

# GROWTH MANAGEMENT STRATEGY UPDATE

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December 17, 2015



## EXECUTIVE SUMMARY

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The County of Grey has retained Hemson Consulting Ltd. to update the County's Growth Management Strategy (GMS), 2008. Population, housing and employment forecasts from 2011 to a 2041 horizon have been prepared, along with local allocations of forecast growth to local municipalities within Grey. A review and update to the GMS land supply information was undertaken and recommendations made for updates to the *Grey County Official Plan*.

Key study findings include:

- Grey County has grown modestly over the past decade, with limited population growth and a small decline in employment. Housing growth has been outpacing growth in residents, an outcome of the aging demographic trend. The growth which has been occurring in the County has been unevenly distributed among Grey's nine local municipalities.
- Three forecast scenarios were prepared based on varying assumptions about future levels of in-migration. A low, a reference and a high scenario provide a range on the County's future growth outlook. The reference scenario represents the most likely outcome for Grey and was endorsed by County staff following consultation with local municipal planning staff.
- The GMS update is undertaken within the context of the Provincial Policy Statement (PPS). An updated PPS came into effect in April, 2014 with a number of strengthened directions and considerations in planning for anticipated growth and development in Grey.
- A review and update of the County-wide land supply inventory was undertaken indicating sufficient supply to accommodate forecast growth, County-wide and within each of Grey's local municipalities. Changes to settlement area boundaries are not being proposed at this time.
- The County-wide reference growth forecast is allocated to local municipalities in Grey taking into consideration a range of planning policy, historic growth and recent development trends and land supply and servicing capacities. 2016 to 2036 is highlighted as it represents a twenty-year planning horizon for subsequent updates to the *Grey County Official Plan*.



- Forecast results are summarized below.

Forecast Census Population by Local Municipality Grey County, 2011 - 2041							
Municipality	Census Population					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	6,450	6,850	8,130	8,460	8,700	1,610	1.06%
Chatsworth	6,440	6,550	6,950	7,080	7,160	530	0.39%
Georgian Bluffs	10,400	10,840	11,870	12,140	12,330	1,300	0.57%
Grey Highlands	9,520	9,800	10,850	11,090	11,290	1,290	0.62%
Hanover	7,490	7,620	8,190	8,370	8,480	750	0.47%
Meaford	11,100	11,260	12,310	12,620	12,840	1,360	0.57%
Owen Sound	21,690	21,740	23,010	23,520	23,880	1,780	0.39%
Southgate	7,190	7,380	8,130	8,330	8,470	950	0.61%
West Grey	12,290	12,620	13,510	13,780	13,960	1,160	0.44%
<b>Grey County</b>	<b>92,570</b>	<b>94,660</b>	<b>102,950</b>	<b>105,390</b>	<b>107,110</b>	<b>10,730</b>	<b>0.54%</b>

Forecast Total Population by Local Municipality Grey County, 2011 - 2041							
Municipality	Total Population (includes Census Net Undercoverage)					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	6,610	7,010	8,320	8,660	8,910	1,650	1.06%
Chatsworth	6,590	6,700	7,120	7,250	7,330	550	0.40%
Georgian Bluffs	10,650	11,090	12,150	12,430	12,630	1,340	0.57%
Grey Highlands	9,750	10,040	11,110	11,360	11,560	1,320	0.62%
Hanover	7,670	7,800	8,390	8,570	8,690	770	0.47%
Meaford	11,360	11,530	12,600	12,920	13,150	1,390	0.57%
Owen Sound	22,200	22,250	23,550	24,080	24,460	1,830	0.40%
Southgate	7,360	7,560	8,330	8,530	8,670	970	0.61%
West Grey	12,580	12,920	13,830	14,110	14,300	1,190	0.44%
<b>Grey County</b>	<b>94,770</b>	<b>96,900</b>	<b>105,400</b>	<b>107,910</b>	<b>109,700</b>	<b>11,010</b>	<b>0.54%</b>

Housing Unit Forecast by Local Municipality Grey County, 2011-2041							
Municipality	Housing Units (Occupied Households)					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	2,850	3,060	3,700	3,850	3,960	790	1.15%
Chatsworth	2,480	2,560	2,740	2,780	2,810	220	0.41%
Georgian Bluffs	4,100	4,330	4,810	4,890	4,970	560	0.61%
Grey Highlands	3,750	3,920	4,410	4,510	4,580	590	0.70%
Hanover	3,180	3,270	3,530	3,600	3,650	330	0.48%
Meaford	4,640	4,780	5,290	5,410	5,500	630	0.62%
Owen Sound	9,610	9,750	10,390	10,580	10,740	830	0.41%
Southgate	2,640	2,750	3,050	3,120	3,170	370	0.63%
West Grey	4,880	5,090	5,530	5,620	5,700	530	0.50%
<b>Grey County</b>	<b>38,130</b>	<b>39,510</b>	<b>43,450</b>	<b>44,360</b>	<b>45,080</b>	<b>4,850</b>	<b>0.58%</b>



Forecast Total Employment by Local Municipality Grey County, 2011 - 2041							
Municipality	Total Place of Work Employment					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	4,000	4,170	4,210	4,330	4,500	160	0.19%
Chatsworth	1,650	1,710	1,730	1,780	1,850	70	0.20%
Georgian Bluffs	3,010	3,170	3,200	3,280	3,430	110	0.17%
Grey Highlands	3,780	3,940	3,970	4,080	4,270	140	0.17%
Hanover	6,000	6,190	6,230	6,370	6,600	180	0.14%
Meaford	3,330	3,420	3,450	3,540	3,690	120	0.17%
Owen Sound	15,130	15,500	15,590	15,940	16,500	440	0.14%
Southgate	1,980	2,070	2,090	2,160	2,280	90	0.21%
West Grey	3,150	3,300	3,340	3,430	3,600	130	0.19%
<b>Grey County</b>	<b>42,030</b>	<b>43,470</b>	<b>43,810</b>	<b>44,910</b>	<b>46,720</b>	<b>1,440</b>	<b>0.16%</b>

- The results of the updated outlook on seasonal and recreational units is shown below.

Growth Outlook for Seasonal Recreational Units Grey County by Local Municipality, 2016 - 2036			
Municipality	Estimated Seasonal Recreational Units		
	2011	2036	Net Change
Blue Mountains	3250	4300	1050
Chatsworth	390	440	50
Georgian Bluffs	770	900	130
Grey Highlands	1500	1770	270
Hanover	0	0	0
Meaford	670	760	90
Owen Sound	0	0	0
Southgate	270	310	40
West Grey	580	670	90
<b>Grey County</b>	<b>7430</b>	<b>9150</b>	<b>1720</b>



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# I INTRODUCTION

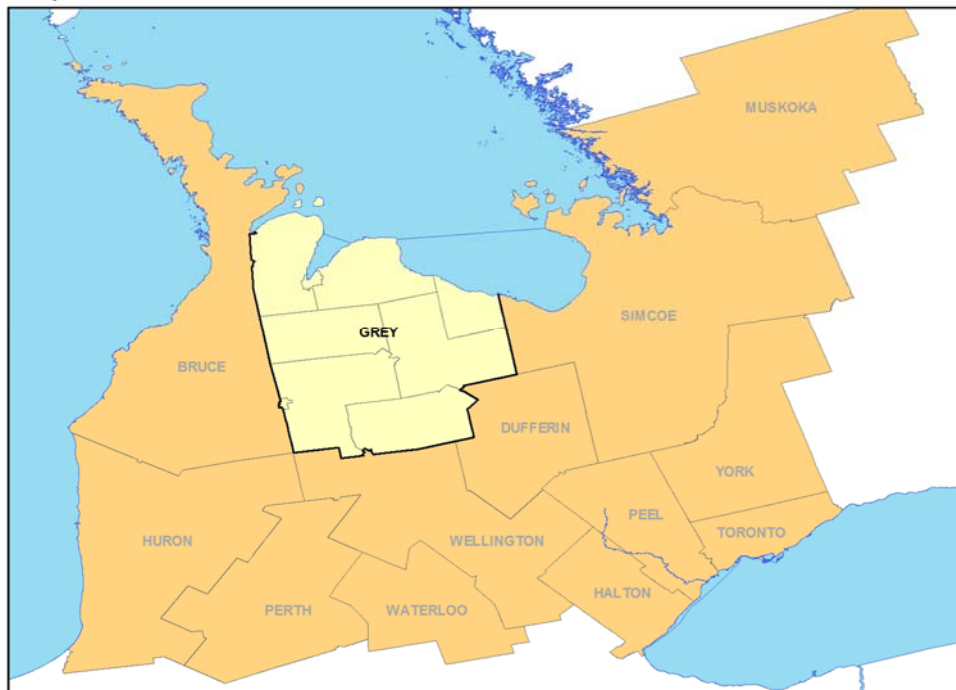
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The County of Grey (the County) has retained Hemson Consulting Ltd. to update the County's Growth Management Strategy (GMS), 2008. The project involves the preparation of updated population, housing and employment forecasts from 2011 to a 2041 horizon. It also includes a review and update of the GMS land supply information, allocation of forecast growth to local municipalities in Grey and recommendations for updating the *Grey County Official Plan*. The GMS update is undertaken within the context of the Ontario planning policy framework, notably the Provincial Policy Statement (PPS), 2014.

## A. BACKGROUND

Grey is located on the shoreline of Georgian Bay surrounded by Bruce County to the west, Wellington and Dufferin to the south and Simcoe County to the east. Covering more than 4,500 km<sup>2</sup>, the County is an expansive, largely rural, upper-tier municipality, with extensive agricultural areas, natural amenities and shoreline.

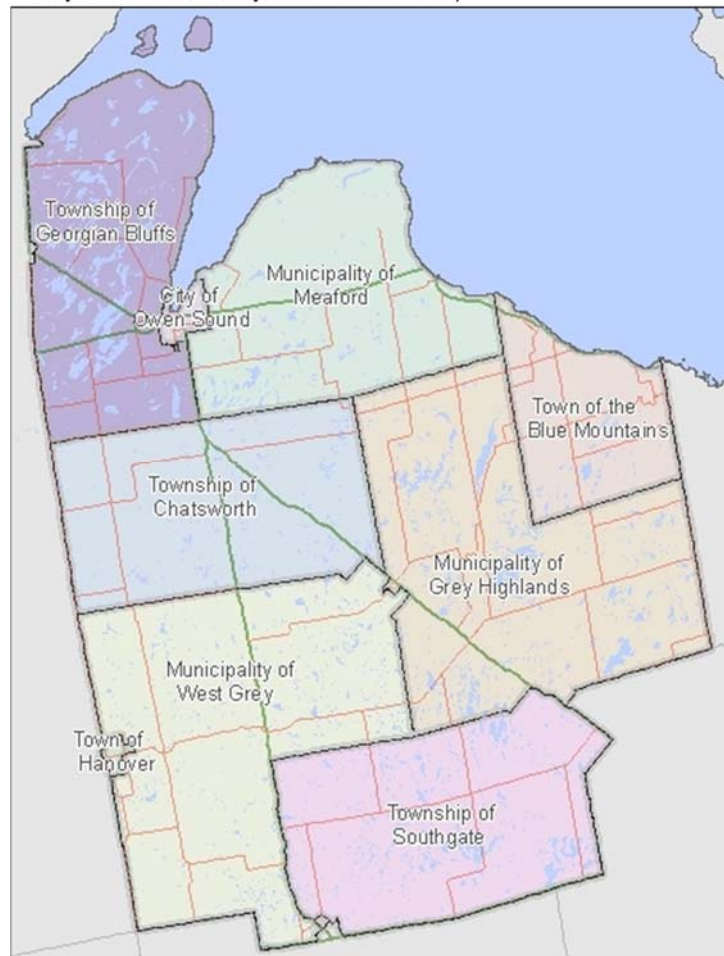
Map 1: COUNTY OF GREY IN A SOUTHERN ONTARIO CONTEXT





The County comprises nine lower-tier municipalities including urban and rural communities across 57 settlement areas with varied local demographic, economic and geographic characteristics and a range of servicing capacities, population size, economic function and natural and recreational amenity.

**Map 2: Local Municipalities within Grey**



Through the *Grey County Official Plan*, the County sets out broad policy objectives for managing growth and development across Grey's diverse communities over the long-term. This includes allocating the projected population, housing and employment growth that is used as a basis for planning County services, in local official plans and a for range of other planning and service delivery initiatives.



## **B. STUDY PURPOSE**

The updated GMS will inform updates to the *Grey County Official Plan* and will help to ensure that the County is adequately planning for future growth and development in a manner consistent with Provincial planning policy.

Key considerations for the GMS update include:

- The forecasts which formed the basis for the GMS were in large part based on 2006 Statistics Canada Census information on population and housing and 2001 Census data on employment. The current GMS update is informed by more recent information on demographic and economic conditions, notably the results from the 2011 Census and National Household Survey.
- The current update provides an important opportunity to re-evaluate growth prospects in Grey based on the most current available data. The County has experienced slower growth in recent years than was anticipated through the 2008 GMS forecasts, thus an update to understand how the County is currently growing and to realistically assess the future outlook is timely.
- The update also provides an important opportunity to evaluate how recent development occurring since the 2008 GMS has changed the County's designated land supply.
- The Province released an updated PPS which took effect on April 30, 2014. Among other matters, the updated PPS provides additional clarity around municipal comprehensive reviews, employment land planning and planning for rural areas. The study is being undertaken within the context of this updated Provincial policy.

The GMS update provides a basis for planning policy that is grounded in a realistic growth outlook responsive to demographic change and an evolving economic base. It will support the County's planning efforts to achieve healthy and sustainable population and employment growth over the long-term.

## **C. REPORT CONTENTS**

This report examines recent growth and change in the County, provides the results of the updated County-wide growth forecasts and land supply review and presents local



allocations of forecast growth to municipalities in Grey. Recommendations are made for updating the *Grey County Official Plan* consistent with Provincial policy.

Following this introductory section, the balance of this report is divided into five sections:

- **Section II** examines the level and distribution of population, housing and employment growth which has been occurring in Grey over recent Census periods and discusses demographic and economic trends affecting the pattern and pace of growth;
- **Section III** discusses the forecast method and underlying assumptions and presents the results of the County-wide forecasts of population, housing and employment;
- **Section IV** describes the policy context for allocating growth to local municipalities in Grey, examines recent residential development activity, presents the results of the updated land supply inventory and capacity analysis and provides commentary on input received from local municipal and industry stakeholders;
- **Section V** presents the results of the local municipal forecast growth allocation and an outlook on seasonal recreational units; and
- **Section VI** provides summary conclusions and recommendations for updating the Grey County Official Plan to incorporate the results of the GMS update.



## II RECENT GROWTH HAS BEEN MODEST AND UNEVENLY DISTRIBUTED THROUGHOUT GREY

Grey County has grown modestly over the past decade but with limited population growth and a small decline in employment during the recent recession dominated period. Housing growth has been outpacing growth in residents over the last decade, an outcome of the aging demographic trend and resulting decline in average household size. The growth which has been occurring in the County has been unevenly distributed among Grey's nine local municipalities. This section discusses recent population, housing and employment growth in the County in the context of broader demographic and economic trends and examines where and how this growth has been experienced throughout Grey.

### A. RECENT POPULATION GROWTH HAS BEEN MODEST

Population growth in Grey has slowed over recent Census periods. As shown in Table 1 below, the County added 3,500 residents between 2001 and 2011, growing by 3.9%. Most of this growth occurred between 2001 and 2006; since then Grey has experienced much more modest growth, adding 200 residents over the most recent Census period from 2006 to 2011.

<div> <div>Table 1</div> <div>Historical Population Growth County of Grey, 2001-2011</div> </div>						
Year	Census Population	Net Change	Compound Annual Growth Rate	Total Population*	Net Change	Compound Annual Growth Rate
2001	89,100	--	--	92,600	--	--
2006	92,400	3,300	0.7%	95,400	2,800	0.6%
2011	92,600	200	0.0%	94,800	(600)	-0.1%
<b>2001-11</b>		<b>3,500</b>			<b>2,200</b>	

Source: Statistics Canada.

\*Includes Census Net Undercoverage

Figures are rounded.

Growth in the County has been unevenly distributed among Grey municipalities, with some communities declining in population over the most recent 2006 to 2011 Census



period. Tables 2 and 3 below indicate the change in Census and total population by local municipality from 2001 to 2011.

Historical Census Population by Local Municipality Grey County, 2001 - 2011								Table 2
Municipality	2001	2006	2011	2001-2006		2006-2011		Share of County-wide 01-11 Growth
				Net Change	Compound Annual Growth Rate	Net Change	Compound Annual Growth Rate	
Blue Mountains	6,120	6,830	6,450	710	2.22%	(380)	-1.14%	9%
Chatsworth	6,280	6,390	6,440	110	0.35%	50	0.16%	5%
Georgian Bluffs	10,130	10,510	10,400	380	0.74%	(110)	-0.21%	8%
Grey Highlands	9,200	9,480	9,520	280	0.60%	40	0.08%	9%
Hanover	6,870	7,150	7,490	280	0.80%	340	0.93%	18%
Meaford	10,380	10,950	11,100	570	1.07%	150	0.27%	21%
Owen Sound	21,460	21,750	21,690	290	0.27%	(60)	-0.06%	7%
Southgate	6,910	7,170	7,190	260	0.74%	20	0.06%	8%
West Grey	11,740	12,190	12,290	450	0.76%	100	0.16%	16%
<b>Grey County</b>	<b>89,100</b>	<b>92,400</b>	<b>92,600</b>	<b>3,300</b>	<b>0.73%</b>	<b>200</b>	<b>0.04%</b>	<b>100%</b>

Source: Statistics Canada Census data.

Figures are rounded and may not add.

Historical Total Population by Local Municipality Grey County, 2001 - 2011								Table 3
Municipality	2001	2006	2011	2001-2006		2006-2011		Share of County-wide 01-11 Growth
				Net Change	Compound Annual Growth Rate	Net Change	Compound Annual Growth Rate	
Blue Mountains	6,360	7,050	6,610	690	2.08%	(440)	-1.28%	11%
Chatsworth	6,530	6,600	6,590	70	0.21%	(10)	-0.03%	3%
Grey Highlands	9,560	9,790	9,750	230	0.48%	(40)	-0.08%	9%
Georgian Bluffs	10,520	10,850	10,650	330	0.62%	(200)	-0.37%	6%
Hanover	7,140	7,380	7,670	240	0.66%	290	0.77%	24%
Meaford	10,790	11,300	11,360	510	0.93%	60	0.11%	26%
Owen Sound	22,290	22,460	22,200	170	0.15%	(260)	-0.23%	-4%
Southgate	7,180	7,400	7,360	220	0.61%	(40)	-0.11%	8%
West Grey	12,200	12,590	12,580	390	0.63%	(10)	-0.02%	17%
<b>Grey County</b>	<b>92,600</b>	<b>95,400</b>	<b>94,800</b>	<b>2,800</b>	<b>0.60%</b>	<b>(600)</b>	<b>-0.13%</b>	<b>100%</b>

Source: Statistics Canada Annual Demographic Statistics.

Note: Historical Total Population includes Census Net Undercoverage.

Figures are rounded and may not add.

Key observations include:

- Most municipalities did continue to experience population growth over both Census periods however with a slowing growth trend.
- Hanover, Meaford and West Grey experienced the highest levels and rates of population growth over the ten years from 2001 to 2011 with growth in the



more recent 2006 to 2011 period occurring amidst a slowing growth trend and decline in other parts of the County.

