Official Plan Review

Town of Arnprior

Growth Management Strategy – Final Draft

June 2022

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List of Acronyms and Abbreviations

C.M.A.	Census Metropolitan Area
C.N.R.	Canadian National Railway
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.M.S.	Growth Management Study
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto Hamilton Area
I.C.I.	Industrial Commercial Institutional
L.Q.	Location Quotient
M.C.R.	Municipal Comprehensive Review
MPAC	Municipal Property Assessment Corporation
M.U.C.E.	Mixed Use Commercial and Employment
M.U.R.C.	Mixed Use Residential/Commercial
N.A.I.C.S.	North American Industry Classification System
N.F.P.O.W.	No Fixed Place of Work
O.P.	Official Plan
P.M.I.	Purchasing Managers' Index
P.P.S.	Provincial Policy Statement
Sq.ft.	Square feet
Sq.m	Square metres
W.A.H.	Work at home
V.P.N.	Virtual private network

Executive Summary

Executive Summary

Watson & Associates Economists Ltd. (Watson) was retained by the Town of Arnprior in 2021 to develop a Growth Management Strategy (G.M.S.) as background to the Town's Official Plan (O.P.) Review. The primary objectives of this study are to:

- Provide a comprehensive assessment of the Town's long-term population, housing and employment growth potential within the context of broader region-wide development trends and regional economic growth drivers;
- Ensure that there is an adequate supply of residential, commercial and employment lands to accommodate long-term demand which satisfies the Town's near-term and longer-term employment and population growth objectives; and
- Provide strategic policy recommendations, working within the context of the provincial, County, and Town's planning policy framework, that accommodate development and change in a sustainable manner while protecting what is valuable to residents and businesses.

The results of this analysis are intended to guide policy development specifically related to planning and growth management, urban land needs, affordable housing, municipal finance and infrastructure planning. The key findings of this study are summarized below.

Drivers and Disruptors of Future Population and Employment Change in Town of Arnprior

- Future population and employment growth within Arnprior is strongly correlated with the growth outlook and competitiveness of the economy within Arnprior and the surrounding region – which in this case is largely represented by the Ottawa Economic Region as well as the Kingston-Pembroke Economic Region. Steady economic growth within the commuter-shed of the Economic Region following the economic recovery from the 2008 global economic downturn represents the primary driver of net migration to this area over the past decade.
- Between 2021 and 2046, the population and employment based within the City of Ottawa is expected to increase by 346,000 residents and 165,000 jobs.[1] Future

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[1] City of Ottawa Official Plan, November 24, 2021.

employment growth within the City of Ottawa is anticipated to place continued outward urban growth pressure to the surrounding economic region as existing and new residents within the City seek affordable ground-related housing options within a reasonable commuting distance. Outward growth pressure from the City of Ottawa is anticipated to drive housing demand in Arnprior across all age segments.

- For Town of Arnprior, coronavirus disease (COVID-19) has acted as a near-term driver of future housing growth led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade "city lifestyles" for "smaller town living."

- The longer-term population and employment growth potential for Town will be heavily dependent on sustained economic growth potential of the broader economic region. Over the near-term, economic headwinds exist associated persistently high inflation rates (both domestically and globally), supply shortages and geo-political tensions. As such, it is important, not to overstate the near-term impacts of COVID-19 on housing demand in Town of Arnprior over the long term.

- As of 2016, more than one-third of the population in Arnprior is older than 55 years of age. Over the forecast period, the Town's population base is expected to continue to steadily age. Most notably, the percentage of population in the 75+ age group (older seniors) is forecast to increase over the forecast period from 12% in 2016 to 22% in 2051. Looking forward, this growing older population segment is anticipated to be a key driver of higher-density forms of housing growth in Arnprior, as this group will require a range of housing forms such as low-rise apartments, secondary suites and seniors' residences.

- The Town of Arnprior is also anticipated to accommodate young adults and new families seeking competitively priced home ownership and rental opportunities across a range of low-, medium- and high-density housing forms. Accordingly, opportunities should be explored to provide a mix of future housing across a range of density types to accommodate all age groups and income levels (including affordable housing options).

Watson & Associates Economists Ltd.

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Town-Wide Population, Housing and Employment Growth Forecasts, 2021 to 2051

A long-term population, housing and employment forecast has been prepared for Town of Arnprior to the year 2051. The forecast aligns with recent demographic, economic and socio-economic trends, as well as the growth drivers identified for the Town.

- Under the Reference Employment Growth Scenario, the Town of Arnprior employment base is expected to increase by approximately 1,600 jobs between 2021 and 2051.
- Town of Arnprior's population is expected to reach 14,700 by 2051, increasing by approximately 4,860 from 2021, under the Reference Population Growth Scenario.
- By 2051 the Town's housing base is forecast to increase to 6,850 households from 4,310 in 2021.
- Over the 2016 to 2046 projection period, new housing is forecast to be comprised of 49% low-density (singles and semi-detached), 22% medium-density (townhouses) and 29% high-density (apartments) units.

Residential and Non-Residential Land Needs, 2022 to 2047

- The results of the study indicate that Town's aggregate supply of designated urban land is sufficient to accommodate housing demand over the 25-year planning horizon.
- The Town is also forecast to experience a modest Employment Area land surplus over the 25-year planning horizon.

Policy and Strategic Recommendations

The primary objective of the Town of Arnprior G.M.S. is to provide a long-term vision for the Town which ensures that it continues to develop in a competitive and sustainable manner that is well balanced between future population and employment growth. A fundamental objective of the G.M.S. is to understand how and where residential growth within the Town will occur over the long-term planning horizon. Residential growth policies of the Town of Arnprior O.P. will need to be consistent with the P.P.S., 2020 while being considerate of the specific Town's local context. It is also required that the Town plan for residential growth in a coordinated, sustainable and resilient manner that makes efficient use of land, resources and infrastructure, while protecting public health

and safety. Chapter 8 of the GMS provides a series of strategic recommendations regarding the on-going management of the Town's existing developed and remaining greenfield urban areas.
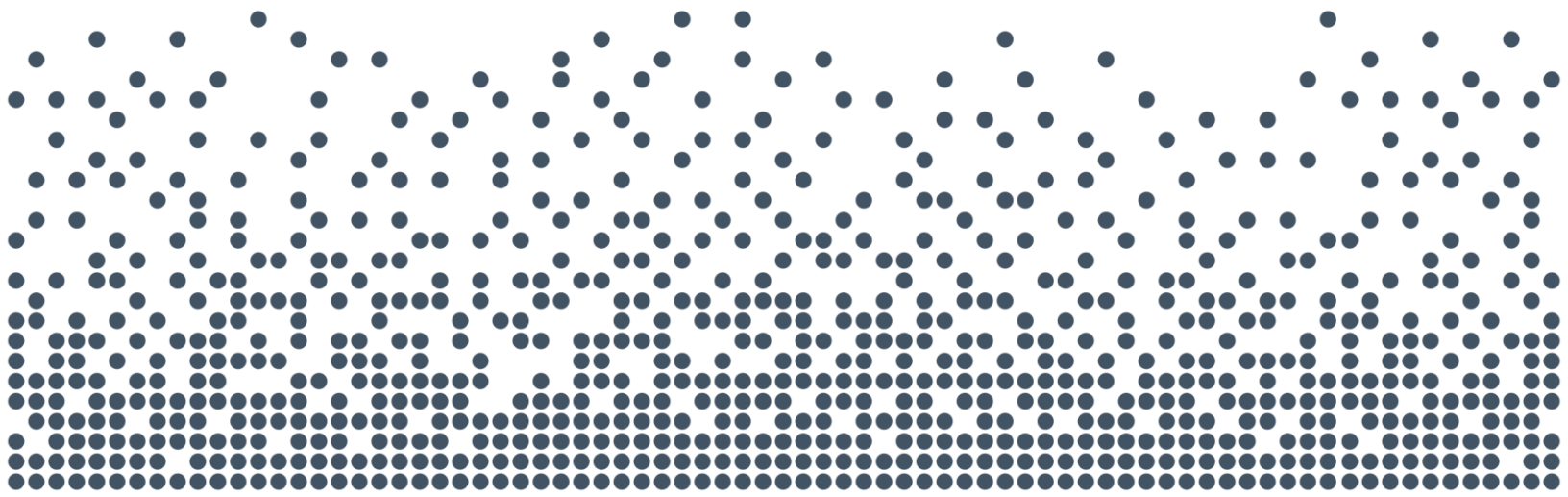
Report

Chapter 1
Introduction

1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson) was retained by the Town of Arnprior in 2021 to develop a Growth Management Strategy (G.M.S.) as background to the Town's Official Plan (O.P.) Review. The primary objectives of this study are to:

- Provide a comprehensive assessment of the Town's long-term population, housing and employment growth potential within the context of broader region-wide development trends and regional economic growth drivers;
- Ensure that there is an adequate supply of residential, commercial and employment lands to accommodate anticipated demand for urban land within the Town over the near- and longer-term; and
- Provide strategic policy recommendations, working within the context of the provincial, County, and Town land use planning policy framework.

More specifically, this G.M.S. provides a detailed assessment of the following:

- An overview of the provincial, County and local land-use planning policy framework regarding growth management within Ontario, Renfrew County and the Town of Arnprior to the year 2051;
- An assessment of macro-economic, as well as regional development trends and local demographic trends anticipated to impact the amount, type and location of long-term population and employment growth potential for the Town;
- Future residential land supply opportunities within the Town, in active development plans, identified intensification areas, as well as on vacant designated urban lands which currently have no active development applications;
- Future non-residential land supply opportunities (i.e. Employment Areas) within the Town in active site plans as well as on vacant designated urban lands;
- Forecast near- and long-term urban land needs within the Town in accordance with forecast population and employment growth as well as long-term trends in residential and non-residential density;
- Strategic policy recommendations that address the long-term management and monitoring of development/redevelopment across the Town of Arnprior.

This study forms an important background document to the Town's O.P. Review. The provincial *Planning Act* requires municipalities to update their O.P. every five years, or every ten years after the approval of a new O.P. The O.P. must be consistent with the current Provincial Policy Statement (P.P.S.), a provincial document that includes policy direction on matters of provincial interest related to land-use planning and development. The O.P. update is also an opportunity to ensure that O.P. policies continue to address evolving local priorities and changing community needs. The O.P. update incorporates the outcomes and priorities of recently completed/ongoing studies and plans (i.e. strategic plan, economic development initiatives and development charges by-law).

1.2 What is a Growth Management Strategy?

Growth management is a process of establishing a long-term cohesive vision for a region, County or City/Town, including its urban communities, rural lands, and protected countryside. Growth management direction and policies influence how and where growth and/or change should occur. Such planning and economic policies are required to ensure that Ontario municipalities such as Arnprior continue to mature and evolve in a financially, environmentally, and socio-economically sustainable manner.

Growth management policies also recognize that while it is not an objective to prevent or limit population and employment growth, municipalities should be planned in a manner that aims to potentially enhance livability and economic prosperity, while protecting what is important to residents and local businesses. As previously mentioned, the Province of Ontario has established a growth management framework for municipalities to follow. Core growth management concepts address the following growth elements:

- Availability of land and future urban land needs, land utilization (i.e. density and built form), urban design, appropriate types and locations of urban and rural land uses, phasing of development and redevelopment;
- Efficient utilization of municipal services and infrastructure as well as the movement of people and goods;
- Urban vitality, "place making," structural economic trends, the changing nature of work and evolving urban development patterns;
- Increasing housing choice and affordability; and
- The protection of the natural environment and cultural heritage.

It is important to recognize that the Town of Arnprior's G.M.S. and new O.P. are forward-looking documents designed to proactively plan for and accommodate change over the next several decades. Given uncertainties regarding future change and disruption, these documents are to be comprehensively updated at a minimum every ten years. Within these comprehensive updates, O.P. amendments may also be required.

Chapter 2
Policy Context

2. Policy Context

This Chapter provides an overview of the relevant provincial, County and local policies that apply to long-term growth management in the Town. These policies provide the framework for the analysis, recommendations, and strategic directions of the G.M.S.

2.1 Provincial Policy Context

2.1.1 Provincial Policy Statement

The Provincial Policy Statement, 2020 (P.P.S., 2020) provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions "shall be consistent with" the P.P.S. (*Planning Act*, R.S.O. 1990, c. P. 13 s. 3).

The P.P.S., 2020 came into effect on Mary 1, 2020.[2] Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land-use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019) and the on-going updates to the Growth Plan. Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and to reduce barriers and costs to the land-use planning system in order to provide greater predictability.

A significant change of the P.P.S., 2020 with regard to housing policy is the provision of a housing options approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (policy 1.4.3). Providing for housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

> "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 and uses such as, but not limited to life lease housing, co-

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[2] Provincial Policy Statement, 2020. Under the *Planning Act*. Ontario.

ownership housing, co-operative housing, community land trusts, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses."

Throughout the P.P.S., 2020 there is strong encouragement to consider the market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms that they have not historically had considerable success in implementing. As such, when discussing the outlook for the real estate market, it is important to discuss both existing conditions as well as the driving factors that are anticipated to encourage and disrupt housing market demand by structure type and built form. Furthermore, while market demand is important when considering long-range land-use planning, this demand must be considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and diversifying an economic base and supporting job creation.

Notable policies related to planning for Employment Areas in the updated P.P.S., 2020 include requiring municipalities to have enough urban land supply to meet projected needs for a planning horizon of 25 years, and include Employment Areas as areas that could be planned for beyond this horizon, provided they are not designated beyond the planning horizon.

The P.P.S., 2020 recognizes the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. It provides details on how municipalities should plan for employment. The P.P.S., 2020 policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The policy further outlines that, during an O.P. review or update, planning authorities assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2).

2.2 Renfrew County Official Plan

The current in-effect O.P. is the Renfrew County Official Plan (Consolidated Version March 26, 2020). Official Plan Amendment No. 31 was approved by the County of Renfrew on August 19, 2021. This document was reviewed as it relates to growth management, housing, and employment directions that affect the Town of Arnprior.

In the Renfrew County O.P. (policy 3.1), lands designated as Urban Communities represent those locations where the majority of growth and development will occur. There are four area municipalities in the County of Renfrew that have designated Urban Communities: Arnprior, Renfrew, Petawawa, and Deep River. According to policy 1.6 of the Renfrew County O.P., these four urban locations have their own detailed local O.P.s. In order to provide a wide range of housing options, policy 3.3.2 of the Renfrew County O.P. states:

> "Official Plans for those areas should contain as a minimum, a land use policy for the following uses:
>
> - Residential, including low, medium and high density residential uses, affordable housing, special needs housing, infilling and intensification. Residential intensification and redevelopment should be encouraged in appropriate areas with a target of 10%. Intensification includes, but is not limited to, the creation of infill lots, and the use of secondary dwellings to help achieve the target."

Policy section 2.2 of the Renfrew County O.P. provides directions to plan for housing across the County. Policy directions generally promote the orderly development of new housing that:

- Maintains a 10-year supply of lands designated for residential development and intensification;
- Provides for a range of forms and mix of housing for socially assisted housing where required; and
- Meets the requirement that 15% of all housing be affordable and a desirable 3% vacancy rate of rental accommodation.

In addition to growth-management-related policies, the Renfrew County O.P. also guides local O.P.s to provide direction on a number of issues including natural and built environment, community improvement, transportation and infrastructure, economic

development, housing, energy conservation, heritage resource conservation, municipal services, hazard lands, and policies for implementation of various provisions of the O.P.

Subsection 1.3 (8) and Appendix A of the Renfrew County O.P. provide the projected population and percentage share of growth by local municipality to 2036.

2.3   Town of Arnprior Official Plan (Effective December 2017)

Similar to the Renfrew County O.P., the Arnprior O.P. establishes a framework for the continued growth and development of the Town. The guiding principles of the Town's O.P. are detailed in section A2 and emphasize multiple facets of the Town including natural heritage, economic development and competitiveness, housing and intensification, cultural heritage, public open spaces, transportation and infrastructure, accessibility, and community wellbeing.

Section B of the Arnprior O.P. outlines Growth Management Policies. According to section B1, all lands in the Town are within a settlement area. Sections B2 to B4 provide an overview of the current population, housing and employment projections for the Town. The Town's population, as per the O.P., is forecast to grow to 11,773 by 2036 and employment is forecast to increase to 7,137 after 2036. In accordance with the Renfrew County O.P., the minimum intensification target set forth in the Arnprior O.P. is 10%. This G.M.S. provides an updated population, housing and employment forecast for the Town to the year 2051.

One of the guiding principles of the O.P. is to ensure that an adequate supply of land and housing choices are available for present and future residents of all ages, abilities, incomes and household sizes. Section B9 identifies specific policies for housing development in the Town. According to the O.P., the Town has to ensure there is a minimum supply for a 10-year planning horizon. The plan further encourages residential intensification, development of secondary and garden suites and the development of special needs housing. The Town's O.P. has a minimum target for the provision of affordable housing of 15%.

Section C5 details policies for a Mixed-Use Commercial/Employment (M.U.C.E.) Area. The purpose of this designation is to provide for the development of retail uses that primarily have large floor areas in high traffic areas that have been comprehensively planned, and light industrial uses that do not require large buildings or outdoor storage.

Some of the employment type uses permitted within the M.U.C.E. designation include business and professional offices, industrial and warehouse uses with no outdoor storage or processing components, vehicle sale and servicing establishments and other service uses.

The Employment Area designation applies to the traditional industrial areas in the Town and have been detailed in Section C6 of the plan. The objectives of these uses include providing for an appropriate mix and range of employment uses to meet long-term needs and to provide opportunities for a diversified economic base. Section B10 of the O.P. provides for the protection of Employment Areas and states that proposals to convert lands within the Employment Area designation to another land-use designation will be reviewed through a C.R. as defined by the plan.

Chapter 3
Overview of Macro-Economic and Demographic Trends

3. Overview of Macro-Economic and Demographic Trends

This chapter summarizes the macro-economic trends influencing regional labour force and employment trends within Ontario, the Greater Ottawa Region and Kingston Census Metropolitan Areas (C.M.A.). This broader analysis has been undertaken to provide additional insight with respect to the recent macro-economic and demographic trends that are anticipated to continue to influence the near-term growth outlook for the Town of Arnprior (refer to Chapter 4 for local population and employment growth trends).

3.1 Global Economic Trends and International Trade

3.1.1 Impacts of COVID-19 on Near-Term Economic Growth

Following relatively steady economic growth since the global economy rebounded from the 2008/2009 financial crisis, the world changed dramatically in 2020. The December 2019 outbreak of coronavirus disease (COVID-19) was officially declared a global pandemic by the World Health Organization (W.H.O.) on March 12, 2020 and has inflicted rising economic and human costs throughout the world. In response to the threat of further escalation associated with the spread of the virus, governments around the world have implemented quarantine and physical distancing practices in what has been referred to as the "Great Lockdown."

The downward impact of these containment measures on global economic output, commodity prices, and consumer spending has been significant. Economic sectors such as travel and tourism, accommodation and energy have been hit particularly hard, largely due to containment measures. On the other hand, many other employment sectors (particularly knowledge-based sectors) that have been more adaptable to the current remote work environment have been less negatively impacted, and in some cases have prospered. Furthermore, required modifications to social behavior (i.e., physical distancing) and increased work-at-home requirements resulting from government-induced containment measures and increased health risks have resulted in significant economic disruption, largely related to changes in consumer demand and consumption patterns. Lastly, escalating tensions and constraints related to international trade have also begun to raise questions regarding the potential

vulnerabilities of globalization and the structure of current global supply chains. This has been further exacerbated by the geopolitical unrest which has arisen due to the 2022 Russian invasion of Ukraine.

With respect to COVID-19, the level of sustained longer-term economic impact related to this "exogenous shock" on the global and Canadian economy is still uncertain. As policy responses and vaccine efforts have been rolled out to pave the road for economic recovery, the rapid spread and threat of new variants have also increased the uncertainty as to when the pandemic will be overcome. Notwithstanding these uncertainties, the global economy is on a path towards recovery; however, it is increasingly clear that the longer the COVID-19 pandemic persists, the greater the challenges towards a global economic recovery.

The global economy contracted by 3.1% in 2020, representing a much more significant economic contraction than what was experienced during height of the 2008/2009 financial crisis. The latest International Monetary Fund (I.M.F.) World Economic Outlook anticipates that the growth of the global economy will slow to 4.4% in 2022 after experiencing growth of 5.9% in 2021. The volume of world trade (goods and services) experienced a decline of 8.2% in 2020, rebounding by 9.3% in 2021. This volume of world trade is forecast to moderate from 2021 but still remain steady at 6.0% in 2022.[3] Economic output for advanced economies is anticipated to be back on its pre-pandemic growth path in 2022 and to exceed it by 0.9% by 2024.[4]

According to the I.M.F., for Canada's largest trading partner, the United States (U.S.), economic output contracted by 3.4% in 2020, rebounded by 5.6% in 2021, and is expected to contract by 4% in 2022. The recovery of the U.S. economy will, in part, depend on the U.S. administration's response to dealing with the virus domestically, in conjunction with their approach to on-going international trade, protectionist policies and labour force supply. With respect to the national economy, Canada is expected to follow a similar path as the U.S., with output declining overall by 4.7% in 2021, and projected to further decline by 4.1% in 2022 and 2.8% in 2023.

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[3] International Monetary Fund. World Economic Outlook Update, Rising Caseloads, A Disrupted Recovery, and Higher Inflation. January 2022.

[4] International Monetary Fund. World Economic Outlook, Recovery During a Pandemic, Health Concerns, Supply Disruptions, and Price Pressures. October 2021.

The long-term global and Canadian economic outlook is positive, but it is important to recognize that there are economic headwinds of which to be mindful. Global supply shortages of goods due to trade disruptions and labour shortages, pent-up demand from consumers, and increased commodity prices are resulting in multi-decade-high inflation rates.[5] Record levels of public-sector debt due to pandemic response measures, and increasing household debt loads resulting from soaring housing prices in many areas of Canada are also a concern. Interest rate hikes are expected to help keep inflation levels in check, with Canada's inflation rate floating around 5% since late 2021, a level not seen since 2003.[6] Subject to the influence of national and global monetary policy, high inflation levels and interest rate increases could result in potential setbacks in the recovery path towards a stable economy.

Due to the social and economic modifications previously stated, COVID-19 has accelerated changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. These trends are anticipated to have a direct influence on commercial and industrial real estate needs over both the near and longer terms. In light of these anticipated trends, it is important to consider the manner in which these impacts are likely to influence the nature of employment by type, as well as by place of work.

Notwithstanding the recent positive real estate trends identified for eastern Ontario as a whole as well as the Town of Arnprior, there are a number of factors which support a cautious outlook with respect to the broader demand for housing over the near- to medium-term (i.e., the next one to five years). Reduced immigration levels in 2020 and expected lower levels in 2021 are anticipated to slow population growth within the larger urban centres of eastern Ontario, potentially placing downward pressure on housing market demand (refer to section 3.1.1).[7] Tighter mortgage rules could also temper the hot real-estate market as home buyers would face stiffer mortgage stress tests. The Governor of the Bank of Canada has also warned that home buyers who have

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[5] International Monetary Fund. World Economic Outlook, Recovery During a Pandemic, Health Concerns, Supply Disruptions, and Price Pressures. October 2021.
[6] Financial Post, RBC Chief executive calls for "rapid action" on interest rates to tame inflation. January 12, 2022.
[7] "Very difficult" to meet Canada's immigration targets after pandemic drop: immigration lawyer. CTV News. January 14, 2021.

overextended on their mortgages are vulnerable to rising interest rates when they must be renewed, and not to expect the rapid price increase to continue indefinitely.[8]

As of March 2022, with COVID-19 case counts decreasing, many governments have loosened mask mandates and vaccine passport requirements. In Canada, all provincial governments have either dropped or have issued timelines for the loosening of vaccine passports and mask mandates. This indicates a shift in the management of COVID-19, where governments are taking an "endemic" approach that will focus on living with the virus rather than eliminating it.

3.2   Planning within the Context of an Evolving National and Provincial Economic Outlook

3.2.1   Ontario Outlook within the Canadian Context

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by gross domestic product (G.D.P.) output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector. This has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn. It is noted that these G.D.P. declines in the manufacturing sector had started to show signs of stabilization in the past several years, prior to the recent global recession of 2020.

Over the past decade, the Ontario economy experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding from 2013 to 2018, as illustrated in Figure 3-4. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar and the gradual strengthening of the U.S. economy.[9] Growth in 2019 eased to 1.6%, largely as a result of a tightening labour market and slowing global economic growth.[10]

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[8] CTV Business News, Mortgage stress tests set to tighten in wake of Bank of Canada warnings, May 20, 2021.
[9] Valued at approximately $0.80 U.S. as of January 13, 2022.
[10] BMO Provincial Outlook, Spring 2019.

