



Bruce County Growth Management Strategy (G.M.S). Council Presentation

November 2020

Study Purpose



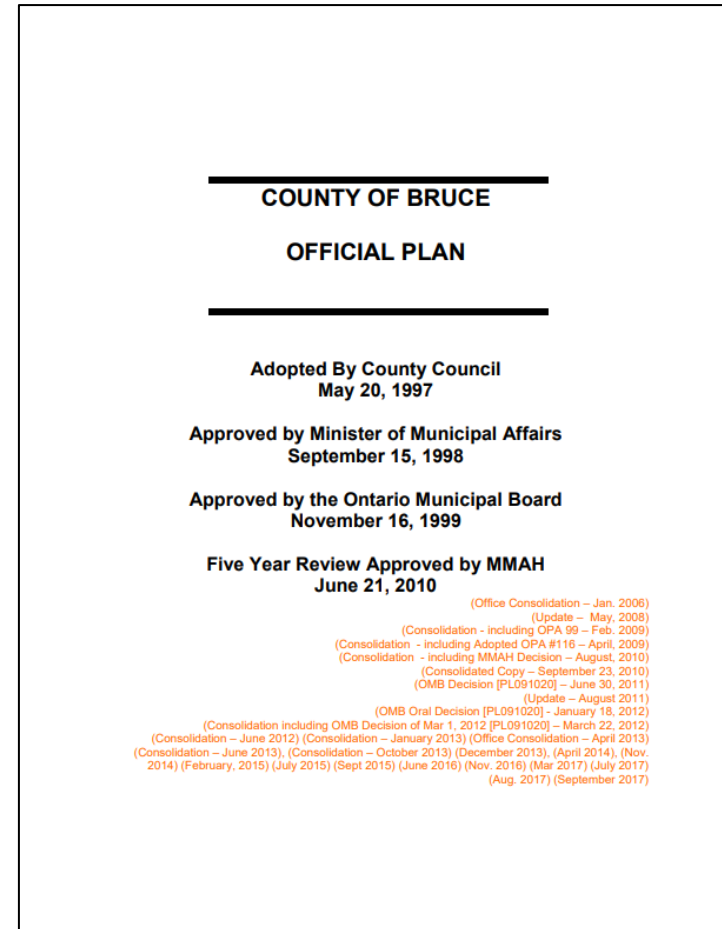
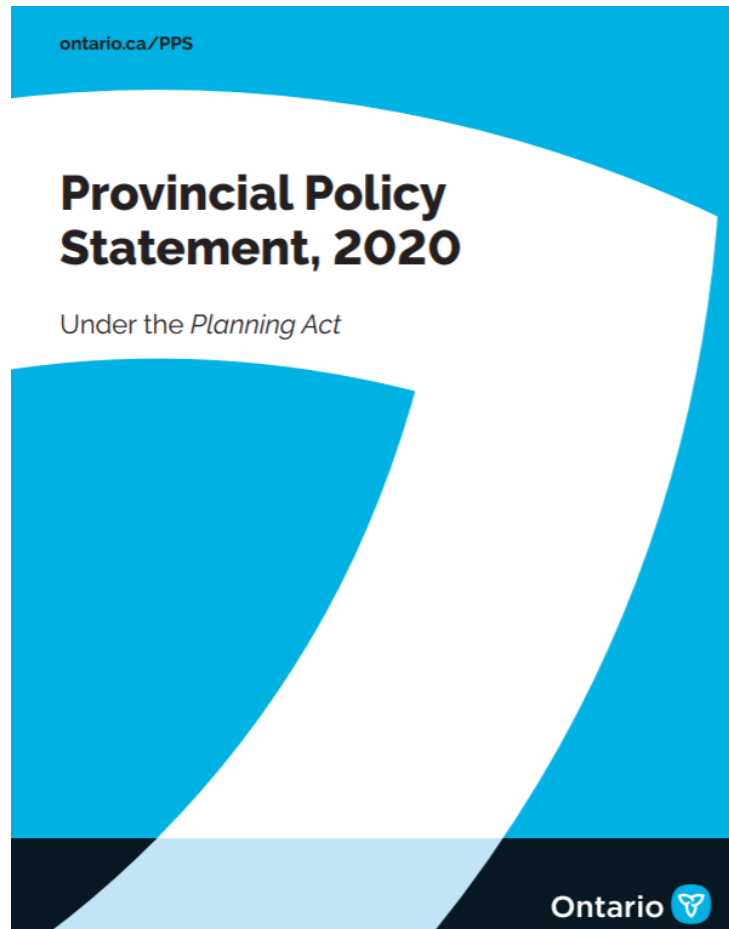
- Watson & Associates Economists Ltd. (Watson) and WSP, were retained by Bruce County to undertake a growth management strategy (G.M.S).
- This growth management strategy will inform the comprehensive review of the Bruce County Official Plan and, as such, will include an overview of the County's projected growth over the next 25 years, consistent with the Provincial Policy Statement (P.P.S.). This study will provide the following outcomes:
 - Long-Term Growth and Land Needs Analysis;
 - Public and Stakeholder Engagement; and
 - Policy and Strategic Recommendations.

Purpose of Presentation



- The purpose of this presentation is to provide Council with the preliminary findings of our technical analysis as it relates to the long-range County-wide growth scenarios. These growth scenarios are being provided to Council for their information and consideration.
- As part of this presentation, Watson will be recommending a “preferred” long-range population and employment growth scenario which will be used to inform growth allocations and urban land needs by local municipality and by Primary Urban Area to the year 2046.

Policy Context



Bruce County Growth Drivers and Disruptors

What Drives Population Growth?



Economics

Local and Regional
Economic Outlook



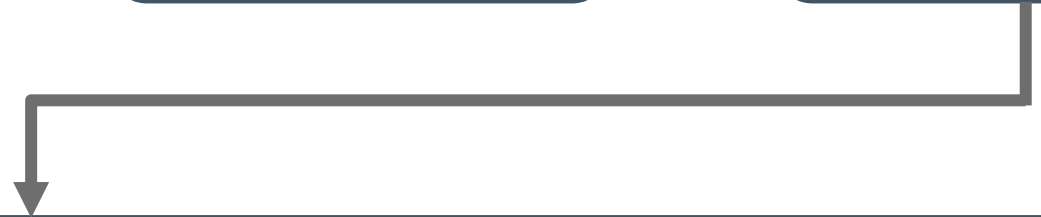
Economic Drivers of
Population and
Employment Growth by
Area



Labour Force Growth
within the Commuter
Shed



Forecast Employment
Growth by Sector



Demographics

Net Migration and
Natural Increase



Population and Housing
forecast 2016 to 2046



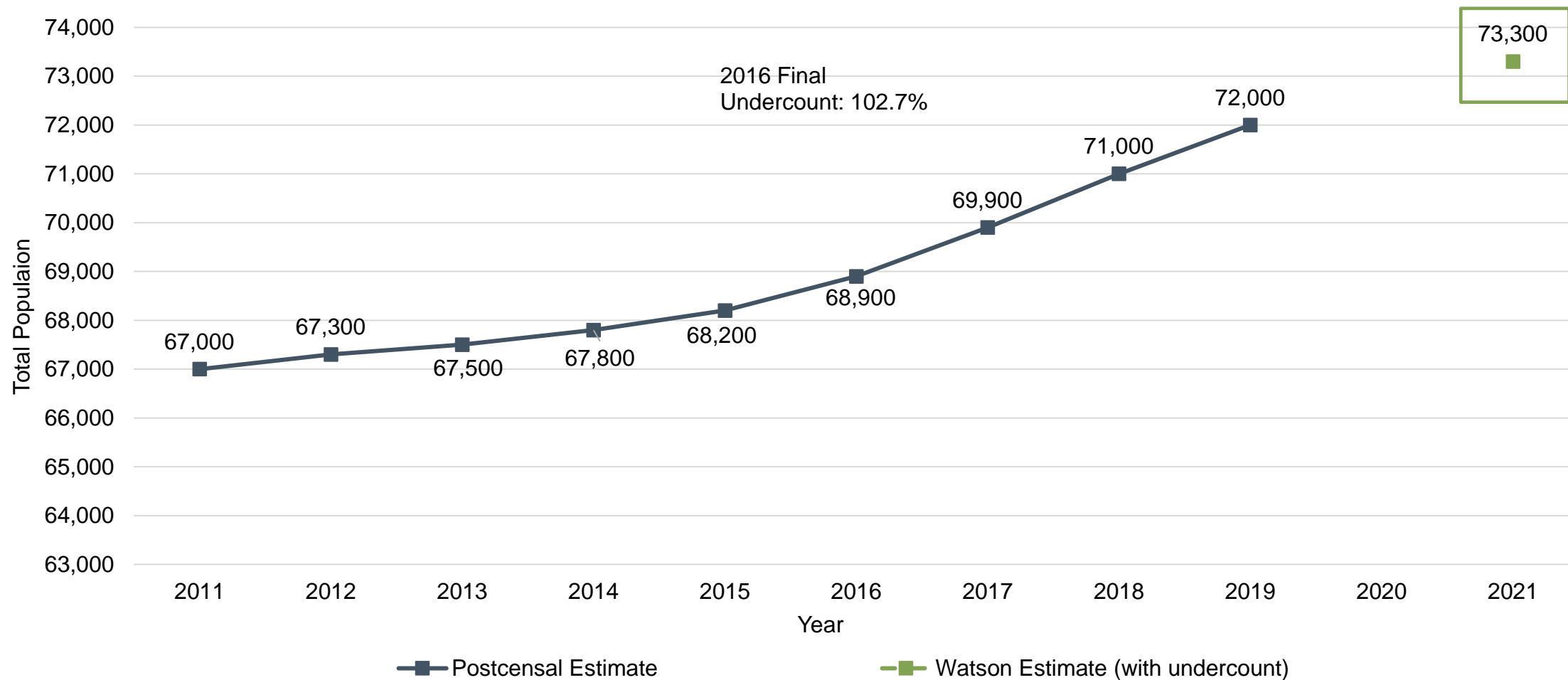
Allocation of County-
wide Growth Forecast
by Local Municipality