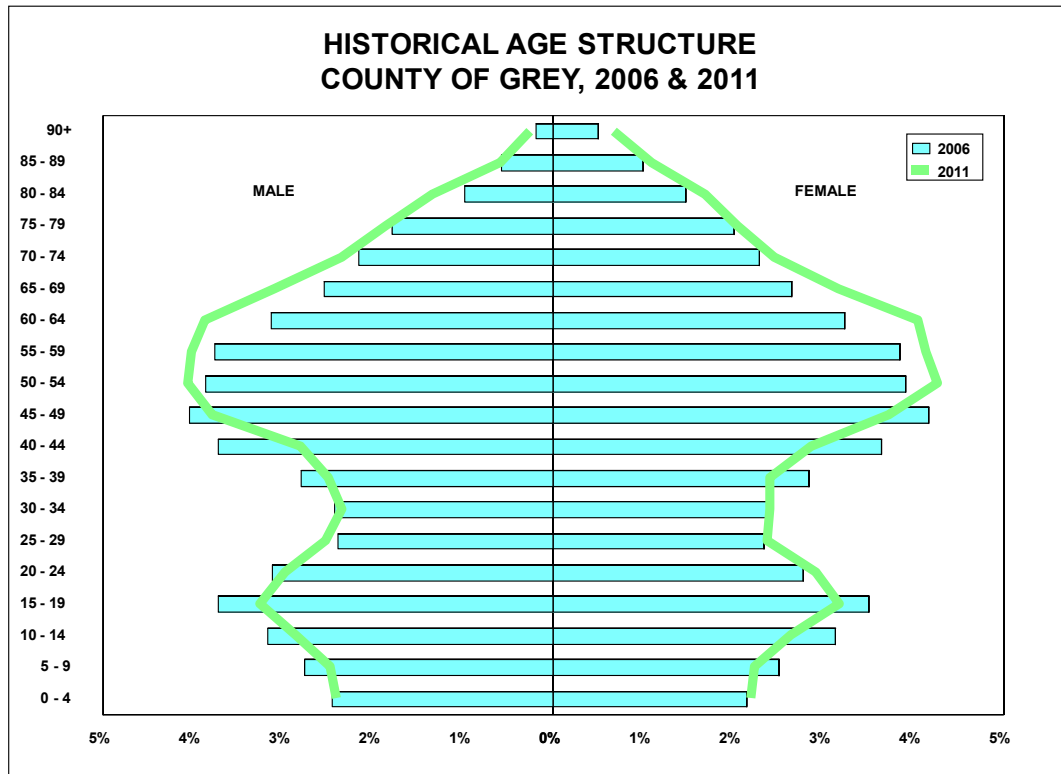
- Population declined in the municipalities of Owen Sound, Blue Mountains and Georgian Bluffs between 2006 and 2011. Over the ten-year period, Chatsworth and Owen Sound experienced the lowest levels and relative shares of County-wide population growth.
- The Town of The Blue Mountains went from being the highest growth municipality between 2001 and 2006 to experiencing the greatest decline in population among Grey municipalities over the more recent 2006 to 2011 period, in part owing to the high prevalence of seasonal and recreational units – the occupancy pattern of these types of units tend to shift back and forth between seasonal and permanent over time.
- Georgian Bluffs also went from one of the higher growth municipalities to declining in population more recently.

## **B. GREY'S POPULATION IS AGING**

During the more recent slower growth period, the County's population continued to age, a trend occurring throughout Ontario, in particular in areas outside of the major urban centres. The aging demographic trend is anticipated to continue and will have important implications for planning in Grey County.

The shift in the County's age structure which occurred between 2006 and 2011 is shown in Exhibit 1 on the following page.



**Exhibit 1: Age Structure, County of Grey, 2006 & 2011**

Source: Hemson Consulting Ltd. based on Statistics Canada 2006 & 2011 Census.

The most striking aspect of the graph is the pronounced reduction in the number of people in their 20's and 30's relative to those older and younger. This is the result of the combined effect of the “baby bust” generation and the continued out-migration of young adults. Over the long-term, the aging of the baby boom “bulge” in the population and the continued out-migration of young adults will combine to rapidly increase the median age of Grey residents.

### C. HOUSING GROWTH OUTPACING POPULATION

Housing growth in Grey County has outpaced growth in population over the last Census period, owing to the aging population and resulting decline in average household size. An older population forms more households because they have fewer children and are more likely to be divorced or widowed (where women still typically live longer than their male spouses). The result is a greater proportion of “empty-nester” households and of single-person households. Therefore, housing growth out-



paces growth in population. Going forward, it is expected that any growth in new units would accommodate proportionally less population overall.

The recent decline in persons per unit in Grey County is shown in Table 4 below.

Table 4 Average Persons Per Unit County of Grey, 2001-2011	
2001	2.46
2006	2.46
2011	2.41

The decline in average household size means that fewer people will be housed in the County's existing housing base and more units will be required to accommodate less future population.

As shown in Table 5 below, the County added 800 households between 2006 and 2011, while growing by a modest 200 residents over the same time frame. While still outpacing growth in population, growth in households also slowed somewhat between 2006 and 2011 in comparison with the level of growth that occurred during the 2001 to 2006 period.

Table 5 Historical Occupied Housing Units County of Grey , 2001 - 2011			
Year	Households	Net Change	Compound Annual Growth Rate
2001	35,300	--	--
2006	37,200	1,900	1.1%
2011	38,000	800	0.4%

Source: Statistics Canada.

Figures are rounded.

Although each growing at different rates over the two Census periods, the overall shares of housing growth which occurred between 2001 and 2011 in the County were relatively balanced among Grey's local municipalities, as shown in Table 6.



Table 6								
Historical Occupied Households by Local Municipality Grey County, 2001-2011								
Municipality	Occupied Households			2001-2006		2006-2011		Share of 01-11 County-wide Growth
	2001	2006	2011	Net Change	Compound Annual Growth Rate	Net Change	Compound Annual Growth Rate	
Blue Mountains	2,600	2,950	2,850	350	2.56%	(100)	-0.69%	9%
Chatsworth	2,230	2,380	2,480	150	1.31%	100	0.83%	9%
Georgian Bluffs	3,740	4,040	4,100	300	1.56%	60	0.30%	13%
Grey Highlands	3,560	3,700	3,750	140	0.77%	50	0.27%	7%
Hanover	2,920	3,040	3,180	120	0.81%	140	0.90%	10%
Meaford	4,200	4,450	4,640	250	1.16%	190	0.84%	16%
Owen Sound	9,200	9,380	9,610	180	0.39%	230	0.49%	15%
Southgate	2,430	2,580	2,640	150	1.21%	60	0.46%	8%
West Grey	4,520	4,740	4,880	220	0.96%	140	0.58%	13%
Grey County	35,300	37,200	38,000	1,900	1.05%	800	0.43%	100%

Source: Statistics Canada Census data.  
Figures are rounded and may not add.

Key observations include:

- All local municipalities with the exception of the Town of The Blue Mountains added households over both Census periods between 2001 and 2011.
- The Blue Mountains, despite declining in households over the 2006 to 2011 period, still accounted for nearly 10% of the County-wide household growth over the Census decade as well as being the highest growth municipality in terms of total housing units.
- The highest rates of household growth in the most recent Census period were in the municipalities of Hanover, Meaford and Chatsworth.
- Taken together, the municipalities of Owen Sound, West Grey, Meaford and Georgian Bluffs accounted for roughly 60% of the County's growth in households over the 2001 to 2011 period, with the balance split evenly among the County's other local municipalities.
- The municipalities of Georgian Bluffs and Owen Sound continued to add households between 2006 and 2011 despite declining in population, indicative of an aging population.

## 1. Housing Mix

The existing housing stock as well as new housing growth by type in the County has been characterized by predominance in single detached dwellings, as shown in Table



7 below. The housing unit mix has remained relatively constant since 2001 at roughly 79% single family dwellings, 2% semi-detached units, 4% row houses and 15% apartments.

<div>Table 7</div> <div>Housing Mix</div> <div>County of Grey, 2001-2011</div>				
Year	Single	Semi-detached	Rowhouse	Apartment
2001	79%	2%	3%	16%
2006	79%	2%	3%	16%
2011	79%	2%	4%	15%

Again, there is variation at the local level in response to the unique settlement area characteristics of communities within Grey. The housing mix by local municipality is shown in Table 8 below.

<div>Table 8</div> <div>Housing Mix by Local Municipality</div> <div>Grey County, 2001 &amp; 2011</div>								
Municipality	2001				2011			
	Single	Semis	Rows	Apt	Single	Semis	Rows	Apt
Blue Mountains	87%	1%	5%	8%	84%	2%	7%	6%
Chatsworth	95%	1%	0%	4%	96%	1%	0%	2%
Georgian Bluffs	97%	1%	0%	2%	97%	0%	0%	2%
Grey Highlands	92%	1%	1%	6%	93%	1%	1%	5%
Hanover	65%	2%	2%	31%	66%	3%	7%	25%
Meaford	84%	2%	2%	12%	84%	1%	5%	10%
Owen Sound	53%	5%	6%	36%	52%	4%	7%	37%
Southgate	93%	1%	0%	5%	94%	0%	0%	6%
West Grey	91%	1%	2%	9%	91%	1%	2%	6%
<b>Grey County</b>	<b>79%</b>	<b>2%</b>	<b>3%</b>	<b>16%</b>	<b>79%</b>	<b>2%</b>	<b>4%</b>	<b>15%</b>

Source: Statistics Canada Census data.

- As shown, the greatest proportions of higher density housing forms are in the municipalities of Owen Sound and Hanover, reflecting the more urban nature of these communities.
- Conversely, the communities of West Grey, Grey Highlands, Southgate, Chatsworth and Georgian Bluffs exhibit very high levels of single detached dwellings as a component of total housing stock.



#### **D. EMPLOYMENT DECLINED OVER RECENT CENSUS PERIOD AMIDST A SHIFTING ECONOMY**

While Grey continued to add residents and households over the two Census periods since 2001, employment in the County has been more variable<sup>1</sup>. As shown in Table 9, between 2001 and 2006, the County added roughly 3,400 jobs, growing in total Place of Work employment by 9%. Since then, the job base in Grey has declined, with the County losing 900 jobs between 2006 and 2011.

Similar declines in employment have been experienced in many Ontario communities, in particular those outside of major urban centres, owing to the recent recession and the general decline in the Province's manufacturing base. Since 2011, employment in Ontario has been growing. It is very likely that total employment in Grey has now exceeded the previous 2006 peak levels.

<b>Table 9</b> <b>Historical Total Place-of-Work Employment</b> <b>County of Grey, 2001 - 2011</b>			
<b>Year</b>	<b>Total Employment</b>	<b>Net Change</b>	<b>Compound Annual Growth Rate</b>
2001	39,500	--	--
2006	42,900	3,400	1.7%
2011	42,000	(900)	-0.4%

Source: Statistics Canada. Figures are rounded.

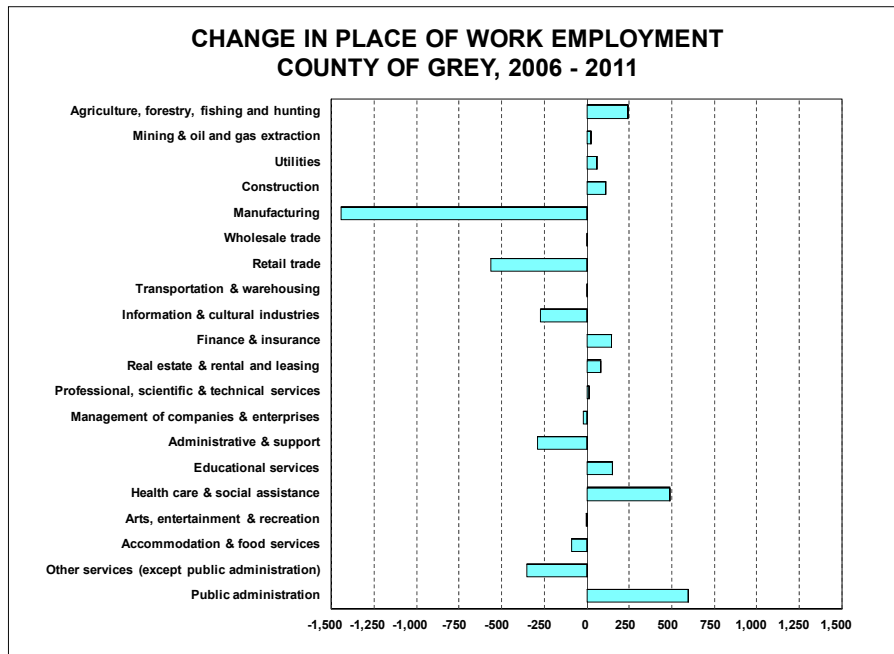
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<sup>1</sup> The data in this section are based on the National Household Survey. The National Household Survey (NHS) is the new voluntary-survey which replaced the long-form Census in 2011. The Census has historically provided an important source of labour force and employment information. Comparability issues have been identified between the historic Census data and the NHS. In particular, the NHS appears to have under-reported total employment in some areas relative to other sources, such as the Monthly Labour Force Survey. Notwithstanding concerns with the NHS and its comparability, the NHS remains the only source for economic and employment data gathered across a large sample of households that covers the entire Province and its municipalities in a standardized way. As a result it should still be used as the standard for 2011 base data, while understanding its potential pitfalls.



The recent decline in employment in Grey County included some growth in public administration, health care and social assistance, and rural-based employment, offset by more significant declines in manufacturing and retail trade, as shown in Exhibit 2.

**Exhibit 2: Change in Place of Work Employment, County of Grey, 2006-2011**



Source: Hemson Consulting Ltd. based on Statistics Canada 2011 National Household Survey & 2006 Census of Canada.

This change in the local economy is indicative of a shift occurring across many Ontario communities, away from manufacturing and traditional industries towards more services-based employment and public sector growth. At the same time, there are reasonable expectations for a recovery in the manufacturing economy albeit quite slowly.

Another aspect of the local economy and employment base in Grey that may not be fully captured by Statistics Canada are some on-farm businesses in the rural and agricultural area, largely related to the local Mennonite community. The County has begun to track applications for official plan and zoning by-law amendments to permit small scale on-farm rural businesses, which averaged 18 per year over the 2005 to 2015 time frame. The businesses, which are largely concentrated in the rural areas of Grey Highlands and Southgate, include a range of on-farm commercial activities, most notably for wood and metal works facilities and to a lesser extent for agricultural sales



and agri-tourism operations, kennels, landscaping and nursery operations and recreational facilities. The extent to which these businesses are contributing to local employment is not fully known but they are understood to be offsetting recent job losses in the County to some extent. It is anecdotally known that expansion of Mennonite operations in recent years have resulted in the hiring of area residents external to the Mennonite community, an emerging trend in Grey.

The overall change in measured Place of Work employment that occurred in the County over the 2001 to 2011 timeframe was again experienced unevenly among local municipalities in Grey. Table 10 provides the Place of Work employment by local municipality within Grey over the 2001 to 2011 period.

Table 10									
Historical Place of Work Employment by Local Municipality									
Grey County, 2001-2011									
Municipality	Place of Work Employment			2001-2006		2006-2011		Share of CountyTotal	
	2001	2006	2011	Net Change	Compound	Net Change	Compound	2001	2011
					Annual		Annual		
					Growth Rate		Growth Rate		
Blue Mountains	3,180	4,290	4,000	1,110	6.2%	(290)	-1.4%	8.1%	9.5%
Chatsworth	1,390	1,570	1,650	180	2.5%	80	1.0%	3.5%	3.9%
Georgian Bluffs	2,780	2,900	3,010	120	0.8%	110	0.7%	7.0%	7.2%
Grey Highlands	3,870	3,840	3,780	(30)	-0.2%	(60)	-0.3%	9.8%	9.0%
Hanover	5,280	5,610	6,000	330	1.2%	390	1.4%	13.4%	14.3%
Meaford	3,130	3,680	3,330	550	3.3%	(350)	-2.0%	7.9%	7.9%
Owen Sound	14,260	15,620	15,130	1,360	1.8%	(490)	-0.6%	36.1%	36.0%
Southgate	1,820	1,560	1,980	(260)	-3.0%	420	4.9%	4.6%	4.7%
West Grey	3,790	3,770	3,150	(20)	-0.1%	(620)	-3.5%	9.6%	7.5%
Grey County	39,500	42,900	42,000	3,400	1.7%	(900)	-0.4%	100%	100%

Source: Statistics Canada Census data and 2011 National Household Survey.

Figures are rounded and may not add.

Key observations include:

- Most local municipalities within Grey experienced employment growth between 2001 and 2006, followed by decline during the 2006 to 2011 period.
- Southgate was an exception to the County-wide trend, with local employment declining in the earlier part of the Census decade and growing by over 400 jobs between 2006 and 2011.
- The highest levels of overall employment growth over the ten-year period were in Owen Sound, Hanover and Blue Mountains, which are employment centres for many Grey residents.



- Hanover continued to experience employment growth over both Census periods between 2001 and 2011, as did Chatsworth and Georgian Bluffs although to more a modest extent.
- West Grey declined in its relative share of County-wide employment between 2001 and 2011 while Blue Mountains increased its share marginally over the same time frame.

While information about Place of Work employment tells us how many jobs are in the County, data on Resident Employed Labour Force tells us the number of residents of Grey County that are employed, irrespective of where the job is located.

As shown in Table 11, the number of employed residents in the County grew by roughly 2,300 between 2001 and 2006; followed by a decline of 1,300 during the 2006 to 2011 Census period. This was largely attached to factors such as the recent recession and the out-migration of younger working age residents. Given some comparability issues with the Census and NHS, the 2006 to 2011 change could be interpreted as relatively stable.

<b>Table 11</b> <b>Historical Resident Employed Labour Force</b> <b>County of Grey, 2001 - 2011</b>			
<b>Year</b>	<b>Total Employment</b>	<b>Net Change</b>	<b>Compound Annual Growth Rate</b>
2001	32,700	--	--
2006	35,000	2,300	1.4%
2011	33,700	(1,300)	-0.8%

Source: Statistics Canada.

Figures are rounded.

Again, the pattern of change was unevenly distributed throughout the County, as indicated in Table 12 which shows Resident Employed Labour Force by local municipality.



Table 12

Historical Resident Employed Labour Force by Local Municipality Grey County, 2001-2011									
Municipality	Resident Employed Labour Force			2001-2006		2006-2011		Share of County Total	
	2001	2006	2011	Net Change	Compound Annual Growth Rate	Net Change	Compound Annual Growth Rate	2001	2011
Blue Mountains	1,940	2,155	2,180	215	2.1%	25	0.2%	5.9%	6.5%
Chatsworth	2,110	2,185	2,280	75	0.7%	95	0.9%	6.5%	6.8%
Georgian Bluffs	4,085	4,760	4,320	675	3.1%	(440)	-1.9%	12.5%	12.8%
Grey Highlands	3,025	3,160	2,990	135	0.9%	(170)	-1.1%	9.3%	8.9%
Hanover	2,970	2,825	2,790	(145)	-1.0%	(35)	-0.2%	9.1%	8.3%
Meaford	3,735	4,085	4,105	350	1.8%	20	0.1%	11.4%	12.2%
Owen Sound	8,110	8,605	8,055	495	1.2%	(550)	-1.3%	24.8%	23.9%
Southgate	2,210	2,700	2,410	490	4.1%	(290)	-2.2%	6.8%	7.2%
West Grey	4,465	4,490	4,600	25	0.1%	110	0.5%	13.7%	13.6%
<b>Grey County</b>	<b>32,700</b>	<b>35,000</b>	<b>33,700</b>	<b>2,300</b>	<b>1.4%</b>	<b>(1,300)</b>	<b>-0.8%</b>	<b>100%</b>	<b>100%</b>

Source: Statistics Canada Census data and 2011 National Household Survey.

Figures are rounded and may not add.