While the recent performance of the Ontario economy has remained relatively strong over the past several years through to early 2020, the COVID-19 pandemic poses significant economic impacts to the national and provincial economies. As illustrated in Figure 3-1, the Ontario economy is estimated to have contracted by 5.1% in 2020 before rebounding by 4.2% in 2021. BMO Capital Markets has forecast that the Ontario economy will continue its momentum, growing by 4.1% in 2022 and 3.7% in 2023, while the overall Canadian economy is expected to grow by 4.0 in 2022 and 3.5% in 2023.

Increasing household debt loads caused by rising house prices in Ontario also continues to pose a risk to the provincial economy, which is important to recognize when considering forecast labour force and employment growth trends. The sharp rise in Ontario's housing prices over the past decade, particularly in the Greater Toronto and Hamilton Area (G.T.H.A.), has contributed to record consumer debt loads and severely eroded housing affordability.

Figure 1
Province of Ontario and Canada
Annual Real G.D.P. Growth, Historical (2006 to 2020) and Forecast (2021 to 2023)
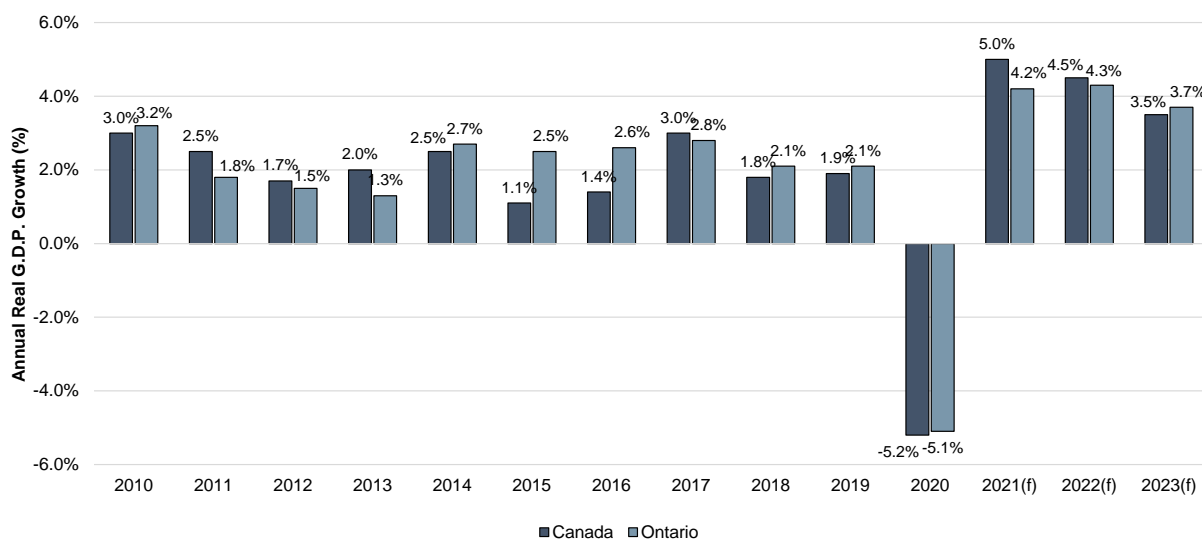
Note: 2021 to 2023 are forecast by BMO Capital Markets Economics.
Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, April 2021, by Watson & Associates Economists Ltd., 2022.

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3.2.2 Emerging Industry Sector and Labour Force Trends

3.2.2.1 Outlook for Provincial and Regional Manufacturing Sectors

The Purchasing Managers' Index (P.M.I.) is a prevailing economic indicator for economic trends in the manufacturing and services sectors which is based on the purchasing managers' market condition outlook and serves as a key measure of the direction of the manufacturing sector on a monthly basis. The P.M.I. index ranges between a number of 1 to 100. A P.M.I. value greater than 50 represents an expansion relative to the previous month, while a P.M.I. value less than 50 represents a contraction. Figure 2 summarizes the P.M.I. index for Canada between 2012 and 2020 (April). As illustrated in Figure 2, the P.M.I. index has largely exhibited moderate to strong expansion between 2012 and 2018, with the exception of 2015 and 2019, which experienced contractions. Also, 2013 and 2016 experienced periods of brief economic contraction. The P.M.I. index shows steep contractions at the beginning of March 2020 in manufacturing and services-sector activity due to the negative effects of COVID-19 on the global economy, international trade, and the general demand for goods and services. These conditions worsened into April 2020; however, they showed signs of a moderate rebound in May and June and strong growth from August to June 2021.

Figure 2
Purchasing Managers' Index for Canada, 2001 to June 2021
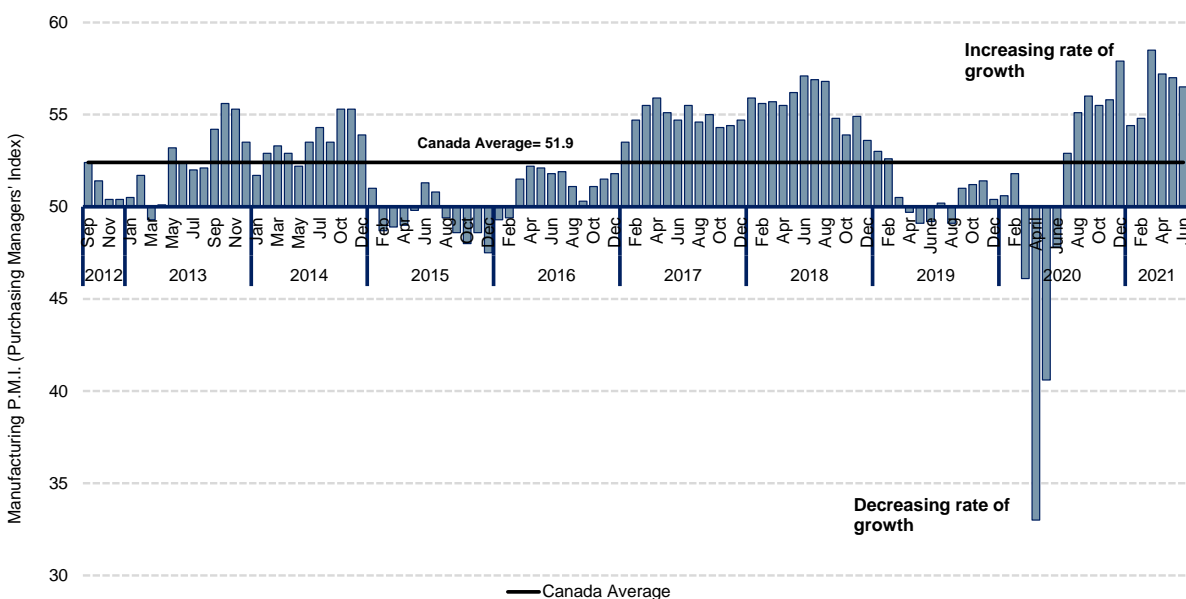
Note: Above 50.0 indicates growth from previous month, 50.0 indicates no change from previous month, and values below 50.0 indicate a decline from previous month.
Source: HIS Markit Canada, Canada PMI Index, June 2012 – June 2021 summarized by Watson & Associates Economists Ltd., 2022.

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate a high rate of labour-force growth across the Province over the coming decades, as globalization has led to increased outsourcing of manufacturing processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, the nature of industrial processes is rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive. As a result of increased efficiencies in the manufacturing sector, G.D.P. has increased relative to generally flat labour force trends as G.D.P. output per employee has risen.

As summarized in Figure 3, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009 with respect to labour force and G.D.P. Between 2009 and 2019, however, provincial labour force levels in the manufacturing sector

stabilized while G.D.P. output steadily increased. While showing modest growth since 2016, labour force levels in the manufacturing sector declined in early 2020 due to the impacts of COVID-19 but showed a steady rebound between June 2020 and December 2020.

Figure 3
Manufacturing Labour Force Employment in Ontario, 2000 to 2020
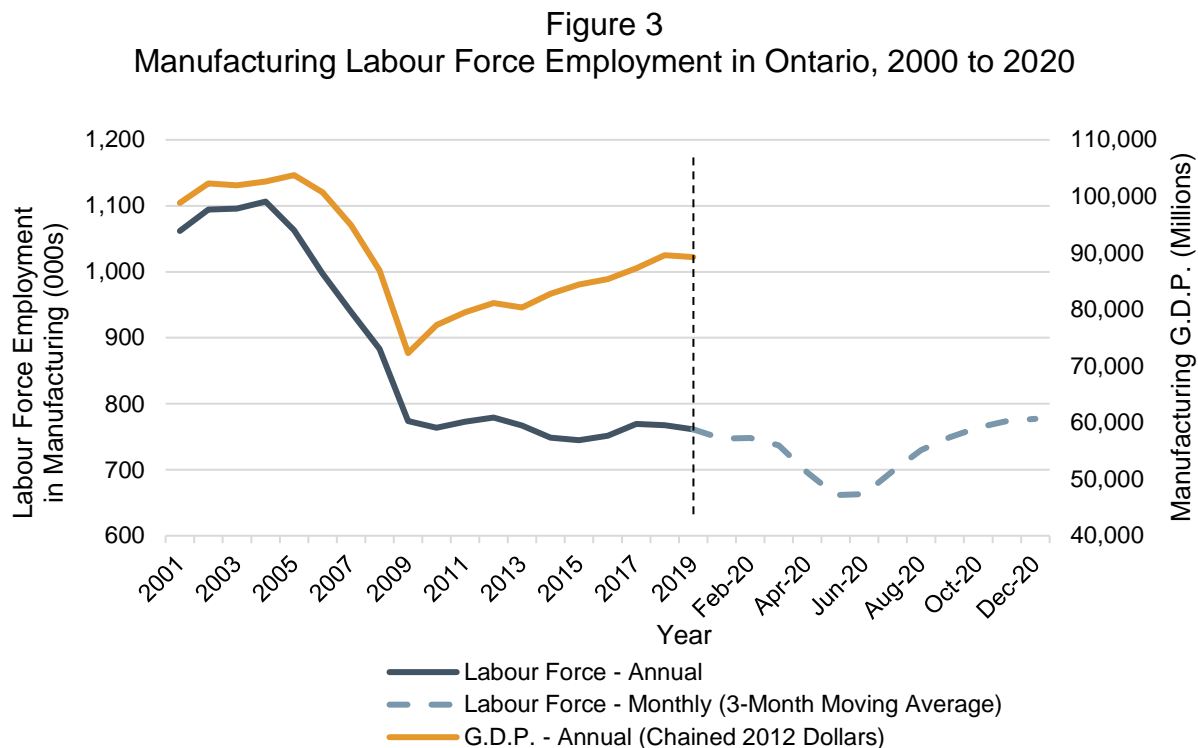
Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, and monthly data from Table 14-10-0091-01. Annual G.D.P. data from Statistics Canada Table 36-10-0402-01 by Watson & Associates Economists Ltd., 2022.

3.3   Regional and Local Employment Trends

3.3.1   Broader Regional Economic Outlook, 2001 to 2022

Figure 4 illustrates total labour force and unemployment rate trends for the Ottawa Economic Region. The Town of Arnprior forms a small part of the economic region geographically and is located adjacent to the City of Ottawa.[11] Labour force data represents the number of residents who live within the Ottawa Economic Region and

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[11] Based on the levels of geography for which the data on labour force and employment rate trends is maintained, Economic Region level data is the closest regional data available for Arnprior.

are within the labour force, regardless of where they work. This includes residents who live and work within the Ottawa Economic Region, including those who work from home, and those who commute outside the region for work. Between 2021 and 2046, the City of Ottawa is expected to increase by 346,000 residents and 165,000 jobs.[12] Future employment growth within the City of Ottawa is anticipated to place continued outward urban growth pressure to the surrounding economic region as prospective employees in the City seek affordable ground-related housing options within a reasonable commuting distance. Key observations include:

- The total labour force growth within the Ottawa Economic Region increased from 593,000 to 692,000 between 2001 and 2016;
- During the post-2016 period, the labour force market showed a high rate of growth, increasing from 692,000 in 2016 to 746,000 in 2019; but falling to 703,600 in 2020;
- The unemployment rate in the Ottawa Economic Region rose moderately to 6.3% in 2009, coinciding with the 2008 global economic recession, and subsequently fell to 4.7% in 2019, the lowest rate this area has experienced in over two decades, prior to peaking in June 2020 to 9.4% as a result of COVID-19. The unemployment rate in the Region has been lower than the provincial average during these peak periods;
- Since peaking in mid-2020, the unemployment rate in the broader Ottawa Economic Region has steadily declined as the regional economy continues to recover; and
- To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by municipalities within Ottawa Economic Region, including the Town of Arnprior, to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the region within a broad range of housing options.

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[12] City of Ottawa Official Plan, November 24, 2021.

Figure 4
Ottawa Economic Region
Total Labour Force and Unemployment Rate Trends, 2001 to 2022
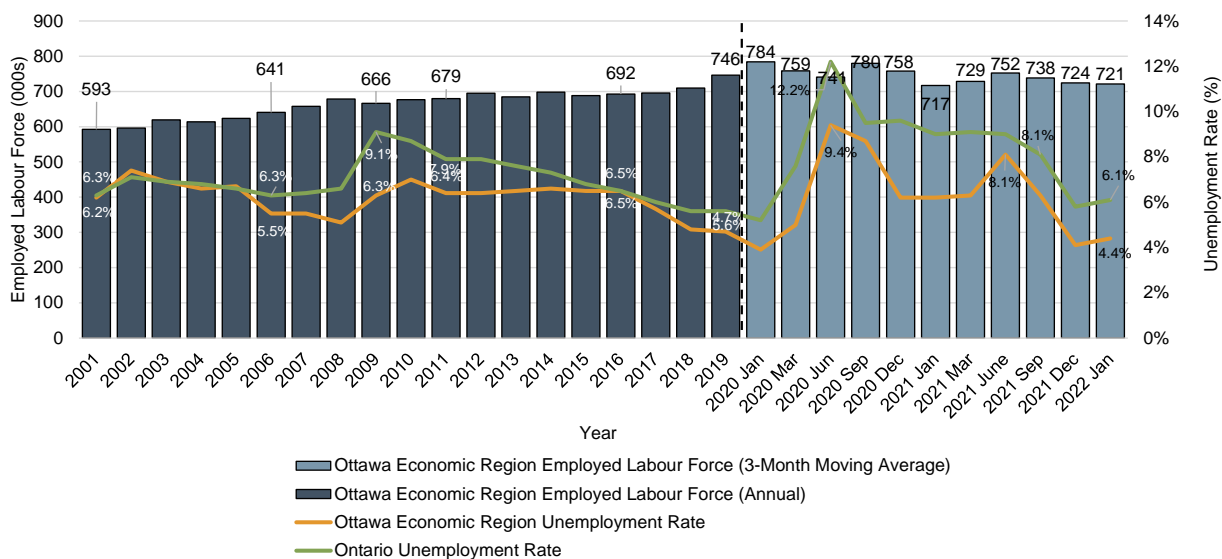
Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
Source: Ottawa Economic Region employed labour force and unemployment rate from Statistics Canada Table 14-10-0090-01 and 2020 monthly data from Table 14-10-0293-01. Annual Province
of Ontario unemployment rate from Statistics Canada Table 14-10-0090-01 and 2020 monthly data from Table 14-10-0295-02. 2021 monthly data from Table 14-10-0387-02. By Watson &
Associates Economists Ltd.

Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
Source: Ottawa Economic Region employed labour force from Statistics Canada Table 14-10-0096-01.
Province of Ontario unemployment rate from Statistics Canada Table 14-10-0090-01, by Watson &
Associates Economists Ltd., 2022.

3.4   Regional and Local Economic Growth Drivers and Disruptors

A broad range of considerations related to demographics, economics and socio-
economics are anticipated to impact future population and employment growth trends
throughout Arnprior over the 2021 to 2051 planning horizon. These factors will not only
affect the rate and magnitude of growth but will also influence the form, density and
location of residential and non-residential development. These broad drivers and
disruptive factors are briefly discussed below.

3.4.1   What Drives Population and Employment Growth?

As a starting point, it is important to recognize that future population and employment
growth within Arnprior is strongly correlated with the growth outlook and

competitiveness of the economy within Arnprior and the surrounding region – which in this case is largely represented by the Ottawa Economic Region as well as the Kingston-Pembroke Economic Region. Steady economic growth within the commuter-shed of the Economic Region following the economic recovery from the 2008 global economic downturn represents the primary driver of net migration to this area over the past decade. Added to this, an acceleration of work-at-home opportunities since the COVID-19 pandemic combined with competitive regional housing prices, particularly for ground-oriented housing forms, has continued to drive net migration to this area in recent years.

The employment base within Arnprior and the surrounding commuter-shed can be grouped into two broad categories – export-based sectors and community-based sectors; the latter primarily refers to local population serving employment. Export-based sectors comprise industries (i.e. economic clusters) producing goods that reach markets outside the community (agriculture and primary resources, manufacturing, research and development as well as other knowledge-based industries). Local industries also provide services to temporary and/or other residents of the Town not captured by Census data as part of the permanent population base such as hotels, restaurants, tourism-related sectors, colleges and universities, as well as businesses related to financial and professional, scientific and technical services.

Economic growth in the regional export-based economy generates wealth and economic opportunities that, in turn, stimulate community-based or population-related employment sectors, including retail trade, accommodation and food services, and other service sectors. Economic development subsequently drives the need for labour force growth which is largely generated from positive net migration. Ultimately, population growth in Arnprior within the 0 to 64 age group, similar to the country as whole, will continue to be largely driven by net migration associated with the working-age population and their dependents (i.e. children, spouses not in the labour force, others). On the other hand, population growth of the region's 65+ population will continue to be largely driven by the aging of the Town's existing population and, to a lesser extent, the attractiveness and affordability of the Town to existing and new seniors.

3.4.2 Outward Growth Pressure

As previously mentioned, the Town of Arnprior is located within Renfrew County, adjacent to the City of Ottawa. The location of Arnprior within the context of its commuter shed and surrounding region is shown on the map below.

Figure 5
Arnprior within the Context of the Surrounding Commuter Shed
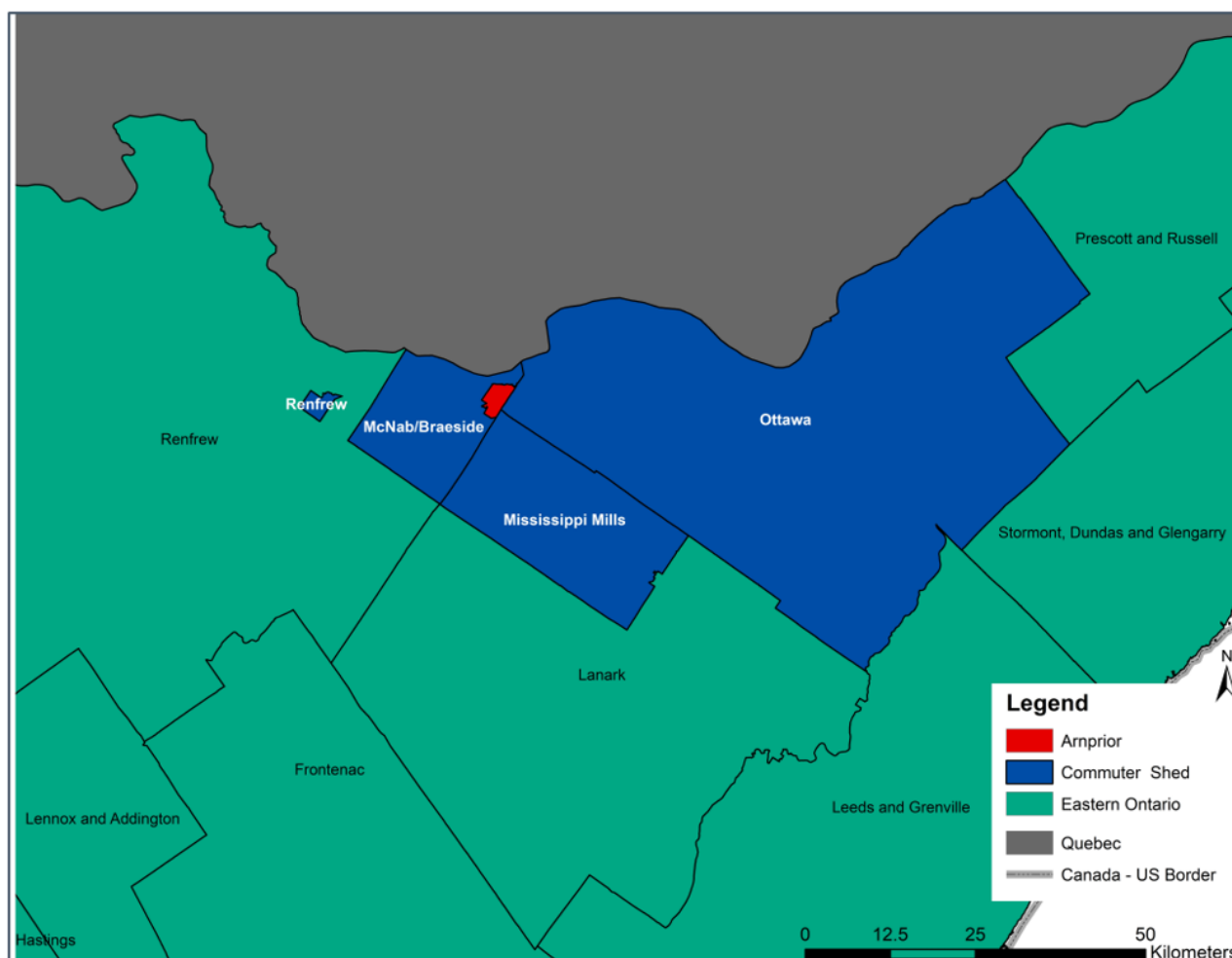
As displayed in Figure 6, 90% of Arnprior's residents work either within Arnprior or in Ottawa, while the rest commute to other surrounding municipalities for work. These include the Municipality of Mississippi Mills, the Town of Renfrew and the Township of McNab/Braeside. As the employment base within this surrounding commuter shed grows, Arnprior will continue to be a desirable location for these workers to live, leading

to steady population growth in the Town. For additional information about how commuting patterns have evolved since 2001, please refer to Appendix A.

Figure 6
Town of Arnprior Commuter Shed, 2016
Where Employed Town Residents Commute to Work
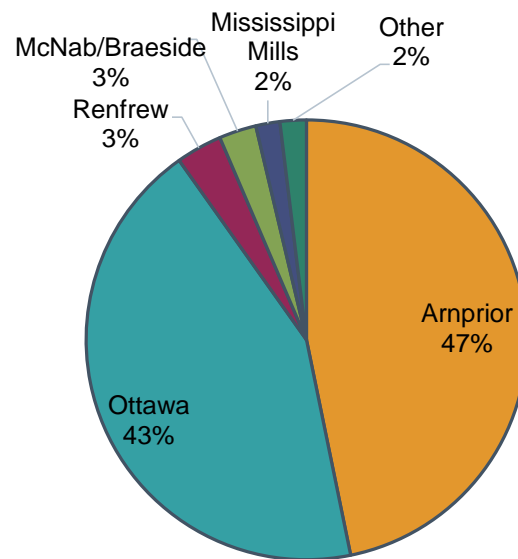
Source: Statistics Canada Census 2016 Data compiled by Watson & Associates Economists Ltd., 2021.

3.4.3 Attractiveness to the 55+ Age Group

Population growth of the 55+ age group across Ontario will continue to be a key driver of housing growth in Arnprior over the next 30 years. For Eastern Ontario as a whole, the percentage of the 55+ age group to the total population is projected to increase from 32% in 2016 to 36% in 2046.[13] The source of net migration to Arnprior in the 55+ age category will largely be from the City of Ottawa and surrounding Economic Region.

Future housing demand across Arnprior generated by the 55+ age group is anticipated to remain strong over the next decade, driven by the aging of the Baby Boom population. This will generate an increasing need to accommodate a growing number of seniors in housing forms that offer a variety of services ranging from independent living to assisted living and full-time care. On the other hand, a growing wave of new

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[13] Ministry of Finance, Spring 2021 Update, Table 6: Ontario Population Projections, 2016-2046, reference scenario.

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Arnprior residents will be seeking housing opportunities that are geared towards active lifestyles and recreation.

It is important to recognize that the population base of the Town is older on average and aging at a slightly faster rate than the Province as a whole. More specifically, the percentage of Arnprior's population in the 55+ age group is forecast to increase over the forecast period from 33% in 2016 to 42% in 2051 (refer to Chapter 5 for further details).

