



Growth Analysis Study, 2016 to 2046

Township of South Frontenac

Final Draft

November 2020

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List of Acronyms and Abbreviations (Cont'd)

List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
G.G.H.	Golden Greater Horseshoe
G.M.S.	Growth Management Strategy
MPAC	Municipal Property Assessment Corporation
N.F.P.O.W.	No Fixed Place of Work
O.P.	Official Plan



Executive Summary



Executive Summary

Watson & Associates Economists Ltd. (Watson) was retained by the Township of South Frontenac in the winter of 2019 to undertake an assessment of the Township's growth potential by settlement area to the year 2046. More specifically, this study provides the following:

- A brief discussion of regional and local growth drivers within Frontenac County and the Township of South Frontenac;
- An employment forecast by major sector from 2016 to 2046;
- Forecast growth trends in population and housing by structure type (i.e. singles/semi-detached, townhouses and apartments) including trends related to seasonal population and housing on a Township-wide basis; and
- An allocation of population, housing and employment growth between 2016 to 2046, by settlement areas and rural area.

The primary objective of this report is to assess the amount, type and location of population and employment growth within South Frontenac to the year 2046. This analysis will serve as a technical background document to the Township's growth management strategy (G.M.S.) and Official Plan (O.P.) review.

It is important to note that Frontenac County recently undertook a review of its long-term population, housing and employment growth projections, which was completed in January 2020, hereafter referred to as the 2020 Frontenac County Growth Analysis Study.¹ This County-wide analysis provides a range of long-term growth scenarios to the year 2046 as well as an allocation of the preferred residential growth forecast by Area Municipality. The growth analysis carried out for South Frontenac as part of this study largely focuses on the allocation of residential and non-residential development throughout the Township by settlement area and remaining rural area.

The following provides a summary of the key findings of this report with respect to forecast population, housing and employment trends for South Frontenac:

¹ Population, Housing and Employment Projections Study. County of Frontenac. Final Report. January 20, 2020. Watson & Associates Economists Ltd.



Regional and Local Economic Growth Drivers

- Economic growth in South Frontenac is closely tied to the City of Kingston. The proximity of South Frontenac to the Kingston area employment market represents a key driver of permanent population growth and the distribution of local housing demand;
- Regional and local employment growth opportunities will continue to drive housing and population development in the Township, as individuals largely seek competitively priced, ground-oriented housing within reasonable commuting distance to the City of Kingston;
- The Township of South Frontenac is characterized by a blend of expansive rural lands and settlement areas. The existing employment base is concentrated in retail, small to medium-scale industrial and commercial businesses and home occupations, government and education, accommodation and food services, agriculture and tourism. Growth opportunities within the Township's local employment base also represent a key driver of future housing demand and population growth; and
- Quality of life attributes offered in South Frontenac are also expected to drive net migration from a broad range of demographic groups, including first time home buyers, families, empty nesters and seniors. The Township of South Frontenac's rural character, proximity to the City of Kingston and access to a wide range of recreational opportunities represents a draw to both new residents and businesses.

Employment Growth Forecast

- The Township's employment base is expected to increase by approximately 1,100 jobs between 2016 and 2046, increasing from 3,300 to 4,400. This represents an annual growth rate of 1% over the 30-year forecast period;
- Employment growth in work at home and no fixed place of work (N.F.P.O.W.) categories is forecast to account for the majority of all job growth in South Frontenac;
- Population-related employment (commercial/institutional including work at home and N.F.P.O.W. employment) is anticipated to generally follow population growth. Alongside commercial employment growth in Inverary, the settlement areas of



Hartington and Harrowsmith have potential to facilitate highway commercial employment uses;

- The majority of Industrial employment growth is forecast to occur in primary settlement areas with some opportunity for rural development. The settlement area of Sydenham has potential for light industrial growth on municipal water services; and
- The Inverary employment area also represents a marketable location to facilitate the bulk of forecast industrial employment.

Residential Growth Forecast

- The Township of South Frontenac permanent population base is forecast to increase over the next 30 years, from approximately 19,100 in 2016 to 23,800 in 2046.¹ This represents an annual growth rate of approximately 0.7%;
- Over the 2016 to 2046 forecast period, new housing growth is forecast to be comprised of 90% low-density (singles and semi-detached), 4% medium-density (townhouses) and 6% high-density (apartments);
- Compared to historical trends, housing growth is forecast to shift more towards settlement areas between 2016 to 2046. This shift is anticipated to be largely driven by the aging of the population, local desire for more housing options within settlement areas, opportunities in primary settlement areas for communal serving and continued upward pressure on local housing prices;
- Housing growth in settlement areas is anticipated to be concentrated in the primary areas of Inverary, Sydenham and Verona; and
- Rural areas are forecast to contain 40% of all new permanent unit growth. This rural share of growth increases when also considering dwelling unit conversions from permanent to seasonal occupancy as well as demand for new seasonal dwellings.

¹ Population figures include an upward adjustment of approximately 2.3% to account for the net Census undercount.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson) was retained by the Township of South Frontenac in the winter of 2019 to undertake an assessment of the Township's growth potential to the year 2046. More specifically, this study provides the following:

- A brief discussion of regional and local growth drivers within Frontenac County and the Township of South Frontenac;
- A long-term employment forecast by major sector;
- Forecast growth trends in population and housing by structure type (i.e. singles/semi-detached, townhouses and apartments) including trends related to seasonal population and housing on a Township-wide basis; and
- An allocation of population, housing and employment growth between 2016 to 2046, by settlement areas and rural area.

The primary objective of this report is to assess the amount, type and location of population and employment growth within South Frontenac to the year 2046. This analysis will serve as a technical background document to the Township's growth management strategy (G.M.S.) and Official Plan (O.P.) review.

It is important to note that Frontenac County recently undertook a review of its long-term population, housing and employment growth projections, which was completed in January 2020, hereafter referred to as the 2020 Frontenac County Growth Analysis Study.¹ This County-wide analysis provides a range of long-term growth scenarios to the year 2046 as well as an allocation of the preferred residential growth forecast by Area Municipality. The growth analysis carried out for South Frontenac as part of this study largely focuses on the allocation of residential and non-residential development throughout the Township by settlement area and remaining rural area.

¹ Population, Housing and Employment Projections Study. County of Frontenac. Final Report. January 20, 2020. Watson & Associates Economists Ltd.