#### Key observations include:

- Most of Grey's local municipalities experienced a slowing trend in employed residents in the 2006 to 2011 period, relative to the growth which occurred between 2001 and 2006.
- Chatsworth, Blue Mountains, West Grey and Meaford continued to grow in employed residents over both Census periods between 2001 and 2011, with West Grey and Chatsworth growing more so in the latter half of the Census decade.
- The communities of Owen Sound and Grey Highlands experienced a greater decline of employed residents in the 2006 to 2011 period than the level of growth observed in the earlier 2001 to 2006 period resulting in a net decline in employed residents in these communities over the ten year period.
- The overall distribution of employed residents throughout Grey County has not changed in any significant way since 2001.

A significant portion of Grey's employed residents, roughly 60%, are out-commuters. Table 13 indicates the share of employed residents commuting to employment outside of their own community.



<div>Table 13</div> <div>Out-Commuting by Local Municipality</div> <div>Grey County, 2011</div>			
Municipality	Resident Employed Labour Force	Out-Commuting	Share of Employed Residents
Blue Mountains	2,180	1,405	64%
Chatsworth	2,280	1,915	84%
Georgian Bluffs	4,320	3,735	86%
Grey Highlands	2,990	1,990	67%
Hanover	2,790	1,125	40%
Meaford	4,105	2,845	69%
Owen Sound	8,055	1,720	21%
Southgate	2,410	1,985	82%
West Grey	4,600	3,530	77%
<b>Grey County</b>	<b>33,700</b>	<b>20,200</b>	<b>60%</b>

Note: Out commuting reflects those working outside of own municipality.

Note: Grey County figures represent those working outside of the County.

- With the exceptions of Owen Sound and Hanover, Grey's local municipalities exhibit very high levels of net out-commuting. Over 80% of employed residents in Chatsworth, Georgian Bluffs and Southgate do not work within their community. West Grey similarly has a significant net out-commuting. It is noted that the commuting figures are derived from the National Household Survey which may exclude Mennonite populations within some Grey municipalities, notably Chatsworth, Grey Highlands and Southgate.
- For the most part, Grey residents are commuting to job opportunities elsewhere within Grey County, the largest concentration being in Owen Sound. A significant number of the County's residents also commute beyond Grey to the Counties of Simcoe and Bruce.

## E. COMPARISON TO 2008 GMS FORECASTS

It is important to understand how recent growth in the County compares with the forecasts which formed the basis of the County's 2008 GMS. Those projections were prepared on the basis of 2006 Census data and forecast growth in population, housing and employment from a 2006 base to a 2031 horizon. A subsequent amendment to the *Grey County Official Plan* included adoption of the GMS forecasts to a 2026 planning horizon.



A review of the 2008 GMS indicates that the original forecasts over-estimated the levels of population and housing growth that would occur in Grey over the 2006 to 2011 period and under-estimated the County's 2011 employment, as shown in Table 14 below.

<div>Table 14</div> <div>Comparison - 2008 Grey County GMS 2011 Forecasts &amp; 2011 Census Results</div>			
	GMS 2011 Forecast*	2011 Census Results**	Difference
Total Population***	102,200	94,800	7,400
Households	40,400	38,045	2,355
Employment	41,000	42,030	-1,030

\* 2011 forecast totals prepared by CS4E for 2008 Growth Management Strategy.

\*\* Actual 2011 totals from Statistics Canada Census and National Household Survey.

\*\*\*Total Population Including Census Net Undercoverage

Given the marked slowdown in population and housing growth which occurred in Grey since 2006 compared with the level of growth experienced between 2001 and 2006, it is not unreasonable that the original GMS forecasts over-estimated the 2011 figures. A shift in the pattern of growth is in part occurring as a result of the aging of the population.

The divergence between the 2008 GMS forecasts of 2011 population, housing and employment in the County and the actual change that occurred between 2006 and 2011 in Grey highlights the importance of regular forecast reviews. The current GMS update provides a key opportunity to re-examine growth and change in Grey and to ensure the County is planning on the basis of a realistic and appropriate growth outlook moving forward.

The next section provides an overview of the forecast method and assumptions and presents the County-wide results.



### **III COUNTY-WIDE FORECASTS INDICATE MODERATE GROWTH TO 2036**

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This section provides an overview of the forecast method and assumptions underlying the County-wide forecasts. Three forecast scenarios were prepared based on varying assumptions about future levels of in-migration. A low, a reference and a high scenario provide a range on the County's future growth outlook. The reference scenario represents the most likely outcome for Grey and was endorsed by County staff following consultation with local municipal planning staff.

#### **A. FORECAST METHOD & ASSUMPTIONS**

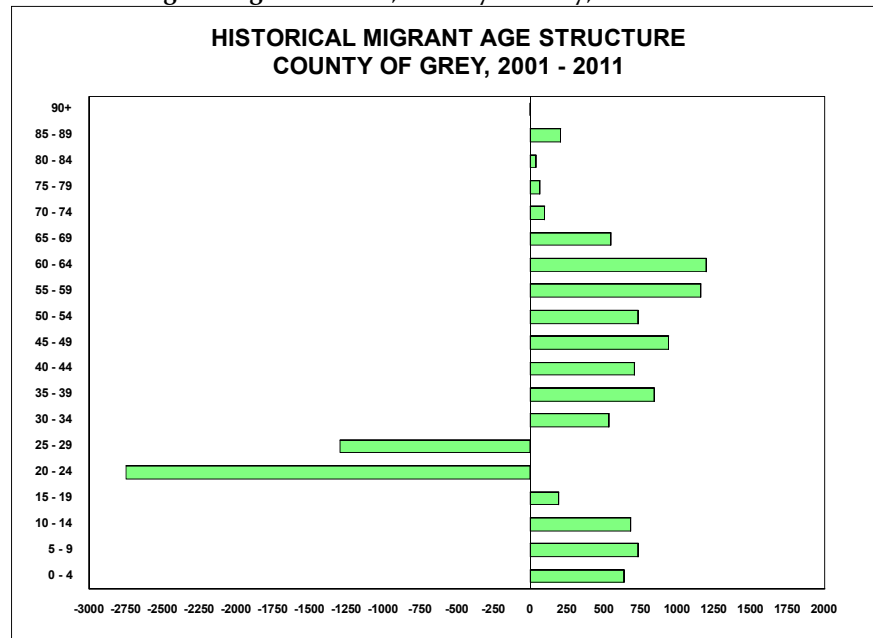
The forecasts of population, households and employment at the County-level are based upon the standard cohort-survival forecast model. The approach begins by forecasting population and employment based on set of key assumptions and national and provincial economic and demographic trends.

##### **1. Migration is Key Forecast Assumption**

Migration will be an important determinant of future growth in Grey County. Over the past 20 years, migration has come to represent the largest share of population growth throughout Ontario. Population growth is the result of three components: births, deaths and migrants. In places where levels of natural increase continue to decline (and in many areas is now negative due to the decrease in fertility rates and the aging of the population), migration drives population growth. Given that the "baby boom" population is now beyond its child bearing years (even the youngest boomers are just turning 50), there will be even fewer births going forward.

Without in-migration, population in the County will decline. To even maintain the current population will require in-migration. This is an important consideration as most communities in Ontario outside of the Toronto and Ottawa areas, including Grey, are experiencing the out-migration of young adults, as illustrated through the recent age-structure of the County's migrants, shown in Exhibit 3 on the following page.



**Exhibit 3: Historical Migrant Age Structure, County of Grey, 2001-2011**

Source: Hemson Consulting Ltd. based on Statistics Canada 2001, 2006 & 2011 Census.

The forecast method is described below and illustrated in Exhibit 4.

## 2. Core Parameters

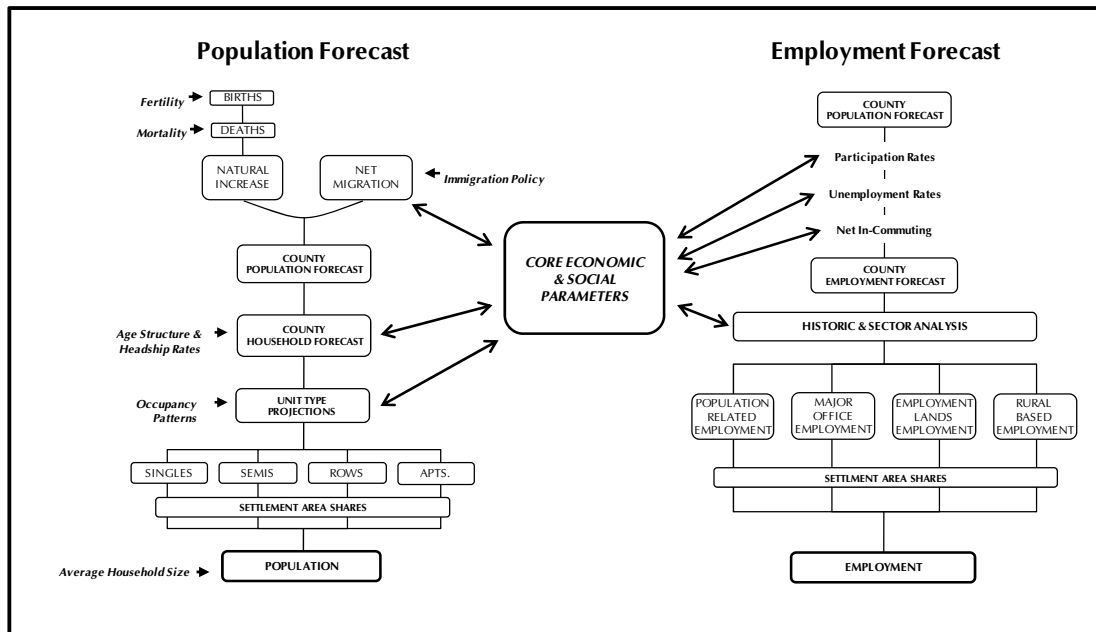
The forecasts are prepared by applying a set of principal assumptions within the forecast model related to Ontario's economic future and its social context. This set of core economic and social parameters include: the broader outlook and composition of the Ontario economy; migration and settlement patterns,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

The current broad economic and demographic trends are expected to continue over the forecast horizon. That is, it is anticipated that the Ontario economy will continue to grow at a moderate pace over the coming decades, consistent with average rates of growth over recent decades. This growth will occur within the context of a continued shift towards a service sector based economy with a proportionately reduced emphasis on manufacturing. With an aging population and fertility rates below replacement levels, immigration will be the key contributor to population growth in Canada, but with much of that growth occurring in the major urban centres. Growth in Grey will continue to be largely dependant on intra-provincial migration based on the attraction



of natural amenities and rural living. Like most of Ontario outside the major centres, Grey will continue to have out migration of young adults seeking education and economic opportunities. In Grey's case the young adult out migration is more than compensated for numerically by in-migration of families with children and early retirees. The effect of these patterns is that Grey will experience a more rapid population aging than larger cities which has consequential effects on housing demand and employment in Grey.

**Exhibit 4: Forecast Method Diagram**



### 3. Population

The population forecast for the County is based on information from a wide range of sources including the 2011 Census and Statistics Canada Annual Demographic Statistics. The forecast accounts for: births by age of mother, deaths by age and sex, and migration by its seven components, each also by age and sex, at both Provincial and sub-provincial geographies. The model operates by taking a five-year age group (e.g. 20 to 24 in 2011), aging them by five years (they become 25 to 29 in 2016), deducting deaths in that age group (the “natural increase”), and finally, adding net migration for that age group. Births during the five-year period produced by this age group are then added to the 0 to 4 year age group.

- Age-specific fertility and mortality rates for Grey are calculated based upon the most recent data available. In general, a slight increase in total fertility rates is expected along with continued decline in mortality rates. These patterns are



consistent with those used by the Ministry of Finance in its demographic forecasts. These rates are applied to the population age structure to determine growth through natural increase.

- Migration by age and sex is then added to determine total population. Assumptions about future levels of migration are an important determinant of the forecast. International and inter-provincial migration increments have little net effect on the County. Most of the migration movement is within Ontario. Mainly, the out-migration of young adults in their 20's balanced by in-migration in most other age groups. Grey is anticipated to experience net in-migration to the forecast horizon.

#### **4. Households**

The household forecast is based upon age-specific household formation data for Grey from the 2011 National Household Survey. This is the share of population within an age group that typically maintains or is the head of a household, otherwise referred to as the “headship rate”. The 2011 National Household Survey data also provides the unit-type preference by the household heads within each age group. Generally, apartments are preferred by younger age groups but this preference declines rapidly and shifts to ground-related units during the years when most family households are formed. A preference for apartment living returns among the elderly and typically only when people can no longer maintain their homes due to declining health or the death of a spouse. The longer we live and the healthier we remain in old age, the longer we remain in ground-related housing. Age-specific household formation rates and housing unit type preferences by age for 2011 are held constant over the course of the forecast.

#### **5. Employment**

The employment forecast is driven by the economy in Grey but is calculated based on the population forecast, prepared by applying age-specific labour force participation rates to the population forecast and adjusting for unemployment and commuting patterns.

The County's employment forecast has been prepared based on 2011 National Household Survey employment data. The ‘reference’ scenario is based on the following assumptions:

- 2011 commuting patterns shift somewhat over the forecast horizon with less out-commuting, however it is anticipated that Grey will continue to experience out-commuting to job opportunities in the broader economic region, largely to Simcoe County, and to a lesser extent, Bruce County;



- 2011 age- and sex-specific labour force participation rates increase slightly in the short term with economic recovery and then remain stable over the remaining forecast period;
- the 2011 unemployment rate of 7.4% declines gradually to approximately 5% over the forecast horizon; and
- the 2011 activity rate (the ratio of employment to population within the County) of 45% remains relatively stable, declining marginally to 43% over the period to 2031. The activity rate is the ratio of employment to population within Grey.

## **6. Low and High Growth Forecast Scenarios Have Been Prepared**

In addition to the reference forecast scenario, low and high range forecasts have been prepared in order to provide a broad picture of the future growth outlook. The purpose of the low and high range scenarios is to illustrate growth prospects under a set of deliberately aggressive and conservative assumptions about the future economy and levels of net in-migration to the County.

### **B. COUNTY-WIDE REFERENCE FORECAST RESULTS**

The County-wide forecast results for housing, population and employment are provided in the tables below. Results are shown for the low, reference and high growth scenarios. The reference scenario represents what is in our view, the most likely outcome for Grey County based on our current understanding of economic and demographic trends affecting the pattern and pace of growth and development in the County. The recommended reference scenario forms the basis for allocations of growth to municipalities within Grey. The results are shown at five-year intervals corresponding with the Census, from a 2011 to 2041 horizon, however the 2016 to 2036 timeframe is emphasized as this represents a twenty year planning horizon for updating the *Grey County Official Plan*.

Tables 15 and 16 indicate the forecast results for Grey County's Census and Total Population including Census Net Undercoverage. As shown, the County is anticipated to add roughly 10,700 new residents between 2016 and 2036, growing by 11% under the reference forecast scenario over the planning horizon.



Table 15 Forecast Census Population County of Grey, 2011-2041						
Year	Forecast Scenario			Forecast Scenario Growth		
	Low	Reference	High	Low	Reference	High
2011	92,600	92,600	92,600			
<b>2016</b>	<b>93,400</b>	<b>94,700</b>	<b>95,500</b>	<b>800</b>	<b>2,100</b>	<b>2,900</b>
2021	94,600	97,200	98,800	1,200	2,500	3,300
2026	96,300	100,100	103,500	1,700	2,900	4,700
2031	97,800	103,000	108,800	1,500	2,900	5,300
<b>2036</b>	<b>98,600</b>	<b>105,400</b>	<b>113,400</b>	<b>800</b>	<b>2,400</b>	<b>4,600</b>
2041	98,800	107,100	117,500	200	1,700	4,100
<b>2016-2036</b>				<b>5,200</b>	<b>10,700</b>	<b>17,900</b>

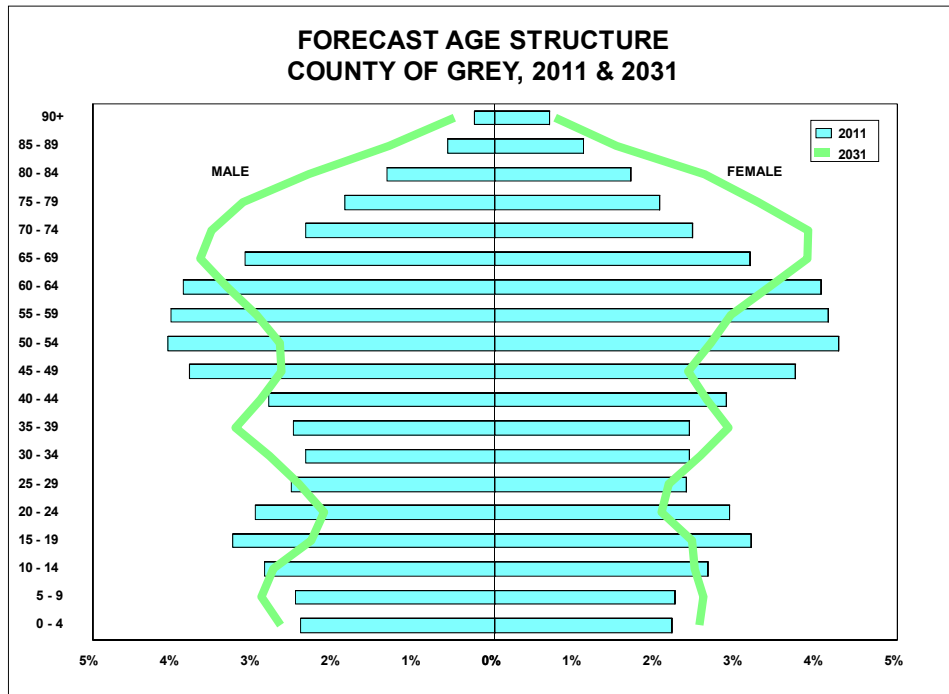
Figures are rounded.

Table 16 Forecast Total Population (Including Census Net Undercoverage) County of Grey, 2011-2041						
Year	Forecast Scenario			Forecast Scenario Growth		
	Low	Reference	High	Low	Reference	High
2011	94,800	94,800	94,800			
<b>2016</b>	<b>95,600</b>	<b>96,900</b>	<b>97,800</b>	<b>800</b>	<b>2,100</b>	<b>3,000</b>
2021	96,900	99,500	101,200	1,300	2,600	3,400
2026	98,600	102,500	105,900	1,700	3,000	4,700
2031	100,100	105,400	111,400	1,500	2,900	5,500
<b>2036</b>	<b>100,900</b>	<b>107,900</b>	<b>116,200</b>	<b>800</b>	<b>2,500</b>	<b>4,800</b>
2041	101,100	109,700	120,400	200	1,800	4,200
<b>2016-2036</b>				<b>5,300</b>	<b>11,000</b>	<b>18,400</b>

Figures are rounded.

The aging demographic trend is anticipated to continue over the forecast horizon which will result in declining average household size. The County's forecast Age Structure is illustrated in Exhibit 5.



**Exhibit 5: Forecast Age Structure, County of Grey, 2011 & 2031**

Housing growth will continue to outpace growth in population over the forecast horizon, owing to the decline in average household size, again, a result of the aging population. As shown in Table 17, under the reference forecast scenario, Grey County is anticipated to add approximately 4,900 occupied housing units over the 2011 to 2031, representing growth of 12.5% over the planning horizon.



Table 17 Forecast Total Occupied Housing Units County of Grey, 2011-2041						
Year	Forecast Scenario			Forecast Scenario Growth		
	Low	Reference	High	Low	Reference	High
2011	38,000	38,000	38,000			
<b>2016</b>	<b>39,100</b>	<b>39,500</b>	<b>39,700</b>	<b>1,100</b>	<b>1,500</b>	<b>1,700</b>
2021	40,300	41,000	41,500	1,200	1,500	1,800
2026	41,600	42,500	43,500	1,300	1,500	2,000
2031	42,200	43,500	45,200	600	1,000	1,700
<b>2036</b>	<b>42,700</b>	<b>44,400</b>	<b>46,700</b>	<b>500</b>	<b>900</b>	<b>1,500</b>
2041	43,000	45,100	48,200	300	700	1,500
<b>2016-2036</b>				<b>3,600</b>	<b>4,900</b>	<b>7,000</b>

Figures are rounded.

