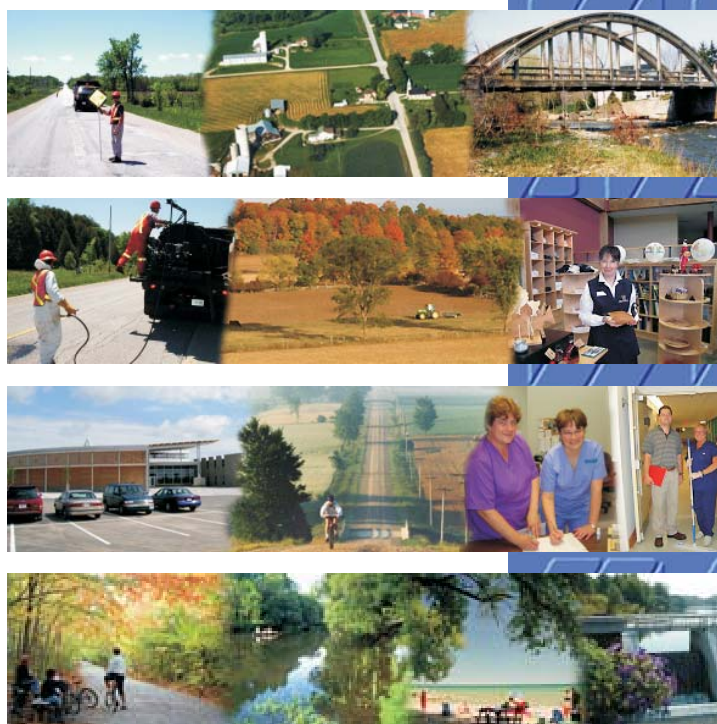
Grey County Growth Management Strategy

Growth Allocations and Issues Report



Submitted To:

The Corporation of the County of Grey
Planning and Development

Submitted By:

MALONE GIVEN PARSONS LTD.

In Association With:

The Centre for Spatial Economics (C_4SE)

April 2008

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EXECUTIVE SUMMARY

Malone Given Parsons Ltd. and the Centre for Spatial Economics have been retained by the County of Grey to prepare a growth management strategy. The recommended strategy is to be expressed in draft policies to be considered for incorporation into the Official Plan during its 5-year review process. This *Growth Allocations and Issues Report* details the research and methodologies used to develop growth projections and allocations, to calculate the vacant land supply and demand balance, and to identify policy areas to be considered in the growth management strategy. This report supports the *Growth Management Strategy Report* which presents recommended Official Plan policy revisions which will be considered and complemented by other policy changes recommended through the County's 5-year review process of the Official Plan.

The County of Grey's growth management strategy is based on permanent population, household and employment growth projections to 2031. These projections have been developed with consideration of historic growth patterns, economic prospects for the County's employment base, migration patterns and expected drivers of future growth. County-wide projections are presented in the table below.

County of Grey Projections, 2006 to 2031

	2006	2011	2016	2021	2026	2031
Population	95,900	102,200	107,700	113,800	116,900	119,500
Households	37,100	40,400	43,500	46,600	48,500	50,200
Employment	38,400	41,000	42,500	44,000	44,000	44,000

Source: C4SE

County-wide growth has been allocated to the County's nine area municipalities based on a review of historic growth trends and an understanding of the forces that are likely to influence the location of future growth. Population allocations are presented in the table below.

Population by Area Municipality, 2006 and 2031

	2006		2031		Growth 2006 to 2031	
	Population	County Share	Population	County Share	Population	County Share
West Grey	12,700	13.2%	15,900	13.3%	3,200	13.6%
Southgate	7,500	7.8%	11,400	9.5%	3,900	16.5%
Grey Highlands	9,800	10.2%	13,400	11.2%	3,600	15.3%
Hanover	7,400	7.7%	8,700	7.3%	1,300	5.5%
Chatsworth	6,600	6.9%	8,200	6.9%	1,600	6.8%
The Blue Mountains	7,000	7.3%	9,700	8.1%	2,700	11.4%
Meaford	11,400	11.9%	13,500	11.3%	2,100	8.9%
Georgian Bluffs	10,900	11.4%	13,800	11.5%	2,900	12.3%
Owen Sound	22,600	23.6%	24,900	20.8%	2,300	9.7%
County of Grey	**95,900**	**100.0%**	**119,500**	**100.0%**	**23,600**	**100.0%**

Source: C4SE

Recognizing both the efficiencies and environmental benefits of compact development, growth is encouraged to locate in existing settlements areas. We acknowledge, however, that the abundant supply of rural lots of record and the historic trend for residential growth to locate primarily in the County's rural areas creates challenges for achieving more efficient development patterns. In an effort to direct growth to settlement areas, the Growth Management Strategy establishes targets for settlement residential growth by area municipality. These targets are presented in the table below.

Settlement Residential Growth Targets

	Total Residential Unit Growth 2006-2031	Settlement Area Target	Number of Settlement Area Units	Number of Non-Settlement Area Units
West Grey	1,700	60%	1,020	680
Southgate	1,900	60%	1,140	760
Grey Highlands	1,800	60%	1,080	720
Hanover	800	100%	800	-
Chatsworth	800	40%	320	480
The Blue Mountains	1,300	80%	1,040	260
Meaford	1,200	60%	720	480
Georgian Bluffs	1,700	60%	1,020	680
Owen Sound	1,900	100%	1,900	-
County of Grey	**13,100**	**69%**	**9,040**	**4,060**

Source: MGP

A vacant land supply and demand analysis concludes that there is a sufficient supply of designated land in each of the County's area municipalities to meet settlement growth targets. In the case of West Grey and Grey Highlands, future decisions will have to consider where settlement growth is best located.

The following points summarize some of the policy directions recommended to influence the amount, rate, and location of future growth in the County of Grey.

- Strengthen policies that direct growth to urban areas.
- Add policies that would make the County Official Plan to be consistent with the 2005 Provincial Policy Statement.
- Regularly monitor the supply of urban and rural vacant land across the County.
- Introduce policies that encourage intensification of the built-up area and higher densities on greenfields.
- Encourage compatible development.
- Protect prime agricultural areas and environmentally significant features.

The accompanying *Growth Management Strategy Report* addresses these issues by providing recommendations for revised policies for incorporation into the County Official Plan. These will be considered with other possible amendments through the completion of the Official Plan Review Process.

1.0 INTRODUCTION

Malone Given Parsons Ltd. and C4SE have been retained by the County of Grey to prepare a Growth Management Strategy to be expressed in draft policies to be incorporated in the Official Plan during its 5-year review process. The strategy will be based on permanent population, household and employment growth projections to 2031 and land supply analyses. It will address:

- growth projections for the County as a whole;
- allocations of that growth to the County's area municipalities;
- the proportion of growth expected to be accommodated by intensification and existing designated land supply within existing settlement boundaries;
- the proportion of growth expected to be accommodated on existing lots of record in the County's rural areas; and,
- the proportion of growth expected to be accommodated by the designation of new lands for urban development through expansions to existing settlement boundaries.

The growth management strategy is to be completed over two phases:

- *Phase 1 – Build Foundations*, the preparation of preliminary growth forecasts and allocations; and,
- *Phase 2 – Define the Growth Management Strategy and Implementing Policies*, the development of the Growth Management Strategy itself and of the implementing policies.

Phase 1 of the growth management strategy process concluded with a draft report entitled *Preliminary Growth Allocations, Options and Issues Report* dated June 2007. The draft report formed the basis for a presentation to the County of Grey Planning Committee at a July 23, 2007 meeting. It was also used to kick off *Phase 2*, as it formed the basis for discussions at an August 2, 2007 Growth Management Directions Workshop held with the County of Grey planning staff and area municipal representatives. Representatives had an opportunity to provide comments on the preliminary allocations at the workshop, in subsequent meetings, and in writing following the meetings.

This *Growth Allocations and Issues Report* is an update to the earlier draft *Preliminary Growth Allocations, Options and Issues Report*. It incorporates comments received from the County and area municipalities during the consultation period and includes updated projections and allocations that form the basis for the growth management strategy.

2.0 GROWTH CONTEXT

This section introduces the approach used to project growth in the County of Grey and provides details on the existing demographic and local and regional economic conditions that will influence the amount and rate of growth in the County of Grey to 2031.

2.1 Growth Projection Approach

C4SE's approach to growth projections differs from standard age cohort models in that it links future net migration to a community's economic prospects and labour force requirements.

Most population projections at the community level are prepared using an age cohort model that ages people in place by one year each year, projects births by applying assumed rates of fertility by age of mother, projects deaths by applying assumed mortality rates by age and gender, and assumes an annual profile for net migration by age and gender that reflects past trends. In this framework the key driver of the community's population growth is net migration. Missing from this straight forward and time tested framework, however, is a link between net migration and the economic potential of the community. Projecting net migration into the future at a rate that reflects the past is unrealistic given the major changes in industrial and consumer spending trends underway across the country and around the world.

The C4SE population projection framework amends the above framework in a significant way by turning net migration from an assumed variable into one that is determined by the community's economic prospects and its labour supply.

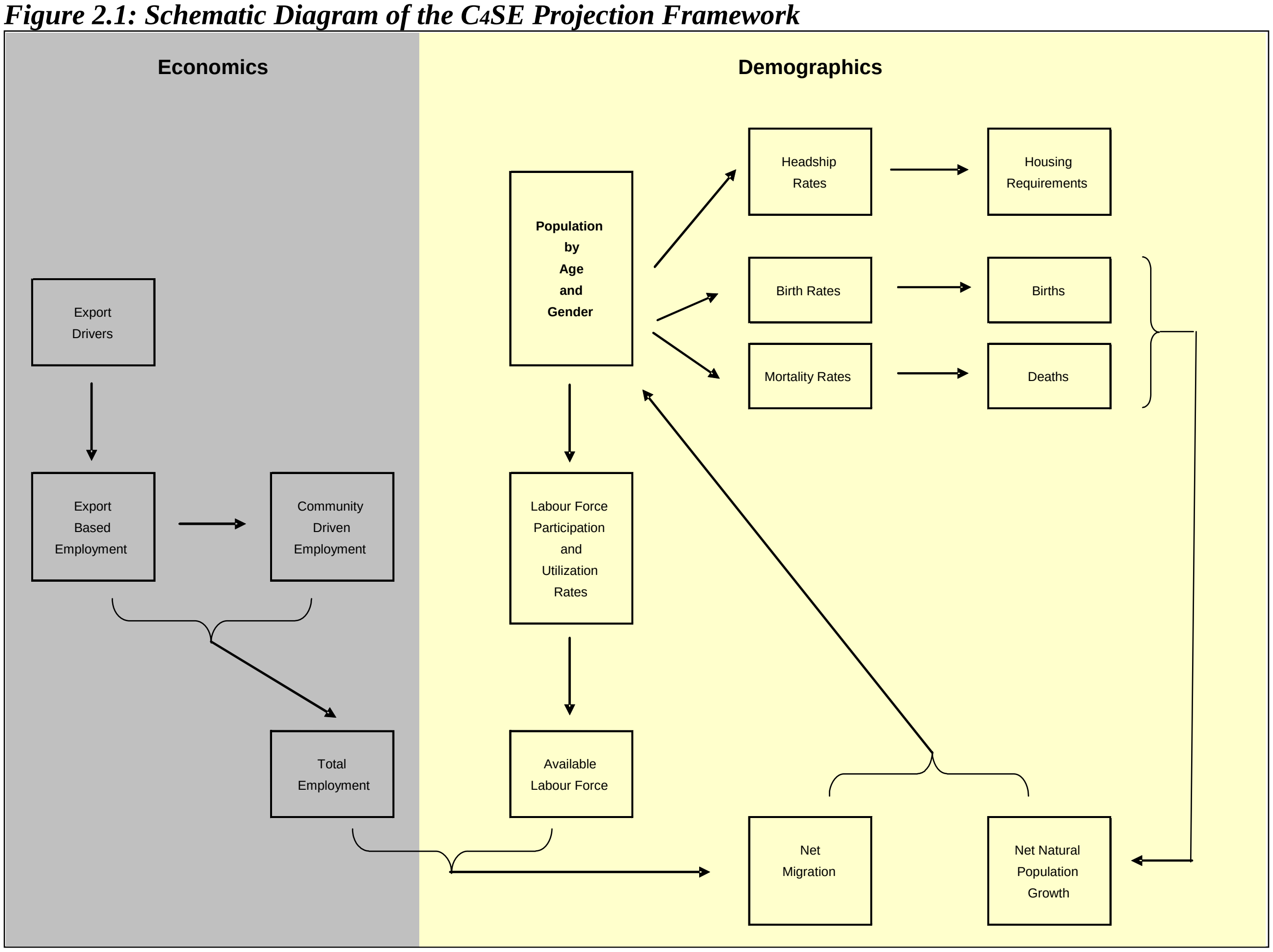
The amount and rate of growth in a community is largely determined by the future expansion of export-based industries.

The economic activities occurring in a community can be divided into those that are *export-based* and those that are *community-based*. Export-based industries produce goods that are shipped to markets outside the community (agriculture, forestry, fishing and manufacturing), or they provide services to visitors and seasonal residents of the community (hotels, restaurants, recreation attractors, specialized hospitals, colleges and universities) or to businesses outside the community (specialized financial, professional, scientific and technical services). Community-based industries produce services that meet the needs primarily of the local residents in the community (retail, medical, primary and secondary education, and personal and government services).

Growth in a community will typically occur only if its export base is expanding. Expansion of the export-based industries drives the growth of the community at large. Without growth in a community's export-based industries growth in its community-based activities is unlikely to occur. The export-based industries in a community as a group are often referred to as its *economic base*. The terms *export-based* industries and *economic base* industries can be used interchangeably, as they refer to the same concept.

The C4SE projection framework recognizes the distinction between *economic base* and *community base* industries and establishes a link between total employment and labour force. In the C4SE framework, if forecast employment growth exceeds the number of workers available, net migration is assumed to increase to respond to the local labour market requirements (as demonstrated in the rapid population growth in Calgary and the Greater Golden Horseshoe due to significant employment growth). In contrast, if employment growth is less than the number of available workers, negative net migration is assumed because workers will leave to find jobs in other communities (as demonstrated in Timmins where the population is declining). *Figure 2.1* provides a graphic representation of the C4SE forecast approach.

Figure 2.1: Schematic Diagram of the C4SE Projection Framework



Like most other forecast approaches, the C4SE framework incorporates demographic information into its projections by making assumptions about a community's population by age and gender in a base year and adjusts it over time using assumed fertility and mortality rates (yellow section in *Figure 2.1*). The framework, however, determines net migration by linking it to the subject community's and surrounding communities' labour market requirements. This need is driven by the potential for the community to grow its economic base which, in turn, is determined by the potential for growth in its exportable goods and services (grey section in *Figure 2.2*).

The rest of this section describes the County of Grey's current demographic and economic context and describes employment and commuter trends that will influence the County's future rate of growth.

2.2 Permanent Population Profile and Growth

Over the last ten years, the County of Grey's population has grown at a faster rate than that of Huron or Bruce County, but at a slower rate than for the Province.

The County of Grey's population has grown from 87,600 residents in 1996 to 92,400 in 2006, an increase of about 4,800 residents, or 5.5% over the 10 year period. As demonstrated in *Table 2.1*, the County's pace exceeded that of neighbouring municipalities Huron County (-1.4%) and Bruce County (-0.6%) but was slower that the provincial rate of growth (12.3%).

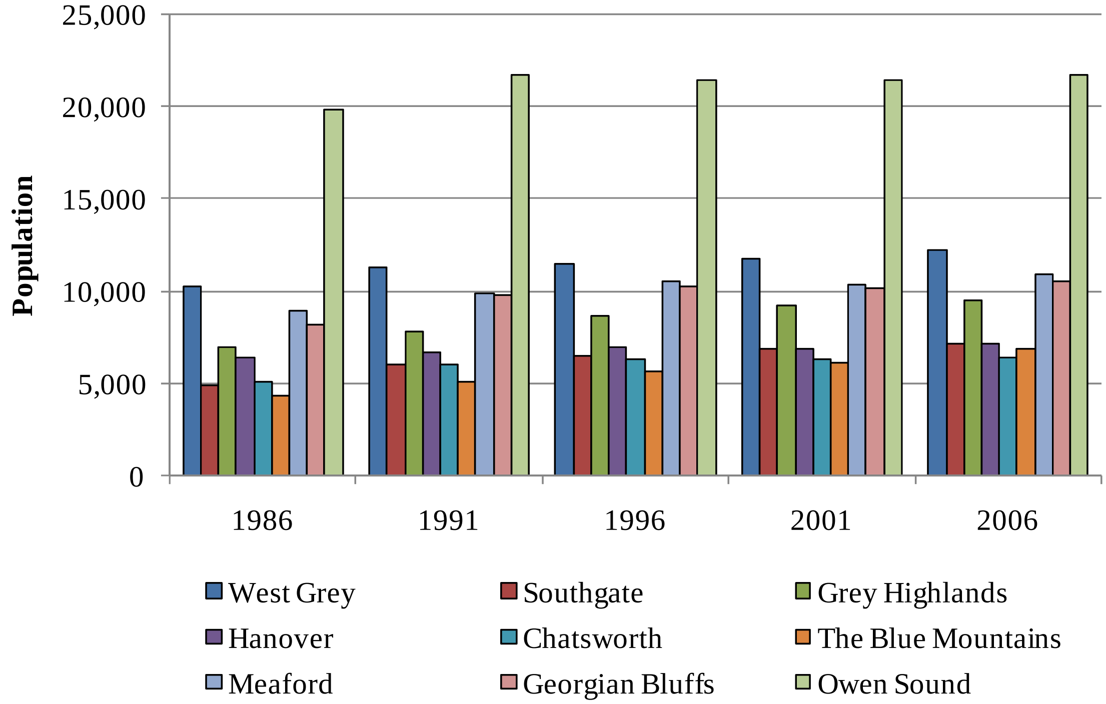
Table 2.1: Growth in the County of Grey and Neighbouring Counties

	1996 Population	2006 Population	Percent Growth
Grey County	87,600	92,400	5.5%
Huron County	60,200	59,300	-1.4%
Bruce County	65,700	65,300	-0.6%
Wellington County	171,400	200,400	16.9%
Dufferin County	45,700	54,400	19.0%
Simcoe County	329,900	422,200	30.0%
Ontario (thousands)	10,800	12,160	12.3%

Source: Statistics Canada
Note: Based on Census results and does not include undercount. Anecdotal information suggests that population growth in Grey County's Amish and Mennonite communities may not be reflected in Census data.

Each of Grey's nine area municipalities has, in general, experienced steady growth over the last 20 years, although Hanover, Meaford, and Georgian Bluffs experienced some population loss between 1996 and 2001. While Owen Sound has historically accommodated about a quarter of the County's population, its share is decreasing. Its 1.4% growth between 2001 and 2006 was the lowest of the County's nine area municipalities. The Town of The Blue Mountains captured the largest 2001 to 2006 gain both in absolute and relative terms. *Figure 2.1* presents the County of Grey's and its area municipalities' populations in census years from 1986 to 2006. More detailed growth statistics are presented in Appendix A.

Figure 2.2: County of Grey and its Area Municipalities' Permanent Populations, 1986 to 2006

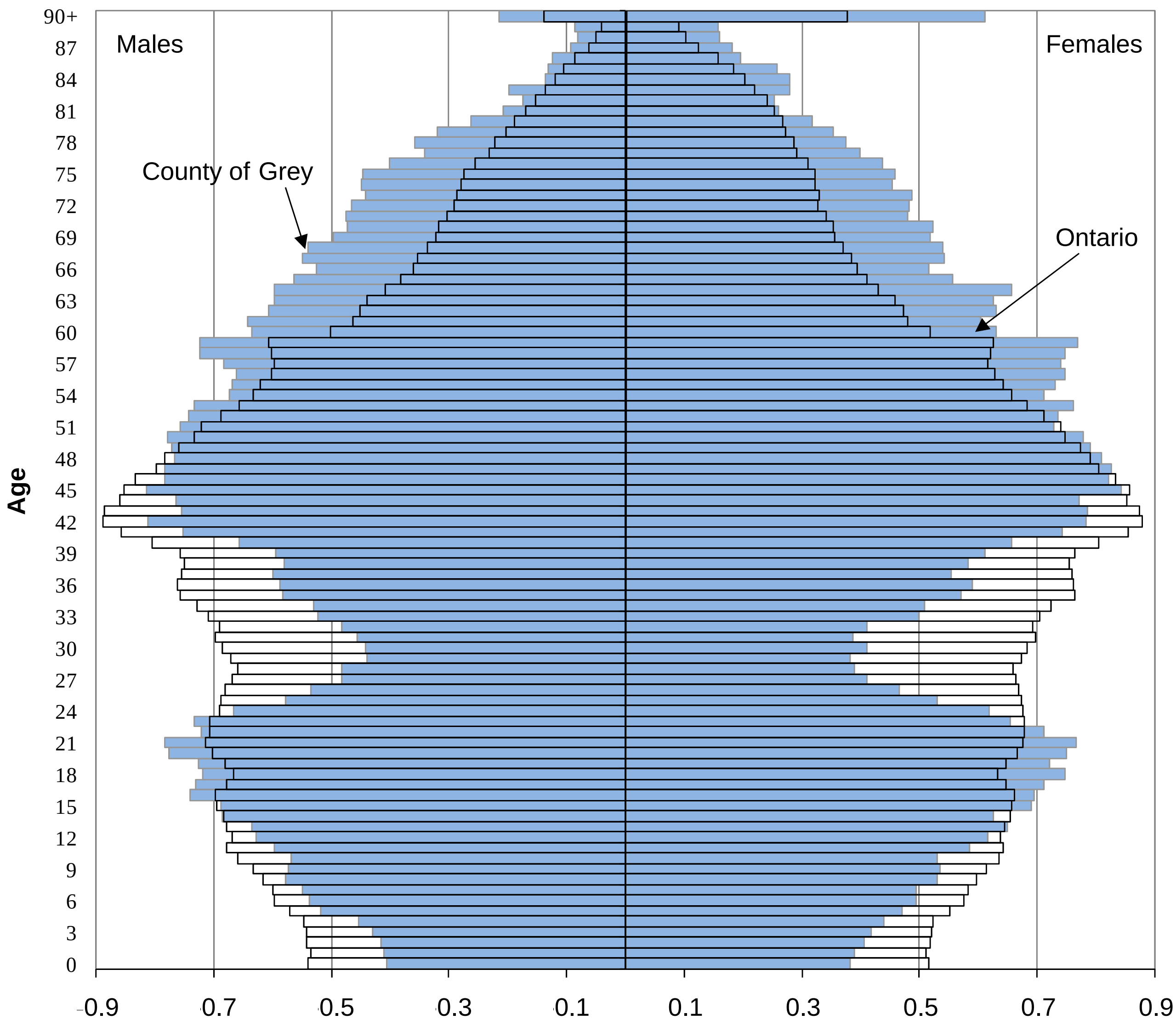


Source: Statistics Canada
Note: Based on Census results and does not include undercount.

Grey's permanent population is slightly older than that of Ontario as a whole.

The age profile of the County's permanent population in 2006 by age and sex shows that it is slightly older than that of Ontario as a whole. The County has relatively more people than Ontario over the age of 50 and fewer than the province among those aged 25 to 49. The relative age distribution of the population reflects, in part, the County's strong attraction as a place for retirement. The relatively low proportion of residents aged 24 to 49 and children younger than 12 is due in part to the County's agricultural economy and the lack of employment prospects for working aged residents and their dependents. The County of Grey's population by age and gender is presented in *Figure 2.2*.

