



the town of
**Conception
Bay South**

Bright town. Bright future.

PlanCBS

Municipal Plan Review

BACKGROUND ANALYSIS

2022.05.06

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INTRODUCTION

The Town of Conception Bay South (CBS) is currently in the process of reviewing its Municipal Plan and Development Regulations. The Plan and Regulations guide how and where development happens in the town.

This background report discusses the context of the town, with the intent of laying the foundation for future planning. The report includes an analysis of the natural environment and the effects of ongoing climate change; demographic characteristics and population trends that will affect the community's growth; infrastructure and services such as sewer and water; housing conditions and demand; the local economy; land use and development trends; and other issues like heritage planning and agricultural land. This comprehensive study of local conditions will help to develop policies and regulations that will best fit the community and prepare CBS for future change.

A Note on Statistics

At the time of writing this report, only partial Statistics Canada data for the 2021 Census has been released (total population and demographic profile), meaning the bulk of analysis has been completed using the 2016 Statistics Canada Census, which is now substantially out-of-date. In particular, the last two years of the COVID-19 global pandemic have resulted in a major shift in settlement patterns and the cost of housing across the Island, and this trend is expected to be no different in CBS. The project team will be conducting a survey of residents to help develop a clearer understanding of how the changes of the past two years have affected the community.

A Note on Mapping

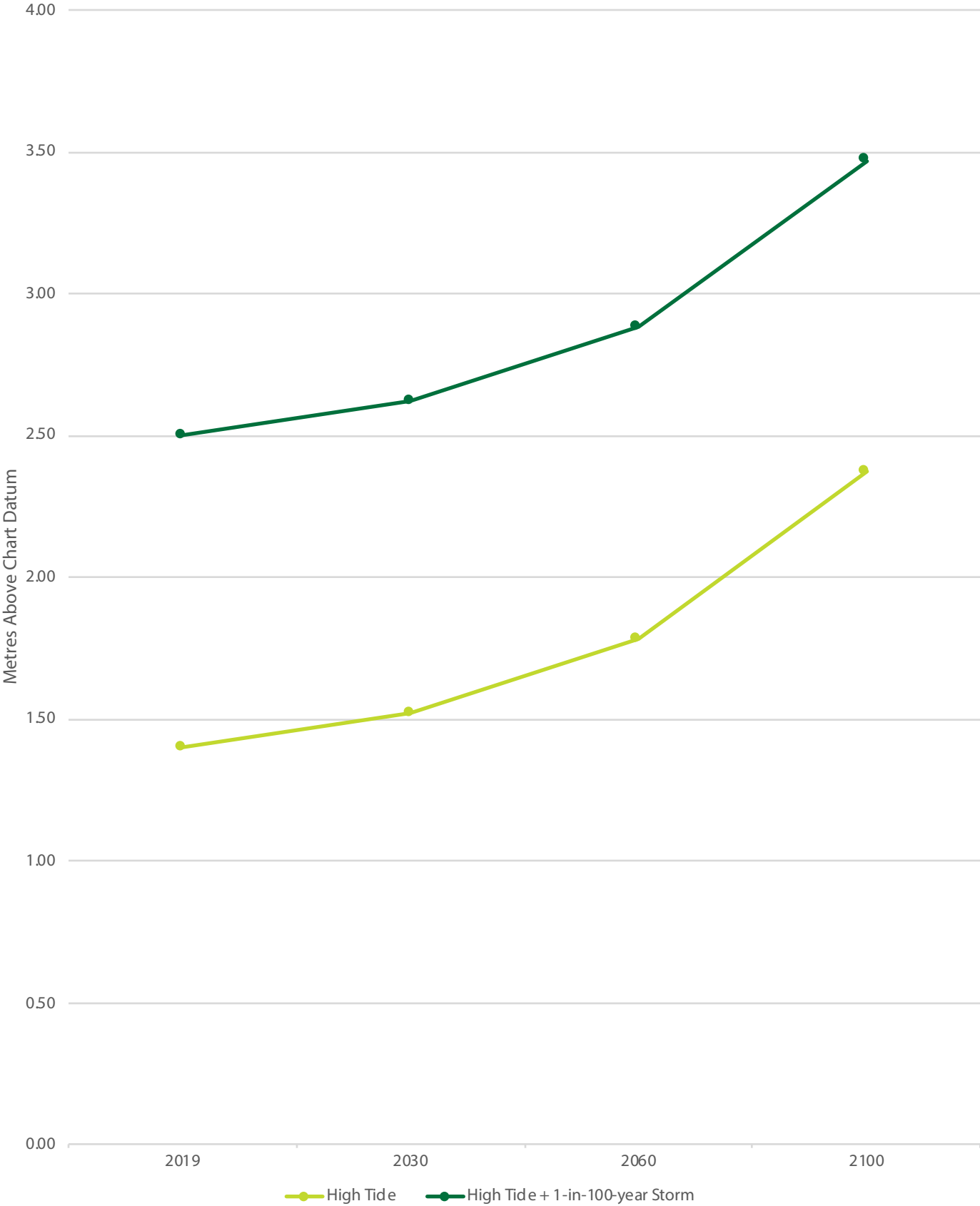
Many of the maps in this report are based on Statistics Canada Dissemination Areas ("DA"). These are standard geographic areas defined by Statistics Canada, intended to capture roughly equal populations (between 400 and 700 people). Because of the way Dissemination Areas are defined, areas with low population densities result in a large (by area) DA. When viewing maps based on DA, this can result in misinterpretation of results being presented. In CBS, this happens especially in areas south of Peacekeepers Way, where large areas of undeveloped land result in low average population densities, which result in large DAs. This puts a greater visual emphasis on any data presented in these areas. For example, a quick glance at the map on page 34 (Median Housing Value) may give the impression that a large proportion of houses in CBS are valued at more than \$300k. However, it is important to remember that there are very few houses south of Peacekeepers Way within that large area identified as having a median housing value between \$300k and \$340k.



ENVIRONMENT

The natural environment shapes not only the geography of our communities but also our sense of place. The environment provides us with essential amenities such as drinking water, crops, natural resources and shelter, and dictates how our communities change with time. The effects of climate change will result in more frequent and intense storms, flooding, and erosion. In order to be proactive about these shifts and our role in them, we will need to adapt our buildings and infrastructure and be thoughtful about how we make future investments in our built environment. Identifying geological hazard areas will guide development and help us to understand potential risks. Our stewardship of this environment will determine the future health of both our Earth and our communities.

Sea Level Rise



CLIMATE CHANGE + SEA LEVEL RISE

Planning in the context of climate change requires that CBS be proactive in its plan for future development, infrastructure, and vital community services. Climate change impacts in Atlantic Canada will include more frequent storm events, increased storm intensity, sea level rise, higher storm surges, and more coastal erosion and flooding. This will affect coastal communities like CBS and their infrastructure and industries. The quality of drinking water resources may also come under pressure with these conditions.

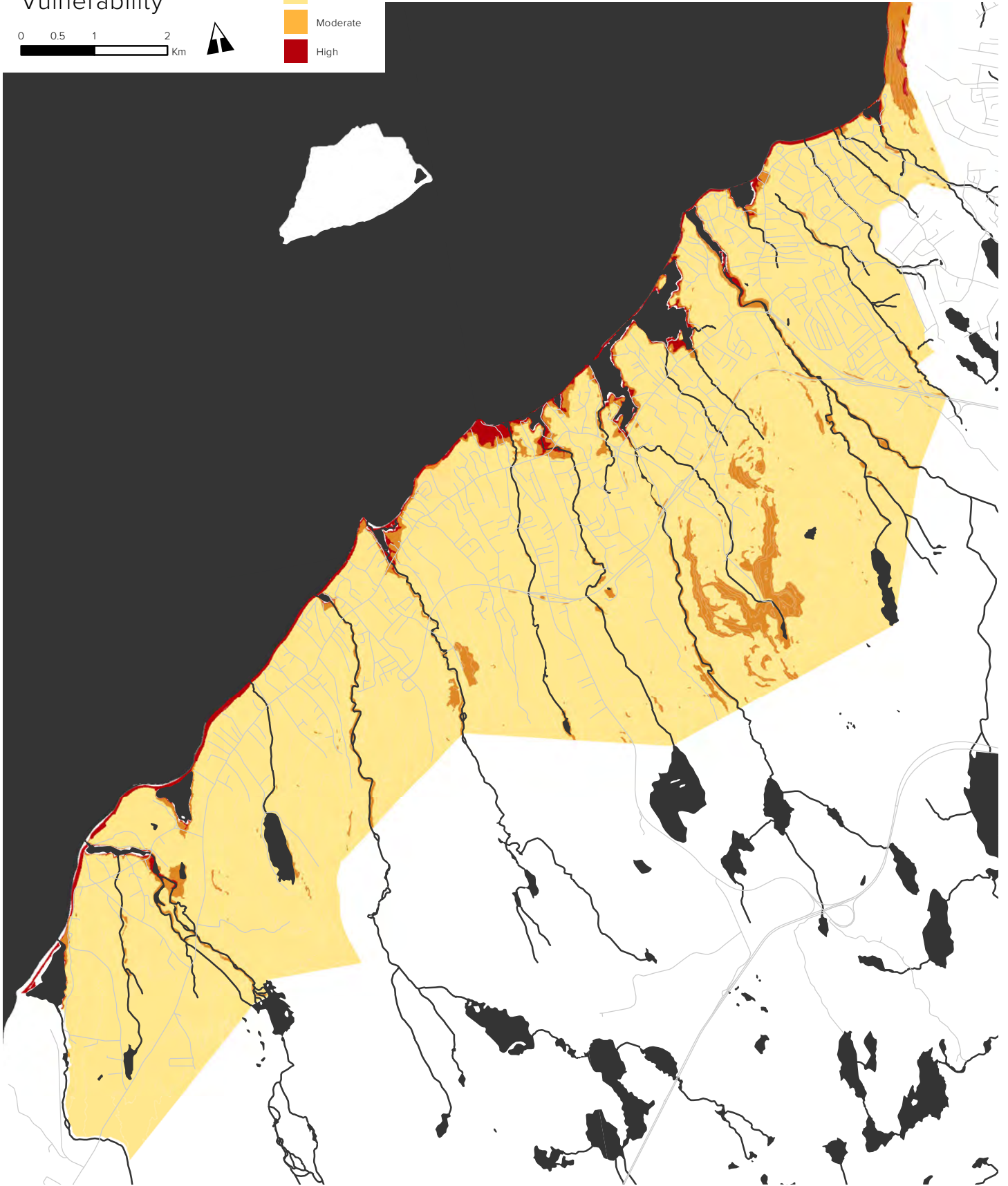
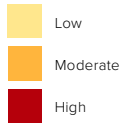
Due to its linear development pattern, much of the infrastructure in CBS is located along the coast and will require significant measures to protect property and adequately manage impacts such as storm surges and increased stormwater flows.

Each year the sea level rises approximately 3-5 millimetres and it is anticipated to rise by 1 metre or more by 2100. One area where this creates particular concern is the Long Pond barachois, which was significantly damaged during a storm surge event during the winter of 2020. This natural feature protects low-lying areas, including the commercial areas in Main Street, from storm surge events. Future sea level rise and storm surges have the potential to breach this system and leave the core of CBS vulnerable.

The chart at left visualizes sea level rise forecasts up to the year 2100. This scenario is based on the Intergovernmental Panel on Climate Change (IPCC) scenario RCP 8.5, which is considered to the worst-case scenario, in which little is done to reduce human contributions to climate change. As a result of these projections, required maintenance intervals for coastal infrastructure are expected to shorten, as the probability of flooding is likely to increase. Future growth of CBS should evaluate options for mitigation strategies and accommodate for sea-level rise projections.

Hazard Vulnerability

0 0.5 1 2 Km



GEOLOGICAL HAZARDS

This map visualizes environmental hazards as identified by a 2011 report* from Newfoundland and Labrador Natural Resources. The analysis procedure involved the identification of areas of low slope adjacent to streams; areas 4 metres above sea level or lower; and steep slopes or sites of historical landslides, avalanches, rockfall or flooding. These data were combined with surficial geology and then weighted to identify relative risk. This approach is based on a number of assumptions; it serves to highlight areas where there could be higher risks, rather than specifically identifying hazards. In 2017 the Town conducted a study on policy related to flood risk management; however, data quality issues prevented completion of the project. New LiDAR analysis (high-resolution elevation mapping) has since been conducted for the Town, but completion of the study is still pending.

Looking at the map, moderate-risk classifications are seen inland, comprised of several low slope areas adjacent to streams. These areas surround Minerals and Anchorage Roads and Angler Place. Homes along these streets are mostly set back from the moderate-risk areas, providing a slight barrier from any flooding or mass movement.

The coastline of CBS has the highest vulnerability to geological hazards and is comprised mainly of gravel beaches separated from the ocean by sand/gravel bars. Salt water may enter these areas during seasonal changes or storm events, putting even the larger beaches at risk. The cliffs of Topsail Bluff are composed of bedrock, making them less prone to erosion and landslides.

The report recommends a minimum setback between most forms of development and the coast of 15 metres. Development setbacks should be enforced along the coast, but the main areas of concern include Long Pond, Butlers Pond, and the land surrounding the Harbour Authorities in Long Pond and Foxtrap. Residential development directly facing the water is at particular risk in these regions, as well as areas where a road crosses a pond. Flooding even on a small portion of a road can in some cases block the only road out of a subdivision.

