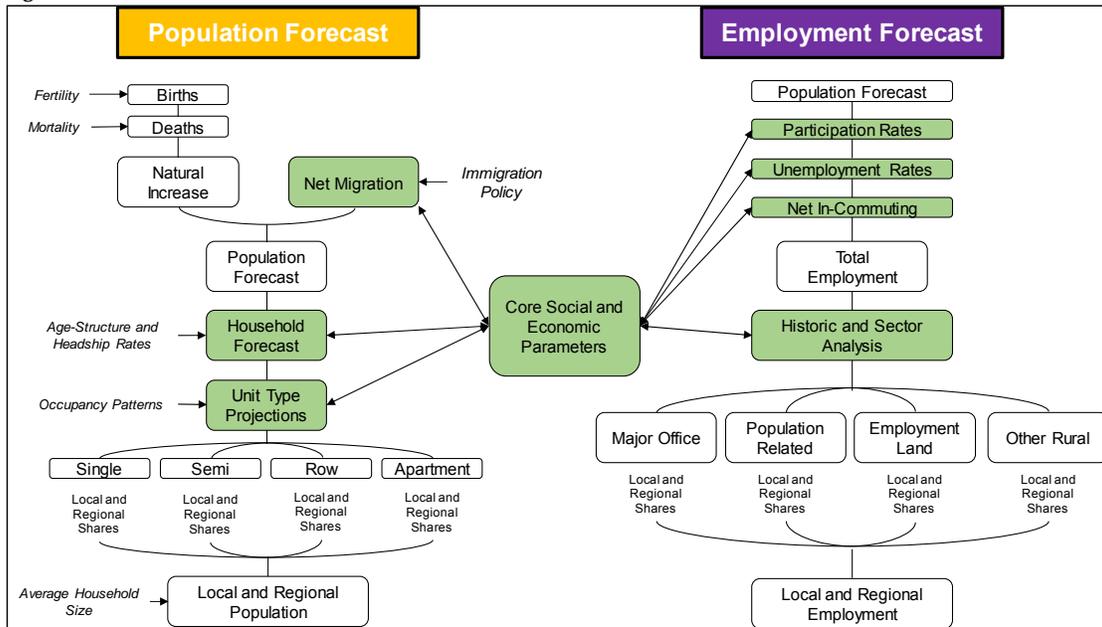
The growth forecasts were prepared using Hemson's well-established forecast modeling techniques based on Provincial forecasting and planning policy guidelines and rooted in the broader economic and demographic outlook for the Province and Eastern Ontario. This is combined with a locally-based economic and demographic outlook that takes account of local conditions. Taking into account prior forecasts and the role of Loyalist within the Kingston Census Metropolitan Area (comprising Loyalist, the Frontenac Islands, South Frontenac and the City of Kingston), the County of Lennox & Addington and the broader Eastern Ontario region, projections of population, housing and employment growth to a 2046 horizon have been prepared.

Three forecast scenarios were prepared incorporating varied assumptions about the Township's future economic outlook – a low, reference and high growth scenario – based on assumptions about varying levels of future in-migration to Loyalist. The reference scenario represents the most likely outcome and is, in our view, an appropriate basis for planning.

A. FORECAST METHOD AND ASSUMPTIONS

The forecasts of population, households and employment are based upon the well-established standard cohort-survival forecast model. The forecast method is illustrated in Figure 10 below.

Figure 10: Forecast Method



The approach begins by forecasting population, housing and employment for the Kingston CMA, Lennox & Addington and Loyalist based on national and provincial economic and demographic trends. The results of the forecast are then distributed to communities within Loyalist based on households and shares of Township-wide housing growth.

The forecasts are prepared by applying a set of principal assumptions within the forecast model related to Ontario's economic future and its social context. This set of core economic and social parameters include: the broader outlook and composition of the Ontario economy; migration and settlement patterns, such as national immigration policies and increasing concentration in urban centres; and demographic change, such as aging of the population. The forecasts of Loyalist's population, household and employment growth begin with these core economic and social parameters.