Chapter 2

Approach



2. Approach

2.1 Long-term Population, Household and Employment Forecast Approach

As previously mentioned, the long-term Township-wide growth analysis builds upon the results of the 2020 Frontenac County Growth Analysis Study. The Township-wide growth forecast has been further disaggregated by settlement area and remaining rural area. Details with respect to the housing growth allocations have been provided by structure type, while the employment allocations are presented by major sector. The growth allocations have been largely derived from a review of Municipal Property Assessment Corporation (MPAC) data, recent building permit activity (2016 to 2019), Statistics Canada data, active residential development applications and residential and non-residential land supply data.

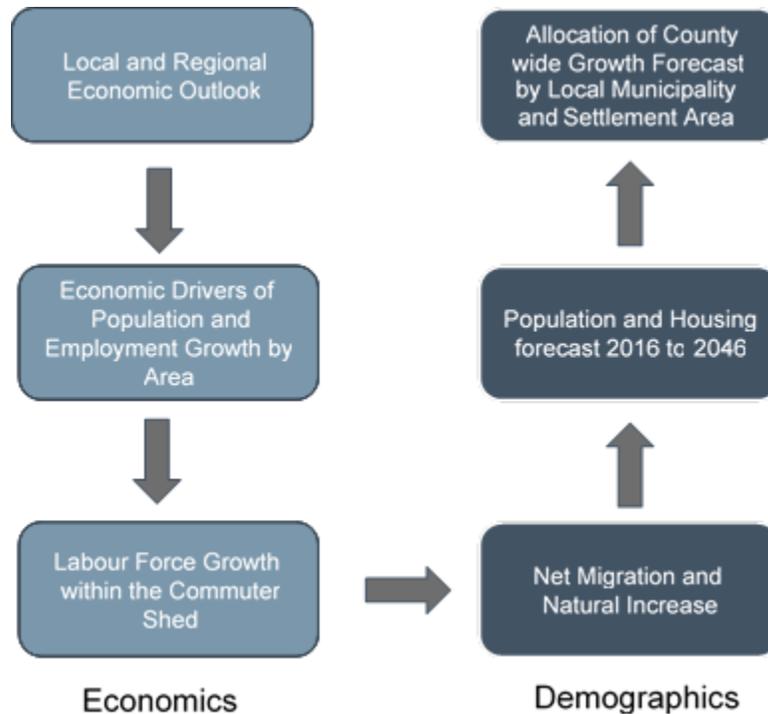
More specifically, forecast population, housing and employment growth by location have been assessed in five-year increments from 2016 to 2046 as follows:

- Forecast housing demand and corresponding population growth has been allocated in accordance with the rate of historical housing construction in the Township, adjusted to incorporate factors such as development constraints, active/future housing supply, opportunities for communal servicing and discussions with Township staff regarding anticipated market demand;
- Forecast population is then generated by developing assumptions regarding average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in persons per unit (P.P.U.) over time within existing households; and
- Forecast employment trends by major sector have been summarized by geographic area based on recent development trends, forecast demand and opportunities to accommodate future growth. Employment growth allocations have been based on a broad review of market potential, expansion opportunities within Employment Areas, the distribution of population growth, and discussions with Township staff.

Figure 2-1 provides a schematic overview of the employment, population and housing growth forecast approach discussed above.



Figure 2-1
Township of South Frontenac
Approach to Long-Term Employment, Population and Housing Growth Forecast



Forecast market demand for seasonal housing has also been analyzed in the 2020 Frontenac County Growth Study, based on a review of market demand for seasonal housing by local municipality in Frontenac County. Seasonal dwelling counts were derived from MPAC data between 2011 and 2018. Forecast seasonal housing demand has been largely based on an assessment of the key market areas which are anticipated to drive the demand for seasonal housing (i.e. City of Kingston, Greater Golden Horseshoe (G.G.H.), Ottawa Region and other major market areas).

A geographical analysis of seasonal dwelling growth has not been included in this report. The vast majority of all seasonal housing and population growth in Frontenac County is projected to occur within rural areas. This trend is consistent with historical seasonal dwelling development in South Frontenac. A more detailed analysis of County-wide seasonal housing and population growth by Area Municipality in Frontenac County can be found in the 2020 Frontenac County Growth Analysis Study.



Chapter 3

Township of South Frontenac Population, Housing and Employment Forecast, 2016 to 2046



3. Township of South Frontenac Population, Housing and Employment Forecast, 2016 to 2046

3.1 Regional and Local Growth Drivers

Prospective economic and population growth in Frontenac County and the Kingston C.M.A. is largely tied to the economic outlook of Ontario and beyond. Provincial economic growth positively influences the number of potential international, inter-provincial and intra-provincial migrants attracted to the broader economic region of Frontenac County and the Kingston C.M.A.¹

Population and employment growth within South Frontenac are closely tied to the City of Kingston. The proximity of South Frontenac to the Kingston area employment market represents a key driver of permanent population growth and the distribution of local housing demand. In 2016, 6,700 Frontenac County residents worked in the City of Kingston, of this total, 5,800 lived in the Township of South Frontenac.² The City of Kingston employed nearly 78% of all employed South Frontenac residents in 2016. Sustained employment growth in the City of Kingston will continue to drive new housing development and population growth in the Township, as individuals largely seek competitively priced, ground-oriented housing within a reasonable commuting distance to the City of Kingston. Quality of life factors largely attributed to “rural living” offered in South Frontenac are also expected to drive net migration from a broad range of demographic groups, including first time home buyers, families, empty nesters and seniors. Further details regarding regional and local growth drivers can be found in the 2020 Frontenac County Growth Analysis Study.

¹ Inter-provincial migration refers to migrants from other Canadian Provinces/Territories while intra-provincial migration refers to migrants from other areas of Ontario.

² Statistics Canada Table 98-400-X2016325.



3.2 Frontenac County Population, Housing and Employment Forecast, 2016 to 2046

In regard to County-Wide population, housing and employment growth, the key findings of the Frontenac County Growth Study are as follows:

- Under the Medium (Base Case) Employment Scenario, total employment is forecast to increase from approximately 5,400 in 2016 to 7,000 in 2046;¹
- The Frontenac County permanent population is forecast to increase over the next 30 years, from approximately 27,300 in 2016 to 33,200 in 2046. This represents an annual growth rate of approximately 0.7%;
- Relative to historical trends, housing growth is forecast to increasingly shift towards the County's settlement areas;^{2,3}
- Seasonal population accounts for approximately half of the County's total population base; and
- Including the County's seasonal population base, the total permanent + seasonal population for Frontenac is forecast to reach a total of 62,900 persons by 2046.

