



# PLAN THE BRUCE: Good Growth

Interim Report

March, 2021

---PLAN the BRUCE...  
GPS

## Executive Summary

Bruce County is embarking on a journey to a new County Official Plan.

To make sure the Official Plan guides growth and development in a way that resonates with residents, visitors, business owners, community leaders and other stakeholders, the County undertook Bruce GPS in 2018 and 2019. Bruce GPS was a community visioning process that resulted in a Vision Statement and eight Guiding Principles to inform the new Official Plan. The Plan the Bruce: Good Growth project is based on Principle 1: to “put growth in the right locations with the right services.”

Building on the Guiding Principles, County Council committed to prepare and circulate Discussion Papers. These papers will provide a base for conversations in the community about the next steps needed to bring the Guiding Principles to life in land-use policies.

As part of the Plan the Bruce project, Bruce County retained Watson & Associates Economists Ltd. (Watson) and WSP to complete a growth management strategy (GMS). This Interim Report outlines the technical results and strategic policy direction of the GMS that will inform the comprehensive review of the Bruce County Official Plan (OP). The GMS includes an overview of the County’s projected growth and associated land needs over the next 25 years, consistent with the Provincial Policy Statement (PPS).

The Good Growth Interim Report includes the following:

- A review of Demographic, Economic and Socio- Economic Profile and Assessment of Growth Drivers;
- Vacant Residential and Non-Residential Supply Analysis, including a review of residential intensification opportunities;
- Residential and Non-Residential Demand Analysis, including the preparation of population, household and employment forecasts, as well as their allocation by local municipality;
- A review of Residential and Non-Residential Land Needs by the year 2046;
- Public Engagement;
- Policy and Strategic Recommendations.

The results of this analysis are intended to guide policy development specifically related to planning and growth management, urban land needs, affordable housing, municipal finance and infrastructure planning. More specifically, an updated growth forecast will be used as background to the County’s Official Plan Review.

## Drivers and Disruptors of Future Population Change in Bruce County

- For Bruce County, outward growth pressure from the Golden Greater Horseshoe (GGH) is anticipated to be most heavily felt in the County's larger urban centres.
- For Bruce County, coronavirus disease (COVID-19) has acted as a near-term driver of future housing growth led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade "city lifestyles" for "smaller town living." It is important, however, not to overstate the near-term impacts of COVID-19 on housing demand in Bruce County over the long term.
- It is important to recognize the impact that the seasonal segment of the population has on future housing demand, infrastructure needs, economic development and municipal services.

## County-Wide Population, Housing and Employment Growth Forecasts, 2016 to 2046

A long-term population, housing and employment forecast has been prepared and summarized for Bruce County. The forecast aligns with recent demographic, economic and socio-economic trends, as well as the growth drivers identified for the County.

- Under the Preferred Employment Growth Scenario, the Bruce County employment base is expected to increase by approximately 10,700 jobs by 2046.
- Bruce County's permanent population is expected to reach 86,200 by 2046, increasing by approximately 17,400 from 2016.
- By 2046 the County's permanent housing base is forecast to increase to 36,800 households from 28,200 in 2016.
- Over the 2016 to 2046 projection period, new housing is forecast to be comprised of 56% low-density (singles and semi-detached), 27% medium-density (townhouses) and 17% high-density (apartments) units.
- Over the next 30 years, just over 50 new seasonal housing units are forecast to develop annually, totaling just under 1,600 new seasonal units across the County.

## Allocation of Population, Housing and Employment Growth Forecasts by Local Municipality to the Year 2046

- The Town of Saugeen Shores is expected to accommodate the largest share of housing growth over the 2016 to 2046 forecast period, with 41% of County-wide new housing development.
- Near-term employment growth within the County is anticipated to be concentrated within the Municipality of Kincardine, largely driven by employment growth associated with the Bruce Power refurbishment.
- Similar to existing conditions, the largest share of seasonal housing growth is anticipated in the Municipality of Northern Bruce Peninsula (approximately 65%) and the Town of South Bruce Peninsula (20%).

- Of the total 8,300 housing units forecast for Bruce County, approximately 7,700 units (92%) are expected in the County's Urban Communities.
- Nearly all new medium- and high-density housing development is forecast to occur in Urban Communities.

#### Residential and Non-Residential Land Needs, 2021 to 2046

- The County's aggregate supply of designated land within its Urban Communities is sufficient to accommodate urban housing demand over the 25-year planning horizon at a County-wide level. A surplus of designated urban lands is forecast across all the County's Primary and Secondary Urban Communities.
- All Primary and Secondary Urban Communities are forecast to experience an Employment Area land surplus by 2046, except in Saugeen Shores.
- The Saugeen Shores Urban Community is expected to experience a shortfall of designated Employment Area lands between 2026 and 2031. By 2046, a total Employment Area deficit of 16 net ha (40 net acres) has been identified for the Saugeen Shores Urban Community.

#### Policy and Strategic Recommendations

The primary objective of the Bruce County GMS is to provide a long-term vision for the County which ensures that its area municipalities continue to develop in a competitive and sustainable manner that is well balanced between future population and employment growth. A fundamental objective of the GMS is to understand how and where residential growth within the County and local municipalities will occur over the long-term planning horizon. Residential growth policies of the Bruce County OP will need to be consistent with the PPS, 2020 while being considerate of the specific County and local municipality contexts. It is also required that the County plan for residential growth in a coordinated, sustainable and resilient manner that makes efficient use of land, resources and infrastructure, while protecting public health and safety. The following residential policy themes are discussed:

No.	Residential Policy Themes
1	Maintain a Distinct Settlement Area Structure
2	Plan for Permanent Population Growth Within the County
3	Plan for Seasonal Population Growth Within the County
4	Update County-wide Housing Projections
5	Promote and Plan for Residential Intensification
6	Define a Regional Market Area



7	Responsibly Manage Municipal Infrastructure
8	Develop a Robust Plan Monitoring and Evaluation Framework

Another fundamental objective of the GMS is to ensure an adequate supply and market choice of employment lands exist within well-defined designated industrial areas located throughout the County to accommodate demand over the next 25 years and beyond. Accordingly, the following non-residential policy themes are discussed:

No.	Non-Residential Policy Themes
9	Establish Consistent Employment Area Delineations
10	Continue to Plan for Future Employment Lands Development within Bruce County
11	Ensure that Employment Lands are Well Adapted to Structural Changes Occurring in the Evolving Macro-Economy
12	Provide Stronger Direction Regarding Employment-Supportive Uses in Employment Areas
13	Develop a General Marketing Strategy to Promote and Develop the County's Employment Areas
14	Continue to Provide Broader Market Choice on Bruce County Employment Lands
15	Explore Opportunities for Intensification of Employment Lands within Urban Settlement Areas
16	Protect Employment Lands from Conversion to Non-Employment Uses
17	Continue to Recognize Opportunities for Agricultural-related Industrial and Commercial Uses on Agricultural Lands Subject to Local OP Policies
18	Plan for the Vision of the Urban Employment Areas by Mitigating Land-Use Compatibility Conflicts
19	Encourage Office Development in Downtowns and Support Smaller-Scale Office Opportunities in Designated Employment Areas
20	Conduct a Commercial Land Needs Study that Specifically Addresses the County's Retail Requirements and Commercial Structure.

## Good Growth Interim Report

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# 1 Introduction

Bruce County is embarking on a journey to a new County Official Plan.

To make sure the Official Plan guides growth and development in a way that resonates with residents, visitors, business owners, community leaders and other stakeholders, the County undertook Bruce GPS in 2018 and 2019. Bruce GPS was a community visioning process that resulted in a Vision Statement and eight Guiding Principles to inform the new Official Plan. The Plan the Bruce: Good Growth project is based on Principle 1: to “put growth in the right locations with the right services.”

Building on the Guiding Principles, County Council committed to prepare and circulate Discussion Papers. These papers will provide a base for conversations in the community about the next steps needed to bring the Guiding Principles to life in land-use policies.

The purpose of this Interim Report is to help answer key questions.

Growth usually means an increase of people, jobs, businesses, buildings, roads and traffic. Growth can also mean supporting community amenities like arenas and schools or improving infrastructure. Where growth happens – and how it happens – needs to be carefully planned. Planning helps to put growth in the right place, with the right services, to provide the most benefit to the community.

The Good Growth discussion paper aims to provide Bruce County with a comprehensive vision for growth over the next 25 years, as well as to help with the following:

- Understand Bruce County’s change in population and employment profile;
- Understand where it is appropriate to direct growth;
- Determine availability of existing residential and employment lands to accommodate future growth;
- Identify potential areas where settlement areas should be expanded;
- Establish policy direction for residential intensification and density; and
- Identify planning tools and policies to best facilitate Bruce County’s growth.

Good planning decisions now will help us inspire growth and development innovation in the right proportions and the right places while sustaining our quality of life.

## 1.1 Project Scope

Bruce County retained Watson & Associates Economists Ltd. (Watson) and WSP in the winter of 2020 to undertake a growth management strategy (GMS). This GMS will inform the comprehensive review of the Bruce County OP and, as such, will include an overview of the County’s projected growth over the next 25 years, consistent with the

Provincial Policy Statement (PPS). This analysis has been designed to address the following items:

- A review of Demographic, Economic and Socio- Economic Profile and Assessment of Growth Drivers;
- Vacant Residential and Non-Residential Supply Analysis, including a best-practices review of intensification policies;
- Residential and Non-Residential Demand Analysis, including the preparation of population, household and employment forecasts, as well as their allocation by local municipality;
- A review of Residential and Non-Residential Land Needs by the year 2045;
- Public Engagement; and
- Policy and Strategic Recommendations.