The current broad economic and demographic trends are expected to continue over the forecast horizon. The Ontario economy is expected to continue to grow at a moderate pace over the coming decades, consistent with average rates of growth over recent decades. This growth will occur within the context of a continued small shift towards a population-related employment in a more service-sector-based economy, owing to higher levels of population growth and the transition in the broader Ontario

economy to services. At the same time, in Loyalist, employment land employment is expected to continue to represent a significant share of the employment base.

Migration has come to represent the largest share of population growth throughout Ontario; levels of natural increase continue to decline and in many areas are now negative. This is due to the decrease in fertility rates and the general aging of the population. However, the baby boom echo (millennial) population is now entering its peak child-bearing years, so there will be a significant number of births as the “echo-echo” generation is born. Once that is complete, there is little natural increase likely in most populations.

Growth in Loyalist will continue to be largely dependant on intra-provincial migration and most greatly influenced by the Townships’s proximity to the City of Kingston and adjacency to Ottawa Region. By the 2030s, due to the aging demographic and fertility rates below replacement, the population of Loyalist would decline without net in-migration. The natural decrease in the base population will in part, counterbalance the population growth generated by in-migrants seeking new housing.

While Loyalist and Lennox & Addington as a whole are likely to continue to experience the out-migration of some young adults, it will be balanced by in-migration of that age group from other areas and by a large net in-migration of those in their 30s and 40s, seeking (mostly) family-oriented housing. The Township is forecast to experience modest net in-migration over the forecast.

The forecast results which follow represent a best estimate of future growth and change based on the most current available data and assumptions about past and future economic and demographic conditions. Given an inherent uncertainty in long-term demographic and economic forecasting, regular reviews are prudent and it is recommended that the forecasts be revisited at each five-year official plan review. The forecasts are prepared by five-year intervals corresponding with the Census from a 2016 base to a 2046 horizon.

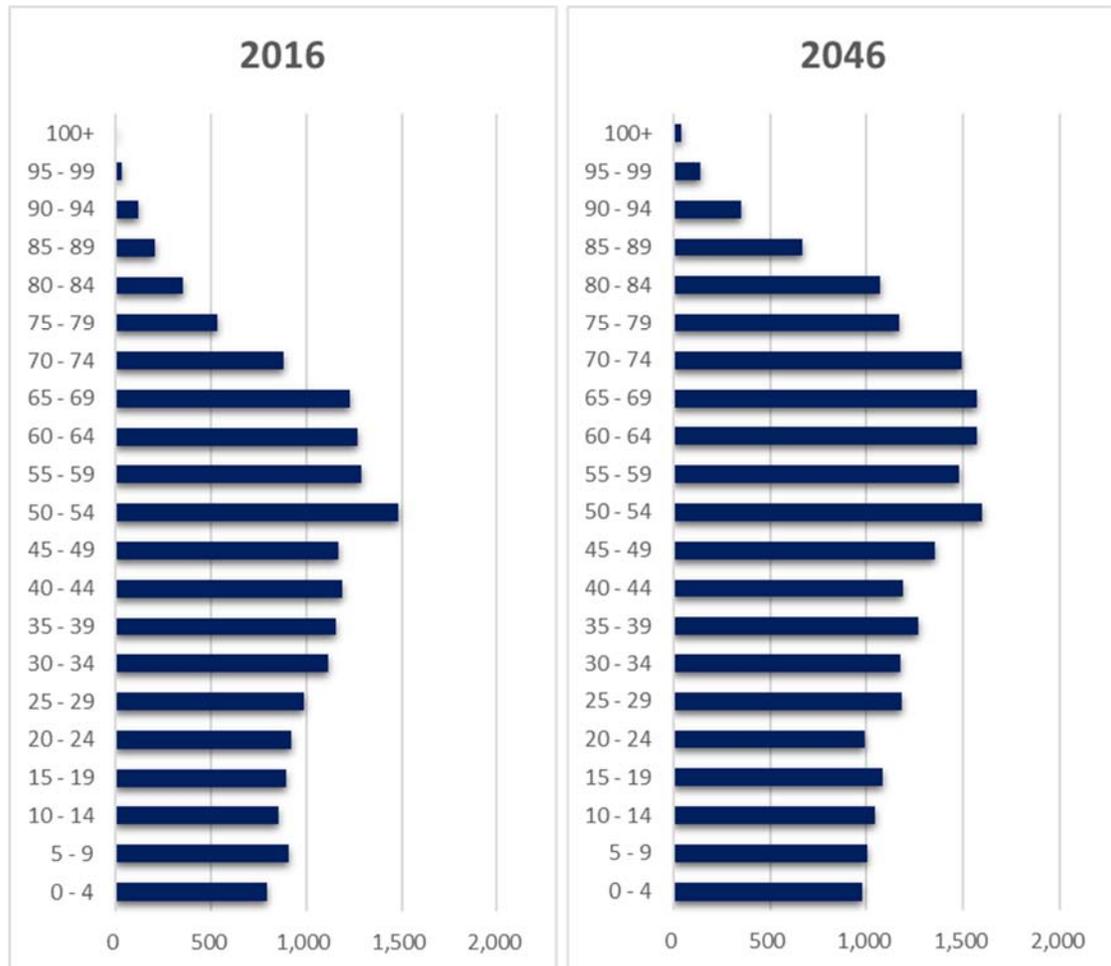
The forecast results indicate moderate growth in population over the period from 2016 to the 2046 planning horizon. Housing growth is anticipated to continue to out-pace population due to declining average household size.