3.3 Township of South Frontenac Employment Forecast, 2016 to 2046

The following subsection provides an assessment of long-term employment potential by major sector for South Frontenac under the Preferred County-wide employment Scenario (medium forecast) to the year 2046⁴. The medium County-wide employment forecast was selected as the Preferred Scenario in accordance with historical employment and labour force growth trends as well as forecast labour force growth potential for the Kingston C.M.A. As summarized in Figure 3-1, the Township's employment base is expected to increase by approximately 1,100 jobs between 2016

¹ Including work and home and no fixed place of work employment.

² Excluding seasonal dwellings and seasonal-to-permanent unit conversions.

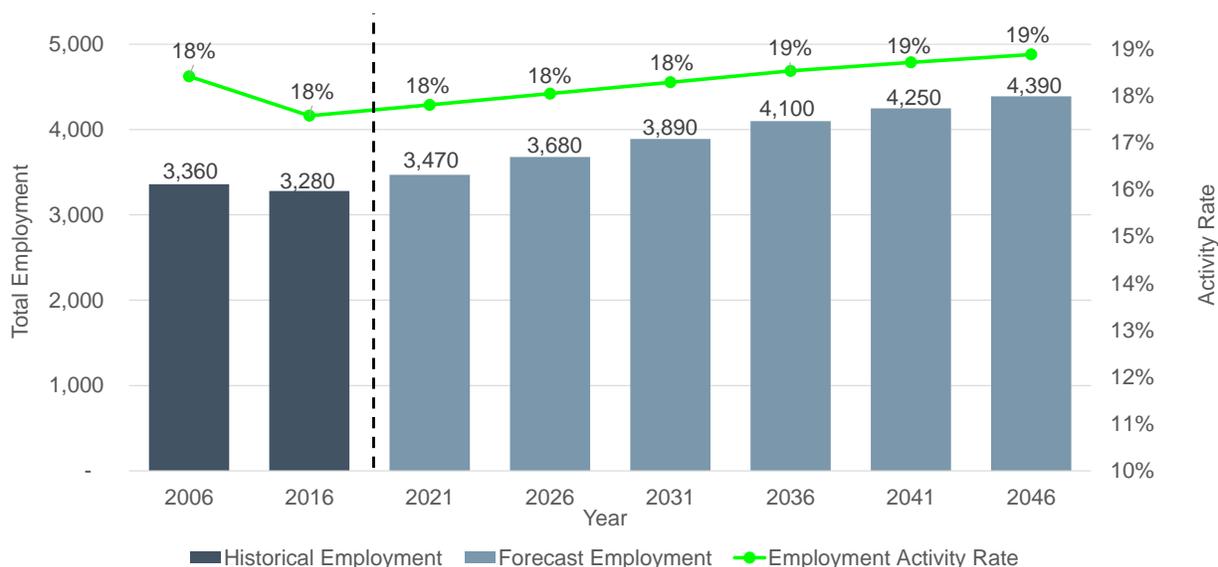
³ This shift is anticipated to be largely driven by the aging of the local population base, market demand for broader housing options within settlement areas, opportunities in primary settlement areas for communal servicing and continued upward pressure on local housing prices. Refer to section 4.2 of this report for further details.

⁴ Population, Housing and Employment Projections Study. County of Frontenac. Final Report. January 20, 2020. Watson & Associates Economists Ltd.



and 2046, increasing from 3,300 to 4,400. This represents an average annual growth rate of 1% over the 30-year forecast period. The employment activity rate (ratio of jobs to population) is expected to slightly increase over the forecast period, representing a slightly faster rate of long-term employment growth relative to permanent population growth.

Figure 3-1
Township of South Frontenac
Employment Forecast, 2016 to 2046



Source: 2001 to 2016 from Statistics Canada place of work data including work at home and no fixed place of work. Forecast by Watson & Associates Economists Ltd., 2019.
Note: Numbers have been rounded.

3.3.1 Township of South Frontenac Forecast Employment Growth by Major Sector, 2016 to 2046

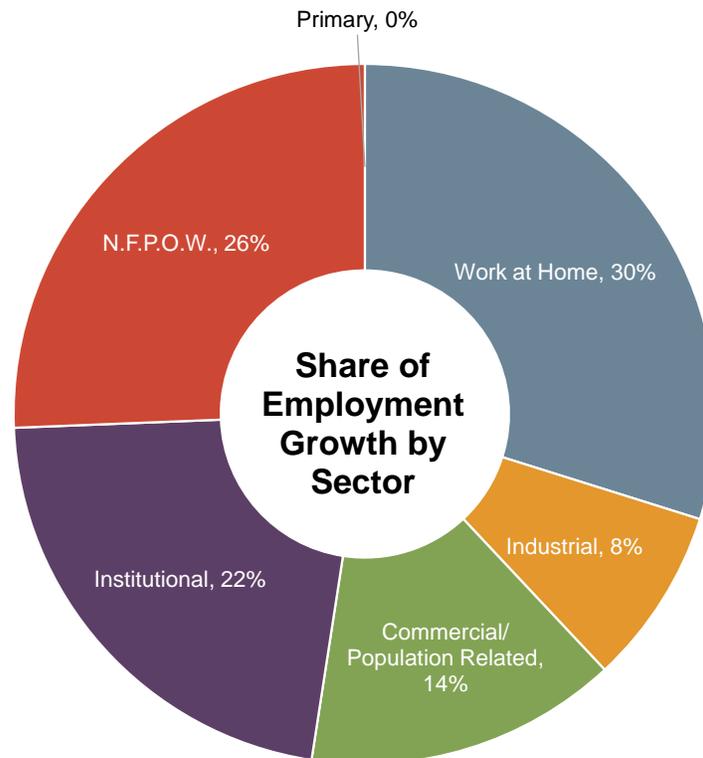
Employment growth within South Frontenac is expected across a range of sectors driven by the continued development of the regional and local economic base and steady local population growth. Figure 3-2 summarizes the 2016 to 2046 employment forecast by major employment sector for the Township. Employment growth related to work at home and no fixed place of work (N.F.P.O.W.), i.e. off-site employment categories, is forecast to account for the majority of job growth in South Frontenac.¹ Adjusted for work at home and off-site employment, on-site employment in institutional,

¹ Over half of the Township’s employment growth forecast to occur in sectors that do not generate a gross floor area (G.F.A.).



commercial and industrial sectors is expected to account for 44% of employment growth between 2016 to 2046.

Figure 3-2
Township of South Frontenac
Share of Employment Growth by Sector, 2016 to 2046



Source: Forecast is estimated by Watson & Associates Economists Ltd., 2019.