Figure 2.3: County of Grey's Permanent Population by Age and Gender Relative to Ontario, 2006



Source: Statistics Canada and C4SE

2.3 Permanent vs. Seasonal Residents

The County of Grey has a large seasonal population that is not reflected in permanent population statistics.

A key difference between the County of Grey and other parts of the province is that some people living in other municipalities own seasonal residences in the County and spend considerable amounts of time there pursuing recreational and leisure activities. There is no "official" count of the number of seasonal residents in Grey, as these people are counted by Statistics Canada in the municipality in which they reside on a permanent basis. Similarly, the census does not collect information with respect to ownership of seasonal units outside of respondents' place of permanent residence.

The census, however, does capture the total number of occupied dwellings in each community which can be used to provide an indication of the number of seasonal dwellings in the County. As demonstrated in *Table 2.2*, in 2001 and 2006 about 83% of dwellings in Grey were occupied by people who resided permanently in the County. While it can be expected that there will be some level of vacant dwellings, Grey's 16% unoccupied dwelling figure is very high compared to the provincial average of 8%.

A large proportion of unoccupied dwellings can reasonably be inferred to represent units used by seasonal residents. In 2006, the Blue Mountains and Grey Highlands had the lowest proportion of occupied dwellings at 52% and 72% respectively. This can be expected, as these two municipalities have the highest proportions of recreational development in the County. If we assume that the 2006 household size (2.4 ppu) was the same for The Blue Mountains' seasonal units as permanent units, seasonal population would represent another 6,100 recreational residents. Meaford, Chatsworth, and Georgian Bluffs also had lower proportions of occupied dwellings than that of the province.

Differences in the proportion of unoccupied dwellings between 2001 and 2006 highlight some important trends. The increase in occupied dwellings in The Blue Mountains over the five year period is indicative of seasonal dwellings being converted to permanent dwellings, a trend not well documented in other research.

Appendix B provides greater details on the number of building permits issued for permanent residential units in Grey's area municipalities.

Table 2.2: Occupied Dwellings, 2001 and 2006

	2001			2006			Difference in Proportion 2001 to 2006
	Total Private Dwellings	Total Private Dwellings Occupied by Usual Residents	Proportion Occupied by Usual Residents	Total Private Dwellings	Total Private Dwellings Occupied by Usual Residents	Proportion Occupied by Usual Residents	
West Grey	5,062	4,505	89.0%	5,265	4,719	89.6%	0.6%
Southgate	2,665	2,415	90.6%	2,801	2,564	91.5%	0.9%
Grey Highlands	4,855	3,555	73.2%	5,142	3,687	71.7%	-1.5%
Hanover	3,005	2,900	96.5%	3,192	3,044	95.4%	-1.1%
Chatsworth	2,627	2,230	84.9%	2,742	2,366	86.3%	1.4%
The Blue Mountains	5,374	2,585	48.1%	5,619	2,939	52.3%	4.2%
Meaford	4,877	4,190	85.9%	5,193	4,442	85.5%	-0.4%
Georgian Bluffs	4,399	3,750	85.2%	4,697	4,027	85.7%	0.5%
Owen Sound	9,532	9,195	96.5%	9,736	9,381	96.4%	-0.1%
Total County of Grey	**42,396**	**35,325**	**83.3%**	**44,387**	**37,169**	**83.7%**	**0.4%**
Ontario (thousands)	**4,556**	**4,219**	**92.6%**	**4,973**	**4,554**	**91.6%**	**-1.0%**

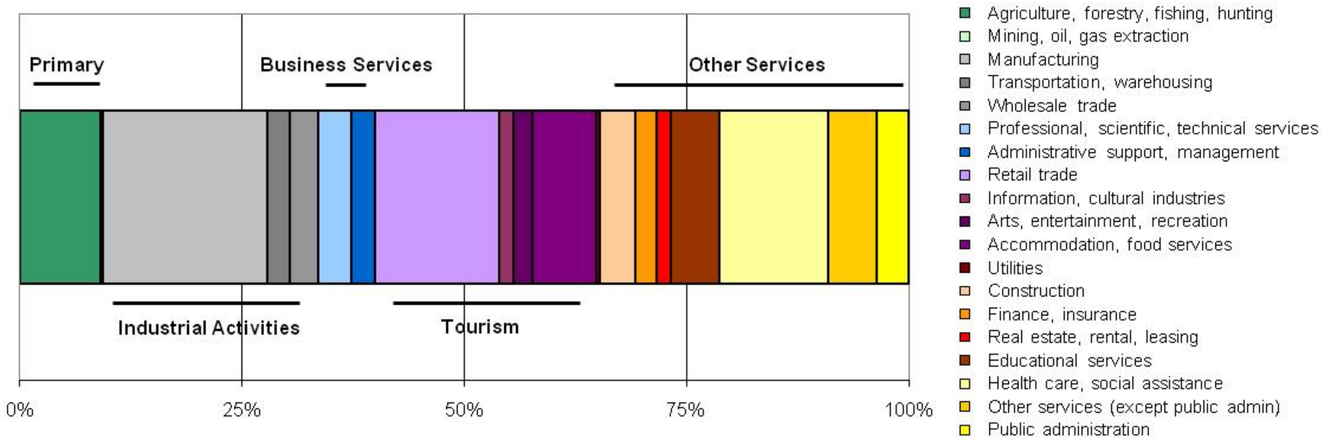
Source: Statistics Canada

2.4 Economic Context

The County of Grey accommodates a diverse range of jobs.

In 2001, there were 35,200 jobs in the County of Grey. About a quarter of the County's jobs were in the Industrial Activities and Tourism industries. An another 10% of jobs were in Primary industries. *Figure 2.3* provides a graphical summary of the County of Grey's jobs by industry.

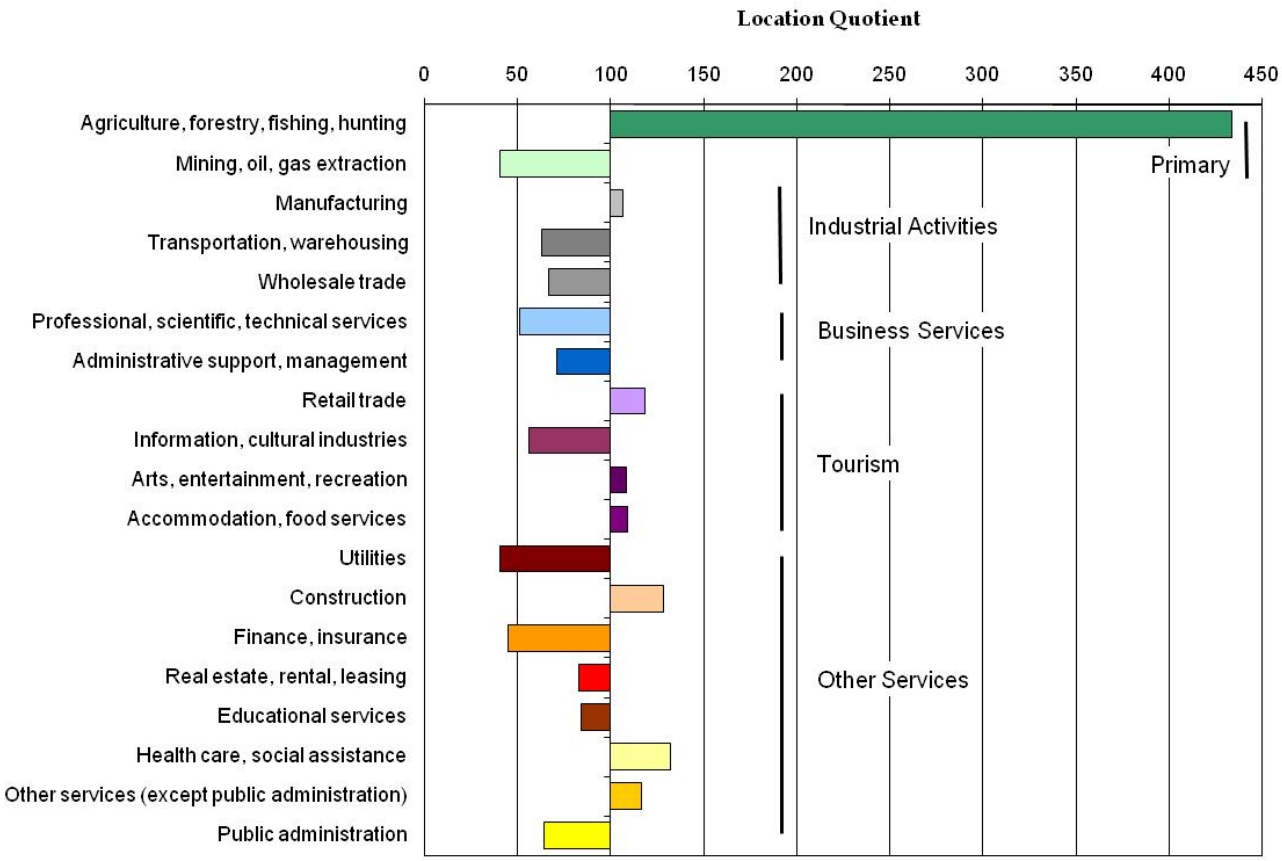
Figure 2.4: County of Grey's Jobs by Industry, 2001



Source: Statistics Canada and C4SE
Note: These statistics do not capture workers with "No Fixed Workplace" who may work in the County of Grey.

The employment structure of a community is characterized through the use of *location quotients*. These measure the importance of employment by industry by place of work relative to the industry's importance as an employer across the province of Ontario as a whole. Where an index for an industry exceeds 100 it means that jobs in that industry are relatively more plentiful than they are across the province, indicating a relatively high level of economic dependence locally on that industry. *Figure 2.4* provides location quotients for the County's nineteen industries. Location quotients for each area municipality are presented in Appendix C.

Figure 2.5: Location Quotients by Industry for County of Grey Relative to Ontario, 2001



Source: Statistics Canada, 2001 and C4SE

The following points summarize the findings of the location quotient analysis:

- The number of jobs in the County of Grey in Agriculture, Forestry, Fishing, or Hunting is very high compared to that of the Province, with a location quotient of 434. In 2001, these jobs represented 9% of total employment in Grey.
- Tourism is an industry that the system of industrial accounts does not identify separately. The needs of tourists are typically seen to be met in part by accommodation and food services; arts, entertainment and recreation services; retail trade; and information and cultural industries. The County's relative strength in tourism is demonstrated by its higher than 100 location quotient in 2001 in industries making up the Tourism category.
- Grey's manufacturing presence was higher than that of the average for Ontario in 2001. Employment in that industry represented 18% of the jobs in the County.

- The high location quotients in health care and social services are weighted to Owen Sound, which is a major service centre for the County and a much larger region.

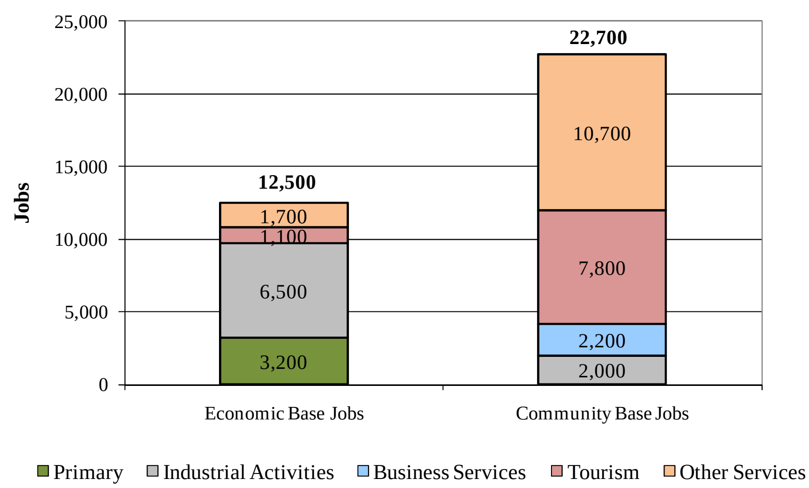
- The high location quotients in construction in the County are weighted to the Blue Mountains, which is a function of increased seasonal growth in that area municipality.

About a third of the County of Grey's jobs exist for export purposes.

Typically, population and employment growth in a community will only occur if its *export base* is expanding. Growth in employment in *export-based* industries attracts workers and their dependents. These residents require housing, food, clothing and other household goods and services. Their needs lead to the expansion of *community-based* jobs in the retail, finance, health, education and other service sectors.

Figure 2.5 classifies the County of Grey's 2001 employment by place of work for each major industry group as either economic base or community base employment. It demonstrates that in 2001 35.5% of the jobs in Grey existed for export purposes. Economic base employment typically accounts for between one-quarter to one-third of all the jobs in any given community. The relative size of the County's economic base is within the norm. More than half of the County of Grey's economic base jobs were in industrial activities, mostly manufacturing. About a quarter were in primary activities, mostly agriculture.

Figure 2.6: County of Grey's Economic base and Community base Employment by Major Industry Group, 2001



Source: Statistics Canada, 2001 and C4SE

2.5 Influence of Commuters

Growth in the County of Grey's employed labour force between 1996 and 2001 is linked to job growth in surrounding counties.

As demonstrated in *Table 2.3*, the County of Grey's employment by place of residence between 1996 and 2001 grew from 40,600 to 43,160, indicating that the number of County residents with jobs grew by 6.3%. In contrast the number of Grey residents working in the County grew by only 2.1% and the number of jobs in Grey grew by a mere 1%. By comparison, jobs in nearby communities grew by 19.2% and Grey residents working outside of Grey grew by 13.9%. These statistics demonstrate that there is a large and growing commuter base in the County of Grey.

Table 2.3: Employment Growth Trends, 1996 to 2001

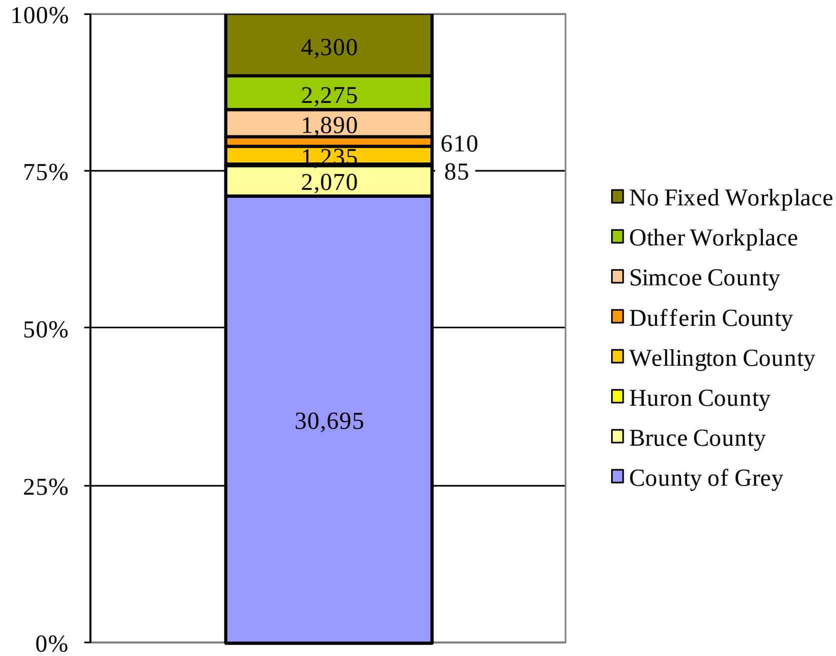
	1996	2001	% Change
County of Grey	24,055	24,630	2.4%
At home	6,020	6,065	0.7%
Total County of Grey Residents Working in Grey	**30,075**	**30,695**	**2.1%**
Other Workplace	7,170	8,165	13.9%
No fixed workplace	3,355	4,300	28.2%
Total Employed by Place of Residence	**40,600**	**43,160**	**6.3%**
Total Employed by Place of Work	**34,860**	**35,205**	**1.0%**
Jobs in Destination Counties	**935,825**	**1,115,200**	**19.2%**

Source: Statistics Canada, 1996 and 2001 and C4SE

The County of Grey is home to almost 8,000 workers who commute to jobs outside of the County each day.

A review of 2001 employment by place of work data indicates that about 29% of Grey residents commuted outside of the County of Grey for work. As shown in *Figure 2.6*, about 5% of employed residents commuted to Bruce County, the largest work destination, while just over 4% commuted to Simcoe County. These trends demonstrate that employment growth in surrounding municipalities will have an influence on the number of residents locating in and commuting from the County of Grey in the future.

Figure 2.7: Employment by Place of Work, 2001



Source: Statistics Canada, 2001 and C4SE

Commuting patterns for the County's area municipalities are presented in Appendix D.

3.0 GROWTH PROJECTIONS

This Section provides details on the permanent population, employment, and household projections for the County of Grey to 2031.

3.1 Economic Base Employment Projections

The County of Grey's economy will shift as a result of changes in employment and productivity in its dominant industries. The following subsections examine the influence employment growth and an increase in commuters will have on net migration in Grey.

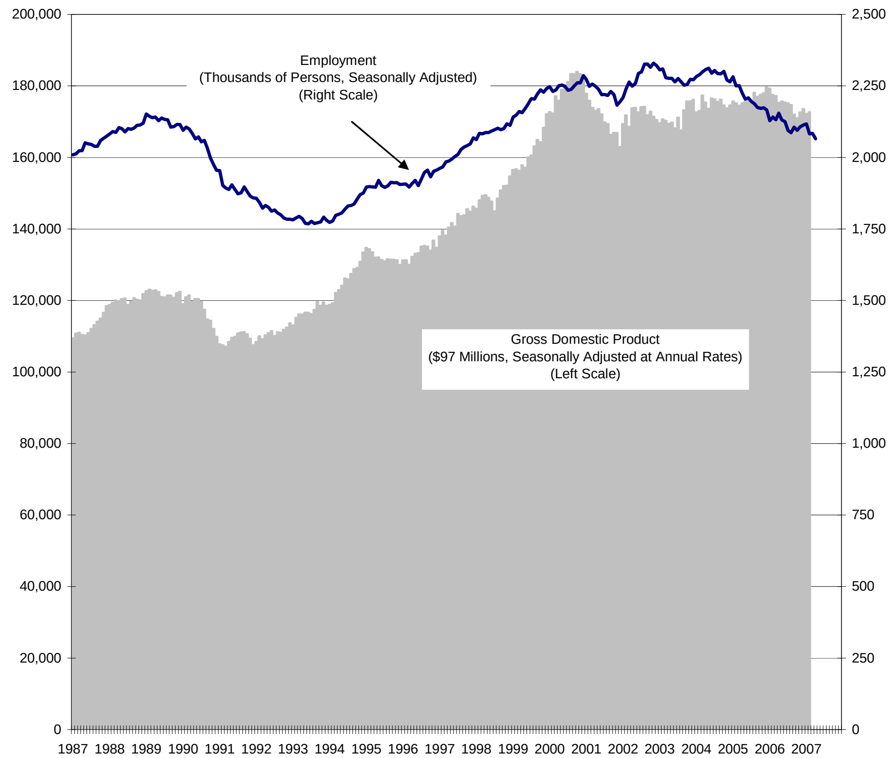
3.1.1 Primary and Manufacturing Employment

Employment in Ontario's manufacturing and primary sectors is projected to decline as productivity increases.

Over half of the County of Grey's economic base employment is in industrial industries, primarily manufacturing, and about a quarter is in primary industries, in particular agriculture. These two industries are the key drivers of Grey's economy and both face similar futures. While output in both industries is expected to grow in constant dollar terms, employment is expected to decline because of productivity growth. *Figures 3.1* and *3.2* illustrate the path of output, employment and productivity in Ontario's manufacturing sector over the last two decades. Our projections for Ontario show that employment in the manufacturing sector is currently levelling off, and that it will decline in the future. Our projections for the primary sector suggest that employment will continue to decline in that sector, as it has for the last two decades.

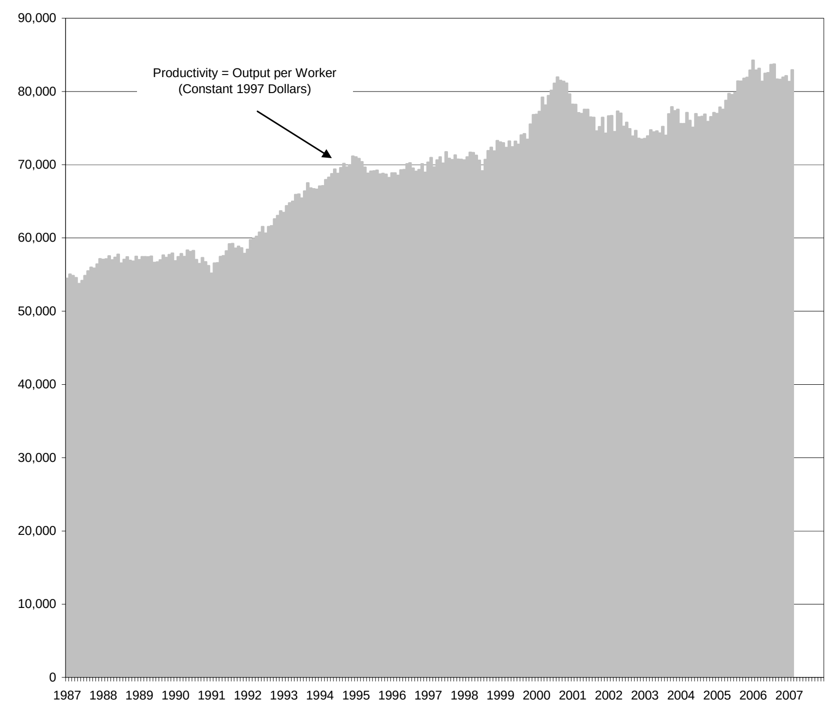
Communities can no longer expect the primary and manufacturing sectors to fuel community employment and population growth the way they did throughout the 1950s to 1980s. Thus, even while manufacturing and primary industries continue to prosper, they cannot be expected to expand the County of Grey's economic base employment.

***Figure 3.1: Ontario Manufacturing Output and Employment, January 1987 to March 2007** (Seasonally Adjusted)*



Source: Statistics Canada and C4SE

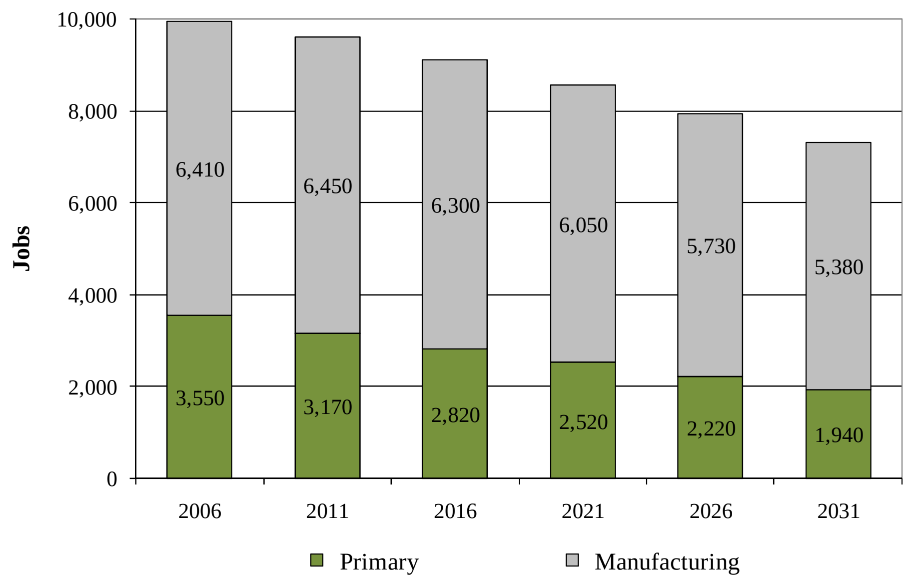
***Figure 3.2 - Ontario Manufacturing Productivity, January 1987 to March 2007** (Seasonally Adjusted)*



Source: Statistics Canada and C4SE

We see limited opportunities for the expansion of the County of Grey's economic base in either primary or manufacturing industries. The growth projections assume that primary and manufacturing employment in the County of Grey will gradually decline at the pace projected for primary and manufacturing employment in Ontario as a whole. By 2031, the County of Grey is expected to accommodate approximately 5,380 manufacturing jobs and 1,940 primary jobs, as demonstrated in *Figure 3.1*.