The results of this analysis are intended to guide policy development specifically related to planning and growth management, urban land needs, municipal finance and infrastructure planning carried out for Bruce County. More specifically, this growth forecast update will be used as background to the County's Official Plan Review.

## 1.2 Key Bruce County Plans and Initiatives

In preparing this report, background was provided by the strong base of existing Plans and strategies that articulate a vision for Bruce.

### Bruce County Official Plan

The original County Official Plan was approved in 1999. In 2010, the Province approved a major update to the County's Official Plan, including updated population projections to 2021 as well as high-level growth policies.

Much has changed in Bruce County with regard to population and employment growth since the last Official Plan update. Growth has clearly outpaced what was projected in 2010. The County also has new growth-related responsibilities that it has not previously had to consider, including allocating and monitoring growth. Given this context, the Good Growth project will evaluate where we are now and help guide the County's growth to 2046 through updated growth projections and policies to be included in the County's next Official Plan.

#### *Growth objectives and policies in the current Official Plan*

The current Official Plan sets out high-level objectives and policies related to population and employment growth. These objectives and policies include:

- Directing 80% of growth to Primary and Secondary Urban Communities and allowing for some development within the existing boundaries of Hamlet Communities;
- Providing for intensification in existing urban areas;

- Managing growth in a way that will minimize adverse impacts on agricultural and heritage features, taking into consideration the availability of appropriate types and levels of services;
- Encouraging a better overall balance of dwelling types to accommodate the County's changing population; and
- Maintaining a development density target of 15 dwelling units per gross developable hectare.

## Bruce GPS Public Engagement Related to Growth

Bruce GPS was a public engagement visioning campaign designed to establish a complete vision for the future of the County. Community consultations for this project reached over 10,000 people and received input from over 1,800 people.

Regarding growth, the community made it clear that:

- It is important to manage growth and development to preserve the character, look and feel of small towns and the beauty of the natural environment, while still allowing for growth and development that will enable people to make a decent living within the County. Growth impacts the look of town, traffic, natural environment and farmlands;
- We need to ensure growth is managed to minimize impact on the “look” of towns, traffic and crowding, historical structures, the natural environment and farmland; and
- The vision for the future should include enough infrastructure to support growth.

## Land Use Service Delivery Review (Official Plan Best Practices)

In late 2020, Council endorsed the Bruce County - Land Use Service Delivery Review Final Report, which was produced by StrategyCorp Inc., based on extensive consultation with key stakeholders throughout Bruce County. The goal of the Report was to make recommendations towards improved service delivery of the Planning function in Bruce County as well as to modernize the Official Plan to make it more effective, relevant, and accessible.

Part of the undertaking for this report included a review policy approaches in Bruce County and identifying where there are opportunities or best practices that the current Official Plan is silent on or has not approached due to its age. The Report identifies eight opportunities and makes twenty-seven recommendations for improved service delivery and Official Plan policy best practices. With regards to growth management, the Reports offers the following:

- Link the diverse areas of Bruce County in a coordinated planning framework by:
  - Creating a coordinated Countywide planning approach for settlement areas and hamlets, while remaining sensitive to local contexts;

- Having increased specificity on growth management policies designed with local municipal input;
- Providing flexibility to respond to unforeseen shifts in population growth and send market signals of where it may choose to expand if a substantial and unforeseen increase in demand arises and cost-effective municipal servicing permits.
- Address Housing by:
  - Applying intensification and density targets for local municipalities according to population allocation, land supply, future transit provision, and existing conditions.

## Plan the Bruce: Homes

The Plan the Bruce: Homes Report is the most aligned with the Good Growth Report of the eight distinct topic areas that the County is advancing through the Plan the Bruce project in support of its Official Plan Review. There is considerable overlap in terms of policy development that these two reports will provide.

The Plan the Bruce: Homes - Interim Report was released in December 2020 and will be completed in the Spring of 2021 after consulting with the public and key stakeholders. The goal of the Report is to increase the supply and mix of homes in Bruce County through land use planning tools. The Interim Report makes thirteen recommendations to achieve this goal, as indicated below:

Topic	Recommended Direction
1. Apply housing targets	Develop and implement targets to increase supply of affordable units in areas close to existing jobs, services, and transportation choices. These should align with the Housing and Homelessness plan and focus on the needs of households in the lowest 60% of the income distribution.
2. Permit additional dwelling units	Update County and Local Official Plans (and by-laws) to permit additional units within a dwelling and within a separate building on a lot with appropriate conditions.
3. Permit smaller homes	Consider directing local plans and by-laws to remove restrictions that require dwelling unit sizes that are larger than building code standards
4. Permit more types of homes	Consider directing by-laws to describe and permit a broader range of dwelling unit types
5. Increase stability and flexibility	Investigate opportunities for a Community Planning Permit system (CPPS) which essentially pre-plans neighbourhoods, enables approvals with conditions, and includes opportunities to



Topic	Recommended Direction
through development permitting process	provide flexibility within a defined range with less risk of appeal.
6. Maintain supply of rental units	Consider criteria for conversions of standard rental units to condominiums or short-term accommodations to maintain rental unit supply. In addition, consider working with local municipalities to establish rules for short-term rentals in houses and apartments that can be used to house year-round residents.
7. Use appropriate density to lower development costs	Together with 'Good Growth' Discussion Paper, consider where services are or can be available to support growth and development, and consider designating serviced areas and corridors as areas for increasing density through infill, intensification, and redevelopment, as well as clear criteria for height and/or density
8. Incentives that lower process and operating costs	Consider updating Community Improvement Plans to reduce application fees, development charges, and/or provide opportunities for Tax Increment Financing, for developments with guaranteed-affordable housing
9. Reduce operating costs by design	Encourage energy-efficient subdivision and building designs that reduce operating costs.
10. Prioritize applications	Consider criteria for prioritizing and/or fast-tracking review of housing development proposals that support affordable housing targets
11. Maintain land inventory	Improve data gathering and reporting to assist Municipalities with maintaining inventory of land for development
12. Use surplus public lands for homes	Apply a "housing first" policy for surplus public lands.
13. Require affordable housing	Consider requesting an inclusionary zoning order from the Provincial Government to enable municipalities to require affordable dwelling units in new developments.

## 1.3 Provincial Policy Statement, 2020

The Province plays an important role in guiding growth, particularly through its primary planning policy document - the Provincial Policy Statement (PPS). The PPS provides high-level policy direction for planning and regulating the development and use of land within Ontario. All decisions that affect land-use planning for municipalities across Ontario must be consistent with the PPS. The analysis provided in the Interim Good Growth report represents a key component of the comprehensive review exercise as defined by the PPS, 2020.<sup>1</sup> According to the PPS, 2020, a comprehensive review is defined as an OP Review which is initiated by a planning authority, or an OP Amendment which is initiated or adopted by a planning authority for the purposes of policies 1.1.3.8 (expansion of a settlement area), 1.1.3.9 (settlement area boundary adjustments) and 1.3.2.4 (conversion of land within Employment Areas).

In accordance with the PPS, 2020, a comprehensive review:

- “is based on a review of population and employment projections and which reflect projections and allocations by upper-tier municipalities and provincial plans, where applicable; considers alternative directions for growth or development; and determines how best to accommodate the development while protecting provincial interests;
- utilizes opportunities to accommodate projected growth or development through intensification and redevelopment; and considers physical constraints to accommodating the proposed development within existing settlement area boundaries;
- is integrated with planning for infrastructure and public service facilities and considers financial viability over the life cycle of these assets, which may be demonstrated through asset management planning;
- confirms sufficient water quality, quantity and assimilative capacity of receiving water are available to accommodate the proposed development;
- confirms that sewage and water services can be provided in accordance with policy 1.6.62; and
- considers cross-jurisdictional issues.”

The PPS, 2020 identifies that, “In undertaking a comprehensive review, the level of detail of the assessment should correspond with the complexity and scale of the settlement boundary or development proposal.”<sup>2</sup>

In summary, a comprehensive review is used to establish a long-term vision and planning framework for a municipality that fosters a sustainable approach to future

<sup>1</sup> 2020 Provincial Policy Statement. Under the Planning Act. Ministry of Municipal Affairs and Housing. Ontario.

<sup>2</sup> 2020 Provincial Policy Statement. Under the Planning Act. Ministry of Municipal Affairs and Housing. Ontario. Pg. 10

residential growth and economic development. This GMS functions as input to the comprehensive review, which examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon (up to 25 years) within the context of provincial, County and local planning policy.

## 1.4 Long-Term Population and Household Forecast Approach

The County-wide population forecast, prepared herein, is based upon the cohort-survival methodology. This provincially accepted approach assesses annual population by age and sex, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the County less out-migration, by age group).

Historical and forecast population trends are also considered at the regional and provincial levels relative to Bruce County in accordance with historical Census data and approved municipal, regional and provincial forecasts. This analysis provides further insight into the County's potential share of population growth relative to the broader regional market area. The growth forecast provides details regarding population growth by age, sex, net migration, births and deaths from 2016 to 2046, summarized in five-year increments.

The forecasts provided herein do not include individuals residing on First Nations reserves. Land-use planning and growth forecasting within First Nations reserves is not at the discretion of the Province. When drawing on Statistics Canada data to determine Bruce County's population, housing and employment base, First Nations populations have been subtracted from the Census Division base. While excluding population within First Nations reserves, the base data and forecasts do account for Aboriginal people living off a reserve within Bruce County.

Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy. Accordingly, County-wide total housing growth has been generated from the population forecast by major age group using a headship rate forecast. A headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e. cohort).<sup>3</sup> An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age. While major fluctuations in headship rates are not common over time, the ratio of household maintainers per capita varies by population age group. For example, a municipality with a higher percentage of seniors will typically have a higher household maintainer ratio per capita (i.e. headship rate) compared to a municipality with a younger population. This is because households occupied by seniors typically have fewer children than households occupied by adults under 65 years of age.

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<sup>3</sup> It is noted that each household is represented by one household maintainer.

Forecast trends in households by structure type (i.e. singles/semi-detached, townhouses and apartments) are also explored based on the following supply and demand factors:

- Historical housing activity from Census data, Municipal Property Assessment Corporation (MPAC) data and building permit activity;
- A high-level review of housing affordability (household income trends vs. trends in housing prices by structure type);
- Historical housing propensity trends (i.e. demand) by structure type for Bruce County and the impacts of the aging of the County's population on future types of housing demand; and
- Consideration of the County's appeal to families, empty-nesters, seniors and seasonal residents.

Forecast market demand for seasonal housing has also been analyzed herein, based on an assessment of market demand for seasonal housing by local municipality in Bruce County. Seasonal dwelling counts were derived from MPAC data between 2011 and 2019. MPAC determines the value and property-type classification for all properties in Ontario. These property-type classifications inform the analysis herein, to determine the amount and type of seasonal dwellings across the County. Forecast seasonal housing demand is also largely based on an assessment of the key market areas which are anticipated to drive the demand for seasonal housing (i.e. Greater Golden Horseshoe (GGH)).

## 2 Demographic, Economic and Socio-Economic Profile and Assessment of Long-Term Growth Drivers

### 2.1 What Drives Population Growth?

Ultimately, future population and housing growth within Bruce County will be determined in large measure by the competitiveness of the export-based economy within the County, as well as within the surrounding regional economic area. As such, in assessing the County's long-term population and employment growth potential, it is recognized that there is a direct link between provincial/regional economic growth trends and forecast regional net migration potential. This represents a fundamental starting point in addressing the forecast population and employment growth potential of Bruce County.

In developing the Bruce County population, housing and employment forecast, the following key economic trends and long-term growth drivers have been examined:

- National, provincial and region-wide economic trends that are anticipated to influence the growth and economic competitiveness within the local and regional employment market;



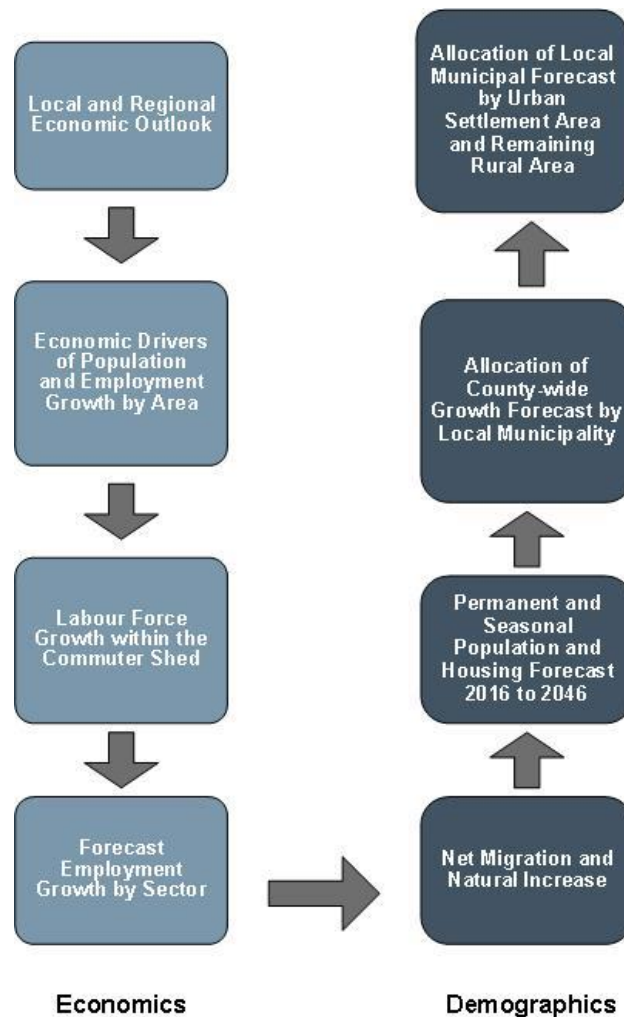
- Regional labour force trends based on a review of historical labour force growth and commuting patterns;
- Population and employment growth outlook for Bruce County considered within the context of the surrounding economic region, including:
  - Forecast employment growth potential within Bruce County by major employment sector;
  - Employment opportunities within the surrounding commuter-shed;
  - Demographic and labour-force impacts associated with an aging population;
  - Forecast housing market demand geared to young adults, families, empty nesters and retirees;
  - Housing affordability trends within the County;
  - The impacts of major business expansions/closures; and
  - Major infrastructure improvement, most notably the Bruce Power refurbishment project.

This broader analysis has been used to assess long-term demographic and economic trends for Bruce County within the context of the surrounding regional market area related to the following:

- Net migration by age;
- Population change by age;
- Future housing needs and forecast trends in household occupancy;
- Housing demand by structure type, tenure and location; and
- Employment by sector.

Our growth projection approach is summarized below in Figure 2-1.

Figure 2-1  
Approach to Long-Term Population, Housing and Employment Growth Forecast



This approach has been designed to answer the following questions regarding future development patterns and demographic/economic change:

- What is the long-term economic and population growth potential for the broader economic region?
- What share of forecast population growth within the broader regional market area should be assumed for Bruce County? How is this share expected to change over time?
- What are the existing and emerging industry clusters that are anticipated to influence the demand for employment by major sector within Bruce County? How are forecast employment growth trends by sector anticipated to compare with historical conditions?
- What are the key drivers of future population, housing and employment growth within Bruce County?

- How will evolving demographic and socio-economic trends related to the aging of the population and housing affordability impact future population growth rates and market demand for housing by type, tenure and development location (i.e. settlement area vs. remaining rural areas)?
- What will future housing development look like in Bruce County? What forms will new housing take within the local municipalities, in terms of structural type and housing occupancy? Who will be the target demographic groups?
- What is the growth potential related to seasonal housing (i.e. second homes)?
- What are the anticipated trends regarding the conversion of seasonal units to permanent dwellings?

## 2.2 Drivers and Disruptors of Change in Bruce County

### 2.2.1. Outward Growth Pressure

A key driver of the County of Bruce's future population and economic growth potential is its geographic location within Ontario. Bruce County is located to the west of one of the fastest growing Cities/Regions in North America, known as the Greater Golden Horseshoe (GGH). This region comprises the municipalities that make up the Greater Toronto and Hamilton Area (GTHA), as well as the surrounding Regions/Counties within central Ontario, known as the GGH "Outer Ring," which extends from Haldimand County in the southwest to Simcoe County in the north, to Peterborough County in the northeast (refer to Figure 2-2).

As identified in the Growth Plan, 2019 (A Place to Grow, amended 2020), the long-term outlook for the GGH is positive, characterized by strong population growth primarily through migration, fueled by economic growth that is concentrated in large urban centres. In accordance with Schedule 3 of the Growth Plan, 2019, the GGH population is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of approximately 5.4 million persons, or 154,000 persons per year. With respect to employment, the GGH is forecast to increase from 4.6 million employees in 2016 to 7.0 million by 2051, an increase of 2.4 million employees, or 68,600 employees per year. This represents a substantial increase in population and employment relative to other North American metropolitan regions of comparable population.

The rate and distribution of growth throughout central Ontario, in particular the GGH, is of key significance to Bruce County. As the more mature areas of central Ontario gradually build out, increasing outward growth pressure will be placed on municipalities within proximity to the GGH Outer Ring and beyond.

