

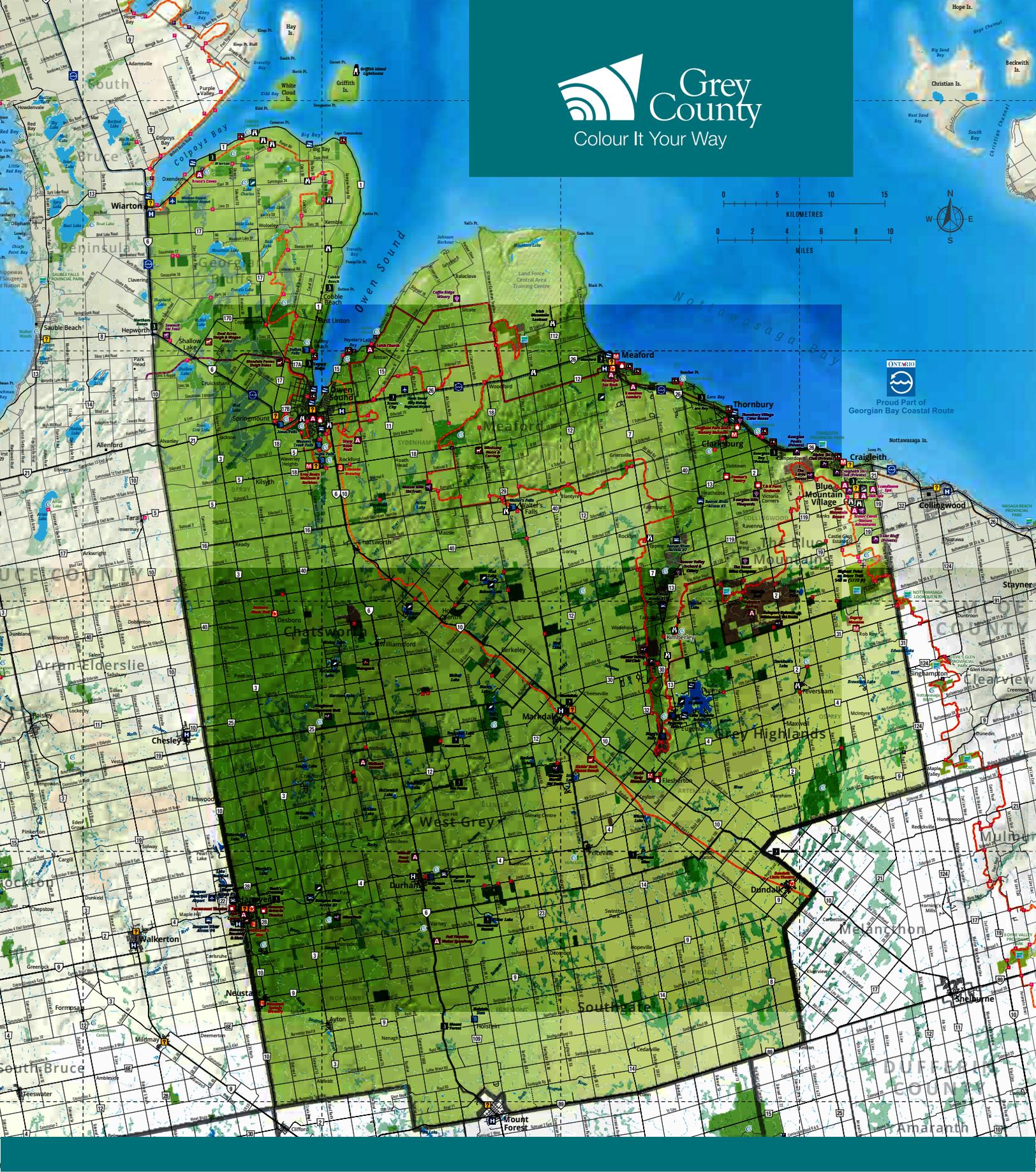


DEVELOP GREY

DISCUSSION PAPER

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Proud Part of
Georgian Bay Coastal Route

INTRODUCTION



Develop Grey focuses on our settlement areas including towns, cities, villages, and areas along the shoreline or ski hills. In order to preserve the natural elements of our county, we try to focus much of our growth into our settlement areas. To remain competitive in a global marketplace we need to ensure that we create a great place for businesses to start, grow, and prosper. We want our settlement areas, and our rural areas, to be places where people enjoy living, working, playing and visiting.

Each municipality in Grey differs in terms of economy, geography, population density, culture and society. Grey's population is spread out over a large area which can present challenges for all kinds of servicing. Efficient use of infrastructure and development is important for future planning of the County.

The County currently has several Settlement Area designations where growth is directed in order to protect our farmland and use existing infrastructure. These designations include:

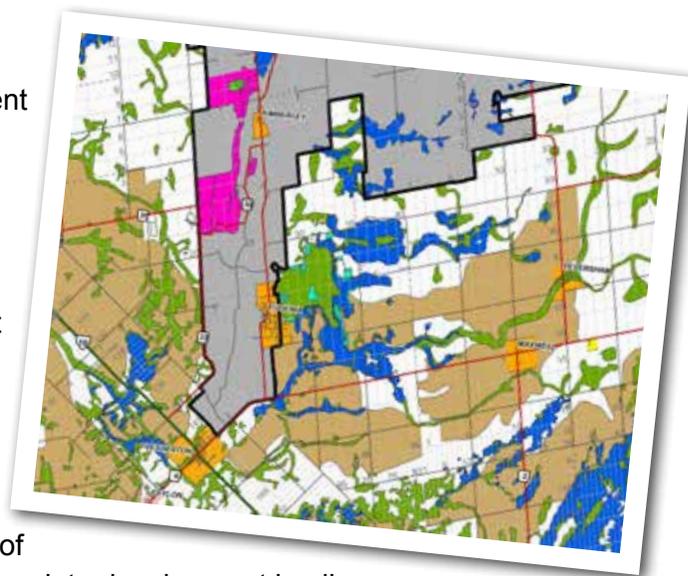
1. Settlement Areas
2. Inland Lakes and Shoreline Areas
3. Recreational Resort Areas
4. Escarpment Recreation Areas

INTRODUCTION



The settlement area designation is applied to the County's existing urban centres, towns, villages and most hamlets. It is further divided into five subtypes to distinguish between these centres:

1. Primary Settlement Areas – larger settlements with full municipal servicing, and a wide range of uses, services and amenities are intended to be the primary target for residential and non-residential growth.
2. Secondary Settlement Areas – Towns, Villages and larger Hamlets which generally have significant populations and a wide range of uses and amenities. These areas accommodate limited residential growth and new community facilities and employment uses. Some of these settlements may have partial municipal servicing.
3. Tertiary Settlement Areas – generally smaller hamlets in which development will be limited due to external, physical or policy constraints.
4. Inland Lakes and Shoreline Designation – applies to areas of concentrated development around inland lakes and the Georgian Bay Shoreline.
5. Recreational Resort Area – applies to areas within the Town of The Blue Mountains and the Municipality of Grey Highlands which exhibit a mix of seasonal and permanent residential and recreational growth on full municipal services. While this development is fully serviced, it does not contain the same range of uses as a traditional urban centre or Primary Settlement Area and is focused on a recreational component as its basis for development.
6. Escarpment Recreation Area – applies to the Escarpment Recreation Areas of the Niagara Escarpment Plan. The Escarpment Recreation Area designation, in addition to the designated Settlement Areas, will generally be the focus of growth within the County.



Settlement areas in Grey County are the focus of urban growth and are meant to encourage appropriate development in all municipalities. We define appropriate development as development that does not negatively impact our natural resources and is compatible with surrounding land uses.

INTRODUCTION



Because the County has a vast geography, including nine different municipalities, the County Official Plan provides general policies within the settlement areas. Within the current Official Plan, the County generally defers detailed development standards within Settlement Areas to local official plans and/or secondary plans.

Based on the comments received, we've broken this topic into four sub-theme areas:

1. Economic Development
2. Employment
3. Downtowns
4. Growth

Using the talents of university students and consultants, we have completed a number of background studies that touch on some of these sub-theme areas. The Province has also recently updated some of their guidelines, which will be useful in creating new County Official Plan policies. Key documents to consider under Develop Grey are the:

1. [Provincial Policy Statement 2014](#)
2. [Planning Act Changes 2015](#)
3. [2016 Grey County Census Profile](#)
4. [Grey County Tourism Destination Development Action Plan 2016](#)
5. [Community Foundation Grey Bruce Vital Signs 2016](#)
6. [Grey County Development Charges Background Study 2016](#)
7. [Updated Development Charges New By-laws and Rates](#)
8. [Grey County's Corporate Strategic Plan](#)
9. [Grey County's Growth Management Study](#)
10. [Grey County's Economic Development Strategy](#)
11. [Grey County Age Friendly Planning](#)
12. [Grey County On-Farm Business Study 2015](#)
13. [Grey County Local Agri-Food Strategy 2017](#)
14. [Guidelines on Permitted Uses in Ontario's Prime Agricultural Areas 2016](#)
15. [Employer One Survey Local Lens on Grey County Fact Sheet](#)
16. [Understanding the Skills Gap in Grey County Fact Sheet](#)
17. [Healthy Communities Toolkit](#)
18. [Spruce the Bruce](#)



ECONOMIC DEVELOPMENT

Even though economic development is intertwined in all of the Recolour Grey themes, it is more of a focus for Develop Grey. Economic development is a diverse and important topic that encompasses many different elements and this needs to be carried forward throughout the County Official Plan review process.

In previous years, the County has struggled with the Official Plan and creating policies that support economic development because the Official Plan itself cannot force development or create job opportunities. The Official Plan can however, have a positive attitude towards sustainable development and ensure there are sufficient lands available for development opportunities. Development within the above mentioned settlement areas are as important to the residents of Grey as it would be to any larger urban municipality. As long as land use compatibility is maintained and natural resources and the environment are protected, development consistent with the Provincial Policy Statement is to be promoted and encouraged in all municipalities.

ECONOMIC DEVELOPMENT



Figure 1 provides a visual from 2016 on the make-up of Grey County's industries.

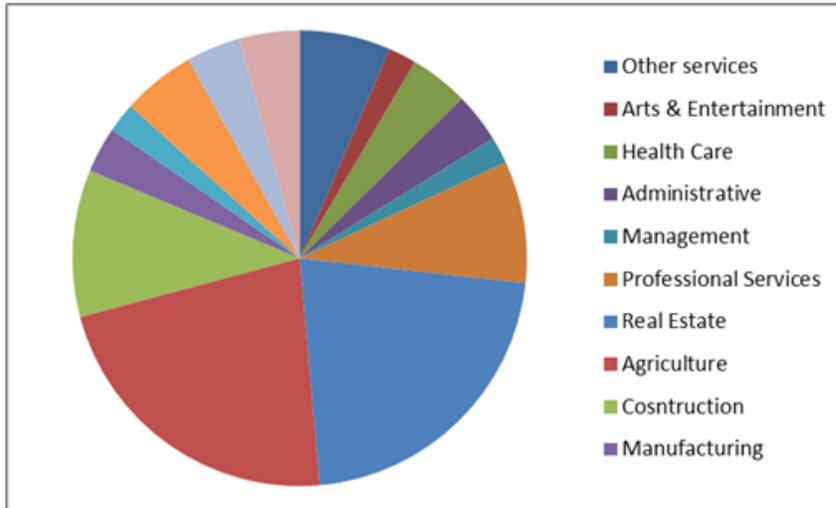


Figure 1: Business Industries June 2016 (Source Grey Community Profile / Business Register)

These industries can be broken into six key sectors (see figure 2). Though the 2015 report did not show a strong leader; the new census revealed the Agricultural industry has increased within the last year. A further in-depth analysis of Agriculture has been completed within the Cultivate Grey Discussion Paper.

These two figures can help guide Official Plan policies to ensure readily available lands are vacant or can be developed to ensure the continued success of industries, and encourage new industries in the area.