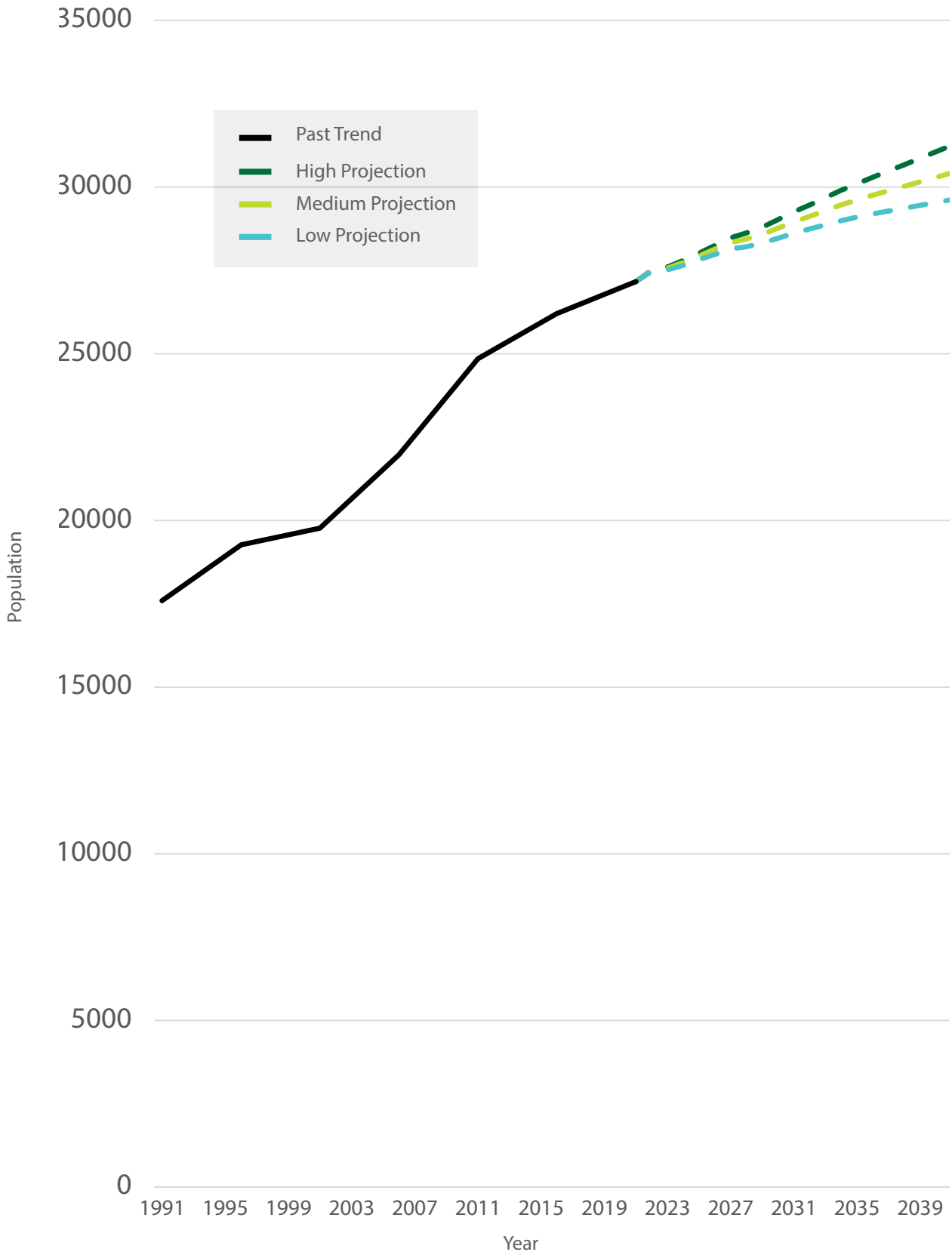
**Report on Vulnerability to Geological Hazards in the Town of Conception Bay South*



DEMOGRAPHICS

Community needs are driven by the people who live here. Understanding the changing population of CBS through projections, shifting age profiles, and the distribution of residents helps lay the groundwork for growth planning. By understanding the socioeconomic characteristics of our community we are able to plan homes and amenities that cater to all residents, and fill any gaps that may currently exist. Demographic trends influence demand for housing, recreation and commercial services as well as infrastructure requirements, and examining this relationship is one of the first steps in planning for existing and future households.

Population Projections



POPULATION GROWTH

The Newfoundland and Labrador Department of Finance generates population projections using Census Metropolitan Areas (CMAs). Their most recent data was generated in 2022. These projections use a variety of assumptions about fertility rates (births), mortality rates (deaths), and migration to develop different population scenarios out to the year 2041.

We have completed a constant-share analysis of the St. John's CMA (which comprises 13 communities including St. John's, Mount Pearl and the entirety of CBS) to generate custom projections for CBS. This approach assumes that CBS continues to make up the same proportion of the regional population as it did in 2022 (12.8% of the total St. John's CMA population). We explored other projection methods (*e.g.* growth share and shift share) and determined the constant-share method best matched with available data.

These projections are prepared based on a number of scenarios, and we have examined high, medium and low growth scenarios. Each of these scenarios result in similar outcomes for CBS, which is steady growth. Looking at these projections, the Town could grow from 27,168 residents in 2021 to anywhere from 29,617 to 31,256 in 2041.

Population projections are useful for predicting potential development scenarios, but they also depend on past population trends and can vary depending on the projection method, so these numbers are not a certain picture of the future. Instead, they are best thought of as a tool to determine the scope of policy actions that should be taken.

Proportion of the population by 5-year age cohort

2006

Age 85+

Age 40 - 44

Age 0 - 5



Median Age
38.3

2021

Age 85+

Age 40 - 44

Age 0 - 5



Median Age
43.2

Male

Female

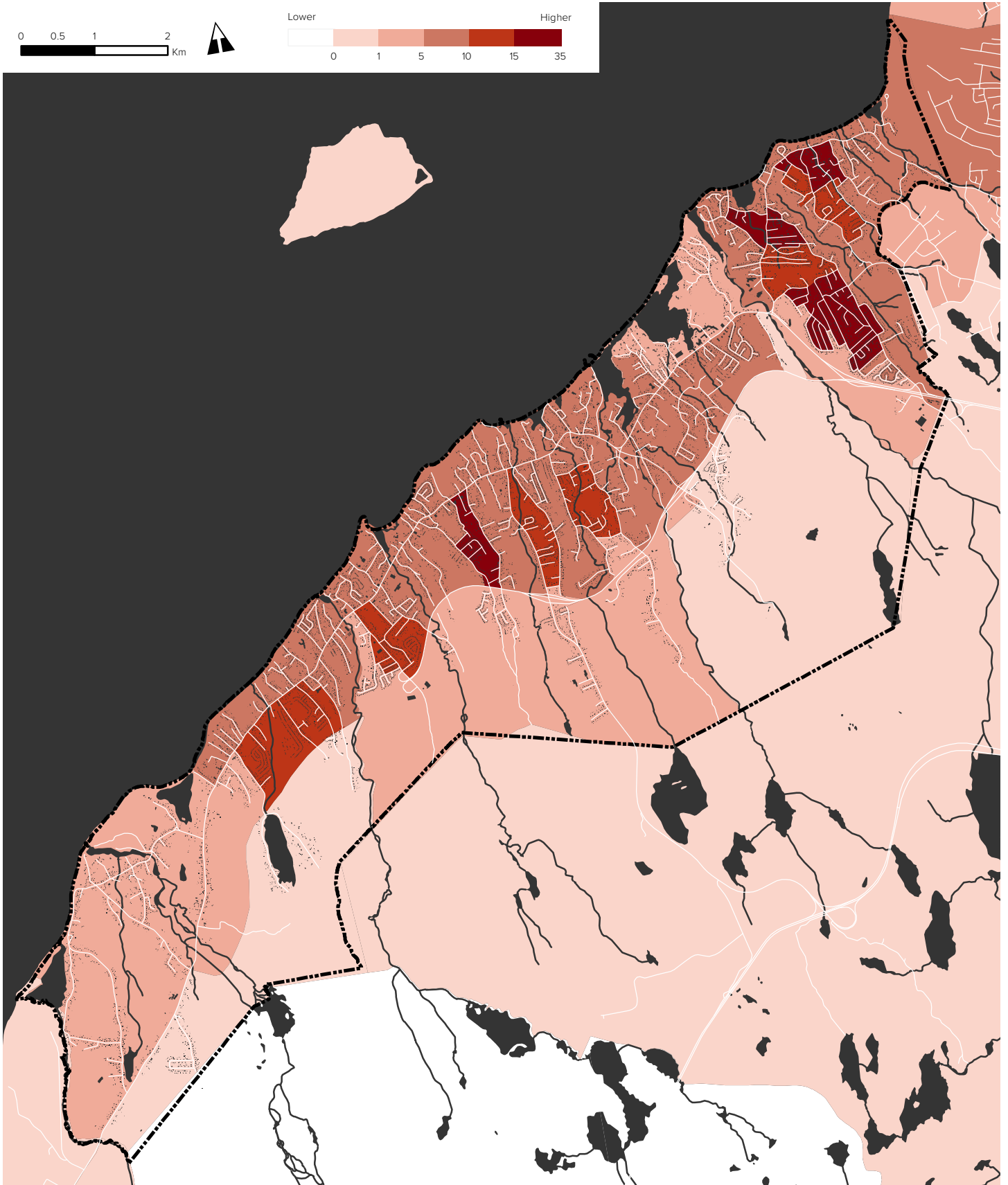
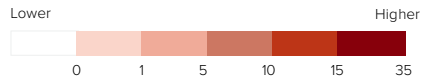
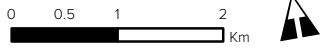
AGE PROFILE

CBS's population has aged since 2006, with a median age increase of almost five years (38.3 years to 43.2). In 2021, 17.5% of residents were 65 years of age or older, up from 9.5% in 2006. Youth under 20 make up 22.1% of the population, down from 25.3% in 2006. However, unlike much of Atlantic Canada this average aging of the population is not the result of a loss in young people, but a growth in the number of older people. In other words, the number of young residents in 2021 was roughly the same as in 2006, while the population aged 40+ has grown in those 15 years.

An aging population has implications for housing and amenity needs, and many seniors may wish to move locations, downsize, or switch into the rental market. This housing shift often comes with a need for healthcare and services within walking distance. These decisions for seniors can be based on many factors including preference, financial need, health and mobility limitations and proximity to friends and family.

Population Density

People per Hectare
(by census dissemination area)



POPULATION DISTRIBUTION

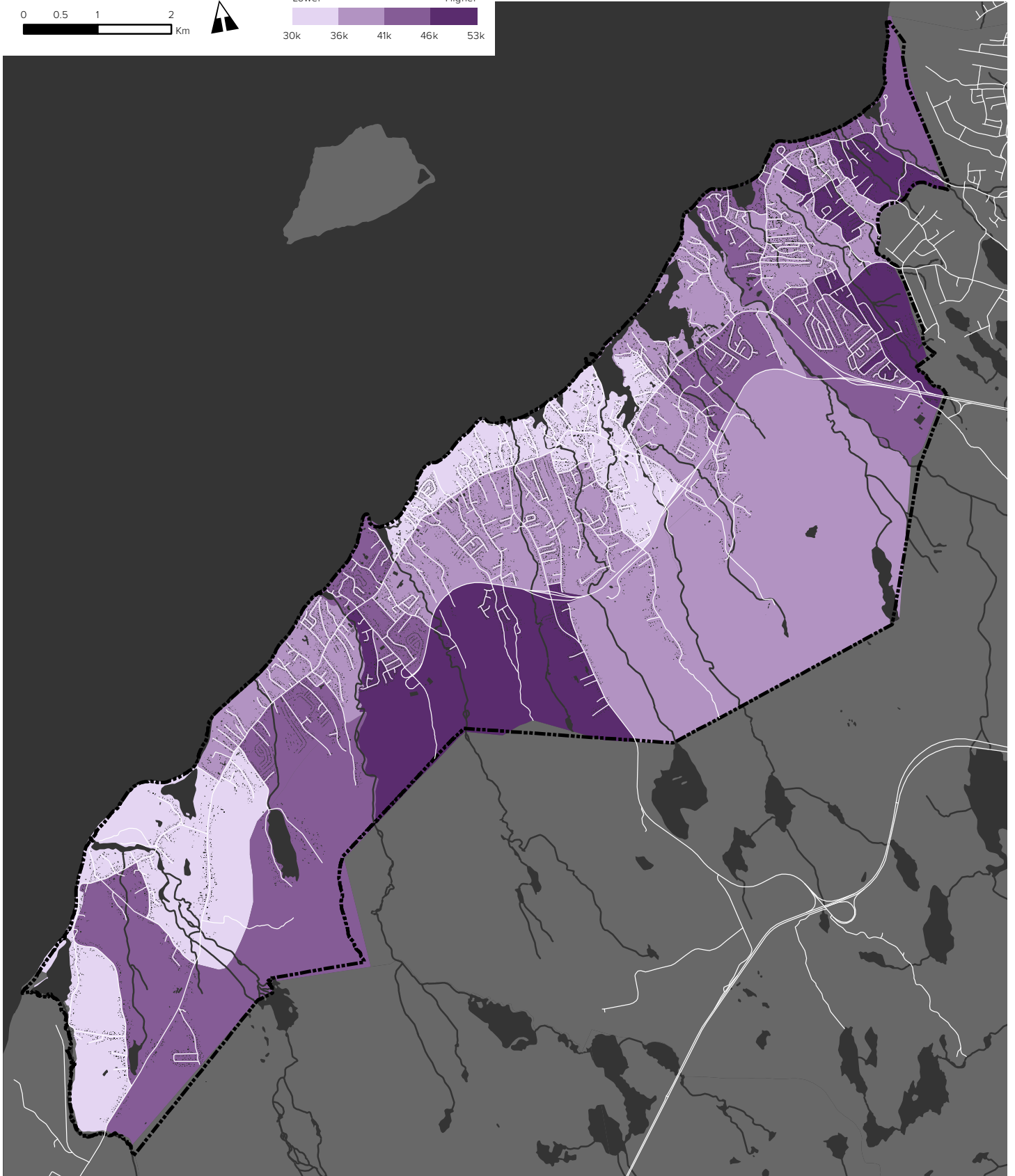
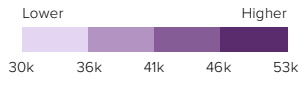
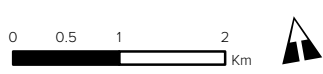
CBS is home to over 27,000 residents, according to Statistics Canada, or a density of 460 people per square kilometre (4.6 people per hectare). However, they are not spread evenly throughout the town. This density map illustrates the distribution of the population by census Dissemination Areas using 2016 census data, with darker areas having a higher concentration of residents per hectare. Grey dots represent civic addresses (homes and businesses), demonstrating the way residences have clustered around major roads and waterfront property.