Figure 2-2  
Bruce County within the Context of the GGH

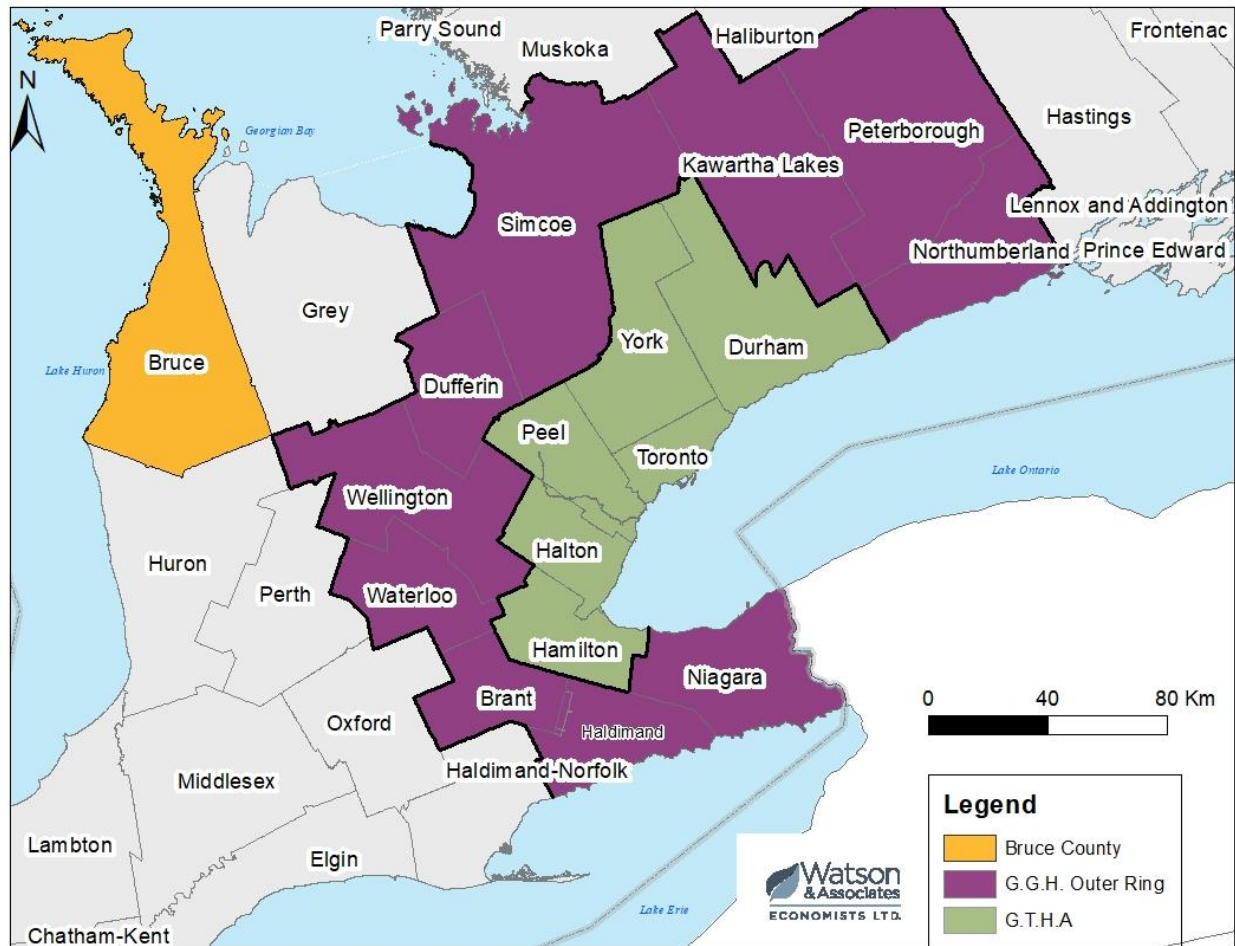


Figure 2-3 through

Area	Employment			2001 to 2016			2016 to 2051		
	2001	2016	2051	Total Employment Growth	Annual Employment Growth	Annual Employment Growth Rate	Total Employment Growth	Annual Employment Growth	Annual Employment Growth Rate
G.T.H.A.	2,938,000	3,564,000	5,360,000	626,000	42,000	1.3%	1,796,000	51,000	1.2%
G.G.H. Outer Ring	890,000	1,034,000	1,650,000	144,000	10,000	1.0%	616,000	18,000	1.3%
<b>Total G.G.H.</b>	<b>3,828,000</b>	<b>4,598,000</b>	<b>7,010,000</b>	<b>770,000</b>	<b>51,000</b>	<b>1.2%</b>	<b>2,412,000</b>	<b>69,000</b>	<b>1.2%</b>

Source: 2001 to 2016 derived from Statistics Canada Census. 2016 to 2051 from A Place to Grow: Growth Plan for the Greater Golden Horseshoe (2020). Figure by Watson & Associates Economists Ltd., 2020.



Figure 2-5 summarize the long-term population employment growth forecast for the GGH between the GTHA and the GGH Outer Ring. Figure 2-2 identifies that the GTHA has historically experienced a higher rate of population and employment relative to the GGH over the 2001 to 2016 period. Looking forward, the forecast annual population and employment growth rate of the GGH Outer Ring is anticipated to increase significantly, driven by continued outward grow pressure from the GTHA. In fact, the forecast annual rate of employment growth in the GGH Outer Ring is expected to exceed that of the GTHA between 2016 and 2051.

**Figure 2-3**  
Historical and Forecast Population Growth  
for the GGH, 2001 to 2051

Area	Population			2001 to 2016		2016 to 2051	
	2001	2016	2051	Total Population Growth	Annual Population Growth Rate	Total Population Growth	Annual Population Growth Rate
G.T.H.A.	5,808,000	7,183,000	11,170,000	1,375,000	1.4%	3,987,000	1.3%
G.G.H. Outer Ring	2,046,000	2,355,000	3,700,000	309,000	0.9%	1,345,000	1.3%
<b>Total G.G.H</b>	<b>7,854,000</b>	<b>9,538,000</b>	<b>14,870,000</b>	<b>1,684,000</b>	<b>1.3%</b>	<b>5,332,000</b>	<b>1.3%</b>

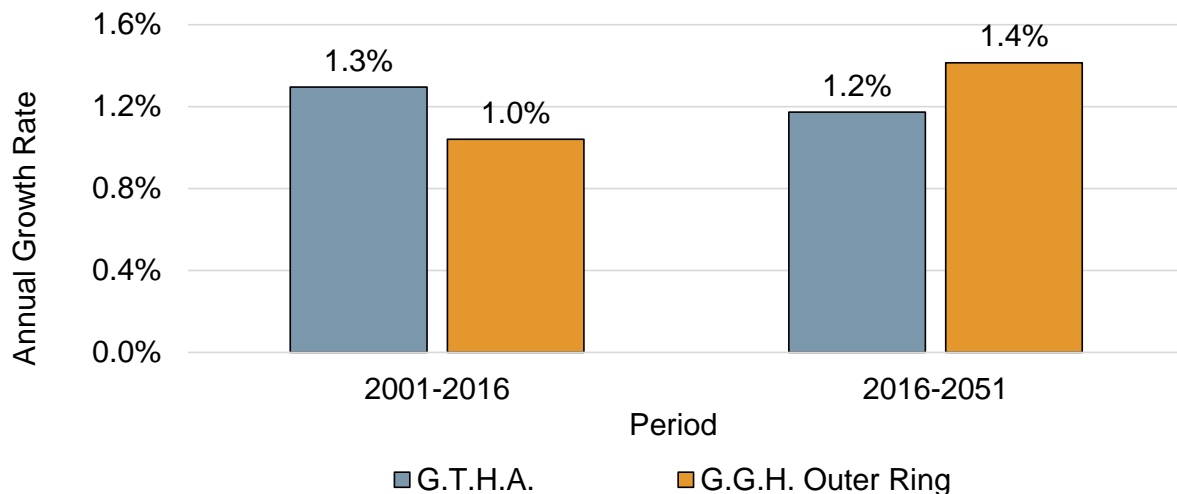
Source: 2001 to 2016 derived from Statistics Canada Census. 2016 to 2051 from A Place to Growth: Growth Plan for the Greater Golden Horseshoe (2020).  
Figure by Watson & Associates Economists Ltd., 2020.

**Figure 2-4**  
Historical and Forecast Employment Growth  
for the GGH, 2001 to 2051

Area	Employment			2001 to 2016			2016 to 2051		
	2001	2016	2051	Total Employment Growth	Annual Employment Growth	Annual Employment Growth Rate	Total Employment Growth	Annual Employment Growth	Annual Employment Growth Rate
G.T.H.A.	2,938,000	3,564,000	5,360,000	626,000	42,000	1.3%	1,796,000	51,000	1.2%
G.G.H. Outer Ring	890,000	1,034,000	1,650,000	144,000	10,000	1.0%	616,000	18,000	1.3%
<b>Total G.G.H</b>	<b>3,828,000</b>	<b>4,598,000</b>	<b>7,010,000</b>	<b>770,000</b>	<b>51,000</b>	<b>1.2%</b>	<b>2,412,000</b>	<b>69,000</b>	<b>1.2%</b>

Source: 2001 to 2016 derived from Statistics Canada Census. 2016 to 2051 from A Place to Growth: Growth Plan for the Greater Golden Horseshoe (2020). Figure by Watson & Associates Economists Ltd., 2020.

Figure 2-5  
Historical and Forecast Annual Employment Growth Rate  
for the GGH, 2001 to 2051



Source: 2001 to 2016 derived from Statistics Canada Census data. 2016 to 2051 derived Greater Golden Horseshoe Growth Forecasts to 2051 Technical Report, by Watson & Associates Economists Ltd., 2020.

The GGH represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The GGH is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The GGH industrial and office commercial real estate markets within this region are significant, having the third and sixth largest inventories, respectively, in North America.

With a robust economy and diverse mix of export-based employment sectors, the GGH is highly attractive on an international level to new businesses and investors. The GGH also has a strong appeal given the area's regional infrastructure (i.e. Toronto Pearson International Airport, other regional airports, provincial highways, inter-modal

facilities), access to labour force, post-secondary institutions and proximity to the U.S. border. In turn, this continues to support steady population and housing growth within this region, largely driven by international and inter/intra-provincial net migration to this region.

For Bruce County, this outward growth pressure is anticipated to be most heavily felt in the County's larger urban centres. It is anticipated that the majority of new residents migrating to Bruce County will be within the 25-54 age group; however, a proportion of new migrants is also expected in the 55-74 age group, given the County's attractiveness as a retirement destination. In turn, population growth across these broad demographic groups will also continue to drive growth in population-related employment sectors including retail, personal services, business services and health and social services.

Over the next 30 years, the County's local employment base is also forecast to increase, generating new live/work opportunities within Bruce County. Strong net migration levels associated with local economic opportunities are anticipated to drive housing growth across the County with demand across a broad range of housing typologies. The bulk of these new residents coming to Bruce County in the 19-54 age category will ultimately seek competitively priced ground-oriented housing forms (i.e. single detached, semi-detached and townhouses) to accommodate existing and/or future families.

Relative to the larger municipalities in the GGH Outer Ring (e.g. City of Waterloo, City of Kitchener and City of Guelph), average housing prices in Bruce County are lower and more affordable relative to local income. As housing prices continue to steadily rise across the County, however, it is foreseeable that an increasing proportion of the population in Bruce County, particularly younger generations, will be accommodated in various forms of high-density housing (i.e. walk-up apartments, triplexes and low-rise apartments). In addition, a proportion of residents in the 65+ age group will also be seeking accommodations in high-density housing options, ranging from condominiums and rental apartments to assisted living accommodations and seniors' complexes, largely within urban communities which offer access to urban amenities and health care services.