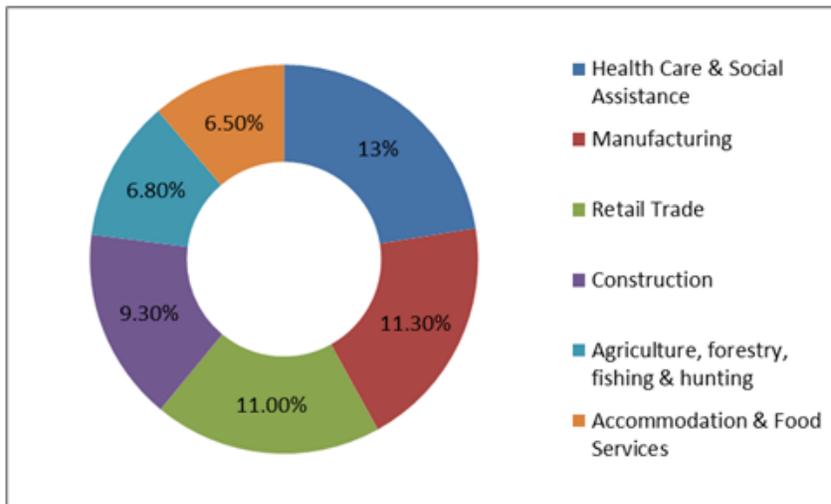


Figure 2 Business Sectors



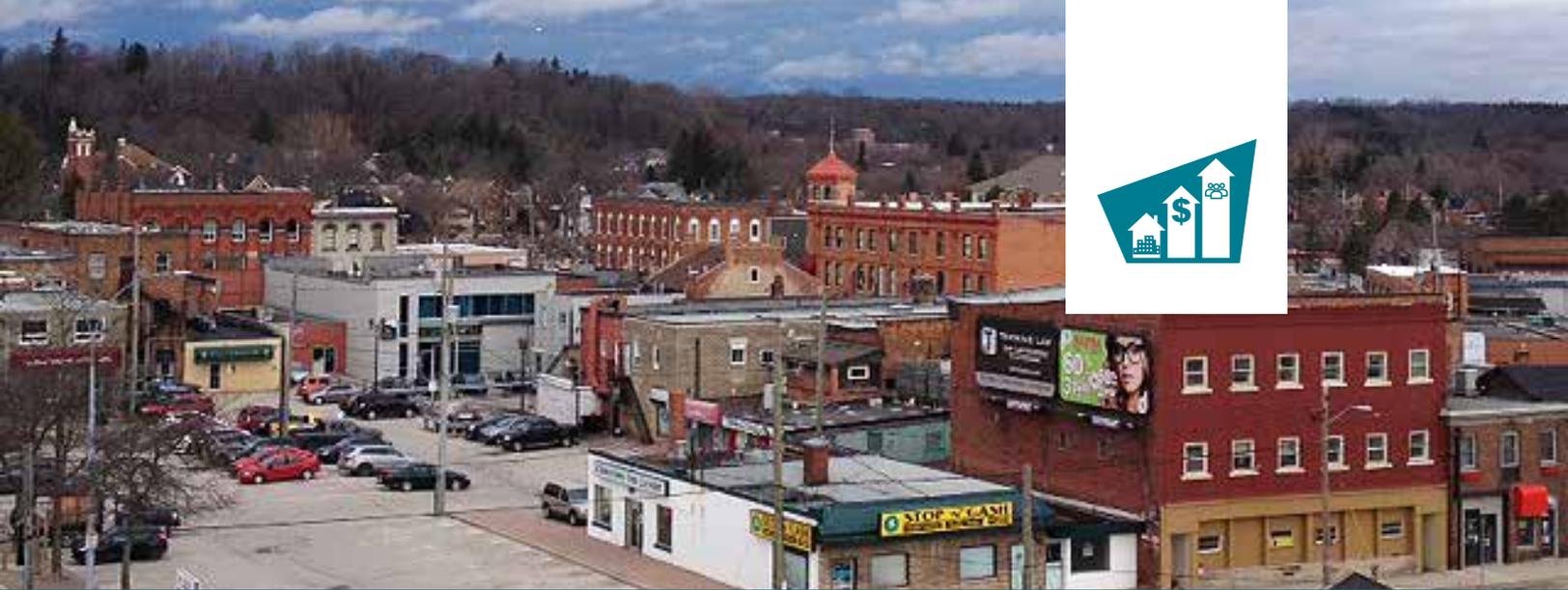
ECONOMIC DEVELOPMENT

Grey County has a diverse economy with strengths in several sectors including manufacturing, agriculture and tourism. Tourism is a broad, multi-sector industry based around the attraction of people to a specific area. Tourism is a major contributor to the County's economy, however this topic is discussed further within the Natural Grey Discussion Paper.

Over the past decade, the County experienced limited population growth and a small decline in employment opportunities (Hemson, 2015). Combined with the aging population, out-migration of youth and the loss of local employment opportunities, the County's long-term economic health is affected (Hemson, 2015). That said, the migration of older adults to the area creates opportunities for growth in Grey's recreation and retirement-oriented sectors (Hemson, 2015). Most recently and since the Growth Management Study and the 2016 Census have been completed, further growth within the area has been experienced.

With this in mind, Grey County has adopted a Corporate Strategic Plan that involves being economically ready. The goal is to enhance Grey County's economy by becoming investment ready and promoting Grey's exceptional economic assets and opportunities.

As previously mentioned the County Official Plan cannot create more employment opportunities or ensure more industries move to the area. We can however ensure we are investment ready and ready for growth. Therefore, we are hoping to adopt policies and programs that will help support business retention and expansion and the continuation of development in small business among the key sectors such as agriculture, manufacturing and tourism.



ECONOMIC DEVELOPMENT

Throughout the Recolour Grey consultation process we heard from many people that we need to attract more businesses and industries to the area. This was also somewhat seen with the Growth Management Study completed by Hemson Consulting. Within the Growth Management Study it was noted there may be a lack of shovel-ready employment lands in some municipalities. In this case, the County is hopeful to create policies that will promote development of shovel-ready employment lands. This will mean working with local municipalities and other stakeholders, such as the County's and the Municipalities' Economic Development Departments, to ensure we have the appropriate spaces for potential business opportunities.

Throughout the public consultation process, we heard that there is a lack of employment opportunities within the County. However, there are more employment opportunities available than what is realized.

Moving forward, it will be important that the Economic Development Department is involved in showcasing the opportunities in the area available for youth. Sometimes the perception that there are no jobs or opportunities doesn't match reality. In fact, employers are actively looking for both skilled and entry level workers. The County's economic development staff are reporting some area manufacturers are purchasing machines to automate processes because of the lack of available employees. Other businesses, particularly in the tourism sector, are changing their business models to reduce the need for staff. Recent employment statistics for the agricultural sector also showed a decline. We spoke with some area farmers to learn more and their answer is simple – they can't find enough employees so they are automating.



ECONOMIC DEVELOPMENT

Unemployment in the Federal Region 580 was at 4.5% in May 2017, compared to 6.1% for the province. It's one of the lowest unemployment rates in Ontario and consistently moves between just 3 to 6%. The Four County Labour Market Board continues researching this issue and time and time again the number one issue facing employers is lack of skilled employees. This will be discussed further within this discussion paper.