The aging of the population and declining population growth associated with natural increase (i.e. births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within Arnprior and, subsequently, the regional labour force participation rate. Similar to the Province as a whole, Arnprior will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions. It is important to recognize these demographic trends, as they are anticipated to constrain the rate of population and economic growth expected across the Town over the next several decades.

Given the diversity of the 55-74 and 75+ age groups, forecast housing demand across the Town between these demographic groups is anticipated to vary considerably. Housing demand within the 55-74 age group is anticipated to be relatively strong for ground-oriented housing forms (i.e. single detached, semi-detached and townhouses) provided in locations that offer proximity to urban amenities, municipal services, and community infrastructure. With respect to the 75+ age group, the physical and socio-economic characteristics of this age group (on average) are considerably different from those of younger seniors, empty nesters, and working adults with respect to income, mobility, and health. Typically, these characteristics represent a key driver behind the increased propensity of the 75+ population age group for medium- and high-density housing forms (including seniors' housing) that are in proximity to health care services as well as other community facilities that typically attract this age group.

3.4.4 Attracting Millennials and Future Generations

Future housing needs in Arnprior will be increasingly impacted by the Millennial generation. While there is no standard age group associated with the Millennial generation, persons born between 1980 and 1992 best fit the definition of this age group. Millennials represent a large age cohort in Canada, rivaling the Baby Boomer

generation in terms of size, and impacts on the real estate market and labour force base. As of 2016, Millennials accounted for approximately 14% of Arnprior's population, lower than the Ontario provincial average of 17%.[14]

Home ownership is considered important for most Millennials. A recent Royal Lepage study found that nearly half the Canadians aged 25-35 owned their home, and that 68% who currently are not homeowners planned to purchase a home in the next five years, with 72% being confident in their financial outlook. Nearly two-thirds of this age group who are employed or seeking employment feel the ability to work remotely for an employer is important, and approximately half said this has increased their likeliness to move further from their place of work. In total, nearly two in five are considering a move to a less-dense area due to the COVID-19 pandemic, while approximately half said COVID-19 did not impact their desire to move into less-dense areas. Given an option, 45% indicated they would prefer living in a city, while 47% said they would choose small town or country living. The most attractive features of living in a city were walkability (21%) and access to events, attractions and other entertainment options (21%), followed by diversity of people and cultures (18%), and more employment opportunities (17%). The top reasons for wanting to move to a less-dense area included access to more outdoor space (62%) and lower home prices (61%), followed by the affordability of larger properties (51%).

Much of this demand for future home ownership appears to be the desire for additional floor space and a yard, in many cases to accommodate a growing family. Anticipated housing demand by the Millennial population is anticipated to drive future housing needs across the Town, which provide options for first-time homebuyers as well as "move-up" buyers with growing families. With this in mind, housing demand is anticipated to be particularly strong for ground-oriented development – such as single and semi-detached dwellings, townhouses and back-to-back townhouses as well as higher-density development such as stacked townhouses and low-rise apartments.

Generation Z, the cohort that directly follows the Millennial Generation, is now entering the real estate and labour market. Demographers and researchers typically use the mid-1990s to mid-2000s as starting birth years to describe the Generation Z cohort. For the purposes of this study, we have assumed that those born between 1993 and 2005 (16-28 years of age as of 2021) comprise Generation Z. As of 2016, this

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[14] Statistics Canada, Census 2016, population by age.

population represented 12% of Arnprior's population base; however, at that time, this population base was primarily a youth population base (11 to 23 years of age) and not a major component of the housing market. By 2051, Generation Z is forecast to comprise 11% of the total population of Arnprior. Over the next several decades, Generation Z is also anticipated to place increased demand on low-, medium- and high-density ownership and rental housing.

It is also important to recognize the impact of Millennials and Generation Z on the nature of future employment growth, which will be increasingly driven by the knowledge-based economy. Compared to older age groups, Millennials and Generation Z have a higher average level of education attainment in Canada compared to older age groups. Millennials are considered the most educated generation; nearly 70% of Millennials have a post-secondary certificate, diploma and degree compared to the previous generation, Generation X, at approximately 55%. This bodes well in accommodating labour within the knowledge-based economy; however, it has posed a challenge in accommodating employment in other sectors of the economy, including unskilled employment, as a greater share of the Baby Boomer generation enters retirement. Generation Z will continue to serve as a catalyst for both growth and change related to future office, retail, institutional and industrial developments across Arnprior. The extent to which Arnprior can capitalize on potential demand from these demographic groups is subject to a number of economic and socio-economic variables (e.g. relative housing costs/affordability, local and regional employment opportunities, broadband infrastructure, lifestyle preferences, local amenities, community services and perceived quality of life).

3.4.5 Regional Economic Opportunities

Future population and housing growth potential within Arnprior is strongly influenced by the competitiveness of the export-based economy within the Town and Renfrew County, as well as within the surrounding regional economic area (i.e. Ottawa C.M.A., Kingston C.M.A. and Eastern Ontario). Between 2001 and 2016, the Ottawa and Kingston C.M.A.s combined for 32,100 new jobs, representing an annual growth rate of 1%. The continued economic success of these regional economy will not only attract prospective residents to Arnprior but also create economic synergies for future businesses to leverage. As previously referenced, Figure 5 provides a map of Eastern Ontario in the context of the Town of Arnprior. In assessing the Town's long-term population growth potential, it is important to explore the connection between

provincial/regional economic growth trends, regional labour force demand and forecast net migration potential across the region.

As previously identified, regional employment growth opportunities represent the primary driver of labour force growth, net migration and ultimately long-term population growth within Arnprior. Between 2001 and 2016 the Town's labour force base grew by 1,480 persons or by 3% annually. During the same historical time period, the County's labour force participation rate declined from 68% to 64%, largely due to the aging of the labour force. Looking forward, the County's labour force participation rate is anticipated to further decline as the Baby Boomer generation continues to age. It is important to recognize that the County's aging population and labour force will place downward pressure on long-term labour force growth potential within the Town of Arnprior, which further emphasizes the need to plan for steady migration, particularly geared to the working-age population.

The Town's existing employment base is concentrated in a diverse range of goods-producing and services-producing sectors such as small-, medium- and large-scale manufacturing, construction, wholesale trade, government and education, business services, information technology, research and innovation, accommodation and food services, agriculture, and tourism.

Notwithstanding the past and potential success of the regional employment market, international competition for business development and investment is becoming increasingly competitive in today's "new economy." The Town of Arnprior is located within proximity to a number of small, medium to large urban/suburban municipalities with which it competes directly for business attraction and investment. All these municipalities generally offer regional attributes that largely appeal to prospective international and local firms as well as new residents. As such, the Town of Arnprior will need to continue to explore approaches to leverage opportunities which capitalize on the human capital that currently exists within the broader regional economy while encouraging ongoing entrepreneurship, small business development, innovation and investment retention.

3.4.6 Quality of Life

Quality of life is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in relocation decisions.

Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences.

Arnprior offers opportunities for "small-town" living with access to shopping and urban amenities, arts and culture, recreation and the rural countryside. Attraction efforts must also be linked to housing accommodation (both ownership and rental), municipal services and infrastructure, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the Town's attractiveness to older population segments. Arnprior's smaller town urban character offers a high quality of life which is expected to drive net migration from a broad range of demographic groups including the 55-74 age group (i.e. Baby Boomers and younger seniors) and the remaining adult population age groups.

3.5   Observations

For the Town of Arnprior and more broadly across most areas of Eastern Ontario (in particular, smaller urban and rural communities), the COVID-19 pandemic has acted as a near-term driver of housing demand, led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade "city lifestyles" for "smaller town living." It is recognized, however, that the longer-term population and employment growth potential for this area will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in Arnprior and Renfrew County over the long term.

As of 2016, more than one-third of the population in Arnprior is older than 55 years. Over the forecast period, the Town's population base is expected to continue to steadily age. Most notably, the percentage of population in the 75+ age group (older seniors) is forecast to increase over the forecast period from 12% in 2016 to 22% in 2051. Looking forward, this growing older population segment is anticipated to be a key driver of higher-density forms of housing growth in Arnprior, as this group will require a range of housing forms such as low-rise apartments, secondary suites and seniors' residences. The Town of Arnprior is also anticipated to accommodate young adults and

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new families seeking competitively priced home ownership and rental opportunities across a range of low-, medium- and high-density housing forms. Accordingly, opportunities should be explored to provide a mix of future housing across a range of density types to accommodate all age groups and income levels (including affordable housing options).

Chapter 4
Town of Arnprior – Population and Employment Trends

4. Town of Arnprior – Population and Employment Trends

This Chapter provides a description of the local population and employment conditions and residential and non-residential development trends within the Town of Arnprior over the last two decades.

4.1 Population Trends

Figure 7 summarizes historical permanent population trends for the Town of Arnprior over a 20-year period from 2001 to 2021. During this historical time period, Arnprior population increased from 7,380 in 2001 to 9,890 in 2021, an increase of approximately 2,500 people or an annual increase rate of approximately 1.5%.[15] Comparatively, the population base for the Province of Ontario grew at an average rate of 1.0% annually during the same time period.

Figure 7
Town of Arnprior
Historical Total Population, 2001 to 2021
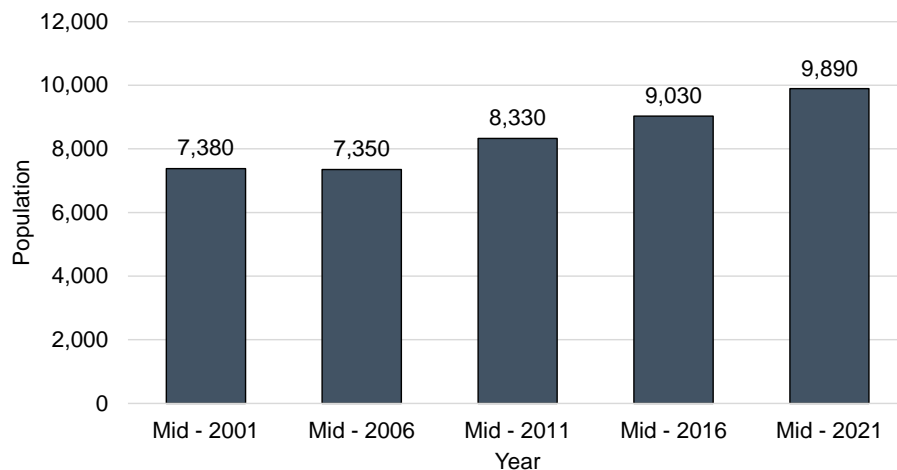
Note: Population figures include a net Census undercount of approximately 2.7%. Population figures have been rounded.
Source: Derived from Statistics Canada Demography Division by Watson & Associates Economists Ltd., 2022.

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[15] 2021 population has been derived from Statistics Canada 2021 Census data.

4.2   Household Trends

4.2.1   Residential Development Activity

Figure 8 summarizes trends in historical residential building permit activity (new units only) for the Town of Arnprior during the 2006 to 2021 period. Over this 15-year period, Arnprior averaged 86 new residential units annually. Between 2006 and 2010, annual building permits averaged 74 units, while in the following period between 2012 and 2016, annual building permits increased slightly to 91 units. During the most recent period (i.e. 2017 to 2021), annual building permits increased significantly and averaged 125 units. This increase was mostly due to the high number of permits issued in 2021.

Figure 8
Town of Arnprior
Historical Residential Building Permit, 2011 to 2021
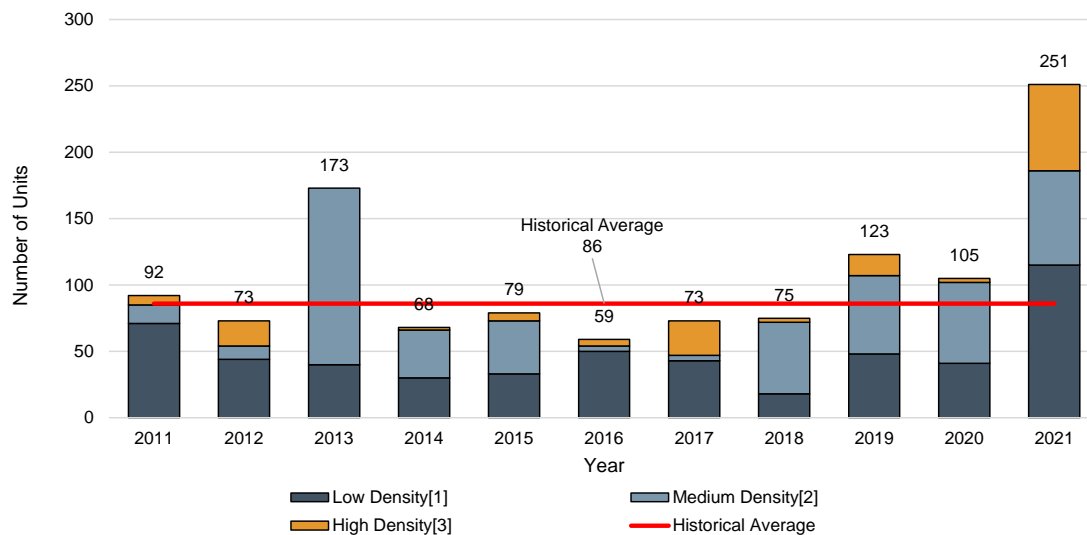
[1] Includes singles and semi-detached units.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Data provided by Town of Arnprior, presented by Watson & Associates Economists Ltd., 2022.

4.3   Recent Employment Growth Trends by Sector

Figure 9 summarizes total employment growth in the Town of Arnprior between 2001 and 2021. During this time period, the Township experienced a decline of approximately 1,000 jobs. The Town's employment activity rate decreased from 74% in

2001 to about 46% in 2021, indicating that the population has been increasing at a much faster rate than the local employment base.[16]

Figure 9
Town of Arnprior
Employment Growth 2001 – 2021
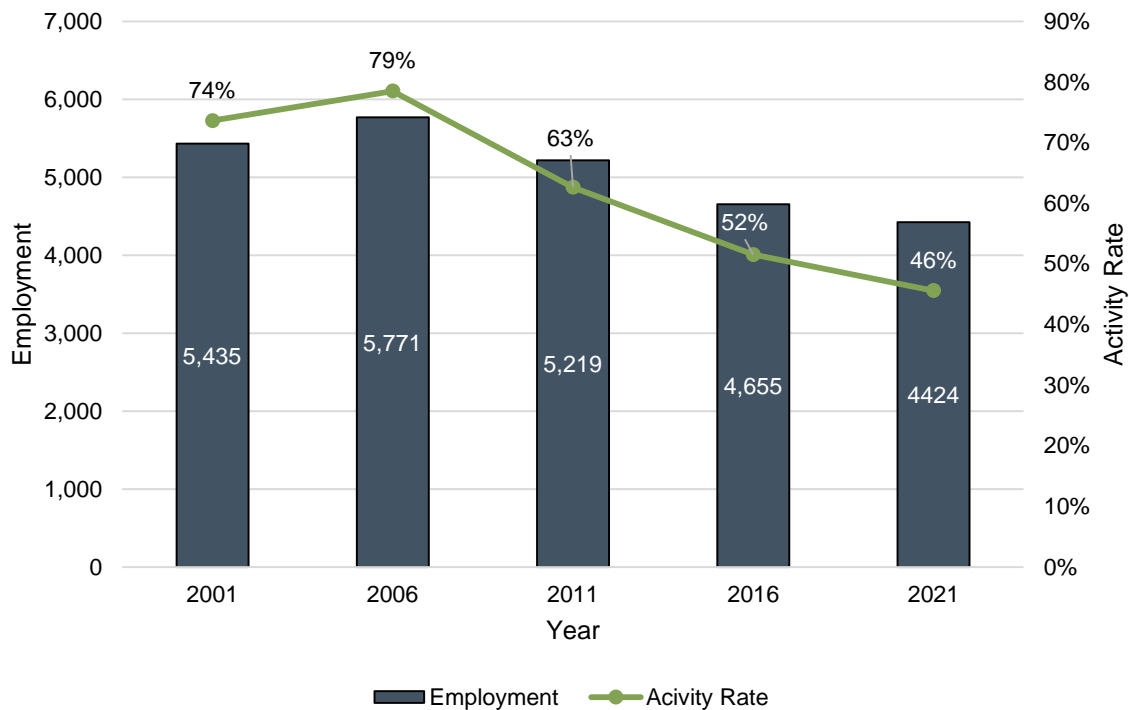
Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2022.

Figure 10 shows the employment share by sector in 2021, representing the number of jobs located within the Town of Arnprior. This includes the live/work labour force, including work at home employees as well as in-commuters. While the Town's economic base is relatively small, it is diverse, spanning a range of employment sectors from manufacturing, construction, accommodation and food services, public administration, and professional, scientific and technical services to transportation and warehousing. The largest sector in the Town is manufacturing, accounting for 20% of the total employment base.

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[16] An employment activity rate is defined as the number of local jobs in a municipality divided by resident population.

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Figure 10
Town of Arnprior
Employment Share by N.A.I.C.S. Code – 2021

Manufacturing 20%

Health care and social assistance 16%

Retail trade 14%

Construction 9%

Accommodation and food services 8%

Educational services 6%

Admin & support, waste mgmt and rem srvcs 5%

Other services (except public administration) 5%

Professional, scientific and technical services 4%

Wholesale trade 3%

Finance and insurance 2%

Public administration 2%

Others 6%

2021 Employment

Source: 2001 – 2016 derived from Statistics Canada Census Data, 2021 from EMSI data by Watson & Associates Economists Ltd., 2022.

As summarized in Figure 11, all the major commercial, institutional, and industrial employment sectors experienced a decline in Arnprior between 2016 and 2021. Employment declined at a particularly higher rate in sectors such as manufacturing, health care and social assistance, retail trade, accommodation and food services. Certain industrial and commercial sectors such as manufacturing, retail trade, accommodation and food services have experienced high rate of decline over the past 5-year period.   Some of this may be due to the disruptions caused by the COVID-19 pandemic. As shown in Figure 4 in Chapter 3, the unemployment rate within the Ottawa Economic Region has been consistently lower than that of the Province and increasing between January 2020 to June 2021. The unemployment rate of the region, however, has been declining and stabilized after the Census enumeration in the more recent months.

Figure 11
Town of Arnprior
Employment Growth, 2016 to 2021
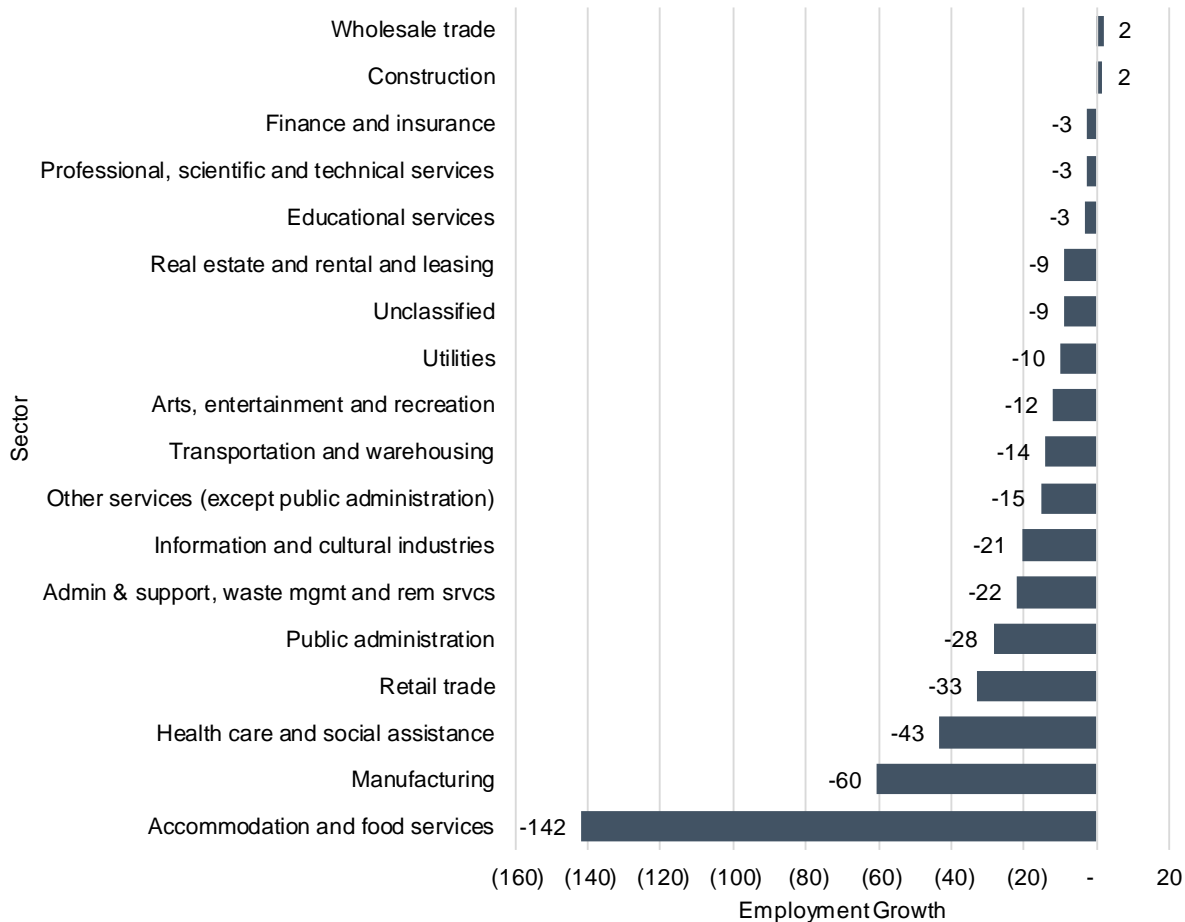
Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2022.

4.3.1 Addressing Regional Economic Opportunities

Figure 12 illustrates the strength of employment sectors in Arnprior relative to the Province using Location Quotients (L.Q.),[17] size (based on employment) and recent growth trends. As shown, Arnprior has a relatively high employment concentration in manufacturing, accommodation and food services, construction, retail trade, health care

[17] An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 identifies that the concentration of employment in a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or "cluster."

and social assistance. In contrast, certain emerging "knowledge-based" clusters, including professional, scientific and technical services, finance and insurance, educational services, public administration, as well as real estate and rental and leasing are less concentrated but have recently been experiencing moderate to strong employment growth.

Figure 12
Town of Arnprior
Location Quotient, 2021

Note: The L.Q. of the mining, quarrying, and oil and gas and extraction industry, and agriculture, forestry, fishing and hunting sectors is 0 and not shown in the figure.
Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2022.

4.4 Observations

With an estimated 2021 population base of 9,890, the Town of Arnprior is the second most populated Town in Renfrew County (following Petawawa), representing

approximately 9% of Renfrew County's 2021 population base.[18] Between 2001 and 2021, the Town of Arnprior's population base grew at an average annual rate of 1.5%, which is the highest growth rate among the municipalities in the County. In comparison, Renfrew County grew at an average annual rate of 0.6% over the same time period. From 2001 to 2021, the Town's housing base grew at an annual average rate of 1.7%, or 84 units per year. More recently, residential building permit activity (new units only) between 2016 and 2020 gained momentum relative to previous periods, averaging 87 new units per year.

With respect to jobs, Arnprior has an estimated employment base of approximately 4,200 as of 2021.[19] Over the past decade, employment growth has been consistently declining across multiple sectors; however, the rate of decline has slowed in the last five years. Looking forward, it is expected that due to growth pressures from the surrounding areas as well as a steady increase in the population of the Town, the employment base will steadily increase, largely in population-related sectors.

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[18] 2021 and forecast population figures for the Town of Arnprior are upwardly adjusted for the net Census undercount, which is estimated at 2.7%.
[19] 2021 employment estimate by Watson & Associates Economists Ltd. Based on EMSI data.

Chapter 5
Housing and Employment Land Supply Analysis

5.   Housing and Employment Land Supply Analysis

5.1   Residential Housing Supply

To determine the Town's capacity to accommodate future housing growth, a residential supply inventory was prepared. This inventory includes vacant residential units in the form of registered subdivisions (remaining to be built), subdivisions that are draft approved, and applications currently undergoing review. In addition, potential units can be accommodated through residential intensification in the Town. Residential intensification opportunities primarily exist in the form of infill as well as longer-term redevelopment opportunities. The Town also has vacant designated residential lands, not currently active in development plans (i.e. greenfield lands), that can accommodate future housing growth. Housing supply opportunities within the development approvals process, intensification and redevelopment, as well as potential greenfield development are discussed in the following sections. Detailed tables regarding the Town's residential supply can be found in Appendix B.

5.1.1   Residential Supply by Status

As of December 2021, approximately 2,300 units were identified within the development approvals process (registered unbuilt, draft approved, and currently under review) across the Town. Figure 13 summarizes the Town's potential housing supply by development status.