Population growth of the 65+ age group across Ontario will continue to be a key driver of housing growth in Bruce County over the next 30 years. For the Province of Ontario as a whole, the percentage of the 65+ age group to the total population is projected to increase from 16% in 2016 to 23% by 2046.<sup>4</sup> Future housing demand across Bruce County generated by the 65+ age group is anticipated to remain strong over the next decade driven by the aging of the Baby Boom population. This will generate an increasing need to accommodate a growing number of seniors in housing forms that

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<sup>4</sup> Ministry of Finance, Summer 2019 Update, Table 6: Ontario Population Projections, 2016-2046, reference scenario.

offer a variety of services ranging from independent living and active lifestyles to assisted living and full-time care.

### 2.2.2. Regional Economic Opportunities

Bruce County is characterized by a blend of expansive rural lands and vibrant urban settlement areas. The existing employment base is concentrated in utilities, retail trade, health care and social assistance and agriculture. According to Canadian Business Counts data, between 2011 and 2019 Bruce County's business growth was concentrated within real estate and rental and leasing, agriculture, professional, scientific and technical services and health care and social assistance. The economic base was also highly oriented towards small businesses and home-based occupations. According to the 2016 Census, Bruce County possesses a high live/work ratio, with 75% of residents working within the County and an additional 15% of residents working within Grey County. Comparatively, Bruce County has a slightly higher live/work ratio than both Grey and Huron County. This implies that the Bruce County economy is less reliant on larger employment markets within the GGH when compared to its neighbours.

Similar to the national, provincial and regional economies, the Bruce County economy is transitioning from goods production to services delivery. Looking forward, existing and emerging knowledge-based sectors, such as professional, technical and scientific services, finance and insurance, real estate and rental leasing, health care, information technology and agri-businesses, are expected to represent the fastest growing employment sectors in the County. Between 2011 to 2019, businesses within the professional and scientific services sector increased by 33%, while those operating in the health care sector grew by 72%.

Manufacturing remains vitally important to the provincial and regional economies with respect to jobs and economic output. It is important to recognize, however, that the nature of manufacturing is changing as industrial processes have become more capital/technology intensive and automated. Notwithstanding the current challenges that coronavirus disease (COVID-19) is placing on the regional manufacturing sector, this sector has shown signs of a gradual recovery within the region over the past few years. While the regional manufacturing sector is anticipated to show signs of continued recovery (post-pandemic), as measured by economic output, employment growth in this sector is anticipated to be modest.

The agricultural sector has been an integral element of the Bruce County economy, with diverse agricultural businesses and a high concentration of livestock operations. For the agricultural sector to continue as a driver of the local economy, farmers and processors must look for opportunities to invest in new technology and continue to adapt to changing market trends.

The need for local skilled labour is anticipated to continue to increase in the coming years to address future economic growth related to the County's small-scale

businesses, as well as larger projects in the surrounding geographies, such as the Bruce Power refurbishment, which commenced in January 2020. The project is expected to require 2,000 skilled tradespeople, who are scheduled to carry out the \$2.185-billion project in 46 months.” The Bruce Power refurbishment is expected to generate 22,000 jobs across the Province and inject \$4 billion a year annually into the Ontario economy. Supply chain companies have been locating into the area surrounding Bruce Power to support the refurbishment project. Bruce County can anticipate continued population and housing growth from this refurbishment project, as potential employees look to live in locations that offer competitively priced housing options within proximity to work.

It is important to recognize that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. Bruce County faces the risk of potential constraints to local economic growth because of the difficulty employers currently face finding skilled labourers. In 2019, 83% of employers across Grey, Bruce and Huron Counties assessed the availability of qualified workers as fair to poor.<sup>5</sup> Furthermore, employers expressed difficulty in filling a position because of the lack of applications and qualifications. To ensure that economic growth is not constrained by future labour shortages, continued efforts by Bruce County and its public- and private-sector partners will be required to accommodate new skilled and unskilled working residents to the County across a broad range of housing options by type, tenure and price. Attraction efforts must be geared to affordable housing accommodations (both ownership and rental), urban amenities as well as quality of life attributes which appeal to a younger mobile population, while not detracting from the County’s attractiveness to older population segments.

### 2.2.3. Near-Term Regional Impacts of COVID-19 on Population and Employment Growth

To date, the downward impacts of COVID-19 on global economic output have been severe. Economic sectors such as travel and tourism, accommodation and food, manufacturing, energy and finance have been hit particularly hard. Canada’s Gross Domestic Product (GDP) declined by approximately 39% in the second quarter of 2020 (April to June) and rebounded by 40.5% in the third quarter of 2020.<sup>6</sup>

Overall, required modifications to social behavior (i.e. physical distancing) and increased work at home requirements, resulting from government-induced containment measures and increased health risks, have resulted in significant economic disruption largely related to changes in consumer demand and consumption patterns. Furthermore, escalating tensions and constraints related to international

<sup>5</sup> Four County Labour Market Planning Board, 2019. Employer One Survey Observations 2019.

<sup>6</sup> Reuters Business News, August 28, 2020.

trade have also begun to raise further questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

At the current time, the level of sustained economic impact related to this “exogenous shock” to the world and Canadian economy is largely unknown. Notwithstanding this uncertainty, it is generally clear that the longer COVID-19 persists on an international scale, the greater the severity of the current global recession. Despite the longer-term consequences of COVID-19 to some industries, firms and individuals, the long-term economic outlook for southwestern Ontario remains generally positive and the region is anticipated to continue to be attractive to newcomers who represent a key driver of population growth to this region.

While the housing market across southwestern Ontario got off to a relatively slow start in early 2020 due to COVID-19, pent-up demand and historically low mortgage rates have accelerated demand across this region in recent months. Notwithstanding the recent rebound in real estate trends identified for southwestern Ontario, including Bruce County, there are a number of reasons to remain cautious with respect to the demand for housing across the broader region over the near term (i.e. the next one to three years).

A recent report released by Royal Bank of Canada (RBC) Economics identifies that on-going border restrictions, travel-related health fears and the global economic downturn are expected to reduce immigration levels sharply in 2020.<sup>7</sup> The RBC report also points out that while temporary foreign workers are exempt from entry restrictions, fewer are coming to Canada due to logistical and financial burdens related to COVID-19 work restrictions and isolation requirements. After the COVID-19 crisis, economists warn that immigration may remain relatively low compared to recent years, because relatively higher unemployment rates during the post-COVID-19 economic recovery period in Canada may reduce the incentive for immigrants coming into the Country.<sup>8</sup> This near-term scenario has the potential to reduce population growth levels and soften the housing market in areas of Ontario where population growth is most heavily dependent on immigration. The Province’s largest urban centres are most heavily dependent on immigration as a primary source of population growth and would potentially be the most heavily impacted by such a trend.

In contrast to the Province’s largest urban centres, population and housing growth in Bruce County is largely driven by net migration from other areas of the Province, as opposed to immigration. For Bruce County, COVID-19 has acted as a near-term driver of future housing growth led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade “city lifestyles” for “smaller town living.” It is recognized, however, that the longer-term population and employment growth potential for Bruce County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to

<sup>7</sup> RBC Economics. Current Analysis. COVID-19 Derails Canadian Immigration. May 29, 2020.

<sup>8</sup> Stalling immigration may add to Canada’s COVID-19 economic woes. Fergal Smith, Steve Scherer. Reuters. May 27, 2020.



overstate the near-term impacts of COVID-19 on housing demand in Bruce County over the long term.

In addition to its local and broader impacts on the economy, COVID-19 is also anticipated to accelerate changes in work and commerce as a result of technological disruptions which were already in play prior to the pandemic. As such, enterprises will increasingly be required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks (VPNs), virtual meetings, cloud technology and other remote work collaboration tools.

Over the 2001 to 2016 period, the percentage of Bruce County's labour force defined as having a usual place of work declined, offset by a gradual increase in the share of work at home employment and a steady increase in the share of off-site employment or employees with no fixed place of work (NFPOW).<sup>9</sup> Technological innovation and improved broadband telecommunications have been and will continue to be, key drivers of economic expansion in knowledge-based sectors geared towards work-at-home, as well as the steady rise of the gig economy.<sup>10</sup>

In November 2020, the Province of Ontario announced that \$16 million has been invested to support broadband infrastructure within Bruce County that is expected to service 5,220 more homes and businesses.<sup>11</sup> It is anticipated that many working residents in Bruce County, particularly younger adults as well as older adults (i.e. Baby Boomers) approaching retirement or semi-retirement will utilize technology to supplement their income in more flexible ways in contrast to traditional work patterns.

These trends are anticipated to have a direct influence on commercial and industrial real estate needs over both the near and longer terms. In light of these anticipated trends, it is important that long-term employment forecasts adequately consider the manner in which these impacts are likely to influence the nature of employment by place of work and associated building space needs by sector.

#### **2.2.4. Longer-Term Impacts of Technological Disruption and Innovation on Economic Development and Labour Force Trends**

Over the long term, labour force growth potential across the national, provincial, regional and local levels will be directly influenced by continued structural changes and disruptions driven by technology, automation and artificial intelligence (AI). According to the Brookfield Institute for Innovation + Entrepreneurship, over the next 10 to 20 years, 42% of the Canadian labour force is at high risk of being affected by

<sup>9</sup> Statistics Canada defines NFPOW employees as “persons who do not go to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”

<sup>10</sup> The gig economy is characterized by flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform.