Allocation of Local
Municipal Forecast by
Primary Urban Area and
Remaining Rural

Bruce County Short-Term Population Forecast, 2011 to 2021

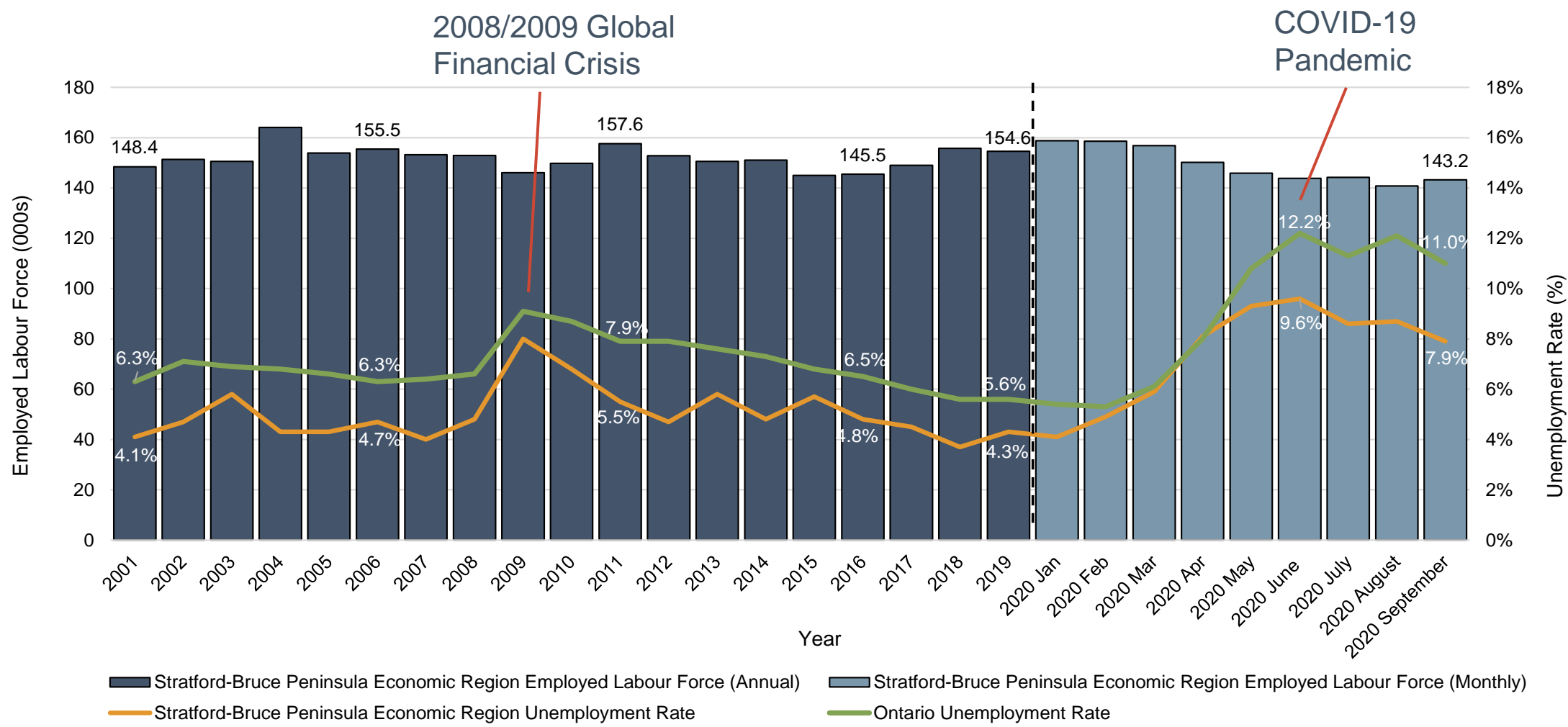
Watson & Associates Compared to Statistics Canada



Source: Population with the undercount derived from Annual Demographic Estimates: Subprovincial Area, Statistics Canada, Demography Division. Postcensal estimate has been adjusted downwards to account for Indian Reserves within the Bruce Census Division.

Bruce County Growth Drivers and Disruptors

Perth, Huron, Bruce, and Grey County Combined Labour Force Trends, 2001 to September 2020



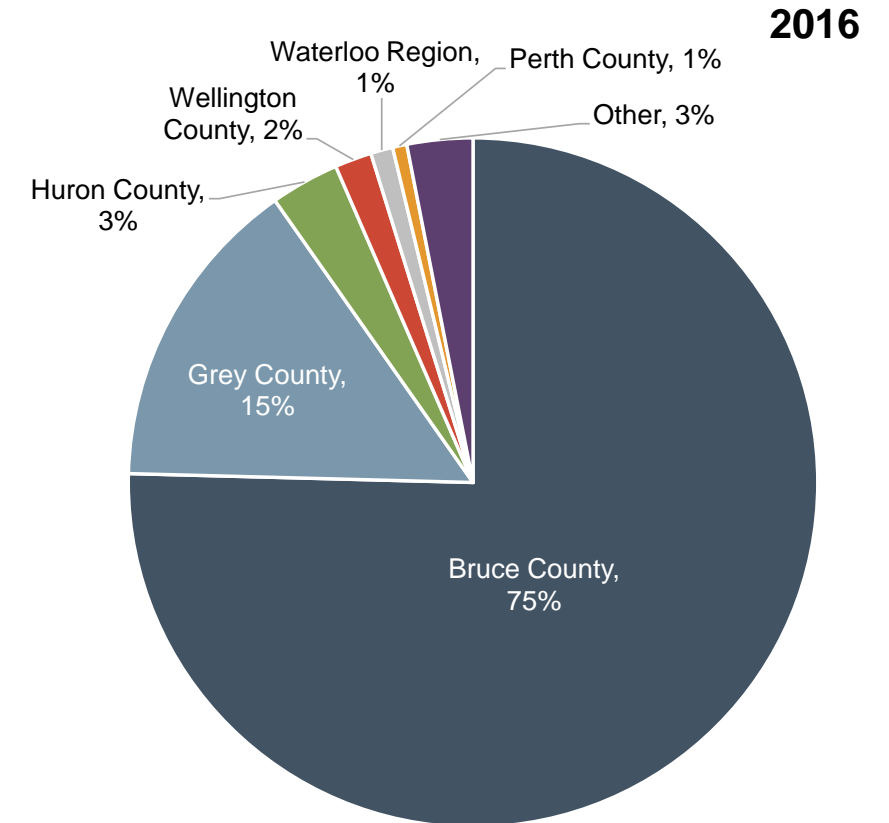
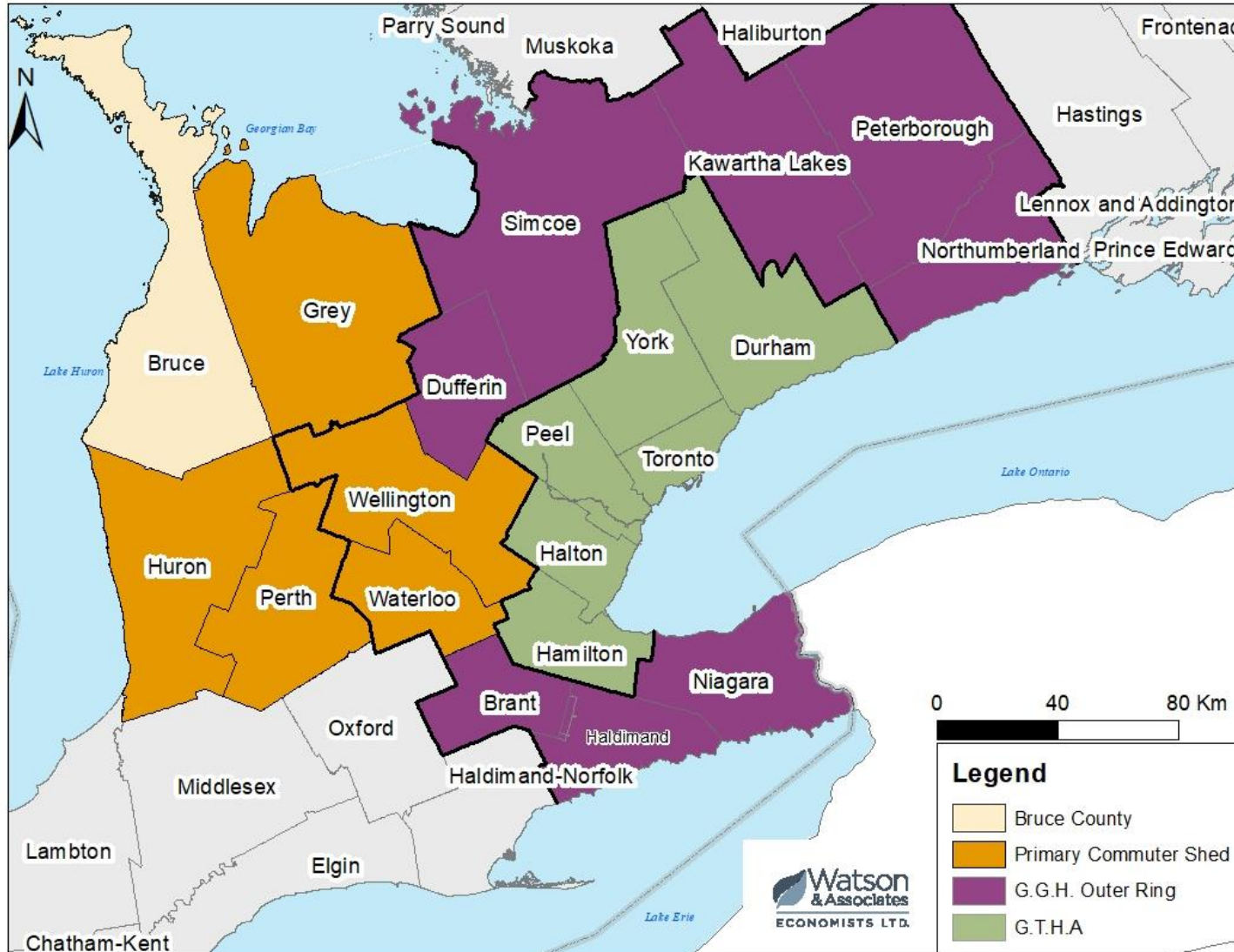
Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
Source: Statistics Canada Data Tables 14-10-0092-01, 14-10-0091-01, and 14-10-0293-02. By Watson & Associates Economists Ltd., 2020.