3.4 Township of South Frontenac Population and Housing Forecast, 2016 to 2046

3.4.1 Township of South Frontenac Permanent Population Forecast, 2016 to 2046

Figure 3-3 summarizes the population growth forecast for the Township from 2016 to 2046 under the Preferred County-wide Population Growth Scenario (i.e. medium forecast).¹ Similar to employment, the Preferred Population Scenario anticipates strong

¹ Population, Housing and Employment Projections Study. County of Frontenac. Final Report. January 20, 2020. Watson & Associates Economists Ltd.



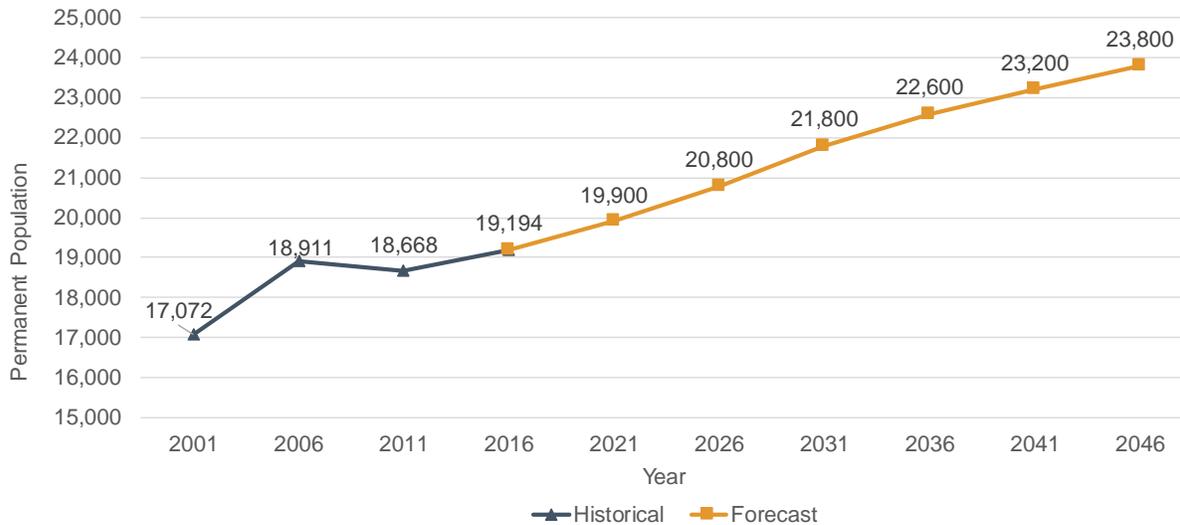
employment and population growth within the Kingston C.M.A., translating into steady labour and housing force growth within Frontenac County. Sustained employment growth in the City of Kingston will continue to support housing development in South Frontenac, as workers continue to seek competitively priced housing options within a reasonable commuting distance to the City. Quality of life attributes offered in South Frontenac are also expected to drive housing demand across a broad range of demographic groups, including first time home buyers, families, empty nesters and seniors. The Township of South Frontenac's rural character, proximity to the City of Kingston and access to a wide range of recreational opportunities represents a key draw to both new residents and businesses.

The following observations can be made with respect to long-term permanent population growth potential in the Township of South Frontenac:

- The Township-wide permanent population base is forecast to increase from approximately 19,100 in 2016 to 23,800 by 2046, representing a population growth rate of 0.7% over the 30-year forecast period;
- Population growth is expected to be driven by net in-migration, largely from other areas of the Province, resulting in steady new housing construction across the Township; and
- The rate of population growth in the latter half of the forecast period is anticipated to moderate slightly due to the aging of the existing population. As the population continues to age, population growth associated with natural increase (births less deaths) is expected to become increasingly negative, placing downward pressure on future population growth potential in South Frontenac.



Figure 3-3
Township of South Frontenac
Permanent Population Forecast, 2016 to 2046



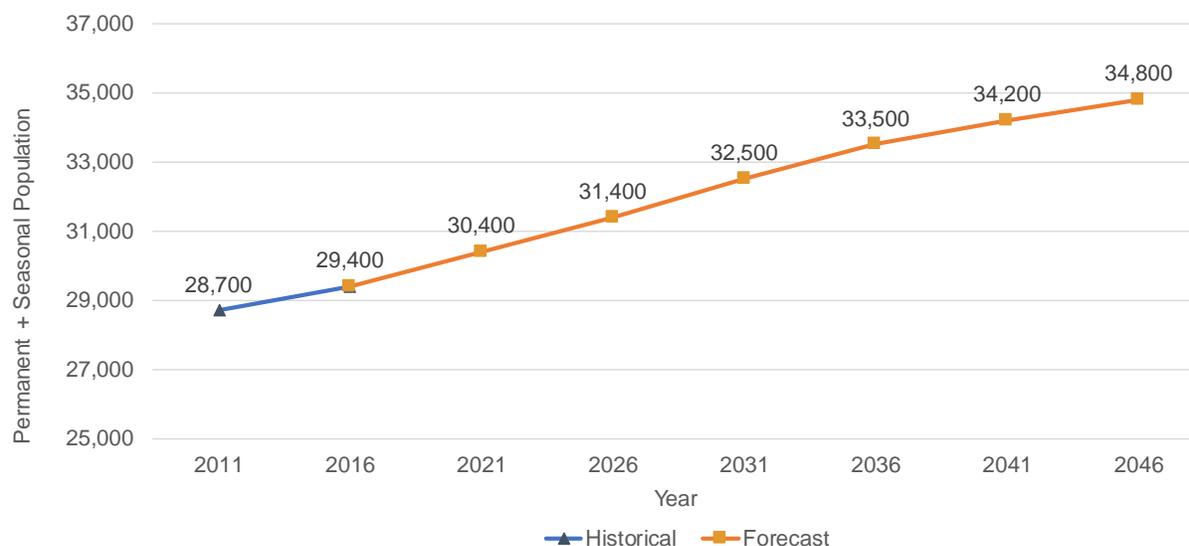
Source: 2011 to 2016 from Statistics Canada Census, derived by Watson & Associates Economists Ltd., 2019. 2016 to 2046 forecast by Watson & Associates Economists Ltd., 2019.
Note: Population figures are rounded and include the net Census undercount estimated at 2.4%.