Figure 14 summarizes the residential housing supply by land area. Key observations include:

- The Town's active housing supply potential (proposed housing in active applications) is geared towards high-density housing,[20] accounting for 42% of the overall supply, while medium-density units[21] account for 25%, and low-density units[22] account for 35% of the total housing supply;
- There are approximately 871 housing units (23% of the total housing supply) classified as draft approved or registered but unbuilt;
- A total of 1,419 housing units (41% of the identified housing supply) are classified as proposed or under pre-consultation; and
- The remaining vacant designated residential land supply outside of active development applications totals approximately 58 gross ha (140 gross acres) and has an expected development yield of 1,420 units, representing 38% of the supply.[23]

Figure 15 spatially illustrates the Town's housing supply potential by development status, including active residential development applications, lands under the pre-consultation process, and designated vacant lands with no active plans.

Figure 13
Town of Arnprior
Total Housing Potential

Status	Low Density[1]	Medium Density[2]	High Density[3]	Total
Registered Unbuilt and Draft Approved	337	180	354	871
Proposed/Concept/Pre-Consultation and Undergoing Re-zoning	432	382	605	1,419

[20] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units.
[21] Includes townhouses and apartments in duplexes.
[22] Includes singles and semi-detached units.
[23] The number of housing units has been calculated based on the vacant residential land supply and the forecast unit mix. A density assumption for low-, medium- and high-density units has been considered, to arrive at the estimated number of units. Details are provided in Appendix C.

Vacant Land Unit Potential	399	383	638	1,420
Total	1,168	945	1,597	3,710
% Share	29%	24%	46%	100%

[1] Includes singles and semi-detached units.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Data as of February 2022 from the Town of Arnprior by Watson & Associates Economists Ltd., 2022.

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Figure 14
Town of Arnprior
Total Housing Supply

Stage of Development		Land Area,[1] ha
Active Residential Development Applications	A	34.3
Proposed/Concept/Pre-Consultation and Undergoing Re-zoning	B	55.3
Residential Intensification Potential	C	4.7
Vacant Designated Residential Lands	D	57.5
Total Residential Supply	E = A + B+ C + D	151.8

[1] Excludes environmental features.

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Figure 15
Town of Arnprior – Residential Land by Status

Legend

- Municipal Boundary
- Environment Protection
- Property Parcels

Status

- Concept
- Draft Approved
- Pre-Consultation
- Registered
- Rezoning in process
- Vacant

0   0.55   1.1   1.65
km
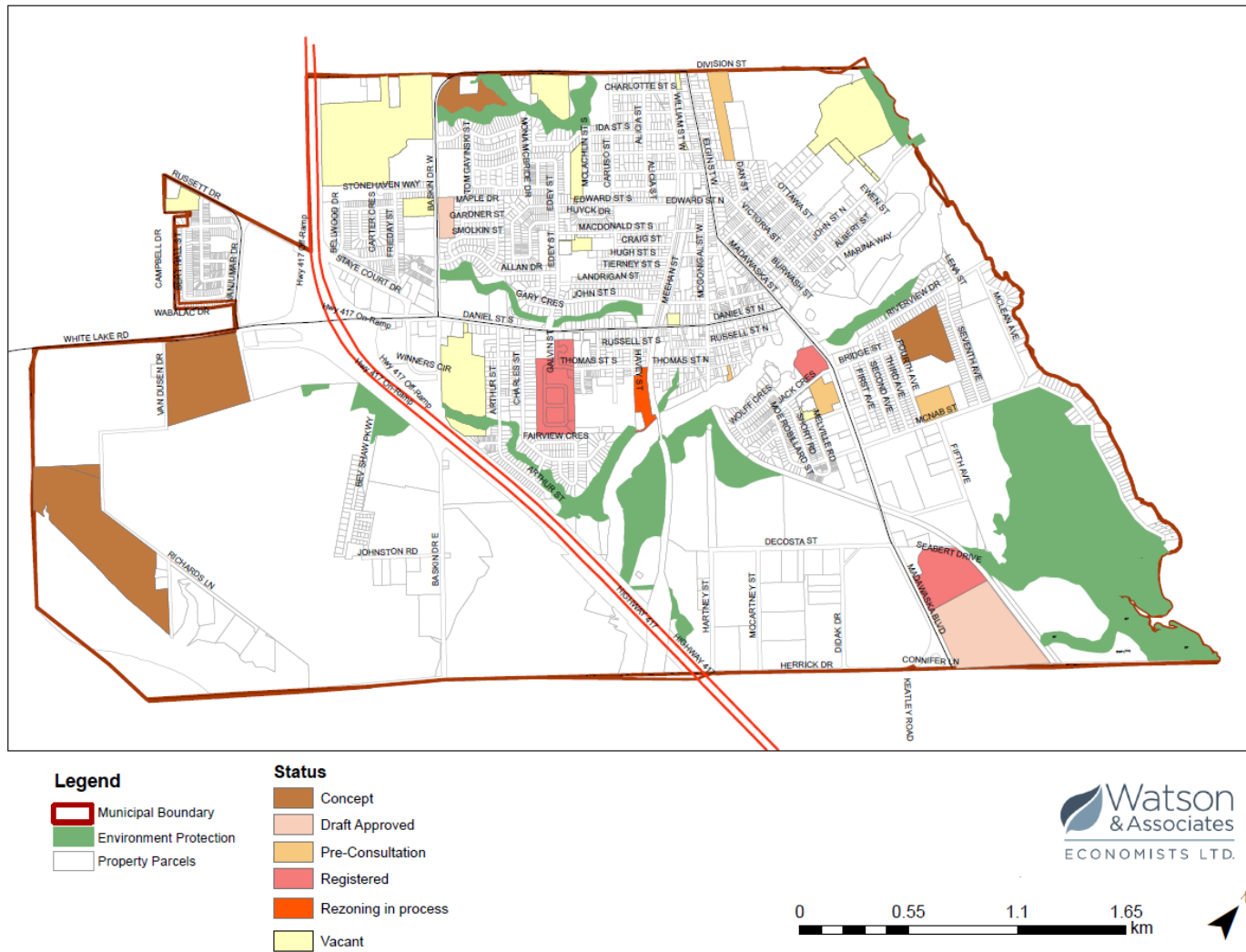
5.1.2 Residential Intensification Opportunities

To ensure the Town of Arnprior has sufficient land to meet housing needs over the next 25 years and beyond, efforts to facilitate residential intensification, where appropriate, should be considered to maximize utilization of existing designated residential and mixed-use areas to ultimately reduce future urban land requirements. In accordance with the P.P.S., 2020, intensification is defined as:

> "The development of a property, site or area at a higher density than currently exists through:
>
> a) redevelopment, including the reuse of brownfield sites;
>
> b) the development of vacant and/or underutilized lots within previously developed areas;
>
> c) infill development; or
>
> d) the expansion or conversion of existing buildings.
>
> Redevelopment is defined as the creation of new units, uses or lots on previously developed land in existing communities, including brownfield sites."

There are a number of factors that are driving demand for intensification within the Town of Arnprior. First, with an aging population in the Town and the surrounding areas, some residents may wish to downsize their current housing accommodations and/or relocate from a rural area to a more urban setting. This places demand for additional forms of high-density housing and seniors' housing to be located within proximity to urban amenities. Second, increasing housing prices within the broader market area has eroded housing affordability over the past decade and is placing increasing demand on smaller, compact homes that are located within urban environments. Third, lifestyle preference across all major demographic groups (i.e. young adults, first-time home buyers, move-up buyers, empty nesters and seniors) is recognized as a key determinant in residential demand by type and location. Environments that integrate residential and commercial uses with other community uses and public open spaces represent opportunities to attract younger working-age residents and, to a lesser extent, empty nesters, seniors and families, over traditional suburban environments. This underscores the concept of "place making" as an increasingly recognized and important planning approach to creating diverse and

vibrant neighbourhoods and workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met.

A residential intensification supply inventory (as of December 2021) was prepared in consultation with the Town (refer to Appendix C for a list of the intensification sites). This inventory considered the following:

- Vacant parcels present in developed residential areas (based on Municipal Property Assessment Corporation (MPAC) property codes) with potential for infill development; and
- Potential brownfield or redevelopment sites identified by the Town.

The above sites were then reviewed and finalized against the following criteria:

- Site size/configuration;
- Compatibility and fit with neighbouring land uses;
- Proximity/access to major roadways;
- Proximity to shopping/community amenities, employment nodes and community facilities;
- Ownership and other constraints; and
- Presence of current proposals on the site.

In accordance with the above-mentioned criteria, it has been estimated that the Town has an infill potential of about 70 units. In addition, the Town also has intensification opportunities through secondary units (basement apartments, "granny flats," etc.). Based on a desktop review of similar municipalities in Ontario, it is estimated that about 2% of the existing ground-oriented homes[24] can accommodate secondary units. This would imply that currently the Town has a potential to accommodate approximately 90 secondary suites to 2051.

Based on the Town's O.P., under section B5, the minimum intensification target is 10%. It is anticipated that the Town will continue to provide potential intensification opportunities through infill as well as through expansion of existing buildings, longer-

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[24] Ground-oriented homes include single detached, semi-detached, and row dwelling types.

term redevelopment opportunities (including brownfield sites) and also through the allowance of secondary units in the Town's existing residential areas.

5.2 Employment Area Land Supply

5.2.1 Gross Vacant Employment Area Land Supply

The Employment Area land supply for the Town has been identified for both Employment designated areas as well as Mix Use Commercial and Employment (M.U.C.E.) areas as defined in section 2.3. As of December 2021, 66 gross ha across 21 vacant developable Employment Area sites were identified within designated Employment and M.U.C.E. areas in the Town of Arnprior. A significant amount of the Town's designated Employment Areas can be found toward the southern and south-eastern area of the Town. Figure 16 geographically illustrates the location of vacant lands within designated Employment Areas and M.U.C.E. areas across the Town. It is also noted that a significant amount of employment lands in Arnprior (44 gross ha or 109 gross acres) are currently constrained or not available for development due to poor access, servicing constraints, or they are surrounded by environmentally sensitive areas which makes access difficult. These lands have not been included in the vacant land supply.

Figure 16
Town of Arnprior – Employment Lands

Legend

- Municipal Boundary
- Environment Protection
- Property Parcels

Status

- Converted to Residential
- Developed
- Non Developable
- Underutilized
- Vacant
- Conversion Applications

Watson & Associates ECONOMISTS LTD.

0   0.55   1.1   1.65 km

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5.2.2 Location Attributes and Size of Vacant Employment Lands

Of the Town's 21 vacant Employment Area sites which are available for development, 83% of the developable land area (52 gross ha or 128 gross acres) is associated with four large sites that are greater than 10 ha (25 acres) in gross land area. For context, a large manufacturing facility or medium-sized logistics and distribution facility averaging roughly 300,000 sq.ft. at approximately 25% lot coverage would require an Employment Area site approximately 15 gross ha (37 gross acres) in size.

As illustrated in Figure 17, vacant Employment Area and M.U.C.E. sites located in Arnprior have a variety of sizes and configurations and can offer marketable opportunities for traditional employment lands development (i.e. industrial type uses) as well as knowledge-based industries, office and retail type development, given their distance to Highway 417 and proximity to urban centres such as Ottawa.

Figure 17
Town of Arnprior
Vacant Employment Lands by Parcel Size

Parcel Size Category	Area (ha)	Number of Parcels
Less than 1 ha	3.4	14
1 - 2 ha	1.4	1
2 - 5 ha	9.2	3
Greater than 10 ha	52.2	3
Grand Total	66.2	21

Source: Data as of September 2020 from the Town of Arnprior by Watson & Associates Economists Ltd., 2022.

5.2.3 Net Vacant Employment Land Supply

Figure 18 summarizes the vacant employment land supply in Arnprior in terms of gross and net developable land area. Of the total 66 gross hectares of designated vacant employment lands identified herein, approximately 47 ha is considered available and developable after adjusting for environmental and servicing constraints, internal infrastructure (e.g. local roads, stormwater management facilities, local environmental features, open space, etc.) as well as long-term land vacancy. The adjustment for long-

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term employment land vacancy represents sites that are unlikely to development over the long term (i.e. 2021 to 2051) due to odd/small lot sizes and poor configuration, as well as underutilized employment sites, sites that may have long-term development constraints and inactivity/land banking which may tie up potentially vacant and developable lands. Long-term land vacancy is a common characteristic experienced in industrial areas throughout the County, the Province and beyond. For the purposes of this analysis, an estimate of 15% long-term land vacancy has been assumed.

Figure 18
Town of Arnprior
Settlement Employment Land Supply (Hectares)

Land Use Category	Total Gross Vacant Employment Land Less Environmental Constraints (ha) (A)	Adjustments for Roads and Other Internal Infrastructure (ha)[1] (C)	Net Developable Vacant Employment Lands (ha) D = A - (B+C)	Net Developable Vacant Employment Lands Adjusted for Land Vacancy (ha) E = D x 0.85	Share of Vacant Settlement Employment Lands (ha)
EMPL	41	7	34	29	62%
M.U.C.E.	25	4	21	18	38%
Total	66	11	55	47	100%

[1] Assumes 25% of the vacant land area net environmental features is required for roads and other internal infrastructure.
Note: 15% long-term vacancy has been used. Numbers may not add due to rounding.
Source: Data as of February 2022 from the Town of Arnprior by Watson & Associates Economists Ltd., 2022.

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5.3   Intensification Potential on Employment Lands

Intensification on employment lands can take a number of forms, including development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization resulting in higher employment density on occupied employment lands. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g. roads, water/sewer servicing), resulting in communities that are more functional and complete.

All the Employment Area lands within the Town are located within the urban boundary and are predominately privately serviced, with some sites partially serviced with water. These sites can accommodate a variety of uses (refer to Figure 16). In total, there are approximately 177 ha (437 acres) of occupied employment lands in Arnprior of which 71 ha (175 acres) are considered underutilized. Medium or large parcels (2 ha and larger) are identified as underutilized based on the following criteria:

- Site is used as a construction laydown yard or for trailer parking. It may include a small building for storage. The site is generally used to support off-site employment;
- Site has the opportunity for expansion or for a severance, as a large portion of the site is vacant. There could be plans for phased development or future expansion of which the Township is aware; and
- Site is developed, but the building on the site is not being used (vacant building). There is opportunity for redevelopment.

These underutilized parcels account for about 25% of the total employment lands in the Town of Arnprior. The largest cluster of underutilized employment land is designated Employment, directly east and adjacent to the Airport lands.

Chapter 6
Arnprior Population and Housing Growth Outlook to 2051

6. Arnprior Population and Housing Growth Outlook to 2051

In accordance with recent demographic, economic and socio-economic trends, as well as the regional and local growth drivers identified in Chapter 3, a range of long-term population, housing and employment forecasts have been prepared for the Town of Arnprior to the year 2051 and are summarized below.[25] In total, three long-term scenarios – low, medium (reference) and high – were developed and are described in this chapter. Further details regarding the approach to preparing the growth forecasts can be found in Appendices D and E.

6.1 Long-term Population and Housing Forecast, 2021 to 2051

The population forecast scenarios are based on a range of assumptions related to total net migration, net migration by age, natural increase (i.e. births less deaths), and employment growth opportunities throughout the Town and surrounding commuter-shed. These scenarios represent the potential range of future growth that can be anticipated for the Town over the next 30 years.

A review of the population growth trends for Renfrew County as projected by the Ministry of Finance (M.O.F.) was also undertaken. Figure 19 highlights the change in population growth outlook anticipated by the M.O.F. between the 2018 and the most recent 2021 projections. As shown, the 2046 population as per the Spring 2021 projections for Renfrew County is higher by 7,600 people and the annual forecast population growth rate increased from 0.3% to 0.5% as compared to the Spring 2018 forecast. This shift by the M.O.F. signifies an increasing long-term growth outlook for Renfrew County. As previously discussed, outward growth pressure from the City of Ottawa and other nearby markets is anticipated to continue to drive population and employment growth within the County. This increased outlook at the County level is anticipated to result in greater forecast population growth for each area municipality within the County, including the Town of Arnprior.

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[25] It is noted that the population growth scenarios include the net Census undercount estimated at 2.5%.

Figure 19
Renfrew County
Ministry of Finance Population Projections, 2016 to 2046
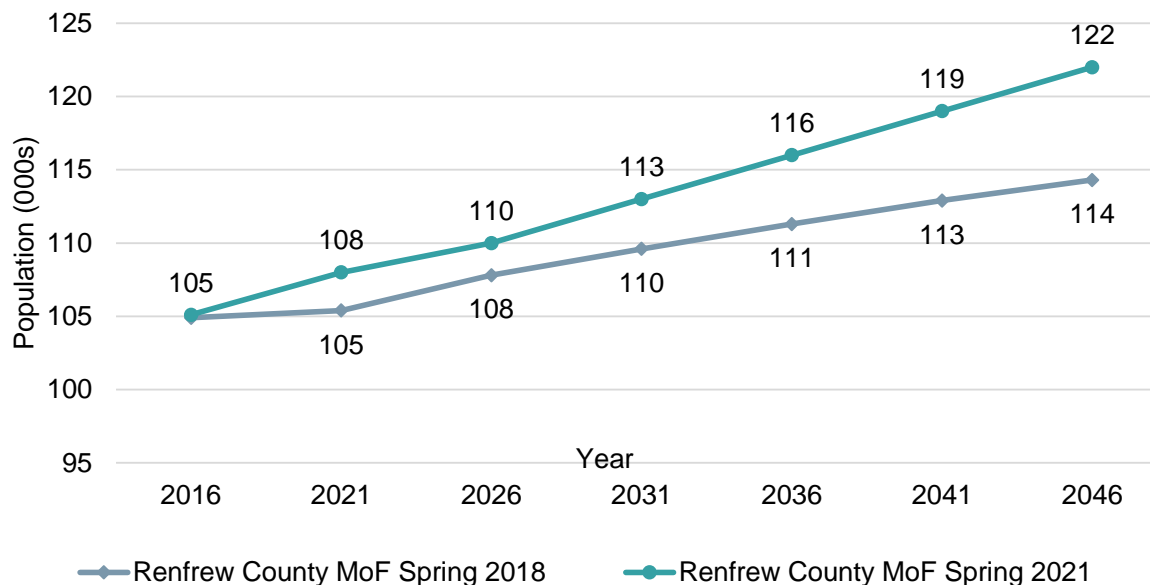
Source: Derived from Ministry of Finance Ontario Population Projections Spring 2018, Summer 2019, Summer 2020 and Spring 2021 releases, by Watson & Associates Economists Ltd., 2022.

6.1.1 Population Forecast, 2021 to 2051

Each of the long-term population growth scenarios represent a varying outlook for the Town of Arnprior within the County context established in the most recent M.O.F. population projections. Between 2001 and 2021, Arnprior accounted for 25% of County-wide population growth. Over the 2021 to 2051 planning horizon, the Low scenario assumes a slightly smaller share of County-wide growth as established through the most recent M.O.F. population projections, while the Medium and High growth scenarios assume that the Town's population growth will account for an increasing share of County-wide growth.

Figure 20 graphically compares the High, Medium (Reference) and Low population growth scenarios for Arnprior. As highlighted, the Town's population outlook at 2051 ranges from 13,000 to 16,000 residents. The Renfrew County O.P. forecast for Arnprior

(High scenario) identified a population of 12,100 by 2036.[26] Both the Medium (Reference) and High scenarios presented in Figure 20 exceed the current O.P. target.

Figure 20
Town of Arnprior
Long-Term Population Forecast Scenarios, 2021 to 2051
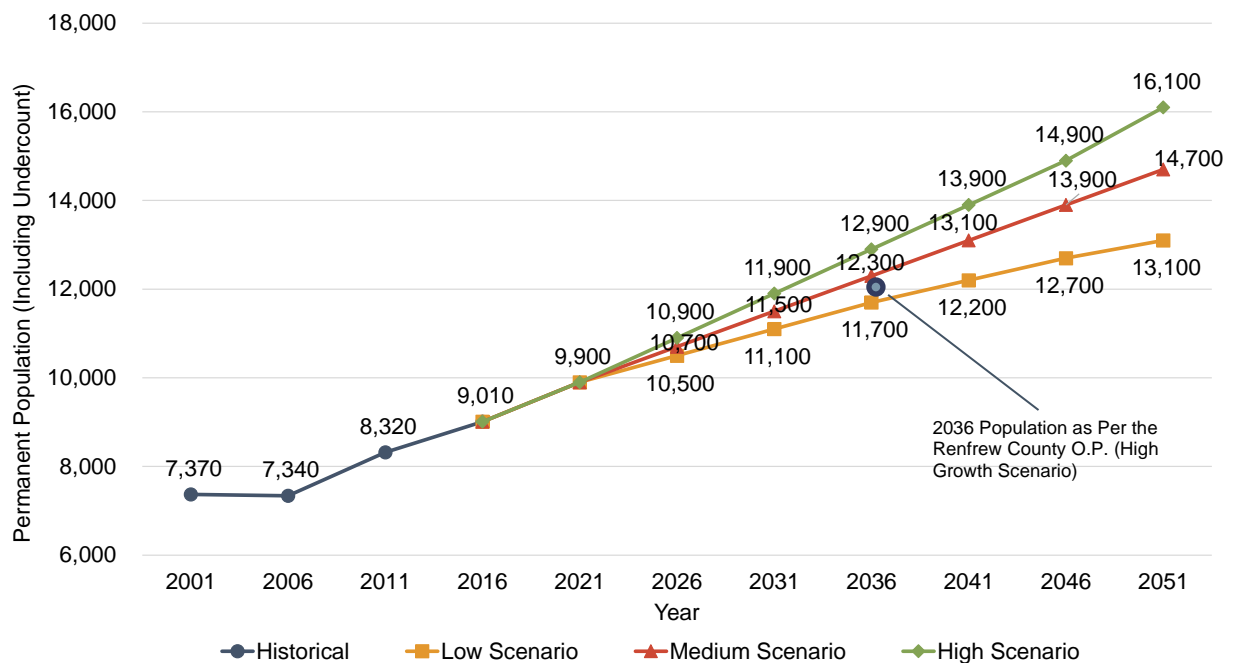
Source: Historical data from Statistics Canada. Forecast prepared by Watson & Associates Economists Ltd., 2021.
Note: Undercount estimated at 102.5%.

Growth Scenarios	2021 Population	2051 Population	2021 to 2051 Population Growth	Annual Population Growth	Annual Population Growth Rate
Low Scenario	9,900	13,000	3,100	100	0.9%
Medium Scenario	9,900	14,700	4,800	160	1.3%
High Scenario	9,900	16,000	6,100	200	1.6%

Note: Population includes net Census undercount estimated at 2.5%
Source: 2021 from Statistics Canada Census, forecast by Watson & Associates Economists Ltd., 2022.

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[26] Including a Census undercount of 102.5%.

Low Population Growth Scenario

Under this scenario, it is assumed that the population base in Arnprior will grow at an average annual rate of 0.9% per year over the forecast period. This results in an incremental population increase of 3,100 persons between 2021 and 2051. Under the Low population forecast scenario, the rate of forecast population growth is anticipated to be higher in the first half of the forecast period and gradually slow during the latter half of the planning horizon. This forecast slowdown in the long-term population growth rate is anticipated as a result of the aging of the Town's population and labour force.

Medium (Reference) Population Growth Scenario

Under the Medium population growth scenario, population within Arnprior is forecast to grow at an annual rate of approximately 1.3% over the forecast period. This scenario assumes that population will increase by approximately 4,800 between 2021 and 2051. Under the Medium population growth scenario, the rate of population growth is also anticipated to gradually slow towards the end of the forecast period.

High Population Growth Scenario

This scenario assumes an average annual growth rate of 1.6% for Arnprior over the 2021 to 2051 forecast period. Accordingly, under the High population growth scenario, Arnprior's total population would increase to 6,100 by 2051.

Preferred Growth Forecast Scenario

The Medium (Reference) growth scenario has been determined to represent the "most likely" long-term population growth outcome for Arnprior for the following reasons:

- Historically, the Town accounted for 15% of County-wide growth between 2001 and 2011, increasing to account for 30% of County-wide population growth between 2011 and 2021. The Reference scenario assumes that the Town's share of forecast growth will continue to increase over the forecast horizon, accounting for about 34% of County-wide growth established in the most recent M.O.F. population projections for Renfrew County between 2021 and 2051.
- Recent building permit activity and active subdivision developments in the planning approvals process suggests that housing growth will remain relatively strong in the Town over the near- and long-term planning horizons. Over the

past decade, housing demand across the Town steadily increased. Over past two years, housing demand was further fueled by the lower interest rate environment as well as continued outward growth pressure associated with COVID-19.[27]

- Looking forward, the Town is anticipated to face continued development pressures due to its proximity to the City of Ottawa and, to a lesser extent, its proximity to the City of Kingston. Relative to these larger urban centres, the Town offers a more competitively priced housing market across a range of grade-related housing products, which are particularly attractive to families. The Town's residential real estate market is also price competitive with respect to high-density housing forms, which are particularly attractive to empty nesters and seniors and somewhat to younger adults and non-family households.