Bruce County Growth Drivers and Disruptors

Employment Opportunities within Bruce County Commuter Shed



Where Bruce County Residents Commute to Work



Source: Statistics Canada Commuting Flow Table (98-400-X2016391), by Watson & Associates Economists Ltd., 2020.

Bruce County Growth Drivers and Disruptors



- Regional Economic Opportunities
 - Continued focus in the utilities and manufacturing sectors
 - Emerging knowledge-based and creative class sectors
 - Continued viability of the agricultural sector
 - Future need for skilled labourers
- Population Growth of the 55+ Age Group
- Quality of Life
- Seasonal Growth Opportunities
 - The seasonal component of Bruce County's population places significant demand on housing, infrastructure, economic development and municipal services

Bruce County

Long-Term Population and Employment Forecast Scenarios,
2016 to 2046

Bruce County Forecast Permanent Population Scenarios, 2016 to 2046

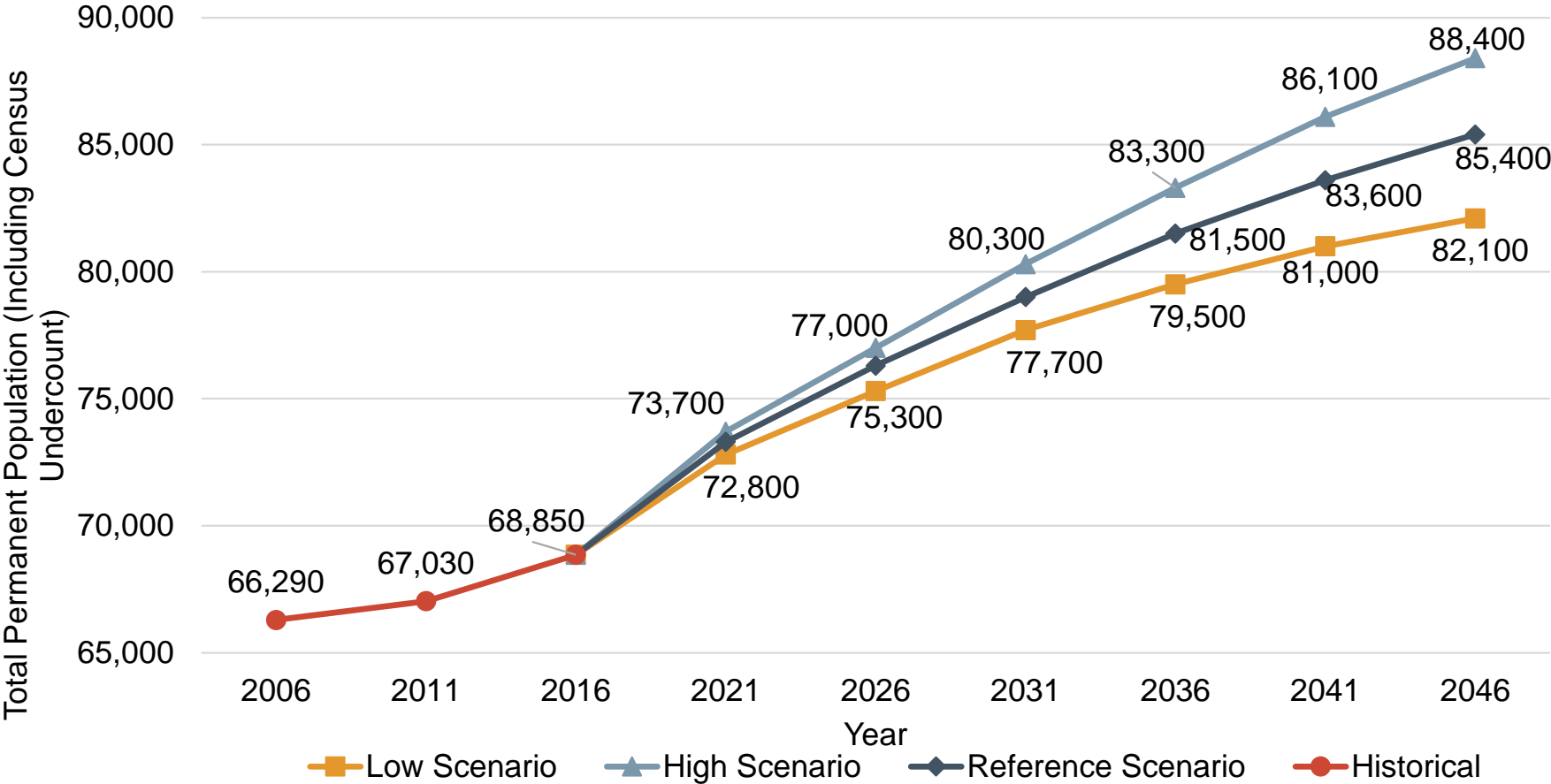


2016 to 2046 Annual Growth Rates

Low Scenario:
0.6%

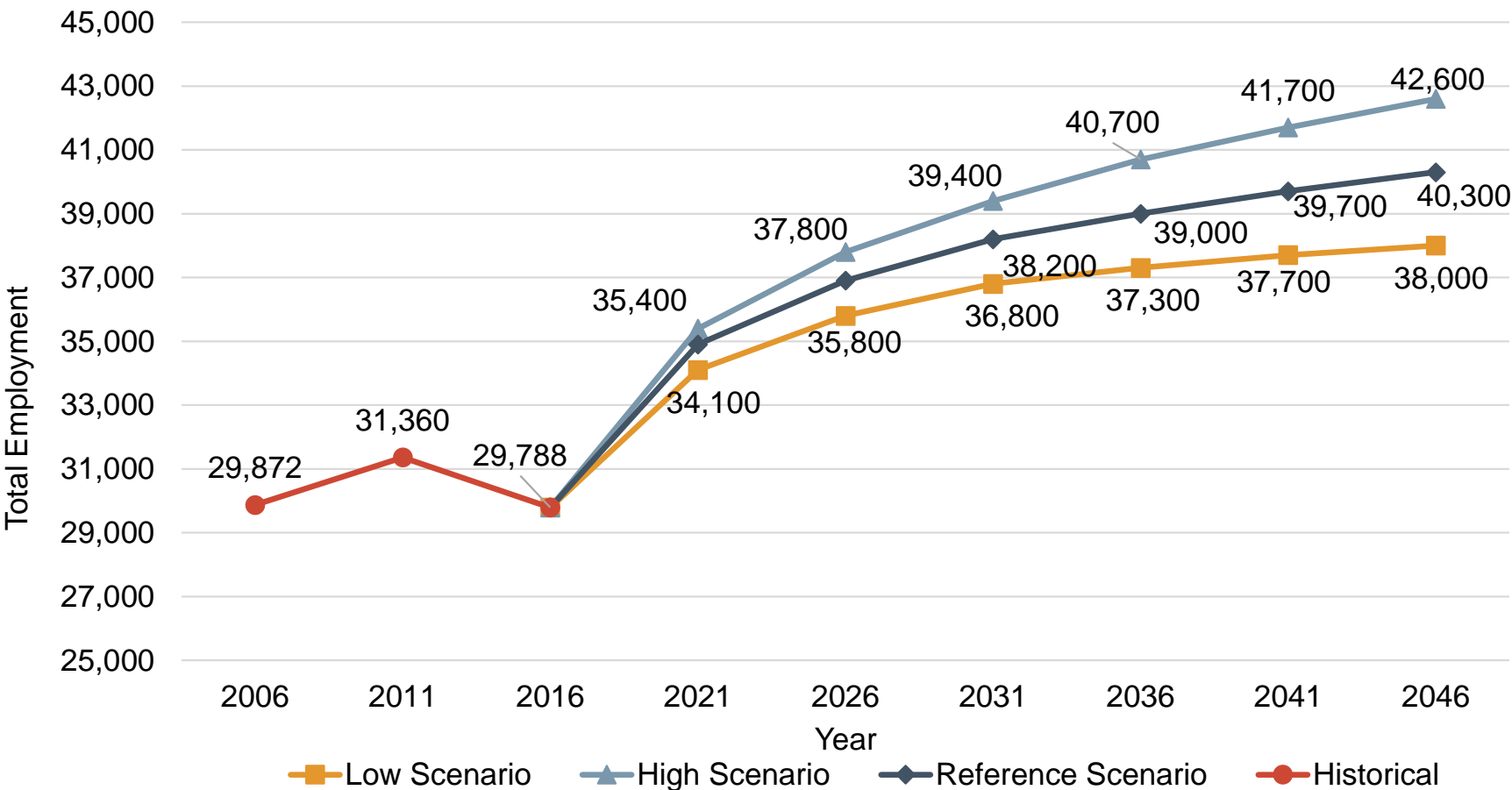
Reference Scenario:
0.7%

High Scenario:
0.8%



Source: Forecast by Watson & Associates Economists Ltd., 2020.
Note: Population includes the net Census undercount estimated at 2.65%.