Seasonal residents account for a significant component of the Township's total population base, accounting for approximately 35% of total base population as of 2016 (approximately 41% of the total 2016 housing base). It is important to recognize population growth potential related to seasonal residents, as these residents place demands on municipal services and infrastructure, particularly during peak summer months. Over the forecast period, the potential conversion of dwellings occupied by seasonal residents to permanent occupancy may also place further upward pressure on the Township's permanent population growth rate. This trend has been occurring in recent years and is anticipated to continue, largely given the Township's attractiveness as a retirement destination.

Figure 3-4 summarizes forecast permanent and seasonal population growth for the Township of South Frontenac from 2016 to 2046. During this period, Township-wide permanent and seasonal population is forecast to increase from approximately 29,400 in 2016 to 34,800 by 2046, representing a population growth rate of 0.6% over the 30-year period.



Figure 3-4
Township of South Frontenac
Permanent + Seasonal Population Forecast, 2016 to 2046



Source: 2011 to 2016 from Statistics Canada Census and MPAC, derived by Watson & Associates Economists Ltd., 2019. 2016 to 2046 forecast by Watson & Associates Economists Ltd., 2019.
Note: Population figures are rounded and include the net Census undercount estimated at 2.4%.

3.4.2 Township of South Frontenac Permanent Housing Forecast, 2016 to 2046

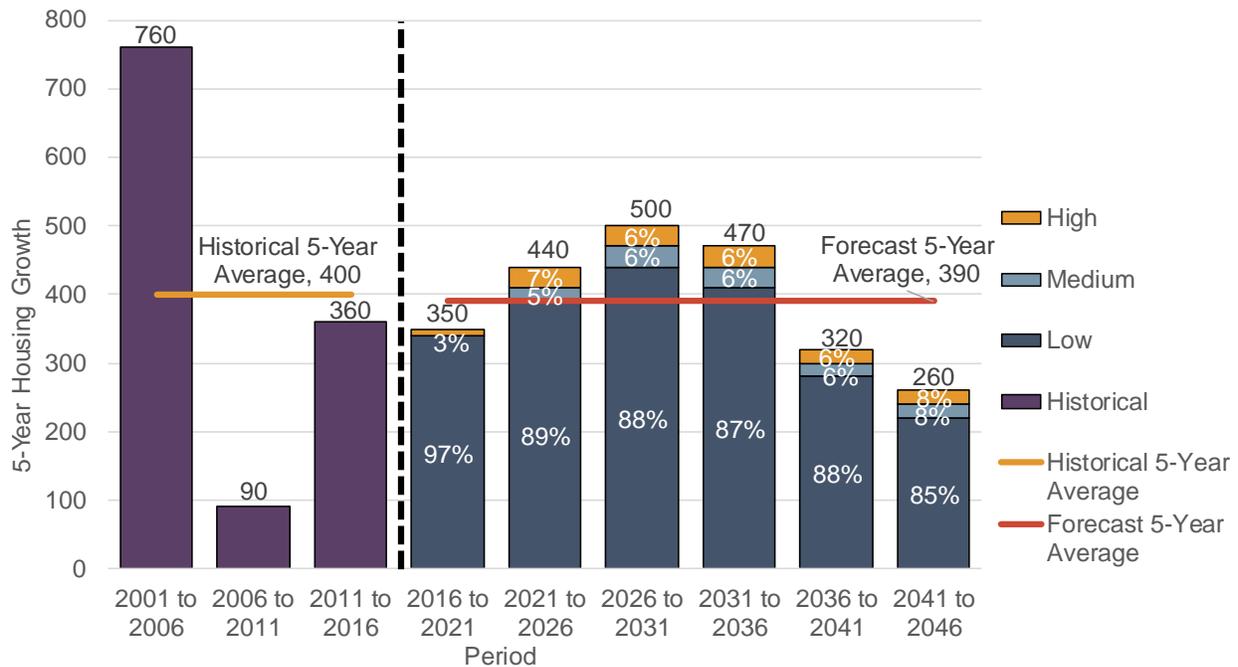
Figure 3-5 summarizes the Township's household forecast from 2016 to 2046 in five-year growth increments by structure type. Housing trends between 2001 and 2016 are also provided for historical context. Key observations include:

- Based on a review of recent MPAC data and residential building permits issued for new dwellings between 2016 to 2019, projected annual housing development during the 2016 to 2021 period is forecast to remain relatively consistent with most recent 5-year historical trends;
- Total permanent households are expected to increase from roughly 7,200 in 2016 to 9,700 in 2046, representing an increase of 2,500 total units;
- Forecast housing growth is expected to follow similar overall trends to the most recent 15-year historical period in terms of annual new housing construction levels; and
- Over the 2016 to 2046 forecast period, new housing is forecast to be comprised of 90% low-density (singles and semi-detached), 4% medium-density



(townhouses) and 6% high-density (apartments) units. In comparison to historical trends, a slight increase in the share of medium and high-density housing forms is anticipated, largely driven by the aging of the population, potential opportunities in primary settlement areas for communal serving and continued upward pressure on local housing prices.

Figure 3-5
Township of South Frontenac
Five-Year Incremental Housing Growth Forecast, 2016 to 2046



Source: Statistics Canada Census Profules, 2001 to 2016. Forecast by Watson & Associates Economists Ltd., 2020.

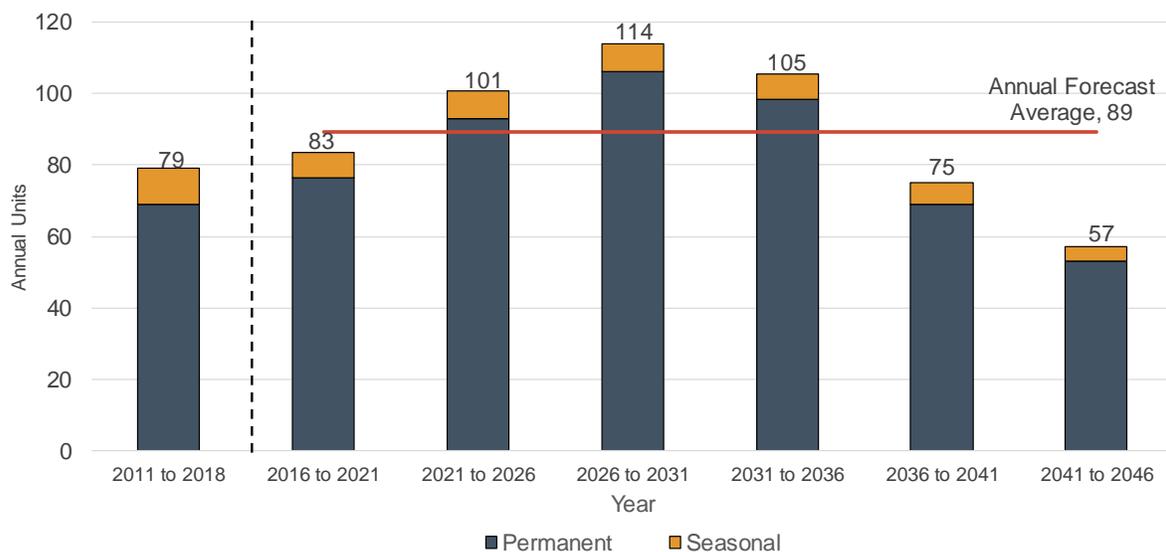
3.4.3 Township of South Frontenac Permanent + Seasonal Housing Forecast, 2016 to 2046