Figure 3.3: Primary and Manufacturing Employment Projections, 2006 to 2031



Source: C4SE

3.1.2 Tourism, Seasonal Resident, and Retiree Employment

An increase in tourism, seasonal residents, and retirees is expected to generate considerable job growth in the County of Grey in the future.

The location quotient analysis demonstrated the County of Grey's relative strength in tourism compared to that of Ontario. In 2001, 13% of Grey's jobs in this industry were considered to be export based. It is anticipated that job growth in retail trade; arts, entertainment and recreation; accommodation and food services; other personal services; health and social services; and construction will continue to increase as tourists, seasonal residents, and retirees continue to visit or move to the County.

Tourists in this analysis include people visiting the area and staying in temporary accommodations (a hotel, resort, camp site); seasonal residents staying in cottages or time-share units that they own or rent; and, friends and relatives visiting both permanent and seasonal residents. Retirees settling in the area are often former seasonal residents. Retirees and their dependents moving to any community have the same impact on the local economy as new employees and their dependents since they both help to expand the community base. Retirees and their dependents spend their incomes on food, clothing, gasoline, personal services, entertainment and recreation. The jobs required to support tourist, seasonal resident, and retirees is termed *TSR employment*.

It is assumed that TSR economic base employment in the County of Grey will grow at an annual rate of 2.3%, which is equal to the average rate of growth projected for the population over 45 in London, Kitchener, Guelph and the Greater Toronto Area. At this rate of growth, TSR employment is expected to increase from 3,210 jobs in 2006 to 4,850 in 2031. The projected increase in TSR economic base employment to 2031 is illustrated in *Figure 3.4*.

Figure 3.4: Tourism, Seasonal Resident, and Retiree (TSR) Employment Projections, 2006 to 2031

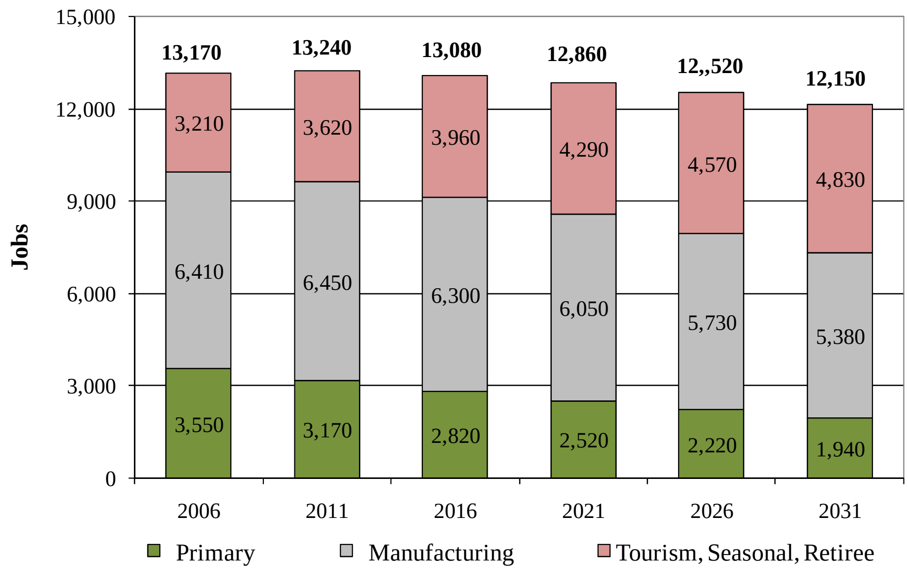
Source: C4SE

3.1.3 Implications for Net-Migration

Grey's economic base will shift as the share of employment in the County's primary and manufacturing industries declines and TSR increases.

As employment in Grey's primary and manufacturing industries decline, TSR economic base employment will continue to increase. But as *Figure 3.5* demonstrates, projected job gains in TSR economic base employment are not enough to offset job losses expected in agriculture and manufacturing. The County of Grey's economic base employment is projected to decline by about 1,020 jobs between 2006 and 2031.

Figure 3.5: County of Grey's Economic Base Employment Projections, 2006 to 2031



Source: C4SE

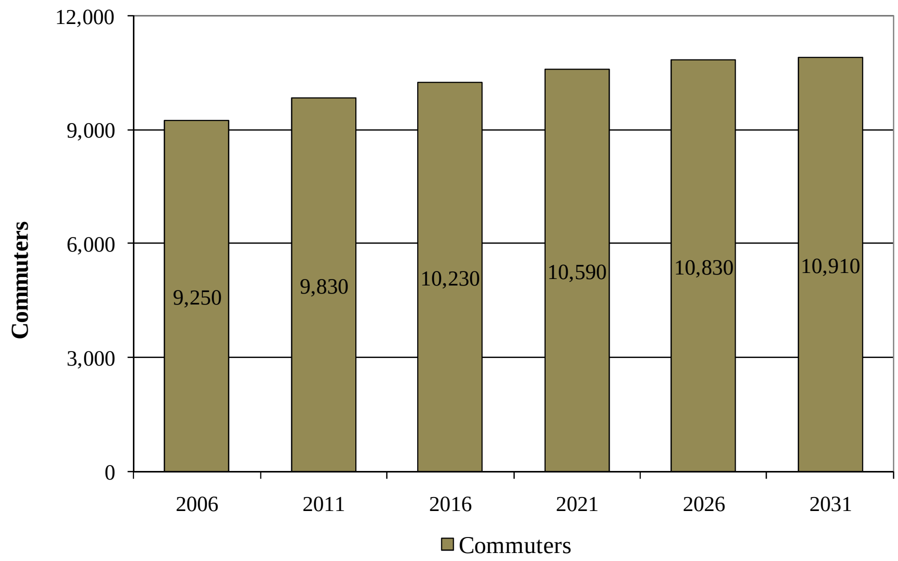
3.2 Influence of Commuter Growth

Job growth in nearby municipalities will influence population growth in the County of Grey.

Besides economic base employment, an important consideration for determining future growth opportunities in the County of Grey relates to the proportion of residents who commute outside of the municipality for work. In 2001, about a quarter of Grey's employed labour force worked at jobs located outside of the County. It is expected that this trend will continue.

It is assumed that Grey's commuter base will grow at an annual rate of 1.1%, which is equal to the average rate of employment growth projected for the Toronto, Kitchener, Guelph, London, and Barrie areas. The projected increase in Grey's commuter growth is demonstrated in *Figure 3.6*. It is assumed that by 2031 approximately 10,910 Grey residents will commute outside of the County for work.

Figure 3.6: Projected Number of Residents Commuting from Grey to Jobs Outside the County, 2006 to 2031



Source: C4SE

3.3 Population Projections

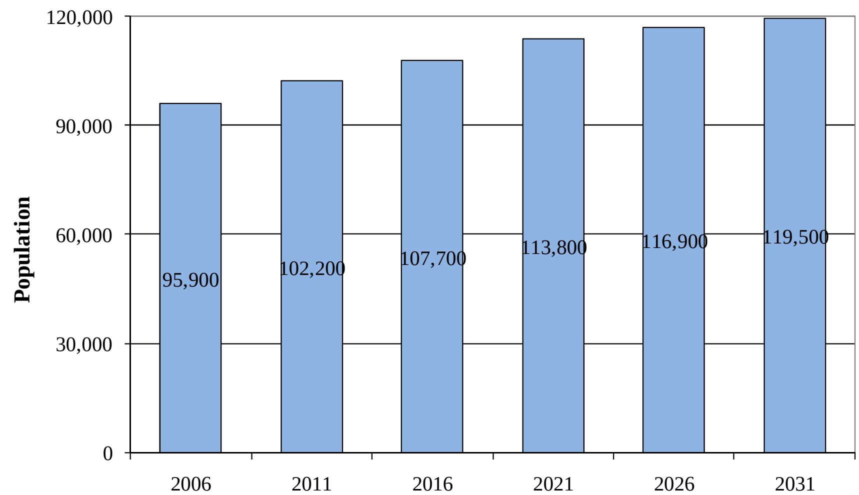
Grey's population will grow by 23,800 residents between 2006 and 2031.

Economic base workers, commuters and their dependents will require community services, resulting in growth in the number of community base jobs and workers and their dependents.

In-migration to Grey to 2031 has been calculated based on future economic base projections and the influence of commuter growth. In-migration to the County of Grey among persons 55 and over is assumed to reflect rates prevailing over the last four years by age and gender from London, Kitchener, Guelph, and the Greater Toronto Area. In-migration among persons under 55 is driven by local labour market requirements plus in-commuting. Out-migration of persons of all ages is assumed to reflect rates prevailing over the last four years by age and gender relative to Grey's own population base.

Under these assumptions, the population in the County of Grey will grow from 95,900 in 2006 to 119,500 in 2031, an increase of approximately 23,600 residents.

Figure 3.7: County of Grey Population Projections, 2006 to 2031



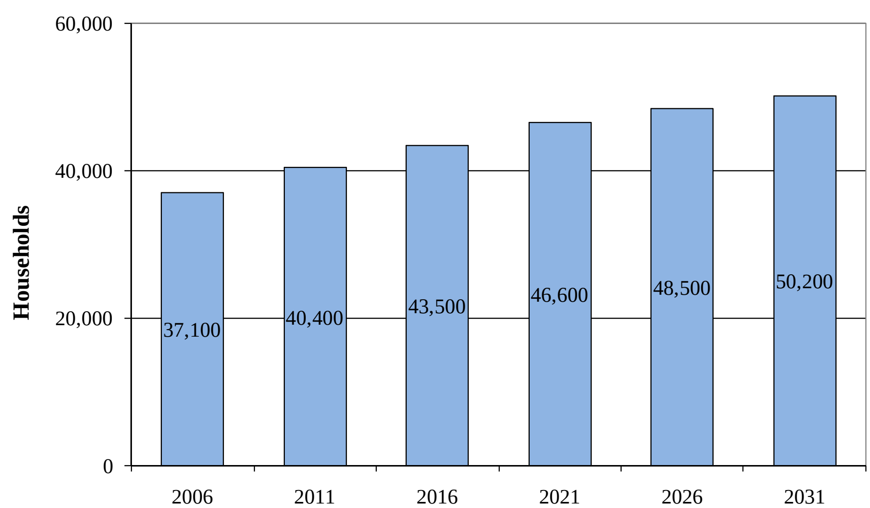
Source: C4SE

3.4 Household Projections

The County of Grey will grow by about 13,300 households between 2006 and 2031.

The number of households in the County of Grey is expected to increase from 37,100 in 2006 to 50,200 in 2031, an increase of 13,100 households. Household projections are presented in *Figure 3.8*.

Figure 3.8: County of Grey Household Projections, 2006 to 2031



Source: C4SE

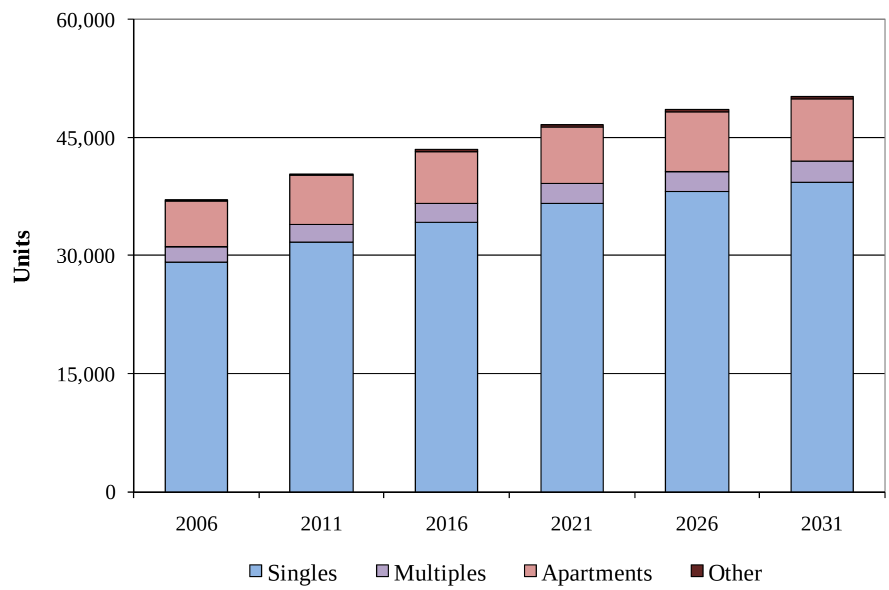
Further details on County-wide projections are presented in Appendix E.

3.5 Dwellings by Unit Type

The dominant housing form will be singles.

Dwelling unit by type projections for the County of Grey over the forecast period are based on 2006 age specific headship rates, tenure, and propensity data. Based on the population projections by age group, over three-quarters of the additional dwellings required between 2006 and 2031 will be singles. By comparison, about 5% of growth will be in multiples and 16% apartments. There will also be a demand for a small proportion of other units, which includes mobile homes. *Figure 3.9* presents the findings of the analysis.

Figure 3.9: County of Grey Dwelling Projections by Unit Type, 2006 to 2031



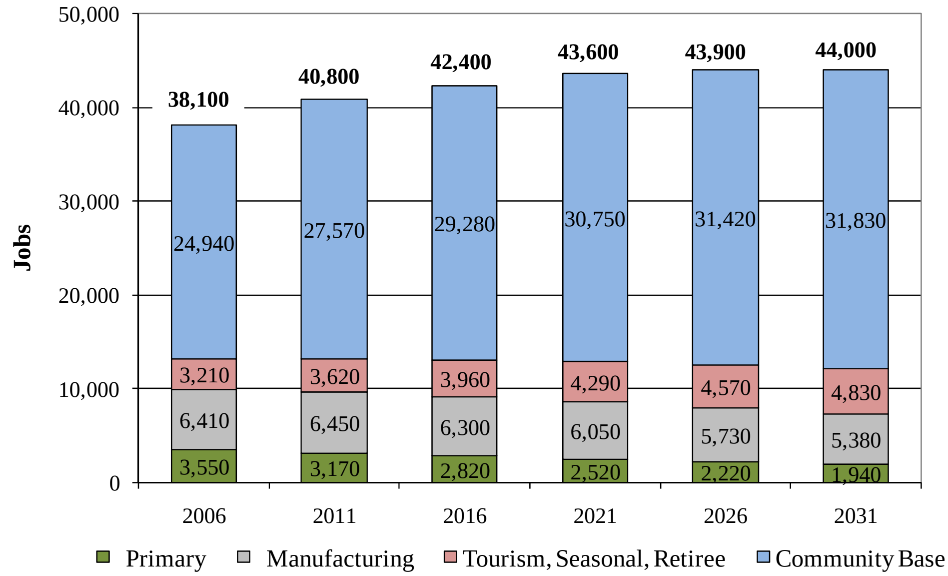
Source: C4SE and MGP

3.6 Employment by Place of Work Projections

The County of Grey's employment is projected to increase from 38,100 in 2006 to 44,000 in 2031.

Total employment by place of work (including both economic and community base employment) is projected to increase from 38,100 in 2006 to 44,000 by 2031. While the number of jobs in the County will remain relatively stable after 2021, the types of employment will change. Community base employment is expected to represent an increasing share of total employment in the County of Grey over the forecast period. In 2006, approximately 65% of the jobs in Grey were community base jobs. This share is projected to increase to 72% by 2031 as the share of economic base employment declines. Employment projections are presented in *Figure 3.10.*

Figure 3.10: County of Grey Employment Projections, 2006 to 2031



Source: C4SE
Note: Projections do not include "No Fixed Workplace" employment

3.7 Comparison of Projections

The projection methodology used in this analysis reasonably reflects current development trends and the future economic prospects of the County of Grey.

Growth projections to 2026 were prepared by Hemson Consulting as part of the County of Grey Development Charges Background Study dated May 2006. The forecasts developed in that analysis were more conservative than the projections presented in this report. Total population for the County was projected to be 102,400 by 2026, permanent households were projected at 45,100, and employment was projected at 45,060.

The forecast methodology used in the Development Charge Background Study differed significantly from the approach used in this analysis. The following points summarize the method used by Hemson Consulting to generate the 2026 growth forecasts.

- The population forecast was prepared using a standard cohort survival model. Fertility and mortality rates were based upon the most recent five year average. Net-migration assumptions were based on the amount of net migration experienced between 1996 and 2001 and growth levels and housing construction between 2001 and 2006.

- The number of permanent households was established using adjusted 2001 age specific headship rates applied to the forecast population.
- The employment forecast was based on an assumption that the 2001 activity rate of 44% in the County of Grey was maintained over the forecast period.

While the forecasting method employed by Hemson Consulting is a standard approach to projecting growth, it relies heavily on historic trends. The County of Grey's area municipalities have expressed concerns with this type of approach because it may not fully reflect more recent conditions and does not address the future economic prospects of the area.

The methodology employed in this analysis explicitly considers employment trends in the County's major industries, the influence of commuters, and retirement trends to generate population and household forecasts. In our opinion, this approach reasonably reflects the growth and development prospects shaping the County's future.

4.0 Allocations

This Section provides population, employment, and household allocations to the County of Grey's area municipalities. The projections are concerned with permanent population and households and do not address seasonal growth.

4.1 Population Allocations

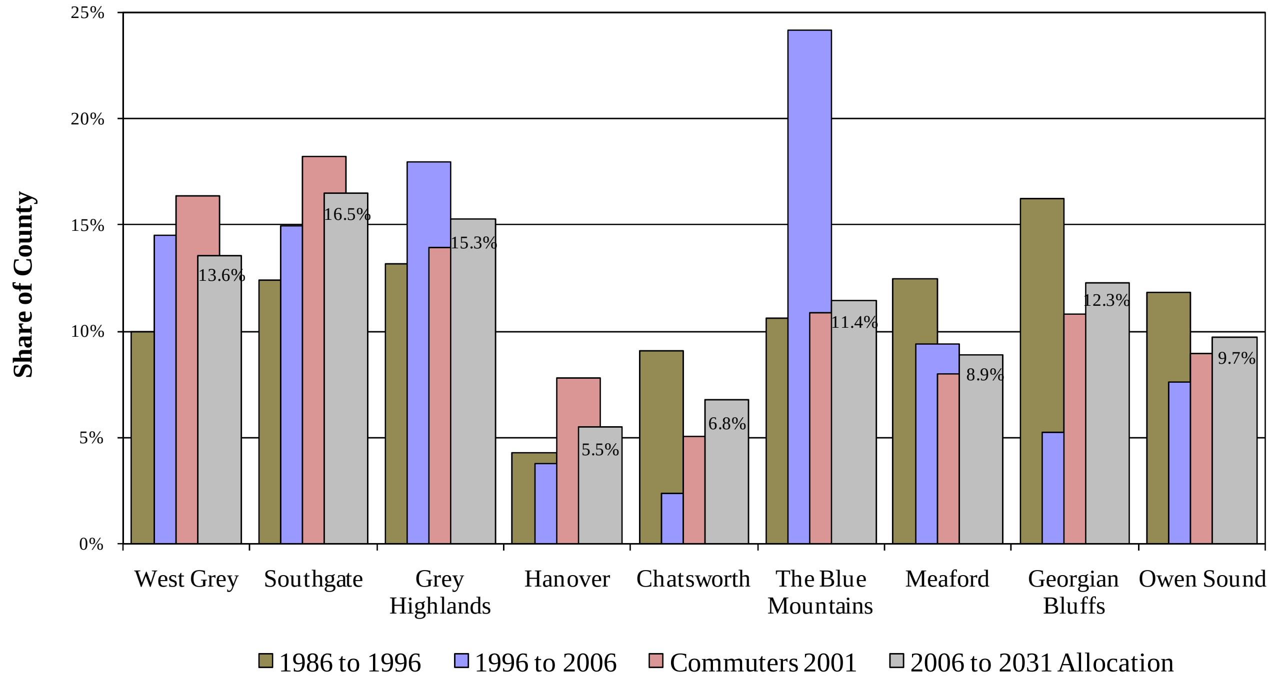
Population allocations are based on the projected economic prospects of each area municipality.

Growth projections for the County of Grey assume a decline of economic base jobs but an increase in the number of commuters residing in the County. Growth allocations to area municipalities reflect similar trends. Population growth by area municipality reflects the relative shares of the current commuter population and population growth shares achieved by each municipality over the last two decades (1986 to 1996 and 1996 to 2006).

As demonstrated in *Figure 4.1*, Hanover has accommodated less than 5% of the County of Grey's population growth over the last twenty years. The share of the County's population growth accommodated in Chatsworth, Meaford, Georgian Bluffs, and Owen Sound was lower between 1996 and 2006 than from 1986 to 1996. By comparison, West Grey, Southgate, Grey Highlands, and The Blue Mountains have accommodated a higher share of population growth in the last 10 years than the 10 year time period prior. With respect to commuters, Southgate, West Grey, and Grey Highlands had the highest shares of residents working in other County's in 2001 at 18%, 16%, and 14% respectively.

Each area municipality's share of the County of Grey's population growth to 2031 is presented in the same figure. Southgate is projected to accommodate the highest share of growth at 16.5% while Hanover is expected to accommodate the lowest at 5.5%.

Figure 4.1: Area Municipalities' Projected Shares of the County's Population Growth Compared to Historic Trends



Source: C4SE

The resulting population allocations are presented in *Figure 4.1*. Southgate, The Blue Mountains, and Grey Highlands are projected to experience the highest gains in population share between 2006 and 2031 at 1.5%, 1.1%, and 0.8% respectively. West Grey, Hanover, Chatsworth, Meaford and Georgian Bluffs will experience only slight differences in their shares of County-wide population in 2031 compared to 2001. While Owen Sound is expected to continue to have the highest population in the County in 2031, it will accommodate about 21% of the County's population, down from 24% in 2006.

Table 4.1: Population by Area Municipality, 2006 and 2031

	2006		2031		Growth 2006 to 2031	
	Population	**County Share**	**Population**	**County Share**	**Population**	**County Share**
West Grey	12,700	13.2%	15,900	13.3%	3,200	13.6%
Southgate	7,500	7.8%	11,400	9.5%	3,900	16.5%
Grey Highlands	9,800	10.2%	13,400	11.2%	3,600	15.3%
Hanover	7,400	7.7%	8,700	7.3%	1,300	5.5%
Chatsworth	6,600	6.9%	8,200	6.9%	1,600	6.8%
The Blue Mountains	7,000	7.3%	9,700	8.1%	2,700	11.4%
Meaford	11,400	11.9%	13,500	11.3%	2,100	8.9%
Georgian Bluffs	10,900	11.4%	13,800	11.5%	2,900	12.3%
Owen Sound	22,600	23.6%	24,900	20.8%	2,300	9.7%
County of Grey	**95,900**	**100.0%**	**119,500**	**100.0%**	**23,600**	**100.0%**

Source: C4SE

4.2 Household Allocations

The growth in area municipalities' households over the forecast period reflect local demographic trends.