Employment is anticipated to remain relatively stable in comparison to growth in housing and population, with total Place of Work employment in Grey growing by just over 1,400 jobs, or 3% over the 2016 to 2036 period under the reference scenario.

Table 18 Forecast Total Place of Work Employment County of Grey, 2011-2041						
Year	Forecast Scenario			Forecast Scenario Growth		
	Low	Reference	High	Low	Reference	High
2011	42,000	42,000	42,000			
<b>2016</b>	<b>42,900</b>	<b>43,500</b>	<b>43,900</b>	<b>900</b>	<b>1,500</b>	<b>1,900</b>
2021	42,600	43,600	44,200	-300	100	300
2026	42,100	43,700	44,800	-500	100	600
2031	41,800	43,800	45,900	-300	100	1,100
<b>2036</b>	<b>42,200</b>	<b>44,900</b>	<b>48,000</b>	<b>400</b>	<b>1,100</b>	<b>2,100</b>
2041	43,200	46,700	50,900	1,000	1,800	2,900
<b>2016-2036</b>				<b>(700)</b>	<b>1,400</b>	<b>4,100</b>

Figures are rounded.

Consistent with our recommendation about the most likely outcome and appropriate basis for growth planning in Grey, the County has endorsed the reference forecast scenario. This forms the basis of the local allocations of growth to municipalities within Grey and subsequent update to the *Grey County Official Plan*.



## **IV LOCAL ALLOCATION OF FORECAST GROWTH BASED ON POLICY, MARKET DEMAND AND SUPPLY**

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The County-wide reference growth forecast is allocated to local municipalities in Grey taking into consideration a range of factors including planning policy direction, patterns of historic growth and recent development trends, land supply and servicing capacities and consultation with local municipal and industry stakeholders.

### **A. PPS (2014) SETS THE FRAMEWORK FOR GROWTH ALLOCATIONS AND PLANNING AT THE LOCAL LEVEL**

The update to the GMS forecasts and local distribution of growth is being undertaken within the context of the Provincial Policy Statement (PPS). The PPS articulates Provincial direction for land use planning and appropriately managing growth and urban development in Ontario while protecting and enhancing natural heritage features. An updated PPS came into effect on April 30<sup>th</sup>, 2014 including a number of strengthened directions and considerations in planning for anticipated growth and development in Grey.

- The new PPS (2014) reflects a revised provincial approach to land use planning for rural communities. It recognizes the diversity of rural communities in Ontario.
- Rural communities, according to the Province's *Introduction to the PPS 2014: Rural Ontario*, differ in terms of economy, geography, population density, culture and society. Each of these characteristics differs within municipalities in the County, given the large scale of the planning area. Grey has its population spread out over a large area, which can present challenges for all kinds of servicing. Efficient use of infrastructure is important for future planning.
- The PPS acknowledges the “lifestyle advantages” of some rural areas, especially those with access to cultural heritage and natural amenity areas; a key consideration for many of Grey's local municipalities.
- New housing and other development is to be focused on existing settlement areas. Limited resource-based recreational uses and residential development



may be permitted but dispersed development, e.g. estate residential, is not encouraged. It is recognized that the costs of dispersed development are very high and although rural communities may wish to welcome any and all development, it is often not in the long-term fiscal interest of the municipality or the Province.

- Within both urban and rural settlement areas, intensification (1.1.3) is intended to accommodate a mix and range of housing types.
- Settlement area expansions are only to be considered through comprehensive reviews. The preparation of the updated GMS gives local municipalities of Grey an additional opportunity to consider their future land needs within the context of the updated County-wide planning framework. The PPS indicates that it is important for municipalities to consider the need for expansion, capacity of planned or available infrastructure, alternative directions for growth that avoid primary agricultural areas and to consider redevelopment and intensification before greenfield development.

In the context of the PPS, the forecasts prepared at the County-level and distributed to Grey's local municipalities in this analysis will provide a basis for planning under an updated *Grey County Official Plan*.

The nine local municipalities of Grey County include a range of primary, secondary and tertiary settlement areas at the local level as well as significant rural and agricultural lands. Each municipality is responsible for planning for growth and change at the local municipal level, including directing forecast growth to their designated planning areas through their own official plans.

- The distribution of growth within the County must be consistent with direction in the PPS (2014). As such, most growth should be directed to settlement areas, firstly to primary settlement areas which are those with the broadest range of land uses and full municipal water and wastewater services, and next to secondary and tertiary settlement areas, which are more residentially oriented and have partial or private services.
- For some Grey municipalities, limits will be placed on growth by the rural and privately serviced nature of the community, while most future development will be directed through to serviced settlement areas.



The allocation of forecast growth to local municipalities within Grey is determined by applying shares of County-wide household growth to each local municipality. Consideration is given to Provincial, County and local planning policy, historic growth, anticipated market shifts and the capacity to accommodate growth from land supply and servicing perspectives. The forecast population is then determined by applying average household sizes to the household forecast.

Through the growth allocations, the County has an opportunity to balance local aspirations, priorities and capacities for growth with policy direction while recognizing that a range of policy, demographic and economic factors will determine the growth that will ultimately occur within Grey's local municipalities. The distribution of forecast growth through the County official plan does not limit the level of growth which may occur in a community but provides a reasonable basis for planning purposes. Owing to the inherent uncertainty in forecasting, the County-wide outlook and local distribution of growth should be reviewed at regular intervals and updated as appropriate to reflect the most current data available.

## **1. Recent Residential Development**

Table 19 indicates local residential building permit activity within Grey's local municipalities over the 2006 to 2011 period and more recently, for 2011 to 2014. The building permit information for the most part reinforces the pattern of growth observed in the Census. Shares of growth by permits need to be compared cautiously to the previous tables as many of the permit units are seasonal and recreational.



<b>Table 19</b> <b>Residential Building Permits by Local Municipality - All Unit Types</b> <b>Grey County, 2006-2014</b>				
<b>Municipality</b>	<b>Total Permits</b>		<b>Share of County-wide</b>	
	<b>2006-2010</b>	<b>2011-2014</b>	<b>2006-2011</b>	<b>2012-2014</b>
Blue Mountains	779	251	28.6%	21.8%
Chatsworth	179	65	6.6%	5.6%
Georgian Bluffs	218	178	8.0%	15.4%
Grey Highlands	214	125	7.9%	10.8%
Hanover	230	64	8.5%	5.6%
Meaford	308	90	11.3%	7.8%
Owen Sound	361	122	13.3%	10.6%
Southgate	194	87	7.1%	7.5%
West Grey	238	171	8.7%	14.8%
<b>Grey County</b>	<b>2,721</b>	<b>1,153</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Statistics Canada building permits.

The greatest concentration of residential development over the past decade has been in the Town of The Blue Mountains, where well over 20% of the County's residential unit development has occurred. A significant portion of this is attributed to seasonal recreational units. The City of Owen Sound, Township of Georgian Bluffs, Municipality of Grey Highlands and the Municipality of West Grey have also experienced higher shares of County-wide residential development in recent years, although annual residential permit activity has slowed since 2012.

The Township of Georgian Bluffs and the municipality of Grey Highlands both increased in relative shares of County-wide residential development activity in more recent years, which may also be attributed in part to the attraction of these communities for recreational dwellings. At the same time, the proportions of County-wide residential development within the Municipality of Meaford, the Township of Chatsworth and Town of Hanover declined marginally in the recent data.

## **B. UPDATED LAND SUPPLY INVENTORY AND CAPACITY ANALYSIS**

An updated land supply inventory has been prepared based on a County, local municipal and Municipal Property Assessment Corporation (MPAC) data. Two inventories – one derived from County data and one based on local municipal and MPAC data – were examined in order to understand where the County and its local municipalities sit in terms of available land supply to accommodate growth.



The inventories are based on data provided by the County and local municipalities within Grey and updated in an iterative process working in consultation with County and local municipal planning staff.

For the local municipal inventory, the vacant designated supply was initially determined by layering vacant parcel data from MPAC over the municipal zoning and /or official plan designations, as provided. It is noted that:

- Some municipalities provided zoning information, others official plan designations and others did not provide GIS data. The inventory is based on the data provided and any additional input received from municipal staff, vetted and refined through consultation.
- In some cases, the GIS data provided may not reflect the most current situation on the ground with respect to designations or land use. Where provided, additional information on vacant supply supplements the local GIS data.
- Some differences in figures between the County and local municipal sources were observed and likely derive from the timing of data and / or varied classification of parcels. The results of both inventories are shown however the land supply capacity analysis employs the local municipal data which has been reviewed by local municipal planning staff.

Detailed land supply tables and mapping are provided as Appendix to this report.

The County land supply inventory is broadly categorized under the following *Grey County Official Plan* designations:

- Primary, Secondary and Tertiary Settlement Areas – the focus of growth and development differentiated by levels of servicing and urban function;
- Inland Lakes and Shoreline, Recreational Resort, Escarpment Residential – some development is permitted largely oriented to seasonal recreational residential and commercial uses;
- Rural Area – primarily agricultural and forestry related uses as well as low density non-farm residential, garden suites, small scale commercial and industrial uses, institutional and resource based recreational uses and sand/gravel operations (where identified within Aggregate Resource Areas, Mineral Resource Extraction, wayside pits and quarries); and



- Agricultural Area – primarily agricultural and forestry related uses with some mineral resource extraction and aggregate uses (where identified within Aggregate Resource Areas, Mineral Resource Extraction, wayside pits and quarries) and farm residential. Agricultural includes Agriculture, Special Agriculture and Niagara Escarpment lands as designated in the County official plan.

The results of the County land supply inventory are shown in Tables 20, 21 and 22.

Table 20 Vacant Land Supply - All Residential Municipal Totals based on County Wide Official Plan Designations Grey County, 2012									
Municipality	Grey County Official Plan Designations (gross ha)								
	Primary	Secondary	Tertiary	Other	Draft Approved Plans	Sub-total (Non-Rural)	Rural	Agricultural	Total (All)
Blue Mountains	72.5	0.0	2.0	603.1	(19.8)	657.8	751.7	2,921.7	4,331.2
Chatsworth	0.0	84.1	1.7	2.2	(10.6)	77.4	2,756.1	432.4	3,266.0
Georgian Bluffs	16.4	55.4	39.1	410.7	(44.9)	476.6	2,367.8	2,037.2	4,881.7
Grey Highlands	15.6	136.9	16.4	109.0	(17.7)	260.1	1,667.5	2,452.3	4,380.0
Hanover	111.7	0.0	0.0	0.0	(6.3)	105.4	0.0	0.0	105.4
Meaford	68.8	0.0	13.4	173.0	(7.4)	247.8	1,903.3	1,526.7	3,677.9
Owen Sound	211.6	0.0	0.0	0.0	(11.4)	200.2	0.0	1.3	201.5
Southgate	81.2	3.2	20.6	6.3	(16.1)	95.3	840.7	347.7	1,283.7
West Grey	68.0	12.6	12.9	0.8	(0.7)	93.7	3,577.6	200.8	3,872.0
<b>Grey County</b>	<b>645.8</b>	<b>292.1</b>	<b>106.0</b>	<b>1,305.2</b>	<b>(134.9)</b>	<b>2,214.4</b>	<b>13,864.8</b>	<b>9,920.2</b>	<b>25,999.4</b>

Table 21 Vacant Land Supply - Commercial Municipal Totals based on County Wide Official Plan Designations Grey County, 2012									
Municipality	Grey County Official Plan Designations (gross ha)								
	Primary	Secondary	Tertiary	Other	Draft Approved Plans	Sub-total (Non-Rural)	Rural	Agricultural	Total (All)
Blue Mountains	4.3	0.0	0.0	0.7	-	5.0	0.0	0.0	5.0
Chatsworth	0.0	0.2	0.0	0.0	-	0.2	0.0	0.0	0.2
Georgian Bluffs	0.0	0.6	4.7	0.0	-	5.3	14.4	0.4	20.2
Grey Highlands	0.6	1.8	0.0	102.2	-	104.5	1.9	0.0	106.4
Hanover	18.7	0.0	0.0	0.0	-	18.7	0.0	0.0	18.7
Meaford	2.4	0.0	0.1	0.0	-	2.5	0.0	0.4	2.9
Owen Sound	36.0	0.0	0.0	0.0	-	36.0	0.0	0.0	36.0
Southgate	7.0	0.1	0.0	0.0	-	7.1	5.9	0.0	13.0
West Grey	0.8	0.2	0.0	0.0	-	1.0	0.1	0.0	1.1
<b>Grey County</b>	<b>69.9</b>	<b>2.8</b>	<b>4.8</b>	<b>102.8</b>	<b>-</b>	<b>180.4</b>	<b>22.4</b>	<b>0.8</b>	<b>203.6</b>

Table 22 Vacant Land Supply - Industrial Municipal Totals based on County Wide Official Plan Designations Grey County, 2012									
Municipality	Grey County Official Plan Designations (gross ha)								
	Primary	Secondary	Tertiary	Other	Draft Approved Plans	Sub-total (Non-Rural)	Rural	Agricultural	Total (All)
Blue Mountains	28.9	0.0	0.0	0.0	-	28.9	0.0	0.0	28.9
Chatsworth	0.0	0.0	0.0	0.0	-	0.0	0.0	0.0	0.0
Georgian Bluffs	0.0	0.0	0.0	0.0	-	0.0	0.0	0.0	0.0
Grey Highlands	17.2	0.0	0.0	0.0	-	17.2	9.2	30.6	56.9
Hanover	51.0	0.0	0.0	0.0	-	51.0	0.0	0.0	51.0
Meaford	20.1	0.0	0.0	0.0	-	20.1	4.6	5.6	30.3
Owen Sound	125.2	0.0	0.0	0.0	-	125.2	0.0	0.0	125.2
Southgate	16.3	0.0	0.0	0.0	-	16.3	5.8	0.0	22.2
West Grey	1.3	0.0	0.0	0.0	-	1.3	8.6	0.0	9.9
<b>Grey County</b>	<b>260.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>-</b>	<b>260.0</b>	<b>28.2</b>	<b>36.2</b>	<b>324.4</b>

Source: Hemson Consulting Ltd. based on MPAC data and information provided by Grey County.

Note: Agricultural includes Official Plan designations: Agricultural, Special Agricultural and Niagara Escarpment

Note: Other includes Official Plan designations: Inland Lakes & Shoreline, Recreational Resort & Escarpment Recreation.



- As shown, the County has over 1,000 ha of vacant residentially-designated lands within Grey's designated settlements areas, the bulk of which is contained within Primary settlements, which are those with a full range of urban services and functions.
- There is also a fairly substantial supply of vacant lands under Inland Lakes & Shorelines, Recreational Resort and Escarpment Recreation designations, notably within the Town of The Blue Mountains and the Township of Georgian Bluffs. It is anticipated that these lands will accommodate growth in residential and commercial uses, particularly related to seasonal units and recreational uses.
- Designated lands currently in draft approved plans of subdivision are removed from the overall inventory in order to evaluate future growth potential on unplanned vacant lands. It is noted that for some municipalities, there is a long-standing supply of lands with draft approved status that have been slow to develop and may not come to market in the foreseeable future. The status of these plans may be re-assessed by the County as appropriate in order to ensure the adequacy of servicing allocations and capacity.
- A good amount of vacant industrial lands are also identified within Primary Settlement Areas and to a lesser extent in the Rural Area.
- A significant amount of rural and agricultural area lands are also noted which may accommodate some limited growth in residential and employment uses but, consistent with Provincial policy, these are not areas to be considered for directing any significant amount of future growth. It is noted that there has been some growth in small scale commercial industrial development in the rural and agricultural areas in recent years, and that provisions for on-farm diversified uses may enable some further employment growth in these areas going forward. However, this is not anticipated to be a significant growth area for the County, nor would Provincial policy encourage it.

A local municipal land supply inventory was prepared and refined based on consultation with local municipal planning staff. This is the land supply used as basis for the growth capacity analysis. The supply comprises vacant designated residential, commercial and industrial lands, excluding lands under approved draft plans, as identified through local municipal official plan and zoning by-law data as provided by Grey municipalities, and cross-referenced with information from MPAC.



Focus in this exercise is on urban designations as the locations where most future growth and development will be directed, consistent with the PPS. It is acknowledged that for many municipalities within Grey County, there is significant vacant land and registered and draft approved plans in the rural area, however for the purposes of considering growth potential in this exercise, settlement areas are the focus. The vacant land inventory that forms the basis of the analysis is shown in Table 23.

Table 23 Vacant Land Supply Inventory by Local Municipality Grey County, 2014				
Municipality	Local Designations (gross ha)			
	Residential	Commercial	Industrial	Total
Blue Mountains	244.3	5.6	28.9	278.8
Chatsworth	123.7	0.2	7.4	131.3
Georgian Bluffs	389.5	9.8	43.9	443.1
Grey Highlands	369.3	105.9	17.2	492.4
Hanover	102.5	19.4	56.3	178.3
Meaford	210.2	3.2	26.8	240.2
Owen Sound	170.2	29.7	136.6	336.5
Southgate	64.4	1.6	45.3	111.3
West Grey	79.9	1.1	9.3	90.3
<b>Grey County</b>	<b>1,754.0</b>	<b>176.4</b>	<b>371.8</b>	<b>2,302.2</b>

Source: Hemson Consulting Ltd. based on Municipal data provided.

Note: Draft Approved Plans have been netted out of the above totals.

Note: Residential supply for Owen Sound includes the area designated in Sydenham Heights Secondary Plan (Phase 1 & 2).

## 1. Residential Land Capacity Analysis

A density range was applied to the vacant developable residential land inventory, based on direction contained within section 2.6 of the *Grey County Official Plan* and considering local servicing characteristics, as a basis for determining the potential unit capacity within each local municipality. A net to gross adjustment was made, reducing the gross developable land supply by a factor of 35%, an industry standard, to provide for subdivision and infrastructure needs.

For the City of Owen Sound, the figures have been adjusted to account for the approved Sydenham Heights Secondary Plan Phase I and II for which capacity estimates were recently prepared by the City reflected in a September 2014 update to



the *City of Owen Sound Official Plan*. The mapping and figures have been manually noted to reflect this however GIS data was not provided.

The estimated capacity of vacant designated lands to accommodate residential growth by local municipality in Grey is shown in Table 24.

Table 24 Vacant Residential Land Supply Capacity by Local Municipality Grey County, 2014							
Municipality	Vacant Residential		Unit Capacity @ Density Range				
	Gross ha	Net ha	3	6	15	20	25
Blue Mountains	244.3	158.8	476	953	2,382	3,176	n/a
Chatsworth	123.7	80.4	241	n/a	n/a	n/a	n/a
Georgian Bluffs	389.5	253.2	759	1,519	3,797	5,063	n/a
Grey Highlands	369.3	240.1	720	1,440	3,601	4,802	n/a
Hanover	102.5	66.7	n/a	n/a	n/a	n/a	1,666
Meaford	210.2	136.6	410	820	2,049	2,732	n/a
Owen Sound	170.2	110.6	n/a	n/a	n/a	n/a	2,765
Southgate	64.4	41.9	126	251	628	837	n/a
West Grey	79.9	51.9	156	312	779	1,039	n/a
<b>Grey County</b>	<b>1,754.0</b>	<b>1,140.1</b>	<b>2,888</b>	<b>5,294</b>	<b>13,236</b>	<b>17,648</b>	<b>4,432</b>

Source: Hemson Consulting Ltd. based on Municipal data provided.