Figure 3-6 summarizes the Township’s permanent and seasonal housing forecast (including converted dwellings from seasonal to permanent occupancy) over the 2016 to 2046 planning horizon in comparison to historical trends from 2011 to 2018. Further details regarding seasonal population and housing growth in the Township of South Frontenac can be found in Appendix D of the 2020 Frontenac County Growth Analysis Study. The following trends can be observed:



- Net demand for seasonal housing development in South Frontenac is anticipated to average approximately 7 new units per year;
- The potential for seasonal housing conversions in South Frontenac is anticipated to average approximately 7 net conversions per year (roughly 50% of the County’s anticipated total housing conversions from seasonal to permanent occupancy over the forecast period). Seasonal-to-permanent conversions are captured within ‘permanent’ population and housing growth;
- Permanent + seasonal dwellings are forecast to increase from 10,000 total units in 2016 to 12,700 by 2046, representing an annual increase of just under 90 units;
- The Township’s permanent + seasonal population is expected to increase by 5,400 persons over the forecast period; and
- The rate of permanent and seasonal population growth in the latter half of the forecast period is anticipated to slow due to the aging of the Township’s ‘Baby Boomer’ population (persons born between 1946 and 1964).

Figure 3-6
Township of South Frontenac
Permanent + Seasonal Housing Growth, 2016 to 2046



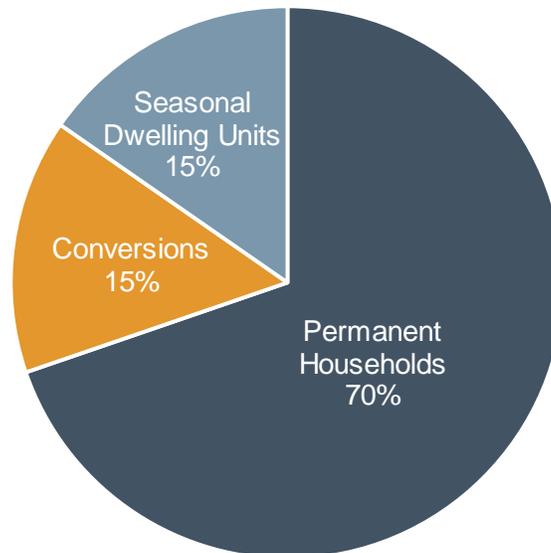
Source: Source: Historical data from Municipal Property Assessment Corporation (MPAC), derived by Watson & Associates Economists Ltd., 2019. Forecast (2021 to 2046) estimated by Watson & Associates Economists Ltd., 2019.

Figure 3-7 summarizes total housing growth over the 2016 to 2046 forecast period between permanent households and seasonal dwellings. Over this time period,



permanent households are forecast to account for approximately 85% of all housing growth over the forecast period, while seasonal dwellings are anticipated to account for the remaining 15%.¹

Figure 3-7
Township of South Frontenac
Township-wide Housing Growth by Type, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2020.

¹ Adjusted for the net conversion seasonal dwellings to households occupied on a permanent basis.



Chapter 4

Township of South Frontenac Population, Housing and Employment Growth Allocations, 2016 to 2046



4. Township of South Frontenac Population, Housing and Employment Growth Allocations, 2016 to 2046

As previously discussed, the Township-wide growth forecast has been further disaggregated by settlement area and remaining rural area. According to 2019 MPAC data, approximately 22% of permanent South Frontenac residents live within settlement areas. Between 2016 to 2046, new housing development is expected to steadily shift towards settlement areas. As previously noted, this transition will be largely driven by:

- The aging of the population base within the 65+ age group, which is anticipated to generate increased demand for new homes located within proximity to urban amenities (i.e. local shopping and health care services) as well as other community services and urban infrastructure;
- Increased demand from all demographic groups (including first-time home buyers, move-up home buyers/families, empty-nesters and seniors) for a broader range of housing options within primary settlement areas (including townhomes, low-rise apartments and seniors' housing);
- Continued upward pressure on local housing prices, particularly (ground-oriented homes on large lots); and
- Opportunities in primary settlement areas for communal servicing.

For the purpose of this study, settlement area definitions are as follows:

- **Primary Settlement Areas** provide a broad degree of services including commercial and community lands, as well as a broad range of housing options: Inverary, Sydenham and Verona;
- **Secondary Settlement Areas** are predominately residential with a smaller degree of commercial services: Battersea, Harrowsmith, Hartington and Sunbury;
- **Remaining Settlement Areas** are almost entirely residential and have not experienced as much growth and development in relation to primary and secondary settlement areas: Bellrock, Perth Road Village, Petworth, Railton, Spaffordton and Wilmer; and
- **Rural:** Growth outside of the defined settlement areas, including waterfront properties.