Comments from the public and from the consultant of the Growth Management Study can be offset by the County's Economic Development Strategy and the goal to provide open and transparent communication, real collaboration and true partnerships. Grey County, together with municipal and community partners, will be fully engaged and will work together to continually create a positive environment where businesses and investors have the information, resources and support needed to succeed.

The County's Economic Development Strategy, *Made in Grey* is another document that needs to be considered when updating the County's Official Plan. This strategy builds upon the County's core strengths. The main focus of the document is primarily on the premise that people and process will lead to economic development success. The Economic Development Strategy and the County Official Plan can work together to ensure that all policies and plans target specific activities where the County can have the biggest impact on creating a business-friendly and investment-ready environment. Furthermore, the Economic Development Strategy is meant to promote the infrastructure, shovel-ready employment lands, buildings and transportation networks. They are key components to ensuring that Grey County and its municipal partners have the physical assets ready to allow existing businesses to prosper and to make the County an attractive community for private and public sector investment.



ECONOMIC DEVELOPMENT

Other discussions within the Economic Development Strategy included On-farm Diversified Uses that are becoming increasingly prominent, especially within the Southern portions of the County. Agriculture, farms and local food (including farm and non-farm related industrial and commercial activities) are important components to the County's economy. Supporting these types of business activities is an important step to growing and sustaining Grey's overall economy. It will be important to work closely with our Economic Development staff and to consider the Local Agri-Food Strategy 2017 moving forward.

There were also several comments that mentioned Grey County should become a 'Foodie Community'. This sort of branding is perceived to boost tourism in the area, and the local economy. In order to examine policies that will support the Local Food movement, the County must use the Provincial Policy Statement (PPS) and the Guideline on Permitted Uses in Ontario's Prime Agricultural Areas for ways in which to support this type of economy. On-farm Diversified Uses and details about a 'foodie community' have been further explored within the Cultivate Grey Discussion Paper. Other new types of development and entrepreneurial operations are also popping up all over the County. This is expected to keep increasing with the promotion and establishment of fibre optics throughout the whole County with the implementation of SouthWestern Integrated Fibre Technology (SWIFT) Network. Broadband (SWIFT) is further discussed within the Move Grey Discussion Paper.



ECONOMIC DEVELOPMENT

Another key topic we heard from the community is the importance of addressing issues such as youth employment and skills development. This topic is covered within the County's Strategic Plan and although the County's Official Plan cannot force this to occur, we can help create policies that will encourage youth retention and skills development. It will be important to continue working closely with county and municipal economic development officers, and local businesses and schools, to create an action plan and implementation plan to address the priority recommendations of the 2014 Skills Gap Report and EmployerOne Survey (2015, 2016, 2017).

The aging population, out-migration of youth and loss of local industries are affecting long-term growth and economic prospects in the County. However, this does provide an opportunity for growth in the recreation and retirement-oriented markets.



SUB-THEME: DEVELOPMENT CHARGES

Throughout our public engagement sessions, reducing or waiving development charges and fees was brought up as a way the County could help promote development. For example, reducing or waiving development charges for a developer who is building affordable homes could help increase affordable housing in our community. The County has recently completed a Development Charges Study. From this study it was determined that the County needs to continue levying development charges to fund capital projects throughout Grey. The concept is that growth should pay for growth related costs (ie. subdivision developments should pay for their own road extensions) so that these costs are not paid through property taxes.

The most significant change in the County's development charge rates is that the residential charge is no longer to be levied based on the size (gross floor area) of the unit. Under the new rate structure, the different rates apply according to the type of residential development (single and semi-detached, rows and other multiples and apartments). However, in order to assist with providing more affordable housing in Grey County, the new development charges "additional dwelling" clauses have been revised in the by-laws to clarify that additional units can be added either within or attached to an existing dwelling without a development charge.



EMPLOYMENT

Grey County is a family of nine distinctive municipalities. Grey has a stable resident population of more than 93,000 (2016) and a workforce of 52,600 people. As previously mentioned, Grey County has a diverse economy with strengths in several sectors including agriculture, manufacturing, health care and tourism. The Corporation of the County of Grey employs around 930 people (although constantly changing) and is dedicated to managed, sustainable growth while also offering agricultural and rural simplicity and big city activities.

The majority of employment is directed towards settlement areas where there are full services; however, in recent years more employment opportunities have opened up within our Rural and Agricultural designations with small scale on-farm businesses, agri-tourism and diversified farm uses. Other designations that have employment opportunities are the Space Extensive Industrial and Space Extensive Commercial designations.



EMPLOYMENT

The permitted uses within the Space Extensive Industrial Designation include:

- Fuel Distribution
- Agricultural bulk sales establishments
- Warehousing
- Transport terminal
- Dry manufacturing plant, including assembly, repair and storage
- Equipment sales and rental
- Public garage or body shop
- Farm machinery sales and service
- Agricultural produce or livestock terminal
- Feed mill or grain elevator
- Sawmill and
- Wholesaling

The permitted uses within the Space Extensive Commercial Designation include:

- Building supply outlet
- Horticultural nurseries
- Automobile sales and services
- Recreational vehicle sales and services



EMPLOYMENT

County planning staff have difficulty with planning for these areas, especially within the area of the Sunset Strip in Owen Sound and north of Mount Forest along Highway 6. These areas are not necessarily settlement areas and/or rural, therefore they become hard to plan. Generally within these areas there is limited servicing and only dry uses are permitted. County staff will have to consider the one-off space extensive commercial and industrial designations, which aren't as much of a concern; however the same policies apply to the designation throughout the County.

Currently the Space Extensive Commercial designation on the west end of the City of Owen Sound is based on the Urban Area designation of the Niagara Escarpment Plan. The objective of the Urban Area designation is to minimize the impact and further encroachment of urban growth on the Escarpment environment. This creates another obstacle when planning for these lands.

It will be important to consider the future use of these lands while moving forward in the Recolour Grey process, and the current permitted uses. Now is the opportunity to create policies that work for these lands throughout the County, or look at the current permitted uses in the area, and what has been permitted recently to determine a new designation for the areas along the Sunset Strip and the area north of Mount Forest.

During our public engagement sessions there were concerns raised about the availability of employment opportunities and attracting employers to the area. This theme goes hand in hand with economic development.



EMPLOYMENT

As illustrated in Table 1, the community's labour participation and employment rate are both lower than Ontario figures. The unemployment rate is also lower than the province.