- Local and regional employment growth is expected to continue to steadily increase over the forecast period across a broad range of export-based and population-related sectors. As previously discussed, work at home employment is also anticipated to continue to steadily increase over the long-term planning horizon (refer to section 6.2).

- As previously noted, the quality of life offered in Arnprior is also a key factor influencing the residential location decisions of individuals and families to this area and can also be a factor considered by companies in their respective relocation decisions. Arnprior's vibrant downtown core, stable residential neighbourhoods and surrounding rural landscapes form the "quality of place" that continues to increasingly attract new residents to the Town.

- In general, the long-term growth outlook for the Town is very positive. As previously discussed in Chapter 3, however, there are a number of macro-economic, public health and geo-political headwinds of which to be mindful moving forward when considering the long-term population and employment growth potential for the Town. These factors may reduce near-term immigration levels and provincial economic growth, and may soften the regional housing market over the near term.

Figure 21 summarizes the Reference population growth scenario by major age group over the 2021 to 2051 forecast period for Arnprior. Over the forecast period, the Town's population base is expected to steadily age. Most notably, the percentage of population

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[27] Refer to Chapter 3, section 3.1.

in the 75+ age group (older seniors) is forecast to almost double over the forecast period, from 12% in 2016 to 22% in 2051. The aging of the population and declining population growth resulting from natural increase (i.e. births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within the Town, and subsequently the regional labour force participation rate. Similar to the Province as a whole, the Town will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions.

Figure 21
Town of Arnprior
Population by Age Forecast, 2021 to 2051

Note: Population includes net Census undercount estimated at approximately 2.7%.
Source: Population forecast by age derived from 2001 to 2016 Statistics Canada Census by Watson & Associates Economists Ltd., 2022. 2021 to 2051 population forecast by age prepared by Watson & Associates Economists Ltd., 2022.

6.1.2 Housing Forecast, 2021 to 2051

Figure 22 summarizes the Town's household forecast from 2021 to 2051 in five-year growth increments and by structure type. Housing trends between 2001 and 2021 are also provided for historical context. Key observations are as follows:

- A review of recent residential building permits issued for new dwellings since 2016, as well as the results of the 2021 Statistics Canada Census, indicates that

recent housing demand was significantly higher over the past five-years, compared to the 2011 to 2016 Census period.

- As previously discussed, while there is potential for the near-term housing market to "cool" slightly in the near term, the long-term housing outlook for Arnprior remains very positive given the longer-term regional economic outlook for the Greater Ottawa Region and the Town's competitive housing market. As such, average annual new housing construction activity over the next two to three decades is anticipated to remain above historical levels experienced over the past 15 years.

- More specifically, between 2021 and 2051, forecast housing development is expected to average 87 units annually which is slightly higher when compared to the historical average of 77 units annually over the past 15 years.

- Over the 2021 to 2051 forecast period, new housing is forecast to comprise 36% low-density (singles and semi-detached), 32% medium-density (townhouses) and 32% high-density (apartments) units. A steady increase in the share of medium- and high-density housing forms is anticipated, largely driven by the housing needs associated with the 65+ age group (including seniors' housing) as well as continued upward pressure on local housing prices and declining housing affordability. This trend is further reflected in the active development applications, particularly more recent applications that are in the proposal stage.

Figure 22
Town of Arnprior
Five-Year Incremental Housing Growth – Historical and Forecast, 2006 to 2051
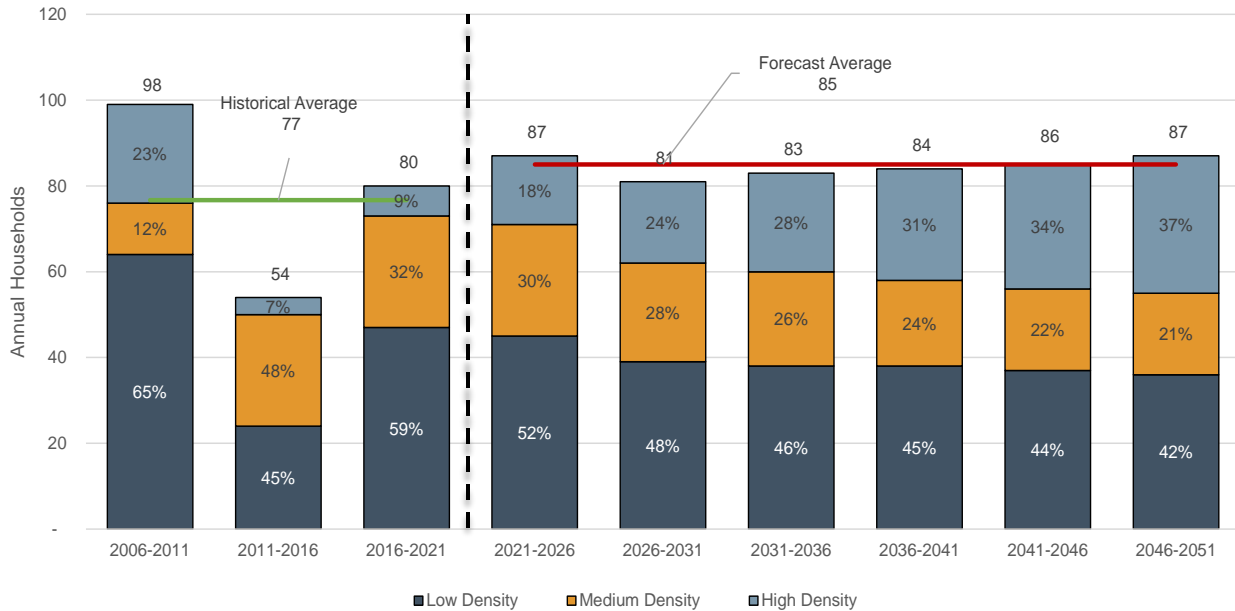
Source: Historical data from Statistics Canada. Forecast prepared by Watson & Associates Economists Ltd., 2021.

Low density includes singles and semi-detached units.
Medium density includes townhouses and apartments in duplexes.
High density includes bachelor, 1-bedroom, 2-bedroom+ apartments.
Note: Figures may not add due to rounding.
Source: Historical 2006 to 2021 figures from Statistics Canada Census Profiles. Forecast prepared by Watson & Associates Economists Ltd., 2022.

Figure 23 summarizes anticipated trends in long-term housing occupancy, or average persons per unit (P.P.U.), for the Town within the 2001 to 2051 forecast period. Key observations include the following:

- Between 2001 and 2021, the average P.P.U. for Arnprior declined from 2.44 to 2.30.
- Over the forecast period, the average P.P.U. for Arnprior is anticipated to continue to gradually decline from 2.30 in 2021 to 2.16 in 2051, largely due to the aging of Arnprior's population and a gradual shift towards medium- and high-density forms of housing.

Figure 23
Town of Arnprior
Historical and Forecast Persons Per Unit (P.P.U.), 2001 to 2051
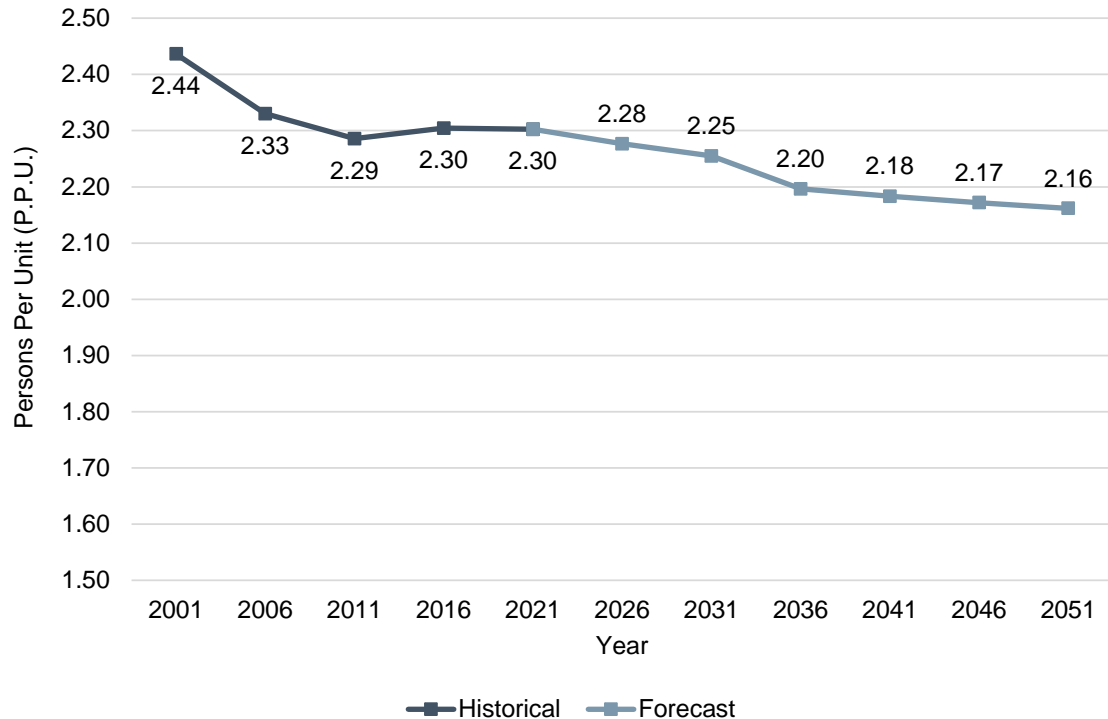
Note: Population includes net Census undercount estimated at approximately 3.5%.
Source: Historical 2001 to 2021 data from Statistics Canada and Demography Division. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2022.

6.2   Long-Term Employment Forecast, 2021 to 2051

Three long-term employment growth scenarios have been developed for the Town for the 2016 to 2051 forecast period, as shown in Figure 24.[28] As previously discussed, the long-term economic outlook for the Town and surrounding commuter-shed is very positive, which supports a steady increase in local employment across a range of industrial, commercial and institutional sectors.

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[28] Includes work at home and no fixed place of work (N.F.P.O.W.).

Figure 24
Town of Arnprior
Long-Term Total Employment Forecast Scenarios, 2016 to 2051
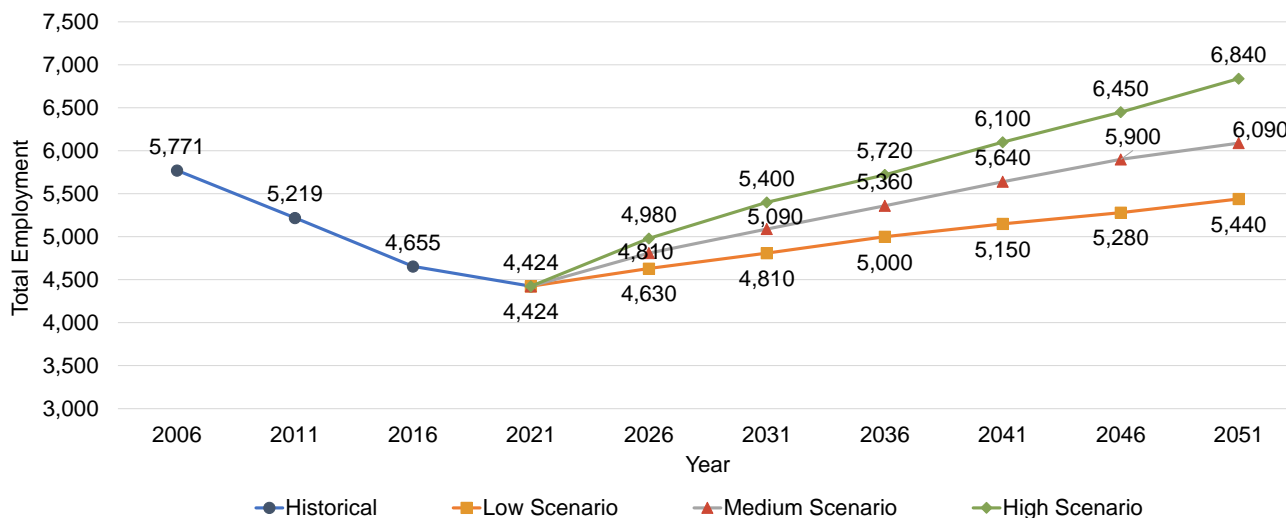
Source: Historical data from Statistics Canada. Forecast prepared by Watson & Associates Economists Ltd., 2021.
Note: Total employment includes work at home and no fixed place of work.

Note: Employment includes work at home and no fixed place of work (N.F.P.O.W.). Figures have been rounded.
Source: Historical 2001 to 2016 data from Statistics Canada Place of Work data. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2022.

Scenarios	2021 Employment	2051 Employment	2021 to 2051 Employment Growth	Annual Employment Growth	Annual Employment Growth Rate
Low Scenario	4,420	5,380	956	30	0.7%
Medium Scenario	4,420	6,030	1,606	50	1.0%
High Scenario	4,420	6,670	2,246	70	1.4%

Note: Employment includes work at home and no fixed place of work. Figures have been rounded.
Source: Historical 2001 to 2016 data from Statistics Canada Place of Work data. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd., 2022.

A range of assumptions was considered in generating the long-term employment scenarios for the Town, including forecast trends in the Town's employment activity rate (ratio of jobs to population), macro-economic trends in the export-based employment sector, and growth in population-related employment associated with population growth within the Town. Based on the assessment of growth drivers for the Town, it is anticipated that employment growth in each scenario will be driven largely by the increasing population base and a demand for population-related employment (including

work at home employment) and, to a lesser extent, the growth in export-based sectors which are generally concentrated in the Town.

Low Employment Forecast Scenario

This scenario assumes that the Town's employment base will grow at a rate of 0.7% per year. Under this scenario, the employment base is forecast to increase modestly between 2021 and 2051 by approximately 1,020 jobs, from 4,420 to 5,380. This scenario assumes that employment to 2051 will still be somewhat lower than the historical high of 5,780 jobs in 2001.

Medium (Reference) Employment Forecast Scenario

In this scenario, employment in Arnprior is expected to increase at a rate of 1.0% annually between 2021 and 2051. Under this scenario, Arnprior's employment base is expected to increase by approximately 1,600 jobs from 2021 to 2051. The Medium growth scenario anticipates total employment will reach 6,030 jobs by 2051.

High Employment Scenario

Under this scenario, the Arnprior employment base is forecast to grow at an average annual rate of roughly 1.4%. Under the High employment scenario, the Town's employment base is forecast to increase by approximately 2,250 jobs, increasing from 4,420 in 2021 to 6,670 by 2051.

6.2.1 Town of Arnprior Reference Employment Forecast, 2021 to 2051

In accordance with the long-term economic outlook for the Town and surrounding commuter-shed, the Medium employment scenario represents the "most likely" or Reference employment growth scenario for Arnprior. As shown in Figure 25, the Town's employment activity rate is expected to slightly decrease from 45% in 2021 to 41% by 2051.[29] This slight decrease is anticipated to be largely driven by local population growth opportunities outpacing employment growth. For the Town of Arnprior, population growth is expected to slightly outpace employment growth due to the aging of the local labour force base.

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[29] Activity rate is the ratio of jobs to population.

Within the local economy, opportunities exist across a range of export-based employment sectors (e.g. transportation, wholesale trade, construction, small-scale manufacturing) as well as population-related employment sectors such as retail, accommodation and food, professional, scientific and technical services, and health care. At present, there are growing employment opportunities within agri-related industries and manufacturing associated with aerospace engineering and pharma production. Forecast job growth is also anticipated to be accommodated through home occupations, home-based businesses, and off-site employment such as construction.

Figure 25
Town of Arnprior
Historical and Forecast Employment Forecast, 2001 to 2051
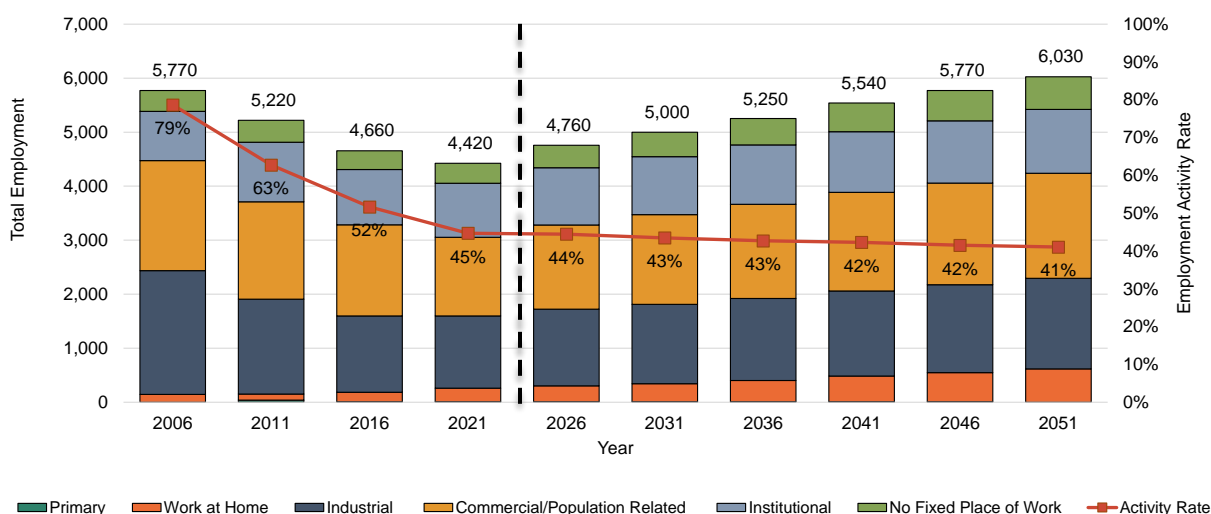
Source: Historical data from Statistics Canada. Forecast prepared by Watson & Associates Economists Ltd., 2021.

Note: Figures have been rounded. Employment figures include work at home and no fixed place of work (N.F.P.O.W.).
Source: Historical 2001 to 2016 from Statistics Canada place of work data. Forecast 2016 to 2051 prepared by Watson & Associates Economists Ltd., 2022.

Figure 26 summarizes the share of employment growth by sector during the 2021 to 2051 forecast period. Land-based employment sectors, including commercial, industrial and institutional are anticipated to account for 63% of employment growth over the forecast period. No fixed place of work (N.F.P.O.W.)[30] and work at home

[30] Statistics Canada defines employees with no fixed place of work as "persons who do not go from home to the same workplace location at the beginning of each shift. Such

employment categories are forecast to comprise the remaining 37% of employment growth.

Figure 26
Town of Arnprior
Share of Employment Growth, 2021 to 2051
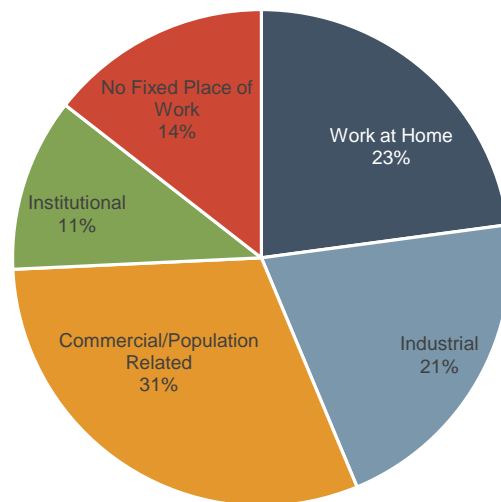
Note: Employment figures include work at home and no fixed place of work (N.F.P.O.W.). Numbers have been rounded and may not add precisely.
Source: Watson & Associates Economists Ltd., 2022.

6.3   Observations

It is recognized that future population and employment growth within the Town of Arnprior is strongly correlated with the growth outlook and competitiveness of the economy within the surrounding commuter-shed – which is largely represented by the City of Ottawa. The City of Ottawa population is projected to steadily grow over the next 25 years, increasing from 1,064,000 in 2021 to 1,410,000 in 2046.[31] This represents an annual population growth rate of 1.1%. Comparatively, the population for the Province as a whole is forecast to increase at an annual rate of 1.2%. The City of

persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
[31] City of Ottawa Official Plan, November 24, 2021.

Ottawa's employment base is also forecast to steady increase over the long term, adding 165,000 jobs to its existing employment base between 2021 and 2046.

Given the Town's proximity to the City of Ottawa, Arnprior is forecast to experience significant outward growth pressure over the next several decades largely due to the Town's price-competitive housing market within Eastern Ontario. Looking forward, housing demand is anticipated to be strongest for grade-related housing options which appeal to new families and move-up home buyers. Demand for low-rise condominium apartments is also anticipated to continue to strengthen given the Town's appeal to empty nesters and seniors.

By 2051, the Town's total population base is forecast to grow to approximately 14,700, under the Reference population growth scenario. This represents an increase of approximately 4,800 residents between 2021 and 2051, or an average annual population growth rate of 1.3% during this time period. Accommodating forecast total population growth in the Town of Arnprior will require approximately 2,560 new households, or approximately 85 new Census households annually over the 2021 to 2051 planning horizon.

It is important to recognize that while the Town's population base is growing, it is also getting older. Between 2021 and 2051, the 75+ age group (older seniors) is forecast to represent the fastest growing population age group with an average annual population growth rate of 3.5%. With an aging population, the Town will be more reliant on net migration as a source of population as opposed to natural increase.

As previously noted, the Town's competitive economic position is highly tied to its ability to attract and accommodate a growing skilled and unskilled labour force pool. To ensure that economic growth is not constrained by future labour shortages, effort will be required by the Town to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the Town within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the Town's attractiveness to older population segments.

In accordance with the comprehensive analysis provided as part of this G.M.S. report, the Reference population and employment scenario is recommended as the "most

likely" long-term growth scenario for the Town. Accordingly, the Reference forecast has been used in Chapter 7 in assessing the Town's long-term urban land requirements.

Chapter 7
Residential and Non-Residential Needs, 2022 to 2047

7. Residential and Non-Residential Needs, 2022 to 2047

This chapter examines the Town's long-term residential land needs over a three-year, 15-year and long-term (25-year) planning horizon in accordance with subsection 1.1.2 and 1.4 of the PPS, 2020. This needs assessment is based on a detailed review of forecast demand and available vacant land supply for the Town.

Requirements for long-term residential land needs in Ontario municipalities are set out in the P.P.S., 2020. Subsection 1.1.2 of the P.P.S. states that:

> "Sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 25 years. However, where an alternate time period has been established for specific areas of the Province as a result of a provincial planning exercise or a *provincial plan*, that time frame may be used for municipalities within the area.
>
> Within *settlement areas*, sufficient land shall be made available through *intensification* and *redevelopment* and, if necessary, *designated growth areas.*"

Subsection 1.4.1 of the P.P.S., 2020 further states:

> "To provide for an appropriate range and mix of housing types and densities required to meet projected requirements of current and future residents of the *regional market area*[32], planning authorities shall:
>
> a. maintain at all times the ability to accommodate residential growth for a minimum of 15 years through *residential intensification* and *redevelopment* and, if necessary, lands which are *designated and available* for residential development; and
> b. maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of

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[32] In accordance with the P.P.S., 2020, the regional market area refers to an area that has a high degree of social and economic interaction. The upper- or single-tier municipality, or planning area, will normally serve as the regional market area. Where a regional market area extends significantly beyond these boundaries, however, then the regional market area may be based on the larger market area. Where regional market areas are very large and sparsely populated, a smaller area, if defined in an official plan, may be utilized.

residential units available through lands suitably zoned to facilitate *residential intensification* and *redevelopment*, and land in draft approved and registered plans."

If the requirements of subsection 1.4.1 of the P.P.S., 2020 are not satisfied, subsection 1.1.3.8 of the P.P.S. states that a planning authority may identify a *settlement area* or allow the expansion of a *settlement area* boundary only at the time of a *comprehensive review* and only where specific criteria are met. The Town of Arnprior urban boundary coincides with the municipal boundary, which means the Town has no ability to expand its settlement area boundary.

7.1 Residential Land Needs, 2022 to 2047

7.1.1 Near-Term Residential Land Needs (Three-Year Requirement)

Figure 27 summarizes the potential supply of available housing units in draft approved and registered plans (unbuilt portion), plus intensification potential in the Town of Arnprior. This housing supply inventory represents Arnprior's minimum three-year housing supply requirement as per section 1.4b of the P.P.S., 2020. Short-term housing demand has been derived from the 2021 to 2026 housing forecast for the Town. The analysis indicates that the Town has an average of nine years total housing supply potential in registered, but unbuilt, plans and draft approved plans, including housing intensification to accommodate short-term housing demand.