The number of households projected for each area municipality is based on 2006 Census persons per unit with the assumption that these will decrease slightly over the forecast period. As demonstrated in *Table 4.2*, three of Grey's nine area municipalities will accommodate about 1,800 to 1,900 new households over the forecast period. Southgate and Owen Sound are projected to experience the greatest absolute growth in households with the addition of 1,900 households over the forecast period. By comparison, both Chatsworth and Hanover are projected to experience the lowest absolute growth with 800 additional households each by 2031.

Table 4.2: Households by Area Municipality, 2006 to 2031

	2006		2031		Growth 2006 to 2031	
	Households	**County Share**	**Households**	**County Share**	**Households**	**County Share**
West Grey	4,700	12.7%	6,400	12.7%	1,700	13.0%
Southgate	2,600	7.0%	4,500	9.0%	1,900	14.5%
Grey Highlands	3,700	10.0%	5,500	11.0%	1,800	13.7%
Hanover	3,000	8.1%	3,800	7.6%	800	6.1%
Chatsworth	2,400	6.5%	3,200	6.4%	800	6.1%
The Blue Mountains	2,900	7.8%	4,200	8.4%	1,300	9.9%
Meaford	4,400	11.9%	5,600	11.2%	1,200	9.2%
Georgian Bluffs	4,000	10.8%	5,700	11.4%	1,700	13.0%
Owen Sound	9,400	25.3%	11,300	22.5%	1,900	14.5%
County of Grey	**37,100**	**100.0%**	**50,200**	**100.0%**	**13,100**	**100.0%**

Source: C4SE

4.3 Employment By Place of Work Allocations

Employment allocations are based heavily on the need for community base jobs required to support a growing population.

Employment growth by place of work over the forecast period is based heavily on projected shares of population growth, as most jobs created in the County over the 2006 to 2031 period will be community based jobs. As demonstrated in *Table 4.3*, Southgate is projected to experience the highest gain in the County's share of employment growth at 0.9% while Owen Sound's share will decrease by 2.4%.

Table 4.3: Employment by Place of Work by Area Municipality, 2006 and 2031

	2006		2031		Growth 2006 to 2031	
	Employment	County Share	Employment	County Share	Employment	County Share
West Grey	3,870	10.2%	4,590	10.4%	720	12.3%
Southgate	1,980	5.2%	2,690	6.1%	710	12.2%
Grey Highlands	3,870	10.2%	4,590	10.4%	720	12.3%
Hanover	4,870	12.8%	5,400	12.3%	530	9.1%
Chatsworth	1,490	3.9%	1,790	4.1%	300	5.1%
The Blue Mountains	2,980	7.8%	3,690	8.4%	710	12.2%
Meaford	3,080	8.1%	3,600	8.2%	520	8.9%
Georgian Bluffs	2,580	6.8%	3,190	7.3%	610	10.4%
Owen Sound	13,400	35.2%	14,420	32.8%	1,020	17.5%
County of Grey	**38,120**	**100.0%**	**43,960**	**100.0%**	**5,840**	**100.0%**

Source: C4SE

4.4 Servicing Considerations

Uncommitted water and wastewater treatment facility reserve capacities vary significantly across the County.

The allocation of growth to area municipalities was made with some consideration given to water and wastewater treatment facility reserve capacity. *Table 4.4* provides details on treatment facility reserve capacity beyond that which has been committed for unconnected approved lots (where provided). The review demonstrates the broad range in availability of reserve capacity as well as current initiatives to increase capacity among the County's area municipalities.

While servicing was reviewed as part of this analysis, allocation decisions were ultimately made independently of local municipal reserve capacities. This approach is premised on the view that the local municipalities are the operating authorities and that it would be inappropriate for County level decisions to precede local consideration of the merits and economics of any necessary plant expansions.

Given such consideration and local municipal decisions that they do not wish to invest in added treatment capacity to accommodate growth, population and/or employment allocations could be adjusted accordingly at the next five year review of the Official Plan.

Table 4.4: Reserve Capacity in Water and Wastewater Treatment Facilities in the County of Grey

	Water Treatment Factility			Wastewater Treatment Factility			Expansion Plans
	Reserve Capacity m3/day	**Reserve Capacity** Units	**Reserve Capacity** Percent of Design Capacity	**Reserve Capacity** m3/day	**Reserve Capacity** Units	**Reserve Capacity** Percent of Design Capacity	
West Grey* (2006)							
Durham	-	-	16% - 77% for different wells	-	-	49%	-
Neustadt	-	-	66% - 85% for different wells	-	-	35%	-
Southgate - *Dundalk* (Water - December 2005/ Wastewater December 2006)	1,173	648	42%	499	340	27%	No short or medium term expansion plans, however, development charges update indicated a new sewage treatment plant in about 15 or 20 years
Grey Highlands - *Markdale* (2006)	1,780	1,424	48%	-	-	0%	New development will require wastewater treatment expansion and additional lift pumps
Hanover (December 2006)	7,121	3,414	62%	1,632	1,115	26%	Plan to increase water treatment capacity from 11,517 to 16,750 cu.m/day with plant upgrade by December 31, 2009.
Chatsworth (Year End 2006)							
Walters Falls	660	*360*	*85%*	*No Wastewater Services*			-
Chatsworth	255	*104*	*31%*	*No Wastewater Services*			-
The Blue Mountains (June 2007)							EA process underway for wastewater treatment plant expansions in both service areas.
Craigleith	-	759	-	-	4,633	-	
Thornbury				-	-145	-	
Meaford* (Year End 2006)	24,498	27,810	91%	-	324	27%	Currently in the EA process to increase capacity of waste water treatment plant to accommodate additional growth. Infiltration and Inflow works currently underway.
Georgian Bluffs - *Cobble Beach*	-	20	-	631	574	32%	Upgrades to East Linton water system, including the construction of a water tower which will have capacity for 1,500 units of which 1,220 will be reserved for Cobble Beach.
Owen Sound (September 2006)	13,972	7,989	51%	9,999	4,975	41%	-

Source: Compiled by MGP based on area municipal data.
Note: Reserve capacity in this table is beyond commitments approved unbuilt or unconnected lots. Reserve Capacity for West Grey does not take into account committed lots. For Meaford, the Wastewater Treatment Facility Reserve Capacity does not take into account committed lots.

4.5 Seasonal Units

Current applications and approved Secondary Plans will yield an estimated 3,570 additional seasonal dwellings within the forecast period.

As noted previously, the growth forecasts and allocations address permanent population and employment growth. This is not intended to deny the importance or impact of recreational development to the County and some of its local municipalities, but more to keep the focus on the accommodation of primary residential growth. That said, it is evident that the County can expect significant development of seasonal recreational development into the future. If the difference between occupied and unoccupied dwellings is indicative of the proportion of seasonal dwellings in a municipality, expectations for seasonal dwelling growth can be extrapolated assuming the relationship is maintained into the future. The amount of seasonal development that could be expected in each of the area municipalities under this assumption is presented in *Table 4.4*.

Table 4.5: Seasonal Dwellings by Area Municipality, 2006 to 2031

	2006 to 2031 Household Growth	Proportion of Unoccupied Dwellings 2006	Assumed Seasonal Proportion	Additional Seasonal Dwellings
West Grey	1,700	10.4%	5.4%	90
Southgate	1,900	8.5%	3.5%	70
Grey Highlands	1,800	28.3%	23.3%	420
Hanover	800	4.6%	-	-
Chatsworth	800	13.7%	8.7%	70
The Blue Mountains	1,300	47.7%	-	4,740
Meaford	1,200	14.5%	9.5%	110
Georgian Bluffs	1,700	14.3%	9.3%	160
Owen Sound	1,900	3.6%	-	-
County of Grey	**13,100**	**-**	**-**	**5,660**

Source: MGP

Note: With the exception of The Blue Mountains, Additional Seasonal Dwellings was calculated based on the 2006 ratio of unoccupied to total dwellings for each area municipality. In the case of The Blue Mountains, seasonal dwelling estimates are based on the municipality's Development Charge Background Study.

By comparison, *Table 4.6* shows current expectations of future development based on seasonal units in Plans of Subdivision or Condominium or approved secondary plan.

Table 4.6: Pending and Approved Seasonal Dwellings by Area Municipality, 2007

	Seasonal Dwellings
Grey Highlands	300
The Blue Mountains	2,830
Meaford	40
Georgian Bluffs	400
Total	**3,570**

Source: MGP

5.0 LAND SUPPLY AND DEMAND ANALYSIS

Future residential, employment, and other land use development in the County of Grey will occur both within designated urban areas, hamlets, and in rural locations. Recognizing both the efficiencies and environmental benefits of compact development, planning policies increasingly encourage growth to locate in designated settlement areas. This section provides details on the supply and demand balance for urban, hamlet, and rural land in the County of Grey to 2031 to determine if there is a sufficient supply of vacant land or if settlement boundaries must be expanded.

5.1 Land Supply Analysis

A County-wide vacant land inventory was prepared to quantify the supply of vacant land by area municipality. Vacant properties were identified using MPAC property codes, area municipality vacant land inventories, and through the manual selection of some properties with an urban designation. Vacant properties were classified as Urban, Urban Fringe, Hamlet, or Rural based on current County Official Plan designations. Urban properties were further classified by land use, including Residential, Employment, and Future Development, based on local Official Plan designation. The analysis took into consideration development constraints as a result of natural and built features.

Table 5.1 provides a summary of the results. It should be noted that gross vacant designated land excludes environmentally significant lands and their buffers, existing roads and applicable buffers, and existing built features. Details of the analysis are presented in Appendices F and G.

Table 5.1: Supply of Vacant Land in the County of Grey

	Urban Residential (gross hectares)	**Urban Employment** (gross hectares)	**Future Development** (gross hectares)	**Urban Fringe** (gross hectares)	**Hamlet** (gross hectares)	**Rural** (Total Parcels)
West Grey	27.9	11.2	146.2	804.6	261.1	1,300
Durham	*23.0*	*1.7*	*0.0*	*350.8*	*0.0*	*0*
Neustadt	*4.9*	*9.5*	*146.2*	*0.0*	*0.0*	*0*
Other West Grey	*0.0*	*0.0*	*0.0*	*453.8*	*261.1*	*1,300*
Southgate	66.1	3.8	41.8	0.0	53.9	837
Grey Highlands	24.2	43.7	0.0	51.9	327.2	1,353
Hanover	41.2	99.0	102.8	0.0	0.0	0
Chatsworth	0.0	0.0	0.0	0.0	139.6	973
The Blue Mountains	524.3	28.8	31.7	0.0	20.9	410
Thornbury/Clarksburg	*37.1*	*28.8*	*31.7*	*0.0*	-	-
Other The Blue Mountains	*487.2*	-	-	-	*20.9*	*410*
Meaford	98.5	20.6	0.0	379.0	55.1	1,265
Georgian Bluffs	0.0	10.0	0.0	0.0	125.8	1,590
Owen Sound	67.5	166.0	0.0	0.0	0.0	0
Total	**849.7**	**383.0**	**322.5**	**1,235.5**	**983.4**	**7,728**

Source: MGP

Note: The supply of Urban Residential land in Other The Blue Mountains (Craigleith, Camperdown, Castle Glen, Swiss Meadows, Grandview, Lora Bay, and Osler) was calculated using summary tables presented in Official Plan Schedule B – Unit Yields minus properties in the planning process. This entry does not exclude Built and Natural Constraints areas.

5.2 Residential Land Needs Analysis

Dwelling demand over the forecast period will be satisfied by units currently in the planning process and the unit potential available on vacant land. The following analysis considers the number of residential units that can be accommodated on designated Urban, Hamlet, and Rural lands (ie. existing lots of record) and compares the supply to demand estimates to test the sufficiency of supply.

5.2.1 Urban Areas

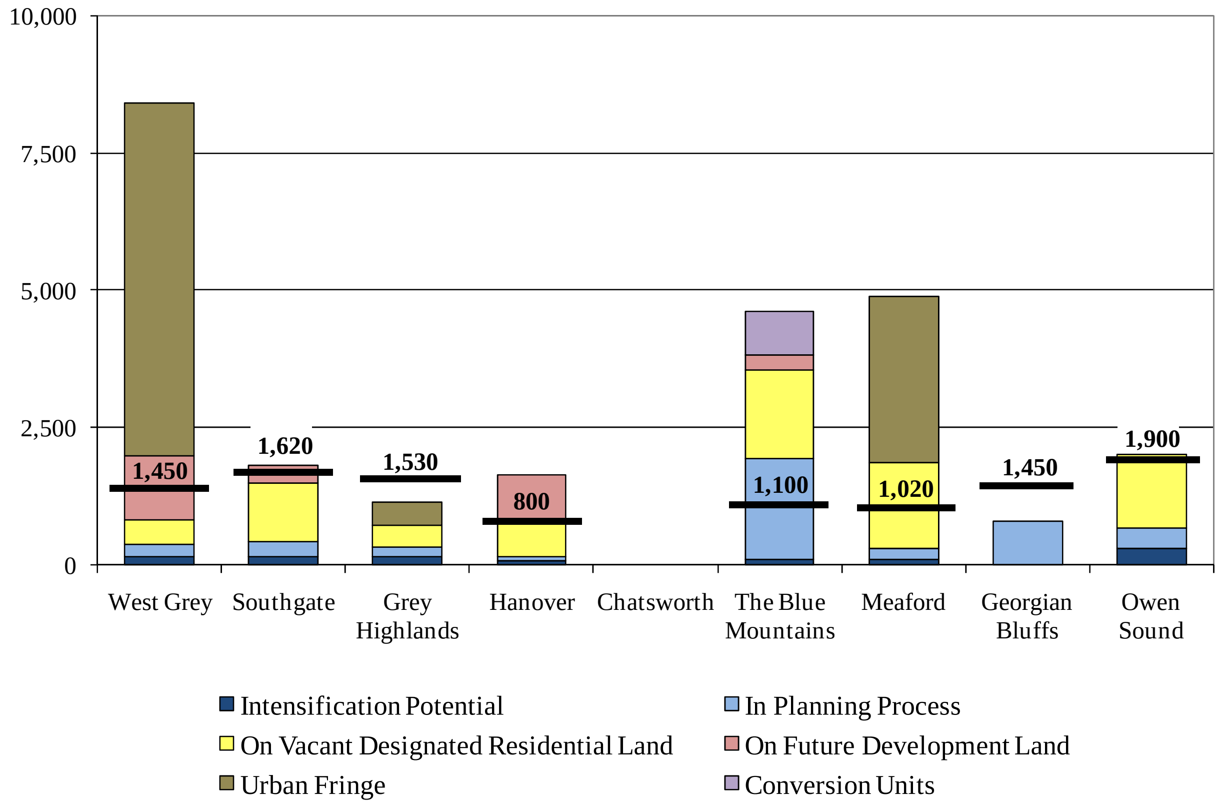
Some area municipalities have a large oversupply of vacant residential land while others have an insufficient amount to pass a conservative urban residential land supply test.

To test the sufficiency of the supply of vacant Urban residential land, ambitious assumptions were made about the upper limit of growth that could be expected to locate in the County's Urban areas between 2006 and 2031. As detailed in *Appendix F.2*, 100% of Hanover and Owen Sound, 0% of Chatsworth, and 85% of the other area municipalities' residential growth was directed to Urban land for this test. It was assumed that the demand for residential units could be satisfied by:

- Units created through intensification of the existing built-up area;
- Units in the planning process;
- Units on vacant designated Residential land;
- Units on vacant Future Development land;
- If required, units on vacant Urban Fringe land; and,
- In the case of The Blue Mountains, through the conversion of seasonal dwellings to permanent units.

Figure 5.1 illustrates the findings of the analysis. It demonstrates that some area municipalities have a sufficient amount of vacant Urban residential land to accommodate a significant proportion of future growth while others have a more limited supply and do not pass the conservative test.

Figure 5.1: Urban Permanent Residential Unit Supply and Demand Test



Source: MGP

The following points summarize the findings of the Urban residential land needs analysis by area municipality:

- Hanover and Owen Sound have a sufficient amount of residential units through intensification, in the planning process, or on vacant designated residential land to accommodate 100% of projected future permanent residential demand.
- The Blue Mountains and Meaford have a sufficient amount of residential units through intensification, in the planning process, or on vacant designated residential land to accommodate 85% of projected future permanent residential demand.
- While West Grey has a sufficient amount of Urban land to accommodate 85% of future residential growth, a portion of it will have to be on Future Development or Urban Fringe land. All of the Future Development land identified in that municipality is located in Neustadt, the smaller of the municipality's two urban areas. The results of the analysis suggest that if Durham is to remain the dominant urban area, some of Durham's Urban Fringe land may have to be designated Urban residential.

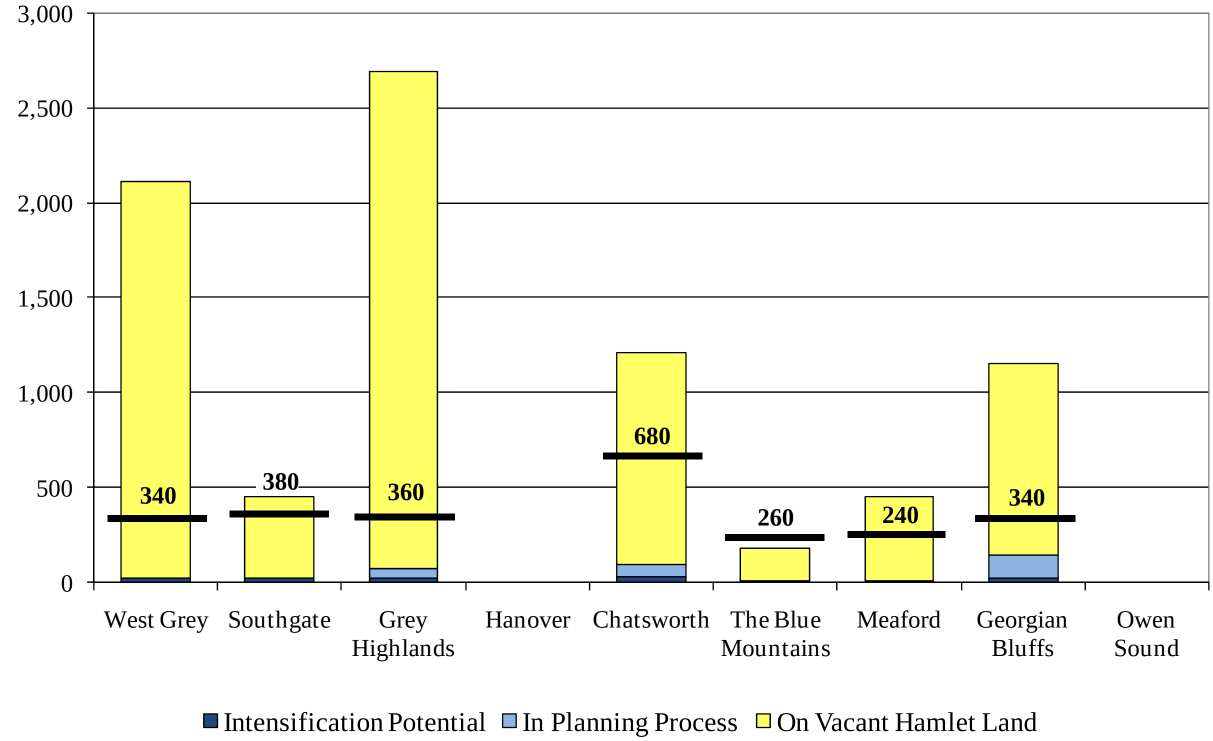
- While Southgate has a sufficient amount of Urban land to accommodate 85% of future residential unit demand, a portion of the area municipality's Future Development land would have to be designated to residential in the local Official Plan.
- There is not a sufficient amount of unit potential in Grey Highland's sole fully-serviced Urban area, Markdale, to accommodate 85% of the area municipality's future unit growth, even with the consumption of Urban Fringe land on the Grey Highland side of the community. To be able to accommodate a larger proportion of unit growth, a boundary adjustment in West Grey around Markdale may be required.
- Georgian Bluffs Urban area, which consists of the Cobble Beach development, does not have a sufficient amount of permanent unit potential to accommodate 85% of future permanent residential unit growth. Given the unit potential in Hamlets and on Rural land, and given the history of unit growth in Rural vs. Settlement areas, the supply of units in Cobble Beach should be sufficient to accommodate future urban growth.

5.2.2 Hamlets

There is a sufficient amount of Hamlet land in Grey to pass a conservative hamlet residential land supply and demand test.

A similar analysis was carried out for Hamlets. As detailed in *Appendix F.3*, 85% of Chatsworth, 0% of Hanover and Owen Sound, and 20% of the other area municipalities' residential growth was directed to Hamlet land for this test. Except for The Blue Mountains, all other area municipalities have a sufficient amount of vacant Hamlet land to accommodate high estimates of demand. The results of the analysis are depicted in *Figure 5.2*.

Figure 5.2: Hamlet Permanent Residential Unit Supply and Demand Test



Source: MGP
Note: Analysis includes Hamlets as currently defined in the County of Grey Official Plan.

The following points summarize the findings of the Hamlet land needs analysis by area municipality:

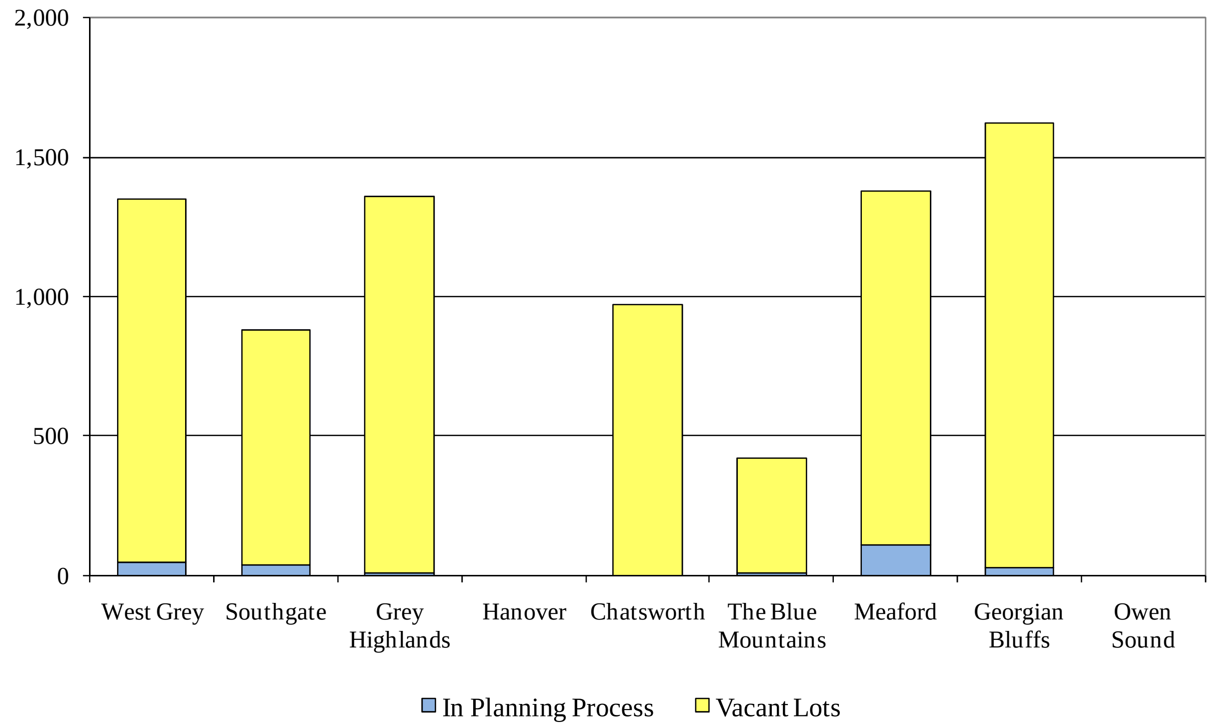
- There is a sufficient amount of residential units in the planning process or on vacant designated Hamlet land to accommodate tested growth in Hamlets in all area municipalities except The Blue Mountains.
- Despite the fact that The Blue Mountains is short 80 units from meeting its 20% test target, we do not believe additional Hamlet land is required in the area municipality given the significant oversupply of units in the municipality's urban areas and the history of growth locating in those areas.