<sup>11</sup> Delivering Broadband in Bruce and Grey Counties. Ontario Newsroom. November 17, 2020.

automation, either through significant task restructuring or elimination. Jobs that are anticipated to be most highly impacted by automation are primarily within occupations that are administrative, routine, or oriented towards sales and service.

While the long-term net economic impacts of automation and/or artificial intelligence (AI) appear to be positive, global competition from both established and emerging markets looking to capitalize on potential opportunities related to this technology will be increasingly fierce.<sup>12</sup> Building on its strong institutional and community foundations, Bruce County has the ability to influence its readiness towards an ever-evolving knowledge-based economy through on-going leadership and investment. Ultimately, these efforts are important to enhance youth in-migration, talent attraction and local employment opportunities geared towards an increasingly skilled labour force.

### 2.2.5. The Impacts of an Aging Bruce County Population

It is important to recognize that the population base of Bruce County is older on average and aging at a slightly faster rate relative to the Province as a whole. The County's 55+ age group has grown considerably over the past 25 years and is expected to increase in both percentage and absolute terms over the next several decades, largely due to the aging of the County's Baby Boom population. The aging of the County's population base is anticipated to place downward pressure on the rate of population and labour force growth within the County given declining population growth resulting from natural increase (i.e. births less deaths) combined with downward pressure on the regional labour force participation rate.<sup>13</sup>

Similar to the Province as a whole, the County will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions. It is important to recognize these demographic trends, as they are anticipated to constrain the rate of population and economic growth expected across the County over the next several decades.

It is also important to acknowledge that forecast population growth rates are not anticipated to be homogenous across the County's urban and rural areas. Throughout the County's rural areas, population growth is anticipated to be slow over the next several decades in areas that are experiencing limited new housing development. Due to declining housing occupancy levels associated with aging residents, population growth may also be slow or even negative in some settlement areas (e.g. villages and hamlets).

<sup>12</sup> The net impacts to global GDP resulting from AI are anticipated to contribute up to \$15.7 trillion to the global economy in 2030, more than the current output of China and India combined.<sup>12</sup> Sizing the Prize. PricewaterhouseCoopers. 2017.

<sup>13</sup> The labour force participation rate is calculated by dividing the total labour force by the population 15 years and older.

In certain cases, the aging population base is also anticipated to place increasing development pressures on the County's Primary and Secondary Urban Communities. For example, the aging of the County's population is anticipated to drive the need for seniors' housing and other housing forms geared to older adults (e.g. assisted living, affordable housing, adult lifestyle housing), that are not available or cannot be provided for in smaller communities and the surrounding rural area.

Given the diversity of the 55-74 and 75+ population age groups, forecast housing demand across Bruce County within this broad 55+ demographic group is anticipated to vary considerably. Within the 55+ age group, housing demand from the 55-74 population is anticipated to be relatively strong for ground-oriented housing forms (i.e. single detached, semi-detached and townhouses) provided in locations that offer proximity to urban amenities, municipal services and community infrastructure. With respect to the 75+ population, the physical and socio-economic characteristics of this age group (on average) are considerably different from those of younger seniors, empty nesters and working adults with respect to income, mobility and health. Typically, these characteristics represent a key driver behind the increased propensity of the 75+ population age group for medium- and high-density housing forms (including seniors' housing) that are in proximity to municipal and community services (e.g. health care services) as well as other community facilities which typically attract this age group.

### 2.2.6. Quality of Life

Quality of life is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in relocation decisions. Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences. As previously identified, the urban and rural character of Bruce County offers a high quality of life which is expected to drive net migration from a broad range of demographic groups, including first-time home buyers, families, empty nesters and seniors.

### 2.2.7. Seasonal Growth Opportunities

It is important to recognize the weight the seasonal segment of the population has on future housing demand, infrastructure needs, economic development and municipal services. Market demand for seasonal housing is largely anticipated to be driven from residents within the GGH and to a lesser extent other larger urban centres within southern Ontario located within a two- to three-hour drive of Bruce County's waterfront and rural areas.

## 2.3 Overview of Macro-Economic Outlook and Regional Employment Trends

The following section provides a summary of the macro-economic conditions influencing Provincial and regional employment trends within Bruce County over much of the past two decades. It is noted that historical time periods examined within this chapter vary due to data availability.

### 2.3.1. Trends in the Provincial Economy

#### 2.3.1.1 Ontario Gross Domestic Product (GDP) Outlook within the Canadian Context

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by GDP output, has shifted from goods-producing sectors (i.e. manufacturing and primary resources) to services-producing sectors. This has largely been driven by GDP declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn. As previously noted, GDP declines in the manufacturing sector had begun to show signs of stabilization over the past several years, prior to the recent global recession of 2020.

Over the past decade, the Ontario economy experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding from 2013 to 2018, as illustrated in Figure 3-1. As previously mentioned, this economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar and the gradual strengthening of the U.S. economy.<sup>14</sup> Growth in 2019 eased to 1.6%, largely as a result of a tightening labour market and slowing global economic growth.<sup>15</sup>

While the recent performance of the Ontario economy has remained relatively strong over the past several years through to early 2020, the COVID-19 pandemic poses significant risks to the national and provincial economies that are important to recognize. As illustrated in Figure 3-1, the Ontario economy was estimated to contract by 4.2% in 2020, however a rebound in GDP of 3.7% is forecast for -2021.<sup>16</sup>

Domestically, the Ontario housing market also continues to pose a risk to the overall economy, which is important to recognize when considering forecast labour force and employment growth trends. The sharp rise in Ontario's housing prices, particularly in the GTHA, has contributed to record consumer debt loads and eroding housing affordability. As previously noted, the long-term impacts of COVID-19 on the regional and local housing markets are largely unknown at present. Over the long term, the

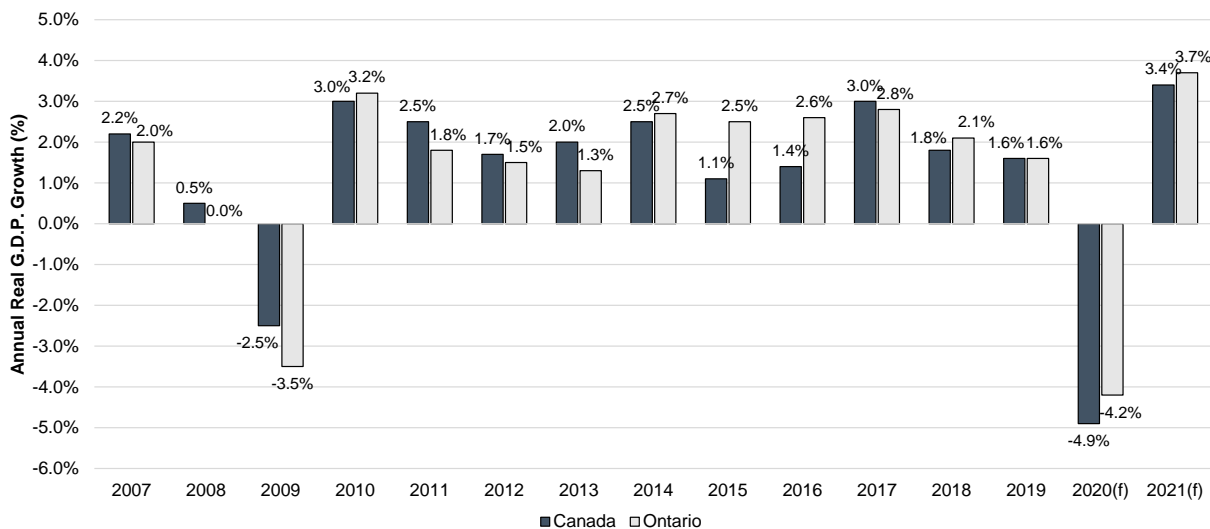
<sup>14</sup> Valued at approximately \$0.74 U.S. as of July, 2020.

<sup>15</sup> BMO Provincial Outlook, Spring 2019.

<sup>16</sup> COVID-19 Recession Deepens Fast from Coast to Coast. RBC Economics. April 13, 2020.

broader outlook for the Ontario housing market remains positive, but subject to significant variation at the regional level.

Figure 2-6  
Annual Real GDP Growth, Ontario and Canada  
Historical (2007 to 2019) and Forecast (2020 to 2021)



Source: 2007 to 2018 derived from B.M.O. Capital Markets Economics, Provincial Economic Outlook, and 2019 to 2021 from RBC Economics Provincial Outlook - Update, April 2020, by Watson & Associates Economists Ltd.  
Note: 2020 to 2021 are forecast by RBC Economics.

### 2.3.2. The Stratford-Bruce Peninsula Economic Region Labour Force Trends

Forecast population growth potential within Bruce County is directly tied to the economic outlook and competitive position of Ontario and beyond. Future provincial economic growth potential directly influences the number of intra-provincial and inter-provincial migrants and international migrants, who are attracted to Ontario for employment opportunities.