Figure 27
Town of Arnprior
Three-Year Housing Requirement (Draft Approved/Registered Units & Intensification)

		Low Density[1]	Medium Density[2]	High Density[3]	Total
Registered and Draft Approved	A	337	180	354	871
Residential Intensification Potential (Short Term)	B	8	21	38	67
Total Unit Supply	C = A + B	345	201	392	938
Short-term Average Annual Demand[4]	D	35	34	18	87
Years of Supply	E = C / D	10	6	22	**11**

[1] Includes single and semi-detached units.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
[4] Derived from 2021 to 2026 housing forecast.
Note: Numbers may not add precisely due to rounding. Numbers as of February, 2022.
Source: Watson & Associates Economists Ltd., 2022.

7.1.2   Long-Term Residential Land Needs (15-Year Requirement)

Figure 28 summarizes the longer-term (i.e. 15 years) housing needs for the Town of Arnprior in accordance with section 1.4.1 a) of the P.P.S., 2020. The total residential supply potential represents all potential housing supply on designated residential lands including units in the planning approvals process and vacant greenfield land, plus identified market potential for infill/redevelopment over a 15-year planning horizon (for additional information please refer to Appendix B). The 15-year housing demand forecast has been derived from the 2021 to 2036 housing forecast for the Town. This analysis indicates that the Town has a more than adequate supply of designated residential lands to accommodate housing demand over the next 15 years across all housing types.

Figure 28
Town of Arnprior
15-Year Housing Requirement

		Low Density	Medium Density	High Density	Total
Registered and Draft Approved	A	337	180	354	871
Proposed / Concept / Pre-Consultation and Undergoing Re-zoning	B	432	382	605	1,419
Residential Intensification Potential (Short Term)	C	47	45	33	125
Unit Potential on Vacant Lands[33]	D	399	383	638	1,420
Total Unit Supply	E = A+B+C+D	1,215	990	1,630	3,835
Long-term Average Annual Demand	F	31	30	22	83
Years of Supply	G = E / F	39	33	74	**46**

Source: Supply information provided by the Town of Arnprior, derived by Watson & Associates Economists Ltd., 2022.

Figure 29 provides a summary of forecast urban residential land needs for Arnprior over the 2022 to 2047 planning horizon. Based on forecast housing demand shown in Figure 29, Arnprior is expected to accommodate an additional 2,130 residential units between 2022 and 2047. Compared to the overall unit supply, there is a forecast surplus of approximately 1,790 residential units in the Town by 2047.

Figure 29
Town of Arnprior
Urban Settlement Area Residential Land Needs, 2022 to 2047

Residential Demand	
Total Housing Demand, 2022 to 2047	2,130
Residential Supply	
Residential Units in Development Approval Process	2,290
Residential Units Accommodated through Intensification	210
Residential Unit Potential on Vacant Lands	1,420
Residential Land Needs	
Housing Unit Surplus	1,790

Source: Watson & Associates Economists Ltd., 2022.

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[33] The Unit potential on vacant lands accounts for a gross to net assumption to account for parkland, infrastructure, permitted institutional and commercial development. Details of assumptions to arrive at the unit potential figures have been detailed in Appendix C.

7.1.3 Employment Area Land Needs, 2022 to 2047

Building on the long-term employment forecast presented in Chapter 6, anticipated Employment Area and M.U.C.E. land needs requirements have been identified based on consideration of the following:

- The share of employment growth on industrial lands by major employment sector (i.e. industrial, commercial, and institutional) within the Employment and M.U.C.E. designations;
- Existing and forecast density (i.e. employees per net acres/ha) of employment on industrial lands;
- Historical non-residential building activity and absorption trends on employment and M.U.C.E. designated lands by key growth area; and
- The amount of long-term vacant industrial and M.U.C.E. lands within Arnprior.

7.1.4 Employment Area Land Demand, 2022 to 2047

In accordance with the permitted uses on industrial lands identified in the Arnprior O.P. and Zoning By-law, a percentage of industrial, commercial and institutional employment growth has been allocated to Arnprior's Employment and M.U.C.E. areas. Figure 30 displays the forecast allocation of employment growth in the industrial, commercial and institutional sectors, informed by a review of the existing uses on these lands, historical development patterns, and future development potential.

Figure 30
Town of Arnprior
Portion of Town's Employment Growth on
Employment Lands by I.C.I.,
2022 to 2047

Employment Sector	Percentage of Total Employment Growth in Employment Areas	Percentage of Total Employment Growth in M.U.C.E. Areas
Industrial	95%	5%
Commercial	5%	50%
Institutional	0%	0%

Source: Watson & Associates Economists Ltd., 2022.

Figure 31 summarizes forecast employment growth in Employment Areas over the next 25 years. In determining the Town's long-term Employment Area land requirements, all estimated work at home and N.F.P.O.W. employment has been excluded from the Employment Area land needs analysis, as these employees do not require land in designated Employment Areas. As summarized below, Arnprior's Employment and M.U.C.E. areas are anticipated to accommodate 38% of the Town's total employment growth from 2021 to 2051. This translates into approximately 514 employees over the 25-year forecast period. Accounting for expansions to existing operations in industrial areas, a 10% intensification adjustment representing approximately 52 employees has been made over the 25-year forecast period. This results in a total forecast of approximately 460 employees in Employment Areas from 2022 to 2047.

Figure 31
Town of Arnprior
Employment Growth, 2022 to 2047

Employment Type	Employment Growth by Sector	Employment Growth in Employment Areas	Employment Growth in M.U.C.E. Areas	Total
Primary	0	0	0	0
Work at Home	295	0	0	0
Industrial	282	268	14	282
Commercial/Population-Related	421	21	211	232
Institutional	144	0	0	0
N.F.P.O.W.	192	0	0	0
Total Employment	**1,334**	**289**	**225**	**514**
Intensification Adjustment		29	23	52
Net Employment Growth		**260**	**202**	**462**

Note: Employment figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd., 2022.

7.1.5 Employment Land Needs, 2022 to 2047

In order to determine Employment Area land needs, it is important to understand existing employment densities for Arnprior. Determining the target densities for the Town required a desktop review to understand the type of businesses operating in these areas as well as a comparison with surrounding municipalities of similar size and nature. Over the long-term planning horizon, the average Employment Area density for Arnprior is forecast to average 15 jobs per net ha and 30 jobs per net ha in M.U.C.E. Areas.

Figure 32 summarizes forecast demand for Employment Area land from 2021 to 2051, in accordance with the assumptions made above. Key observations include the following:

- A land vacancy adjustment of 15% has been applied to the vacant employment land. As previously discussed in Section 5.2.3, this adjustment accounts for parcels which may not develop over the forecast period due to various factors such as landowner choice, servicing constraints, parcel configuration issues etc.;
- Adjusted for land vacancy, there is a combined supply of 47 hectares available for development within Employment Areas and M.U.C.E. lands; and
- Based on the supply and demand for employment land, there is a 23 ha (57 acre) surplus of employment land supply to 2051 across both Employment and M.U.C.E. Areas.

Figure 32
Town of Arnprior
Forecast Urban Employment Area Land Demand by Urban and Community Settlement Area,
2022 to 2047 (Hectares)

LAND NEEDS		Designated Employment Areas	M.U.C.E. Designated Lands
Employment Growth on Employment Lands	A	289	225
Employment Growth through intensification (10%)	B	29	23
Remaining Employment to be Accommodated on Vacant Lands	C = A - B	260	202
Employment Density Assumption (jobs/net ha)	D	**15**	**30**
Employment Land Required (net ha)	E = C / D	17	7
Net Vacant Employment Land (ha)	F	34	21
Net Vacant Employment Land (Adjusted for Land Vacancy) (ha)	G = 0.85 * F	29	18
Vacant Employment Area Land Need, Net Ha (Surplus)	G - E	12	11

Note: All figures referenced in the table above are reported in hectares unless otherwise noted. Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd., 2022.

7.1.6 Employment Area Conversions

Employment Areas within the Town which are under conversion pressure to a non-employment use have been reviewed with Arnprior staff on a site-by-site basis to determine if potential conversions are appropriate and justified from a planning and economic perspective. This review identified two subject sites, which are located within the Town's M.U.C.E. locations, in proximity to Highway 417. Figure 33 displays the location of these subject sites and Figure 34 highlights key details of these sites.

Figure 33
Town of Arnprior
Conversion Sites
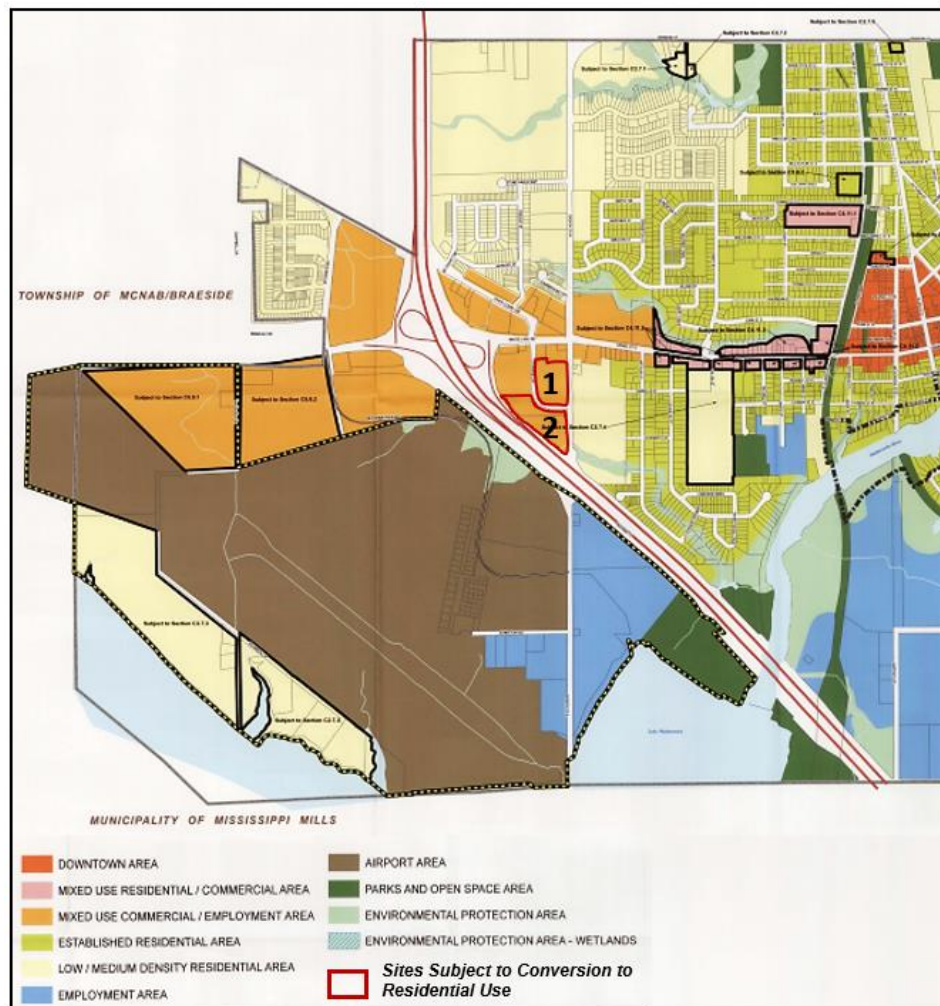
All sites identified in Figure 33 were subject to a detailed evaluation to assess the merits for conversion based on a broad range of evaluation criteria as outlined below. This evaluation has been conducted within the framework of the P.P.S., 2020, section 1.3.2.4., which states:

> Planning authorities may permit conversion of lands within *employment areas* to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.

In addition to the above policy, subsection 1.3.2.5 of the P.P.S., 2020 states:

Figure 34
Town of Arnprior
Details of Sites under Conversion Pressure

#	Site Address	OP Designation / Zoning	Proposed Use	Conversion Request by Owner	Current Use of Site	Site Area (ha)
1	Winners Circle Site 1	Mixed Use - Commercial & Employment	Residential	Yes	Vacant	2.3
2	Winners Circle Site 2	Mixed Use - Commercial & Employment	Residential	Yes	Vacant	1.4

Source: Derived from GIS data received from the Town of Arnprior by Watson& Associates Economists Ltd., 2022.

The sites identified in Figure 33 were subject to a detailed evaluation to assess the merits for conversion based on a broad range of evaluation criteria as outlined below. This evaluation has been conducted within the framework of the P.P.S., 2020, section 1.3.2.4., which states:

> Planning authorities may permit conversion of lands within *employment areas* to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for

employment purposes over the long term and that there is a need for the conversion.

In addition to the above policy, subsection 1.3.2.5 of the P.P.S., 2020 states:

> Notwithstanding policy 1.3.2.4, and until the official plan review or update in policy 1.3.2.4 is undertaken and completed, lands within existing *employment areas* may be converted to a designation that permits non-employment uses provided the area has not been identified has provincially significant through provincial plan exercise or as regionally significant by a regional economic corporation working together with affected upper and single-tier municipalities and subject to the following:
>
> a) There is an identified need for the conversion and the land is not required for employment purposes over the long term;
>
> b) The proposed uses would not adversely affect the overall viability of the *employment area*;
>
> c) Existing or planned *infrastructure* and *public service facilities* are available to accommodate the proposed uses.

Each potential conversion site was further reviewed against a series of localized evaluation criteria to determine its merits for conversion from a site-specific perspective. The localized criteria consider land use and real estate market considerations related to location, size, configuration of the site as well as compatibility with surrounding urban lands uses. The localized criteria are intended to provide further insight with respect to the quality of the subject sites in additional to the broader urban land needs assessment required by the P.P.S., 2020. It is recommended that the enhanced evaluation framework should be used by the Town, in conjunction with the Arnprior O.P., in reviewing Employment Area conversion applications or other candidate Employment Areas for conversion to a non-employment on both vacant and developed Employment Area sites. A summary of the evaluation under the P.P.S., 2020 as well as the localized criteria is provided for each of the employment conversion sites as shown in Figure 35 and Figure 36.

Figure 35
Town of Arnprior
Planning and Economic Evaluation Criteria - Candidate Employment Area Conversion
Sites

Criteria			Description
PROVINCIAL CRITERIA	A	P.P.S	There is an identified need for the conversion and the land is not required for employment purposes over the long term;
	B	P.P.S	The proposed uses would not adversely affect the overall viability of the *employment area*;
	C	P.P.S	Existing or planned *infrastructure* and *public service facilities* are available to accommodate the proposed uses.
LOCALIZED CRITERIA	D	Location	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).
	E	Access	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).
	F	Employment Area Configuration	The site is located outside or on the fringe of an assembly of Employment / MUCE Areas.
	G	Site Configuration	The site offers limited market supply potential for Employment / MUCE Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.
	H	Land Use	The proposed conversion to non- employment uses is compatible with surrounding land use permissions and potential land use conflicts could be mitigated.

	Criteria		Description
	I	Supply	The conversion of the proposed site to non-employment uses would not compromise the overall supply of large Employment / MUCE Area sites for the Town.
	J	Jobs	The conversion request demonstrates total job yield of the site can be maintained or improved.
	K	Municipal Interests and Policy	The conversion request is supported by Area Municipal Councils and does not conflict with municipal interests and policies.

Figure 36
Town of Arnprior
Summary of Planning and Economic Evaluation Results for Conversion Sites

Site #	Site Name	A	B	C	D	E	F	G	H	I	J	K	Recommendation
1	Winners Circle Site 1												Not Recommended for Conversion
2	Winners Circle Site 2												Not Recommended for Conversion

☐ Meets Criteria   ☐ Neutral   ☐ Does Not Meet Criteria

Source: Watson & Associates Economists Ltd., 2022.

The following figures detail out the results of Conversion Analysis for the sites under the provincial and localized criteria:

Figure 37
Town of Arnprior
Planning and Economic Evaluation Results for Conversion: Site - 1

		Comments	
Provincial Policy Statement **1.3.2.5**	A	Based on employment land demand in Arnprior, there is a small surplus of MUCE designated lands over the next 25 years. There is no identified need for conversion as the Town has a surplus of residential lands over the planning horizon.	
	B	The proposed conversion to non-employment use would adversely affect the overall viability of the Employment Area and may place pressure on surrounding areas to undergo conversion as well.	
	C	The existing or planned infrastructure and public service facility needs to accommodate the proposed urban uses over the long-term planning horizon are largely unknown.	
Localized Criteria	D	The site is less than one kilometer away from Highway 417 interchange, which is a significant goods movement corridor within the Town / Region.	
	E		
	F	This site is surrounded by MUCE & residential designated lands and is not located on the fringe of an employment area.	
	G	The site offers good market supply potential for the permitted uses including light industrial, large format retail, development due to location and access to the site, as well as the site configuration.	
	H	Conversion to residential uses has a potential to undermine the planned function of these lands. The proposed conversion to a residential use is not compatible surrounding land uses (including Airport and proposed MUCE uses) and can pose potential land use conflicts.	
	I	The Town has a limited supply of large MUCE sites and conversion of the proposed site to non-employment uses would compromise the Town's overall supply of large MUCE designated sites.	
	J	The conversion request is for residential use and the employment potential of the site will not be maintained, if converted.	
	K	The conversion of the site to a non-employment use would conflict with certain Town's O.P. Policy (Section C5).	
Not Recommended for Conversion			

Figure 38
Town of Arnprior
Planning and Economic Evaluation Results for Conversion: Site - 2

		Comments	
Provincial Policy Statement 1.3.2.5	A	Based on employment land demand in Arnprior, there is a small surplus of MUCE designated lands over the next 25 years. There is no identified need for conversion as the Town has a surplus of residential lands over the planning horizon.	
	B	The proposed conversion to non-employment use would adversely affect the overall viability of the Employment Area and may place pressure on surrounding areas to undergo conversion as well.	
	C	The existing or planned infrastructure and public service facility needs to accommodate the proposed urban uses over the long-term planning horizon are largely unknown.	
Localized Criteria	D	The site is located adjacent to the Highway 417 interchange, which is a significant goods movement corridor within the Town / Region.	
	E		
	F	This site is surrounded by MUCE, residential and Airport designated lands and is not located on the fringe of an employment area.	
	G	The site offers good market supply potential for the permitted uses including light industrial, large format retail, development due to location and access to the site. However, there are parts of the site may be constrained for uses requiring larger floor areas (in terms of the site's shape and configuration).	
	H	Conversion to residential uses has a potential to undermine the planned function of these lands. The proposed conversion to a residential use is not compatible surrounding land uses and can pose potential land use conflicts. The site is adjacent to the highway ramp and that may be a conflict with residential use.	
	I	The Town has a limited supply of large MUCE sites and conversion of the proposed site to non-employment uses would compromise the Town's overall supply of large MUCE designated sites.	
	J	The conversion request is for residential use and the employment potential of the site will not be maintained, if converted.	
	K	The conversion of the site to a non-employment use would conflict with certain Town's O.P. Policy (Section C5).	
Not Recommended for Conversion			

The following is a summary of the results of employment conversion analysis for the three subject sites:

- Both Sites (1 & 2) are not recommended for conversion to a non-employment use.
- The sites score poorly on the evaluation criteria matrix, with only one or two criteria being met for each conversion application.
- There is no need for additional residential land in the Town within the 2051 planning horizon. While there is also a surplus of Employment Area lands, this supply is diminishing and it is important for the Town to have marketable locations to attract industry to Arnprior.
- The sites are located in proximity to Highway 417 and are located in proximity to other Mixed-Use Commercial / Employment Area lands. The conversion of these sites could potentially lead to land-use compatibility issues and begin to undermine the existing structure of the Town's Employment Area lands surrounding the Highway and Airport lands.

7.2 Observations

This section assessed the long-term demand and need for residential and employment land needs over the next 25 years. Based on the assessment, it is observed that the Town of Arnprior has surplus of Residential Area as well as Employment Area lands over the 25-year planning horizon. Due to the finite urban boundary of the Town, the Town should monitor the availability and absorption of its residential lands as well as the supply of shovel-ready employment lands. In addition to this, the Town should continue to identify sites for intensification within Residential Areas as well as Employment Areas.

Chapter 8
Strategic Directions and Recommendations

8. Strategic Directions and Recommendations

The purpose of this chapter is to provide O.P. policy direction and recommendations that will assist the Town of Arnprior in effectively managing its residential and employment lands over the next 25 years.

8.1 Residential Planning Policy Matters

A fundamental objective of the G.M.S. is to understand how and where residential growth within the Town of Arnprior will occur over the long-term planning horizon. Residential growth policies of the Arnprior O.P. will need to be consistent with the P.P.S., 2020 while being considerate of the specific County contexts. It is also required that the Town plan for residential growth in a coordinated, sustainable and resilient manner that makes efficient use of land, resources and infrastructure, while protecting public health and safety.

On this basis, the following residential planning policy matters build on the findings of the G.M.S., while recognizing the provincial, Renfrew County and municipal planning policy framework. Each policy recommendation outlined below establishes current issues and opportunities, which are then contemplated by a range of policy directions to be considered through the upcoming review of the Arnprior O.P. Overall, the residential planning policy matters intend to establish a framework for managing residential growth through responsible land-use planning processes and activities.

Recommendation 1:	Update Population Projections
Opportunities and Challenges	The Town is projected to experience steady population growth over the long-term planning horizon.
Recommended Actions	• Section B of the Arnprior O.P. establishes population and employment growth projections. Policies of the Town's O.P. should therefore be updated to reflect the population growth projections established through the G.M.S over the long-term planning horizon.

Recommendation 2:	Housing Projections
Opportunities and Challenges	The Town's O.P. establishes specific policy direction regarding housing projections by structure type over the long-term planning horizon. The P.P.S., 2020 requires planning authorities to provide for an appropriate range and mix of housing options and densities to meet projected market-based and affordable housing needs.
Recommended Actions	- Section B4 of the O.P. establishes the Town's housing projections. Updated policies regarding housing forecasts are therefore required to be consistent with the housing projections over the planning horizon as established through the G.M.S. - The P.P.S., 2020 states that planning authorities are required to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through residential intensification and redevelopment, and if necessary, lands which are designated and available for residential development (1.4.1.a). Policy B9.1 a) of the Arnprior O.P. currently has a provision for ensuring that there is a minimum of 10-year supply of land for residential development and should therefore be updated to ensure consistency with the P.P.S., 2020 in this regard. - The P.P.S., 2020 also requires planning authorities to "maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans" (1.4.1.b). Currently, policy B9.2 of the Arnprior O.P. is consistent with the P.P.S., 2020. - Through the review of the in-effect Arnprior O.P., a refined policy framework should be developed to provide continued direction that encourages a range of housing

types and densities by tenure (i.e. ownership and rental) in consideration of the updated housing projections to the year 2051. Working with the County, it is recommended that the Town establish an Affordable Housing Strategy to support low- to moderate-income earners.

Recommendation 3:	Residential Intensification
Opportunities and Challenges	Residential intensification contributes to building complete communities, often makes more efficient use of existing infrastructure and public services, and minimizes adverse impacts to the natural environment and agricultural land. The P.P.S., 2020, establishes clear policy direction to guide residential intensification, to ensure sufficient land within settlement areas shall be made available through intensification and redevelopment. On this basis, there is an opportunity for the Arnprior O.P. to establish enhanced policy direction regarding residential intensification.
Recommended Actions	• Arnprior O.P. section B5 states that the "minimum intensification target is 10%." Intensification in this context is defined as housing development achieved through infill, redevelopment or the conversion of existing properties. Based on the analysis of intensification drivers and present infill opportunities, the 10% target is appropriate and should be maintained. It is recommended that the Town monitor residential intensification activity on an annual basis against the O.P. target. • Building on the results of this G.M.S., the Town of Arnprior should further explore long-term intensification opportunities through redevelopment and increased density on underutilized sites. The Town may also want consider available planning policies and tools which would encourage residential intensification to targeted priority

Recommendation 3:	Residential Intensification
	locations (e.g. Downtown Area, Mixed-Use Residential / Commercial Area. • Policies of the in-effect Arnprior O.P. contemplate additional dwelling units through "garden suites" and "secondary suites" under section B9. Through the Town's O.P. Review, consideration may be given to review and/or update these policies to ensure the provisions of the *Planning Act* and O. Reg. 299/19 are implemented, to achieve consistency with the P.P.S., 2020. • The Town of Arnprior O.P. should also be considerate of the P.P.S., 2020 by contemplating a range of housing options, specifically in reference to policy 1.4.3, which requires planning authorities to 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. • The current policy C2.4.1 of the O.P. states that "no less than 50% of the new dwelling units in any contiguous development area that has more than 20 units be comprised of single detached dwellings." It is recommended that this policy is removed or revised to allow for a broader range of housing types.