A key consideration in forecasting future growth in Loyalist is the aging demographic trend. As described earlier, the Township, like many communities in Ontario, is experiencing an aging population, which has important implications in planning for

future growth and development and is a key consideration in the projection update for a number of reasons including: an aging population requires different forms of housing and age affects labour participation rates.

The graphic below illustrates the age structure of the population at 2016 and as anticipated at 2046¹.

Figure 11: Current and Forecast Population Age Structure, Loyalist Township, 2016 & 2046



Source: Hemson Consulting Ltd. using data from Statistics Canada Census, 2016; Hemson, forecast.

¹ For the purpose of the age structure forecasts, the institutional populations of the Millhaven and Bath correctional facilities are treated separately in order to account for the disproportionate number of males in the 25-40 year age cohorts.

The aging demographic trend is anticipated to continue and is a key determining factor when forecasting future growth and change in the County. Within the context of an aging population, the population would stabilize and begin to decline in the absence of in-migration.

B. THREE FORECAST SCENARIOS HAVE BEEN PREPARED

Three forecast scenarios – a low, reference and high outlook – based on varied assumptions about future migration patterns and economic conditions, have been prepared. The reference is in our view, the most likely outcome and is based on an assumption of lower net out-migration of young adults than the Township has experienced over the recent decade. The high scenario was developed to test the effects of reduced out-migration of young adults and higher in-migration for most other age groups. The low scenario would represent a continuation of current out-migration patterns and reduced labour force participation over the forecast horizon.

The outlook for housing is affected by an aging population. However, housing will grow at a faster rate than population because more households are needed to accommodate the same population as it ages: there are more empty nesters and single elderly people and fewer families with children at home. This results in a gradual decline in the average household size over the forecast horizon. Table 10 below indicates historical and continued change in average household size anticipated to occur over the forecast horizon to 2046.

Table 10: Historical & Forecast Average Household Size (Persons Per Unit)

Historical and Forecast Average Household Size (Persons Per Unit) Loyalist Township, 2001 - 2046	
Year	Persons Per Unit
2001	2.66
2006	2.57
2011	2.53
2016	2.47
2021	2.42
2026	2.36
2031	2.29
2036	2.24
2041	2.20
2046	2.15

Moderate employment growth is expected to continue over the forecast horizon, reflecting changes in labour force participation related to the aging population; and a continued shift to services-based sectors and continued most growth in traditional industry employment.

The results are provided below.

- From a current (2016) total population of 17,390, the Township's population in the first 20 years of the forecast to 2036 could range from a low of 18,310, to a mid-range total of 22,260 under the reference scenario, or even to a high of 22,500 should economic conditions and migration to the City, notably by young adults, significantly change.
- In the final 10 years of the forecast to 2046, the effect of aging and fewer births and death result in a slowing of growth in the low scenario to a population of 18,350 and in the reference scenario to 22,600.
- The high scenario results in continued growth after 2036 with a 2046 population of 23,780.