CHARACTERISTICS	GREY COUNTY	ONTARIO
Total population 15 years and over by labour force activity	81885	11536559
In the labour force	52860	7647348
Employed	49407	7079476
Unemployed	3453	567872
Not in the labour force	29025	3889211
Participation rate	64.55	66.29
Employment rate	60.34	61.37
Unemployment rate	6.53	7.43

Table 1: Labour Participation

(Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2015)



EMPLOYMENT

With the recent census some of these statistics may have changed. For example, as of May, 2017 the unemployment rate was 4.5% and the employment rate was 63.1%. With demographics constantly changing within the County it will be important to monitor and strive to increase the employment rate and retain valuable workers.

The largest percentage of resident labour force (by industry) in Grey County is employed in the healthcare and social assistance industry which accounts for 13.0% of the labour force. According to the EmployerOne Survey in 2017, Grey County's workforce includes 18% seasonal or contract workers, 57% full-time, 15% under the age of 25 and 22% over the age of 55.

Within Grey County it was reported that 33% of employers thought the availability of qualified workers was excellent-good and 67% were fair-poor. This determines that there is a skills shortage within the area. The top three reasons why positions were hard to fill includes not enough applicants, lack of qualifications (education level/credentials) and lack of motivation, attitude or interpersonal abilities. Therefore, to ensure employers are satisfied with the employment field it will be important to ensure that the appropriate education and training is available for employees in all sectors. This can happen through employer/employee training, school programs or community hubs. For example, LaunchPad in Hanover has provided training to youth in numerous topics including culinary, robotics and construction. Residents of the County mentioned they would like to see more places like LaunchPad to promote further education and more hands on experience not only to our youth, but to the population as a whole.



EMPLOYMENT

Employment and employment areas are also supposed to be protected and promoted through the Provincial Policy Statement (PPS). For example, section 1.3.1 of the PPS states,

Planning authorities shall promote economic development and competitiveness by:

- a. Providing for an appropriate mix and range of employment and institutional uses to meet long-term needs
- b. Providing opportunities for diversified economic base, including maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses
- c. Encouraging compact, mixed-use development that incorporates compatible employment uses to support liveable and resilient communities
- d. Ensuring the necessary infrastructure is provided to support current and projected needs

The County Official Plan will continue to support the need for employment lands to be protected and the requirement for comprehensive reviews when employment lands are proposed to be taken out of the equation.

EMPLOYMENT



The Growth Management Study that was completed by Hemson Consulting Inc. in 2015 stated that while Grey continued to add residents and households over the two Census periods since 2011, employment in the County has been more variable. Between the years 2001 and 2006 the County added roughly 3,400 jobs, growing in total Place of Work employment by 9%. Then, the job base in Grey declined, with the County losing 900 jobs between 2006 and 2011. Similar declines in employment had occurred in many other Ontario communities, especially in those areas outside of major urban centres, due to the recent recession and the general decline in the Province's manufacturing base. Since 2011 however, employment in Ontario has been on the rise. It is very likely that total employment in Grey has now exceeded the previous 2006 peak levels. Please see Figure 3 for an update on the employment rate within Grey County (%).

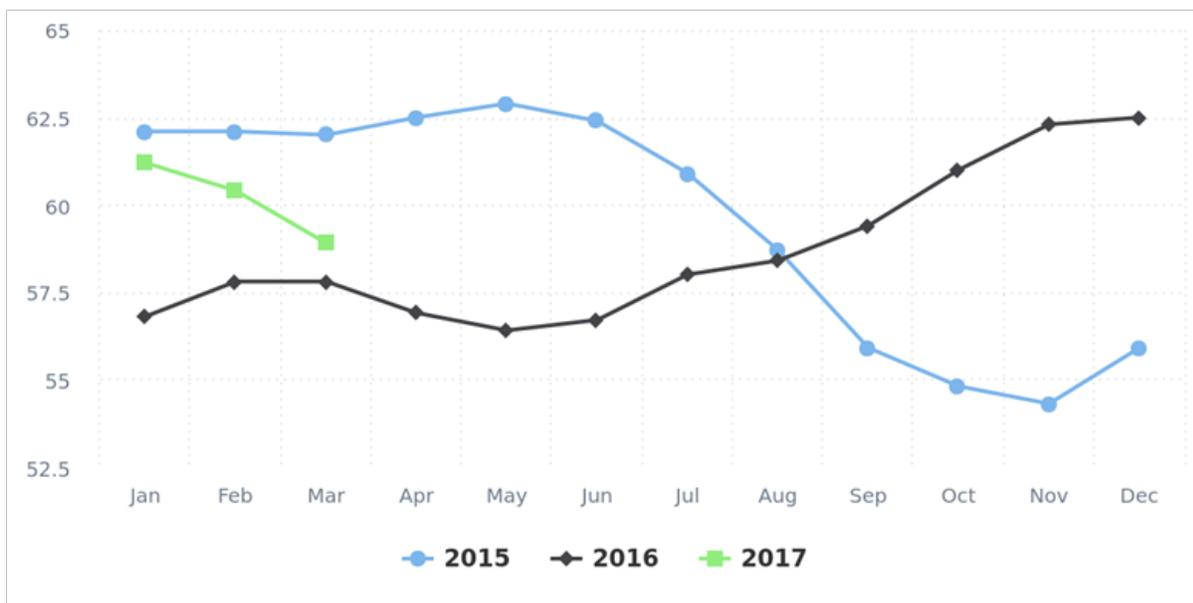


Figure 3 Employment Rate (%) Source: Labour Force Survey



EMPLOYMENT

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/Amish Communities. Primarily concentrated in the rural areas of Grey Highlands and Southgate, these businesses, include a range of on-farm commercial activities, most notable 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. These operations have been further discussed in the Cultivate Grey discussion paper. 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. It is anecdotally known that expansion of Mennonite/Amish operations in recent years have resulted in the hiring of area residents external to the Mennonite/Amish Communities.

The Growth Management Study anticipated that employment will remain relatively stable in comparison to growth in housing and population. A total of Place Work employment in Grey is expected to grow over 1,400 jobs (3%) between 2016 and 2036.

Further, the Growth Management Study noted there appears to be a significant amount of designated industrial land within the County. This land can accommodate employment-related growth, which will be the focus for traditional types of employment such as manufacturing and other industrial uses. It was also noted that marketability and timing of development will be affected by factors such as shovel-readiness and location. This is an opportunity for Grey County and local municipalities to work together on creating shovel-ready employment lands.