Based on the net vacant residential supply and the density assumptions applied, there appears to be fairly significant unit capacity County-wide and within each of Grey's local municipalities.

There may also be additional residential development capacity for some municipalities in Grey that is not captured here – for example in mixed use designated areas where the ultimate balance of residential, commercial and industrial uses is yet to be determined. Further, the capacity analysis only considers vacant designated residential lands – additional unit capacity through intensification within existing built up areas would further add to the County's overall unit potential.

Conversely, the extent to which servicing capacity may place limits on growth for some Grey communities could reduce the ultimate unit potential.

The capacity estimate gives an indication of the range on unit growth that could potential be accommodated within the existing residentially designated greenfield supply. Given the significant capacity identified, it is likely that Grey's local municipalities will have more than sufficient designated lands to accommodate residential growth potential for the twenty year planning horizon. At such time that the County undertakes its next GMS and official plan update, the forecasts and local growth allocations will be reviewed and updated as appropriate to reflect any change in the pattern or pace of growth within Grey based on the most current available data.



## 2. Employment Land Capacity Analysis

An analysis was also undertaken of the amount of Grey's vacant designated industrial lands in order to assess the capacity to accommodate traditional employment within the County. A net to gross adjustment of 80% for industrial land was applied to the gross developable supply as well as a further adjustment reducing the net supply by an industry standard 15% for long-term vacancy and underutilization. A density range of 15, 20 and 25 jobs per net ha was applied to the adjusted net supply. The results are shown in Table 25.

Vacant Industrial Land Supply Capacity by Local Municipality Grey County, 2014							Table 25
Municipality	Vacant Industrial Land Supply (ha)			Employment Capacity at a range of densities (employees / net ha)			
	Gross	Net*	Adjusted**	15	20	25	
Blue Mountains	28.9	23.1	19.6	295	393	491	
Chatsworth	7.4	5.9	5.0	75	100	125	
Georgian Bluffs	43.9	35.1	29.8	447	597	746	
Grey Highlands	17.2	13.7	11.7	175	234	292	
Hanover	56.3	45.0	38.3	574	766	957	
Meaford	26.8	21.5	18.2	274	365	456	
Owen Sound	136.6	109.3	92.9	1,394	1,858	2,323	
Southgate	45.3	36.3	30.8	463	617	771	
West Grey	9.3	7.5	6.4	95	127	159	
<b>Grey County</b>	<b>371.8</b>	<b>297.4</b>	<b>252.8</b>	<b>3,792</b>	<b>5,056</b>	<b>6,320</b>	

Source: Hemson Consulting Ltd. based on Municipal data provided.

\*80% Net to gross adjustment

\*\*15% Adjustment for Underutilization and Long-term Vacancy.

Based on the density assumptions applied, there appears to be a significant amount of designated industrial land within the County to accommodate growth in employment land employment, which will be the focus for traditional types of employment such as manufacturing and other industrial-oriented uses. The marketability and timing of development will be affected by factors such as shovel-readiness and location.

Population-related employment growth is anticipated to occur primarily in commercial areas and throughout all designations in response to growth in the resident population. Rural-based employment growth will also occur within industrial and rural areas, as appropriate.

Although there is some variation in the aggregated totals from the County, MPAC and local municipal data sources, ultimately both land supply inventories suggest a fairly significant amount of vacant designated lands available to accommodate future population and employment growth on a County-wide basis. It is not anticipated that additional lands will need to be designated in order to meet the needs of expected



growth under the updated GMS forecasts. The growth forecasts, local allocations and designated land supply will be reviewed at regular intervals in order to reflect the most currently available information on growth patterns and economic and demographic trends in the County.

### **C. CONSULTATION HIGHLIGHTS LOCAL PRIORITIES AND LIMITS TO GROWTH**

Consultation was undertaken with local municipal and industry stakeholders in order to better understand growth and development trends from local perspectives, considering priorities, potential opportunities and constraints on growth. Some key considerations include:

- Limits to existing servicing capacity and high costs of infrastructure expansion may place limits on growth for some Grey municipalities, in particular for Southgate and Chatsworth.
- There are adequate residential lands within the County however there may be a lack of shovel-ready employment lands in some municipalities, notably, Southgate and Georgian Bluffs.
- Much of the designated greenfield land supply across the County is privately serviced, including a large rural area. It is acknowledged that most growth will be directed to areas with full municipal servicing, as directed by the PPS.
- Despite an overall slowing growth trend in the County, many Grey municipalities have new residential development underway.
- The aging population, out-migration of youth and loss of local industries are affecting long-term growth and economic prospects in the County.
- There is great opportunity for growth in the recreation and retirement-oriented markets. A challenge will be to attract and retain young, skilled workers and high quality employers.
- The level of seasonal recreational residential development varies across the County. There is some concern about variable demand placed on services in some municipalities, in particular for Blue Mountains.



Taking the range of policy, market, supply and local priorities into consideration, the County-wide forecasts of population, housing and employment has been distributed among Grey's local municipalities, as presented in the following section.



## V LOCAL DISTRIBUTION OF FORECAST GROWTH

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The results of the local municipal growth allocations for population, housing and employment from a 2011 to 2041 horizon are presented below. Emphasis is on the 2016 to 2036 timeframe as this represents a twenty year planning horizon and will be the likely planning horizon for subsequent updates to the *Grey County Official Plan*. There are no major shifts anticipated in the overall distribution of population, housing and employment in the County.

### A. LOCAL GROWTH ALLOCATIONS

The County-wide reference forecasts have been distributed to Grey's nine local municipalities based on a combination of planning policy, historic growth, market demand, consultation with local municipal and industry stakeholders and the capacity to accommodate growth from land supply and servicing perspectives. Shares of household growth have been allocated to each member municipality based on these considerations. The forecast population is then determined by applying average household sizes to the household forecast.

The draft allocation of forecast growth is presented for consideration by the County and municipal stakeholders and will be refined as appropriate based on feedback received. A summary of the results is provided in the tables below.

Table 26 indicates the shares of household growth that provided that basis for the distribution of population and housing growth.



Table 26 Municipal Shares of County-wide Household Forecast 2016-2036	
Municipality	Share of County-wide Housing Growth
Blue Mountains	16.1%
Chatsworth	4.8%
Georgian Bluffs	11.6%
Grey Highlands	11.9%
Hanover	6.8%
Meaford	13.0%
Owen Sound	17.1%
Southgate	7.7%
West Grey	11.0%

Source: Hemson Consulting Ltd.

As shown above, the highest share of the County-wide forecast growth has been allocated to the City of Owen Sound, reflecting its historic role as a population and service centre within the County and significant identified capacity to accommodate growth. The Town of the Blue Mountains similarly has a high share of forecast housing growth, consistent with observed and anticipated trends.

The balance of forecast growth is relatively evenly distributed between Grey communities, considering local capacities and growth trends. The Township of Chatsworth is anticipated to experience a more modest share of County-wide growth owing to its rural serviced character.

## B. HOUSEHOLDS

Table 27 indicates the forecast of permanent population housing units by local municipality from 2011 to 2041, highlighting growth over the 2016 to 2036 planning period.



Table 27

Housing Unit Forecast by Local Municipality Grey County, 2011-2041							
Municipality	Housing Units (Occupied Households)					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	2,850	3,060	3,700	3,850	3,960	790	1.15%
Chatsworth	2,480	2,560	2,740	2,780	2,810	220	0.41%
Georgian Bluffs	4,100	4,330	4,810	4,890	4,970	560	0.61%
Grey Highlands	3,750	3,920	4,410	4,510	4,580	590	0.70%
Hanover	3,180	3,270	3,530	3,600	3,650	330	0.48%
Meaford	4,640	4,780	5,290	5,410	5,500	630	0.62%
Owen Sound	9,610	9,750	10,390	10,580	10,740	830	0.41%
Southgate	2,640	2,750	3,050	3,120	3,170	370	0.63%
West Grey	4,880	5,090	5,530	5,620	5,700	530	0.50%
<b>Grey County</b>	<b>38,130</b>	<b>39,510</b>	<b>43,450</b>	<b>44,360</b>	<b>45,080</b>	<b>4,850</b>	<b>0.58%</b>

Source: Hemson Consulting Ltd.

As shown, all Grey municipalities will continue to add households over the forecast horizon, with the highest levels of absolute growth anticipated within the municipalities of Owen Sound, Blue Mountains, Meaford and Grey Highlands.

Georgian Bluffs, Southgate and West Grey are also expected to experience relatively high rates of housing growth within a modest overall housing growth outlook.

More modest growth in households is anticipated for Chatsworth, reflecting its more rural nature.

### C. POPULATION

Tables 28 and 29 indicate forecast local municipal Census and total population including Census Net Undercoverage.



Table 28

Forecast Census Population by Local Municipality Grey County, 2011 - 2041							
Municipality	Census Population					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	6,450	6,850	8,130	8,460	8,700	1,610	1.06%
Chatsworth	6,440	6,550	6,950	7,080	7,160	530	0.39%
Georgian Bluffs	10,400	10,840	11,870	12,140	12,330	1,300	0.57%
Grey Highlands	9,520	9,800	10,850	11,090	11,290	1,290	0.62%
Hanover	7,490	7,620	8,190	8,370	8,480	750	0.47%
Meaford	11,100	11,260	12,310	12,620	12,840	1,360	0.57%
Owen Sound	21,690	21,740	23,010	23,520	23,880	1,780	0.39%
Southgate	7,190	7,380	8,130	8,330	8,470	950	0.61%
West Grey	12,290	12,620	13,510	13,780	13,960	1,160	0.44%
<b>Grey County</b>	<b>92,570</b>	<b>94,660</b>	<b>102,950</b>	<b>105,390</b>	<b>107,110</b>	<b>10,730</b>	<b>0.54%</b>

Source: Hemson Consulting Ltd.

Rates of population growth are anticipated to lag growth of occupied households across Grey County, an outcome of the aging population and resulting decline in average household size.

Population growth is somewhat balanced throughout the County, with the largest concentrations of absolute growth in population anticipated for Blue Mountains, Owen Sound, Meaford, Georgian Bluffs and Grey Highlands.

Table 29

Forecast Total Population by Local Municipality Grey County, 2011 - 2041							
Municipality	Total Population (includes Census Net Undercoverage)					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	6,610	7,010	8,320	8,660	8,910	1,650	1.06%
Chatsworth	6,590	6,700	7,120	7,250	7,330	550	0.40%
Georgian Bluffs	10,650	11,090	12,150	12,430	12,630	1,340	0.57%
Grey Highlands	9,750	10,040	11,110	11,360	11,560	1,320	0.62%
Hanover	7,670	7,800	8,390	8,570	8,690	770	0.47%
Meaford	11,360	11,530	12,600	12,920	13,150	1,390	0.57%
Owen Sound	22,200	22,250	23,550	24,080	24,460	1,830	0.40%
Southgate	7,360	7,560	8,330	8,530	8,670	970	0.61%
West Grey	12,580	12,920	13,830	14,110	14,300	1,190	0.44%
<b>Grey County</b>	<b>94,770</b>	<b>96,900</b>	<b>105,400</b>	<b>107,910</b>	<b>109,700</b>	<b>11,010</b>	<b>0.54%</b>

Source: Hemson Consulting Ltd.



## D. EMPLOYMENT

Table 30 indicates forecast total Place of Work employment by local municipality from 2011 to a 2041 horizon, again highlighting growth over the 2016 to 2036 planning period.

Forecast Total Employment by Local Municipality Grey County, 2011 - 2041							
Municipality	Total Place of Work Employment					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	4,000	4,170	4,210	4,330	4,500	160	0.19%
Chatsworth	1,650	1,710	1,730	1,780	1,850	70	0.20%
Georgian Bluffs	3,010	3,170	3,200	3,280	3,430	110	0.17%
Grey Highlands	3,780	3,940	3,970	4,080	4,270	140	0.17%
Hanover	6,000	6,190	6,230	6,370	6,600	180	0.14%
Meaford	3,330	3,420	3,450	3,540	3,690	120	0.17%
Owen Sound	15,130	15,500	15,590	15,940	16,500	440	0.14%
Southgate	1,980	2,070	2,090	2,160	2,280	90	0.21%
West Grey	3,150	3,300	3,340	3,430	3,600	130	0.19%
<b>Grey County</b>	<b>42,030</b>	<b>43,470</b>	<b>43,810</b>	<b>44,910</b>	<b>46,720</b>	<b>1,440</b>	<b>0.16%</b>

Source: Hemson Consulting Ltd.

A moderate outlook for employment growth is split relatively evenly among Grey municipalities with the largest concentration of growth in Owen Sound, reflecting its role as an economic centre in the County.

The employment forecast is divided into three land-use based categories:

- Population-related employment is employment that primarily serves a resident population and includes retail, education, healthcare, and local government. This generally grows in line with population growth.
- Employment-land employment refers to traditional industrial-type employment primarily accommodated in low-rise industrial buildings in business parks and employment areas.
- Rural-based employment refers to jobs scattered throughout the rural area, primarily related to agricultural and primary industries. Tables 31, 32 and 33 on the following page indicate the distribution of employment by type among Grey's local municipalities.



Forecast Population-Related Employment by Local Municipality Grey County, 2011 - 2041							
Municipality	Population Related Employment					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	2,420	2,530	2,550	2,620	2,730	90	0.17%
Chatsworth	620	640	650	670	700	30	0.23%
Georgian Bluffs	1,380	1,480	1,500	1,540	1,610	60	0.20%
Grey Highlands	1,410	1,470	1,490	1,530	1,600	60	0.20%
Hanover	2,910	2,960	2,980	3,020	3,090	60	0.10%
Meaford	1,920	1,960	1,980	2,030	2,110	70	0.18%
Owen Sound	8,250	8,320	8,360	8,490	8,690	170	0.10%
Southgate	630	670	690	720	770	50	0.36%
West Grey	1,200	1,270	1,290	1,330	1,400	60	0.23%
<b>Grey County</b>	<b>20,740</b>	<b>21,300</b>	<b>21,490</b>	<b>21,950</b>	<b>22,700</b>	<b>650</b>	<b>0.15%</b>

Source: Hemson Consulting Ltd.

Forecast Employment Land Employment by Local Municipality Grey County, 2011 - 2041							
Municipality	Employment Land Employment					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	890	930	940	970	1,010	40	0.21%
Chatsworth	500	520	520	540	560	20	0.19%
Georgian Bluffs	960	1,000	1,000	1,030	1,080	30	0.15%
Grey Highlands	1,590	1,660	1,670	1,720	1,800	60	0.18%
Hanover	3,090	3,230	3,250	3,350	3,510	120	0.18%
Meaford	630	650	660	680	710	30	0.23%
Owen Sound	6,880	7,180	7,230	7,450	7,810	270	0.18%
Southgate	500	520	520	540	570	20	0.19%
West Grey	930	970	980	1,010	1,060	40	0.20%
<b>Grey County</b>	<b>15,970</b>	<b>16,660</b>	<b>16,770</b>	<b>17,290</b>	<b>18,110</b>	<b>630</b>	<b>0.19%</b>

Source: Hemson Consulting Ltd.

Forecast Rural-Based Employment by Local Municipality Grey County, 2011 - 2041							
Municipality	Rural Based Employment					2016-2036	
	2011	2016	2031	2036	2041	Net Change	Compound Annual Growth Rate
Blue Mountains	690	710	720	740	760	30	0.21%
Chatsworth	530	550	560	570	590	20	0.18%
Georgian Bluffs	670	690	700	710	740	20	0.14%
Grey Highlands	780	810	810	830	870	20	0.12%
Hanover	-	-	-	-	-	n/a	n/a
Meaford	780	810	810	830	870	20	0.12%
Owen Sound	-	-	-	-	-	n/a	n/a
Southgate	850	880	880	900	940	20	0.11%
West Grey	1,020	1,060	1,070	1,090	1,140	30	0.14%
<b>Grey County</b>	<b>5,320</b>	<b>5,510</b>	<b>5,550</b>	<b>5,670</b>	<b>5,910</b>	<b>160</b>	<b>0.14%</b>

Source: Hemson Consulting Ltd.



- It is noted that there may be some additional growth in the rural employment category beyond what is forecast, related to on-farm activity, largely of the County's Mennonite communities and associated employment.

## **E. OUTLOOK FOR SEASONAL UNITS**

The County's location along the shoreline of Georgian Bay along with its unique natural amenities and character, contribute to its attractiveness for residential development oriented to seasonal and recreational units in many Grey communities. A key consideration in planning for future housing growth and development in the County is the role that these seasonal and recreational units play as a component of total housing stock. Seasonal and recreational units do not contribute to a community's permanent population but do result in increased demand for land, services and infrastructure while also contributing to the local economy.

Statistics Canada reports both occupied housing units and total housing units. In Grey, the difference between the two is primarily these seasonal and recreational units. The count of these units which did not house any permanent population rose from 7,200 in 2006 to 8,400 in 2011 and accounted for 18% of total housing units County-wide, with significant variation at the local municipal level. While many of these units are in traditional recreational settings such as Blue Mountain or shoreline locations on Georgian Bay, in some communities, such as Grey Highlands, there are also an increasing number of recreational units found in urban areas and in scattered rural non-water-based locations.

The 2011 shares of vacant or seasonal and recreational units by local municipality are shown on Map 3 below.



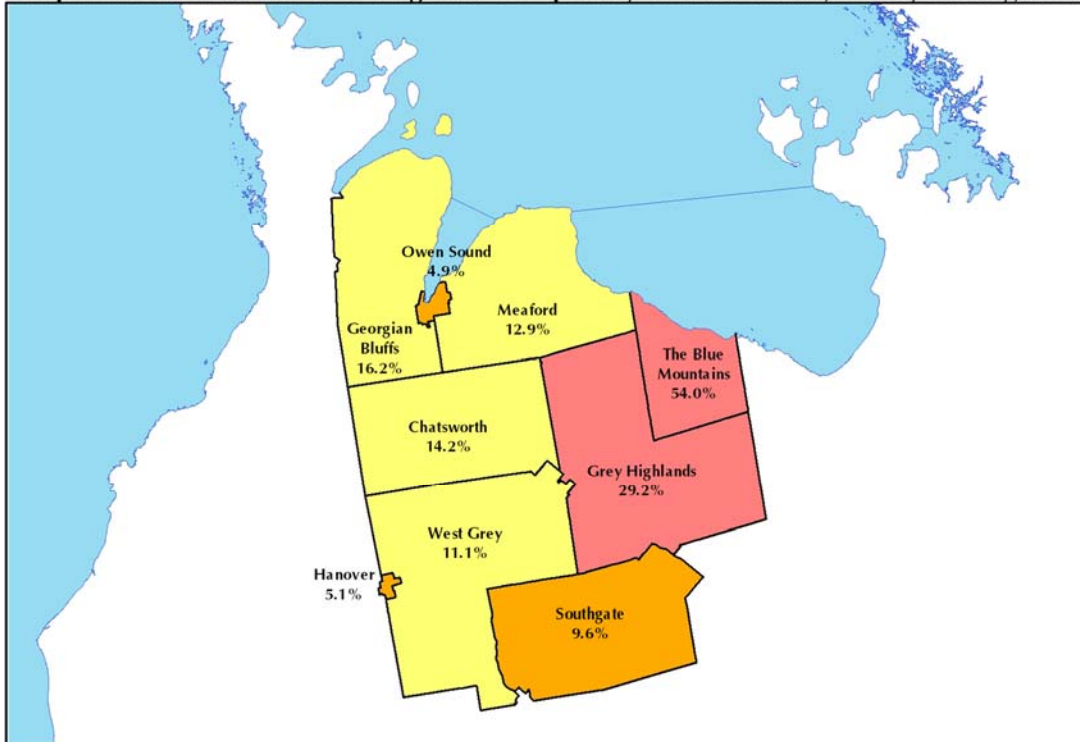
**Map 3: % of Total Private Dwellings Not Occupied by Usual Residents, County of Grey, 2011**

Table 34 indicates how the proportion of seasonal and recreational and vacant units as a component of total private dwellings changed within Grey's local municipalities between 2001 and 2011.