Summary results by forecast scenario for population, households and total place of work employment are shown below.

Table 11: Summary Results by Forecast Scenario, Loyalist Township, 2016-2046

Summary Results by Forecast Scenario Loyalist Township, 2016-2046				
	2016	2046		
		Forecast Scenario		
		Low	Reference	High
Population*	17,390	18,320	22,600	23,280
Households	6,430	7,240	9,730	10,360
Employment	4,710	4,960	6,140	6,330

*Total Population Including Census Net Undercoverage

Detailed results of the reference scenario for population, households and employment are provided in the table that follows. Forecasted growth by community within Loyalist is further estimated by Census Tract within Loyalist for the purposes of local servicing and infrastructure planning. Results for the 2016 to 2046 forecast period is provided by Attachment.

Table 12: Historical and Forecast Population, Occupied Households and Total Employment Reference Scenario, Loyalist Township, 2001-2046

Historical and Forecast Population, Occupied Households and Total Employment Reference Scenario Loyalist Township, 2001 - 2046						
	Total Population	Growth	Occupied Households	Growth	Total Employment	Growth
2001	15,140		5,130		4,250	
2006	15,570	430	5,560	430	3,940	-310
2011	16,630	1,060	5,970	410	3,260	-680
2016	17,390	760	6,430	460	4,710	1,450
2021	18,390	1,000	6,960	530	4,980	270
2026	19,450	1,060	7,570	610	5,260	280
2031	20,430	980	8,210	640	5,530	270
2036	21,260	830	8,740	530	5,760	230
2041	21,960	700	9,200	460	5,960	200
2046	22,600	640	9,730	530	6,140	180
Periods						
2001-16		2,250		1,300		460
2016-31		3,040		1,780		820
2031-46		2,170		1,520		610
2016-46		5,210		3,300		1,430
Annual						
2001-16		150		87		31
2016-31		203		119		55
2031-46		145		101		41
2016-46		174		110		48
2001-16		1.0%		1.7%		0.7%
2016-31		1.2%		1.8%		1.2%
2031-46		0.7%		1.2%		0.7%
2016-46		1.0%		1.7%		1.0%

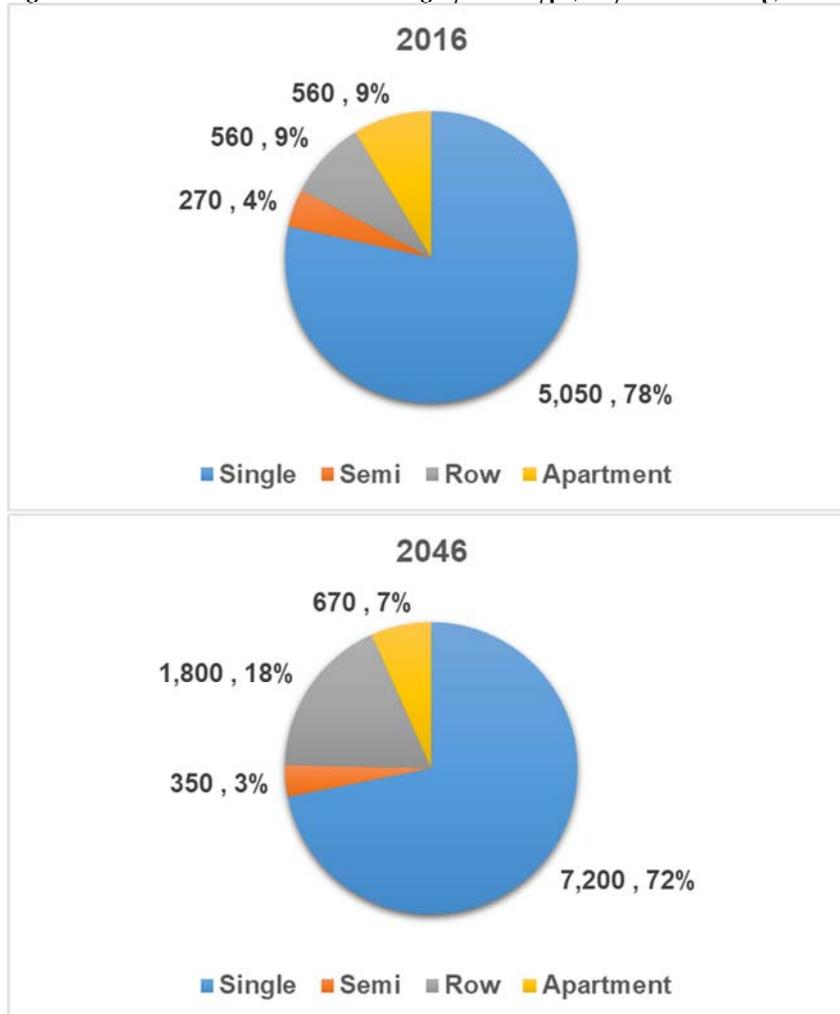
Note: Total Population includes Census Net-Undercoverage.