SUB-THEME: BROWNFIELDS

Throughout the public consultation process, it was mentioned that the County Official Plan needs to further support brownfield redevelopment. Brownfield sites are undeveloped or previously developed properties that may be contaminated. They are usually, but not exclusively, former industrial or commercial properties that may be underused, derelict or vacant. Currently, the County Official Plan states brownfield redevelopment should be considered to promote intensification within Primary Settlement Areas and Secondary Settlement Areas. Brownfield redevelopment can also be considered in Community Improvement Areas if they are identified by the local municipalities.

The County will continue to foster policies that promote the redevelopment of brownfields; however, it will remain the opportunity for local municipalities to consider and foster redevelopment. Some local municipalities have already started the process of redeveloping brownfields, for example, the current proposed development on the waterfront within the City of Owen Sound.

SUB-THEME: EDUCATION



Over 50% of Grey County residents have a postsecondary certificate, diploma or degree. The percentage of people with a College, CEGEP or other non-university certificate or diploma is slightly higher than the Ontario average.

CHARACTERISTIC	GREY COUNTY	GREY %
Total population 25 to 64 years by highest certificate, diploma or degree	47467	
No certificate, diploma or degree	7000	14.7
Certificate, diploma or degree	40497	85.3
High school certificate or equivalent	14224	29.9
Postsecondary certificate, diploma, or degree	26274	55.3
Apprenticeship or trades certificate or diploma	5235	11.0
College, CEGEP or other non-university certificate or diploma	12435	23.2
University certificate, diploma or degree	8604	18.1
University certificate or diploma below bachelor level	1242	2.6
University certificate or degree	7361	15.5
Bachelor's degree	4708	9.9
University certificate or diploma above bachelor level	2654	5.6

Table 2: Education Attainment, 2015 (source: McSweeney & Associates from Manifold Data Mining Inc. Superdemogra[hocs 2015]).



SUB-THEME: EDUCATION

The public would like more opportunities to get a post-secondary education locally and for Georgian College to partner with a University to offer a broader range of post-secondary education. Though this cannot be achieved specifically through our Official Plan review, opportunities can be discussed through economic development.

In the Age Friendly Study completed by students from the University of Guelph, it was noted the County is experiencing a large out-migration of people in their 20-30's due to education and employment purposes. It will be important for Grey County to showcase the opportunities that are available within the area to attract this age group back when starting their careers. Showcasing opportunities will help attract this age group back and help fill the local labour shortage.

A current goal within the County Official Plan, as outlined in Section 1.5.8, is to “strengthen the role of Grey County as a desirable place to work, live, and visit by encouraging the provision of affordable, diverse and accessible housing and by promoting the provision of adequate social, recreational, cultural, health and educational services.” This goal can be strengthened by also promoting youth employment strategies.

Rural school closures was a topic that was brought up throughout the Recolour Grey process. It will be important for the County and local municipalities to ensure there are enough schools to support our communities. It will be important to continue working with schoolboards within Grey and to look at opportunities to create community hubs either within existing schools, new schools or schools that are designated to close.

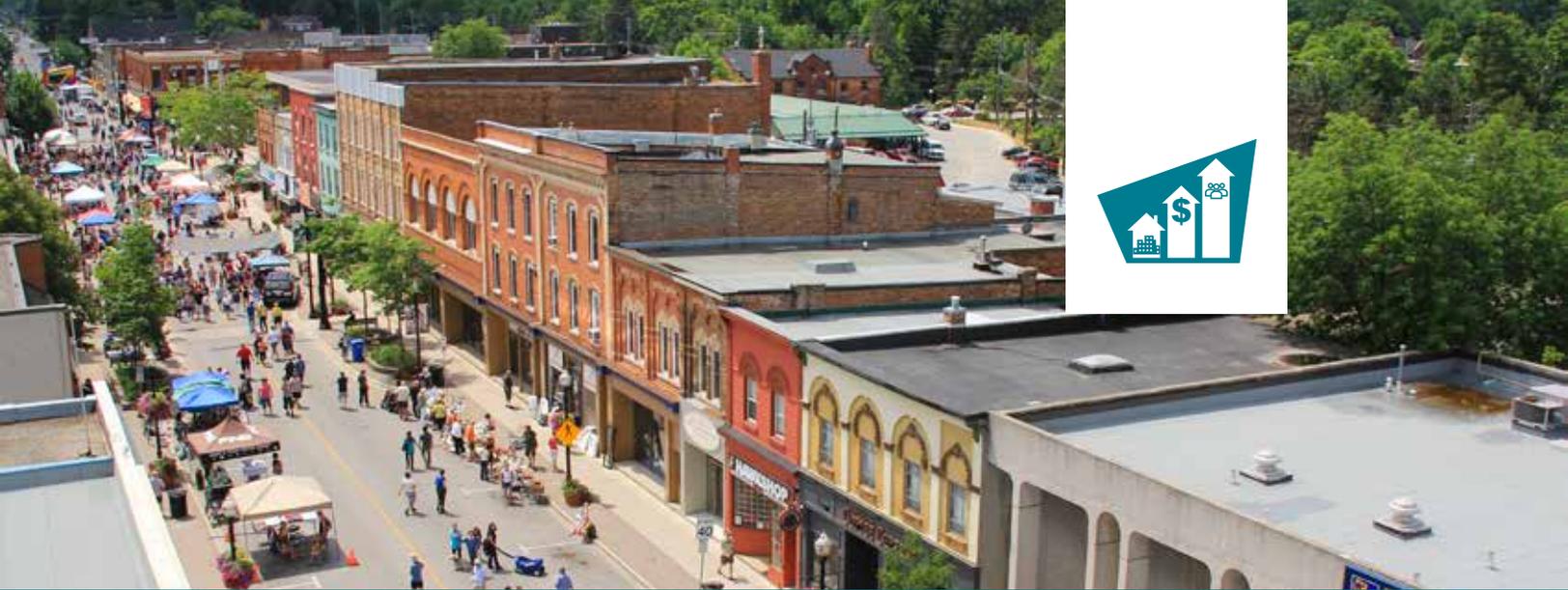


DOWNTOWNS

Throughout our public consultation we have heard comments about the need for downtown revitalization, more downtown living opportunities and for more affordable places to live and shop.

Currently within our Official Plan, Section 6.16 speaks to Community Improvement. Local municipal councils under the Planning Act may choose to designate Community Improvement Areas. A current objective under this topic is enhancing retail and downtown commercial areas in municipalities. Community Improvement Plans remain the responsibility of the local municipalities and some municipalities have completed studies on the topic. We are currently seeing some revitalization within our downtown cores. The County should continue to support Community Improvement Plans and downtown revitalization in the County Official Plan.