5.2.3 Rural

There is a large amount of unit potential outside of Grey's Urban areas and Hamlets.

In addition to the unit potential available in Urban areas and Hamlets, there is a significant amount of potential for additional units on existing lots of record in rural areas. The large unit potential outside of settlement areas makes it challenging to direct growth exclusively to the County's Urban areas and Hamlets. The total supply of existing lots of record amounts to 7,730 lots in the County. The supply of rural lots by area municipality is illustrated in *Figure 5.3*.

Figure 5.3: Rural Permanent Residential Unit Supply



Source: MGP

5.3 Settlement Residential Growth Targets

There is a sufficient amount of unit supply in each of Grey's area municipalities to meet Settlement growth targets.

The growth management strategy establishes targets for Settlement growth. Settlement areas are defined as the County's Urban and Hamlet designations. Non-settlement areas are lands with all other designations. We expect to retain the Urban Fringe designation, however, it will be renamed Settlement Fringe (see Growth Management Strategy Report).

The lands needs analysis to this point has tested the upper limit of permanent residential unit growth that could locate within Urban areas and Hamlets to 2031 to test the sufficiency of supply given aggressive estimates of Urban and Hamlet growth. The historic trend, however, has been for residential unit growth to locate predominantly in rural areas. *Table 5.2* provides a summary of Census data that demonstrates that the majority of Total Dwelling growth in Grey between 2001 and 2006 has been in the rural areas.

Table 5.2: Comparison of Urban and Rural Dwelling Growth, 2001 to 2006

	Total Dwellings 2001	Total Dwellings 2006	Absolute Difference 2001 to 2006	Proportion of Dwelling Growth
West Grey				
Durham and Neustadt	1,491	1,456	-35	-
Rural Area	3,571	3,809	238	100%
Total Dwellings	5,062	5,265	203	-
Southgate				
Dundalk	748	761	13	10%
Rural Area	1,917	2,040	123	90%
Total Dwellings	2,665	2,801	136	100%
Grey Highlands				
Markdale	649	672	23	8%
Rural Area	4,206	4,470	264	92%
Total Dwellings	4,855	5,142	287	100%
Hanover (urban)	3,005	3,192	187	-
Chatsworth (rural)	2,627	2,742	115	-
The Blue Mountains				
Thornbury/Clarksburg	1,547	1,573	26	11%
Recreational and Rural Areas	3,827	4,046	219	89%
Total Dwellings	5,374	5,619	245	100%
Meaford				
Meaford	2,143	2,247	104	33%
Rural Area	2,734	2,946	212	67%
Total Dwellings	4,877	5,193	316	100%
Georgian Bluffs (rural)	4,399	4,697	298	-
Owen Sound (urban)	9,532	9,736	204	-
County of Grey				
Urban Areas	19,115	19,637	522	26%
Rural Areas	23,281	24,750	1,469	74%
Total Dwellings	42,396	44,387	1,991	100%

Source: Statistics Canada and MGP

Given the abundant supply of rural lots of record and the historic trend for residential growth to locate primarily in rural areas, Settlement growth targets are lower than the aggressive estimates established for the land supply test to account for the realities of non-settlement area growth. *Table 5.3* presents the Settlement residential growth targets established for each area municipality.

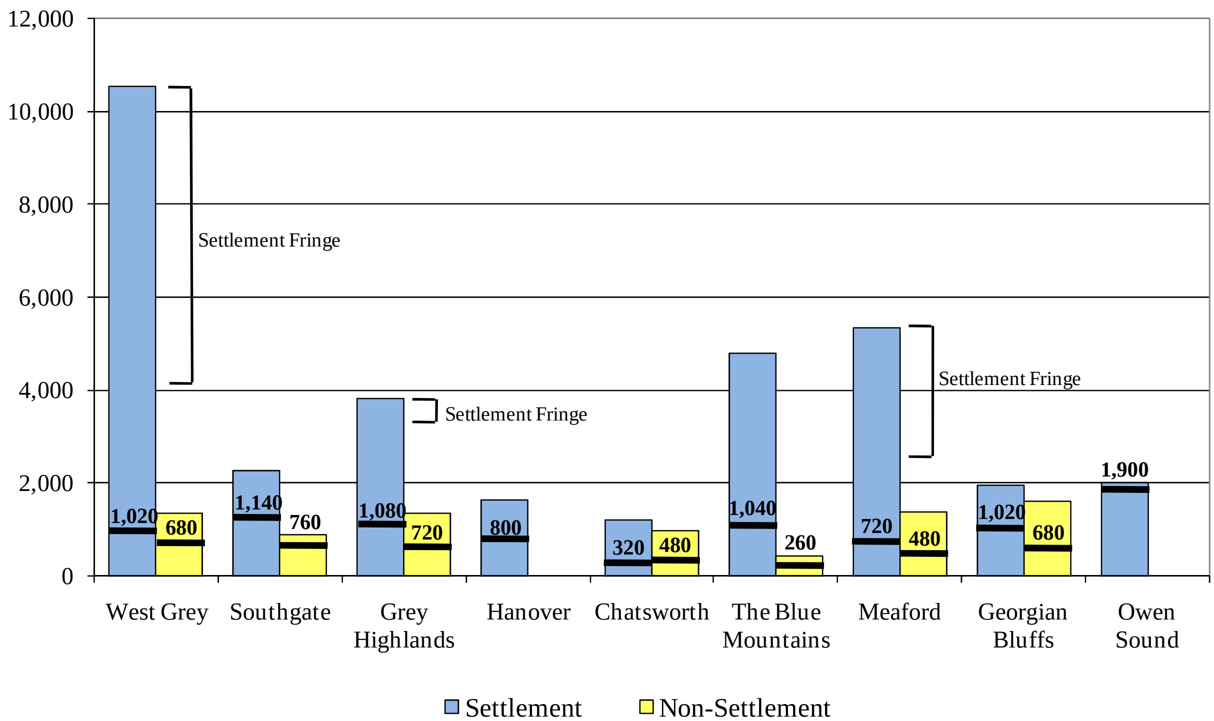
Table 5.3: Settlement Residential Growth Targets

	Total Residential Unit Growth 2006-2031	Settlement Area Target	Number of Settlement Area Units	Number of Non-Settlement Area Units
West Grey	1,700	60%	1,020	680
Southgate	1,900	60%	1,140	760
Grey Highlands	1,800	60%	1,080	720
Hanover	800	100%	800	-
Chatsworth	800	40%	320	480
The Blue Mountains	1,300	80%	1,040	260
Meaford	1,200	60%	720	480
Georgian Bluffs	1,700	60%	1,020	680
Owen Sound	1,900	100%	1,900	-
County of Grey	**13,100**	**69%**	**9,040**	**4,060**

Source: MGP

The sufficiency of the residential land supply in Settlement Areas was tested against demand based on the targets specified in *Table 5.2*. The results of the analysis indicate that there is a sufficient supply of residential units in Settlements for each of the County's area municipalities. As demonstrated in *Figure 5.4*, most municipalities have a significant amount of oversupply. Unit potential with the Settlement Fringe designation is also significant.

Figure 5.4: Settlement and Non-Settlement Residential Unit Supply and Demand Balance



Source: MGP

5.4 Other Urban Land Requirements

In addition to permanent residential units, additional land will be required in urban areas for employment uses and other urban land uses. The following section considers the supply of land for these uses.

5.4.1 Employment Land

There is a sufficient supply of employment land in the County of Grey to accommodate demand.

Employment land demand was quantified by assuming that a certain proportion of future industrial, office, and population serving employment would be located on employment land at both high and low employment densities. More specifically, it was assumed that:

- 100% of employment land employment, 20% of office employment, and 30% of population serving employment would locate on employment land;
- Under the high density scenario, industrial employment would occur at 40 employees per net hectare (epnh), office employment would occur at 90 epnh, and population serving employment would occur at 70 epnh;
- Under the low density scenario, industrial employment would occur at 20 epnh, office employment would occur at 80 epnh, and population serving employment would occur at 50 epnh;
- A 25% vacancy rate was assumed in addition to demand to allow for competition and choice in the land market.

The result, presented in *Table 5.4*, was the finding that a total of between about 65 and 100 net hectares of employment land would be required across the County between 2006 and 2031.

Table 5.4: Employment Land Demand

	Employment Land Demand 2006 to 2031 (net hectares)	
	High Density	**Low Density**
West Grey	10.0	17.1
Southgate	11.5	20.4
Grey Highlands	8.0	12.9
Hanover	4.7	6.7
Chatsworth	4.8	8.3
The Blue Mountains	6.4	10.1
Meaford	4.4	6.5
Georgian Bluffs	6.5	10.7
Owen Sound	8.4	11.6
County of Grey	**64.7**	**104.3**

Source: MGP

To quantify the supply of employment land, the following assumptions were made:

- Gross employment land (excluding Natural and Built Constraints) identified during the vacant property analysis and shown in *Table 5.1* was converted to net hectares using a net to gross ratio of 85%;
- 5% of Hamlet land was assumed to satisfy Employment land requirements; and,
- 15% of Future Development land was assumed to satisfy Employment land requirements.

Under these assumptions, there are approximately 420 net hectares of vacant designated employment land in the County of Grey, sufficient to accommodate the County's employment growth. The results of the analysis are presented in *Table 5.5*.

Table 5.5: Employment Land Demand and Supply Balance

	Supply of Urban Employment Land (gross hectares)	Supply of Urban Employment Land (net hectares)	Supply of Employment Land in Hamlets (net hectares)	Supply of Employment on Future Development Land	Total Supply of Employment Land (net hectares)	Employment Land Supply and Demand Balance 2006 to 2031 (net hectares)	
						High Density	Low Density
West Grey	11.2	9.5	10.0	20.0	39.5	29.5	22.4
Southgate	3.8	3.2	3.0	6.0	12.2	0.7	-8.2
Grey Highlands	43.7	37.1	20.0	-	57.1	49.1	44.2
Hanover	99.0	84.1	-	20.0	104.1	99.5	97.5
Chatsworth	0.0	0.0	10.0	-	10.0	5.2	1.7
The Blue Mountains	28.8	24.5	0.0	5.0	29.5	23.1	19.4
Meaford	20.6	17.5	0.0	-	17.5	13.1	11.0
Georgian Bluffs	10.0	8.5	10.0	-	18.5	12.0	7.8
Owen Sound	166.0	141.1	-	-	141.1	132.7	129.5
County of Grey	**383.0**	**325.6**	**50.0**	**50.0**	**425.6**	**364.9**	**325.3**

Source: MGP

The following points summarize the findings of the employment land analysis:

- West Grey, Grey Highlands, Hanover, The Blue Mountains, Meaford, Georgian Bluffs, and Owen Sound have a sufficient amount of vacant designated employment land to meet the demand generated through both high density and low density demand scenarios.
- Under the assumptions used in this analysis, Southgate does not have a sufficient amount of designated employment land within its Settlement areas to satisfy the demand generated through the low density demand scenario. This demand could be satisfied, however, if a larger proportion of Future Development land was designated for such use, say 30% rather than the 15% assumed in the analysis. Southgate does have a sufficient amount of designated employment land to satisfy the demand generated through the high density demand scenario.
- While Chatsworth does not have an urban area, its employment land demand can be satisfied by the use of Hamlet land.

5.4.2 Other Settlement Land

In addition to residential and employment land needs, there will be a demand over the forecast period for other vacant urban land including land for commercial, institutional, recreational, and infrastructure purposes. While this analysis did not consider land requirements for these uses individually, it is assumed that the supply of other vacant land in the Urban areas and Hamlets are sufficient to satisfy this demand. In addition, our land needs calculations have assumed that

20% of the existing vacant designated residential land supply will be available for supporting uses. As well, we have assumed that only 40% of Future Development and Urban Fringe land would develop for residential uses.

5.5 Conclusions of the Land Supply and Demand Analysis

The following points summarize the conclusions of the land supply and demand analysis:

- There is a sufficient supply of Settlement land in each of the County of Grey's area municipalities to meet Settlement growth targets.
- While there is a sufficient amount of designated Settlement land, some action will have to be taken by a couple of area municipalities to ensure that vacant land is appropriately located within the municipality. More specifically:
  - West Grey has a significant amount of vacant designated Settlement land. Much of it, however, has a Future Development designation and is concentrated in Neustadt, the smaller of the municipality's two urban areas. If Durham is successful in capturing a larger proportion of Settlement growth than Neustadt, then some Urban Fringe land around that Settlement area will have to be considered for a Settlement designation. The number of units created through intensification, in the planning process, or can be located on vacant designated land in Durham totals 560 units, or 33% of projected growth. Our calculations indicate that if 50% of residential unit growth locates in Durham over the forecast period, about 20 gross hectares of Urban Fringe land will have to be designated (this excludes a residential vacancy factor) .
  - Grey Highlands has a significant amount of unit potential in Hamlets, therefore, it has a sufficient amount of Settlement residential land to accommodate the 60% Settlement residential growth target. It should be recognized, however, that residential land supply is limited in Markdale. The number of units created through intensification, in the planning process, or can be located on vacant designated land total 710 units, or 37% of projected growth. Urban Fringe land in Grey Highlands can accommodate an additional 420 units, or an additional 22% of projected growth. Urban Fringe land in this area should be considered for a Settlement designation if the fully-serviced community is to take on a larger proportion of the municipality's growth.

6.0 ISSUES

The following points summarize some of the issues that will influence the amount, rate, and location of future growth in the County of Grey.

Strengthen policies that direct growth to urban areas.

It is important to distinguish between urban and rural areas for the purpose of encouraging compact, contiguous growth that protects environmentally significant or important agricultural areas from development and encourages improved social and economic conditions in an urban area.

The Provincial Policy Statement and the County of Grey Official Plan recognize the social, environmental, and economic benefits of compact urban development. Grey's existing planning policies encourage a compact urban form by directing future growth to Settlement Areas: *Urban* applies to major urban settlements; *Hamlets* applies to rural communities; *Inland Lake and Shoreline* applies to areas of concentrated development around bodies of water; and *Urban Fringe* applies to land adjacent to urban settlements that can best accommodate future urban development.

The following issues should be examined:

- Does the County's hierarchy of urban centres effectively direct the majority of new development to existing urban areas or should policies be strengthened?
- Would it be appropriate to consolidate these designations, potentially eliminating the *Urban Fringe* designation?
- Should County-wide targets defining the proportion of urban vs. rural growth be established?
- Should policies concerning settlement expansion be more restrictive?

Regularly monitor the supply of urban and rural vacant land across the County.

Containment boundaries can cause land price inflation because they can limit or perceive to limit the supply of vacant land. Due to the increased cost of developable land in a constrained market, affordable housing units tend not to be built because projects become economically infeasible. As new higher priced homes are built, the average housing price increases. The problem is exacerbated with a constrained land supply.

The Provincial Policy Statement and the County Official Plan recognize the need for each area municipality to maintain a sufficient supply of vacant land to ensure competition and choice in the market. Only a few of Grey's area municipalities, however, regularly monitor the supply of vacant land. The following issues should be examined:

- Who should be responsible for monitoring the supply of vacant land across the County?
- How often should this exercise take place?
- What land uses should be included in the vacant land inventory?
- How should the supply of vacant lots and total vacant land area be balanced against demand?
- What influence does a constrained land supply have on affordable housing?

Introduce policies that encourage the intensification of the built-up area and higher densities on greenfields.

To be effective, planning strategies that include urban boundaries must permit sufficient opportunities for intensification, as exclusionary zoning only perpetuates low density development and increased housing prices. Intensification refers to conversion, infill, redevelopment, and reuse projects on vacant or underutilized land in existing built-up areas and to higher density development on greenfields. While intensification efforts can apply to all land uses, planning policy is typically concerned with the intensification of residential uses because this land use typically occupies a greater amount of urban land than other uses, housing supply influences the size and composition of a population, and it influences the locational decisions for other land uses.

There are some opportunities for the intensification of Grey's built-up areas, particularly in the County's larger urban centres. The County of Grey Official Plan does not currently include intensification policies, though some area municipalities address the issue in their local Official Plans. Recognizing that land use policies could help enforce municipal objectives for encouraging compact development, thereby aiding in the regulatory process, the following issues should be examined:

- Should the County of Grey Official Plan include residential intensification policies?

- Should area municipalities be responsible for establishing intensification targets in the existing built-up or greenfield areas respectively?
- Should area municipalities be responsible for identifying intensification target areas in the existing built-up area?

Encourage compatible development.

While motherhood principles of compact development are generally accepted by communities, there are significant challenges to implementing intensification projects at the site level, particularly in well-established neighbourhoods. NIMBYist opposition to intensification projects is perhaps the greatest inhibitor and stems primarily from concerns over property values, crowding, and the loss of community values. These constraints can slow or inhibit intensification projects in existing built-up areas, thereby limiting the opportunities to achieve a compact urban form.

Successful intensification projects require community buy-in and a higher quality of urban design to address the legitimate concerns of neighbours. The following issues should be considered:

- How can the general public be involved in a meaningful collaborative planning process that addresses the issue of intensification?
- To what extent should the issue of compatible development be addressed in County-wide policies?
- How can the requirement for higher quality design for intensification units be integrated into Official Plan policies and the approval process?

Consider the implementation of financial incentive and disincentive programs to achieve land use objectives.

Financial techniques can be used by municipalities as an area specific control over development in an effort to achieve land use objectives. Financial incentives can be used to encourage development in targeted areas and charges can be imposed to discourage growth in others. The land market is the most important factor in spatial development patterns, as it influences the locational decisions of households and developers and controls the density of development. Property taxes, development charges, building permits, and parking fees influence citizens' and developers' choices about where to locate and, for that reason, can be brought in line with planning objectives. Types of programs available include the creation of development charge sub-areas, a brownfields strategy, density bonusing, and protection programs. The following issues should be considered:

- To what extent should the County encourage the use of financial incentives and disincentives to encourage infill and redevelopment of vacant or underutilized urban land?
- What would be the most appropriate financial incentive and disincentive programs for area municipalities?
- How can the County and area municipalities work with the Province to establish appropriate programs?

Take a regional approach to growth management.

Responses to growth management techniques are typically observed at a regional level, therefore, it is important for the County of Grey to take into consideration growth trends and policies in neighbouring municipalities. Political fragmentation can undermine large land use planning efforts as individual Counties adopt their own land use regulations and growth targets.

In the absence of a large, regional approach to planning, neighbouring municipalities can implement growth management measures without considering the impact of such measurers on adjacent municipalities. "Spillover" can occur between municipalities who have adopted controls to those who have not. As an example, some of Grey's area municipalities have expressed concern about the competitive effects of adopting development charges when adjacent municipalities have not. Similarly, the lack of large tracts of vacant land parcels in some municipalities has caused potential developers to look to adjacent municipalities. The following issues should be considered:

- To what degree should the existing competitive environment be reflected in new growth management policies and programs?
- To what extent should the County consult with neighbouring municipalities about new growth management policies and programs?

Protection of prime agricultural areas and environmentally significant features.

The County of Grey's economy is dominated by primary industries and the current Official Plan recognizes the social and economic importance of protecting designated agricultural land. Existing farming operations include a mixture of cash crops and livestock farms which contribute to economic activity for related businesses such as agricultural supplies, equipment stores, and processing plants. While employment in the agriculture industry is expected to decline over the forecast period, the need to preserve land with soils best suited for agricultural operations is a necessity.

APPENDIX A

Population in Census Years

APPENDIX A Population in Census Years

The following tables provide details on population change in the County of Grey and area municipalities.

Table A.1: Population in Census Years

	1976	1981	1986	1991	1996	2001	2006
Ontario (000s)	8,114	8,497	9,102	10,085	10,754	11,410	12,160
Grey County	72,161	73,760	74,759	84,071	87,621	89,073	92,411
West Grey	---	---	10,216	11,240	11,499	11,741	12,193
Southgate	---	---	4,855	6,012	6,449	6,907	7,167
Grey Highlands	---	---	6,929	7,828	8,620	9,196	9,480
Hanover	---	---	6,414	6,711	6,965	6,869	7,147
Chatsworth	---	---	5,111	5,981	6,278	6,280	6,392
The Blue Mountains	---	---	4,299	5,036	5,667	6,116	6,825
Meaford	---	---	8,897	9,851	10,497	10,381	10,948
Georgian Bluffs	---	---	8,167	9,738	10,256	10,127	10,506
Owen Sound	---	---	19,871	21,674	21,390	21,456	21,753

Source: Statistics Canada
Notes: Unadjusted for undercount. Adjusted for 1996 amalgamation.

Table A.2: Change in Population, Absolute

	---	1976 - 1981	1981 - 1986	1986 - 1991	1991 - 1996	1996 - 2001	2001 - 2006
Ontario (000s)	---	383	604	983	669	656	750
Grey County	---	1,599	999	9,312	3,550	1,452	3,338
West Grey	---	---	---	1,024	259	242	452
Southgate	---	---	---	1,157	437	458	260
Grey Highlands	---	---	---	899	792	576	284
Hanover	---	---	---	297	254	-96	278
Chatsworth	---	---	---	870	297	2	112
The Blue Mountains	---	---	---	737	631	449	709
Meaford	---	---	---	954	646	-116	567
Georgian Bluffs	---	---	---	1,571	518	-129	379
Owen Sound	---	---	---	1,803	-284	66	297

Table A.3: Change in Population, Percent

	---	1976 - 1981	1981 - 1986	1986 - 1991	1991 - 1996	1996 - 2001	2001 - 2006
Ontario	---	4.7	7.1	10.8	6.6	6.1	6.6
Grey County	---	2.2	1.4	12.5	4.2	1.7	3.7
West Grey	---	---	---	10.0	2.3	2.1	3.8
Southgate	---	---	---	23.8	7.3	7.1	3.8
Grey Highlands	---	---	---	13.0	10.1	6.7	3.1
Hanover	---	---	---	4.6	3.8	-1.4	4.0
Chatsworth	---	---	---	17.0	5.0	0.0	1.8
The Blue Mountains	---	---	---	17.1	12.5	7.9	11.6
Meaford	---	---	---	10.7	6.6	-1.1	5.5
Georgian Bluffs	---	---	---	19.2	5.3	-1.3	3.7
Owen Sound	---	---	---	9.1	-1.3	0.3	1.4

APPENDIX B

Residential Building Permits

APPENDIX B Residential Building Permits

The following tables provide details on the number of building permits issued for residential units in County of Grey's area municipalities.