Table 13 below indicates historical and forecast housing by unit type. The general pattern of residential development is anticipated to continue over the forecast horizon, with single-detached dwellings continuing to be the dominant housing form, within the context of a moderate increase in the relative proportion of rowhouses in the overall housing unit mix at 2046, as shown in Figure 12.

Table 13: Historical and Forecast Housing by Unit Type, Loyalist Township, 2001-2046

Historical and Forecast Housing by Unit Type, Loyalist Township, 2001-2046				
Year	Housing by Unit Type			
	Single/Semi	Row	Apts	Total
2001	4,160	400	570	5,130
2006	4,630	350	580	5,560
2011	4,990	400	580	5,970
2016	5,310	560	560	6,430
2021	5,590	790	580	6,960
2026	5,910	1,050	610	7,570
2031	6,270	1,310	630	8,210
2036	6,570	1,520	650	8,740
2041	6,830	1,700	670	9,200
2046	7,140	1,910	680	9,730
2016-2046	1,830	1,350	120	3,300

Figure 12: Current and Forecast Housing by Unit Type, Loyalist Township, 2016-2046



The forecasts are considered within the context of prior forecasts for the Township. In this regard, it is noted that:

- The forecasts prepared for the Township in 2009 were based on 2006 Census data and forecast a Census population of 16,380 (16,870 total including Census net undercoverage) at 2016 and 18,550 Census (19, 110 with undercount) at a 2031 forecast horizon, under a “medium” scenario.
- The current forecasts are based on 2016 Census data and extend the forecast horizon to 2046. As of 2016, the Township had a total population of 17,390. This is 520 residents more than was forecast for 2016 in the prior forecast study. The current reference forecasts are for 20,430 total population at 2031, higher than the prior forecasts but taking into account recent growth and development and based on the most current understanding of demographic and economic trends affecting the growth outlook for Loyalist.

C. SUB-MUNICIPAL GROWTH ALLOCATIONS

Allocations of the reference forecast scenario growth to community areas within Loyalist are presented below. The allocations take into account historical development patterns within the Township, recent growth and change and land supply and servicing capacity. The general distribution within Loyalist is anticipated to continue through the forecasts. The allocations were provided in draft for review by Township Staff and presented to Loyalist Council in June 2019. The local allocations of the Township-wide forecasts of population, households and total place of work employment are shown in Tables 14 to 17.

Table 14: Forecast Population, Households and Total Employment, Amherstview, 2001-2046

Forecast Population, Occupied Households and Total Employment Reference Scenario Amherstview, 2016 - 2046						
	Total Population	Growth	Occupied Households	Growth	Total Employment	Growth
2016	9,150		3,450		2,180	
2021	9,760	610	3,770	320	2,330	150
2026	10,450	690	4,150	380	2,510	180
2031	11,040	590	4,510	360	2,640	130
2036	11,510	470	4,780	270	2,750	110
2041	11,960	450	5,030	250	2,830	80
2046	12,400	440	5,310	280	2,950	120
2016-31		1,890		1,060		460
2031-46		1,360		800		310
2016-46		3,250		1,860		770