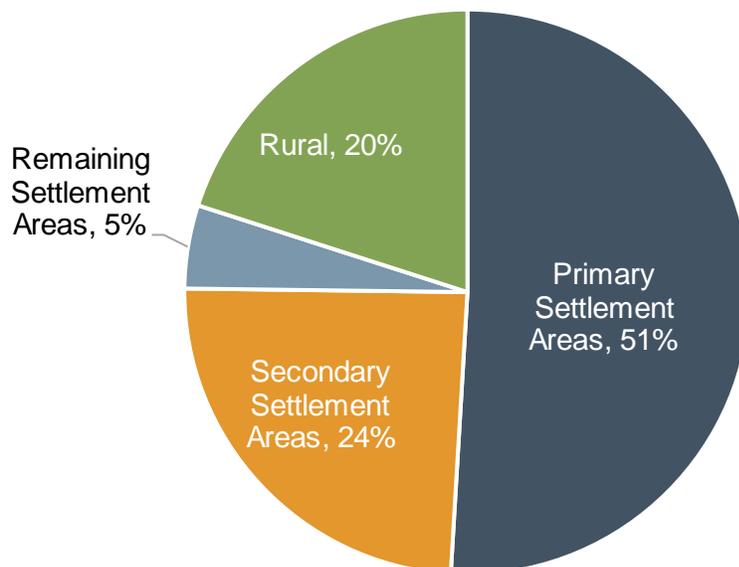
4.1 Township of South Frontenac Employment Growth Allocations, 2016 to 2046

Figure 4-1 summarizes employment growth forecast between 2016 to 2046 by geographic area. Key observations include:

- Primary settlement areas (Inverary, Sydenham and Verona) are forecast to accommodate approximately 570 new jobs (just over 50% of total employment growth) between 2016 to 2046;
- Population-related employment (commercial/institutional including work at home and off-site employment) is anticipated to generally follow population growth. Alongside forecast commercial employment growth in Inverary, the secondary settlement areas of Hartington and Harrowsmith have potential to facilitate highway commercial employment uses; and
- The majority of Industrial employment growth is forecast to occur in primary settlement areas with some opportunity for rural development. The settlement area of Sydenham has potential for light industrial growth on municipal water services. The Inverary employment area also represents a marketable location to attract and accommodate the majority of forecast industrial employment.



Figure 4-1
Township of South Frontenac
Forecast Employment Growth by Settlement Area and Rural, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2020.

4.2 Township of South Frontenac Permanent Population and Housing Growth Allocations, 2016 to 2046

Figure 4-2 summarizes forecast permanent population growth by location between 2016 to 2046, while Figure 4-3 presents the forecast allocation of permanent + seasonal population growth. In developing the growth allocations provided herein, broad consideration has been given to a number of factors which are anticipated to influence future housing development by geographic area within the Township, such as:

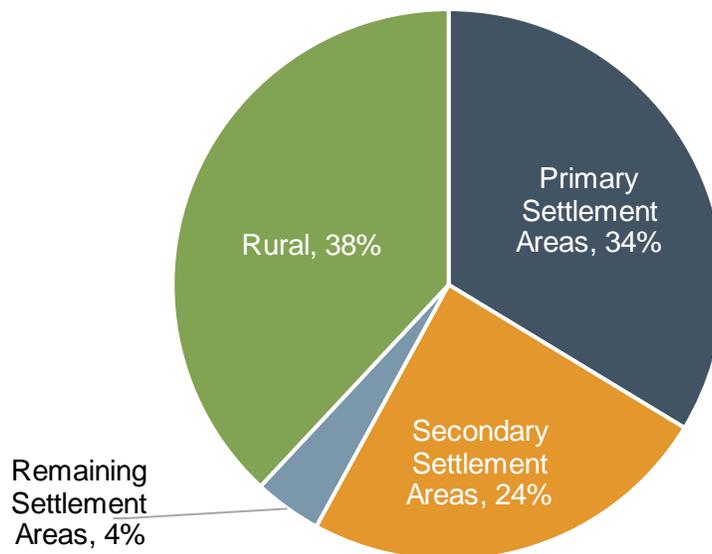
- The hierarchy of existing settlement areas, in relation to their current population and employment base as well as existing infrastructure and community services;
- Development constraints, active/future housing supply, and available land supply within settlement areas; and
- Opportunities for communal servicing.

Discussions were also held with Township staff regarding anticipated market demand and land use planning policy objectives. The following trends can be observed:



- The primary settlement areas of Inverary, Sydenham and Verona are expected to accommodate approximately 34% of permanent population growth between 2016 to 2046;
- Of the total permanent population growth forecast, approximately 38% is expected to occur in rural areas. This share increases when adjusting for seasonal + permanent population, since all seasonal population growth is anticipated to occur in the Township's rural areas; and
- Population growth associated with dwelling unit conversions from seasonal to permanent occupancy is also anticipated exclusively in rural areas.

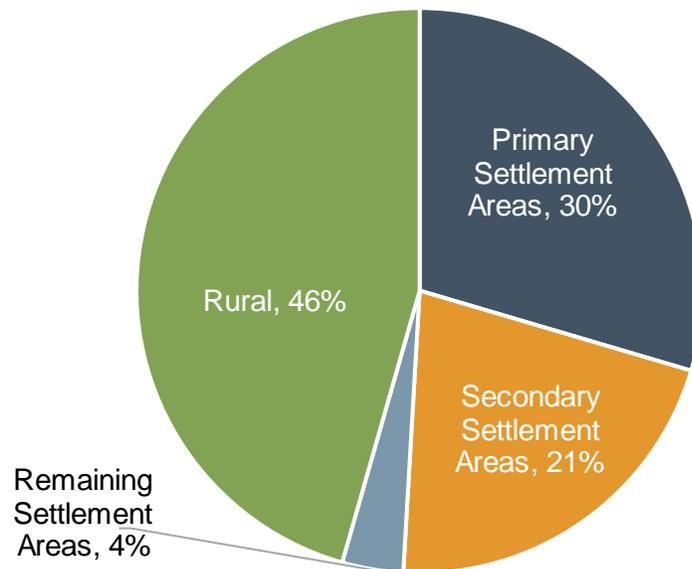
Figure 4-2
Township of South Frontenac
Permanent Population Growth by Settlement Area and Rural, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2020.



Figure 4-3
Township of South Frontenac
Permanent + Seasonal Population Growth by Settlement Area and Rural, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2020.

Figure 4-4 and Figure 4-5 summarize the anticipated location of total housing growth between 2016 to 2046 by development type.¹ The following trends can be observed:

- Rural areas are forecast to accommodate approximately 40% of all new permanent housing growth and 46% of total permanent + seasonal housing development.² This rural share of growth increases when also considering dwelling unit conversions from permanent to seasonal occupancy as well as demand for new seasonal dwellings;
- As of 2019, 92% of all seasonal dwellings in the Township were waterfront properties. This share is expected to continue into the forecast period, with the majority of seasonal dwelling growth expected to occur on waterfront lots;