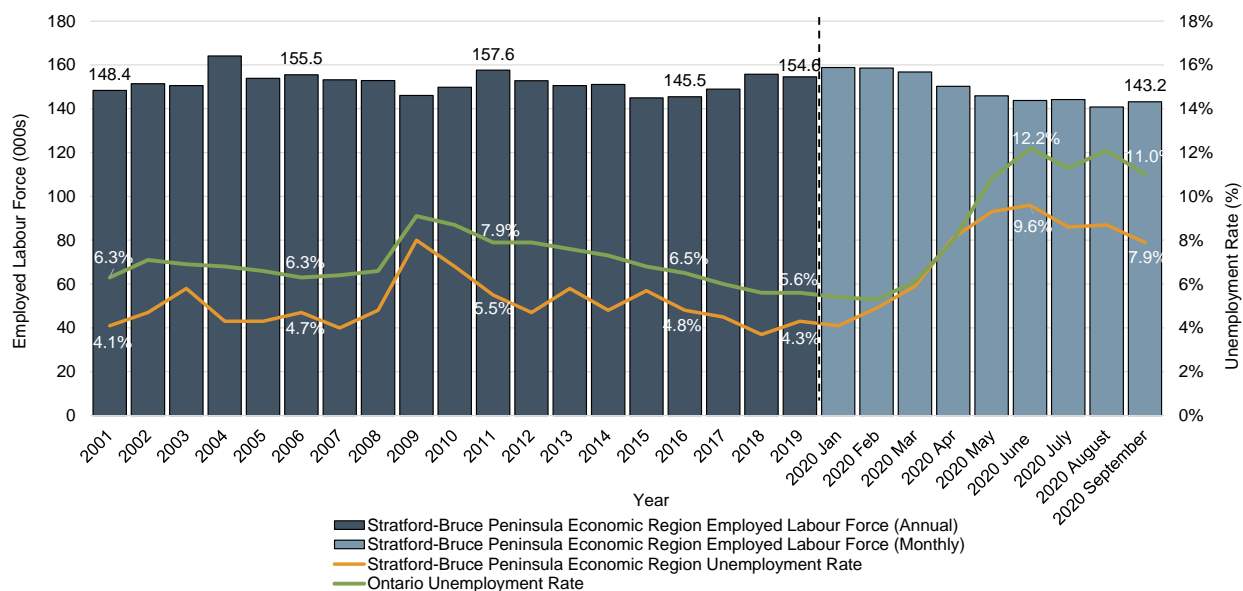
Figure 2-7 summarizes labour force growth trends over the past 19 years (2001 to September 2020) for the Stratford-Bruce Peninsula Economic Region.<sup>17</sup> Between 2001 to 2019, the Economic Region has experienced slow labour force growth with an annual average growth rate of 0.2%. Labour force growth rates declined between 2001 and 2016, with post-2016 labour force growth notably stronger across the Economic Region.

Historically, average unemployment rates across the Stratford-Bruce Peninsula Economic Region have been below the provincial average since 2001. As displayed, labour force growth in 2020 has sharply declined because of COVID-19. Unemployment

<sup>17</sup> The Stratford-Bruce Peninsula Economic Region includes the Counties of Bruce, Grey, Huron and Perth.

rates within the Economic Region have increased within the first half of 2020 but have declined since June 2020. It is noted that provincial containment measures imposed across this economic region since late December 2020 are anticipated to place upward pressure on the regional unemployment rate in Q1 of 2021.

Figure 2-7  
Stratford-Bruce Peninsula Economic Region 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.

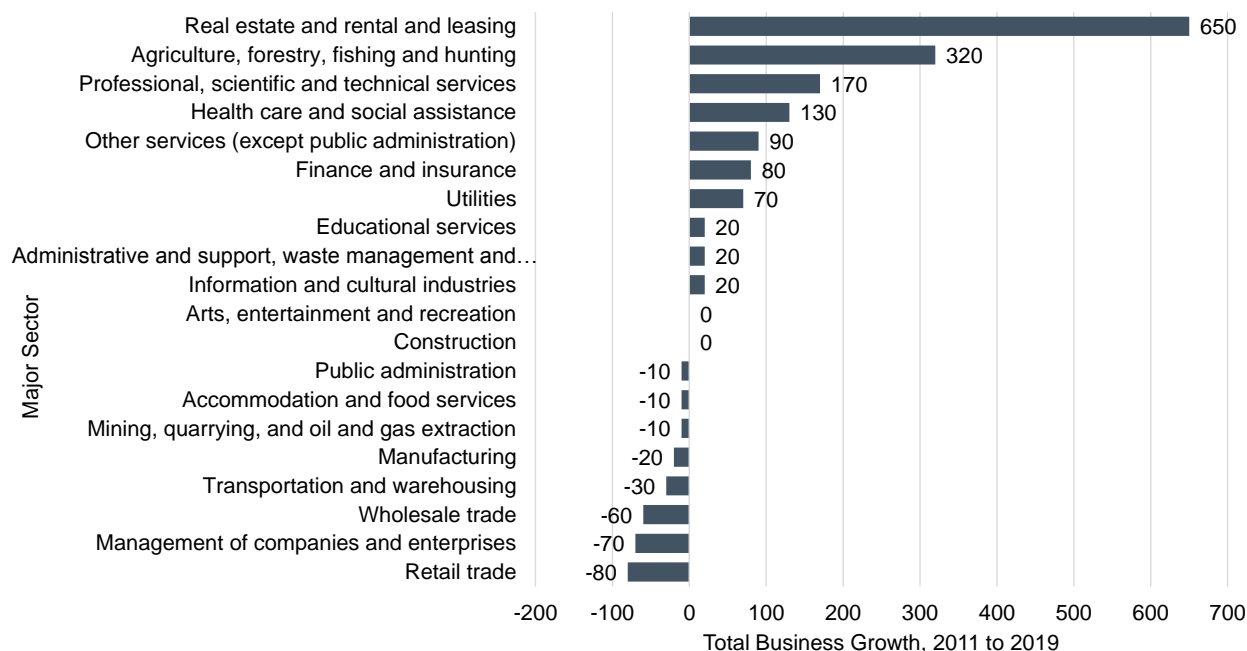
## 2.3.3. Overview of Bruce County Economic Trends

### 2.3.3.1 Employment by Place of Work and Sector

Figure 2-8 summarizes business change by industry sector over the 2011 to 2019 period in Bruce County. As shown, the fastest growing business sectors were primarily in knowledge-based or “creative class” sectors as well as agriculture. Notably, there was a sharp decline in businesses operating in the retail trade and wholesale trade sectors.



Figure 2-8  
Bruce County  
Average Annual Employment Growth by Sector, 2001 to 2016



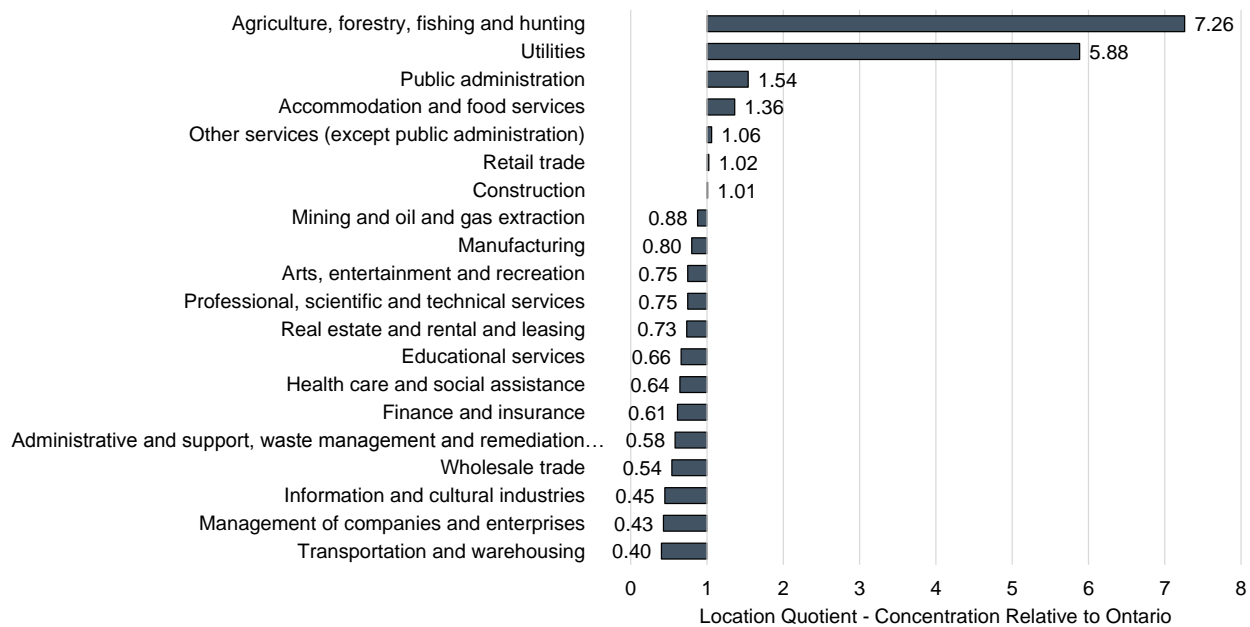
Source: 2011 and 2019 Canada Business Count data, by Watson & Associates Economists Ltd., 2020.

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

### 2.3.3.2 Industry Clusters in Bruce County

Figure 2-9 illustrates the strength of business sectors in Bruce County relative to the Province of Ontario using Location Quotients (LQ). An LQ of 1.0 identifies that the concentration of businesses by sector is consistent with the broader business base average. An LQ of greater than 1.0 identifies that the concentration of businesses in a given sector is higher than the broader base average, which suggests a relatively high concentration of a particular business sector or “cluster.” As shown, Bruce County’s business base is largely oriented towards agriculture, forestry, fishing and hunting; utilities; public administration; and accommodation and food services. Bruce has a relatively lower concentration of businesses in transportation and warehousing; management of companies and enterprises; and information and cultural industries.

Figure 2-9  
Bruce County  
Location Quotient Relative to Ontario, 2016



Source: Derived from Canada Business Patterns data by Watson & Associates Economists Ltd., 2018.