Bruce County Forecast Employment Scenarios, 2016 to 2046



2016 to 2046 Annual Growth Rates

Low Scenario: **0.8%**

Reference Scenario: **1%**

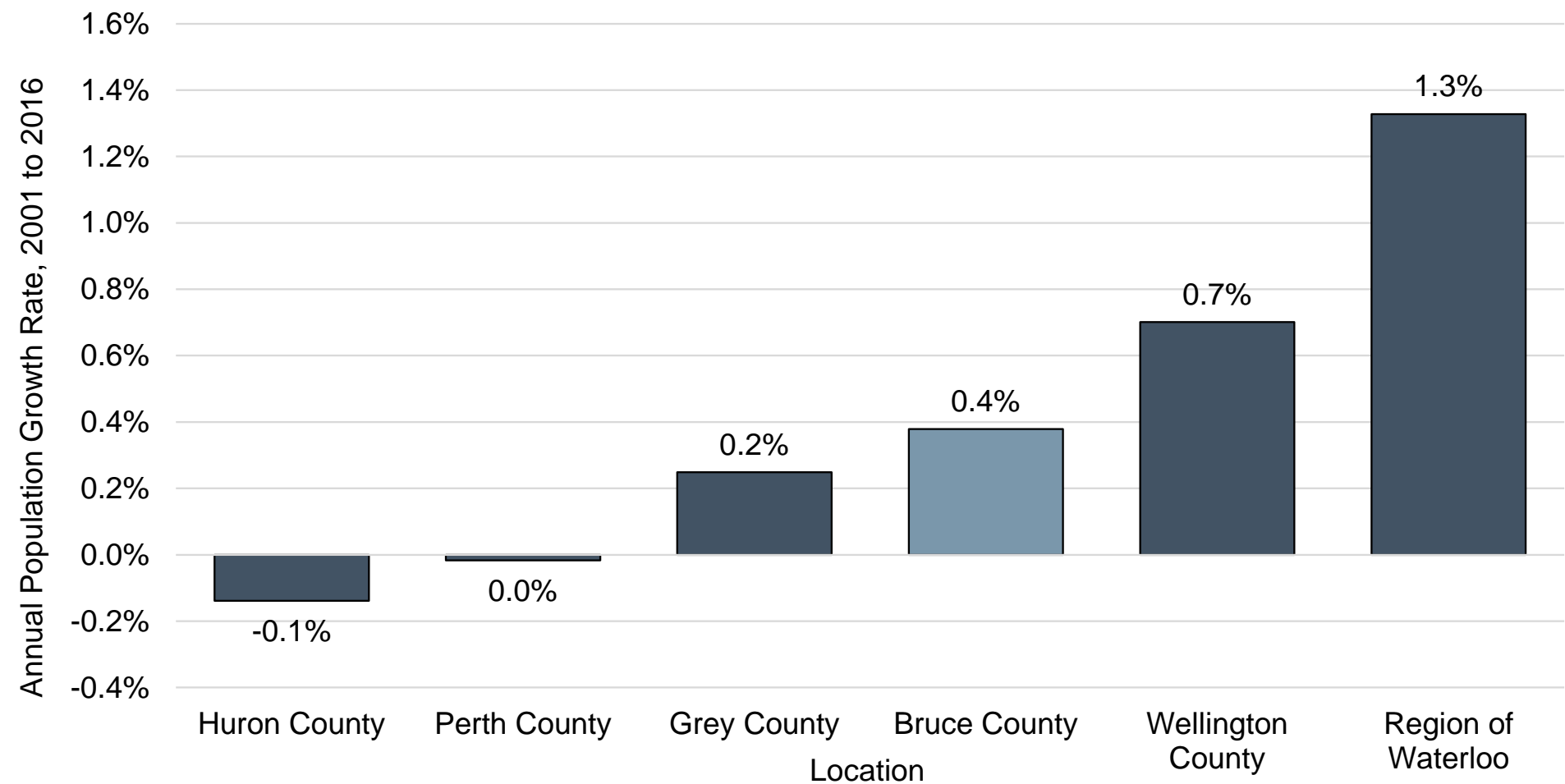
High Scenario: **1.2%**

Source: Forecast by Watson & Associates Economists Ltd., 2020.
Note: Total employment includes no fixed place of work and work at home employment.