Recommendation 4:	Plan Monitoring and Evaluation
Opportunities and Challenges	The in-effect Arnprior O.P. provides direction with respect to monitoring the effectiveness of the O.P (Sections E5 & F12 of the O.P.). In this regard, the G.M.S. provides critical input to long-range planning by identifying any future growth, land supply and land demand which ultimately informs a comprehensive policy framework to manage change over the planning horizon.

Recommendation 4:	Plan Monitoring and Evaluation
Recommended Actions	• It is recommended that the Town should incorporate a framework to monitor housing supply and intensification targets at regular intervals in coordination with the County. • Policies providing direction on plan monitoring and evaluation are required to regularly evaluate the forecasts of the G.M.S. (inclusive of housing and land supply) as implemented through the Arnprior O.P. Relevant policies should establish direction to undertake a regular review and update of the growth forecasts in consultation with the County to ensure the Town is providing direction for growth and change in a manner that is consistent with the P.P.S., 2020, and that includes land-use planning and growth management practices that are sustainable over the long-term planning horizon. • Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the Town to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy, demographic and economic factors that influence growth and change over the long-term planning horizon. • The Town should consider various tools for monitoring housing growth, including comprehensive and interactive growth tracking models to monitor population, housing and employment growth as well as performance measures by planning policy area, neighbourhood and small geographic unit on an annual basis.

8.2 Non-Residential Planning Policy Matters

The following non-residential policy recommendations and action items support the guiding principles of the Arnprior G.M.S. and build on the existing provincial, County and municipal planning policy framework. Each strategic recommendation outlines the current issues and opportunities associated with it, as well as policy or process-based actions for Arnprior to consider in its land-use and economic development planning activities.

Recommendation 1:	Update the Employment Forecast as Identified in the Official Plan
Opportunities and Challenges	After continued decline in the Town's employment base since 2006, the Town is forecast to experience steady employment growth over the next several decades, adding approximately 1,700 jobs between 2021 and 2051. As identified in Chapter 7, the Town is anticipated to absorb a total of 17 net ha of employment lands and 7 net ha of M.U.C.E. lands over the next 25 years.
Recommended Actions	• As part of this G.M.S, the Arnprior O.P. should be updated to reflect the most recent employment projections.

Recommendation 2:	Remove Certain Non-Developable Employment-Designated Lands from the Inventory
Opportunities and Challenges	Schedule A of the present O.P. identifies designated Employment Area lands to the southeast of the Town, which are constrained and cannot accommodate development. These lands are generally surrounded by environmental features and do not have access. For the purposes of the land needs calculation in this G.M.S., these lands have been removed from the supply.
Recommended Actions	• Recognize the constraints for the identified Employment Area lands mentioned above and consider re-designating

Recommendation 2:	Remove Certain Non-Developable Employment-Designated Lands from the Inventory
	these lands as non-developable or environmental protection.

Recommendation 3:	Ensure that Employment Lands are Well Adapted to Structural Changes Occurring in the Evolving Macro-Economy
Opportunities and Challenges	Structural changes occurring in the macro-economy pose potential opportunities and challenges for future growth on employment lands in Arnprior. Given evolving trends in the Ontario economy towards the knowledge-based sector, Arnprior will need to encourage and accommodate a wide range of business service and office uses, as well as employment-supportive uses in Employment Areas, where appropriate. This would further support economic diversification of employment areas.
Recommended Actions	• Prestige employment uses should be strategically positioned at locations have strong access and visibility from transportation networks. Prestige employment uses should also be prioritized in areas which are amenity rich, pedestrian oriented and located within proximity to the Town's growing labour force to allow for unique place-making opportunities. • Introduce more defined policy direction in the Town's O.P.s to outline the goals and objectives related to employment-supportive uses in Employment Areas (e.g. non-industrial, non-office uses should be of limited scale, or focused on serving businesses and employees in the Employment Areas). Such uses should be directed to M.U.C.E. Areas as well as within gateway locations or transitioning areas within Employment Areas. Planning for these uses support a viable mix of industrial and

Recommendation 3:	Ensure that Employment Lands are Well Adapted to Structural Changes Occurring in the Evolving Macro-Economy
	commercial land uses and help diversify the Town's tax-base.
	• Consider the introduction of more defined criteria or descriptions regarding the appropriate type, size and location of complementary non-industrial uses in Employment Areas (e.g. eating establishments, personal and health care services and smaller-scale, service-oriented businesses) at strategic and accessible locations in existing and future Employment Areas, where appropriate.

Recommendation 4:	Restrict Major Retail uses in Employment Areas
Opportunities and Challenges	Large freestanding retail uses can potentially create negative impacts on the surrounding industrial or employment uses or impact the future prospects of the area for industrial development. Though large, freestanding, retail uses generate employment, they may also absorb large shares of land through their configuration or requirements (e.g. parking), draw considerable traffic from outside the immediate area (creating congestion in the industrial area), or affect the character of the Employment Area. As such, approaches should be developed to discourage major retail development in Employment Areas and such uses should be restricted to M.U.C.E. and other commercial areas.
Recommended Actions	• It is recommended that the definition of major retail in the Town of Arnprior O.P. is presented as follows: "large-scale or large-format stand-alone retail stores or retail centres, having a gross leasable area of 2,000 m^2 or greater, that have the primary purpose of commercial activities."

Recommendation 5:	Develop a General Marketing Strategy to Promote and Develop the County's Employment Areas
Opportunities and Challenges	Arnprior's Employment Areas are important to the local and regional economy, contributing to economic prosperity through job creation. To ensure the success of Arnprior's Employment Areas, marketing efforts must be geared towards both the broader strengths of the Town as well as specific target sector investment attraction efforts.
Recommended Actions	- Consider a range of promotional tools and incentives which can be used by the Town to inform prospective industries about the opportunities in Arnprior and its communities. These may include business attraction and information packages, press releases, newsletters, report to stakeholders, entrepreneur video stories, tradeshow booths and panels. - Assess and evaluate the Town's role in Employment Area lands development. - Explore opportunities to establish incubator facilities within Arnprior to promote and encourage the development of start-up industries, particularly related to knowledge-based sectors and other export-based emerging industry clusters. Some examples of business incubators within Ontario are the Agri-Business Incubator in Northumberland County, IDEAHUB in the Municipality of Port Hope, Ontario, and the Innovation Cluster in Peterborough County.

Recommendation 6:	Explore Opportunities for Intensification of Employment Lands
Opportunities and Challenges	Future redevelopment, expansion and infill opportunities will continue to exist as the Town's Employment Areas mature and evolve. Intensification potential on occupied and underutilized

Recommendation 6:	Explore Opportunities for Intensification of Employment Lands
	employment lands is not well understood given uncertainties regarding the future intentions of existing landowners.
Recommended Actions	• Promote and facilitate intensification/infill opportunities in existing Employment Areas. • Explore opportunities for infill and redevelopment in mature industrial areas. • Work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assessing feasibility of development. • Explore redevelopment opportunities on brownfield industrial sites. • Explore public-private partnerships which would encourage intensification and infill development opportunities within Employment Areas.

Recommendation 7:	Protect Employment Lands from Conversion to Non-Employment Uses
Opportunities and Challenges	The conversion of Employment Lands (including M.U.C.E designated lands) to non-employment uses negatively impacts the Town's economy in several ways: • It erodes the Town's finite supply of designated Employment Lands; • It potentially fragments the existing Employment Land supply; and • It generally impedes the Town's potential to accommodate "basic" or export-based job opportunities. In very specific cases, through a municipal comprehensive review, the conversion of Employment Lands to non-employment uses may be justified from a land-use planning and economic perspective.

Recommendation 7:	Protect Employment Lands from Conversion to Non-Employment Uses
	While Section B10 of the Town's O.P. provides a policy framework with respect to the protection of Employment Lands, no direction is provided with respect to how subject industrial sites of interest within Employment Areas (i.e. non-employment development applications) are to be evaluated from a planning and economic standpoint for conversion to a non-employment use. Furthermore, Section C5 of the O.P. identifies the planned uses for M.U.C.E. designated areas and highlights the need for maintaining the current function of these lands. M.U.C.E. designated lands provide the Town development opportunities for light industrial as well as knowledge-based industries and office uses which can further the Town's overall economic development.
Recommended Actions	• Incorporate a detailed approach towards evaluating requested conversions on Employment Lands. This evaluation approach should establish criteria which focuses on the existing policy framework (under the P.P.S) and provided in the Town's O.P. as well as other site-specific factors such as location, site size, configuration, marketability, future expansion potential, etc. An evaluation approach has been developed and presented in Chapter 7 of this report.

Recommendation 8:	Develop and Strengthen Policies for Climate Change Adaptation
Opportunities and Challenges	The Town of Arnprior has unique and special natural heritage features and areas. As the Town continues to grow and develop, it is important to take measures to limit local climate change impacts.

Recommendation 8:	Develop and Strengthen Policies for Climate Change Adaptation
Recommended Actions	• Eco-business zones are areas of employment and/or industrial activity that promote environmental quality, economic vitality and social benefits through the continuum of planning, design, construction, long-term operations and deconstruction. The Town should consider policies in the Town's O.P. update to include eco-business zones. • The Town should explore opportunities to accommodate waste recycling/processing and materials reclamation facilities in Employment Areas at appropriate locations (e.g., wooden shipping containers and pallets are often discarded after one use.). Recycling discarded products and by-products is a manufacturing process that avoids extracting natural resources to manufacture products. These facilities would require appropriate buffering from prestige Employment Area uses and sensitive uses. There is an opportunity to explore this concept with eco-business principles. • Continue to promote the Energy Efficient Development in line with the Renfrew County's Energy Management Plan • Explore opportunities to attract investment in renewable energy systems (e.g., geothermal, district energy) in Employment Areas.

Recommendation 9:	Conduct a Commercial Land Needs Study that Specifically Addresses the Town's Retail Requirements and Commercial Structure
Opportunities and Challenges	Through the G.M.S. exercise, focus has been directed to residential growth within the Town's Urban Areas as well as a focus on development within Arnprior's Employment Areas.

Recommendation 9:	Conduct a Commercial Land Needs Study that Specifically Addresses the Town's Retail Requirements and Commercial Structure
	Further review would be required to understand the retail and commercial land needs within the Town.
Recommended Actions	- To better understand these needs, a commercial land needs study could be undertaken. - The results of a commercial land needs study would provide the Town with sufficient background to plan for a range of commercial uses.
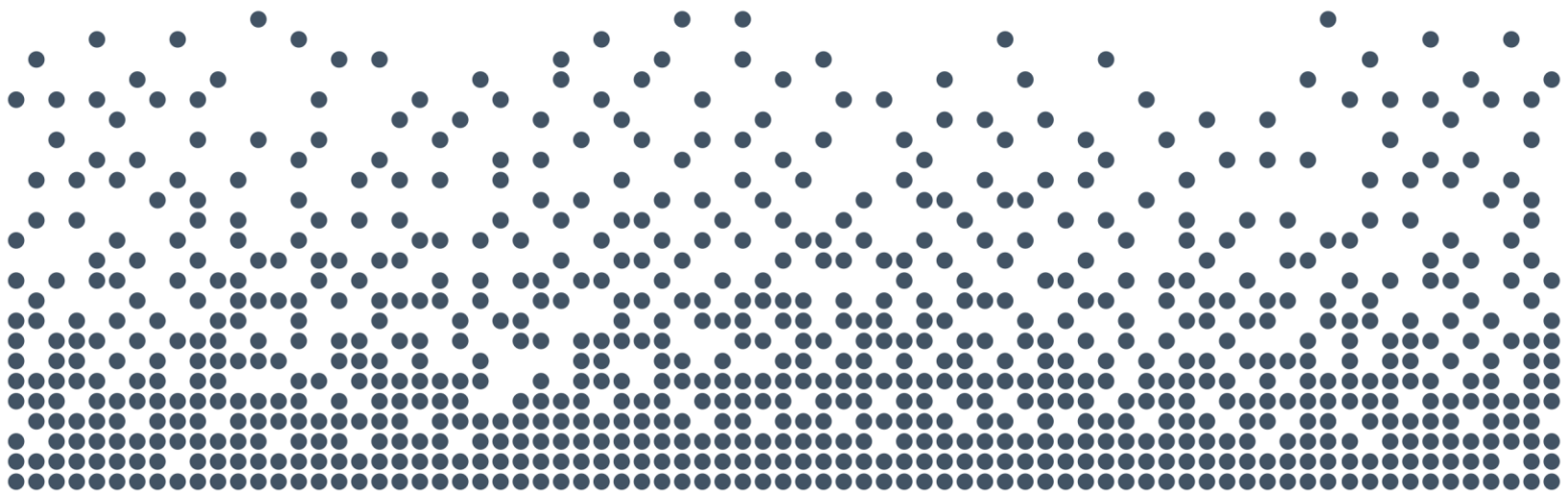
Appendices

Appendix A
Town of Arnprior Commuting Trends 2006 - 2016

Appendix A: Town of Arnprior - Commuting Trends, 2006 and 2016

Where Arnprior Residents Work
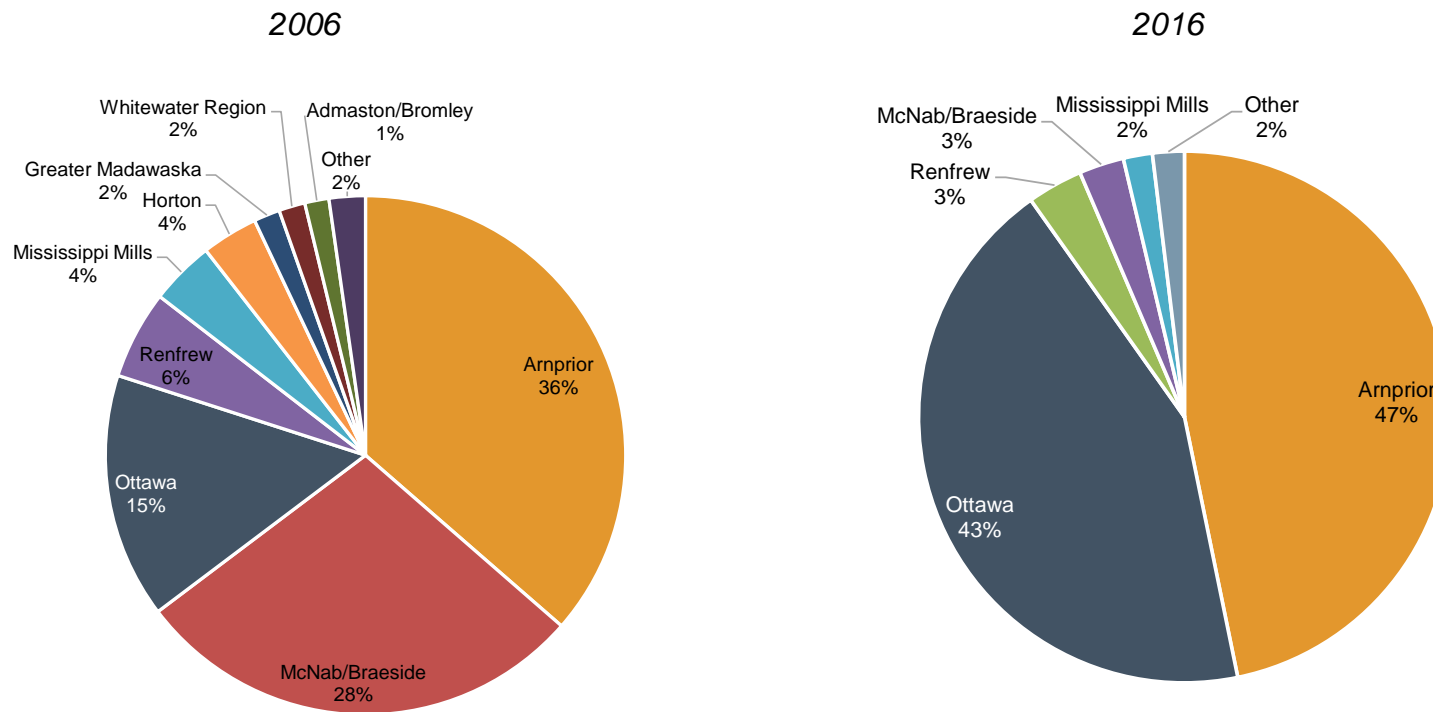
2006

2016

Whitewater Region
2%

Admaston/Bromley
1%

Other
2%

Greater Madawaska
2%

Horton
4%

Mississippi Mills
4%

Renfrew
6%

Ottawa
15%

McNab/Braeside
28%

Arnprior
36%

McNab/Braeside
3%

Mississippi Mills
2%

Other
2%

Renfrew
3%

Arnprior
47%

Ottawa
43%

Note: Figures may not add precisely due to rounding.
Source: 2001 data from Statistics Canada, 2001 Census of Population, Statistics Canada Catalogue no. 95F0408XCB2001006. 2016 data from Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016325 summarized by Watson & Associates Economists Ltd., 2022.

Where Arnprior Employees Live
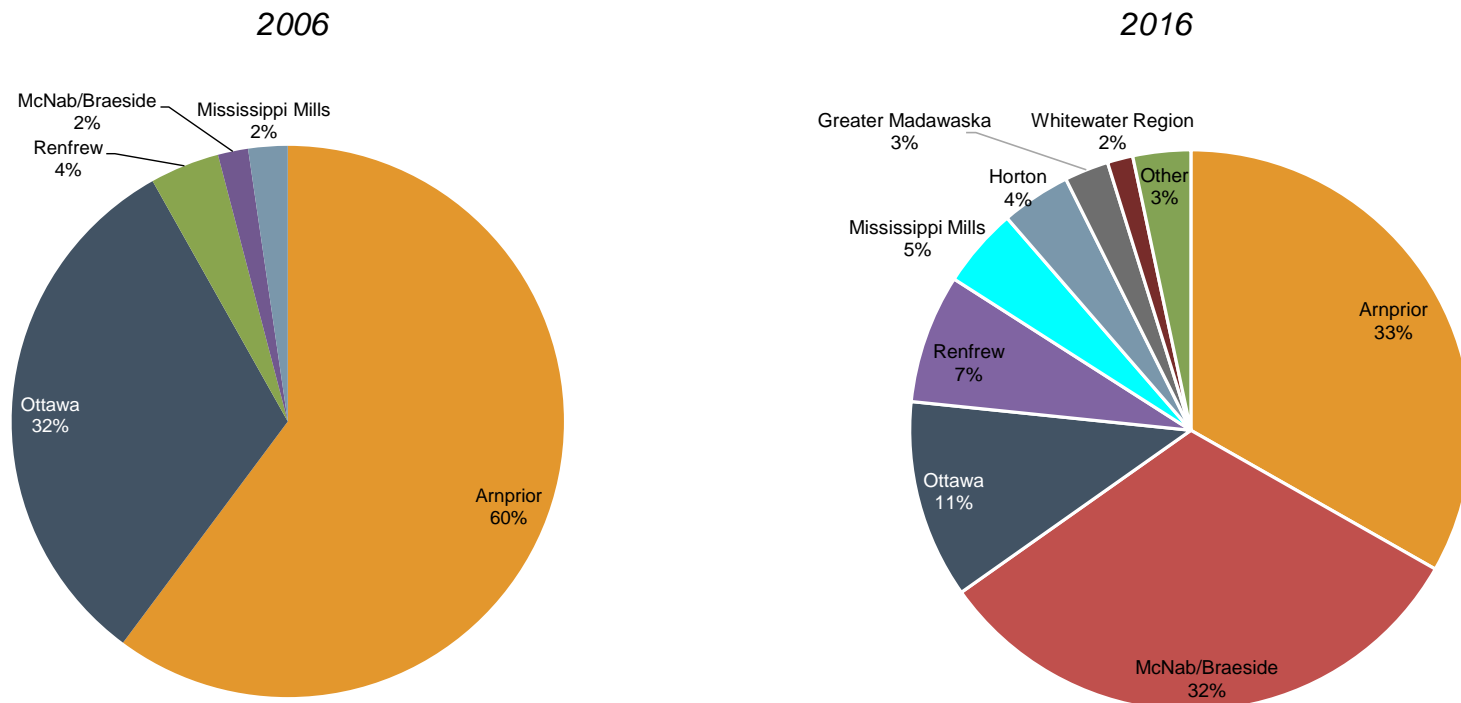
2006

Pie chart for 2006:
- Arnprior 60%
- Ottawa 32%
- Renfrew 4%
- McNab/Braeside 2%
- Mississippi Mills 2%

2016

Pie chart for 2016:
- Arnprior 33%
- McNab/Braeside 32%
- Ottawa 11%
- Renfrew 7%
- Mississippi Mills 5%
- Horton 4%
- Greater Madawaska 3%
- Other 3%
- Whitewater Region 2%

Note: Figures may not add precisely due to rounding.
Source: 2001 data from Statistics Canada, 2001 Census of Population, Statistics Canada Catalogue no. 95F0408XCB2001006. 2016 data from Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016325 summarized by Watson & Associates Economists Ltd., 2022.

Appendix B
Planning Considerations for an Evolving Economy

Appendix B: Planning for Industrial Sectors

Recognizing recent structural changes in the regional economy there is a need for the Town of Arnprior to ensure that its established and planned Employment Areas are well aligned with anticipated market demand. This requires that near-term (i.e. shovel-ready lands) and longer-term land needs as well as competitive attributes (i.e. location, access, size, configuration, etc.) are adequately addressed with respect to the Town's Employment Area.

It also important that the Town's Employment Areas are planned and designed to accommodate a broad range of established and emerging industrial sectors related to advanced manufacturing, Goods Movement, construction, utilities and employment supportive uses. Such Employment Areas should also offer supportive infrastructure (i.e. full municipal water and wastewater services), urban amenities, and synergies to attract the growing knowledge-based sector. Two key real estate trends which influence the planning of Employment Areas in today's economy, are explored below.

Integrated Development in the Advanced Manufacturing Sector

Many of the growing sub-sectors in advanced manufacturing such as energy, automotive, technology and clean tech require integrated operations on larger sites in a "campus-style" setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics, and on-site manufacturing.

To address the broad needs of industry, a range of Employment Areas by site size, access, designation/zoning, and surrounding land use are required which provide significant land area to accommodate mid to large-scale uses with opportunities for future expansion potential. In industrial/business parks, prestige office uses are often positioned at gateway locations (i.e. at major highway interchanges) with direct highway access/exposure as well as strong connectivity to arterial roads and offer live/work opportunities.

Growing Demand in the Goods Movement Sector Driven by E-Commerce

As previously mentioned, increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced

locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas. Across North America, the Goods Movement industry is continuously evolving at a rapid pace responding to growing consumer demand and well as increased expectations with respect to speed of delivery. As discussed below, e-commerce and technological improvements represent the biggest drivers of change in the Goods Movement industry, driven by the rapid growth of mobile technology.

For the economic region of Renfrew County, a growing share of development within the Goods Movement Sector is anticipated related to "last mile" urban warehousing facilities that focus on serving the steadily growing urban population base through the final transportation of goods from the distribution centre or fulfillment hub to the final destination (i.e. the retailer or consumer). Continued growth in e-commerce is anticipated to reduced demand for retail square footage, in particular retail space for goods-based retailers, while increasing employment growth and land demand related to the logistics sector.[34]

Retail e-commerce sales have risen steadily across Canada, with the proportion of online sales rising from 2.4% in 2016 to a high of 11.4% percent in April 2020, but since then has declined and levelled off at 7.5% as of April 2021.[35] Further, the digital impact of retail sales is even greater with mobile purchasing platforms (e.g. UberEats, Skip the Dishes) that support retail sales of local retailers. As the e-commerce market continues to expand, this component of the supply chain is becoming increasingly important to businesses as it has a direct influence on the customer experience. In addition to the need to provide timely, accurate service delivery, it is also critical for industry to ensure cost efficiency given that 30% to over 50% of total parcel delivery cost is associated with this leg of the supply chain.[36] [37]

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[34] Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores, home improvement stores and stores selling general merchandise, apparel and furniture.

[35] Statistics Canada Retail e-commerce sales, Table 20-10-0072-01.

[36] Breaking Down the "Last-Mile Delivery": Challenges and Solutions. October 12, 2016.

[37] Parcel Delivery. The Future of the Last Mile. McKinsey & Company. September 2016.