The population of CBS is distributed throughout the nine communities within the town but is concentrated within seven major areas as illustrated in the map at left. In the western portion of the town, the densest concentrations appear between Peacekeepers Way and the Conception Bay Highway including in Upper Gullies, Kelligrews, Foxtrap and Longpond. In the northeastern portion of the town, Chamberlains and Topsail also have significant population densities compared to surrounding neighbourhoods. Most residences are located between Peacekeepers Way and the water, and the inland areas of CBS are largely undeveloped.

For comparison, Paradise has an average density of 7.7 residents per hectare, St. John's has an average density of 10.4 in its urban areas and 2.5 overall (due to very large areas of undeveloped land), and Mount Pearl is 14.4.

Income

Median Total Income
(among income recipients)



SOCIOECONOMIC PROFILE

Intersections of age, ability, race and income can affect the socioeconomic vulnerability of residents, and an equity analysis must take these demographics into consideration. In CBS, 35.1% of all households have at least one child, while 20.2% have at least one senior. About 30.1% of all households have at least one person with a disability, defined as any mental or physical disability or condition limiting daily activities.

In the 2016 census, 3.5% of CBS residents identified as Indigenous, while 1.1% identified as a visible minority (non-white, non-Indigenous), up from 0.6% in 2006. This compares to a national average of 22.3% who identified as a visible minority. The highest percentage of visible minorities in any dissemination area is still under 8%, but Kelligrews, Foxtrap, and Chamberlains have the highest concentrations.

The immigrant population has, proportionally, decreased slightly in the town, with 1.4% of residents identifying as an immigrant to Canada, compared to 1.7% in 2006. The highest total number of recent immigrants (arriving between 2011 and 2016) reside on the east side of Foxtrap, while smaller populations of recent immigrants are based in Chamberlains and Kelligrews.

Lone-parent families in CBS are most vulnerable to low-income, with 23.9% falling into this income bracket (as defined by Statistics Canada). Of non-family households, 20.9% fall within low-income brackets, while only 4.4% of couples without children and 3.6% of couples with children have low-income.

The median before-tax household income in CBS is relatively high at \$90,002 a year, compared to \$79,750 in St. John's and \$67,272 in the province. The income bracket containing the fewest households (11.1%) is under \$30,000, while 30% of households are earning over \$125,000. Seal Cove and Foxtrap have lower median incomes, while higher median incomes are dominant to the south of Kelligrews and pockets of Topsail and Chamberlains.

Examining the intersection of these socioeconomic characteristics helps identify vulnerable areas.

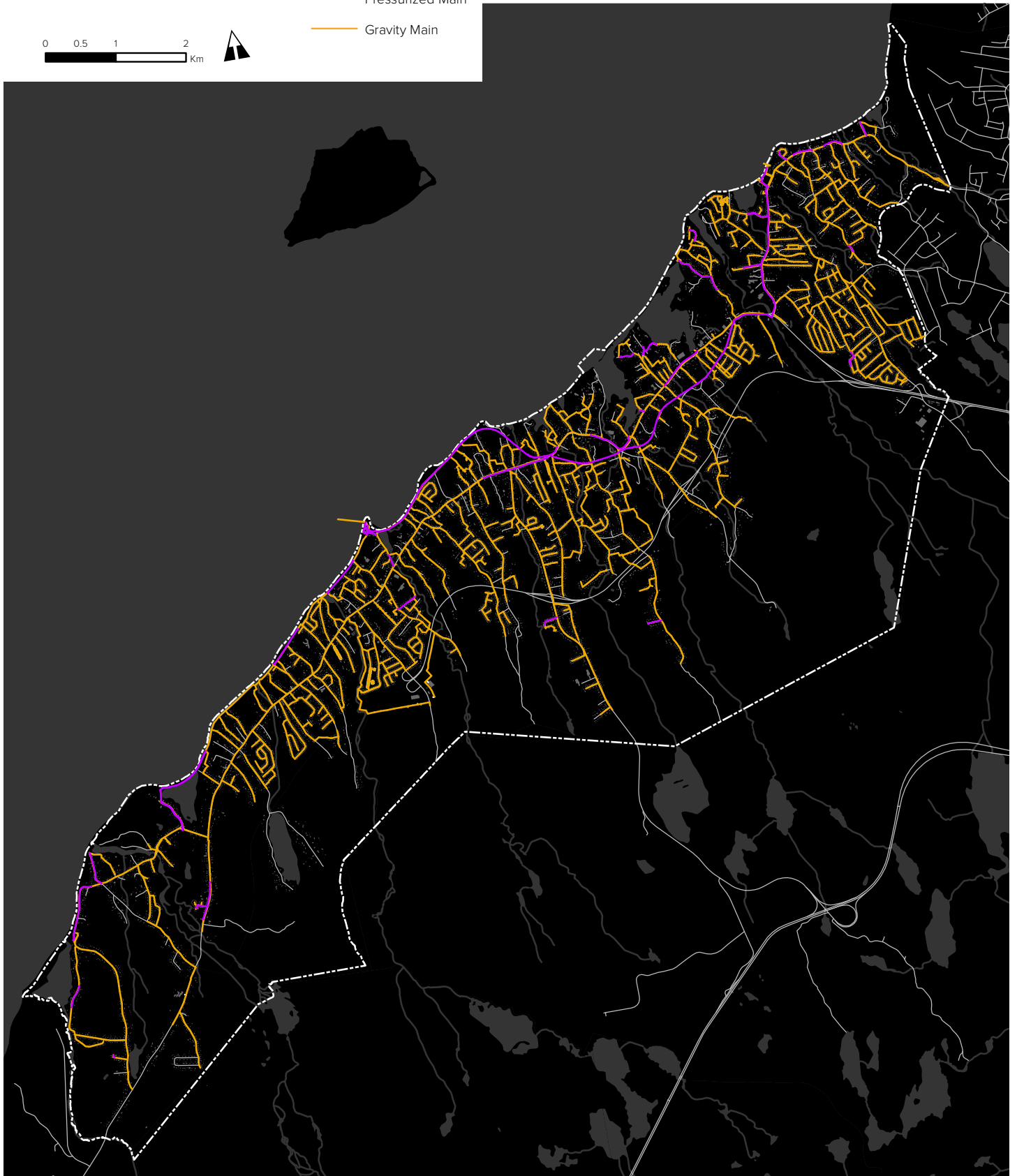
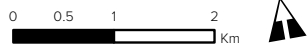


INFRASTRUCTURE + SERVICES

This analysis of infrastructure and servicing conditions includes a discussion of water and sewer, roads, sidewalks, trails and parks. Infrastructure determines both the patterns of development, as well as residents' overall quality of life. It will be important for CBS to consider where and how to invest in future infrastructure expansions and upgrades in order to realize the future residents wish to see.

Sewer System

- Pressurized Main
- Gravity Main



SEWER

Central sanitary sewer systems work by using a network of pipes to transfer waste water to a central treatment plant. The simplest and most cost-efficient systems use the force of gravity to move the waste, with a waste water treatment plant (WWTP) located at the low point of the community. However, topography sometimes requires the use of lift stations (pumps) to move waste uphill.

CBS' sanitary sewer system consists of a network of more than 200 kilometres of sewer mains and a total of 35 lift stations. Sanitary sewer for all serviced areas of CBS is collected and transmitted to the Cronin's Head Treatment Plant. More than 27 kilometres of sanitary sewer mains were constructed between 2010 and 2018. After a brief break in sewer construction activity over the last three years, the Town has plans for three sewer line projects in 2022.

East of Manuel's River, waste water is collected and pumped from Topsail along the CBS Highway to Cherry Lane where it turns and follows the T'Railway until it ties into the sanitary sewer main which runs along the T'Railway west of Fagan's Road to the Cronin's Head WWTP in Kelligrews.

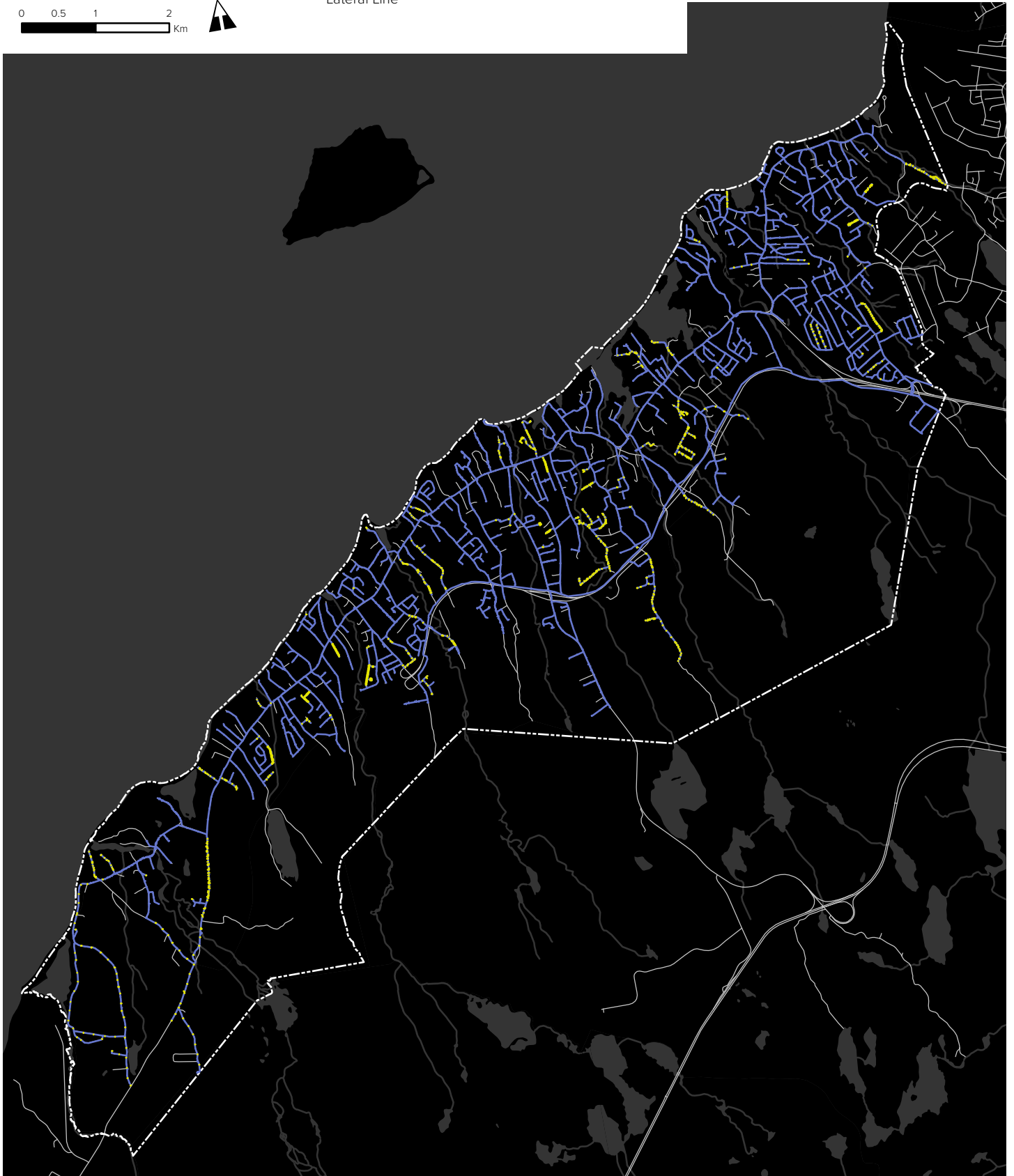
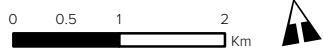
On the west side of Conception Bay South, trunk sewers on the main collector roads south of the Conception Bay Highway collect effluent, which flows north across Route 60 to the trunk sewer at the T'Railway, which feeds the Cronin's Head WWTP.

Sanitary sewage collected in Seal Cove is collected and pumped from the pump station at Lance Cove to the trunk sewer that feeds Cronin's Head from the west. This system also has pump stations located at Scott's Road North and Gully Pond Road.