Bruce County

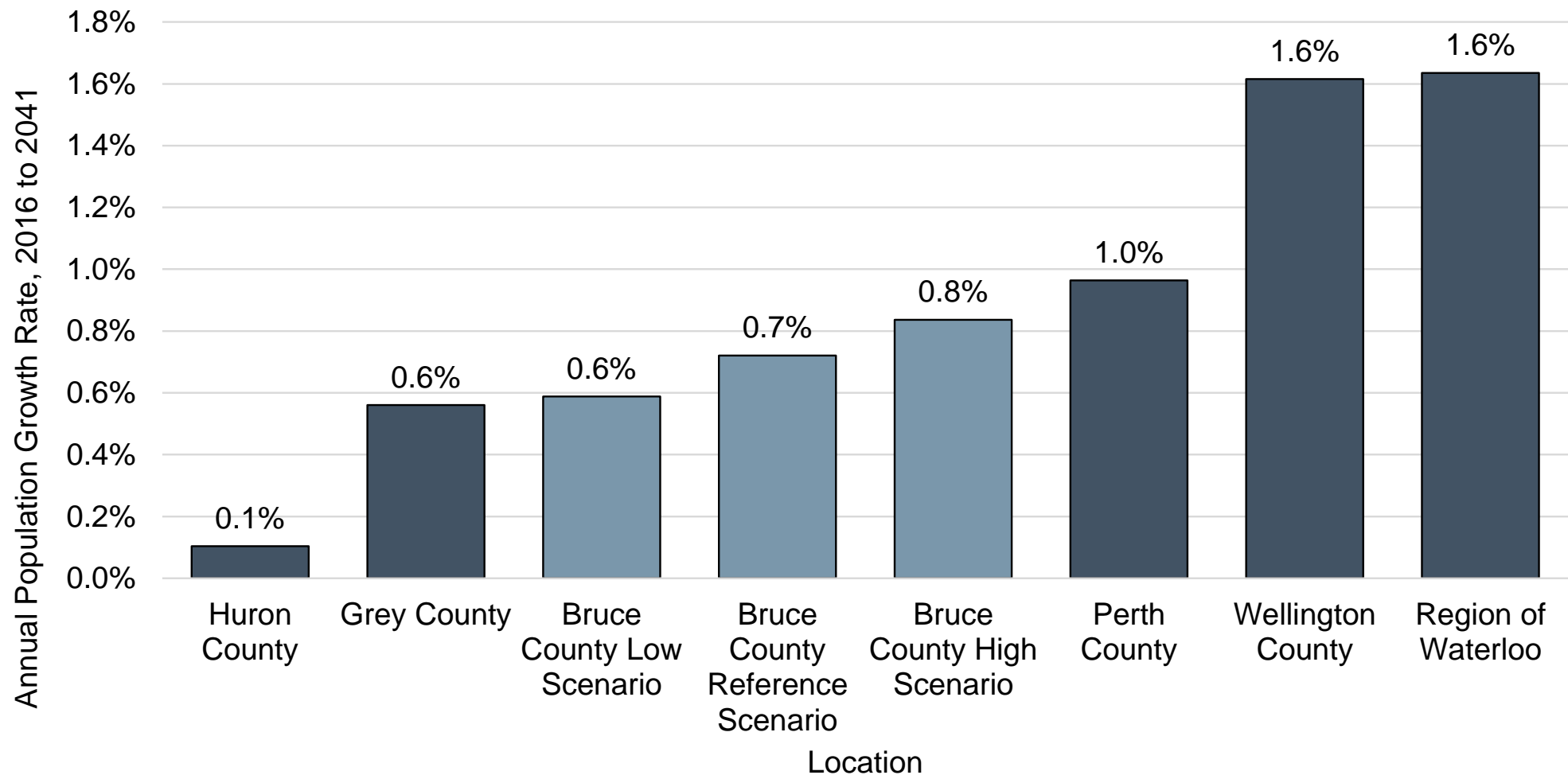
Reference Scenario Growth Evaluation

Historical Annual Population Growth Rate Comparison, 2001 to 2016



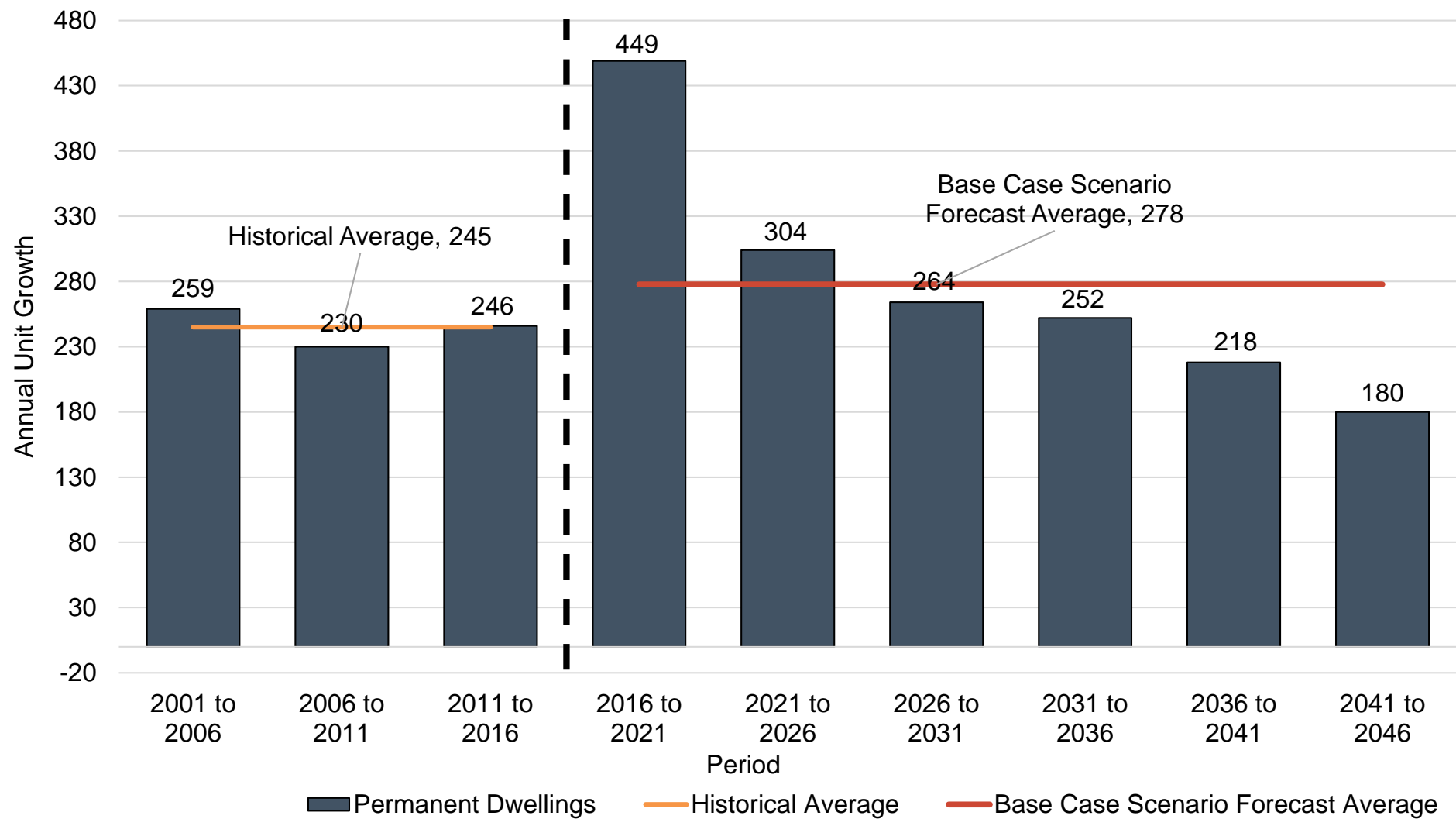
Source: Statistics Canada Census (2001 and 2016), by Watson & Associates Economists Ltd., 2020.

Annual Population Forecast Growth Rate Comparison, 2016 to 2041



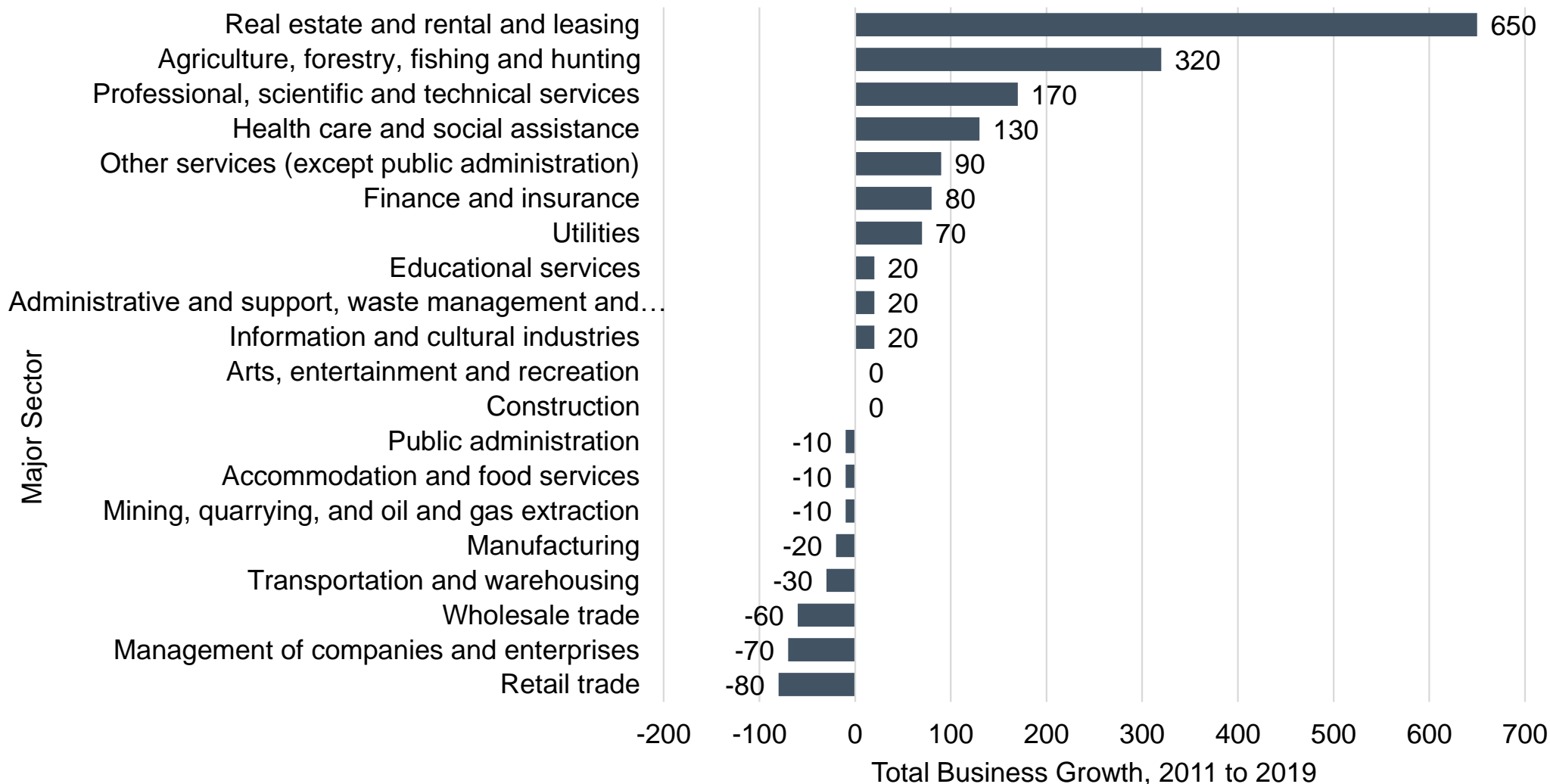
Source: Huron County, Perth County, and Bruce County forecasts conducted by Watson & Associates Ltd. Wellington County, Dufferin County, and the Region of Waterloo from the 2019 Growth Plan. Grey County Forecast from 2018 Growth Management Strategy Update.

Bruce County Permanent Incremental Housing Growth, 2016 to 2046

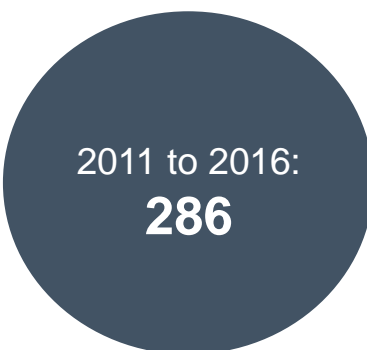


Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2020.

Bruce County Business Growth, 2011 to 2019



Annual Business Growth:



Source: 2011 and 2019 Canada Business Count data, by Watson & Associates Economists Ltd., 2020.

Note: Business counts displayed capture both companies with and without employees.