The Rising Share of Off-Site and Work at Home Employment

Over the 2001 to 2016 period, the percentage of Arnprior's labour force defined as having a usual place of work declined, offset by a gradual increase in the share of work at home employment and a steady increase in the share of off-site employment, also referred to as employees with no fixed place of work (N.F.P.O.W.).[38]

Within Renfrew County, the rising share of labour related to N.F.P.O.W. has been primarily driven by steady growth in the transportation and construction sectors which are typically characterized as having a higher percentage of off-site employees. Technological innovation and improved broadband regional telecommunications have also been, and will continue to be, key drivers of economic expansion in knowledge-based sectors as well as the steady rise of the gig economy.[39] One of the key objectives that is identified in Renfrew County's Strategic Plan is to secure funding for Eastern Ontario Regional Network (E.O.R.N.) broadband infrastructure. Looking forward, continued advances in technology and telecommunications (e.g. 5G technology) are anticipated to further enable remote work patterns and ultimately increase the relative share of off-site employment over the long term.[40] Over the coming decades, work at home and N.F.P.O.W. employment is generally expected to steadily increase as a result of these trends. Demographics and socio-economics also play a role in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in the County and the Town will utilize technology to allow them to supplement their income in more flexible ways in contrast to traditional work patterns.

Planning for the Mixed-Use Areas

The commercial base in Arnprior is primarily comprised of small local-serving retail and office uses concentrated in the downtown areas. Apart from that the larger retail development is planned within the Mixed-Use areas. The Arnprior O.P. gives provision

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[38] Statistics Canada defines employees with no fixed place of work as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
[39] The gig economy is characterized by flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform.
[40] Arnprior Strategic Plan 2021 to 2026.

for two types of Mixed-use areas, i.e. Mixed Use Residential Commercial and Mixed-Use Commercial Employment. Local-serving retail uses consist of commercial operations that serve the immediate needs of the local population, including grocery, pharmacy, automotive services, food services and other commercial services. These retail uses are primarily located in the downtown and MURC areas. Such uses tend to have a smaller retail footprint ranging from 1,500 sq.ft. (140 sq.m) to 40,000 sq.ft. (3,700 sq.m) and are less susceptible to the impact of e-commerce competition. Comparison retail uses on the other hand are typically larger and are clustered with similar uses. Further, these uses require larger trade areas that compete on product selection and price which is more susceptible to e-commerce competition.

Arnprior's Strategic Plan acknowledges the importance of these settlement areas, that each area is unique, and that publicizing and revitalizing these areas will not only benefit Arnprior, but the County as a whole.[41]

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[41] Arnprior Strategic Plan 2021 to 2026.

Watson & Associates Economists Ltd.
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Appendix C
Town of Arnprior Vacant Supply

Appendix C: Residential Supply and Employment Supply for the Town of Arnprior (As of February 2022)

C.1 Vacant Employment Lands

S. No	Roll Number	Zone2017	Status	Gross Area (ha)	Net Area (ha)
1	470200001500400	EMPL(H4)	Vacant	0.247	0.24655326
2	470200001500610	EMPL(H4)	Vacant	11.323	9.058382845
3	470200004007710	EMPL(H4)	Vacant	0.304	0.304164933
4	470200004009600	EMPL(H4)	Vacant	0.021	0.0212199
5	470200004506610	EMPL(H4)	Vacant	0.335	0.335303587
6	470200004506800	EMPL(H4)	Vacant	4.180	3.343931574
7	470200004508000	EMPL(H4)	Vacant	0.538	0.538018626
8	470200004508000	EMPL(H4)	Vacant	21.089	16.87157265
9	470200006501200	EMPL(H4)	Vacant	0.047	0.047345412
10	470200006502100	MU-CE	Vacant	0.103	0.10312348
11	470200006502800	MU-CE	Vacant	0.090	0.0903684
12	470200007000300	EMPL(H4)	Vacant	2.731	2.731352626
13	470200007000320	EMPL(H4)	Vacant	0.524	0.523910307
14	470200007001320	MU-CE	Subject to conversion	1.373	1.373047655
15	470200007001330	MU-CE	Subject to conversion	2.253	2.253172115
16	470200007001600	MU-CE	Vacant	0.093	0.0934875
17	470200007001700	MU-CE	Vacant	0.287	0.287318073
18	470200007002050	MU-CE(H3)	Converted to Residential	13.793	11.03411963
19	470200007002700	MU-CE	Vacant	0.200	0.199745175
20	470200007003300	MU-CE	Vacant - Proposal for new Mall	0.318	0.317684051
21	470200007003305	MU-CE	Vacant - Proposal for New Mall	0.275	0.274637213
22	470200007007500	MU-CE	Vacant	19.83	15.86450245

Source: Town of Arnprior Planning Department as of September 2020 summarized by Watson & Associates Economists Ltd., 2022.

C.2 Residential Sites under Active Development Applications and Vacant Residential Land

FID	Parcel Roll #	Status	STATUS	Land Area	Number of Units			
					Low Density[1]	Med Density[2]	High Density[3]	Total
0	470200001501300	Active Site Plan Pre-Consultations - High Density Apartments	Pre-Consultation	1.771187411			185	185
1	470200001501450	Vacant Residential/Future Development Lands	Vacant	0.32070624				0
2	470200001501485	Approved Site Plan / Plan of Subdivision	Registered	1.938813613			118	118
3	470200002000300	Vacant Residential/Future Development Lands	Pre-Consultation	0.145096628	0	29		29
4	470200002519700	Vacant Residential/Future Development Lands	Vacant	0.360594525				0
5	470200002519950	Vacant Residential/Future Development Lands	Vacant	0.1846978				0
6	470200002519950	Vacant Residential/Future Development Lands	Vacant	0.05481727				0
7	470200003004920	Vacant Residential/Future Development Lands	Pre-Consultation	3.208188506		60		60
8	470200003016000	Vacant Residential/Future Development Lands	Vacant	1.792694278				0
9	470200003016000	Vacant Residential/Future Development Lands	Vacant	0.81916238				0
10	470200003016000	Vacant Residential/Future Development Lands	Vacant	0.087246651				0
11	470200003016000	Vacant Residential/Future Development Lands	Vacant	10.50151109				0
12	470200004011603	Active Site Plan Pre-Consultations - High Density Apartments	Pre-Consultation	2.47372248			256	256
13	470200004011610	Vacant Residential/Future Development Lands	Pre-Consultation	5.309560332	55	38	22	115
14	470200005000200	Vacant Residential/Future Development Lands - Concept of Subdivision	Concept	3.412333787	80			80
15	470200005000200	Vacant Residential/Future Development Lands - Env Protection	Vacant	2.829774445				0
16	470200005000780	Vacant Residential/Future Development Lands	Vacant	3.328355601				0
17	470200005000780	Vacant Residential/Future Development Lands	Vacant	0.539948396				0
18	470200005507200	Vacant Residential/Future Development Lands	Vacant	1.62295898				0
19	470200005516605	Vacant Residential/Future Development Lands	Vacant	0.705627392				0
20	470200006019300	Draft Plan Approved Plans of Subdivision	Draft Approved	1.615343881		24	56	80
21	470200006502100	Vacant Residential/Future Development Lands	Vacant	0.914285742				0
22	470200006502100	Vacant Residential/Future Development Lands	Vacant	7.798602817				0
23	470200006502100	Vacant Residential/Future Development Lands - Env Protection	Vacant	1.083296823				0
24	470200006502100	Vacant Residential/Future Development Lands	Vacant	0.10312348				0
25	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	2.040692976	124	28		152
26	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	0.590138905				

FID	Parcel Roll #	Status	STATUS	Land Area	Number of Units			
					Low Density[1]	Med Density[2]	High Density[3]	Total
27	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	0.239340486				
28	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	0.127812425				
29	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	0.711007516				
30	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	0.705134561				
31	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	0.190464491				
32	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	1.58247043				
33	470200006510400	Draft Plan Approved Plans of Subdivision	Registered	2.004448056				
34	470200006515200	Active Site Plan Pre-Consultations - High Density Apartments	Rezoning	1.872790736			142	142
35	470200007003750	Vacant Residential/Future Development Lands	Vacant	1.438719612				0
36	470200007004000	Vacant Residential/Future Development Lands	Vacant	21.56724063				0
37	470200007007100	Vacant Residential/Future Development Lands - Tartan Concept for Subdivision	Concept	0.664255245	137	143		280
38	470200007007100	Vacant Residential/Future Development Lands - Tartan Concept for Subdivision	Concept	22.28916497				
39	470200007008148	Vacant Residential/Future Development Lands - Concept of Subdivision (Condo Townhouse Development)	Vacant	1.4450192				0
41	470200007008100 (part)	Vacant Residential/Future Development Lands	Draft Approved	15.36562176	213	128	180	521
42&43	470200007008100 (part)	Draft Plan Approved Plans of Subdivision	Registered	7.226649898				
44	470200007002050	OPA for Conversion from MUCE Designation	Concept	13.79	160	112		272

[1] Includes singles and semi-detached units.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Town of Arnprior as of February 2022 summarized by Watson & Associates Economists Ltd., 2022.

C.3 Parcels with Infill / Intensification Potential

ID	Property Roll Number	Current Land Use	Parcel Area (sq. m)
1	470200004504910	Vacant	646
2	470200004505700	Vacant	612
3	470200002519950	Vacant	2395
4	470200002010300	Vacant	629
5	470200002010410	Vacant	454
6	470200006516500	Vacant	109
7	470200002004200	Vacant	733
8	470200001510950	Vacant	638
9	470200005012900	Vacant	518
10	470200001007501	Vacant	1044
11	470200001007700	Vacant	1002
12	470200002519932	Vacant	1634
13	470200002519950	Vacant	2395
14	470200005004350	Vacant	506
15	470200005001100	Vacant	507
16	470200002510600	Vacant	1117
17	470200003001302	Vacant	323
18	470200001501450	Vacant	3207
19	470200002519700	Residential	3606
20	470200005507200	Farm	16230
21	470200005516605	Farm	7056
22	470200006510600	Brownfield site	1910

C.4: Key Assumptions for deriving number of units on vacant residential lands

.

Vacant Lands

Total area	58
Gross - Net Ratio	55%
Net Residential Area	32

AREA SHARE

Low Density	50%
Medium Density	30%
High Density	20%

Density	Area	Density	Units on Vacant Lands
Low [1]	15.95	25	399
Medium [2]	9.57	40	383
High [3]	6.38	100	638
Total	31.9		1420

[1] Includes singles and semi-detached units.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Data as of February 2022 from Town of Arnprior by Watson & Associates Economists Ltd., 2022.

Appendix D
Growth Projections Approach/Methodology

Appendix D: Growth Projection Approach/Methodology

Approach and Methodology

The population, household and employment forecast methodology adopted for this study utilizes a combined forecasting approach, which incorporates both the traditional "top – down" population forecast methodology (i.e. population by age-cohort) and a "bottom-up" household formation methodology. This combined approach is adopted to ensure that both regional economic/demographic trends and local housing market conditions are adequately assessed in developing the Town's long-term growth potential.

D.1   Economic Base Model

Local/regional economic activities can be divided into two categories: those that are "export-based," and those that are "community-based." The export-based sector is comprised of industries (i.e. economic clusters) that produce goods that reach markets outside the community (e.g. agriculture and primary resources, manufacturing, research and development). Export-based industries also provide services to temporary and seasonal residents of the Town (hotels, restaurants, tourism-related sectors, colleges and universities) or to businesses outside the Town (specialized financial, professional, scientific and technical services). Community-based industries produce services that primarily meet the needs of the residents in the Town (retail, medical, primary and secondary education, and personal and government services). Ultimately, future population and housing growth within the Town of Arnprior has been determined in large measure by the competitiveness of the export-based economy within the Town and the surrounding market area. In developing the long-term labour force and population forecast for the Town of Arnprior, a review of key regional and local economic growth drivers was also considered. The approach is illustrated schematically in Figure D-1.
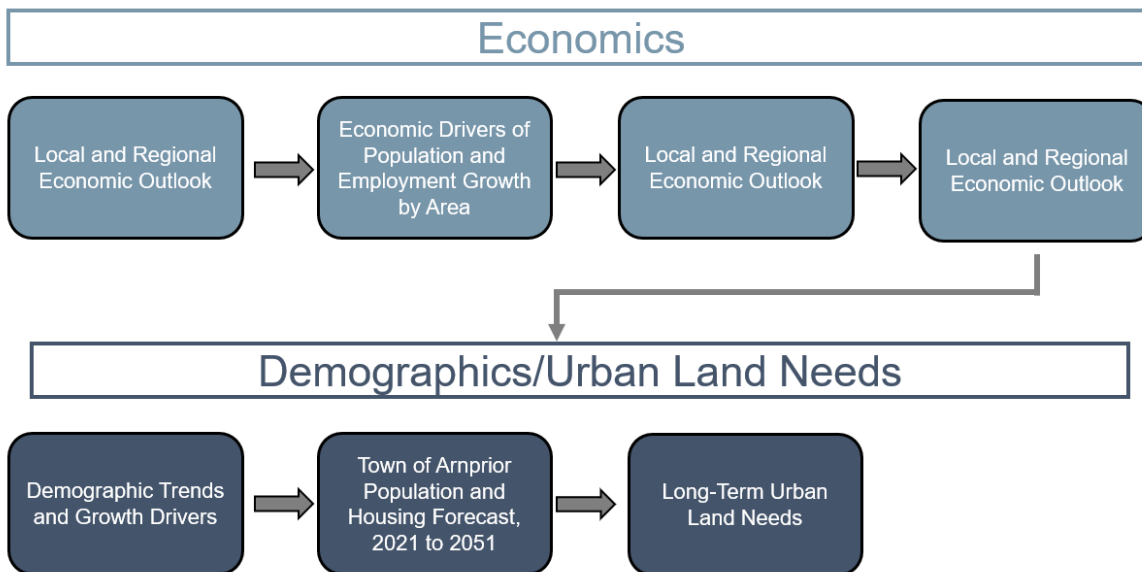
The population forecast methodology uses, as its base, population age groups and ages each group over time, taking into consideration Regional and local demographic trends, an assessment of economic growth drivers, etc.

Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy. Total housing growth is generated from the population forecast by major age group using a headship rate forecast.

A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e. cohort). Average headship rates do not tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e. 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as the Town's population ages, the ratio of household maintainers is anticipated to increase. The average headship rate represents the inverse of the average number of persons per unit (P.P.U.). As such, as the Town's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants

increases. Figure C-2 summarizes the cohort-survival forecast methodology, which is a provincially accepted approach to projecting population and corresponding total household formation. [42]

Figure D-2
Population and Household Forecast Methodology

[42] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.

This forecasting approach has been developed in accordance with the Provincial Projection Methodology Guidelines and industry best practices.[43] This approach focuses on the rate of historical housing construction in the Town of Arnprior and the surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, housing units in the development process, as well as historical housing demand. Population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in P.P.U. over time within existing households.

D.3   Forecast Households by Structure Type

Forecast households have been categorized by the following structure types:

- Low density (singles/semi-detached);
- Medium density (townhouses); and
- High density (apartments).

Forecast housing growth by structure type has been developed based on the following supply and demand factors:

Supply Factors

- Supply of potential future housing stock in the development process by housing type and approval status;
- Lag-time between housing starts and completions;
- Housing intensification opportunities;
- Current inventory of net vacant designated urban "greenfield" lands not currently in the development approvals process; and
- Provincial and local planning policy.

Demand Factors

- Historical housing activity based on building permit activity/housing completions;
- Propensity trends by structure type for the Town of Arnprior;

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[43] Projection Methodology Guidelines. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.

- Commuting trends and access to surrounding employment markets;
- Market demand for housing intensification;
- Appeal to families, empty nesters and seniors; and
- Major infrastructure improvements and expansions.

D.4 Employment Forecast

The long-term employment growth potential for the Town of Arnprior has been developed from the labour force growth forecast, which considers both the rate and age structure of forecast labour force growth over the 2021 to 2051 planning horizon. A long-term employment growth forecast by major employment sector/ category (i.e. primary, industrial, commercial, institutional, work at home) was then established using the employment "activity rate" method.[44]

When forecasting long-term employment, it is important to understand how growth in the Town's major employment categories (i.e. industrial, commercial and institutional) is impacted by forecast labour force and population growth. Population-related employment (i.e. retail, schools, service and commercial) is generally automatically attracted to locations convenient to residents. Typically, as the population grows, the demand for population-related employment also increases to service the needs of the local community. Forecast commercial and institutional activity rates have been based on historical activity rates and employment trends, as well as future commercial and institutional employment prospects within a local and regional context. Similar to population-related employment, home-based employment is also anticipated to generally increase in proportion to population growth.[45]

Industrial and office commercial employment (export-based employment), on the other hand, is not closely linked to population growth and tends to be more influenced by broader market conditions (i.e. economic competitiveness, transportation access, access to labour, and distance to employment markets), as well as local site characteristics, such as servicing capacity, highway access and exposure, site size/ configuration, physical conditions and site location within existing and future

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[44] An employment activity rate is defined as the number of jobs in a Town divided by the number of residents.
[45] Due to further advancements in telecommunications technology, it is anticipated that home-based employment activity rates may increase over the forecast period for the Town.

Employment Areas throughout the Town and the surrounding market area. As such, industrial employment (employment lands employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

- Macro-economic trends influencing employment lands development (i.e. industrial and office employment) within the Town of Arnprior and the surrounding market area);
- Historical employment trends (i.e. review of established and emerging employment clusters), non-residential construction activity and recent employment land absorption rates;
- Availability of serviced employment land supply (i.e. shovel-ready employment land) and future planned greenfield development opportunities on vacant designated employment lands within the Town of Arnprior and the surrounding market area;
- Recent land sales of municipally-owned and privately-owned industrial lands within the Town of Arnprior and the surrounding market area; and

Appendix E
Supplementary Growth Information

Appendix E: Details of Growth Forecast

E.1 Residential Growth Forecast (Medium Scenario)

Table E-1
Town of Arnprior
Residential Growth Forecast Summary

	Year	Population (Including Census Undercount)[1]	Housing Units				Person Per Unit (P.P.U.)
			Singles & Semi-Detached	Multiple Dwellings[2]	Apartments[3]	Total Households	
Historical	2006	7,340	1,970	270	880	3,120	2.35
	2011	8,320	2,283	313	1,019	3,615	2.30
	2016	9,010	2,465	490	935	3,890	2.32
	2021	9,900	2,700	619	971	4,290	2.31
Forecast	2026	10,700	2,924	750	1,049	4,723	2.27
	2031	11,500	3,118	865	1,146	5,129	2.24
	2036	12,300	3,308	974	1,262	5,544	2.22
	2041	13,100	3,496	1,076	1,392	5,964	2.20
	2046	13,900	3,683	1,171	1,538	6,392	2.17
	2051	14,700	3,865	1,264	1,699	6,828	2.15
Incremental	2006 - 2011	980	313	43	139	495	
	2011 - 2016	690	182	177	-84	275	
	2016 - 2021	890	235	129	36	400	
	2021 - 2026	800	224	131	78	433	
	2021 - 2031	1,600	418	246	175	839	
	2021 - 2036	2,400	608	355	291	1,254	
	2021 - 2041	3,200	796	457	421	1,674	
	2021 - 2046	4,000	983	552	567	2,102	
	2021 - 2051	4,800	1,165	645	728	2,538	

[1] Population includes net Census undercount estimated at approximately 2.5%.
[2] Includes singles and semi-detached units.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Note: Figures may not add due to rounding.
Source: Historical 2001 to 2016 derived from Statistics Canada Census profiles. Forecast prepared by Watson & Associates Economists Ltd., 2022.

Table E-2
Town of Arnprior
Employment Growth Forecast Summary

Period	Population	Activity Rate								Employment							
		Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W.[1]	Total Including N.F.P.O.W.	Primary	Work at Home	Industrial	Commercial/Population Related	Institutional	Total	No Fixed Place of Work	Total Employment (Including N.F.P.O.W.)
Mid-2006	7,340	0.000	0.020	0.312	0.278	0.124	0.734	0.053	0.786	0	145	2,293	2,038	910	5,385	386	5,771
Mid-2011	8,320	0.005	0.013	0.211	0.217	0.133	0.579	0.049	0.627	40	110	1,758	1,803	1,105	4,815	404	5,219
Mid-2016	9,010	0.001	0.019	0.157	0.187	0.114	0.478	0.038	0.517	10	175	1,413	1,688	1,025	4,310	345	4,655
Mid-2021	9,900	0.001	0.025	0.135	0.147	0.101	0.409	0.037	0.447	10	249	1,340	1,455	1,000	4,054	370	4,424
Mid-2026	10,700	0.001	0.027	0.133	0.146	0.099	0.406	0.039	0.445	10	293	1,421	1,557	1,059	4,340	417	4,758
Mid-2031	11,500	0.001	0.029	0.128	0.144	0.094	0.395	0.039	0.435	10	334	1,470	1,658	1,075	4,547	452	4,999
Mid-2036	12,300	0.001	0.032	0.124	0.142	0.089	0.387	0.040	0.427	10	394	1,519	1,743	1,100	4,765	487	5,252
Mid-2041	13,100	0.001	0.036	0.120	0.139	0.086	0.382	0.040	0.423	10	474	1,577	1,823	1,125	5,009	529	5,539
Mid-2046	13,900	0.001	0.039	0.117	0.135	0.083	0.375	0.041	0.415	10	538	1,628	1,883	1,150	5,208	563	5,771
Mid-2051	14,700	0.001	0.042	0.114	0.132	0.080	0.370	0.041	0.411	10	617	1,676	1,947	1,182	5,432	603	6,035
Incremental Change																	
Mid-2006 - Mid-2011	980	0.0048	-0.0065	-0.1011	-0.0609	0.0088	-0.1549	-0.0040	-0.1589	40	-35	-535	-235	195	-570	18	-552
Mid-2011 - Mid-2016	690	-0.0037	0.0062	-0.0545	-0.0294	-0.0191	-0.1004	-0.0103	-0.1107	-30	65	-345	-115	-80	-505	-59	-564
Mid-2016 - Mid-2021	890	-0.0001	0.0057	-0.0214	-0.0403	-0.0128	-0.0689	-0.0009	-0.0698	0	74	-73	-233	-25	-256	25	-231
Mid-2021 - Mid-2026	800	0.000	0.002	-0.003	-0.001	-0.002	-0.004	0.0016	-0.0022	0	44	81	102	59	286	47	334
Mid-2021 - Mid-2031	1,600	0.000	0.004	-0.008	-0.003	-0.008	-0.014	0.0019	-0.0122	0	85	130	203	75	493	82	575
Mid-2021 - Mid-2036	2,400	0.000	0.007	-0.012	-0.005	-0.012	-0.022	0.0022	-0.0199	0	145	179	288	100	711	117	828
Mid-2021 - Mid-2041	3,200	0.000	0.011	-0.015	-0.008	-0.015	-0.027	0.0030	-0.0241	0	225	237	368	125	955	159	1,115
Mid-2021 - Mid-2046	4,000	0.000	0.014	-0.018	-0.011	-0.018	-0.035	0.0031	-0.0317	0	289	288	428	150	1,154	193	1,347
Mid-2021 - Mid-2051	4,800	0.000	0.017	-0.021	-0.015	-0.021	-0.040	0.0036	-0.0363	0	368	336	492	182	1,378	233	1,611
Annual Average																	
Mid-2006 - Mid-2011	196	0.001	-0.001	-0.020	-0.012	0.002	-0.031	-0.001	-0.032	8	-7	-107	-47	39	-114	4	-110
Mid-2011 - Mid-2016	138	-0.001	0.001	-0.011	-0.006	-0.004	-0.020	-0.002	-0.022	-6	13	-69	-23	-16	-101	-12	-113
Mid-2016 - Mid-2021	178	0.000	0.001	-0.004	-0.008	-0.003	-0.014	0.000	-0.014	0	15	-15	-47	-5	-51	5	-46
Mid-2021 - Mid-2026	160	0.000	0.000	-0.001	0.000	0.000	-0.001	0.000	0.000	0	9	16	20	12	57	9	67
Mid-2021 - Mid-2031	160	0.000	0.000	-0.001	0.000	-0.001	-0.001	0.000	-0.001	0	8	13	20	8	49	8	57
Mid-2021 - Mid-2036	160	0.000	0.000	-0.001	0.000	-0.001	-0.001	0.000	-0.001	0	10	12	19	7	47	8	55
Mid-2021 - Mid-2041	160	0.000	0.001	-0.001	0.000	-0.001	-0.001	0.000	-0.001	0	11	12	18	6	48	8	56
Mid-2021 - Mid-2046	160	0.000	0.001	-0.001	0.000	-0.001	-0.001	0.000	-0.001	0	12	12	17	6	46	8	54
Mid-2021 - Mid-2051	192	0.000	0.001	-0.001	-0.001	-0.001	-0.002	0.000	-0.001	0	15	13	20	7	55	9	64

[1] Statistics Canada defines employees with no fixed place of work as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Source: Watson & Associates Economists Ltd., 2022