Figure B.1: Residential Building Permits

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
West Grey	-	-	-	-	-	-	-	-	-	-	37	65	60	48	74	61
Southgate	-	-	-	27	27	31	38	29	33	28	23	30	33	29	29	30
Grey Highlands	-	56	51	42	50	33	50	38	55	58	56	70	85	82	75	58
Hanover	94	30	11	16	4	2	2	5	8	26	9	22	41	48	59	87
Chatsworth	-	-	-	-	-	-	-	-	-	-	22	45	41	39	48	51
The Blue Mountains	-	-	-	-	-	-	-	-	-	125	150	22	213	146	151	294
Meaford	-	-	-	-	-	-	-	-	-	-	45	56	55	76	109	56
Georgian Bluffs	-	-	-	-	-	-	-	-	-	-	-	-	57	73	49	68
Owen Sound	73	72	26	28	16	14	17	23	33	90	17	50	47	24	72	26
Municipality of West Grey																
Detached											37	65	60	38	55	49
Townhomes											0	0	0	10	18	0
Condominiums											0	0	0	0	0	12
Other											0	0	0	0	1	0
Total											**37**	**65**	**60**	**48**	**73**	**61**
Precent Multiple Residential											0.0%	0.0%	0.0%	20.8%	24.7%	19.7%
Municipality of Grey Highlands																
Singles/Semis		56	46	42	50	27	40	38	50	58	56					
Townhouses		0	5	0	0	6	10	0	5	0	0					
Apartments		0	0	0	0	0	0	0	0	0	0					
Total		**56**	**51**	**42**	**50**	**33**	**50**	**38**	**55**	**58**	**56**					
Precent Multiple Residential		0.0%	9.8%	0.0%	0.0%	18.2%	20.0%	0.0%	9.1%	0.0%	0.0%					
Cottages		0	2	2	0	0	1	0	0	0	0					
Town of Hanover																
Residential	17	24	11	16	4	2	2	5	8	15	9	18	27	31	33	17
Multi Residential	77	6	0	0	0	0	0	0	0	11	0	4	14	17	26	70
Total	**94**	**30**	**11**	**16**	**4**	**2**	**2**	**5**	**8**	**26**	**9**	**22**	**41**	**48**	**59**	**87**
Precent Multiple Residential	81.9%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	42.3%	0.0%	18.2%	34.1%	35.4%	44.1%	80.5%
Municipality of Meaford																
New Homes											45	56	55	61	93	53
Multi Residential											0	0	0	15	16	3
Total											**45**	**56**	**55**	**76**	**109**	**56**
Precent Multiple Residential											0.0%	0.0%	0.0%	19.7%	14.7%	5.4%
City of Owen Sound																
Singles	35	22	26	20	16	14	17	15	20	22	9	29	32	24	37	23
Row/Semi-Detached	34	50	0	8	0	0	0	6	11	12	7	3	15	0	35	1
Apartments/Condominiums	4	0	0	0	0	0	0	2	2	56	1	18	0	0	0	2
Total	**73**	**72**	**26**	**28**	**16**	**14**	**17**	**23**	**33**	**90**	**17**	**50**	**47**	**24**	**72**	**26**
Precent Multiple Residential	52.1%	69.4%	0.0%	28.6%	0.0%	0.0%	0.0%	34.8%	39.4%	75.6%	47.1%	42.0%	31.9%	0.0%	48.6%	11.5%
Town of the Blue Mountains																
Permanent/Seasonal Dwelling Units										125	150	22	213	146	151	294
CRUs										187	91	191	0	222	166	0
Total										**312**	**241**	**213**	**213**	**368**	**317**	**294**

APPENDIX C

Location Quotients by Area Municipality

APPENDIX C Location Quotients by Area Municipality

The following table provides details on the number of jobs in the County of Grey and its area municipalities and the location quotient for each.

Table C.1: Location Quotients by Industry for County of Grey Relative to Ontario, 2001

	Jobs in the County of	Percent Share	Jobs in Ontario	Percent Share	Location Quotient
All industries	**35,205**	**100%**	**5,252,745**	**100%**	**100**
Primary	**3,245**	**9%**	**128,110**	**2%**	**378**
Agriculture, forestry, fishing, hunting	3,195	9%	109,910	2%	434
Mining, oil, gas extraction	50	0%	18,200	0%	41
Industrial Activities	**8,550**	**24%**	**1,373,540**	**26%**	**93**
Manufacturing	6,525	19%	909,710	17%	107
Transportation, warehousing	900	3%	212,825	4%	63
Wholesale trade	1,125	3%	251,005	5%	67
Business Services	**2,225**	**6%**	**573,965**	**11%**	**58**
Professional, scientific, technical services	1,310	4%	382,120	7%	51
Administrative support, management	915	3%	191,845	4%	71
Tourism	**8,805**	**25%**	**1,222,615**	**23%**	**107**
Retail trade	4,945	14%	621,625	12%	119
Information, cultural industries	580	2%	152,880	3%	57
Arts, entertainment, recreation	750	2%	103,055	2%	109
Accommodation, food services	2,530	7%	345,055	7%	109
Other Tradable Services	**12,380**	**35%**	**1,954,515**	**37%**	**95**
Utilities	115	0%	41,970	1%	41
Construction	1,405	4%	162,850	3%	129
Finance, insurance	850	2%	279,600	5%	45
Real estate, rental, leasing	555	2%	99,950	2%	83
Educational services	1,925	5%	340,835	6%	84
Health care, social assistance	4,360	12%	491,655	9%	132
Other services (except public administration)	1,905	5%	243,390	5%	117
Public administration	1,265	4%	294,265	6%	64

Source: Statistics Canada, Employment by Place of Work, 2001

Table C.2: Number of Jobs by Industry in the County of Grey's Area Municipalities, 2001

	West Grey	Southgate	Grey Highlands	Hanover	Chatsworth	The Blue Mountains	Meaford	Georgian Bluffs	Owen Sound
All industries	**3,455**	**1,570**	**3,475**	**4,715**	**1,250**	**2,690**	**2,770**	**2,345**	**12,965**
Primary	**710**	**520**	**415**	**225**	**420**	**230**	**320**	**330**	**65**
Agriculture, forestry, fishing, hunting	710	520	395	225	420	230	310	330	45
Mining, oil, gas extraction	0	0	20	0	0	0	10	0	20
Industrial Activities	**1,310**	**405**	**1,105**	**1,280**	**245**	**425**	**350**	**485**	**2,955**
Manufacturing	1,195	255	790	1,010	150	260	220	385	2,255
Transportation, warehousing	75	85	35	165	35	75	100	30	300
Wholesale trade	40	65	280	105	60	90	30	70	400
Business Services	**165**	**75**	**170**	**195**	**100**	**335**	**195**	**190**	**800**
Professional, scientific, technical services	115	40	140	115	60	155	100	130	460
Administrative support, management	50	35	30	80	40	180	95	60	340
Tourism	**550**	**195**	**740**	**1,475**	**130**	**1,055**	**690**	**650**	**3,330**
Retail trade	295	110	405	800	80	350	355	415	2,135
Information, cultural industries	60	15	30	145	0	10	25	35	270
Arts, entertainment, recreation	20	20	100	135	10	180	70	80	140
Accommodation, food services	175	50	205	395	40	515	240	120	785
Other Tradable Services	**720**	**375**	**1,045**	**1,540**	**355**	**645**	**1,215**	**690**	**5,815**
Utilities	10	10	0	0	0	15	20	10	50
Construction	110	85	165	180	45	235	125	210	260
Finance, insurance	45	25	40	190	0	30	60	20	430
Real estate, rental, leasing	10	35	55	35	0	40	80	100	210
Educational services	95	70	265	255	45	55	195	75	870
Health care, social assistance	260	50	265	535	115	135	355	85	2,570
Other services (except public administration)	160	55	185	250	135	100	170	150	700
Public administration	30	45	70	95	15	35	210	40	725

Source: Statistics Canada, Employment by Place of Work, 2001

Note: Jobs by Industry may not total the County of Grey's Jobs by Industry due to rounding.

Table C.3: Location Quotients by Industry for County of Grey's Area Municipalities Relative to Ontario, 2001

	West Grey	Southgate	Grey Highlands	Hanover	Chatsworth	The Blue Mountains	Meaford	Georgian Bluffs	Owen Sound
All industries	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Primary	**223**	**359**	**130**	**52**	**365**	**93**	**125**	**153**	**5**
Agriculture, forestry, fishing, hunting	226	365	125	53	370	94	123	155	4
Mining, oil, gas extraction	0	0	405	0	0	0	254	0	109
Industrial Activities	**156**	**106**	**131**	**112**	**81**	**65**	**52**	**85**	**94**
Manufacturing	187	88	123	116	65	52	43	89	94
Transportation, warehousing	85	212	39	137	110	109	141	50	91
Wholesale trade	36	130	252	70	150	105	34	93	97
Business Services	**76**	**76**	**77**	**65**	**127**	**197**	**111**	**128**	**98**
Professional, scientific, technical services	89	68	108	66	129	155	97	149	95
Administrative support, management	56	86	33	65	123	257	132	98	101
Tourism	**64**	**50**	**85**	**125**	**42**	**157**	**100**	**111**	**103**
Retail trade	61	50	83	121	46	93	91	126	117
Information, cultural industries	105	58	52	187	0	23	55	91	126
Arts, entertainment, recreation	27	60	135	134	38	314	119	160	51
Accommodation, food services	70	44	82	117	45	266	121	71	84
Other Tradable Services	**59**	**68**	**86**	**93**	**81**	**68**	**125**	**84**	**128**
Utilities	89	195	0	0	0	171	221	131	118
Construction	80	136	119	96	90	219	113	224	50
Finance, insurance	54	66	48	167	0	46	90	35	137
Real estate, rental, leasing	18	141	100	47	0	94	183	271	103
Educational services	50	82	139	99	66	37	129	58	123
Health care, social assistance	61	26	62	92	74	41	103	29	160
Other services (except public administration)	86	65	98	98	200	69	113	118	100
Public administration	24	80	56	56	33	36	211	47	156

APPENDIX D

Employment by Place of Residence

APPENDIX D Employment by Place of Residence

The following tables provide 2001 employment by place of residence details by area municipality.

Figure D.1: Place of Work By Area Municipality, 2001

	County of Grey	West Grey	Southgate	Grey Highlands	Hanover
West Grey	2,060	1,420	150	0	355
Southgate	680	65	405	185	0
Grey Highlands	2,520	420	115	1,360	15
Hanover	3,190	1,115	45	15	1,900
Chatsworth	475	20	0	15	0
The Blue Mountains	1,425	0	0	100	10
Meaford	1,900	20	0	105	0
Georgian Bluffs	1,315	0	0	20	10
Owen Sound	11,065	105	20	120	55
County of Grey	**24,630**	**3,165**	**735**	**1,920**	**2,345**
At Home	6,065	1,110	740	780	210
Total Residents Working in Grey	**30,695**	**4,275**	**1,475**	**2,700**	**2,555**
Bruce County	2,070	320	30	40	375
Huron County	85				
Wellington County	1,235	475	510	60	80
Dufferin County	610	60	340	190	10
Simcoe County	1,890	55	140	470	25
Total Residents Working in Surrounding Municipalities	**5,890**	**910**	**1,020**	**760**	**490**
Other Workplace	2,275	425	470	380	145
No Fixed Workplace	4,300	640	430	590	170
Total Residents Employed	**43,160**	**6,250**	**3,395**	**4,430**	**3,360**

Source: Statistics Canada, Employment by Place of Residence, 2001

Figure D.1: Place of Work By Area Municipality, 2001 (con't)

	Chatsworth	The Blue Mountains	Meaford	Georgian Bluffs	Owen Sound
West Grey	55	0	0	10	70
Southgate	10	0	0	0	15
Grey Highlands	325	35	85	60	105
Hanover	65	0	0	25	25
Chatsworth	330	0	10	55	45
The Blue Mountains	20	905	325	40	25
Meaford	45	75	1,370	50	235
Georgian Bluffs	85	0	145	545	510
Owen Sound	770	40	1,160	2,435	6,360
County of Grey	**1,705**	**1,055**	**3,095**	**3,220**	**7,390**
At Home	710	500	745	830	440
Total Residents Working in Grey	**2,415**	**1,555**	**3,840**	**4,050**	**7,830**
Bruce County	195	0	60	685	365
Huron County					
Wellington County	60	10	0	10	30
Dufferin County	0	10	0	0	0
Simcoe County	20	680	400	25	75
Total Residents Working in Surrounding Municipalities	**275**	**700**	**460**	**720**	**470**
Other Workplace	140	190	190	160	260
No Fixed Workplace	290	435	630	435	680
Total Residents Employed	**3,120**	**2,880**	**5,120**	**5,365**	**9,240**

Source: Statistics Canada, Employment by Place of Residence, 2001

APPENDIX E

Projection Details

APPENDIX E Projection Details

The following tables provide greater details on the County of Grey's population, employment, and household projections.

Figure E.1: Base Case Projection Details

	2001	2006	2011	2016	2021	2026	2031	Change 01-31
Population								
Total	92,400	95,900	102,200	107,700	113,800	116,900	119,500	27,100
Persons Aged 00-14	16,790	15,090	14,900	15,420	16,590	16,860	16,460	-330
Persons Aged 15-19	6,740	6,930	6,630	6,250	6,130	6,180	6,630	-110
Persons Aged 20-24	5,050	6,320	6,820	6,290	5,910	5,700	5,760	710
Persons Aged 25-34	9,360	9,040	10,800	12,520	12,260	10,700	10,150	790
Persons Aged 35-44	13,940	13,070	12,740	12,860	14,570	15,860	15,130	1,190
Persons Aged 45-54	13,820	14,580	15,100	14,510	14,210	14,130	15,450	1,630
Persons Aged 55-64	10,550	13,250	15,310	16,250	16,730	16,320	15,840	5,290
Persons Aged 65-74	8,960	9,520	11,260	14,330	16,630	17,960	18,770	9,810
Persons Aged 75+	7,190	8,100	8,640	9,270	10,770	13,190	15,310	8,120
Five year population change	-----	3,470	6,250	5,390	6,060	3,360	2,550	27,080
Births	-----	3,750	4,200	4,700	4,900	4,550	4,200	26,300
Deaths	-----	4,850	5,450	6,000	6,700	7,500	8,450	38,950
Net natural	-----	-1,100	-1,250	-1,300	-1,800	-2,950	-4,250	-12,650
Net migration	-----	4,600	7,550	6,800	7,900	6,050	6,850	39,750
Households								
Total	35,300	37,100	40,400	43,500	46,600	48,500	50,200	14,900
Maintainers Aged <25	990	1,050	1,070	1,030	1,000	990	1,010	20
Maintainers Aged 25-34	3,830	3,680	4,250	4,820	4,740	4,230	4,060	230
Maintainers Aged 35-44	7,050	6,610	6,520	6,590	7,290	7,770	7,490	440
Maintainers Aged 45-54	7,420	7,670	7,930	7,680	7,580	7,510	8,110	690
Maintainers Aged 55-64	5,880	7,210	8,330	8,840	9,120	8,880	8,630	2,750
Maintainers Aged 65-74	5,520	5,780	6,840	8,680	10,070	10,830	11,320	5,800
Maintainers Aged 75+	4,610	5,100	5,460	5,860	6,800	8,290	9,580	4,970
Persons per household	2.62	2.58	2.53	2.48	2.44	2.41	2.38	-0.24
The labour market								
Population 15+	75,610	80,810	87,300	92,280	97,210	100,040	103,040	27,430
Source population	71,300	76,160	82,230	86,840	91,450	94,330	97,090	25,790
Participation rate (%)	64.0	64.8	64.1	62.9	61.3	59.8	58.0	-6.0
Labour force	45,610	49,330	52,700	54,580	56,090	56,370	56,300	10,690
Employment	43,160	46,690	49,980	51,870	53,440	53,860	53,930	10,770
Unemployment	2,450	2,640	2,720	2,710	2,650	2,510	2,370	-80
Unemployment rate (%)	5.4	5.4	5.2	5.0	4.7	4.5	4.2	-1.2
Population 20-64	52,720	56,260	60,770	62,430	63,680	62,710	62,330	9,610
Employment	43,160	46,690	49,980	51,870	53,440	53,860	53,930	10,770
% Share	81.9	83.0	82.2	83.1	83.9	85.9	86.5	-----
Employed by place of work	35,400	38,100	40,800	42,400	43,600	43,900	44,000	8,600
Activity rate (%)	38	40	40	39	38	38	37	-1
Commuters	7,960	9,250	9,830	10,230	10,590	10,830	10,910	2,950
Export based employment	12,480	13,170	13,240	13,080	12,860	12,520	12,150	-330
Primary	3,250	3,550	3,170	2,820	2,520	2,220	1,940	-1,310
Manufacturing	6,530	6,410	6,450	6,300	6,050	5,730	5,380	-1,150
Tourism-Seasonal-Retirement Rela	2,710	3,210	3,620	3,960	4,290	4,570	4,830	2,120
Community based employment	22,920	24,920	27,570	29,280	30,750	31,420	31,830	8,910

Source: C4SE

APPENDIX F

Land Supply and Demand Analysis

APPENDIX F LAND SUPPLY AND DEMAND ANALYSIS

A comprehensive review of vacant land in the County of Grey was carried out as part of the County of Grey's Growth Management Strategy. GIS and vacant land inventories were used to quantify the amount of vacant land in the County. This Appendix provides details on the supply analysis and balances the results against demand by area municipality.

F.1 Identification of Vacant Land

Vacant properties in the County of Grey were identified using GIS and MPAC property codes, area municipality vacant land inventories, and through the manual selection of properties with an urban designation that had development potential. The following points summarize the approach used to identify and quantify the supply of vacant land in the municipality.

- With the exception of Owen Sound and portions of The Blue Mountains and Georgian Bluffs, vacant properties throughout the County were identified using GIS and a property shapefile provided by the County that included MPAC property code information. This information was provided to the County by Teranet and was dated March 20, 2007.
- *Table F.1* provides details on the MPAC property codes that were selected as being representative of vacant land. Any property with one of these codes was assumed as being vacant and having development potential.

Table F.1: MPAC Property Codes Identifying Vacant Land

Property Code	Description
100	Vacant residential land not on water
101	Second tier vacant lot
105	Vacant commercial land
106	Vacant industrial land
110	Vacant residential/recreational land on water
200	Farm property without any buildings/structures
210	Farm without residence – with secondary structures; with farm outbuildings
220	Farm without residence – with commercial/industrial operation
230	Intensive farm operation – without residence
240	Managed forest property, vacant land not on water
241	Managed forest property, vacant land on water
260	Vacant residential/commercial/industrial land owned by a non-farmer with a portion being farmed
261	Land owned by a non-farmer improved with a non-farm residence with a portion being farmed

- In the case of Owen Sound, the following approach was used to identify vacant land:
    - Owen Sound maintains data on the supply of vacant land by Official Plan designation. The municipality provided an inventory of vacant land by Official Plan designation on a Schedule entitled *City of Owen Sound Subdivision Location & Vacant Land* dated February 2007. This information was digitized and properties were added to the GIS project.
- In the case of The Blue Mountains, two approaches were taken to identify vacant land:
    - For Thornbury/Clarksburg, MPAC property code information was used to identify vacant properties.
    - For Craigleith, Camperdown, Castle Glen, Swiss Meadows, Grandview, Lora Bay, and Osler, vacant land and unit yield was determined by using the Town's Official Plan *Schedule "B" – Unit Yields* which identifies the maximum number of units which may be developed for specific properties based on servicing. Assumptions made about permanent and seasonal supply are presented in Section F.5 of this Appendix.
- After the initial automated selection of parcels, additional properties with either an Urban or Urban Fringe designation in the County of Grey Official Plan were added manually to the vacant land supply. This step was carried out for the purpose of identifying large properties (over 3 hectares) that could accommodate urban development but were excluded from the automated process because there was some existing development on the property (as reflected in the MPAC property code). It was expected that these properties would develop for Urban use over the forecast period should there be sufficient demand.
- A *Vacant Properties* shapefile was created of the selected parcels.

Removal of Properties with Units in the Planning Process

- The County of Grey maintains a database of units in Plans of Subdivision/Condominium for each area municipality for which it has approval authority. This data as well as that provided by Owen Sound was used to prepare a *Plans of Subdivision and Condominium* shapefile which identified the properties that had units in the planning process. Any vacant property that was identified in the previous step that was also identified as being in the planning process was removed from the vacant land supply. Unit supply on these properties was accounted for separately, as detailed in Appendix G.

Removal of Land with Natural or Built Features

- Recognizing that land supply can be limited by the presence of natural and existing built features, land with these characteristics were identified, assembled into either a *Natural Constraints* shapefile or *Built Constraints* shapefile, and removed from the vacant land supply. More specifically, the following features were identified as Natural Constraints:
  - Areas of Natural and Scientific Interest (with buffer)
  - Water Courses (with buffer)
  - Significant Wetlands (with buffer)
  - Waterbodies (with buffer)
  - Wetlands (with buffer)
  - Hazard lands
  - Inland Lakes and Waterways
  - Mineral Resource Extraction Areas (with buffer)
  - Open Space/Parks in Urban areas as indicated in local Official Plans
- The following features were identified as Built Constraints:
  - Roads (with buffer dependent on hierarchy)
  - Highways (with buffer)
  - Hydro corridors (with buffer)
  - Railway lines (with buffer)
  - Landfill sites (with buffer)

Urban, Hamlet and Rural Supply

- The vacant land supply analysis was not only concerned with the total supply of vacant land, but also its designation with the County of Grey Official Plan. Vacant properties were classified as being either *Urban* (Urban and Urban Fringe designation in the County Official Plan), *Hamlet* (Hamlet designation), or *Rural* (all other designations). Shapefiles containing vacant properties were prepared for each of these classifications.

Application of a General Land Use Designation in Urban Areas

- This analysis was concerned with the supply of Urban land by local Official Plan land use designation. GIS shapefiles of local Official Plans were provided by area municipalities or digitized by the County. From this data, an *Urban General Land Use* shapefile was prepared. Local Official Plan designations were classified as:
  1. Residential
  2. Employment
  3. Mixed Use (includes Downtown and Mixed Use designations)
  4. Future Development
  5. Other Urban (includes Commercial and Institutional designations)
  6. Urban Fringe

- Vacant properties identified in the County's Urban areas were classified as one of these six general land use classifications.

Vacant Land Supply Results

- The results of the vacant land supply analysis that pertain to future land potential to support residential and employment development are presented in *Table F.2.*

Table F.2: Supply of Vacant Land in the County of Grey

	Urban Residential (gross hectares)	**Urban Employment** (gross hectares)	**Future Development** (gross hectares)	**Urban Fringe** (gross hectares)	**Hamlet** (gross hectares)	**Rural** (Total Parcels)
West Grey	27.9	11.2	146.2	804.6	261.1	1,300
Durham	*23.0*	*1.7*	*0.0*	*350.8*	*0.0*	*0*
Neustadt	*4.9*	*9.5*	*146.2*	*0.0*	*0.0*	*0*
Other West Grey	*0.0*	*0.0*	*0.0*	*453.8*	*261.1*	*1,300*
Southgate	66.1	3.8	41.8	0.0	53.9	837
Grey Highlands	24.2	43.7	0.0	51.9	327.2	1,353
Hanover	41.2	99.0	102.8	0.0	0.0	0
Chatsworth	0.0	0.0	0.0	0.0	139.6	973
The Blue Mountains	524.3	28.8	31.7	0.0	20.9	410
Thornbury/Clarksburg	*37.1*	*28.8*	*31.7*	*0.0*	-	-
Other The Blue Mountains	*487.2*	-	-	-	*20.9*	*410*
Meaford	98.5	20.6	0.0	379.0	55.1	1,265
Georgian Bluffs	0.0	10.0	0.0	0.0	125.8	1,590
Owen Sound	67.5	166.0	0.0	0.0	0.0	0
Total	**849.7**	**383.0**	**322.5**	**1,235.5**	**983.4**	**7,728**

Note: The supply of Urban Residential land in Other The Blue Mountains (Craigleith, Camperdown, Castle Glen, Swiss Meadows, Grandview, Lora Bay, and Osler) was calculated using summary tables presented in Official Plan Schedule B – Unit Yields minus properties in the planning process. This entry does not exclude Built and Natural Constraints areas.