In 2021 the Town completed a sanitary sewer study to build a digital model of the town's sewer system and review system capacity. This will allow the Town to make informed decisions about system upgrades in the future. The Town's WWTP will require ongoing investment in upgrades to address population growth, climate change risks, and federal wastewater treatment standards.

Water Distribution

- Main Line
- Lateral Line
- Watershed Protection Area



DRINKING WATER

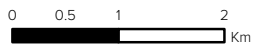
Clean drinking water is an essential component of a modern community. Development of Conception Bay South's water infrastructure began in 1976 with the construction of a water transmission main that connected the community to the Regional Water System. Since then, the water system has been continually expanded and now services almost 95% of the population. Areas that remain without servicing are located throughout the community and include individual streets set to be tied into the system, as well as areas with planned extensions services - mainly in areas south of Peacekeepers Way, which were not scheduled to be serviced over the last Municipal Planning period (2011-2021).

Drinking water is derived from outside town boundaries in the Bay Bulls Big Pond water supply by way of the Southlands reservoir. The system is gravity-fed from the Fowler's Road reservoir tanks. The Town is responsible for distribution only (not treatment) and has more than 190 kilometres of water mains with more than 30 kilometres of new water mains constructed between 2010 and 2018. After a brief break in sewer construction activity over the last three years, the Town has plans for three water line projects in 2022.

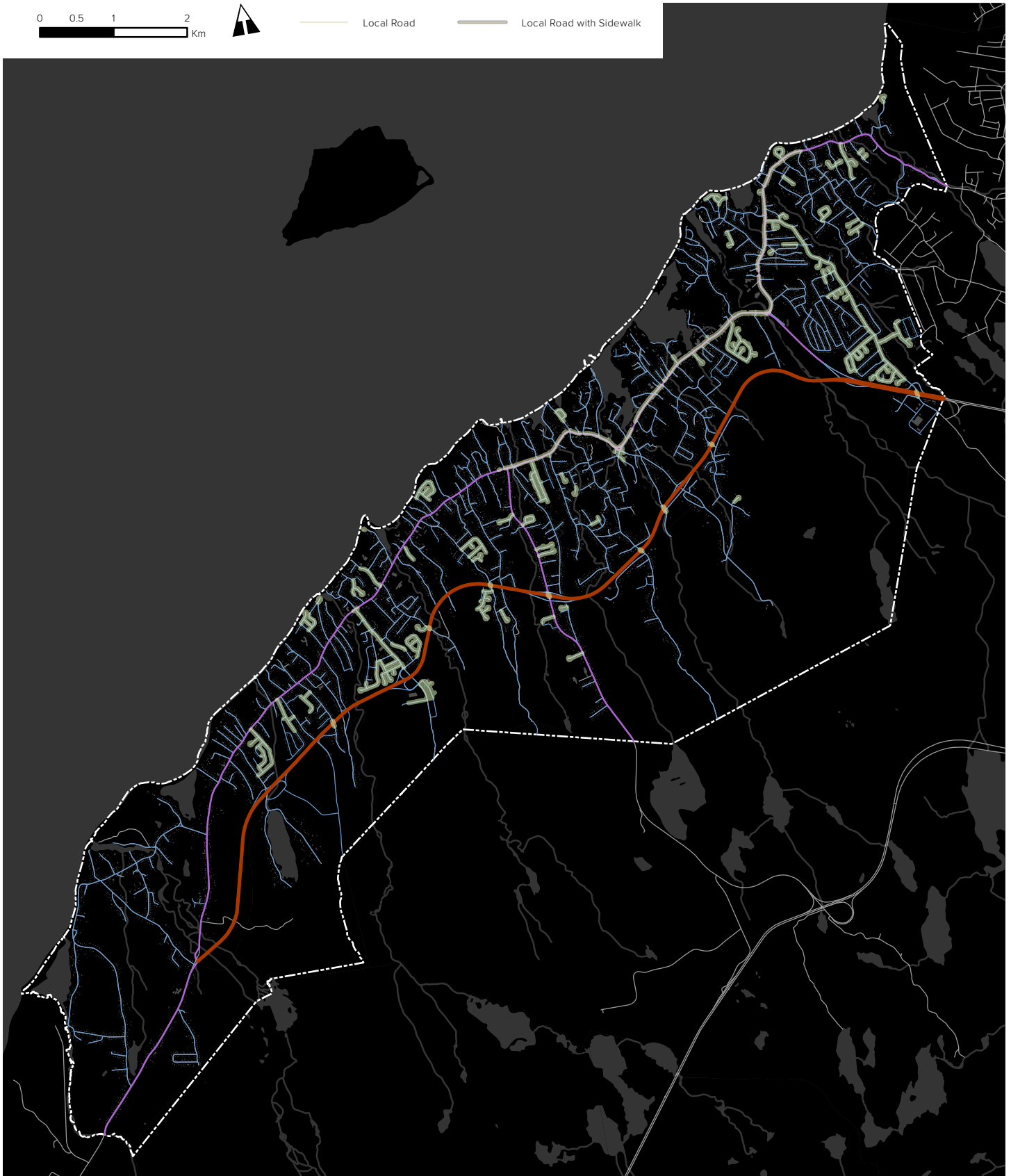
In 2016 CBCL Consulting Engineers Ltd. conducted an assessment of St. John's Regional Drinking Water System, which includes the Town's water infrastructure. This study determined that water mains from the Paradise/CBS metering chamber to the Fowler's Road Tanks are at capacity, and lays out an implementation plan to address water system needs over the next 20+ years.

A new reservoir has since been constructed in Seal Cove that was brought into service in 2019. It is intended to accommodate fire protection flows. Additional storage will be required at Fowler's Road by 2036 and frequent monitoring will be required.

Road Network



- Highway
- Arterial Road
- Local Road
- Arterial Road with Sidewalk
- Local Road with Sidewalk



ROAD NETWORK

The Town of CBS has an extensive road network, with over 225 kilometres of local and provincial roads providing important links to employment, retail, and transportation centres in the urban region. An internal network of local and collector streets provides access to residential neighbourhoods, commercial centres, and recreational facilities within the town. As CBS has grown many local streets have begun to function as collector streets.

The road network in CBS is organized along the Conception Bay Highway (Route 60) and the Peacekeepers Way (Route 2) running east-west and converging at either end of the town. In 2012 a tender was issued to upgrade and expand Route 2, with the final connection to Route 60 at the western edge of CBS completed in 2015. During this construction Route 2 was renamed to Peacekeepers Way, honouring veterans. The original name for the road was the CBS Bypass Road.

North-south collector roads offering connections between the two arterial highways include Lawrence Pond Road, Legion Road, Foxtrap Access Road (Route 61), Minerals Road, Manuels Access Road, and Fowlers Road.

The majority of the roads in CBS are owned and maintained by the Town, with the exception of Peacekeepers Way, Conception Bay Highway, Topsail Road, Manuels Access Road, and Foxtrap Access Road, which are Provincial roadways. However, municipal services follow these road networks and are under municipal jurisdiction.

The Town recently completed a three-phased Integrated Transportation Plan. The first phase provided scoping for the project, while the second phase collected data on traffic volumes, signal timing, and equipment conditions. The third phase provides a plan for future investments in the CBS road network. This includes improvements to existing designs, new roads to accommodate growth, new roads to provide connectivity among neighbourhoods, and other safety and design improvements, such as a recommended “road diet” for Route 60 (replacing four travel lanes with two travel lanes and a centre turning lane). Policy recommendations include reviewing road design standards and implementing a “roundabouts first” approach to intersection safety.



SIDEWALKS

Sidewalks are provided on only a small portion of CBS streets, with approximately 38.5 kilometres of sidewalks in the Town as of 2021. As the road network map indicates*, the majority of sidewalks provided are located in areas of new residential development, and, consequently, there is very little connectivity of sidewalks in the existing pedestrian network.

The current Municipal Plan indicates that, as funding permits, the Town will provide sidewalks on primary collector roads (Lawrence Pond Road, Legion Road, Foxtrap Access Road, and Minerals Road) and secondary collector roads (Anchorage Road, Seal Cove Road, Middle Bight Road, Red Bridge Road, Tilley's Road, and Dunns Hill Road). Additionally, the Municipal Plan indicates a need for sidewalks along the entire length of the Conception Bay Highway and Topsail Road. The Plan further recommends that sidewalks be included on all streets that provide access to the T'Railway and Manuels River. Finally, the current Municipal Plan recommends that sidewalks should be provided in all new developments, on all streets which access commercial areas and community facilities as well as within a 1.7 kilometres zone around schools.

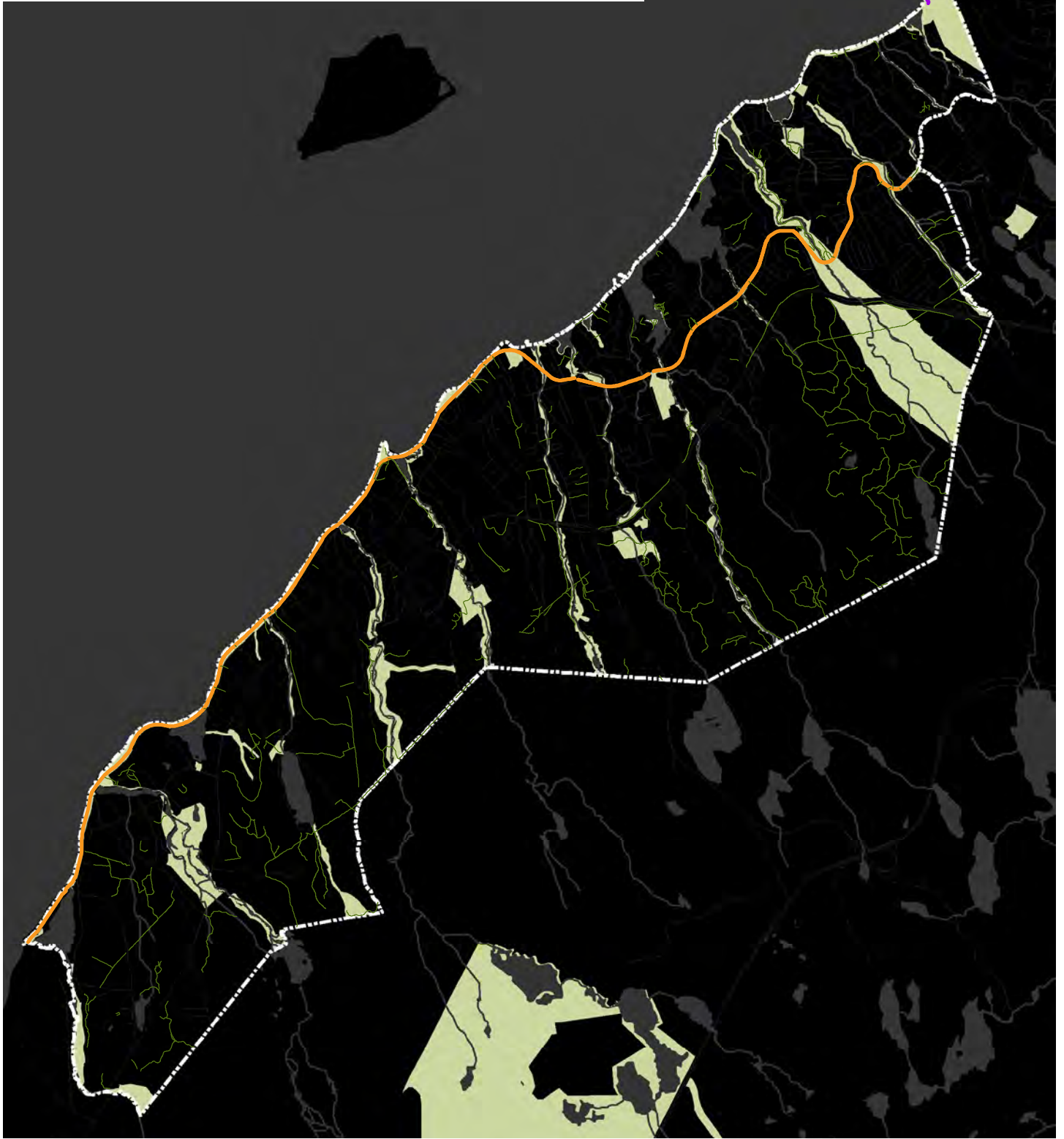
In addition to new sidewalks created when new roads are built, the Town is in the process of retrofitting sidewalks into the existing road network. In 2019, the Town invested \$1 million to upgrade the sidewalks and roads in CBS, and over the course of 2020 the Town invested a further \$550,000 in sidewalks, with a priority in school zone areas. The 2022 budget includes \$425,000 for sidewalks.

**The sidewalk inventory may not include recent construction related to subdivision development and Town-initiated capital works programs.*

Open Space and Trails



- Open Space
- Trails
- TRailway
- East Coast Trail



PARKS + TRAILS

As the town has grown, so has the demand for public recreation facilities, trails, and open space. Facilities such as the Recreation Complex, playing fields, and playgrounds have recently been upgraded and enhanced. In 2008, an Open Space and Recreation Master Plan prepared for the Town recommended a system of facilities, parks, and open spaces. This plan will be replaced by the forthcoming Recreation and Cultural Master Plan, which will focus on infrastructure and open space needs in CBS.

An important recreational asset, the T’Railway now runs 18 kilometres in CBS, primarily along the coast. Since 2013 the Town has upgraded approximately 14 kilometres of the T’Railway, making it pedestrian and cycle friendly, equipped with signs and amenities. Currently, it can be accessed through 43 streets, with five parking lots at major entrances.