Bruce County

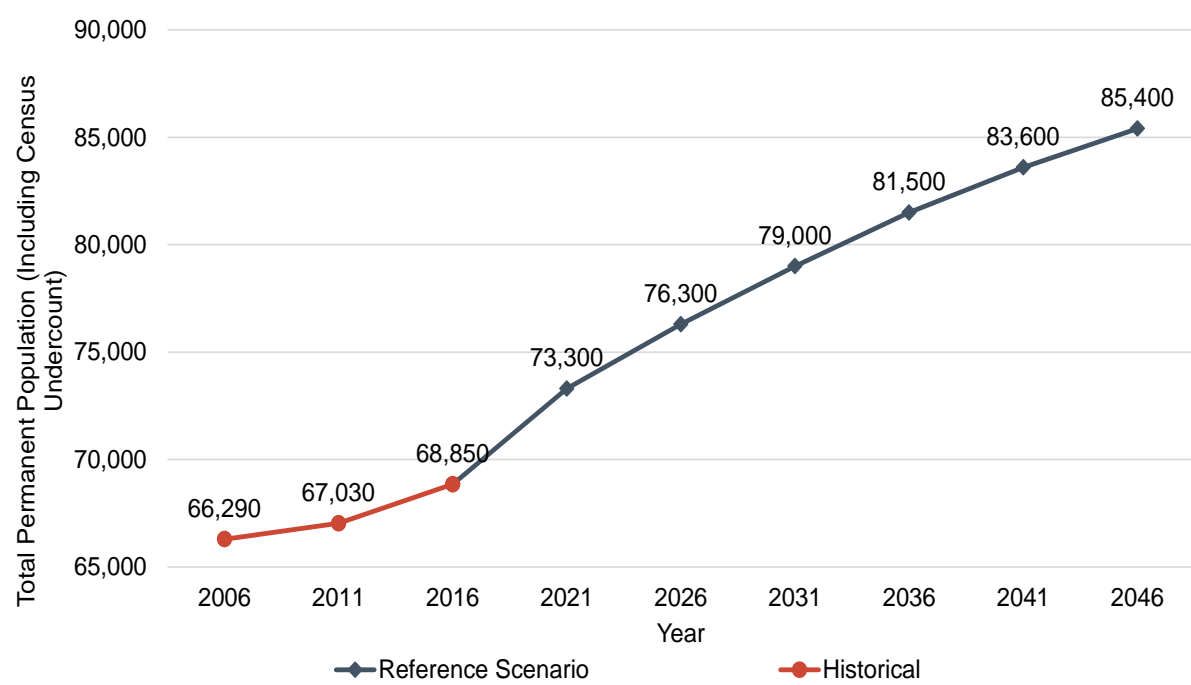
Reference Growth Scenario, 2016 to 2046

Bruce County Preferred Permanent Population Growth Scenario, 2016 to 2046



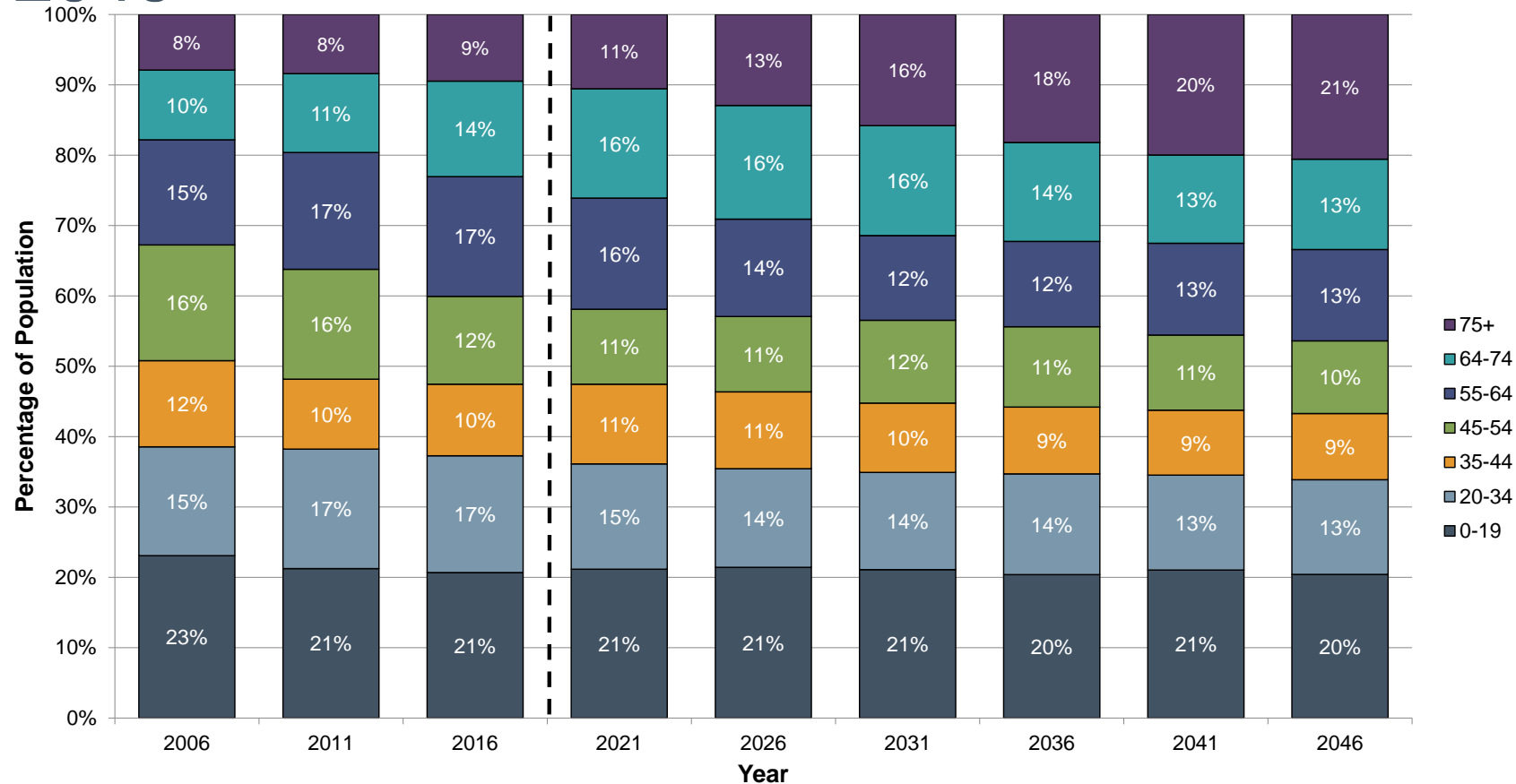
The reference scenario represents the preferred scenario for the following reasons:

- Represents a reasonable reflection of growth relative to historical trends;
- Embraces the identified growth drivers;
- Contextualizes Bruce County growth potential within the regional market area; and
- Represents realistic forecast migration trends and age structure.



Source: Forecast by Watson & Associates Economists Ltd., 2020.
Note: Population includes the net Census undercount estimated at 2.65%.

Bruce County Permanent Population Forecast by Age, 2016 to 2046

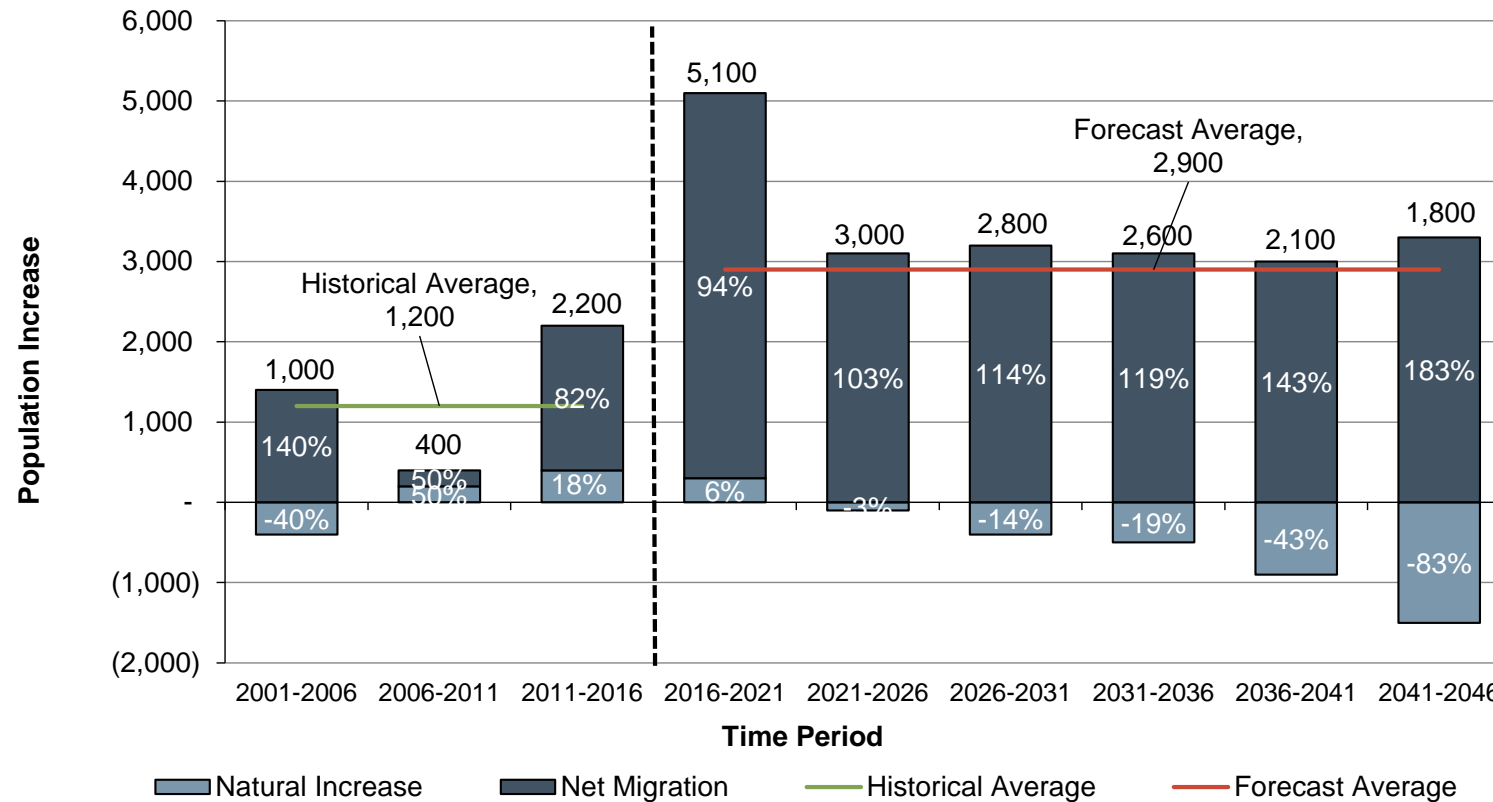


Source: 2006 to 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2020.

Note: Population includes the net Census undercount estimated at 2.65%.

- Bruce County's population is aging, between 2016 and 2051 the percentage of persons 75+ years of age or older is forecast to more than double.