Table 34 Proportion of Total Housing Units Not Occupied by Usual Grey County by Local Municipality, 2001-2011			
Municipality	2001	2006	2011
Blue Mountains	52%	48%	54%
Chatsworth	15%	14%	15%
Georgian Bluffs	15%	14%	17%
Grey Highlands	27%	28%	29%
Hanover	3%	5%	6%
Meaford	7%	14%	13%
Owen Sound	4%	4%	5%
Southgate	9%	8%	10%
West Grey	11%	10%	11%
<b>Grey County</b>	<b>16%</b>	<b>16%</b>	<b>18%</b>

Source: Statistics Canada.



Overall, the share of seasonal and recreational and vacant units has increased marginally at the County-level since 2001, from 16% in 2001 to 18% in 2011. This proportion varies greatly at the local municipal level, based on location and natural amenities. The highest proportion of vacant or seasonal recreational units are found in Grey Highlands, Georgian Bluffs and Blue Mountains, in the latter of which these units have come to account for nearly 55% of total housing stock.

The balance between occupied households and total private dwellings – that is the share of vacant, seasonal and recreational units – have not shifted significantly in any Grey local municipalities over the past decade. Looking ahead, it is likely that the growth in seasonal recreational units will occur relatively in line with historic trends to the extent that the land supply for these types of units is available, in particular along shorelines where demand is greatest. This type of development will be a combination of low density residential on private or partial services within the Inland Lakes and Shorelines and Escarpment Recreation designations and low to medium density development on full services in the Recreational Resort Recreation. Taken together, these designations comprise a vacant designated supply of over 1,000 gross hectares within the County.

Over the course of the forecast period, the proportion of seasonal and recreational units will grow and retract, in particular as units are converted to permanent residences and back to seasonal units over time through changes in ownership and in response to demographic change. However, it is not anticipated that any significant divergence from the overall observed pattern will occur.

A proportion of the increment between occupied households and total private dwellings is vacant units, on average around 5% based on estimates from Statistics Canada. Considering this, the outlook for seasonal recreational units within Grey's local municipalities is based on a 5% adjustment to the forecast occupied households to reflect vacancy and a continuation of the 2011 share of units not occupied by usual residents.

The results are provided in Table 35 which indicates forecast occupied dwelling units, vacant dwellings and seasonal recreational units at a 2036 planning horizon. Taken together, these elements comprise the outlook for total private dwellings.



<div>Table 35</div> <div>Housing Outlook by Dwelling Characteristics</div> <div>Grey County by Local Municipality, 2036</div>				
Municipality	2036 Forecast Totals			
	Occupied Households	Vacant Units	Seasonal Recreational Units	Total Private Dwellings
Blue Mountains	3,850	230	4,300	<b>8,380</b>
Chatsworth	2,780	20	440	<b>3,240</b>
Georgian Bluffs	4,890	50	900	<b>5,840</b>
Grey Highlands	4,510	90	1,770	<b>6,370</b>
Hanover	3,600	190	0	<b>3,790</b>
Meaford	5,410	40	760	<b>6,210</b>
Owen Sound	10,580	540	0	<b>11,120</b>
Southgate	3,120	20	310	<b>3,450</b>
West Grey	5,620	40	670	<b>6,330</b>
<b>Grey County</b>	<b>44,360</b>	<b>1,220</b>	<b>9,150</b>	<b>54,730</b>

Source: Hemson Consulting Ltd.

Based on the above, Table 36 indicates the estimated growth in seasonal recreational units from a 2016 to a 2036 horizon.

<div>Table 36</div> <div>Growth Outlook for Seasonal Recreational Units</div> <div>Grey County by Local Municipality, 2016 - 2036</div>			
Municipality	Estimated Seasonal Recreational Units		
	2011	2036	Net Change
Blue Mountains	3250	4300	<b>1050</b>
Chatsworth	390	440	<b>50</b>
Georgian Bluffs	770	900	<b>130</b>
Grey Highlands	1500	1770	<b>270</b>
Hanover	0	0	<b>0</b>
Meaford	670	760	<b>90</b>
Owen Sound	0	0	<b>0</b>
Southgate	270	310	<b>40</b>
West Grey	580	670	<b>90</b>
<b>Grey County</b>	<b>7430</b>	<b>9150</b>	<b>1720</b>

Source: Hemson Consulting Ltd.

The Town of the Blue Mountains is anticipated to experience the greatest level of seasonal recreational unit growth, consistent with its historically significant share of these types of units and an expectation of continued demand for the municipalities



natural recreational amenities. Georgian Bluffs and Grey Highlands are also anticipated to see relatively higher levels of these types of units.

Overall, no major shifts in the pattern of growth or major concentrations of population, housing or employment are anticipated in the County. The local municipal allocations of forecast population, permanent and seasonal housing, and employment were reviewed by local municipal planning staff who were given the opportunity to provide comments on the draft results. No concerns with the forecast distribution were raised. The County-wide reference growth scenario and local allocations have been endorsed by County staff and provide a basis for a forthcoming update to the *Grey County Official Plan*.



## **VI CONCLUSIONS AND RECOMMENDATIONS**

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This report has presented the results of the updated Grey County GMS, including updated forecasts of population, housing and employment growth from a 2011 to 2041 horizon with an emphasis on the twenty year planning horizon from 2016 to 2036. Forecast growth has been allocated to local municipalities in Grey to provide a basis for planning in the County. The County land supply inventory has also been reviewed and updated with estimates made on the capacity to accommodate residential and employment growth.

### **Key Conclusions:**

- Grey County has experienced moderate growth in population over recent periods, with housing growth outpacing population due to the aging of the population and resulting decline in average household size. Employment declined somewhat over the most recent Census period amidst a shifting economy. The growth that has been occurring over recent Census periods has been unevenly distributed among Grey's local municipalities and continues to reinforce the general pattern of population, housing and employment concentrations in the County.
- Population and housing growth in Grey has been slower over the most recent Census period than was anticipated under the 2008 GMS forecasts – the County's 2011 population was 7,400 fewer than forecast; households, 2,350 fewer. At the same time, those forecasts somewhat underestimated 2011 employment in the County. The current update takes into account more recently available information and considers the County's future growth outlook in the context of recent and emerging economic and demographic trends.
- Three County-wide forecast scenarios were prepared and reviewed by County staff – a low, reference and high outlook based on varied assumptions about future demographic and economic conditions in Grey. The reference scenario represents the most likely outcome for Grey based on our current understanding of economic and demographic trends affecting the pattern and pace of growth and development in the County. Grey County planning staff endorsed the reference scenario which forms the basis for local allocations of growth presented in this report.



- An outlook on seasonal recreational units has also been prepared. Seasonal recreational units have represented a significant portion of the housing stock for some municipalities in Grey, with the County averaging approximately 18% of total housing not occupied by usual residents since 2001. Planning for growth in the County must take into account the effects of these units which do not add to the permanent population base but do require municipal services and contribute to the local economy.
- Under the reference forecast scenario, Grey County is anticipated to add 11,000 residents over a 2016 to 2036 planning horizon, growing to a total population, including Census net undercoverage, of 107,900 in 2036. Housing growth is anticipated to out-pace population owing to the aging population trend and resulting decline in household size. The County is forecast to add 4,900 households between 2016 and 2036. Another 1,700 seasonal recreational units are anticipated over the planning horizon. Employment in Grey is forecast to grow moderately over the forecast horizon to 2036 total employment of 48,000.
- The reference forecast growth has been allocated to local municipalities in Grey taking into account planning policy direction, historical and recent growth patterns, emerging economic and demographic trends and the capacity to accommodate growth from land supply and servicing perspectives. Overall, no major shifts in the pattern of growth in the County are anticipated.
- A review and update to the County land supply inventory was undertaken, resulting in the identification of over 2,300 gross ha of vacant urban designated lands across Grey's local municipalities, more than sufficient to meet demand over a twenty-year planning horizon.

#### Recommendations:

- It is recommended that the County update the *Grey County Official Plan*, revising Tables 1,2 and 3 of the official plan to incorporate the updated GMS forecasts and local allocations of population, housing and employment growth to 2031 and the extended planning horizon to 2036.
- At this time, there is no identified need to expand urban boundaries in order to accommodate the growth outlook for housing or employment at a County or local municipal level. The County should continue to monitor and maintain an updated land budget going forward in order to ensure an adequate supply over the long-term.



- Consistent with the Provincial Policy Statement, housing growth should be directed to designated settlement areas, in particular where full urban services are planned or available. It is recommended that the County remove Table 4 from the official plan and the specific growth targets for settlement area housing growth and replace with a policy worded at directing growth to settlement areas, recognizing that some minimal growth will continue to occur in the rural area.
- Update Table 5 of the official plan to incorporate the updated outlook for seasonal recreational units and extending the horizon from a 2011 to 2036 horizon.
- The County should continue to monitor on-farm small-scale industrial and commercial uses in order to ensure that the level and pace of this type of development does not compromise Provincial, County or local municipal objectives for rural and agricultural areas. At the same time recognition should be given to the role these types of businesses have and may continue to play in the local economy of Grey communities, in particular during times of economic downturn.
- The forecasts which form the basis of the GMS should be monitored and updated at regular intervals, recognizing the inherent uncertainty in forecasting and the complex range of planning policy, demographic and economic factors affecting how growth will ultimately play out, on-the-ground. Regular review and update based on the most currently available information will help to ensure that the County and local municipalities in Grey are planning for growth and development in a manner consistent with Provincial policy and supportive of achieving a healthy and sustainable growth outlook over the long-term.



## **Appendix**

### **Land Supply Inventory – Mapping and Tables**



Vacant Land Supply - Summary  
County of Grey  
Based on MPAC vacant land codes and County OP land-use designations

Vacant Land Supply - All Residential MPAC Codes (Ha) Municipal Totals based on County Wide OP Designations County of Grey, 2012													
	County OP Designated												
	Primary	Secondary	Tertiary	Space Extensive Commercial	Space Extensive Industrial	Inland Lakes & Shoreline	Recreational Resort	Escarpment Recreation	Draft Approved Plans	Total	Rural	Agricultural/ NEC*	Total**
Town of The Blue Mountains	72.5	-	2.0	-	-	-	258.6	344.5	(19.8)	657.8	751.7	2,921.7	4,331.2
Township of Chatsworth	-	84.1	1.7	-	-	2.2	-	-	(10.6)	77.4	2,756.1	432.4	3,266.0
Township of Georgian Bluffs	16.4	55.4	39.1	7.0	1.1	398.6	-	12.2	(44.9)	484.7	2,367.8	2,037.2	4,889.8
Municipality of Grey Highlands	15.6	136.9	16.4	-	-	19.6	1.7	87.6	(17.7)	260.1	1,667.5	2,452.3	4,380.0
Town of Hanover <sup>1</sup>	111.7	-	-	-	-	-	-	-	(6.3)	105.4	-	-	105.4
Municipality of Meaford	68.8	-	13.4	0.3	-	173.0	-	-	(7.4)	248.1	1,903.3	1,526.7	3,678.2
City of Owen Sound	211.6	-	-	-	-	-	-	-	(11.4)	200.2	-	1.3	201.5
Township of Southgate	81.2	3.2	20.6	-	-	6.3	-	-	(16.1)	95.3	840.7	347.7	1,283.7
Municipality of West Grey	68.0	12.6	12.9	-	-	0.8	-	-	(0.7)	93.7	3,577.6	200.8	3,872.0
<b>Grey County</b>	<b>645.8</b>	<b>292.1</b>	<b>106.0</b>	<b>7.3</b>	<b>1.1</b>	<b>600.6</b>	<b>260.3</b>	<b>444.3</b>	<b>(134.9)</b>	<b>2,222.8</b>	<b>13,864.8</b>	<b>9,920.2</b>	<b>26,007.8</b>

<sup>1</sup>There are no MPAC vacant codes currently in the Hanover Special Policy Area yet it has been included in a manner consistent with OPA19.

\*Agricultural includes OP layers: Agricultural, Special Agricultural and Niagara Escarpment

\*\*This total includes the Rural and Agricultural.

Vacant Land Supply - Commercial MPAC Codes (Ha) Municipal Totals based on County Wide OP Designations County of Grey, 2012													
	County OP Designated												
	Primary	Secondary	Tertiary	Space Extensive Commercial	Space Extensive Industrial	Inland Lakes & Shoreline	Recreational Resort	Escarpment Recreation	Draft Approved Plans	Total	Rural	Agricultural/ NEC*	Total**
Town of The Blue Mountains	4.3	-	-	-	-	-	0.7	-	-	5.0	-	-	5.0
Township of Chatsworth	-	0.2	-	-	-	-	-	-	-	0.2	-	-	0.2
Township of Georgian Bluffs	-	0.6	4.7	7.4	-	-	-	-	-	12.8	14.4	0.4	27.6
Municipality of Grey Highlands	0.6	1.8	-	-	-	-	-	102.2	-	104.5	1.9	-	106.4
Town of Hanover <sup>1</sup>	18.7	-	-	-	-	-	-	-	-	18.7	-	-	18.7
Municipality of Meaford	2.4	-	0.1	1.1	-	-	-	-	-	3.6	-	0.4	4.0
City of Owen Sound	36.0	-	-	-	-	-	-	-	-	36.0	-	-	36.0
Township of Southgate	7.0	0.1	-	-	-	-	-	-	-	7.1	5.9	-	13.0
Municipality of West Grey	0.8	0.2	-	-	-	-	-	-	-	1.0	0.1	-	1.1
<b>Grey County</b>	<b>69.9</b>	<b>2.8</b>	<b>4.8</b>	<b>8.5</b>	<b>-</b>	<b>-</b>	<b>0.7</b>	<b>102.2</b>	<b>-</b>	<b>188.9</b>	<b>22.4</b>	<b>0.8</b>	<b>212.1</b>

<sup>1</sup>There are no MPAC vacant codes currently in the Hanover Special Policy Area yet it has been included in a manner consistent with OPA19.

\*Agricultural includes OP layers: Agricultural, Special Agricultural and Niagara Escarpment

\*\*This total includes the Rural and Agricultural.

Vacant Land Supply - Industrial MPAC Codes (Ha) Municipal Totals based on County Wide OP Designations County of Grey, 2012													
	County OP Designated												
	Primary	Secondary	Tertiary	Space Extensive Commercial	Space Extensive Industrial	Inland Lakes & Shoreline	Recreational Resort	Escarpment Recreation	Draft Approved Plans	Total	Rural	Agricultural/ NEC*	Total**
Town of The Blue Mountains	28.9	-	-	-	-	-	-	-	-	28.9	-	-	28.9
Township of Chatsworth	-	-	-	-	-	-	-	-	-	-	-	-	-
Township of Georgian Bluffs	-	-	-	-	-	-	-	-	-	-	-	-	-
Municipality of Grey Highlands	17.2	-	-	-	-	-	-	-	-	17.2	9.2	30.6	56.9
Town of Hanover <sup>1</sup>	51.0	-	-	-	-	-	-	-	-	51.0	-	-	51.0
Municipality of Meaford	20.1	-	-	-	-	-	-	-	-	20.1	4.6	5.6	30.3
City of Owen Sound	125.2	-	-	-	-	-	-	-	-	125.2	-	-	125.2
Township of Southgate	16.3	-	-	-	-	-	-	-	-	16.3	5.8	-	22.2
Municipality of West Grey	1.3	-	-	7.8	-	-	-	-	-	9.1	8.6	-	17.8
<b>Grey County</b>	<b>260.0</b>	<b>-</b>	<b>-</b>	<b>7.8</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>267.9</b>	<b>28.2</b>	<b>36.2</b>	<b>332.2</b>

<sup>1</sup>There are no MPAC vacant codes currently in the Hanover Special Policy Area yet it has been included in a manner consistent with OPA19.

\*Agricultural includes OP layers: Agricultural, Special Agricultural and Niagara Escarpment

\*\*This total includes the Rural and Agricultural.



Vacant Land Supply - Summary  
County of Grey  
Based on MPAC vacant land codes and Municipal land-use designations

Vacant Land Supply Town of The Blue Mountains - County of Grey Based on MPAC Land-use Codes & Municipal OP Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	185.1	53.3	5.9	244.3	1,055.1	1,299.4
Commercial	1.3	4.3	-	5.6	-	5.6
Industrial	-	-	28.9	28.9	-	28.9
Total	186.4	57.6	34.8	278.8	1,055.1	1,333.9

Vacant Land Supply Township of Chatsworth - County of Grey Based on MPAC Land-use Codes & Municipal Zoning Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	100.5	10.4	12.8	123.7	2,418.1	2,541.8
Commercial	-	0.2	-	0.2	-	0.2
Industrial	1.4	-	6.0	7.4	33.8	41.2
Total	101.9	10.6	18.7	131.3	2,451.9	2,583.2

Vacant Land Supply Township of Georgian Bluffs - County of Grey Based on MPAC Land-use Codes & Municipal Zoning Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	363.6	7.0	18.9	389.5	1,258.4	1,647.9
Commercial	0.0	9.8	-	9.8	0.1	9.9
Industrial	-	-	43.9	43.9	-	43.9
Total	363.6	16.8	62.8	443.1	1,258.5	1,701.6

Vacant Land Supply Municipality of Grey Highlands - County of Grey Based on MPAC Land-use Codes & Zoning Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	364.2	0.6	4.5	369.3	2,483.2	2,852.5
Commercial	104.1	0.6	1.2	105.9	1.9	107.8
Industrial	-	-	17.2	17.2	56.4	73.6
Total	468.3	1.2	22.9	492.4	2,541.4	3,033.9

Vacant Land Supply Town of Hanover - County of Grey Based on MPAC Land-use Codes & Municipal OP Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	94.0	8.4	0.1	102.5	-	102.5
Commercial	0.0	19.4	-	19.4	-	19.4
Industrial	-	0.1	56.2	56.3	-	56.3
Total	94.1	27.9	56.3	178.3	-	178.3

Note: There are no MPAC vacant codes currently in the Hanover Special Policy Area yet it has been included in a manner consistent with OPA19.

Note: All draft approved plans have been netted out of the totals above.

Vacant Land Supply Municipality of Meaford - County of Grey Based on MPAC Land-use Codes & Municipal OP Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	204.9	5.3	-	210.2	2,332.4	2,542.5
Commercial	0.4	2.8	-	3.2	0.3	3.4
Industrial	5.5	8.0	13.3	26.8	14.1	41.0
Total	210.8	16.0	13.3	240.2	2,346.7	2,586.9

Vacant Land Supply City of Owen Sound - County of Grey Based on MPAC Land-use Codes & Municipal Zoning Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	163.5	1.1	5.5	170.2	-	170.2
Commercial	0.0	11.6	18.1	29.7	-	29.7
Industrial	-	4.4	132.2	136.6	-	136.6
Total	163.5	17.1	155.8	336.5	-	336.5

Vacant Land Supply Township of Southgate - County of Grey Based on MPAC Land-use Codes & Municipal Zoning Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	48.7	2.4	13.4	64.4	132.3	196.7
Commercial	0.5	1.0	0.1	1.6	-	1.6
Industrial	2.3	-	43.0	45.3	3.5	48.9
Total	51.5	3.4	56.5	111.3	135.8	247.1

Note: Zoning code 'Residential Type 6' is shown above as Residential - Rural.