Other significant pedestrian trail systems in CBS are the Manuels River Trail and Kelligrews Pond Trail. Both of these trails offer a connection to the T’Railway.

The town’s existing open space network mainly follows a north-south orientation along watersheds, while the T’Railway is the town’s major east-west corridor. A recent addition to the network is the Gateway Trail, which provides an 8km loop up Red Bridge Road, through the Gateway development, and back down along the Lower Gullies River.

Conception Bay South is also the location of the northern trailhead for the East Coast Trail. While the bulk of the trail (known as Long Shore Trail from CBS to Portugal Cove) is outside the town, the location of the trailhead at Topsail Beach provides a recreation opportunity for residents, as well as an opportunity for local businesses to serve tourists who are visiting for this well-regarded trail experience.

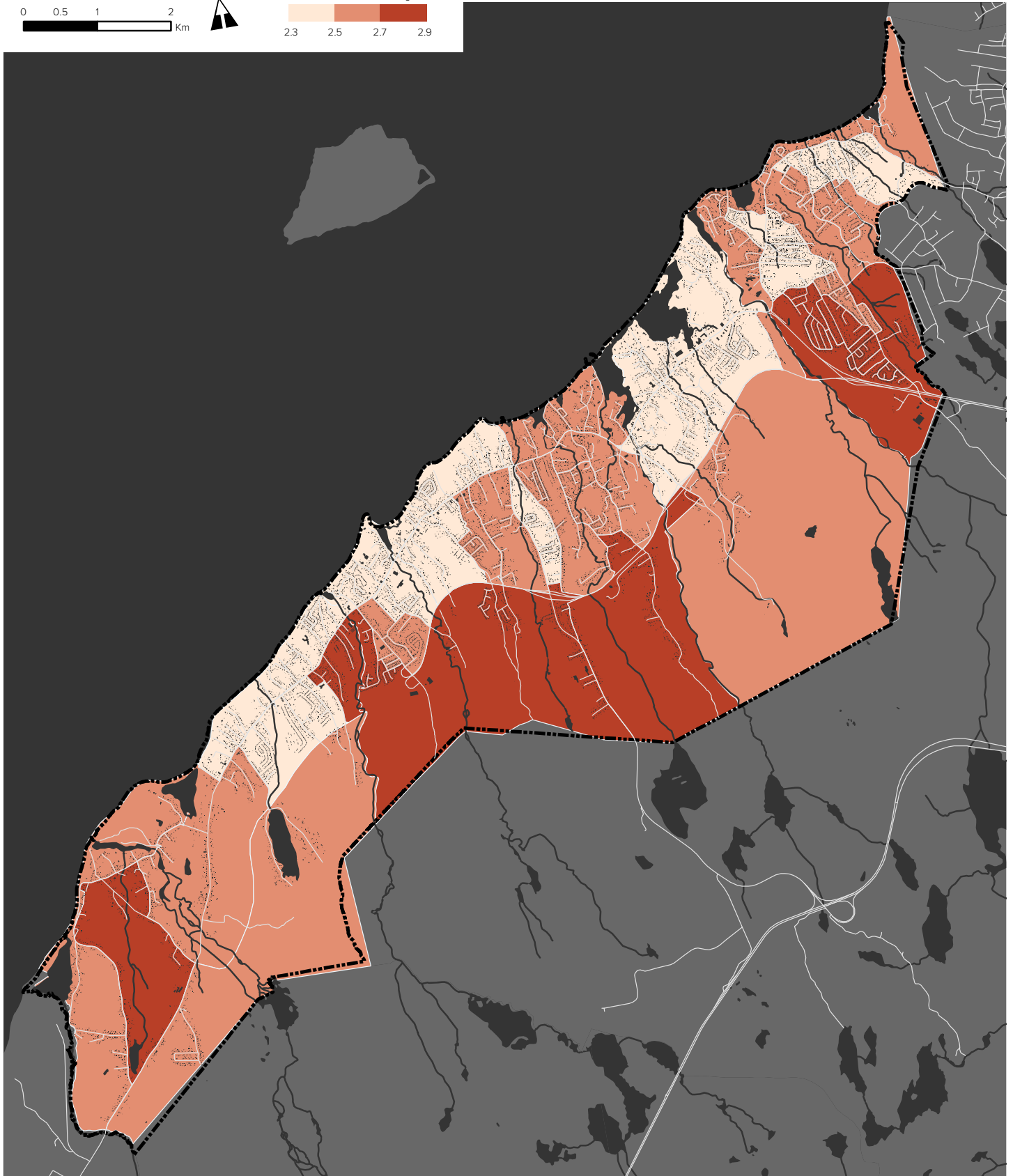
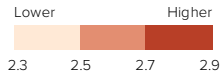
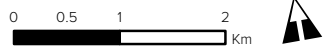


HOUSING

Every resident of Conception Bay South shares one major need in common, and that is for suitable housing which fits the requirements of their household size, physical abilities, and income. Other factors influencing housing choice include location, amenities, dwelling type, and ownership model. A diverse range of options will be necessary in order to accommodate all CBS households in suitable, sustainable and attractive housing. This analysis examines the community's existing household characteristics and housing supply.

Household Size

Average Household Size
(number of members)



HOUSEHOLDS

As of 2016, 77.9% of households in CBS were made up of one family. The largest category of households are two-person at 34.9%, while 3 and 4-person households make up a combined 46.4% of the total. Although household sizes are shrinking, single person households account for only 8.6% of households, which may reflect the town's younger population.

Most households in CBS are organized around traditional family structures, and couples with children make up the largest group of families. Of census families, couples with children make up 45.8%, followed by couples without children at 39.6%, and lone parents at 14.4%. Lone parents are an important group to highlight, as their prevalence is quite significant, and they are typically more vulnerable to housing affordability issues.

In CBS, larger households tend to be located in inland areas with higher median incomes, specifically around Seal Cove, Kelligrews and Chamberlains.

While the overall population of CBS grew from 21,966 in 2006 to 26,199 in 2016, a growth of 19%, the total number of dwellings increased at an even faster rate of 28% (from 8,248 in 2006 to 10,553 in 2016). The connected effect of this is that the average household size in CBS declined from 2.7 in 2006 to 2.6 in 2016.

This trend is not unique to CBS, and indeed household sizes have been shrinking nationally as more adults are living alone¹; families are having fewer children²; divorce rates are increasing³; and populations are aging, which has led to more couples living apart in assisted living facilities, as well as more widows and widowers. These trends point to a need for greater diversity in the housing types available throughout the community.

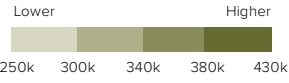
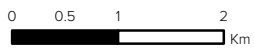
¹ <https://www150.statcan.gc.ca/n1/pub/11-630-x/11-630-x2014002-eng.htm>

² <https://www150.statcan.gc.ca/n1/daily-quotidien/190306/dq190306b-eng.htm>

³ <https://www150.statcan.gc.ca/n1/daily-quotidien/190501/dq190501b-eng.htm>

Housing Value

Median Value of Dwellings (\$)



HOUSING SUPPLY

Single-detached homes account for 77.1% of the housing stock in CBS, followed by duplexes at 19.5%. Looking at tenure, 82.6% of the town's housing stock is owner-occupied, with a median value of \$300,400, compared to \$219,228 provincially. CMHC data captures the primary rental market (*i.e.* purpose-built for rental). Only 114 of the ~1,700 rental units within CBS fall in this category. Of these, 18.4% are 1-bedrooms, 61.4% are 2-bedrooms, and 20.2% are 3+ bedrooms. Although owner-occupied homes dominate the market, the number of rental units have seen a growth rate of 307% since 1990.

The highest housing values are located in the Topsail and Chamberlains communities, as well as coastal areas in Long Pond and Kelligrews, while Foxtrap and Seal Cove tend to have lower median values and shelter costs. Average monthly shelter costs for owner housing in CBS are \$1,353, while average rental costs are \$942, about on par with St. John's housing stock but significantly above provincial averages. Almost 6% of dwellings in Conception Bay South are not occupied as primary dwellings, indicating that they are second homes or seasonal dwellings. These are concentrated mostly around the coast in Lance Cove, Kelligrews Pond, Long Pond, Lawrence Pond and Topsail.

In contrast to St. John's specifically, and Newfoundland generally, CBS has the lowest proportions of dwellings in need of major repairs, households in unsuitable housing, and households in housing poverty spending over 30% of their income on housing. These statistics likely reflect the newer housing stock of CBS.

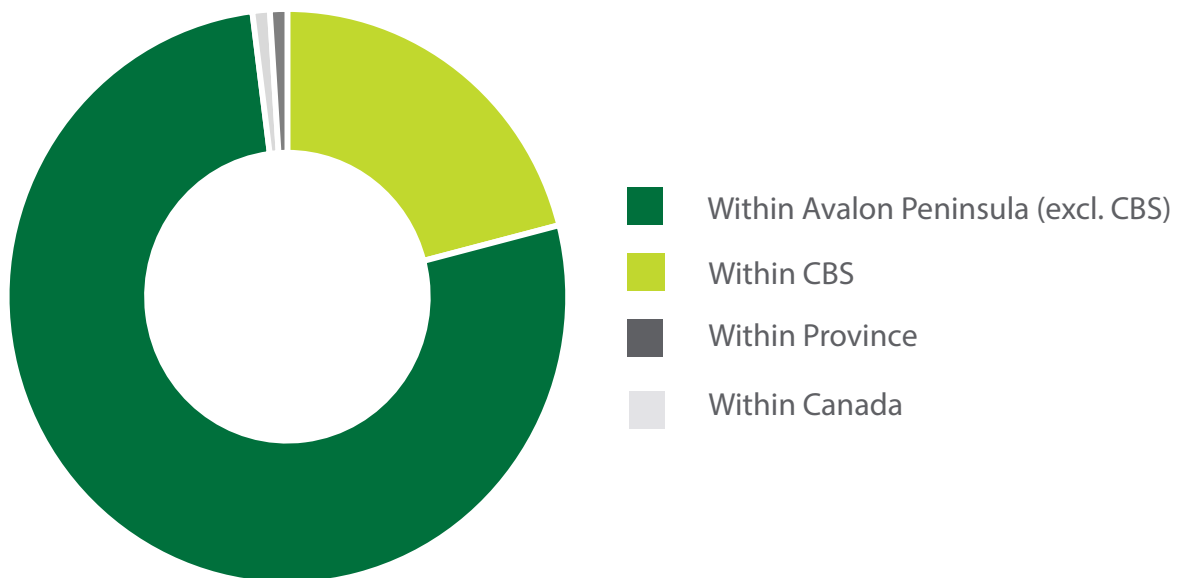
CMHC and Statistics Canada use a threshold of 30% of income to determine household affordability (*i.e.* a household spending more than 30% of its income is considered as having challenges with housing affordability). Almost 13% of CBS households living in owner-occupied housing are spending over 30% of their income on shelter, compared to 35% of renters. Of the households living in owner-occupied housing that are spending over 30% of their income of shelter, just over a third have paid off their mortgage. Households that are in housing poverty are fairly evenly dispersed, with pockets of Upper Gullies, Kelligrews, Foxtrap, Long Pond and Topsail containing 20-30% of households in housing poverty. These areas also tend to have lower median incomes, which may suggest an income gap resulting in this housing poverty.



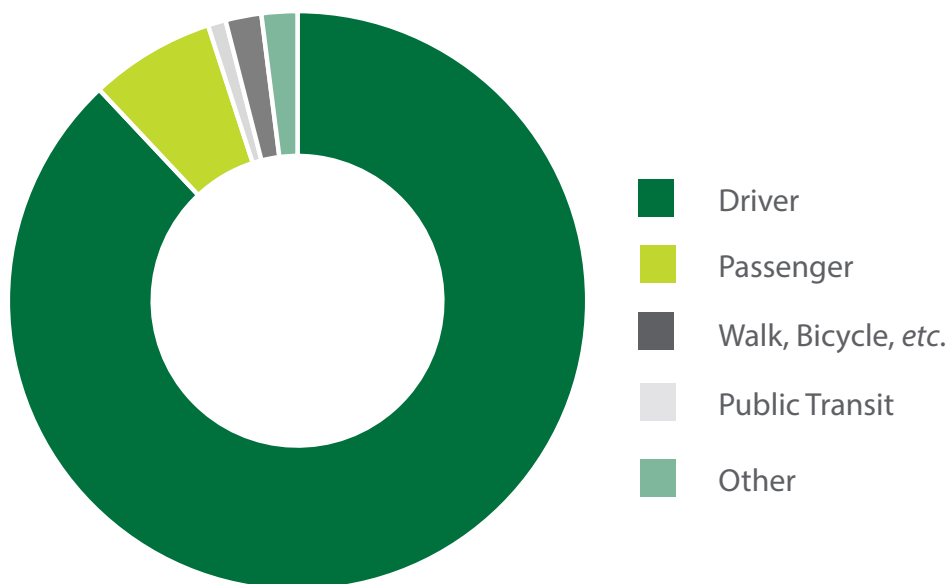
ECONOMY

Major contributors to a good quality of life include meaningful employment and amenities. The local economy determines the prosperity and sustainability of a community, and understanding how this economy functions will help us to identify tools which can shape how it evolves with time. This analysis looks at local commutes, employment within and outside CBS, as well as the local commercial and industrial businesses.