F.2 Urban Residential Land Supply and Demand Test

The intent of the Urban residential land supply and demand analysis was to test whether there was a sufficient amount of vacant land within each area municipalities' urban area(s) to accommodate a proportion of future permanent residential unit growth. The following tables present a series of calculations that first define the total amount of growth given to each area municipality then sequentially subtract supply to end with a final supply and demand balance. This analysis deals with permanent units and excludes those units that are considered to be seasonal. The analysis is based on growth allocated to each of the area municipalities between 2006 and 2031, as detailed in Section 4 of this report.

Growth Share Tests

The proportion of growth directed to urban areas during this test represents the upper limit of growth that could be expected to locate in Urban areas between 2006 and 2031. The following proportions were tested:

- Chatsworth does not have a designated Urban area, therefore, 0% of future unit demand would be directed to urban areas.
- Hanover and Owen Sound are predominantly Urban, therefore, supply was assessed assuming 100% of future unit demand would be directed to urban areas.
- For the remaining area municipalities, supply was assessed assuming 85% of future unit demand would be directed to Urban areas.

Table F.3: Permanent Units Required in the Urban Area

	Total Residential Unit Demand 2006 to 2031	Proportion Directed to Urban Area	Units Required in Urban Area 2006 to 2031
West Grey	1,700	85%	1,450
Southgate	1,900	85%	1,620
Grey Highlands	1,800	85%	1,530
Hanover	800	100%	800
Chatsworth	800	0%	0
The Blue Mountains	1,300	85%	1,110
Meaford	1,200	85%	1,020
Georgian Bluffs	1,700	85%	1,450
Owen Sound	1,900	100%	1,900
Total	**13,100**	**-**	**10,880**

Intensification and Conversion

Recognizing the importance and potential for the intensification of the built-up area, it was assumed that a proportion of the units directed to Urban areas could be accommodated through intensification and conversions. The following intensification proportions and, in the case of The Blue Mountains conversions, were tested:

- Chatsworth does not have an urban area and Georgian Bluffs urban area is presently undeveloped. No Urban area intensification potential was identified for these area municipalities.
- Owen Sound has greater opportunities for intensification than other Urban areas. It was assumed that 15% of future unit demand could be satisfied through intensification.
- For the remaining area municipalities, 10% of future unit demand was assumed to be satisfied through intensification.
- As discussed in Section 2.3 of this report, the proportion of Private Dwellings Occupied by Usual Residents in The Blue Mountains increased by 4.2% between 2001 and 2006, an indication that seasonal dwellings are being converted to permanent dwellings at just less than 1% a year. To account for the influence of conversions, it was assumed that 1% of The Blue Mountains permanent housing would convert from seasonal to permanent use annually. This amounts to a total of about 780 conversions over the forecast period.

Table F.4: Units Created Through Intensification and Conversion of Seasonal Units

	Units Required in Urban Area 2006 to 2031	Urban Area Intensification Potential	Units Created Through Intensification	Units Created Through Conversions	Units Required in Urban Area After Considering Intensification
West Grey	1,450	10%	150	-	1,300
Southgate	1,620	10%	160	-	1,460
Grey Highlands	1,530	10%	150	-	1,380
Hanover	800	10%	80	-	720
Chatsworth	0	-	-	-	-
The Blue Mountains	1,110	10%	110	800	200
Meaford	1,020	10%	100	-	920
Georgian Bluffs	1,450	-	-	-	1,450
Owen Sound	1,900	15%	290	-	1,610
Total	**10,880**	**-**	**1,040**	**800**	**9,040**

Units in the Planning Process

There are an estimated 3,910 permanent residential units in the planning process in the County of Grey's Urban areas. These units will help to satisfy some of the unit demand projected to 2031. Details on the number of permanent units in the planning process are presented in Appendix G.

Table F.5: Units in the Planning Process

	Units Required in Urban Area After Considering Intensification	Units In Planning Process	Units Required in Urban Area After Considering Units In Plans
West Grey	1,300	210	1,090
Durham	-	*100*	-
Neustadt	-	*110*	-
Southgate	1,460	260	1,200
Grey Highlands	1,380	170	1,210
Hanover	720	70	650
Chatsworth	-	-	-
The Blue Mountains	200	1,830	-1,630
Thornbury/Clarksburg	-	*230*	-
Other The Blue Mountains	-	*1,590*	-
Meaford	920	190	730
Georgian Bluffs	1,450	800	650
Owen Sound	1,610	380	1,230
Total	**9,040**	**3,910**	**5,130**

Units on Vacant Designated Residential Land

A large proportion of residential unit growth in urban areas to 2031 will be satisfied through the absorption of vacant designated residential land. The following approach was used to quantify the supply of vacant designated residential land in the County of Grey by area municipality:

- The column entitled *Gross Vacant Designated Residential Land Excluding Constraints (gross hectares)* in *Table F.6* is based on the findings of the vacant land analysis presented in *Table F.2.* It should be noted that the vacant land identified in Other The Blue

Mountains does not exclude Natural and Built Constraints and it is not possible to estimate how much of the land could be netted out for other urban land uses. The approach used to calculate permanent unit supply on these vacant lands is detailed in Section F.5 of this Appendix.

- Of the *Gross Vacant Designated Residential Land Excluding Constraints (gross hectares)*, 20% was assumed to represent the requirement for supporting uses such as local roads, parks, stormwater management facilities, etc. Applying this factor gives *Vacant Designated Residential Land (net hectares).*
- Development density assumptions were applied to the vacant designated residential land:
  - The development density for Owen Sound was assumed to be 25 units per net hectare.
  - For all other municipalities, residential units were assumed to develop at 20 units per net hectare.
- The result was an estimate of *Units on Vacant Designated Residential Land.* Unit potential in The Blue Mountains outside of Thornbury/Clarksburg was included in this total.

Table F.6: Units on Vacant Designated Residential Land

	Units Required in Urban Area After Considering Units In Plans	Gross Vacant Designated Residential Land Excluding Constraints (gross hectares)	Assumed Proportion Used for Non-residential Uses (local, roads, parks, schools)	Vacant Designated Residential Land (net hectares)	Assumed Development Density (units per hectare)	Units On Vacant Designated Residential Land	Units Required in Urban Area After Considering Units on Vacant Urban Land
West Grey	1,090	27.9	20%	22.3	20	450	640
Durham	-	*23.0*	*20%*	*18.4*	*20*	*370*	-
Neustadt	-	*4.9*	*20%*	*3.9*	*20*	*80*	-
Southgate	1,200	66.1	20%	52.9	20	1,060	140
Grey Highlands	1,210	24.2	20%	19.4	20	390	820
Hanover	650	41.2	20%	33.0	20	660	-10
Chatsworth	-	0.0	-	-	-	-	-
The Blue Mountains	-1,630	-	-	-	-	1,620	-3,250
Thornbury/Clarksburg	-	*37.1*	*20%*	*29.7*	*20*	*590*	-
Other The Blue Mountains	-	*487.2*	-	-	-	*1,030*	-
Meaford	730	98.5	20%	78.8	20	1,580	-850
Georgian Bluffs	650	0.0	20%	0.0	20	0	650
Owen Sound	1,230	67.5	20%	54.0	25	1,350	-120
Total	**5,130**	-	-	-	-	**7,110**	**-1,980**

Units on Vacant Future Development Land

A number of Grey's area municipalities have designated Urban land for future urban use but have not applied specific land use designations to the land. The following approach was used to quantify the number of units that could be accommodated on Future Development land in the County of Grey by area municipality:

- The column entitled *Land with a Future Development Designation (gross hectares)* in *Table F.7* is based on the findings of the vacant land analysis presented in *Table F.2*.

- The following area municipality Official Plan land use designations were assumed to be Future Development designations:
  - *Development* designation in Neustadt in West Grey;
  - *Special Policy Area 'A' and 'B'* designation in Dundalk in Southgate;
  - *Future Development* designation in Hanover;
  - *Deferred Development* designation in Thornbury and Clarksburg.
- It was assumed that only 40% of the gross land area identified as Future Development would develop for residential uses. Applying this factor gives *Residential On Land With Future Development Designation (net hectares).*
- Residential units were assumed to develop at 20 units per net hectare.
- The result was an estimate of *Units on Future Development Land.*

Table F.7: Units on Vacant Future Development Land

	Units Required in Urban Area After Considering Units on Vacant	Land With A Future Development Designation (gross hectares)	Proportion Assumed to Develop as Net Residential Land	Residential On Land With Future Development Designation (net hectares)	Assumed Development Density (units per hectare)	Units On Future Development Land	Units Required in Urban Area After Considering Units on Future Development Land
West Grey	640	146.2	40%	58.5	20	1,170	-530
Durham	-	-	-	-	-	-	-
Neustadt	-	*146.2*	*40%*	58.5	*20*	*1,170*	-
Southgate	140	41.8	40%	16.7	20	330	-190
Grey Highlands	820	0.0	-	-	-	-	820
Hanover	-10	102.8	40%	41.1	20	820	-830
Chatsworth	-	-	-	-	-	-	-
The Blue Mountains	-3,250	31.7	40%	12.7	20	250	-3,500
Thornbury/Clarksburg	-	*31.7*	*40%*	*12.7*	*20*	*250*	-
Other The Blue Mountains	-	-	-	-	-	-	-
Meaford	-850	0.0	-	-	-	-	-850
Georgian Bluffs	650	0.0	-	-	-	-	650
Owen Sound	-120	0.0	-	-	-	-	-120
Total	**-1,980**	**322.5**	**-**	**129.0**	**-**	**2,570**	**-4,550**

Units on Vacant Urban Fringe Land

The County of Grey's Urban Fringe designation applies to land around a number of urban areas in West Grey, Grey Highlands, and Meaford. The following approach was used to quantify the number of units that could be accommodated on Urban Fringe land in the County of Grey by area municipality:

- The column entitled *Land With An Urban Fringe Designation (gross hectares)* in *Table F.8* is based on the findings of the vacant land analysis presented in *Table F.2.*
- Vacant Urban Fringe land in West Grey is located adjacent to Hanover, Markdale, Durham, and Mount Forest. Vacant Urban Fringe land in Grey Highlands is concentrated around Markdale. Vacant Urban Fringe land in Meaford is concentrated around the Meaford urban area.

- It was assumed that only 40% of the gross land area identified as Urban *Fringe* would develop for residential uses. Applying this factor gives *Residential On Land With Urban Fringe Designation (net hectares).*
- Residential units were assumed to develop at 20 units per net hectare.
- The result was an estimate of *Units on Urban Fringe Land.*

Table F.8: Units on Vacant Urban Fringe Land

	Units Required in Urban Area After Considering Units on Future Development Land	Land With An Urban Fringe Designation (gross hectares)	Proportion Assumed to Develop as Net Residential Land	Residential On Land With Urban Fringe Designation (net hectares)	Assumed Development Density (units per hectare)	Units on Urban Fringe Land	Units Required in Urban Area After Considering Units on Urban Fringe Land
West Grey	-530	804.6	40%	322	20	6,440	-6,970
Durham	-	*350.8*	*40%*	*140*	*20*	*2,810*	-
Neustadt	-	-	-	-	-	-	-
Other West Grey	-	*453.8*	*40%*	*182*	*20*	*3,630*	-
Southgate	-190	-	-	-	-	-	-190
Grey Highlands	820	51.9	40%	21	20	420	400
Hanover	-830	-	-	-	-	-	-830
Chatsworth	-	-	-	-	-	-	-
The Blue Mountains	-3,500	-	-	-	-	-	-3,500
Thornbury/Clarksburg	-	-	-	-	-	-	-
Other The Blue Mountains	-	-	-	-	-	-	-
Meaford	-850	379.0	40%	152	20	3,030	-3,880
Georgian Bluffs	650	-	-	-	-	-	650
Owen Sound	-120	-	-	-	-	-	-120
Total	**-4,550**	**1,235.5**	**-**	**-**	**-**	**-**	**-14,440**

F.3 Hamlet Residential Land Supply and Demand Test

The intent of the hamlet residential land supply and demand analysis was to test whether there was a sufficient amount of vacant land within each area municipalities' hamlets to accommodate a proportion of future permanent residential unit growth. The following tables present a series of calculations that first define the total amount of growth given to each area municipality then sequentially subtract supply to end with a final supply and demand balance. This analysis deals with permanent units and excludes those units that are considered to be seasonal. The analysis is based on growth allocated to each of the area municipalities between 2006 and 2031, as detailed in Section 4 of this report.

Growth Share Tests

The proportion of growth directed to Hamlets during this test represents the upper limit of growth that could be expected to locate in Hamlets between 2006 and 2031. The following proportions were tested:

- Hanover and Owen Sound do not have designated Hamlets, therefore, 0% of future unit demand was directed to Hamlets.
- Chatsworth does not have an Urban area, therefore, supply was assessed assuming 85% of future unit demand would be directed to Hamlets.
- For the remaining area municipalities, supply was assessed assuming 20% of future unit demand would be directed to Hamlets.

Table F.9: Permanent Units Required in Hamlets

	Total Residential Unit Demand 2006 to 2031	Proportion Directed to Hamlets	Units Required in Hamlets 2006 to 2031
West Grey	1,700	20%	340
Southgate	1,900	20%	380
Grey Highlands	1,800	20%	360
Hanover	800	0%	0
Chatsworth	800	85%	680
The Blue Mountains	1,300	20%	260
Meaford	1,200	20%	240
Georgian Bluffs	1,700	20%	340
Owen Sound	1,900	0%	0
Total	**13,100**	**-**	**2,600**

Intensification

Recognizing the importance and potential for the intensification of the built-up area, it was assumed that 5% of the units directed to Hamlets could be accommodated through conversions or redevelopment.

Table F.10: Units Created Through Intensification

	Units Required in Hamlets 2006 to 2031	Hamlet Intensification Potential	Units Created Through Intensification	Units Required in Hamlets After Considering Intensification
West Grey	340	5%	20	320
Southgate	380	5%	20	360
Grey Highlands	360	5%	20	340
Hanover	0	-	-	-
Chatsworth	680	5%	30	650
The Blue Mountains	260	5%	10	250
Meaford	240	5%	10	230
Georgian Bluffs	340	5%	20	320
Owen Sound	0	-	-	-
Total	**2,600**	**-**	**130**	**2,470**

Units in the Planning Process

There are an estimated 230 permanent residential units in the planning process in the County of Grey's Hamlets. These units will help to satisfy some of the unit demand projected to 2031. Details on the number of permanent units in the planning process are presented in Appendix G.

Table F.11: Units in the Planning Process

	Units Required in Hamlets After Considering Intensification	Units In Planning Process	Units Required in Hamlets After Considering Units In Plans
West Grey	320	0	320
Southgate	360	0	360
Grey Highlands	340	50	290
Hanover	-	-	-
Chatsworth	650	60	590
The Blue Mountains	250	0	250
Meaford	230	0	230
Georgian Bluffs	320	120	200
Owen Sound	-	-	-
Total	**2,470**	**230**	**2,240**

Units on Vacant Designated Hamlet Land

The following approach was used to quantify the supply of vacant designated Hamlet land in the County of Grey by area municipality:

- The column entitled *Gross Vacant Hamlet Land Excluding Constraints (gross hectares)* in *Table F.12* is based on the findings of the vacant land analysis presented in *Table F.2.*
- From the remaining developable residential land, 20% was assumed to be required for non-residential uses. Applying this factor gives *Vacant Designated Hamlet Land (net hectares).*
- Residential units were assumed to develop at 10 units per net hectare.
- The result was an estimate of *Units on Vacant Designated Hamlet Land.*

Table F.12: Units on Vacant Designated Hamlet Land

	Units Required in Hamlets After Considering Units In Plans	Gross Vacant Hamlet Land Excluding Constraints (gross hectares)	Assumed Proportion Used for Non-residential Uses (local, roads, parks, schools)	Vacant Designated Hamlet Land (net hectares)	Assumed Development Density (units per hectare)	Units On Vacant Designated Hamlet Land	Units Required in Hamlets After Considering Units on Vacant Hamlet Land
West Grey	320	261.1	20%	208.9	10	2,090	-1,770
Southgate	360	53.9	20%	43.1	10	430	-70
Grey Highlands	290	327.2	20%	261.7	10	2,620	-2,330
Hanover	-	-	-	-	-	-	-
Chatsworth	590	139.6	20%	111.6	10	1,120	-530
The Blue Mountains	250	20.9	20%	16.7	10	170	80
Meaford	230	55.1	20%	44.1	10	440	-210
Georgian Bluffs	200	125.8	20%	100.6	10	1,010	-810
Owen Sound	-	-	-	-	-	-	-
Total	**2,240**	**983.4**	**-**	**786.7**	**-**	**7,880**	**-5,640**

F.4 Rural Lots

In addition to the unit potential available in Urban areas and Hamlets, there is a significant amount of potential for additional units on existing rural lots of record. The following approach was used to quantify the number of units that could be accommodated in the County of Grey's rural areas by area municipality:

- There are an estimated 250 permanent residential units in the planning process outside of the County of Grey's Urban Areas and Hamlets. Details on the number of permanent units in the planning process are presented in Appendix G.
- The results of the vacant land analysis for Rural Lots was used and are presented in the column *Gross Vacant Hamlet Land Excluding Constraints (gross hectares).* In total, there are 7,730 vacant lots of record in the County of Grey.

Table F.13: Rural Lots

	Units in Planning Process	Vacant Lots of Record Outside of Urban Areas and Hamlets
West Grey	50	1,300
Southgate	40	840
Grey Highlands	10	1,350
Hanover	-	-
Chatsworth	0	970
The Blue Mountains	10	410
Meaford	110	1,270
Georgian Bluffs	30	1,590
Owen Sound	-	-
Total	**250**	**7,730**

F.5 Permanent Dwellings in Other The Blue Mountains

The methodology used to calculate the supply of permanent dwellings in Craigleith, Camperdown, Castle Glen, Swiss Meadows, Grandview, Lora Bay, and Osler (Other The Blue Mountains) differed from that employed in Thornbury and Clarksburg because of the large presence of seasonal units in those areas. *Table F.14* presents a summary of the unit supply for Thornbury/Clarkburg and Hamlets (analysis presented above) and details for the Other The Blue Mountains. The following assumptions were made to differentiate between permanent and seasonal dwellings in Other The Blue Mountains:

- The number of units in the planning process for Other The Blue Mountains was included in the County of Grey's *Units in Plans of Subdivision* database. A 36%/64% permanent/seasonal split was assumed in this analysis based on the Dwellings Occupied by Usual Resident statistics from the 2006 Census for these geographic areas (31%) with consideration given for a vacancy factor (5%).
- The number of units on vacant land were quanitified by using the Town's Official Plan *Schedule "B" – Unit Yields* and subtracting those parcels that were already identified as being in the planning process. The remaining unit potential was split 36% permanent and 64% seasonal based on the assumptions described above.

- As *Table F.14* demonstrates, we estimate that there is a supply of 3,780 permanent residential units in Thornbury/Clarksburg and Other The Blue Mountains, 180 units in Hamlets, and 420 lots in the Rural area.

Table F.14: Details on The Blue Mountains Permanent Supply

	Units Created Through Intensification	Units In Planning Process	Units On Vacant Land	Conversions	Total
Thornbury/Clarksburg	90	230	840	-	1,160
Other The Blue Mountains					
Permanent	-	*1,590*	*1,030*	-	2,620
Seasonal	-	*2,830*	*1,830*	-	4,660
Hamlets	10	0	170	-	180
Rural	0	10	410	-	420
Total Permanent	**100**	**1,830**	**2,450**	**780**	**5,160**
Total Seasonal	**-**	**2,830**	**1,830**	**-**	**4,660**

APPENDIX G

Permanent and Seasonal Units in the Planning Process

APPENDIX G Permanent and Seasonal Units in the Planning Process

This Appendix provides background data on the number of units in the planning process in the County of Grey by area municipality.

The County of Grey maintains a database of units in Plans of Subdivision/Condominium for each area municipality for which it has approval authority. More specifically, this includes all of its area municipalities excluding the City of Owen Sound. This database and data directly from Owen Sound was used to quantify the number of units in Plans of Subdivision/Condominium in the County.

In addition to units in Plans of Subdivision/Condominium, County and area municipality planning staff provided additional information pertaining to the expected build-out of particular communities. While some of the unit potential has been captured in Plans of Subdivision/Condominium, the information provided by planning staff gives additional details about the unit potential on some vacant land. Build-out information is summarized as:

- **Talisman, Grey Highlands** – 278 units, of which 74 are in Plans of Subdivision/Condominium
- **Lora Bay, The Blue Mountains** – 872 units, of which 186 are in Plans of Subdivision/Condominium
- **Castle Glen, The Blue Mountains –** 1,600 units, none of which are in Plans of Subdivision/Condominium
- **Cobble Beach, Georgian Bluffs** – 1,200 units, of which 491 are in Plans of Subdivision/Condominium

The total number of units in the planning process is summarized in *Table G.1*.

Table G.1: Total Planned and Proposed Residential Units

	Units in Plans of Subdivision/Condominium	Additional Build-Out Potential	Total Units in Planning Process
West Grey	256	-	256
Southgate	303	-	303
Grey Highlands	306	204	510
Hanover	71	-	71
Chatsworth	55	-	55
The Blue Mountains	2,389	2,286	4,675
Meaford	348	-	348
Georgian Bluffs	638	709	1,347
Owen Sound	382	-	382
Total Units	**4,748**	**3,199**	**7,947**

Source: County of Grey, Planning and Development Department Plans of Subdivision/Condominium, February 2007 and City of Owen Sound, Subdivision Location and Vacant Land, February 2007.

Also important to consider is the fact that some of the unit potential identified above is expected to be used as seasonal dwellings. To distinguish between permanent and seasonal unit potential, the following assumptions were made:

- For The Blue Mountains, the 233 units in Plans of Subdivision/Condominium in Thornbury and Clarksburg were assumed to be permanent dwellings. By comparison, 36% of the 4,429 planned or proposed units Lora Bay, Camperdown, Craigleith, Swiss Meadows, Castle Glen, and Osler were assumed to be permanent dwellings. The proportion of permanent to seasonal units is based on 2006 Census occupied dwelling data, which indicated that 31% of units in these communities were occupied by usual residents. Assuming a permanent vacancy rate of 5%, about 64% of the units can be considered to be used as seasonal dwellings.

- For Grey Highlands, the 278 units in Talisman are assumed to be for seasonal use.

- For Meaford, 42 units in Queen’s Bush Estate are assumed to be for seasonal use.

- For Georgian Bluffs, a third, or 400 units, of the 1,200 units planned in Cobble Beach are assumed to be seasonal. This distribution is based on guidance provided by Georgian Bluffs planning staff.

- For the other area municipalities, permanent unit potential is assumed to equal the total number of units in the planning process.