Vacant Land Supply Municipality of West Grey - County of Grey Based on MPAC Land-use Codes & Municipal OP Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	66.8	1.2	11.9	79.9	3,722.1	3,802.0
Commercial	0.6	0.5	-	1.1	0.3	1.4
Industrial	0.1	7.8	1.4	9.3	22.0	31.3
Total	67.4	9.6	13.3	90.3	3,744.4	3,834.7

Vacant Land Supply Sum of All Municipalities Based on MPAC Land-use Codes & Municipal Designations						
MPAC	Municipal Land-use Designations					
	Residential	Commercial	Industrial	Sub-total	Rural	Total
Residential	1,591.3	89.8	72.9	1,754.0	13,401.5	15,155.5
Commercial	106.9	50.2	19.4	176.4	2.5	179.0
Industrial	9.3	20.3	342.1	371.8	129.9	501.6
Total	1,707.5	160.3	434.4	2,302.2	13,533.9	15,836.1








Vacant Land Supply - Notes to Summary  
County of Grey  
Based on MPAC vacant land codes and Municipal land-use designations

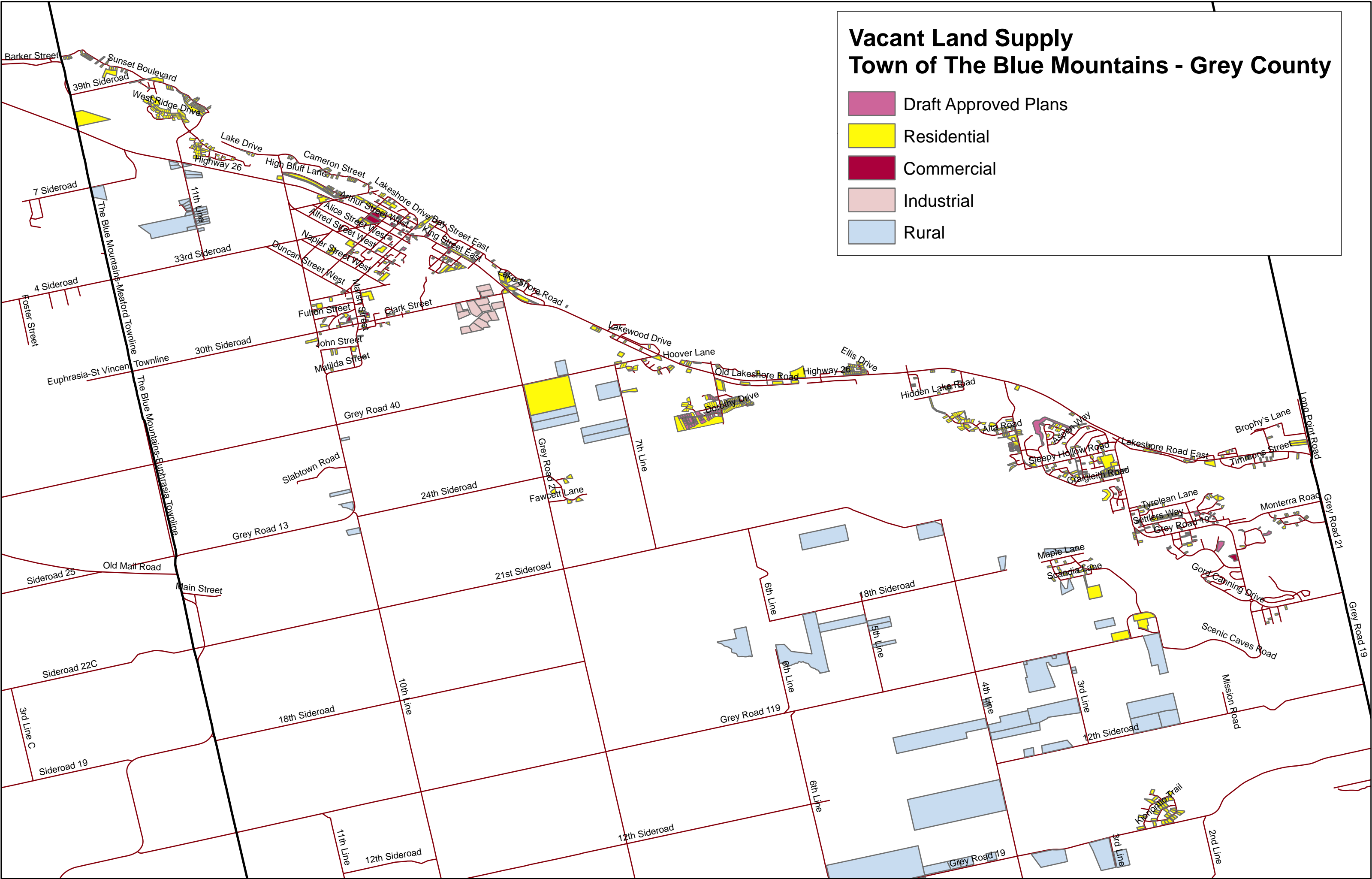
MPAC Land Use Codes	Selected Municipal Land-use Designations									
	Township of Chatsworth	Township of Georgian Bluffs	Municipality of Grey Highlands	Town of Hanover	Municipality of Meaford	City of Owen Sound	Township of Southgate	Town of The Blue Mountains	Municipality of West Grey	County of Grey
Residential (100,110,112)	Lake Residential Multiple Residential Rural Residential Tent & Trailer Urban Residential	General Residential Inland Lakes & Shoreline Residential Med-High Density Residential Med Density Residential Mobile Home Park Tent & Trailer Campground	Development Residential Residential Multiple Residential Shoreline Rural Residential	Residential Special Policy Areas 1 and 3	Settlement Area Shoreline Residential Urban Living Area	General Residential Low Density Residential Medium Density Residential Multiple Residential Single Residential	Mobile Home Park Residential Type 1-6	Estate Residential Low, Med Density Residential Primary Residential Recreational Residential Residential (Thornbury) Residential Infilling Resort Residential Secondary Residential Shoreline Residential Village Residential	Inland Lakes & Shoreline Primary Residential Secondary Tertiary	Escarpment Recreation Inland Lakes & Shoreline Primary Recreational Resort Secondary Space Extensive Commercial Space Extensive Industrial Tertiary
Commercial (105)	General Commercial Local Commercial Rural Commercial	General Commercial Rural Commercial Space Extensive Commercial	Downtown Commercial HWY & Service Commercial NHBD & Convenience NHBD & Convenience Commercial Rural Commercial	Corridor Commercial Downtown Commercial Large Format Commercial Recreational Commercial Restricted Commercial Industrial Special Policy Areas 1 and 2	Downtown Core Commercial Rural Highway Commercial Urban Highway Commercial	Arterial Commercial Core Commercial Mixed Use Commercial Neighbourhood Commercial Retail Commercial	Campground Commercial General Commercial Highway Commercial Local Commercial Recreational Commercial Space Extensive Commercial	Blue Mt. Resort Commercial Commercial (Thornbury) Harbour Commercial (Thornbury) Highway Commercial Recreational Commercial Village Commercial	Downtown Commercial Highway Commercial Space Extensive Commercial	Escarpment Recreation Inland Lakes & Shoreline Primary Recreational Resort Secondary Space Extensive Commercial Space Extensive Industrial Tertiary
Industrial (106)	Extractive Industrial General Industrial Local Industrial Rural Industrial	Extractive Industrial General Industrial	Extractive Industrial Heavy Industrial Light Industrial	Industrial Special Policy Areas 1, 2 and 3	Urban Employment Area	General Industrial Heavy Industrial Mixed Use Industrial	Extractive Industrial General Industrial	Community Industrial (Thornbury) Employment Lands Extractive Industrial	Industrial Space Extensive Industrial	Escarpment Recreation Inland Lakes & Shoreline Primary Recreational Resort Secondary Space Extensive Commercial Space Extensive Industrial Tertiary
Rural*	Rural	General Rural	Rural		Rural	Rural	Rural Commercial Rural Industrial	Rural Rural Employment Lands	Rural	Rural

\*For each municipality that has a rural area, all vacant MPAC land-use codes were applied (100,110,112,105,106) to the selected designations and were counted as Rural on the Summary page.