Table 15: Forecast Population, Households and Total Employment, Bath, 2001-2046

Forecast Population, Occupied Households and Total Employment Reference Scenario Bath, 2016 - 2046						
	Total Population	Growth	Occupied Households	Growth	Total Employment	Growth
2016	3,420		1,150		1,090	
2021	3,710	290	1,310	160	1,190	100
2026	3,980	270	1,480	170	1,290	100
2031	4,270	290	1,690	210	1,410	120
2036	4,540	270	1,890	200	1,490	80
2041	4,740	200	2,060	170	1,580	90
2046	4,890	150	2,250	190	1,630	50
2016-31		850		540		320
2031-46		620		560		220
2016-46		1,470		1,100		540

Table 16: Forecast Population, Households and Total Employment, Odessa, 2001-2046

Forecast Population, Occupied Households and Total Employment Reference Scenario Odessa, 2016 - 2046						
	Total Population	Growth	Occupied Households	Growth	Total Employment	Growth
2016	1,270		490		510	
2021	1,320	50	510	20	560	50
2026	1,370	50	540	30	600	40
2031	1,430	60	580	40	650	50
2036	1,480	50	620	40	690	40
2041	1,520	40	650	30	750	60
2046	1,550	30	690	40	760	10
2016-31		160		90		140
2031-46		120		110		110
2016-46		280		200		250

Table 17: Forecast Population, Households and Total Employment Reference Scenario, Amherst Island and Rural Area, 2001-2046

Historical and Forecast Population, Occupied Households and Total Employment Reference Scenario Amherst Island and Rural Area, 2001 - 2046						
	Total Population	Growth	Occupied Households	Growth	Total Employment	Growth
2016	3,540		1,340		920	
2021	3,600	60	1,370	30	900	(20)
2026	3,650	50	1,400	30	860	(40)
2031	3,690	40	1,430	30	830	(30)
2036	3,730	40	1,450	20	830	-
2041	3,740	10	1,460	10	800	(30)
2046	3,760	20	1,480	20	800	-
2016-31		150		90		(90)
2031-46		70		50		(30)
2016-46		220		140		(120)

IV CONCLUSIONS AND RECOMMENDATIONS

This report provides an overview of growth and change in Loyalist and discusses key demographic and economic trends affecting the future growth outlook for the Township. The results of the population, housing and employment forecasts from a 2016 base to a 2046 horizon and local allocations of growth to the Amherstview, Odessa, Bath communities, Amherst Island and the rural area have also been prepared.

Key study conclusions include:

- Loyalist experienced moderate growth in population and households over recent Census periods, adding 2,250 residents and 1,300 households between 2001 and 2016. The rate of housing growth has been outpacing population growth, owing to declining average household size, which is a result of key demographic change underway. Within the context of the aging population, population would stabilize and begin to decline in the absence of in-migration.
- The Township's employment base increased by 460 net jobs between 2001 and 2016 within the context of a shifting economic base and employment decline in both Census periods between 2001 and 2011, followed by significant growth over the most recent Census period.
- The forecasts are of moderate growth in population over the period from 2016 to the 2046 planning horizon. Housing growth is anticipated to continue to out-pace population due to declining average household size. Modest employment growth is also expected to continue over the forecast horizon, reflecting changes in labour force participation related to the aging population and a continued shift to services-based sectors and some growth in traditional industry employment
- The distribution of growth within Loyalist has been largely influenced by the location of communities in relation to the City of Kingston. Within Loyalist, the community of Amherstview is the largest population settlement area and the focal point of residential growth. The Bath community also experienced growth over recent Census periods, much more moderately between 2011 and 2016; while population in Odessa has remained relatively stable. The historical pattern within Loyalist is anticipated to continue through the forecasts, reflected in the local allocations of growth.
- The draft forecast results were presented at Public Information Centre and to Township Council on June 24, 2019. Minor refinements to the forecasts were made following however the overall growth outlook to 2046 remains consistent with the draft forecasts.

The reference growth scenario provided herein represents the recommended population, housing and employment forecasts for planning and growth management in the Township.

Regular forecast review and update is prudent, given inherent uncertainty in forecasting. It is recommended that the Township continue to monitor growth and development and review the forecasts at regular intervals as new information becomes available.