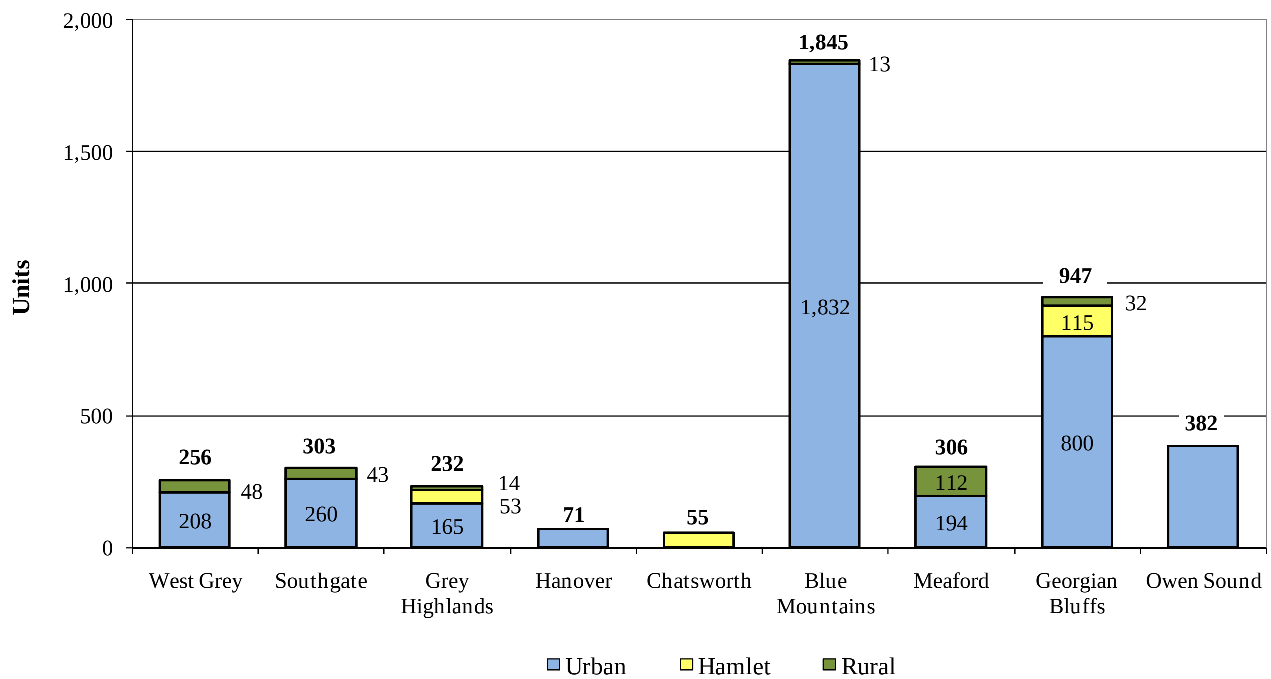
Based on these assumptions, there is a total of approximately 4,400 permanent units in the planning process in the County of Grey. *Table G.2* provides details on the number of permanent and seasonal units in the planning process.

Table G.2: Seasonal and Permanent Planned and Proposed Residential Units, 2007

	Total Units in Planning Process	Assumed Seasonal Units	Total Permanent Units
West Grey	256	-	256
Southgate	303	-	303
Grey Highlands	510	278	232
Hanover	71	-	71
Chatsworth	55	-	55
The Blue Mountains	4,675	2,835	1,840
Meaford	348	42	306
Georgian Bluffs	1,347	400	947
Owen Sound	382	-	382
Total Units	**7,947**	**3,555**	**4,392**

Of the 4,400 permanent units in the planning process in the County of Grey, a large proportion (89%) are located in urban areas. *Figure G.1* provides details on the number of permanent units by area municipality by urban, hamlet, and rural designation.

Figure G.1: Permanent Planned and Proposed Residential Units, 2007



Source: MGP; County of Grey, Planning and Development Department Plans of Subdivision and Condominium, February 2007; and, City of Owen Sound, Subdivision Location and Vacant Land, February 2007.

APPENDIX H

Responses to Area Municipality Comments

APPENDIX H Responses to Area Municipal Comments

The following table sets out area municipal comments on the draft *Preliminary Growth Allocations, Options and Issues Report* dated June 2007 and subsequent discussions held at a County of Grey Planning Committee meeting held July 23, 2007, the Directions Workshop held August 2, 2007, and the Growth Management Meeting held November 30, 2007. Comments have been organized by major theme. Beside each theme is the study team's response to the issue. The table is best read by reading the area municipal comments on each topic area first, then reading the responses.

Area Municipality Projections Are Too Low

Southgate	• The community is growing faster than it has in the past, possibly because of Greenbelt legislation. There is a concern that recent growth pressures cannot be detected through either historically based algorithms or an economic activity model.	• There was an opinion expressed by several area municipalities that the amount of growth allocated to their municipality was too low. • These opinions were based primarily on recent development activity, the general sense of developer and resident interest in their municipality, and the concern that growth is occurring faster than it has in the past. ○ Meaford's estimate of urban population growth is very high and is based on, in our opinion, very aggressive assumptions for growth. Building permit and new housing start data provided by the municipality indicate that an average of 66 to 69 residential units were built annually in the municipality from 2001. 2001 to 2006 Census data indicate that the municipality has grown by 113 people over the five year period. It is our position that the ppu's throughout the County will decrease over the forecast period. Under the municipality's growth forecast and our forecast for the County, Meaford's urban area would obtain 25% to 33% of the County's growth, a much greater share than we have seen in the past or could reasonably expect over the forecast period. ○ For the Blue Mountains, we recognized that there was an error in our 2006 post-censal population estimate and have made the necessary adjustments. The major difference between The Blue Mountain's population estimate and ours is the
Grey Highlands	• The population and dwellings projections for Grey Highlands may prove to be fairly accurate over time, however, population growth in Grey Highlands has outstripped previous projections.	
Hanover	• Difficult to assess how current projections align with Hanover because of different forecast years. • Past projections for 2021 for population were low given 2006 Census data. The recent Census data shows that the Town is maintaining positive growth and is not declining. • Growth projections may be difficult due to continued slight decrease to the average household size – influenced by single seniors moving to smaller bungalow style townhomes. • If the 2006 Census growth rate is maintained, the projected growth of 8,700 people by 2031 is a fairly good number, but may still be a bit low. Employment projection umbers appear reasonable based on comparisons with previous data.	
Meaford	• The projections in the draft report are insufficient to meet the long term needs of Meaford. The Municipality's forecasts indicates an increase in population of approximately 7,800 people by 2031 with a gradual shift in location (67-75%) to the Meaford Urban Area. • Provided indicators, factors and trends that support the greater population increase over the 25 year planning horizon:	

	○ Unit potential on *Urban Living Area* land is estimated at 8,356 units and on *Future Urban Expansion Area* land at 7,725 units, for a total of 16,081 units. At the current occupancy rate of 2.1 ppu, these units could accommodate 33,770 people. ○ Using Province of Ontario Ministry of Finance data for Grey and considering historical shares, the population of Meaford would be 13,485 by 2008, or an increase of 100 people per year. Housing data suggested the municipality was exceeding this at 145 people per year between 2001 and 2005. ○ The proportion of growth Meaford is receiving is increasing, a trend that will continue. ○ Persons per unit will increase from 2.1 to 2.5 over the forecast period as Meaford develops into a bedroom community to The Blue Mountains. The ppu is based upon a comparison with surrounding communities and in light of the policy direction towards the development of basement apartments, for which demand will increase with the need for affordable housing. ○ Housing starts will increase to 150 starts annually based on PPS direction to locate development on serviceable urban lands, anticipated effect of the new MDS calculations in reducing severances and development, anticipated effect of the Source Water Protection Act. ○ The amount of new housing starts in the urban area as a percentage of total housing starts will shift from 33% to 80% by 2011. ○ Given these assumptions, the population of the urban area will increase from an estimate of 4,796 in 2006 to 10,811 in 2031, an increase of 6,015 people. ○ Housing starts could be higher than 150 in Meaford given	treatment of seasonal residents and units occupied by usual residents. The projections presented in this report are for permanent residents only. Still, there is a difference of about 4,000 permanent residents by 2021 between the Town's Leisure Services Plan and this report. Under the municipality's growth forecast and our forecast for the County from 2006 to 2021, The Blue Mountains would obtain 32% of the County's growth over the forecast period, a much greater share than we have seen in the past or could reasonably expect over the forecast period. • We did not find that any of the arguments were compelling enough to reallocate growth amongst area municipalities. • Our projections are based on the top down economic prospects of each area municipality as well as historic growth data. We believe they accurately reflect the growth that can be expected to locate there over the forecast period. • We agree that there is a difference between MPAC residential units and the number of households Statistics Canada reported for the 2006 Census. Unfortunately, these figures never reconcile in any municipality. We always choose to use the Census data over MPAC data because it is subject to the most rigorous scrutiny. • Should there be significant differences between the projections and actual growth, these issues can be addressed in future Official Plan review processes.

	housing starts in The Blue Mountains and the market for lower density and lower cost housing. Starts could increase to 200 units annually. Under this assumption, Meaford's urban population could increase by 7,883 people.	Allocations are not intended to be set in stone until 2031.
The Blue Mountains	• Recognized that the 2006 population estimates were lower than Statistics Canada's. • Provided population projections from other reports and extrapolations based on 2006 Census data. ○ 2006 population figures from other reports and extrapolations ranged from 6,700 to 17,253. ○ 2021 population projections from other reports and projections range from 9,000 to 30,314. • MPAC data shows that there are many more residential units in the area municipalities than indicated in the base household data from the Census.	
Georgian Bluffs	• Generally the population assumptions are accurate, however they take a less optimistic approach to forecasting than we may wish to accept given more recent activity.	
Owen Sound	• Based on recent Census data results, growth projections for the City close to the "Economic Revival" scenario should be considered.	

Direct Growth to Fully-Serviced Urban Areas Before Considering Non-Settlement Growth

<table>
<tr>
<td>Hanover</td>
<td>Given the principles for growth management as defined in the Growth Plan for the Greater Golden Horseshoe, the direction for growth in the County should be towards the existing built-up and serviced areas. Both new growth and intensification should be directed to existing urban areas capable of providing full servicing to development which would include the Town of Hanover’s urban area and designated lands as well as its future development areas.
Given the growth associated with retail and service commercial uses in Hanover, we believe there is an opportunity and responsibility to direct growth on lands in and around existing developed nodes. This may involve expanding the existing urban area of the Town to accommodate additional development on full urban services. The expansion of the Town’s urban boundary (through annexation) should be seriously considered through the growth options. This will result in an increase in the share of population and employment allocated to the Town.</td>
<td rowspan="2">Hanover and Owen Sound expressed concerns that the County’s growth should be directed to fully-serviced urban areas prior to being allocated to rural areas.
While we did take into consideration reserve capacity for each of the area municipalities, available capacity was not used as a determinant for allocating growth. While we recognize that upgrades will have to be made over the forecast period to accommodate projected growth, a servicing strategy was beyond the scope of this exercise.
While we agree that growth should be focused as much as possible in Settlement Areas, our projection methodology and allocations recognize the challenges associated with:
The fact that Grey has a significant amount of vacant rural lots of record that could accommodate a large share of new growth;
The understanding that development trend data shows that the majority of growth is still locating outside of Settlement Areas despite policy encouraging it to go to Settlement Areas; and,
The lack of any policy device that can be used the prevent the market’s choice for rural housing or employment.
Policy recommendations include the need to strengthen and encourage growth to locate in Settlement Areas.</td>
</tr>
<tr>
<td>Owen Sound</td>
<td>A shift in County land use planning policy to be more restrictive in terms of rural plans of subdivision and rural non-farm lot creation and policies that direct growth and settlement to fully serviced settlement areas, prioritize development of brownfields etc consistent with the directions in the PPS will impact allocation of growth.
The approach used to project growth included a consideration for economic prospects, labour force requirements and migration. The impact of new County Official Plan policies that direct growth and settlement to fully serviced urban areas in accordance with the PPS should also have a significant impact on where growth and development happen.</td>
</tr>
</table>

	• Allocation of growth to unserviced settlement areas should only occur after growth has been allocated to serviced settlement areas. • Owen Sound is the largest urban centre and a full range of community services are found in Owen Sound for the entire region. Policies in the plan focusing growth to all fully serviced settlement areas within the County should be strengthened.	• The Growth Management Strategy puts forward growth related policies that will be further supported by additional policy recommendations prepared by County planning staff during the Official Plan review. These will include a review of servicing and rural severance policies.

Concerns About Rural Policy

Grey Highlands	• Some of the issues listed in the draft report seem difficult to address in a municipality that will increasingly depend on recreation-based economic growth, e.g. strengthening policies that direct growth to urban areas, or encouraging intensification (in urban areas). If demand for dwellings in country and recreational settlings continue, it may well be more productive to focus on other identified issues, such as encouraging compact development in those areas, and to develop policies and incentives to encourage communal servicing systems that are proven to be ecologically sound. • The difficulty for municipalities with significant environmental features is to achieve PPS and Official Plan objectives of focusing growth in settlements. While there are distinct economic/efficiency advantages to the municipality if growth is concentrated, consideration should be given to achieving some of those objectives in areas where the demand exists. • It is suggested that there is a need in communities like Grey Highlands to focus on managing rural growth and on ways to address the challenges of servicing rural residents.	• Comments received by area municipalities demonstrate the complicated growth-related concerns the County has to balance for both primarily urban and primarily rural area municipalities. • Urban municipalities see the advantage of directing the County's growth to urban areas by restricting lot creation in rural areas while predominantly rural municipalities indicate that stricter policies in rural locations would impair opportunities to diversify the farm-based economy and do not recognize the demand for the rural lifestyle. • Our projections and policy recommendations recognize that there is a demand for a rural lifestyle and employment in rural areas while also acknowledging the importance of encouraging growth to locate in Settlement Areas. • The County will be reviewing its rural and agricultural policies as part of the larger Official Plan

Georgian Bluffs	• Policies affecting alternatives for commercial/industrial activity should be reviewed. Too tight a control on the ability to create a range of lots may lead to loss of economic opportunities, limitations on affordable housing and options on the type of housing to choose from. • The Township is seeing a trend towards more 'home base business' which either support agricultural activity or relate to the demand for rural properties with space for home business activity. This is an important aspect in the rural-commercial policy development for this Township. Both of these trends would allow a retention of population in the rural area, supportive of the agricultural community. • Policies should be strengthened in the Official Plan to encourage employment opportunities in the hamlets and rural areas. If these opportunities are enabled, then the population is likely to increase at a higher rate than anticipated by this Report. However, it is recognized that the intent of this Report was not to address economic strategies and opportunities.	review and will be putting forward supplemental policies to support the strategy presented in this report. It should be noted that MDS must be implemented at the area municipality level. • The County has addressed issues of small scale commercial and industrial policies in an Official Plan review policy paper. • While multiple lots that have merged on title cannot be individually developed, they represent a small proportion of total supply. We are not concerned that these situations significantly influence supply estimates.
Owen Sound	• A shift in County land use planning policy to be more restrictive in terms of rural plans of subdivision and rural non-farm lot creation and policies that direct growth an settlement to fully serviced settlement areas, prioritize development of brownfields etc consistent with the direction in the PPS will impact allocation of growth.	
General	• Any policy options to discourage development on rural lots of record would be appreciated (i.e. applying MDS to existing lots of record, tiered system for development charges to influence growth – higher development charges for rural development).	

Seasonal vs. Permanent Unit Assumptions

<table>
<tr>
<td>The Blue Mountains</td>
<td>• The draft report tables excluded those units in the planning process that were located outside Thornbury and Clarksburg. Other urban areas of the municipality should be included in this study.
• Seasonal residents influence the population projections and should be considered in determining population projections.
• Have seasonal residents over the age of 55 been considered in determining the in-migration to the County?
• Will the study be looking at the influence of market and lifestyle trends in influencing growth?
• When considering employment in The Blue Mountains, most seasonal positions pay minimum or above minimum wages to employees which has an influence on the type of people immigrating to the area.</td>
<td rowspan="4">• The preliminary allocations analysis had assumed that residential unit potential in The Blue Mountains outside of Thornbury and Clarksburg and a portion of the unit potential in Cobble Beach’s Georgian Bluffs would serve primarily seasonal residents. Based on feedback from these municipalities, we have adjusted the unit supply by recognizing that a proportion of units in these areas will be occupied by permanent residents and are thus now included in permanent supply potential.
  ○ The methodology used to calculate permanent unit supply in The Blue Mountains is detailed in Appendix F and G.
  ○ The methodology used to calculate permanent unit supply in Cobble Beach is described in Appendix G.
• The projections took into consideration the influence of the increasing amount of tourism, seasonal residents, and retirees (TSR).
• The valid concerns about affordable housing for employees are dealt with in the policy recommendations.
• The permanent population and household allocations have not been skewed by treating seasonal units as permanent. They are kept separate but do recognize permanent occupancy in recreational oriented developments.
• We maintain that permanent growth projections must be distinguished from seasonal. We have, however, added a statement in the recommended policy</td>
</tr>
<tr>
<td>Georgian Bluffs</td>
<td>• Cobble Beach must be recognized as an urban centre and will require an allocation of growth, recognizing that only a portion (one-third) may be seasonal or part-time residents.
• If Cobble Beach is added into the Urban Centre, with approximately 40% seasonal, the new figures would more accurately reflect supply.</td>
</tr>
<tr>
<td>Owen Sound</td>
<td>• The allocations should consider seasonal units and differentiate between areas that will have a high allocation of seasonal units and areas with few seasonal units. This would allow for a truer allocation of permanent units.</td>
</tr>
<tr>
<td>General</td>
<td>• Seasonal dwellings are not being treated the same as permanent dwellings. This is of concern because they require services and causing servicing pressures. Seasonal numbers should be treated the same as permanent numbers, thereby impacting the overall growth numbers for areas that are experiencing a high percentage</td>
</tr>
</table>

	of seasonal growth.	revisions that projections, "are not intended to regulate seasonal recreational development."

Urban vs. Rural Growth Target Assumptions

<table>
<tr><td>Grey Highlands</td><td>The preliminary Urban Residential Land Requirements chart apportions a projected demand of 1,900 units 85%/15% to urban areas/hamlets.
Very little residential development has occurred in urban settlements in Grey Highlands over the past five years.
Grey Highlands is experiencing difficulty attracting significant growth to urban settlements. This is despite policies and zoning provisions that limit consents. The urban structure of Grey Highlands is based on the historic agricultural community.</td><td rowspan="3">The preliminary allocations report tested the available supply of residential land in urban areas using aggressive estimates of 85%/15% urban/rural in most of the area municipalities.
We agree that this estimate is much higher than past trends suggest is possible, particularly when considering the supply of vacant lots in non-settlement areas. We do not believe it could be any higher.
This split was used to test supply only. Less aggressive Settlement Residential Growth Targets have been established and included as a policy recommendation. Our recommendations now address settlement oriented targets only.
Policy recommendations dealing with the on-going monitoring of development trends in Settlement would help inform the County about the success of achieving targets during 5-year Official Plan reviews.</td></tr>
<tr><td>Georgian Bluffs</td><td>If Urban vs. Rural targets are established it should be clear that these are subject to review every five years, similar to the Official Plan and are estimated or goals only.</td></tr>
<tr><td>Owen Sound</td><td>For Owen Sound and Hanover, 100% of the dwelling growth is directed to settlement areas. For other areas, the percentage of growth allocated to settlement areas is 85%. Unless this is done to reflect existing lots of record, this percentage should be higher for all municipalities.</td></tr>
</table>

Development Density Assumptions

Owen Sound	• Density of 25 units per hectare is likely high for Owen Sound. Hanover, a fully serviced area, was estimated using 20. It is also likely that the density for areas without servicing should be much lower than 20 units per hectare. • The current zoning by-law does not allow for a 36' by 110' lot size to occur based on the proposed density.	• We believe 25 units per net hectare is an appropriate development density to use for Owen Sound. This is an average figure that would be shaped by Official Plan policies enabling such development. • Development densities for other urban areas were assumed to be lower at 20 units per net hectare. • Development densities in Hamlets were assumed to be much lower at 10 units per net hectare.

Area Municipality Specific Comments

Southgate	• Provided examples of recent development activity and future plans, including the potential to relay tracks through the Industrial Park and discussions with Wellington North and West Grey concerning fringe development and joint servicing.	• We recognize that Southgate is experiencing growth pressures. The municipality is projected to have the greatest population and household growth of all of the County of Grey's area municipalities over the forecast period.
Hanover	• Provided details about supply. • At the current growth rates, the Towns does not have sufficient lands available for the future service commercial/industrial growth. This trend has also led to a decreased supply of available commercial lands in and around the current easterly retail and service commercial nodes which appears to have resulted in inflated vacant land values further constraining supply.	• It is difficult to directly compare the vacant land supply identified through this analysis with the supply provided by Hanover because this analysis removed some land for built and natural constraints. That said, it appears that the supply numbers are similar. • It was beyond the scope of this study to evaluate the supply and distribution of commercial lands by area municipality. This exercise would need to be completed on a municipality by municipality basis. • Our analysis indicates that there is a sufficient supply of urban land to accommodate projected growth in the municipality.

The Blue Mountains	• Provided specific references to edit, changes or additions to the draft report text. • Should there be a reference to development of brownfield sites? The Town is presently exploring a study that will identify such sites and develop a Community Improvement Plan.	• Editorial comments were taken into consideration and incorporated into the text where appropriate. • Policy recommendations address the issues of encouraging intensification and redevelopment, including on Brownfield sites.
Georgian Bluffs	• There has been no allocation of 'urban' lands within the Township based upon the existing Official Plan Designations. • Clarification of the assumptions made for Cobble Beach. 'Cobble Beach' has been considered as a hamlet and seasonal; it should be included in the "Urban Land Requirements" as it is a fully serviced community with residential, commercial and perhaps even institutional uses in the future. • Tables should be adjusted to accurately reflect the influence of Cobble Beach as our Urban Land Area, with the 1,900 households adjusted accordingly upward to recognize that three-quarters of all residents will be permanent. Further, the number (of households) allocated to the rural areas should remain, as the increase in home based business's and tourism opportunities will likely allow more agricultural families to remain in the rural area as well as younger people to have opportunities to remain or return home. • Cobble Beach must be recognized as an urban centre and will require an allocation of growth, recognizing that only a portion (one third) may be seasonal or part-time residents. • If Cobble Beach is added into the Urban Centre, with approximately 40% seasonal, the new figures would more accurately reflect supply. • The area shown as Hamlet (in the Official Plan) may be somewhat misrepresentative if the hectarage is taken without regard to constraints. There should be an assessment of the	• We acknowledge that we had incorrectly treated Cobble Beach as a Hamlet rather than an Urban Area. The change has been reflected in the updated report. Based on the municipality's recommendation, we have assumed that one-third of the residential units will be occupied by seasonal residents and two-thirds are permanent residences. • Though not explicitly stated in the Preliminary Report, Natural and Built Constraints were removed from vacant land in Hamlets. • The share of the County's commuters from Georgian Bluffs in 2001 is presented in Figure 4.1 of this report. The influence of commuters was considered when generating area municipality projections.

	actual lands available for development so that land with a Hamlet designation is accurately reflected. • Constraints to development may impair use of some lands within hamlets, therefore supply is overestimated. • The Consultant had considered that this Township was not influenced by the commuter potential that some of the southern townships would feel. The report did not indicate how people in Georgian Bluffs who commute to work elsewhere were recognized. So, the opportunities in abutting municipalities plays a role, perhaps lesser than in the south, however, does impact employment in Georgian Bluffs.	
Owen Sound	• Provided policy recommendations.	• Some of the recommendations are part of the policy recommendations put forward in the Growth Management Strategy report. Others will have to be addressed by the County during the larger Official Plan review process.

Interest in On-going Involvement

<table>
<tr><td>Grey Highlands</td><td>• It is suggested that growth allocations and associated issues referred to in this report be further discussed, prior to the completion of the Growth Management Strategy.</td><td rowspan="2">• It is expected that the Growth Management Strategy will roll into the larger Official Plan review process. Area Municipalities will have an opportunity to comment on policy recommendations during the larger review process.</td></tr>
<tr><td>Owen Sound</td><td>• Looks forward to an opportunity to review the draft final report prior to final approval.</td></tr>
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