# Vacant Land Supply Town of The Blue Mountains - Grey County






-  Draft Approved Plans
-  Residential
-  Commercial
-  Industrial
-  Rural

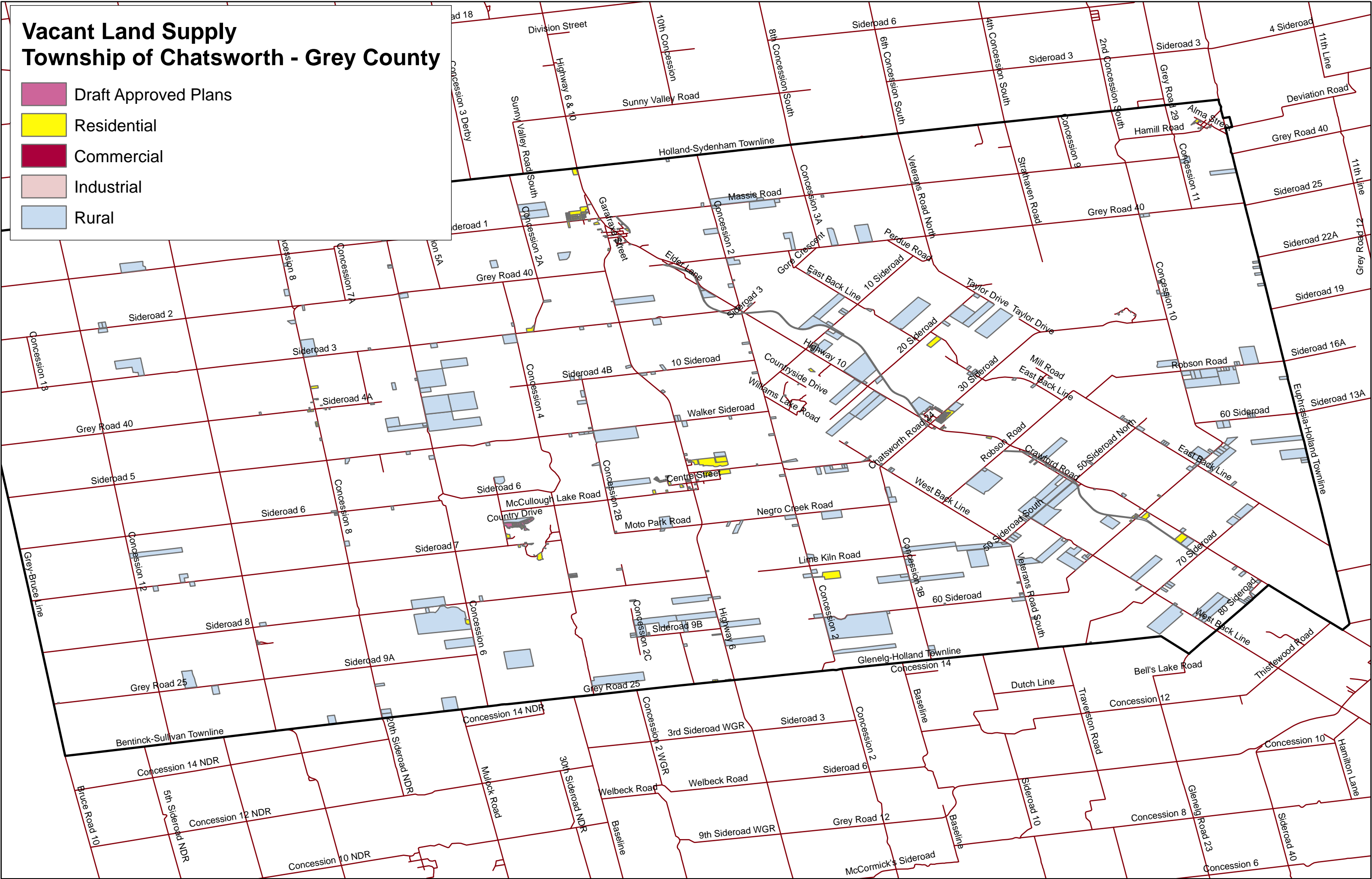




# Vacant Land Supply

## Township of Chatsworth - Grey County

-  Draft Approved Plans
-  Residential
-  Commercial
-  Industrial
-  Rural

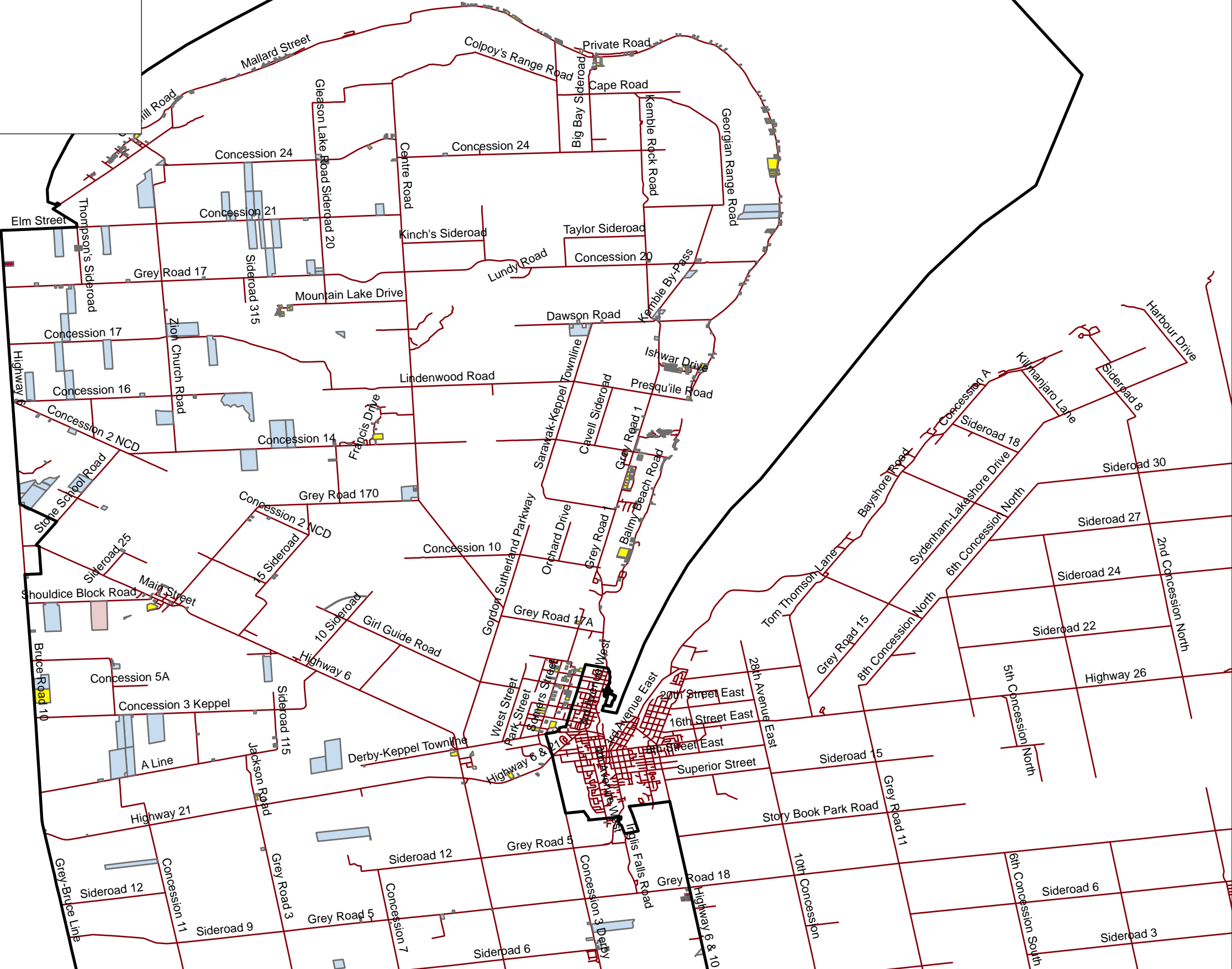




# Vacant Land Supply

## Township of Georgian Bluffs - Grey County

- Residential
- Commercial
- Industrial
- Rural





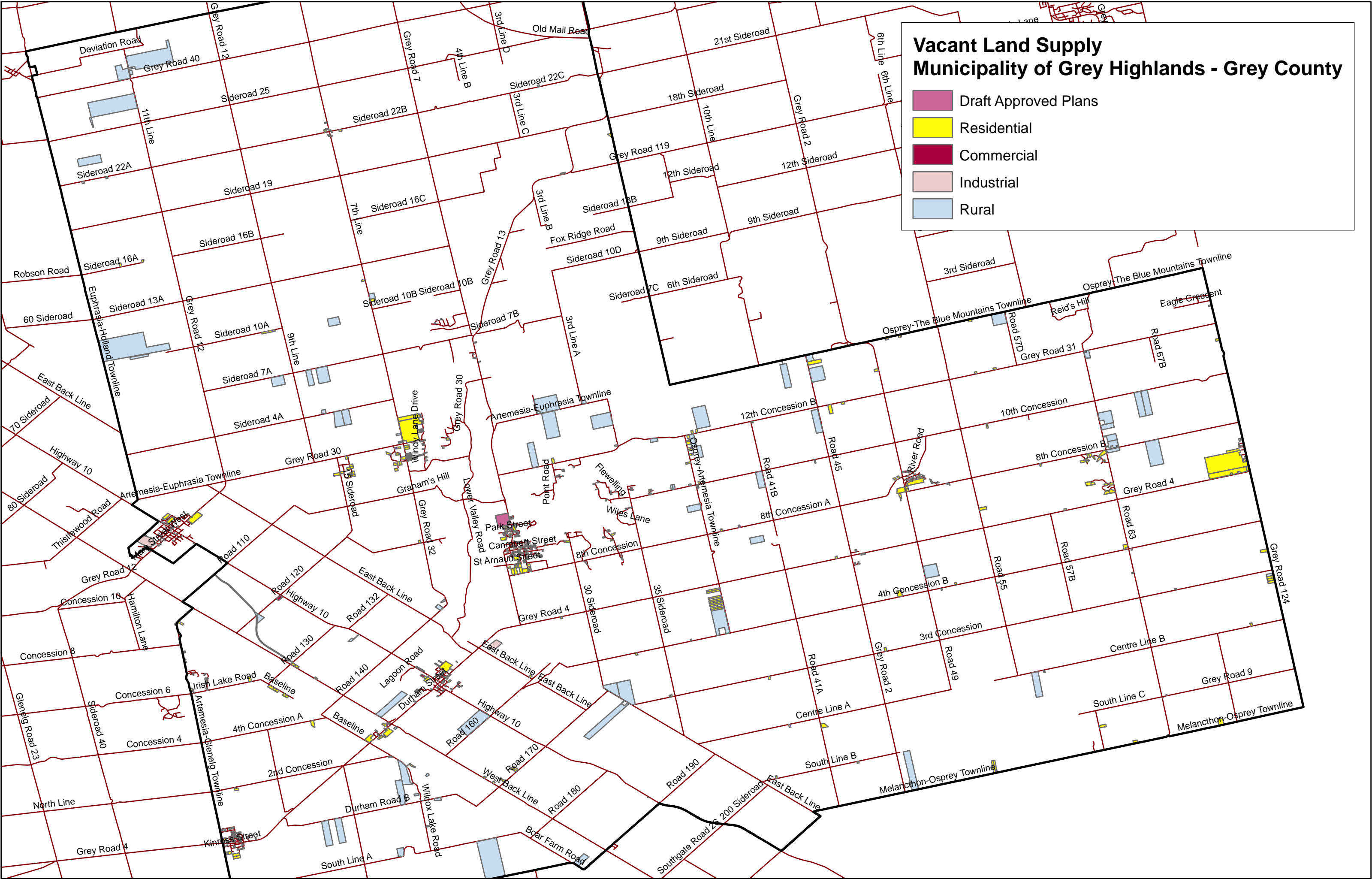
Draft Approved Plans

Residential

Commercial

Industrial



Rural

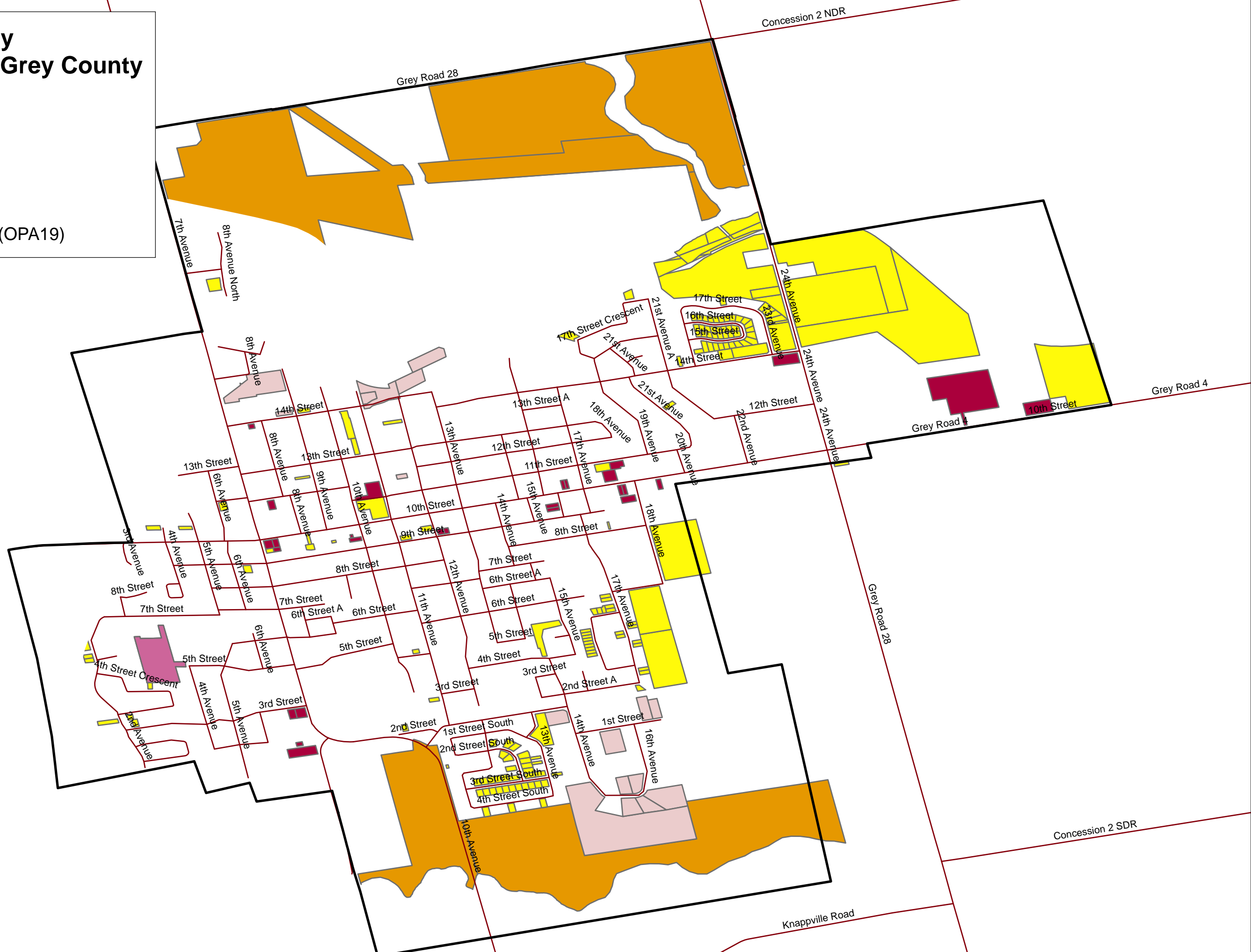




# Vacant Land Supply






## Town of Hanover - Grey County

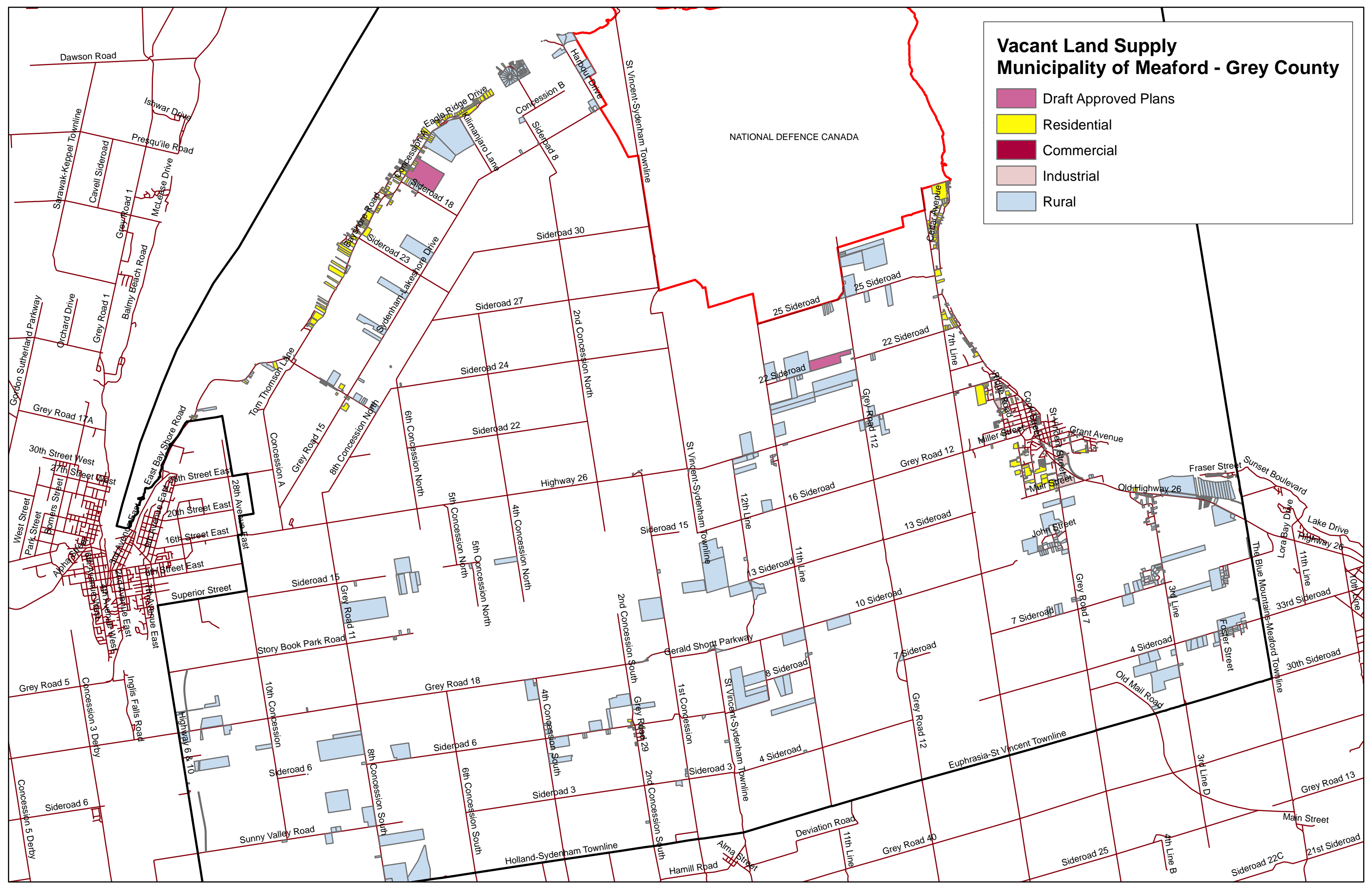
-  Draft Approved Plan
-  Residential
-  Commercial
-  Industrial
-  Special Policy Area (OPA19)





# Vacant Land Supply Municipality of Meaford - Grey County

-  Draft Approved Plans
-  Residential
-  Commercial
-  Industrial
-  Rural

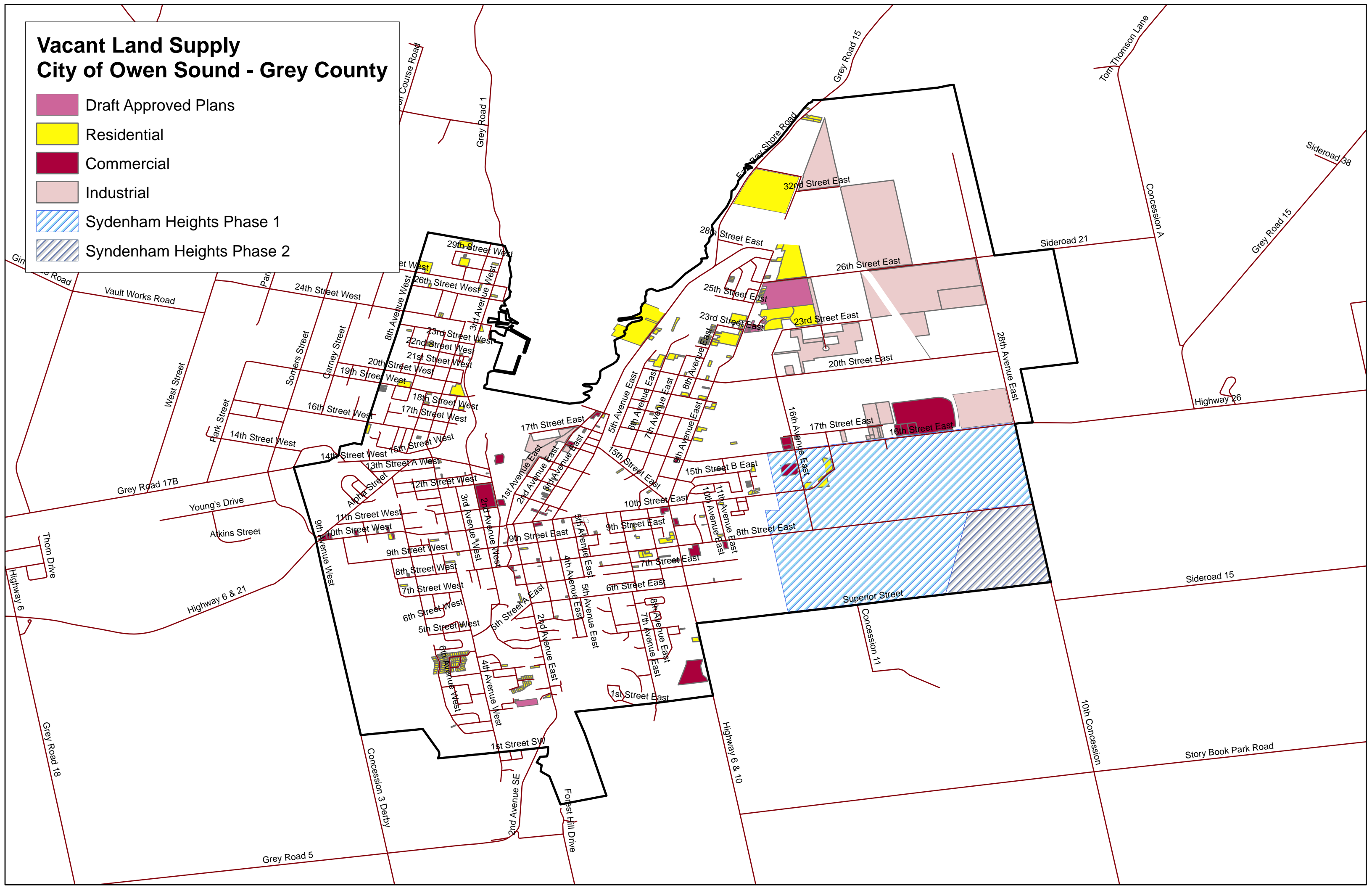




# Vacant Land Supply

## City of Owen Sound - Grey County






-  Draft Approved Plans
-  Residential
-  Commercial
-  Industrial
-  Sydenham Heights Phase 1
-  Sydenham Heights Phase 2

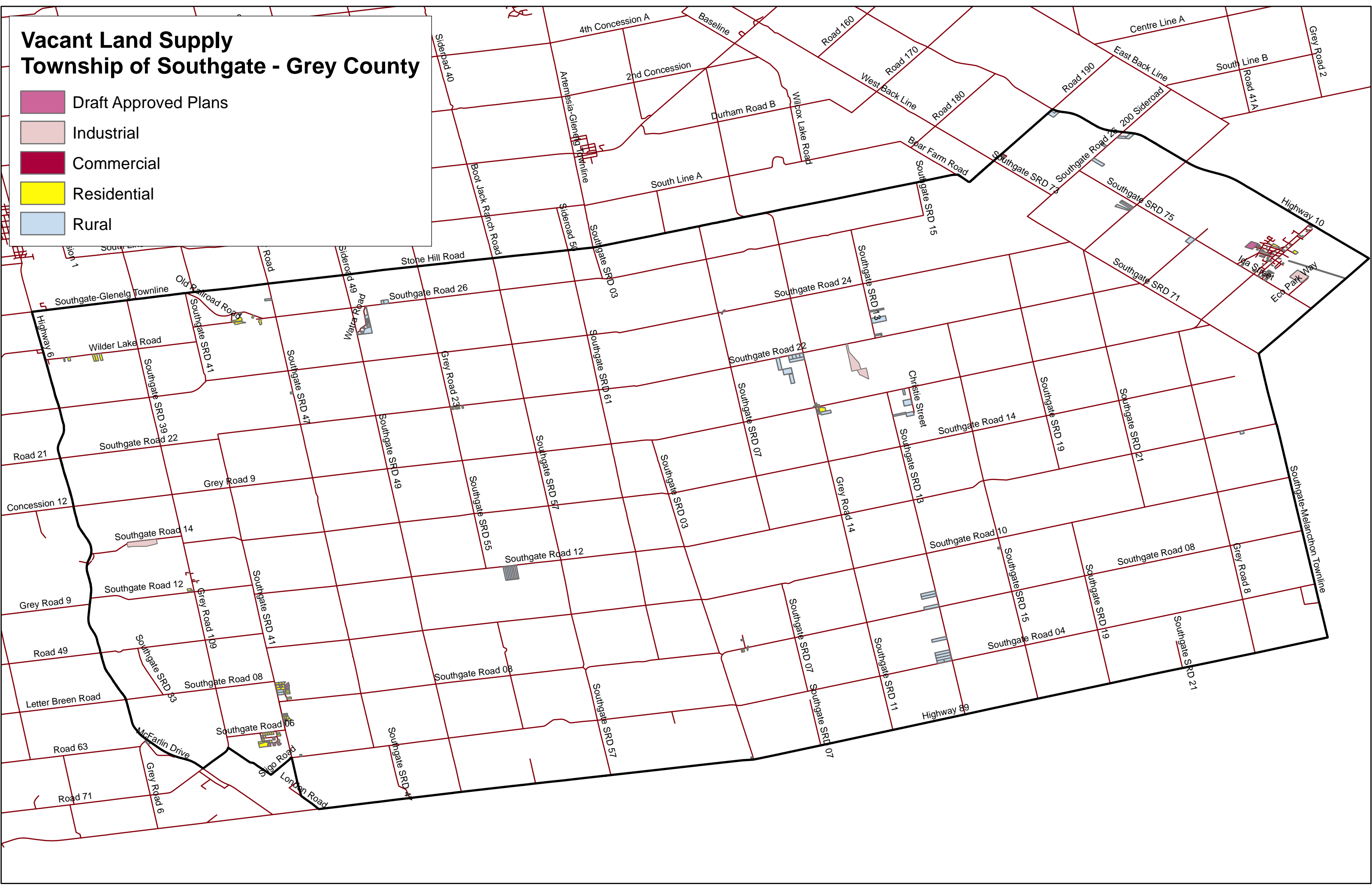




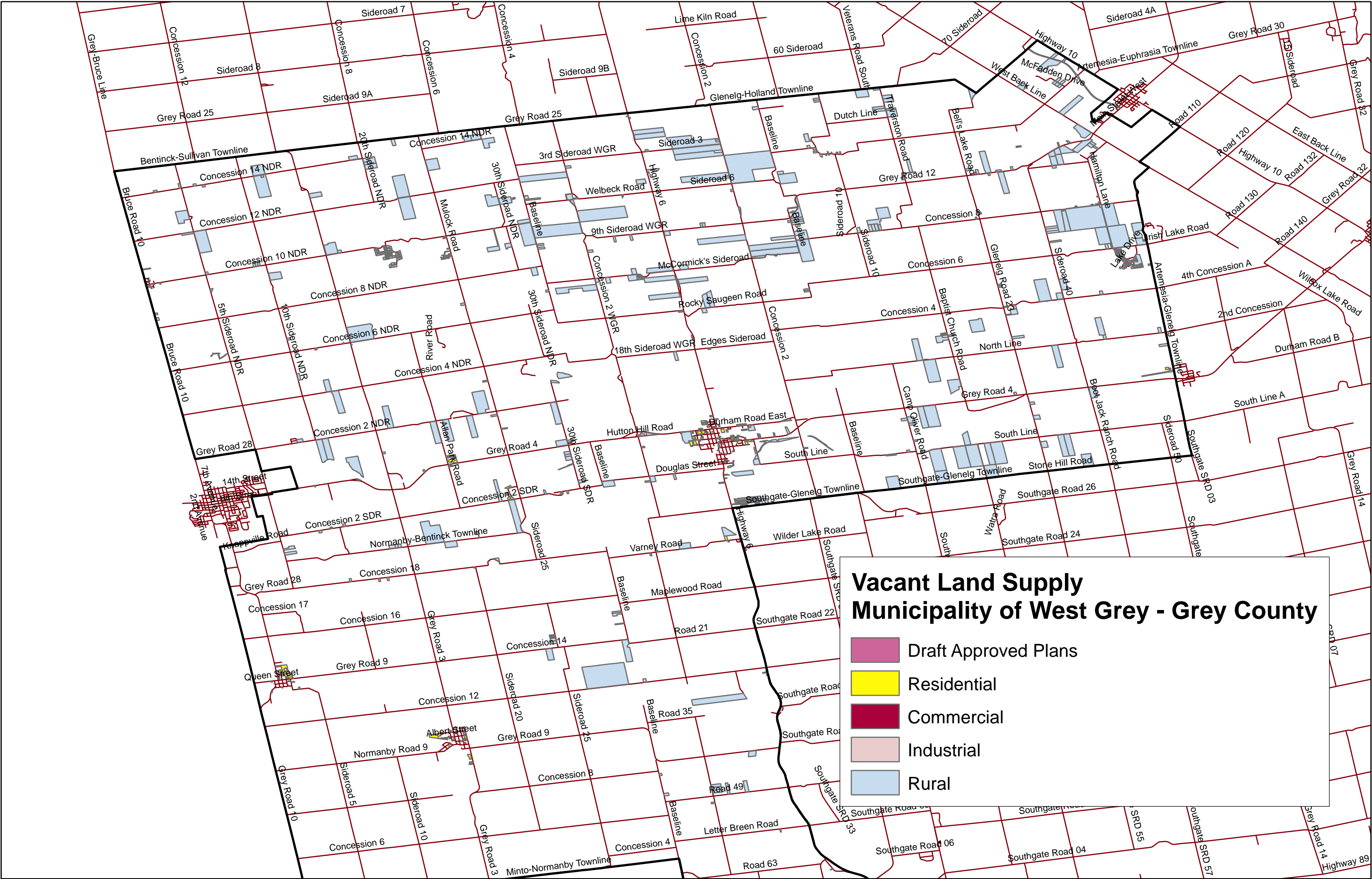
# Vacant Land Supply

## Township of Southgate - Grey County

-  Draft Approved Plans
-  Industrial
-  Commercial
-  Residential
-  Rural







### Vacant Land Supply

### Municipality of West Grey - Grey County

<div></div>	Draft Approved Plans
<div></div>	Residential
<div></div>	Commercial
<div></div>	Industrial
<div></div>	Rural