Because the majority of our downtown areas are within Primary Settlement Areas, detailed development standards of these areas comes from the direction of the local municipalities. Still, the County recognizes the importance and the economic vitality of the downtown core. We should continue to promote growth and revitalization within these areas.



DOWNTOWNS

As an example from a neighbouring County, Bruce County has initiated “Spruce the Bruce”. This initiative supports community efforts to simplify long-term downtown revitalization plans, bringing together stakeholders to build community capacity and assist with strategic policy and capital investment. The program gives communities the resources to develop strategies and implementation tools necessary to maintain and grow healthy commercial areas with the County and various partners. This initiative is something Grey County and our local municipalities should consider to encourage downtown revitalization across the County.

The County should continue to encourage intensification and brownfield redevelopment which can include residential development over retail and commercial. This will become more important as the County continues to grow. This can be accomplished through the County Official Plan; however, it will have to filter to local municipalities as it would need to be included in their Official Plan and Zoning By-laws. Other topics, such as affordable housing are discussed in the Live Grey Discussion Paper.



GROWTH

The County heard different comments about growth and development. Some residents were hoping to see growth and change and other residents told us they love the County the way it is and don't want to see anything change. When we dove deeper into these comments we discovered it was more about residents wanting protection of the area's natural beauty and farm land to minimize the chance of urban sprawl. Currently, the majority of growth within the County is directed to our settlement areas to use the infrastructure that is already in place and protect our farmland.

The nine local municipalities of Grey County include a range of primary, secondary, and tertiary settlement areas and significant rural and agricultural lands. Each municipality is responsible for planning for growth and change at the local municipal level. This includes directing forecast growth to their designated planning areas through their own Official Plans. The distribution of growth in Grey County must be consistent with direction in the Provincial Policy Statement. 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 have been placed on growth by the rural and privately serviced nature of the community, while most future development will be directed to serviced settlement areas. It will be important to update intensification targets based on the recommendations from the 2015 Growth Management Study.



GROWTH

The Growth Management Study needs to be considered in the Official Plan review. This Study uses current statistics and trends to predict what the County's residential growth and employment will look like 25 years from now. This study is valuable for ensuring lands are designated to meet the County's long-term needs. The forecast scenarios were prepared based on varying assumptions about future levels of in-migration.

According to the 2016 Census Data, the County has grown by 1.4% from 2011 to 2016.

MUNICIPALITY	2011	2016	PERCENTAGE CHANGE 2011 TO 2016
Chatsworth	6,437	6,630	3.0
Georgian Bluffs	10,404	10,479	0.7
Grey Highlands	9,520	9,804	3.0
Hanover	7,490	7,688	2.6
Meaford	11,100	10,991	-1.0
Owen Sound	21,688	21,341	-1.6
Southgate	7,190	7,354	2.3
The Blue Mountains	6,453	7,025	8.9
West Grey	12,286	12,518	1.9
Grey County	92,568	93,830	1.4

Table 3 Census 2016 Comparison to Census 2011



GROWTH

Growth in the County has been unevenly distributed among the municipalities in Grey. Some municipal populations declined between 2011 and 2016 and others grew. It will be important to update the County's recent growth from the 2016 Census and to monitor the growth activity being experienced in Grey in terms of population, employment and land availability.

During the most recent slower growth periods, the County's population continued to age. This trend was present across Ontario, particularly outside of major urban centres. The aging demographic trend is expected to continue. It will have important implications for planning in Grey.

When looking at the Historical Age Structure of Grey County, there is a pronounced reduction in the number of people in their 20's and 30's relative to those older and younger. This is likely the result of the combined effect of the "baby bust" generation and the continued out-migration of young adults pursuing education or employment opportunities. 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. This is something the County needs to consider planning for.

Another population trend to consider is the number of new Canadians entering the Country. Currently, most new Canadians are choosing to live in larger urban areas and not rural Ontario. However, this trend is shifting and therefore attracting new Canadians is an opportunity for growth within the County of Grey.

GROWTH



When considering population growth, the County must consider the vacant land base. The Growth Management Study noted the County has over 1,000 hectares of vacant residentially-designated lands in Grey’s designated settlement areas. The bulk of these lands are contained within Primary Settlement Areas. There is also a substantial supply of vacant lands under the Inland Lakes and Shoreline designation, Recreational Resort designation and the Escarpment Recreation designation. It is anticipated these lands will accommodate growth in residential and commercial uses, particularly related to seasonal units and recreational uses.

MUNICIPALITY	VACANT RESIDENTIAL (net hectares)	UNIT CAPACITY (at density of 20 Units per net hectare)	UNIT CAPACITY (at density of 25 units per net hectare)
Blue Mountains	158.8	3,176	n/a
Chatsworth	80.4	n/a	n/a
Georgian Bluffs	253.2	5,063	n/a
Grey Highlands	240.1	4,802	n/a
Hanover	66.7	n/a	1,666
Meaford	136.6	2,732	n/a
Owen Sound	110.6	n/a	2,765
Southgate	41.9	837	n/a
West Grey	51.9	1,039	n/a
Grey County	1,140.1	17,648	4,432

Table 4: Vacant Residential Land Supply Capacity by Local Municipality Grey County, 2014 (Hemson Consulting Ltd. Based on Municipal data provided). The densities listed in table 4 are based on the current Official Plan density targets for primary settlement areas.

Based on the vacant residential supply and the density assumptions applied, there appears to be significant unit capacity in 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. Furthermore, the capacity analysis only considers vacant designated residential lands. Additional unit capacity through intensification within existing built up areas would add to the County’s overall unit potential. Conversely, the extent servicing capacity may limit growth for some Grey communities and could reduce the unit potential.



GROWTH

When taking into consideration a range of planning policy, historic growth and recent development trends and land supply and servicing capacities, changes to settlement area boundaries are not being proposed at this time. The study did not find the need to expand the boundaries because there is sufficient land use supply. However, Grey County can consider expanding settlement area boundaries if a future comprehensive review shows a need.

According to the Growth Management Study, it is likely the growth in seasonal recreational units will occur mostly 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 highest. This type of development will be a combination of low density residential on private or partial services within the Inland Lakes and Shoreline and Escarpment Recreation designations and low to medium density development on full services in the Recreation Resort designation. Taken together, these designations comprise a vacant designated supply of over 1,000 net hectares within the County. 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.