Place of Work



Commute Mode











































COMMUTING

CBS is a commuter shed for St. John's, a 20- to 30-minute drive away, and other municipalities within the Avalon Peninsula. Almost 80% of the labour force within CBS that have a usual place of employment (83% of the total labour force) work outside the town, with 77% commuting to a different municipality within the Avalon Peninsula and approximately 1% each commuting to a different county or province. The remaining 17% of the total labour force within CBS work from home (4%), work outside of Canada (<1%), or have no fixed workplace, meaning their commute likely changes depending on the day (12%).

CBS is very car reliant and 88% of commuters drive to work, while 7% drive as a passenger. Only 2% use active transportation like walking or biking, and another 1% take public transit. The remaining 2% commute using other methods of transportation than those listed. The average commute time for all modes is 23.6 minutes. Around 22% of these commutes are less than 15 minutes (for all modes), while 49% are between 15 and 30 minutes.

The nature of these commutes has a major effect on the character of the town. CBS is in some ways a bedroom community, and the proximity to other urban centres accounts for much of the town's recent growth.

| | CBS | | Newfoundland and Labrador | |
|---|--------|---|---------------------------|---|
| Total Labour Force Aged 15+ | 14,360 | | 141,865 | |
| Agriculture; forestry; fishing and hunting | 1.08% |  | 3.39% |  |
| Mining; quarrying; and oil and gas extraction | 3.66% |  | 3.81% |  |
| Utilities | 1.43% |  | 1.05% |  |
| Construction | 12.15% |  | 10.65% |  |
| Manufacturing | 5.57% |  | 6.52% |  |
| Wholesale trade | 3.59% |  | 2.20% |  |
| Retail Trade | 12.33% |  | 12.36% |  |
| Transportation and warehousing | 4.56% |  | 4.76% |  |
| Information and cultural industries | 1.81% |  | 1.44% |  |
| Finance and insurance | 2.82% |  | 2.05% |  |
| Real estate and rental and leasing | 1.11% |  | 0.98% |  |
| Professional; scientific and technical services | 4.91% |  | 4.24% |  |
| Management of companies and enterprises | 0.07% | | 0.08% | |
| Administrative and support; waste | 2.72% |  | 2.87% |  |
| Educational services | 6.65% |  | 6.93% |  |
| Health care and social assistance | 12.95% |  | 14.46% |  |
| Arts; entertainment and recreation | 1.36% |  | 1.40% |  |
| Accommodation and food services | 5.40% |  | 6.88% |  |
| Other services | 4.04% |  | 4.11% |  |
| Public administration | 10.55% |  | 7.86% |  |
| N/A | 1.36% |  | 1.97% |  |

EMPLOYMENT

CBS has grown significantly within the past few decades, and the labour force has increased by 47% since 2001. CBS had a 2016 labour force of 14,360. About 9% of CBS of this labour force was unemployed, lower than the provincial rate of almost 16%.

Employment sectors within CBS generally follow the same overall trend of the province, and the top employers in both places are health care and social assistance; retail; construction; public administration; and educational services. Though the region was once known for its agricultural significance, just over 1% of the workforce is currently employed in agriculture and related sectors, compared to over 3% province-wide. CBS does have a higher reliance on construction and public administration than the rest of the province, and relies less on manufacturing and accommodations and food services.

80% of this labour force commutes outside CBS, and major employment destinations include St. John's, the nearby Vale Inco nickel processing plant, and the Hebron offshore oil field. Employment opportunities within CBS include retail stores (such as those in the Main Street District and those under construction in the Gateway development), the CBS Industrial Park, and Long Pond Commercial Port. Some of the top employers (by number of employees) in CBS include Kent Building Supplies, Haris Rebar concrete and steel manufacturing, Trinity Resources mining, and Hickey's Greenhouses.



COMMERCIAL USES

As the region's largest town, CBS has long filled the role of "bedroom community" for nearby urban centres. Recently, however, the Town has begun to invest in developing local commercial enterprises, and recent projects include the 2013 Main Street Improvement Plan and the development of The Gateway Commercial Area. The Gateway is currently home to Kent Building Supplies, Tim Hortons, Wing'n It, and CBS Arena, and is intended to support a mix of large retailers and services, with some light industrial and office uses.

Most commercial uses in CBS are clustered in the Main Street District, along Highway 60. Businesses in the main street area are set back from the street by parking lots, and some take the form of small strip malls. Amenities here include fast food, family restaurants, grocery stores, banks, hardware shops, and personal services. Many of the businesses along main street were developed on former residential lots, and follow an organic pattern with varying lot sizes. Lately, many smaller commercial buildings in the area are being replaced with box stores such as Dominion, Sobeys, and Shoppers Drug Mart. The street network and lower densities of CBS limit the walkability of the community. Commercial development to date has, as a result, favoured commercial locations and designs that cater to customers arriving by vehicle.

As of a 2013 study*, some industries that have shown provincial growth but are underrepresented in CBS include gas stations, restaurants and bars, health and personal care, car shops, and sporting goods and hobby shops. These industries may present an opportunity for investment locally. Other types of businesses that are underrepresented in the town include clothing, building materials and laundry services, though the business trend for these categories has been a general decline in recent years.

**CBS Main Street Improvement Plan*



INDUSTRIAL USES

Population growth and increasing economic activity in CBS offer potential for industrial investors, and the Town encourages this expansion. With many residents commuting to industrial sites outside town boundaries, there is an existing skilled labour force that could be a major asset.

CBS has two key industrial areas. The town's commercial port is located in Long Pond; with capacity for multiple vessels, the port has historically handled bulk commodities including feed grain, crushed rock, lumber, and road salt, and has a 220 ton crane available for cargo loading. The port is surrounded by expanding industrial uses including storage and transfer facilities and marine services.

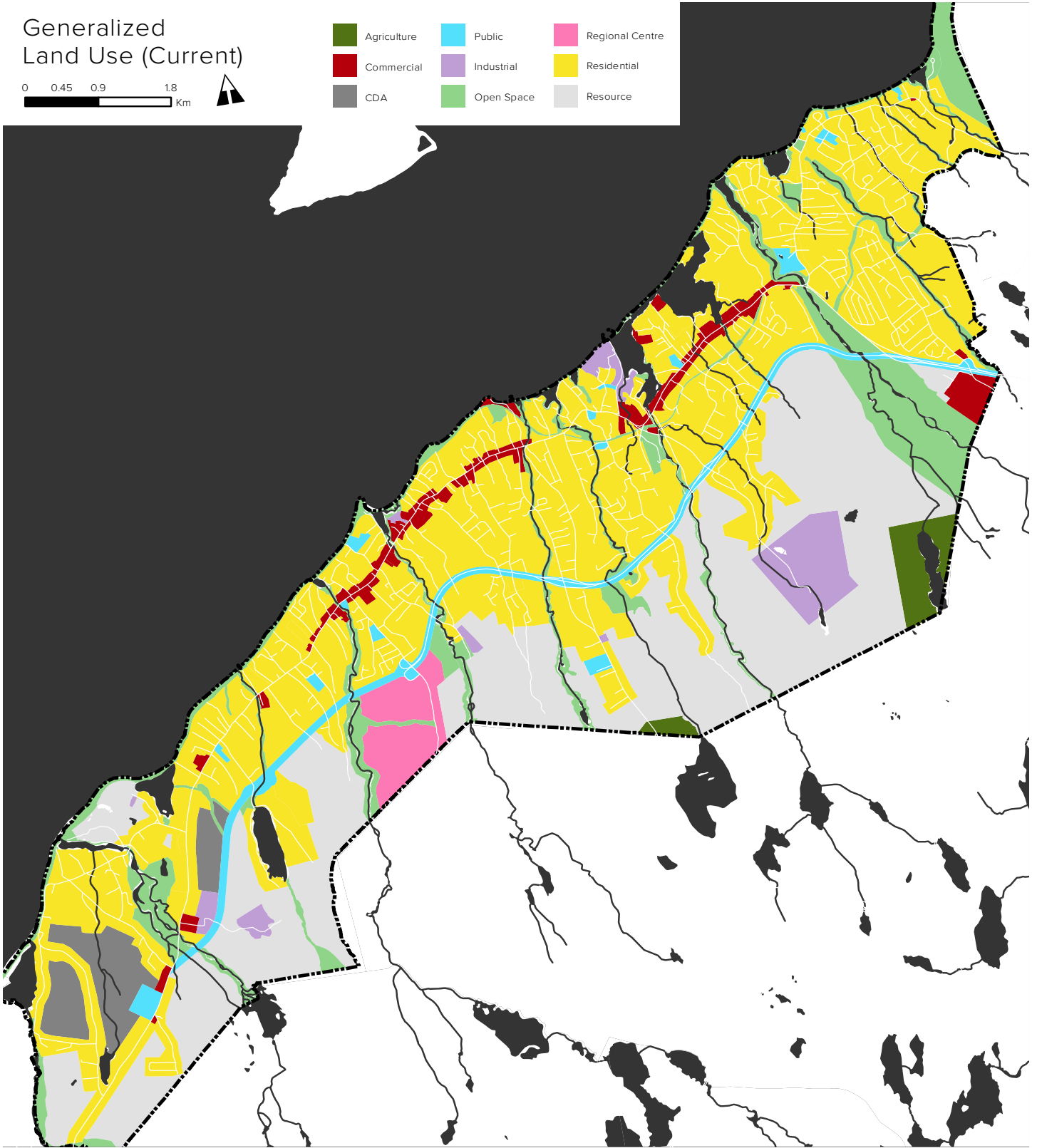
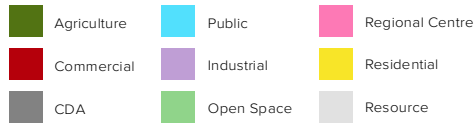
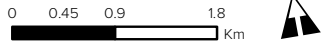
The CBS Industrial Park recently developed in the town's east end contains 76 acres of property within Commercial and Light Industrial zones. The industrial park allows warehousing, logistics operations, industrial manufacturing and service industries. While over half the park is vacant, current businesses include Blue Water Group (a warehousing and logistics firm specializing in marine and industrial supplies), Heat Pump Solutions Ltd., Ford Metcalfe Ltd (a beer distributor), Johnson Construction Ltd., Kento Windows and Doors, RV repair, Dexter Construction, and DS Drilling Services (specializing in well drilling). The developer has worked with both the Manuels River Natural Heritage Society and the Town and the land is adjacent to a buffer zone and there is a stormwater retention to pond to limit outflows to pre-development levels in order to protect water quality and public access to the Manuels River.



LAND USE + DEVELOPMENT

This section analyzes the existing land uses within CBS, which will influence future zoning and land use planning. It also looks to past trends in order to understand how the local landscape has changed over the past half a century, and looks forward to the current and future demand for development.

Generalized Land Use (Current)



LAND USE

The Town of CBS has a total land area of 61.5 square kilometres. The map of the facing page shows the land use designations from the current Municipal Plan.

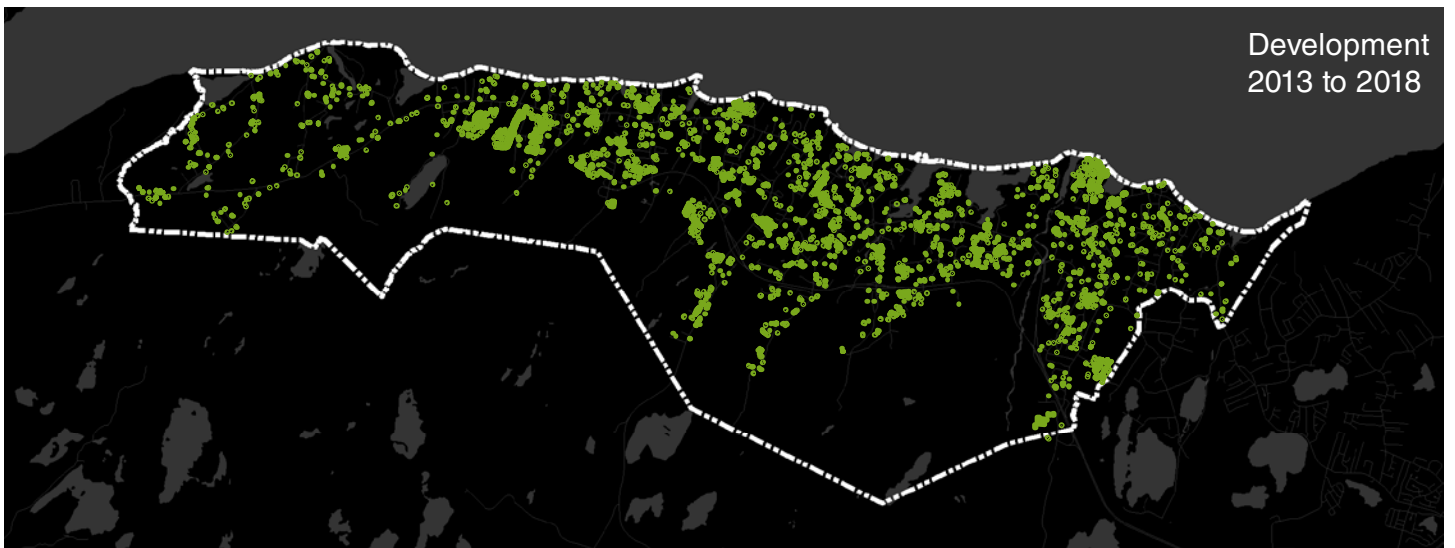
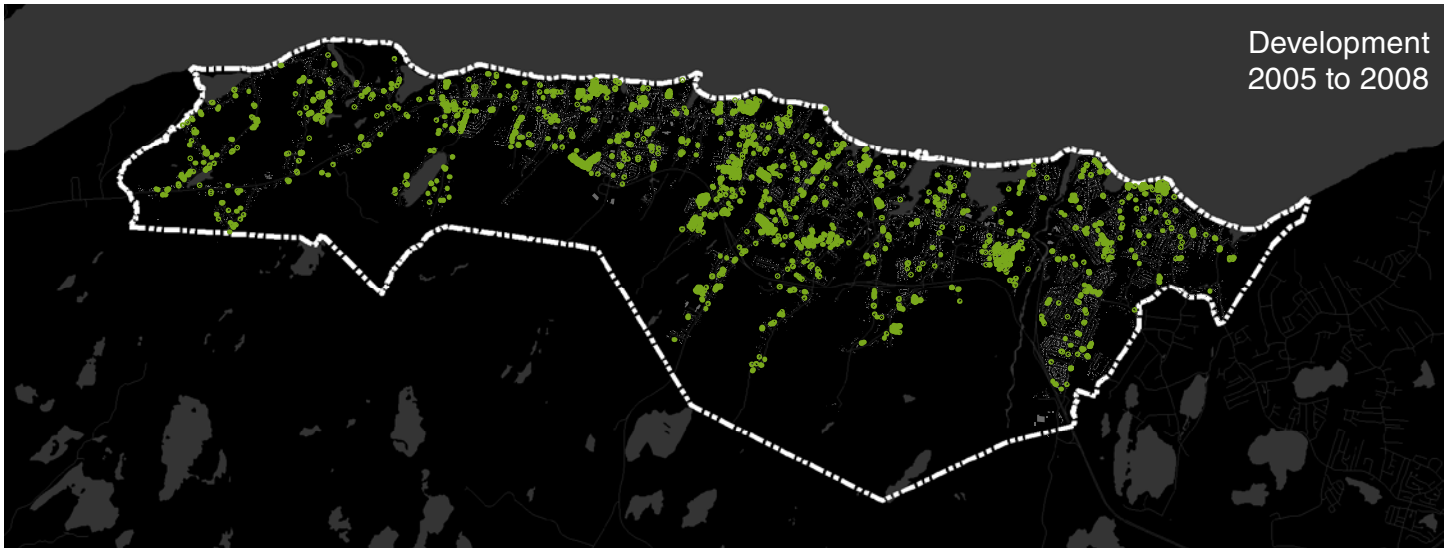
Almost half the lands within the town are residentially developed and/or designated for future residential development. This equates to 27.09 square kilometres. Around 26% or 16.31 square kilometres is utilized for resource land in CBS. This land is typically intended for agriculture, conservation, forestry, recreation and open space in inland areas. Open space and public land also equate to 11% and 7% of the total land area of CBS, respectively. These are zoned to allow uses such as trails and recreation.