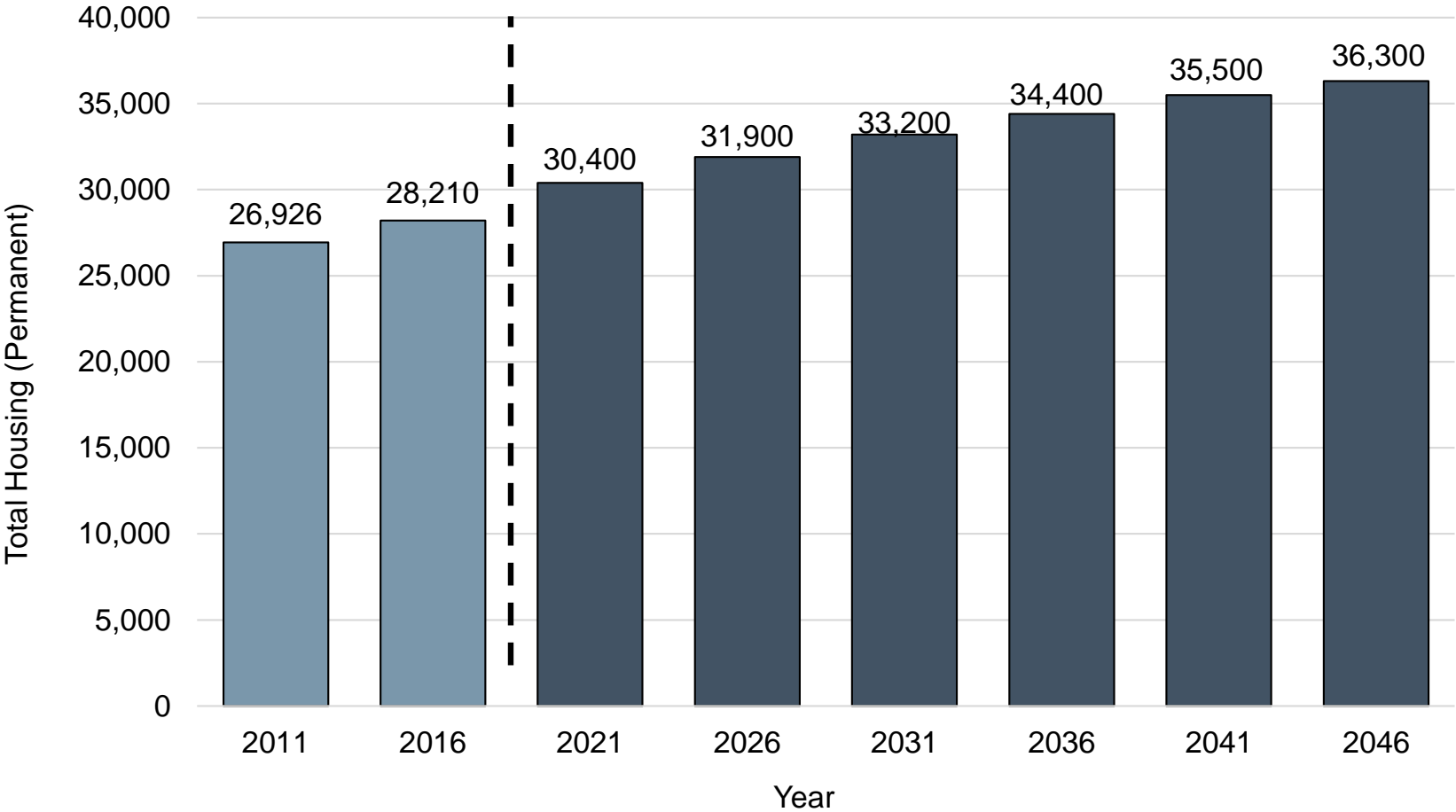
Bruce County Components of Permanent Population Growth, 2016 to 2046



Source: Derived from Statistics Canada, Demography Division. 2001-2016 estimated by Watson & Associates Economists Ltd., 2019.
Note: Includes Census undercount of approximately 2.65%.

- Due to the aging of the population, Bruce County will be more dependent on net-migration as a source of population growth as opposed to population growth from natural increase.

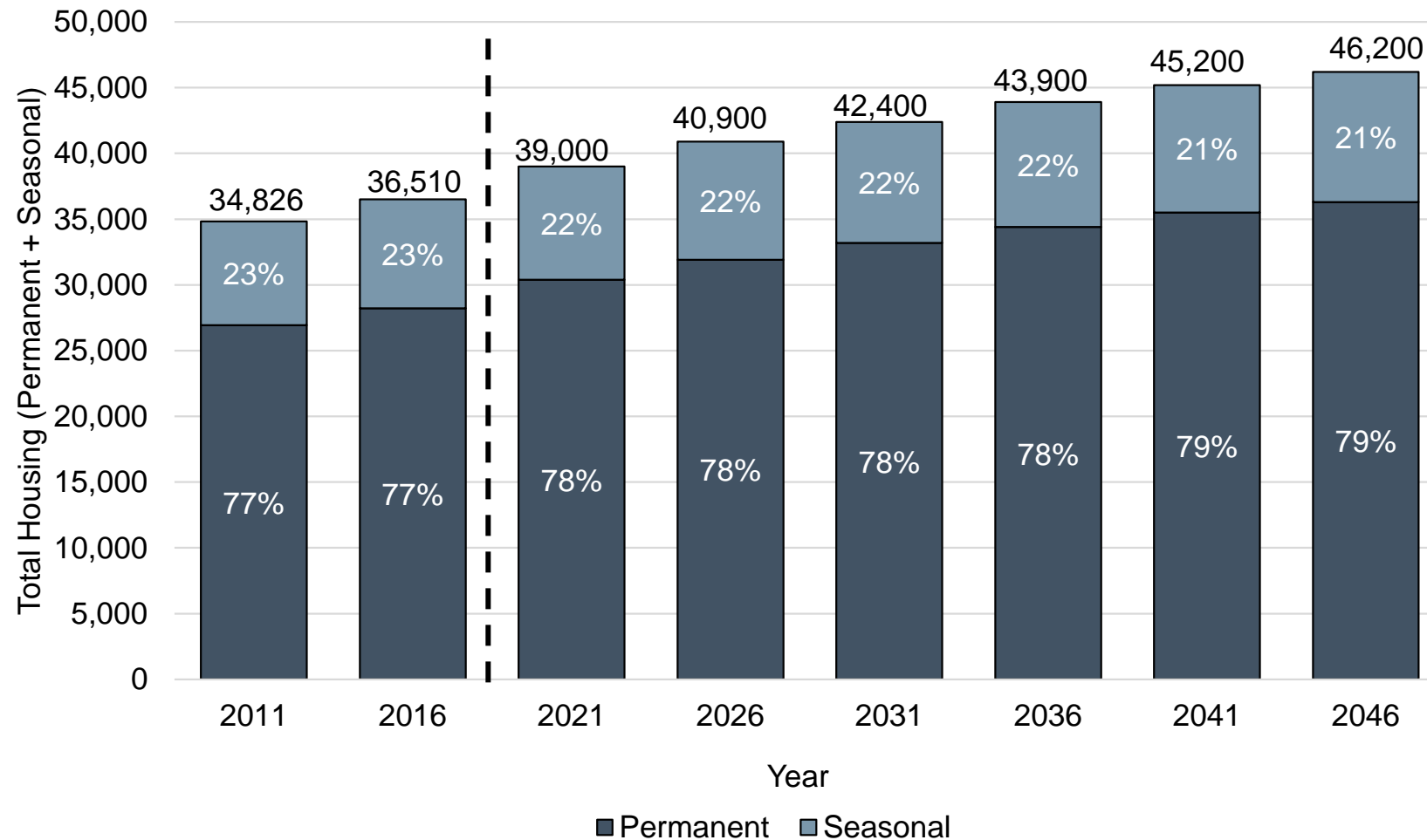
Bruce County Total Permanent Housing Forecast, 2016 to 2046



2021 to 2046
total housing
growth:
5,900 units

Source: Historical data from Statistics Canada Census and MPAC data. Forecast by Watson & Associates Economists Ltd., 2020.
Note: Seasonal unit PPU assumption of 3.58.