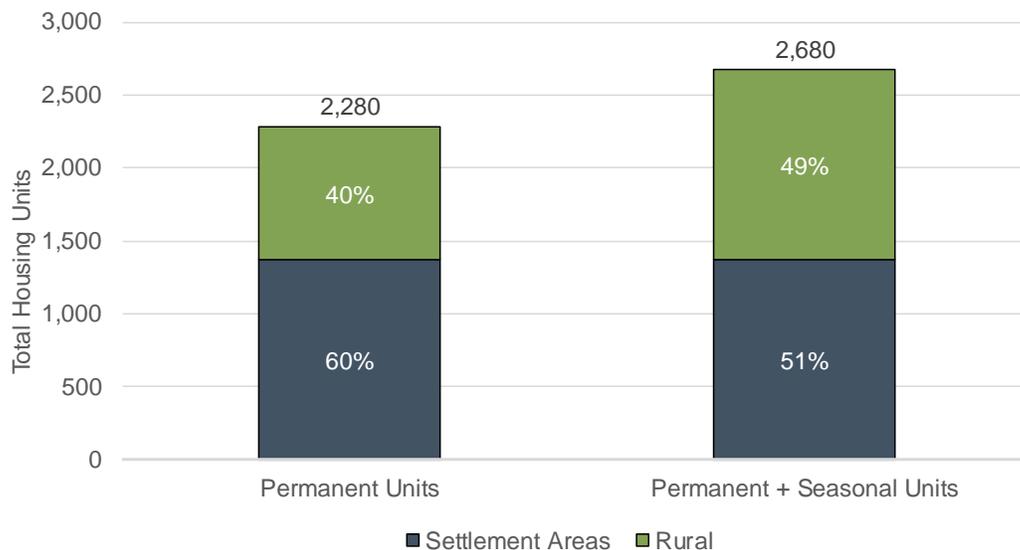
¹ Including conversions as well as the creation of new permanent and seasonal dwellings.

² It is noted that the share of rural housing development is forecast to outpace the share of rural population growth. Currently, a large share of the population live in rural areas. As the rural population base in South Frontenac continues to age, this is anticipated to place downward pressure on population change in the rural area.



- Comparatively, 27% of all permanent dwellings were located on the waterfront in 2019. As housing development shifts towards settlement areas, the share of permanent waterfront dwellings is expected to slowly decline over the forecast period;
- All medium- and high-density housing development is forecast in primary settlement areas due to the for potential communal servicing opportunities; and
- Primary settlement areas are expected to accommodate approximately 57% of total dwelling unit growth within settlement areas between 2016 to 2046, followed by 37% in Secondary Settlement Areas and 6% in Remaining Settlement Areas.

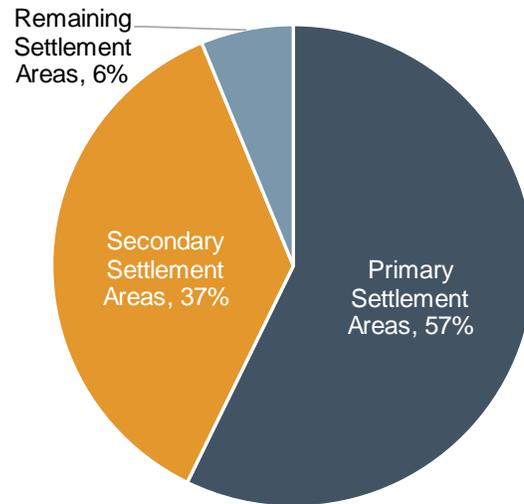
Figure 4-4
Township of South Frontenac
Total Housing Growth Allocations by Settlement Area and Rural, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2020.
Note: Seasonal-to-permanent unit conversions included in seasonal unit categorization.



Figure 4-5
Township of South Frontenac
Settlement Area Housing Growth by Location, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2020.



Chapter 5

Conclusion



5. Conclusion

The following key findings are provided with respect to forecast population, housing and employment trends for the Township of South Frontenac:

Regional and Local Economic Growth Drivers

- Economic growth in South Frontenac is closely tied to the City of Kingston. The proximity of South Frontenac to the Kingston area employment market represents a key driver of permanent population growth and the distribution of local housing demand;
- Regional and local employment growth opportunities will continue to drive housing and population development in the Township, as individuals largely seek competitively priced, ground-oriented housing within reasonable commuting distance to the City of Kingston;
- The Township of South Frontenac is characterized by a blend of expansive rural lands and historical settlement areas. The existing employment base is concentrated in retail, small to medium-scale industrial and commercial businesses and home occupations, government and education, accommodation and food services, agriculture and tourism. Growth opportunities within the Township's local employment base also represent a key driver of future housing demand and population growth; and
- Quality of life attributes offered in South Frontenac are also expected to drive net migration from a broad range of demographic groups, including first time home buyers, families, empty nesters and seniors. The Township of South Frontenac's rural character, proximity to the City of Kingston and access to a wide range of recreational opportunities represents a draw to both new residents and businesses.

Employment Growth Forecast

- The Township's employment base is expected to increase by approximately 1,100 jobs between 2016 and 2046, increasing from 3,300 to 4,400. This represents an annual growth rate of 1% over the 30-year forecast period;
- Employment growth in work at home and no fixed place of work (N.F.P.O.W.) categories is forecast to account for the majority of all job growth in South Frontenac;



- Population-related employment (commercial/institutional including work at home and N.F.P.O.W. employment) is anticipated to generally follow population growth. Alongside commercial employment growth in Inverary, the secondary settlement areas of Hartington and Harrowsmith have potential to facilitate highway commercial employment uses;
- The majority of industrial employment growth is forecast to occur in primary settlement areas with some opportunity for rural development. The settlement area of Sydenham has potential for light industrial growth on municipal water services; and
- The Inverary employment area also represents a marketable location to facilitate the bulk of forecast industrial employment.

Residential Growth Forecast

- The Township of South Frontenac permanent population base is forecast to increase over the next 30 years, from approximately 19,100 in 2016 to 23,800 in 2046.¹ This represents an annual growth rate of approximately 0.7%;
- Over the 2016 to 2046 forecast period, new housing growth is forecast to be comprised of 90% low-density (singles and semi-detached), 4% medium-density (townhouses) and 6% high-density (apartments);
- Compared to historical trends, housing growth is forecast to shift more towards settlement areas between 2016 to 2046. This shift is anticipated to be largely driven by the aging of the population, local desire for more housing options within settlement areas, opportunities in primary settlement areas for communal serving and continued upward pressure on local housing prices;
- Housing growth in settlement areas is anticipated to be concentrated in the primary areas of Inverary, Sydenham and Verona; and
- Rural areas are forecast to contain 40% of all new permanent unit growth. This rural share of growth increases when also considering dwelling unit conversions from permanent to seasonal occupancy as well as demand for new seasonal dwellings.

¹ Population figures include an upward adjustment of approximately 2.3% to account for the net Census undercount.