Commercial development is primarily spread along the Conception Bay Highway (Route 60), with the largest concentration in the Main Street District. The Gateway development (identified as Regional Centre on the map) at Legion Road is set aside for large-format commercial development. In addition to these designated commercial areas, CBS has a number of home-based businesses located throughout its many neighbourhoods.

Industrial uses are clustered on the waterfront around Long Pond, at Lance Cove Pond, and at the pyrophyllite mine located west of Manuels River. The Conception Bay South Industrial Park, located at the interchange of Peacekeepers Way and Fowlers Road, is designated “Commercial”, but focuses on the light industrial end of the commercial land use spectrum (e.g. transportation and logistics, wholesale building supplies, etc.).

At the west end of CBS, in Seal Cove, there are undeveloped lands designated “Comprehensive Development Area”. These lands are intended to be planned in a comprehensive manner to ensure servicing, transportation networks, and density allocations are considered in a holistic manner. The comprehensive planning of these lands will occur as part of this PlanCBS plan review project.

Development Over Time



DEVELOPMENT TRENDS

As the second largest municipality in Newfoundland and Labrador, the population of CBS has grown steadily over the last half-century. Residential construction in CBS surged between 1961 and 1980, and many of these homes remain today. During that period, residential construction averaged about 100 dwellings a year. This growth trend accelerated, with an average of roughly 150 homes built per year from 1981 to 2000. Over the last 15 years, residential development has averaged 200 - 250 homes per year. From 2011 to 2016 the population grew by 5.4%, and 1,200 homes were built, coinciding with expansions to the Industrial Park and the approval of the Gateway Commercial Area.

As municipal infrastructure continues to expand throughout the town, new lands will be opened up to development. Recent residential developments include Manuels River East, Manuels River West, Conways Brook West, Foxtrap Access Road West, and Lower Gullies River West, all comprising a total of 1,275 residential lots. The Western Lands Comprehensive Plan will plan for additional residential units, expanding the market even further.

Although resource extraction industries (and the associated jobs) have slowed in recent years, CBS is also located within an easy commuting distance to major employment centres of the region, and competitive tax rates and reasonable housing prices are expected to continue to attract new families to the community over the planning period.

Demand for single-detached dwellings is anticipated to remain strong over the next decade, however, smaller housing, such as multi-unit buildings and duplexes are expected to become an increasing need as Baby Boomers retire.

Scenario 1 - Low Demand

In this scenario, population follows the low growth projections on page 10, while the average household size grows back to what it was in the 2006 census.

New population 2022 to 2033: 1,407

Average household size: 2.7

Number of new residential units by 2033: 521

Scenario 2 - Medium Demand

In this scenario, population follows the medium growth projections on page 10, while the average household size remains where it was in the 2016 census.

New population 2022 to 2033: 1,801

Average household size: 2.6

Number of new residential units by 2033: 693

Scenario 3 - High Demand

In this scenario, population follows the high growth projections on page 10, while the average household size continues to decline.

New population 2022 to 2033: 2,179

Average household size: 2.5

Number of new residential units by 2033: 872

RESIDENTIAL DEVELOPMENT DEMAND

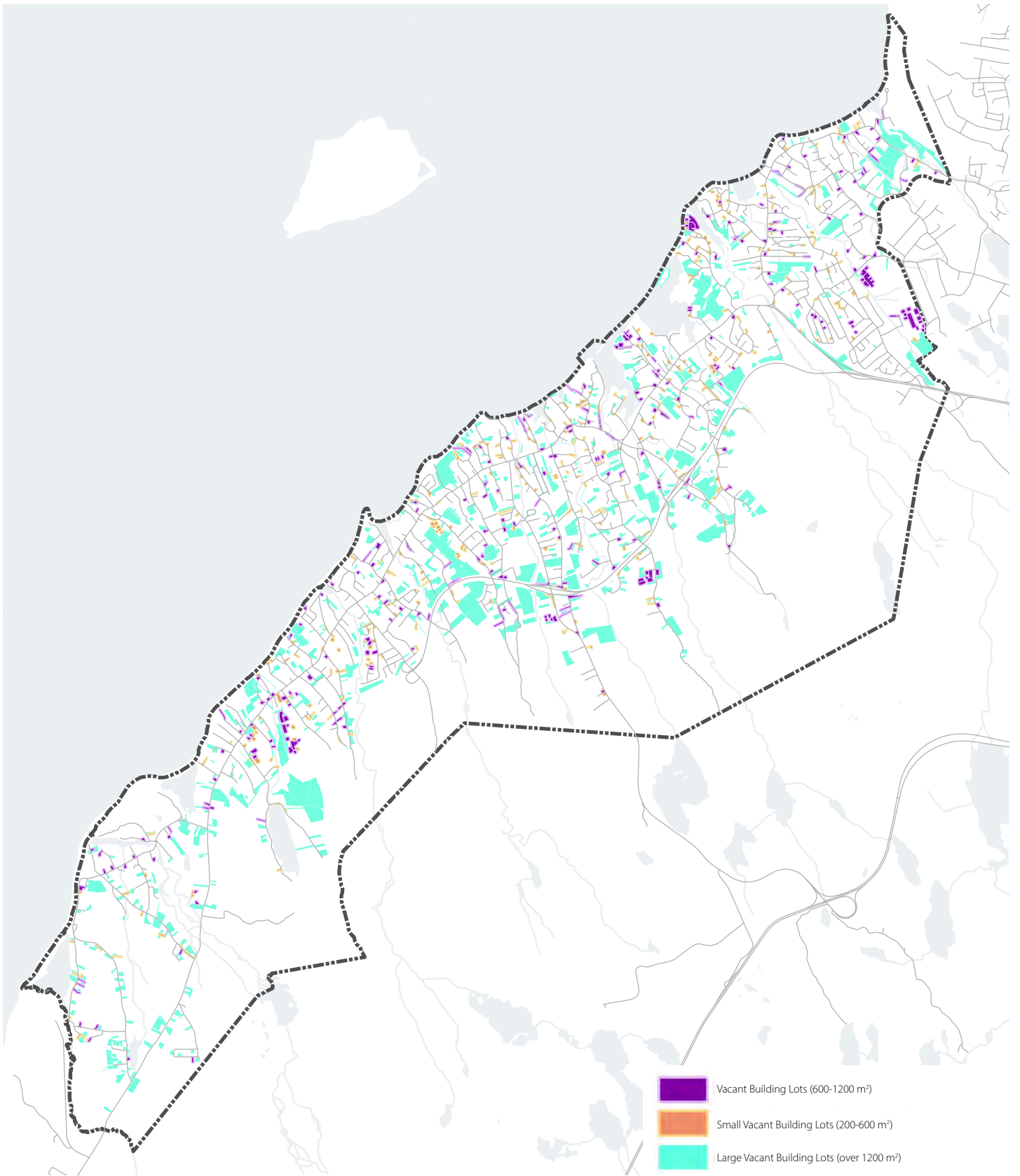
One of the roles of planning is to accommodate an adequate supply of developable land and avoid inflated land (and ultimately housing) prices caused by a restricted supply. The simplest approach to this would be to open up all lands for development at one time. However, there are direct societal costs to this in terms of the need to build large infrastructure networks.

It is, therefore, prudent to establish a supply of developable land that can accommodate expected demand (with a “safety factor” to accommodate the fact that not all available land will be developed due to the owner’s business plans, physical constraints, or any other reason) over the life of the plan, while being thoughtful about where this development happens.

The scenarios at left explore possible residential development demand over the 10-year horizon of the new Plan. These are based on assumptions about population growth and average household size. Projections are often “fuzzy” in that they depend on a set of assumptions that are affected by demographic and economic factors beyond a municipality’s control. However, they are useful for answering the question, “do we need to drastically alter the direction of the Plan?”

It must also be recognized that Plans are “living documents” in that Council is encouraged to monitor the outcomes for development over the coming years, and amend the Plan as necessary to account for up-to-date information on demand trends.

Residential development demand is also not just about the number of needed units, but the *types* of units that are in demand. CBS has historically seen demand for larger, detached homes. However, recent trends have seen a shift to smaller, more affordable units, and attached forms of housing, such as duplexes. This is borne out by feedback from developers, as well as larger societal trends while the Baby Boomer generation seeks to downsize their living arrangements.



RESIDENTIAL DEVELOPMENT DEMAND CONT.

Using the residential demand scenarios on the previous pages and the existing development patterns in Conception Bay South, the potential demand for new land to be 'opened up' for residential development can be examined. Between 2010 and 2019, there were approximately 2,000 new single dwellings constructed in Conception Bay South. However, over this period, the number of new single dwellings constructed decreased from over 300 new units in 2010 to just over 100 in 2019.

The average lot size for existing developed residential properties in CBS is 663 square metres. Within the existing residentially-zoned areas of CBS, there are 394 vacant lots that are between 600 square metres and 1200 square metres in size. These lots are all within 10 metres of the centreline of a road (*i.e.* with presumed existing road access). The average size of these lots is 831 square metres. There are also 456 under-sized (between 200 square metres and 600 square metres) vacant building lots, all within 10 metres of the centreline of a road.

In addition to lots mentioned above, there are also larger vacant lots (1200 square metres and over) within Conception Bay South that could potentially be subdivided for future residential uses. There are 893 vacant parcels over 1200 square metres that total approximately 461 hectares (1,139 acres). Assuming 32.5% of this land would be required for new roads and an average lot size of 663 square metres (as determined above), as many as 4,689 new residential lots could be created.

Not all the lots that are vacant or those that are un-subdivided are usable for residential development. Ownership issues, cost of servicing, or natural hazards may prevent many of these lands from being developed. However, this high-level analysis indicates that much of the residential demand over the next 10 years can be accommodated within the existing residentially zoned lands. With a forecast residential demand of between 521 and 872 new units between 2022 and 2033, substantial 'opening up' of residential lands may not be required. Additional residential demand may also be met in the form of smaller, more affordable units such as duplexes and backyard suites that do not require as much land area as single detached dwellings.



COMMERCIAL DEVELOPMENT DEMAND

In the existing Plan, a 306 acre area on Legion Road is designated as Regional Centre and intended to support commercial and light industrial development. The Town currently owns 80% of these lands, and since 2011 has invested in infrastructure for Phase I of the CBS Gateway development. The project design includes additional sub-phases in Phase I, as well as a second phase. In 2016 the Town commissioned a study*, which concluded these lands should continue to focus on commercial development, rather than allowing some lands to be developed for residential purposes. If this conclusion is maintained, the lands within the future phases of the Gateway development are of ample supply to cover demand for larger commercial development over the life of the PlanCBS Plan.