CENSUS COMPARISON:

A review of the 2008 Growth Management Study 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. It is important to do a comparison between the projected 2016 population and the results from the 2016 Census.

YEAR	Forecast Scenario Low	Forecast Scenario Reference	Forecast Scenario High	Forecast Scenario Growth Low	Forecast Scenario Growth Reference	Forecast Scenario Growth High
2011	92,600	92,600	92,600			
2016	93,400	94,700	95,500	800	2,100	2,900
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
2036	98,600	105,400	113,400	800	2,400	4,600
2041	98,800	107,100	117,500	200	1,700	4,100

Table 5: Forecast Census Population for the County 2011-2014 by Hemson Consulting Ltd.

POPULATION AND DWELLINGS	TOTAL
Population 2016	93,830
Population 2011	92,568
Population % change, 2011-2016	1.4
Totally Private Dwellings	47,560
Population density per square Km	20.8
Land area in square Km	4,513.50

Table 6: Statistics Canada Population for Grey County (Statistics Canada, 2016 Census of Population.)

The projected population by Hemson is very similar to the actual population in 2016. At this time the County is not considering any settlement area boundary expansion until there is a demonstrated need. We are seeing a recent increase in growth since the 2016 Census was released and we will monitor this growth activity to determine how quickly these developments will build out to determine if sufficient lands will still exist for certain settlement areas.

GREY COUNTY PLANNERS ROLE IN DEVELOPING GREY



A number of factors related to Develop Grey are within the control of the County and member municipalities through our official plans and zoning by-laws. Our Plan will need to:

- Map Primary, Secondary and Tertiary Settlement Areas, as well as Inland Lakes and Shoreline, and the Recreation Resort Area.
- Provide detailed policies on permitted uses within these areas, which are consistent with the PPS.
- Promote lot creation in these areas to provide for intensification where it is appropriate.
- Promote land use patterns and densities which provide for an efficient use of land and resources.
- Support on-farm businesses and diversification within rural and agricultural areas.
- Continue to support local food and recreation/tourism initiatives.
- Balance the need for rural growth, with the desire to maintain healthy settlement areas.
- Continue to direct development to settlement areas where there are full municipal services.
- Support infrastructure development which is helpful to economic development within the County.
- Remain open to new technologies for economic and employment purposes.
- Continue to support Community Improvement areas and revitalization opportunities.
- Provide planning policies that promote an Age Friendly community.

However there are also many factors which are out of the control of County planning, including:

- Market / commodity / land prices
- Changes in technology
- Major economic and employment changes
- Out-migration and the retention of the youth demographic
- Prices of shops and resort accommodations
- Affordability of goods in local shops
- Rural school closures

DEVELOP GREY – POLICY OPTION SUMMARY



1. ECONOMIC DEVELOPMENT

- Ensure planning policies are supportive of economic development.
- Continue to have policies that support on-farm businesses and diversified uses.
- Remain open to new technologies and new ideas.
- Continue supporting infrastructure development and the implementation of broadband throughout the County.
- Continue to work with local municipalities and existing and new industries to resolve location issues and servicing issues.
- Continue promoting the expansion of opportunities for commercial and industrial uses related to specialty crop production and other farming operations as a major contributing factor to the health and prosperity of the social and economic base of the County.
- Promote the natural aspects of the County and encourage the preservation of existing recreational and tourism related activities and land use.
- Have supporting policies to promote agri-tourism and policies that promote the importance of the local food system.
- Ensure there is sufficient land designated and available to accommodate an appropriate range and mix of employment opportunities.
- Promote shovel-ready lands.
- Ensure there is adequate servicing for both residential and economic development activities.
- Identify any ‘roadblocks’ in existing policies which are causing lengthy administrative processes for new or expanding businesses.



DEVELOP GREY – POLICY OPTION SUMMARY



2. EMPLOYMENT

- It was recommended in the Growth Management Study that the County should continue to monitor on-farm small scale industrial and commercial uses 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, in particular during times of economic downturn.
- The County should promote and assist the establishment of finished or refined products from all of the County's physical natural resources including mineral aggregate, fossil fuels, metalliferous minerals, non-aggregate minerals, agriculture, forests or water to continue to create more jobs and reduce transportation impacts.
- Promote the creation of employment opportunities within settlement areas and encourage on-farm job creation.
- Continue to identify, coordinate and allocate employment projections for the lower tier municipalities.
- Consider the conversion of employment areas (i.e. manufacturing uses) for other uses (i.e. major retail uses) with the completion of a Comprehensive Review.
- Review the County's Space Extensive Commercial and Industrial policies as they relate to the Sunset Strip, the business park north of Mount Forest, and the one-off developments across the countryside.
- Continue to support the redevelopment of brownfields.
- Continue to require adequate buffering between commercial/industrial uses and any residential, open space, recreational and institutional use.



DEVELOP GREY – POLICY OPTION SUMMARY



3. DOWNTOWNS

- Continue to support downtown revitalization projects.
- Continue to implement and support policies on Community Improvement Areas, i.e. policies to enhance retail and downtown commercial areas within municipalities.
- Continue to support intensification of downtown areas.
- Encourage adding housing above commercial uses in and near downtowns.
- The County may consider policies to retain traditional downtowns and retain healthy communities.
- The County may consider policies to promote urban forests and small scale urban agriculture.
- Look into policies that make sure downtown areas are the focus for business, administration and cultural activities and remains a primary gathering place.
- Facilitate vehicular and pedestrian movement in the downtown core through improvements to roads, parking areas and pedestrian paths.
- Promote the protection of heritage buildings.
- Encourage initiatives which attempt to improve the economic viability of the downtown area.

4. GROWTH

- Revise Tables 1, 2 and 3 of the Official Plan to incorporate the updated Growth Management Study forecasts and local allocations of population, housing and employment growth to 2036 and the extended planning horizon to the same.
- At this time, there is no identified need to expand urban boundaries 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 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 was recommended in the Growth Management Study 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.
- In reviewing updates to municipal official plans, specific land supply needs by land use types could be investigated and tracked further.
- Continue to consider settlement area boundary expansions via comprehensive reviews.
- Incorporate policies to ensure the County grows in an age friendly manner.



WHAT'S NEXT?

This Develop Grey paper will be presented to County Council. Staff will then prepare draft policies to address the items highlighted above, taking into account Council's feedback, and the community conversations we've had to date. We will then have further conversations with the community in the summer and fall of 2017 to see if these policies address the needs of the community now and into the future. Following this, we will then bring the complete Official Plan document for Council to consider.