Bruce County Total Housing Forecast (Permanent + Seasonal), 2016 to 2046

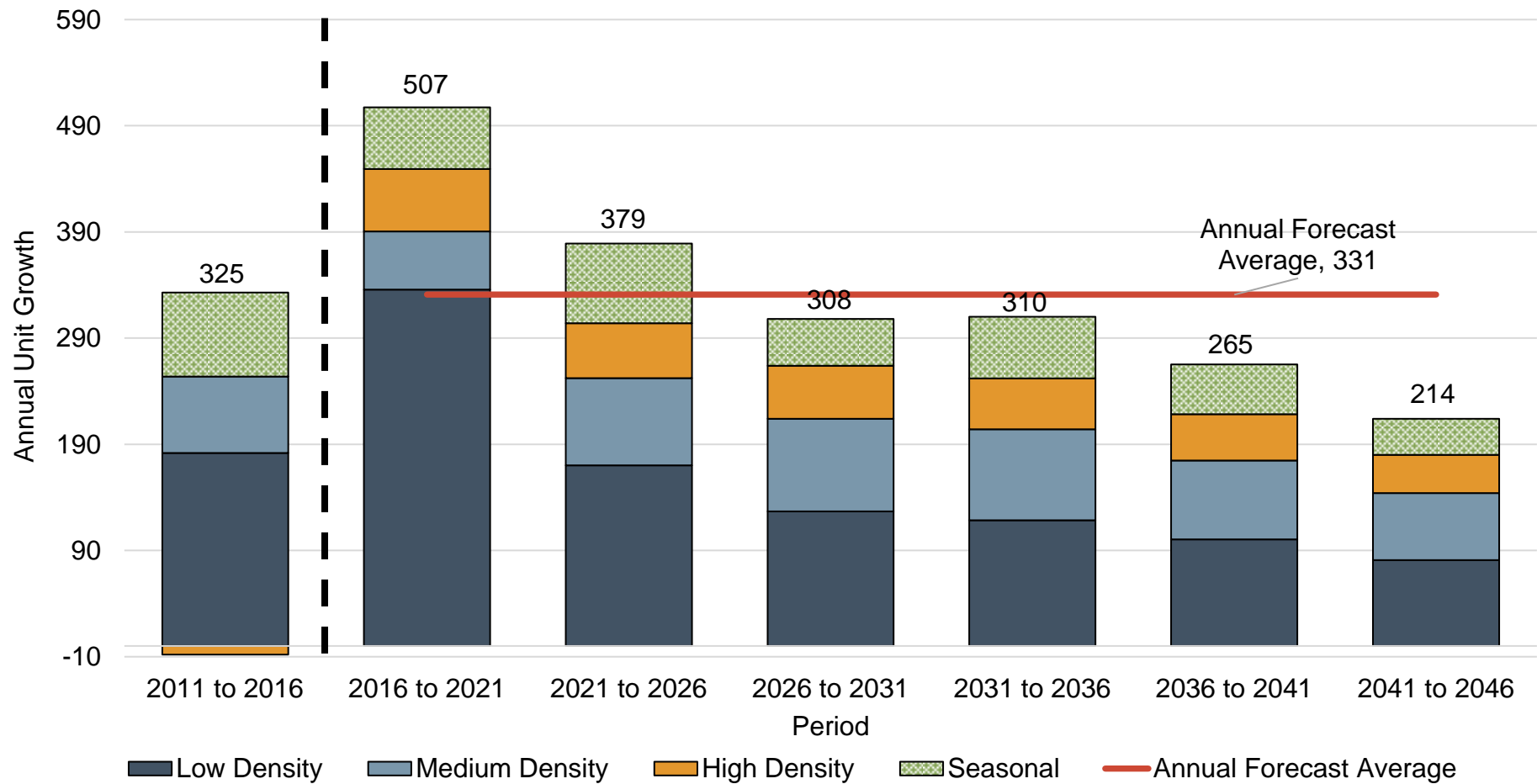


2021 to 2046
total housing
growth:
7,200 units

Source: Historical data from Statistics Canada Census and MPAC data. Forecast by Watson & Associates Economists Ltd., 2020.

Note: Seasonal unit PPU assumption of 3.58.

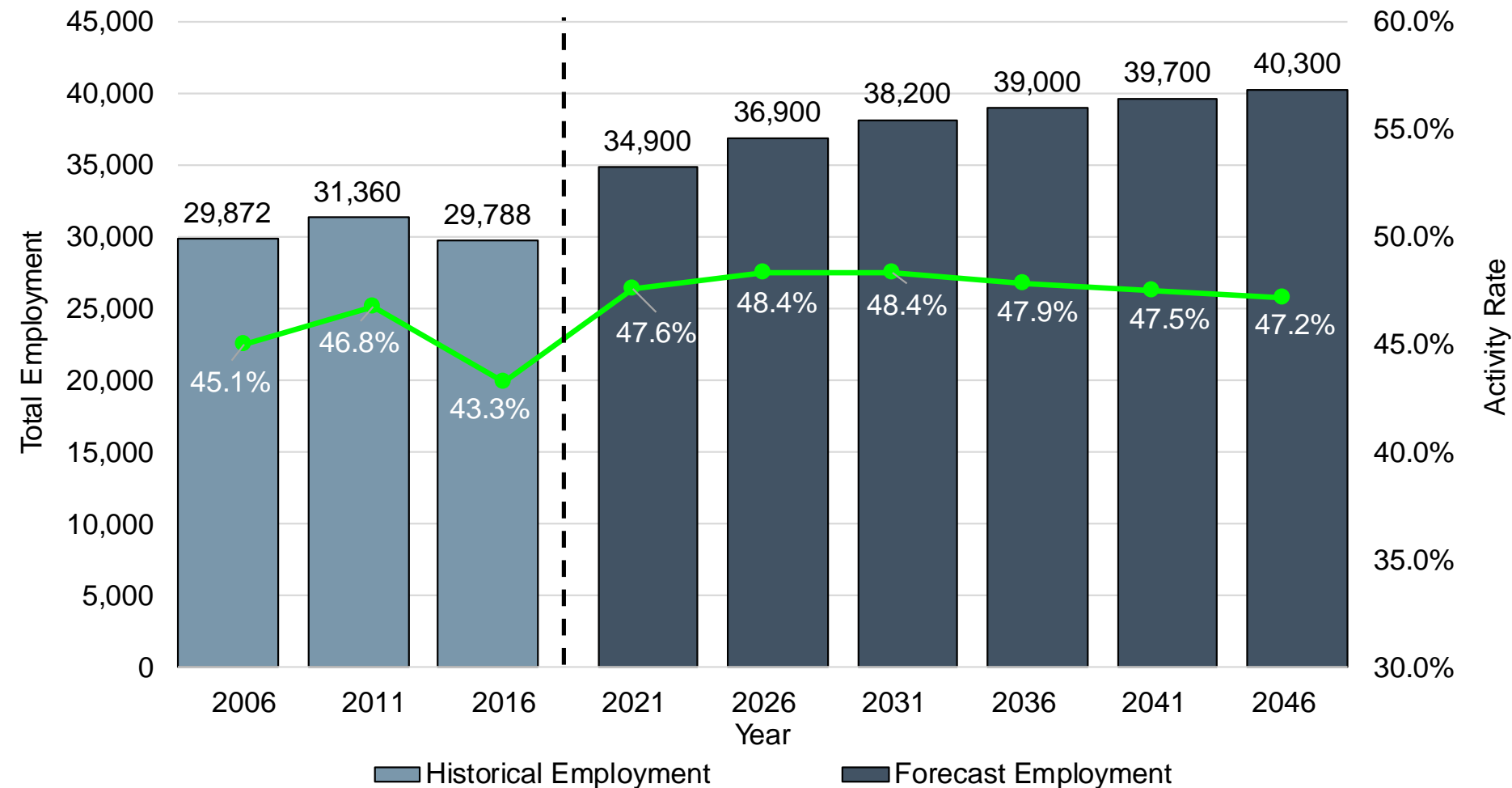
Bruce County Incremental Housing Growth Including Seasonal, 2016 to 2046



Source: Historical data from Statistics Canada Census and MPAC. Forecast by Watson & Associates Economists Ltd., 2020.

- Seasonal dwellings account for 17% of all forecast unit growth in Bruce County between 2016 and 2046

Bruce County Preferred Employment Forecast, 2016 to 2046



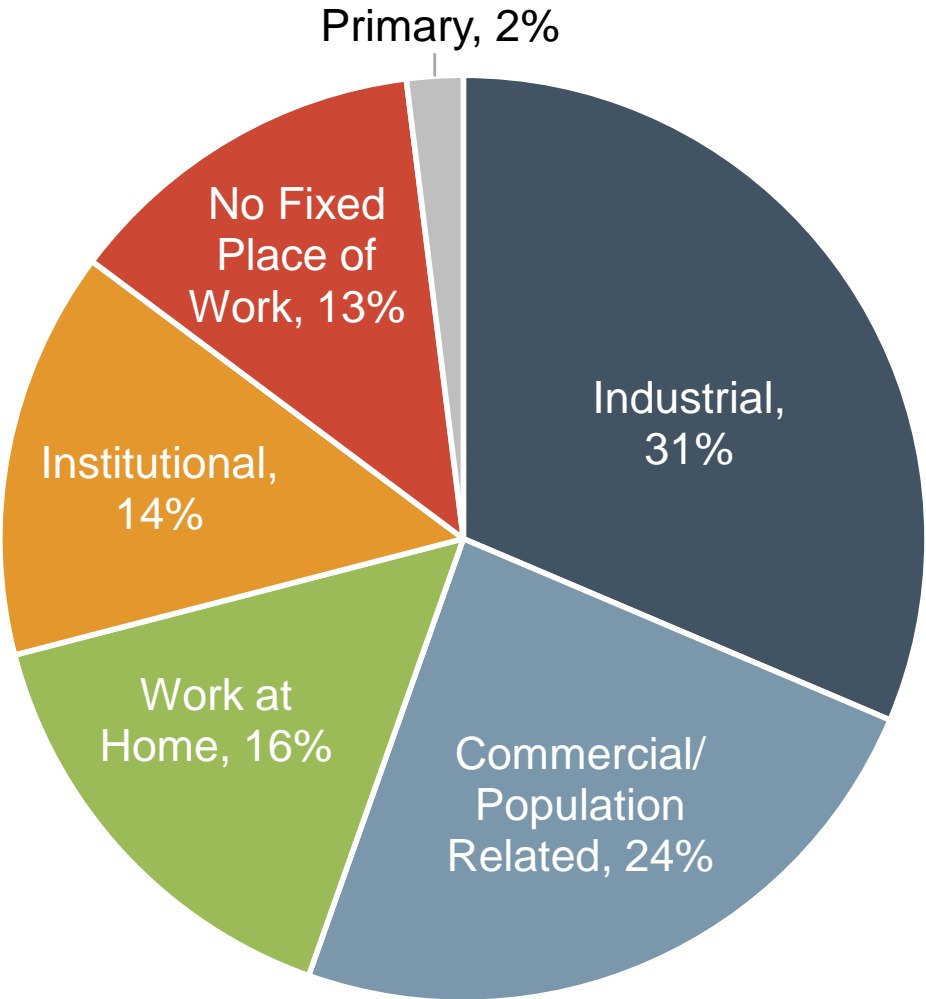
Note: Activity rate is calculated with population including the net Census undercount estimated at 2.65%.

Source: 2001 to 2016 from Statistics Canada place of work data including work at home and no fixed place of work data.

Employment forecast derived by Watson & Associates Economists Ltd., 2020.

Note: Numbers have been rounded

Bruce County Preferred Employment Forecast by Type, 2016 to 2046



Source: Forecast by Watson & Associates Economists Ltd., 2020.

Next Steps

Next Steps & Timelines



- Technical Growth and Land Needs Assessment (November 2020);
- Initial Public Engagement (November 2020);
- Policy and Strategic Recommendations (December 2020);
- Stakeholder Engagement Session (January 2021); and
- Final Report (March 2021)