Smaller commercial developments, along with some 'big-box' commercial developments (grocery stores and building supplies) are located along the Conception Bay Highway (Route 60). The current land use in this area is supported by commercial zoning (C-1 and C-2) that permits a wide range of commercial uses, and the Residential Mixed (R-3) zone, which allows limited commercial uses, albeit as discretionary uses. Within these three land use zones, an extensive number of lots (approximately 90%) continue to host residential dwellings or are vacant/undeveloped, while several lots are underdeveloped (*i.e.* have a less intensive level of commercial development than permitted by the zone). These conditions point to an adequate supply of commercial land along Route 60. Changes to this area should be limited in terms of expansion of commercial zoning, and efforts should instead focus on reviewing the Development Regulations for appropriate permitted uses, and for any regulations that may make the development of certain parcels difficult (*e.g.* access requirements).

**The Gateway at CBS - Issues Paper*

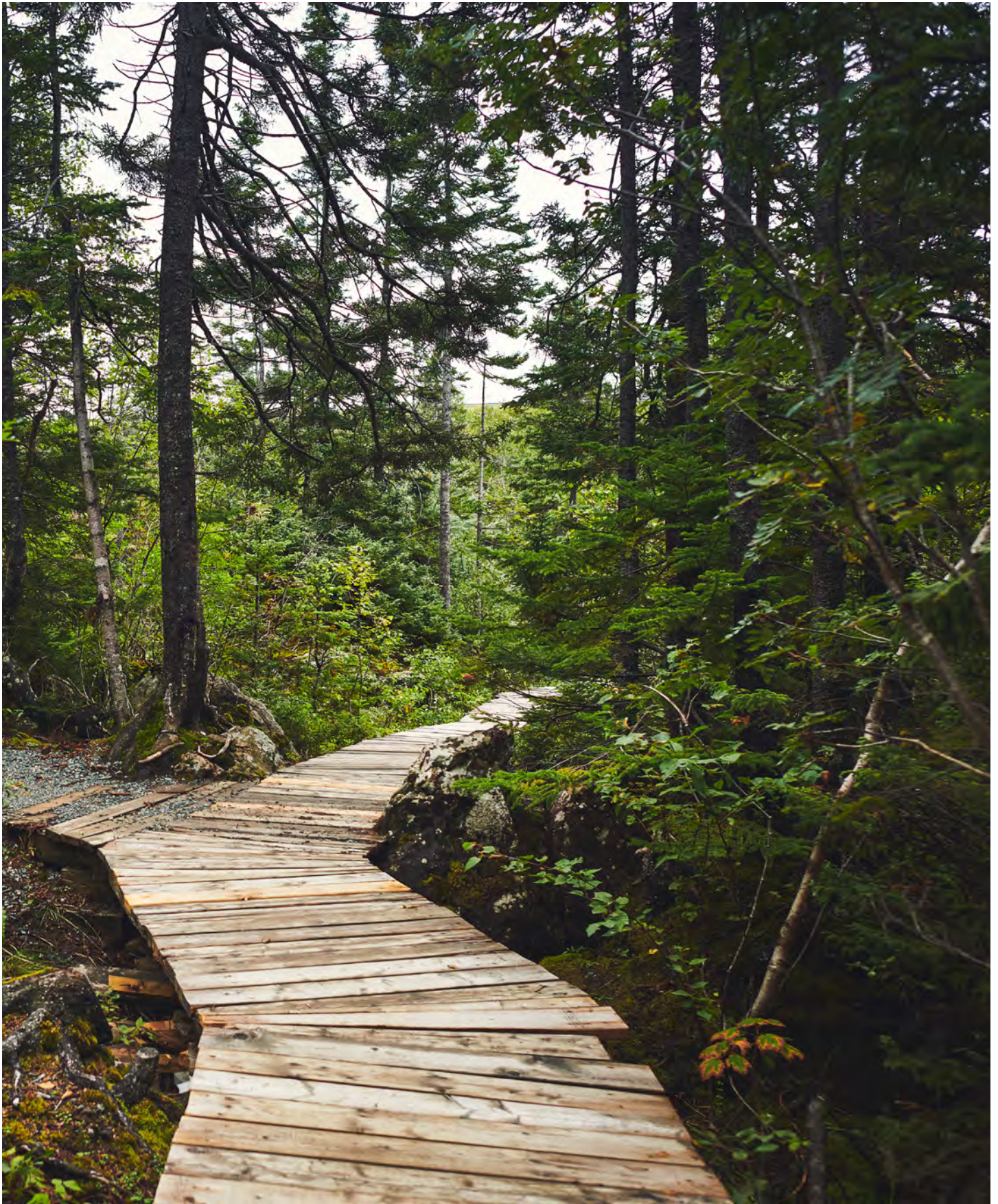


INDUSTRIAL DEVELOPMENT DEMAND

In terms of industrial lands, the Conception Bay South Industrial Park at Fowlers Road has 67 acres of land zoned for light industrial uses. Approximately half these lands have been sold, but not all of those lands have been developed. While these light industrial lands are the most constrained in terms of supply, the Gateway development is also capable of accommodating light industrial uses. There is also industrial capacity in the western half of CBS, just east of the junction of Route 2 and Route 60. This area, which is approximately 28 acres, is currently zoned for industrial development.

The potential for general and light industrial development in CBS is relatively high, especially in support of the strong oil and gas sector in Newfoundland and Labrador. The oil and gas sector has been integral to Newfoundland and Labrador over the past several decades, and the Province continues to extract and explore additional opportunities for development in the future.

CBS does not have any areas where vacant lands are zoned for heavier industrial uses (*i.e.* set aside for future industrial growth). However, given the potential impacts of these uses, it is prudent that such zones only be applied on an as-needed basis following a full review of the proposal.



OTHER ISSUES

This section of the report considers additional issues which do not fit perfectly into one category, but which influence the shape of CBS in a variety of ways. Issues include agricultural lands and operations; heritage buildings, landscapes, and regulation; as well as broad regional issues which determine the place of CBS in this wider community.



HERITAGE

CBS has grown from a series of isolated fishing villages and shoreline paths of the 17th century to its present-day condition as a group of connected, but culturally-distinct, communities. In the 19th and 20th century the settlers of present-day CBS shifted their focus from fishing to farming, and today agricultural lands are interspersed throughout the community.

In the late 20th century, CBS was incorporated as a Local Improvement District of seven communities, and then amalgamated as a Town in 1973. The Town as it is today was “completed” in 1985-86 when Foxtrap, Indian Pond, and Lawrence Pond joined the Town. While the communities that make up CBS were originally defined in reference to the shoreline features, they have grown inland along the Conception Bay Highway.

Today the Town has undertaken initiatives to recognize and designate a number of heritage buildings. There are approximately 60 heritage buildings spread throughout the town, five of which are designated by the Heritage Foundation of Newfoundland and Labrador. One small community within Topsail has also been identified as a heritage area. This area contains residences such as O’Driscolls, The Hermitage and William Hibbs, and the St. John the Evangelist Anglican Church.

Heritage guides and walking tours have been developed to promote the history represented in the area and there is an active Heritage Committee which has developed a series of brochures to celebrate the history of the community.

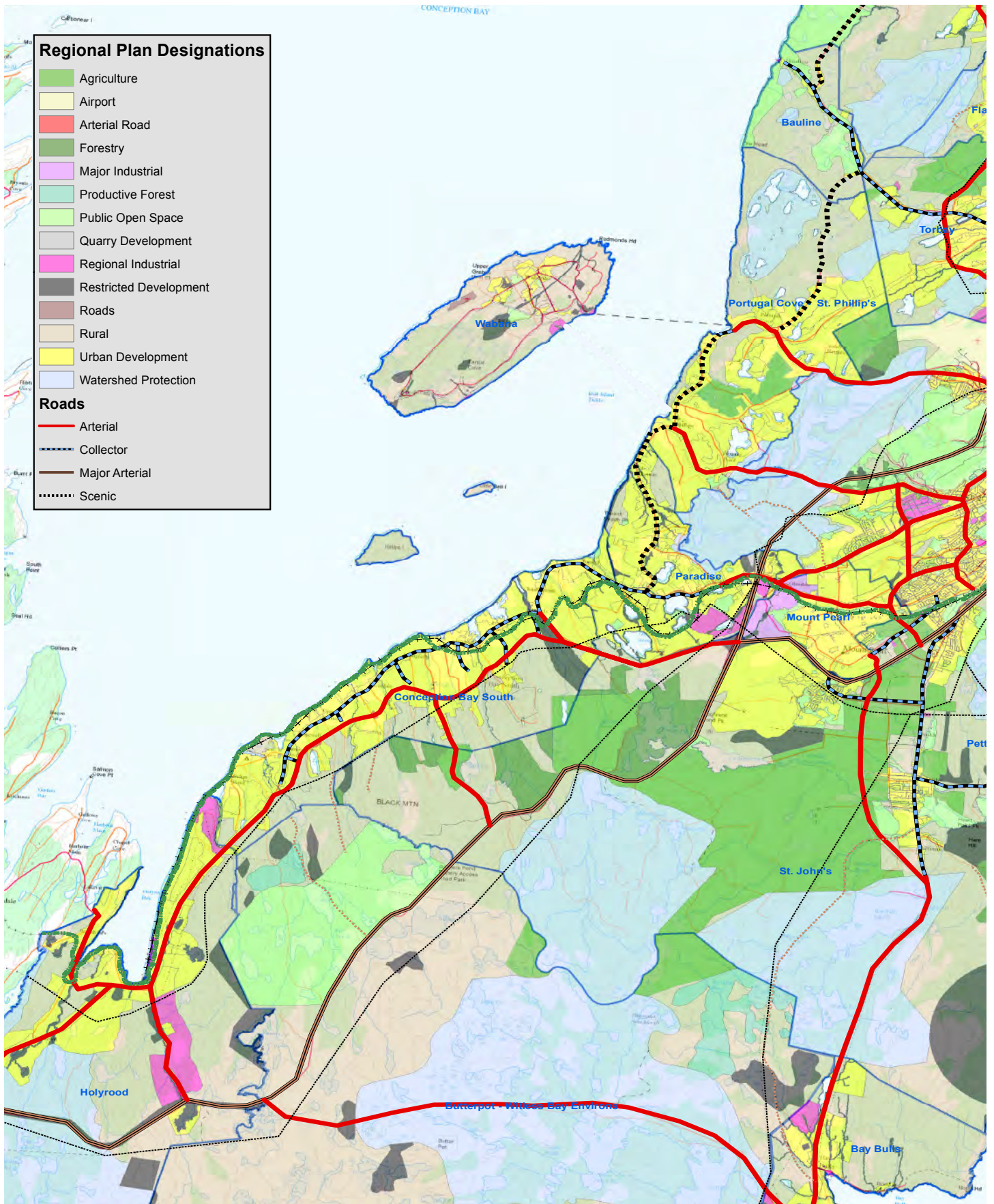


AGRICULTURE

Most of the nine communities that make up CBS were settled by English and Irish fishers in the 18th century. Crops were traditionally grown on the land backing onto fishing docks, and sold to markets in St. John's. The area's temperate climate and fertile soil made this shore more attractive than other parts of the Avalon Peninsula, and led to a prosperous agricultural industry.

Although agriculture does not have the same share of the economy that it once did, there are still a number of small vegetable farms throughout the town that provide employment and food for residents. As development pressure for residential uses increases, the Town has been exploring options for how to protect agricultural land and open spaces. The Province has been buying agricultural land through the Farmland Consolidation Program to lease back to farmers, while the Town's Open Space and Recreation Master Plan considers agricultural land as an essential component of the community's open space network and recommends the establishment of an open space fund for agricultural lands.

Recent years have seen an uptick of interest in smaller-scale, or "hobby", farming and urban farming. In February of 2022 the Town released for public consultation draft changes to the Municipal Plan and Development Regulations to recognize and explicitly enable these types of development, including establishing provisions for beekeeping, backyard poultry, and backyard livestock.



REGIONAL ISSUES

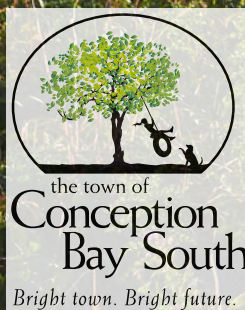
Conception Bay South is located within the St. John's Urban Region, and as a result is included within the St. John's Urban Region Regional Plan. This document, developed in 1976 and amended many times since, provides an overarching planning framework for the whole region. Local plans must conform with the Regional Plan.

Within the Regional Plan, CBS is identified as a "sub-regional centre". The following policy specifically addresses CBS:

"The Conception Bay South area shall be encouraged to develop the range of local services consistent with the anticipated size of the community. Permitted uses of land, once municipal services are installed, shall therefore include a wide range of residential densities; sub-regional, local and highway commercial facilities; parks and community facilities, elementary and high school facilities and other uses characteristic of the area's position as a secondary level centre of development."

The Regional Plan also includes a map of broad land use designations (see excerpt on facing page). The Urban Development designation applies to areas where serviced development is permitted, while the Rural designation is intended for rural uses (forestry, etc.) and limited, unserviced, residential development.

The Regional Plan is quite old, as far as plans go, and efforts have been underway for many years to replace it with a new plan, dubbed the Northeast Avalon Regional (NEAR) Plan. However, these efforts have not been successful to date, and do not appear like they will be successful before the PlanCBS project concludes. As a result, the St. John's Urban Region Regional Plan remains in effect and the updated Plan for CBS must continue to comply, or a request must be made to amend the Regional Plan to accommodate any deviations (e.g. expansion of serviced areas beyond the current Urban Development designation).



the town of
**Conception
Bay South**
Bright town. Bright future.