## 2.3.4. Bruce County Historical Housing Trends

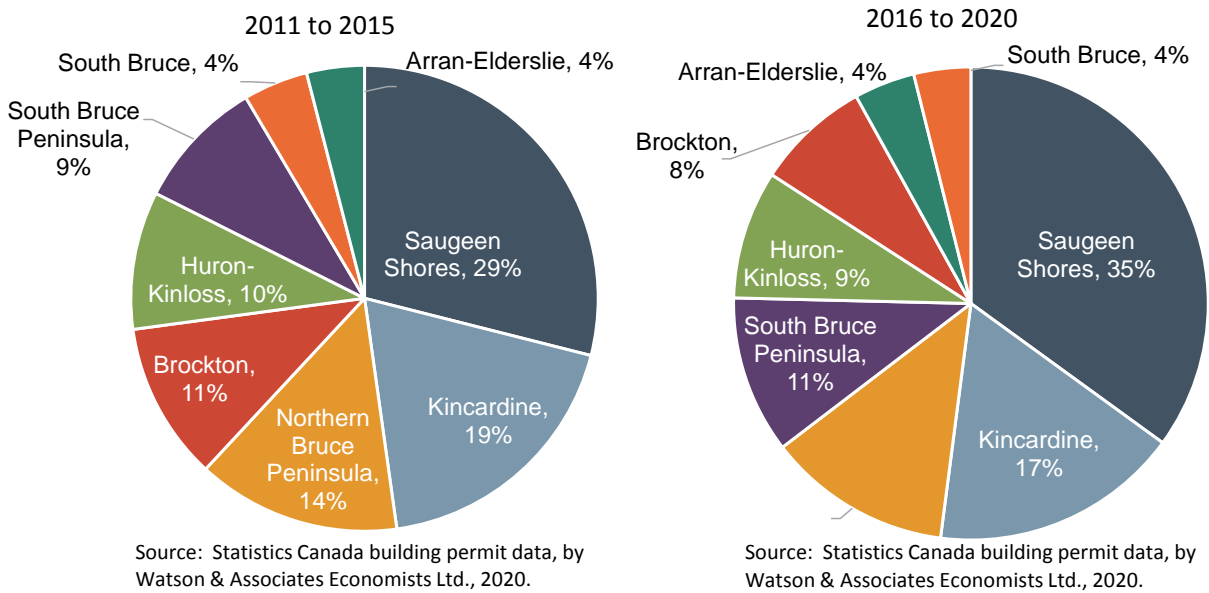
### 2.3.4.1 Historical Residential Building Permits Activity by Type, 2011 to 2020

Figure 2-10 summarizes the share of residential building permits<sup>18</sup> issued by unit type for new housing units from 2011 to 2020 within Bruce County by local municipality. Key findings include:

- Over the 2011 to 2020 period, Bruce County averaged 390 residential building permits per year;
- During the last five years, development activity was largely dominated by low-density units, accounting for 75% of units, while medium-density housing accounted for 12% of the remaining new units and high-density housing accounted for 13%; and
- Of the total building permits issued for new dwellings since 2016, approximately 35% were issued in Saugeen Shores, up from 29% between 2011 to 2015.

<sup>18</sup> Building permit figures are reflective of new units and do not account for demolitions.

Figure 2-10  
Bruce County  
Historical Residential Building Permits, 2011 to 2020



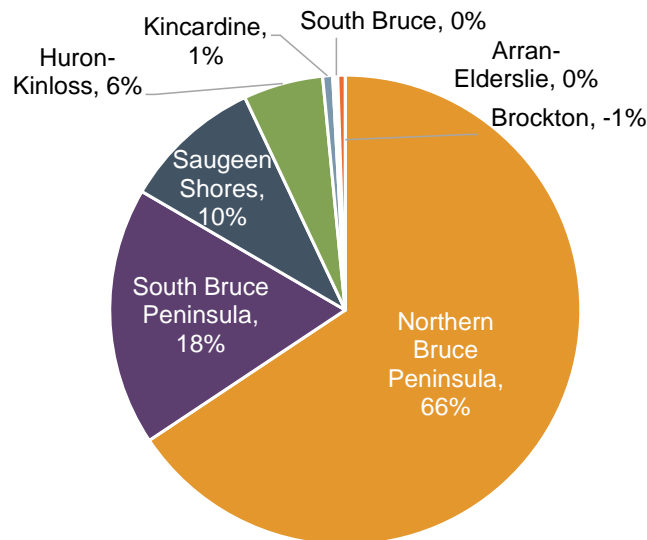
#### 2.3.4.2 Seasonal Housing Trends, 2011 to 2019

Figure 2-11 summarizes the share of seasonal dwelling growth<sup>19</sup> for each local municipality in Bruce County. The following trends can be observed:

- The majority of recent new seasonal housing development in Bruce County has occurred in Northern Bruce Peninsula with a County-wide share of 66%, representing an increase of 384 seasonal dwellings between 2011 and 2019; and
- South Bruce Peninsula and Saugeen Shores also experienced a moderate share of new seasonal housing development during this time, with 18% and 10% of seasonal dwelling growth, respectively.

<sup>19</sup> Net of seasonal conversions to permanent occupancy. <sup>20</sup> The Town of Saugeen Shores intensification potential has been analyzed within the Official Plan Review: Housing & Residential Growth Discussion Paper.

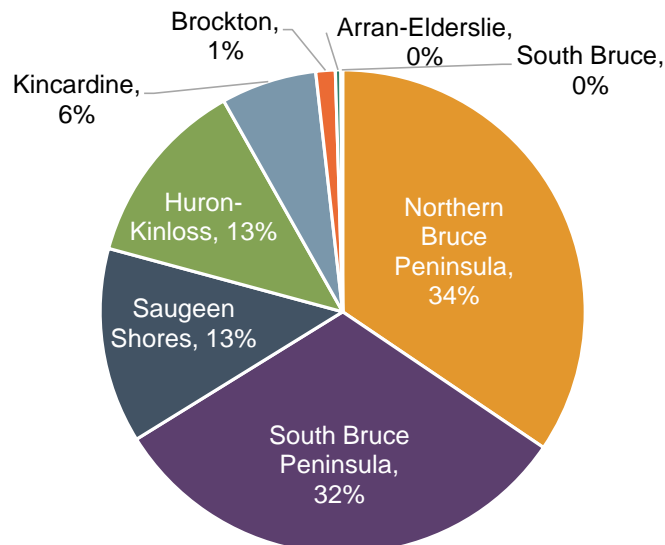
**Figure 2-11**  
Bruce County  
Seasonal Dwelling Growth by Local Municipality, 2011 to 2019



Source: 2011 and 2019 MPAC data, by Watson & Associates Economists Ltd., 2020.

Figure 2-12 summarizes the share of seasonal dwellings in Bruce County as of 2019. Similar to the seasonal unit growth trends, the 2019 base is also concentrated in Northern Bruce Peninsula and South Bruce Peninsula.

**Figure 2-12**  
Bruce County  
Seasonal Housing Base by Local Municipality, 2019



Source: 2019 MPAC data, by Watson & Associates Economists Ltd., 2020.

## 3 Residential and Non-Residential Supply Analysis

### 3.1 Introduction

This chapter summarizes the County's vacant housing and Employment Area supply within its Primary and Secondary Urban Communities. For each of the County's Urban Communities, future residential development opportunities are summarized by active development applications (i.e. registered, unbuilt, draft approved and applications under review), remaining inactive vacant designated greenfield areas and residential intensification opportunities.<sup>20</sup> Consideration has also been given to the County's ability to accommodate non-residential growth within its designated Employment Areas (i.e. industrial areas). Maps showing vacant residential and employment land supply have been provided in Appendix A.

### 3.2 Potential Future Housing Supply

The following section assesses the supply of designated urban residential lands with Bruce County's Primary and Secondary Communities to accommodate additional housing by local municipality and by status of planning approval. Additional details regarding the County's potential future housing supply by local municipality at the Primary and Secondary Community Area level are provided in Appendix A.

Figure 3-1 summarizes the County's potential future housing supply by local municipality as of mid-2020 (i.e. designated vacant residential lots and/or lands). This inventory includes identified housing units within the planning approvals process (i.e. active plans of subdivision) as well as potential housing supply located on inactive vacant designated greenfield areas and identified housing infill potential. Key observations are as follows:

- As shown in Figure 3-1, Bruce County has a total residential housing supply of approximately 16,570 units;
- Of the total housing supply, 21% is captured by units currently in the planning approvals process;
- As of mid-2020, 60% of the County's active housing supply within Primary and Secondary Urban Communities is identified as low-density unit, 25% as medium-density units and 15% as high-density units;
- Of the total housing supply for Bruce County, 79% of the housing unit potential (approximately 13,102) is located on designated vacant and inactive residential lands; and

<sup>20</sup> The Town of Saugeen Shores intensification potential has been analyzed within the Official Plan Review: Housing & Residential Growth Discussion Paper.

- Of these designated residential lands not in the development approvals process, Kincardine, Saugeen Shores and South Bruce Peninsula account for the largest share of housing unit potential.

Figure 3-1  
Bruce County  
Total Housing Potential

	Arran- Elderslie	Brockton	Huron- Kinloss	Kincardine	Northern Bruce Peninsula	Saugeen Shores	South Bruce	South Bruce Peninsula	Total Bruce County	Percentage of Housing Units
<b>Units in the Planning Process (Registered/Unbuilt/Draft Approved/Approved)</b>										
Singles & Semi-Detached	120	138	196	253	139	1,088	0	129	2,063	60%
Multiples	19	24	0	162	0	623	0	45	873	25%
Apartments	0	60	0	177	0	295	0	0	532	15%
<b>Total Potential Housing Units in the Development Approvals Process</b>	<b>139</b>	<b>222</b>	<b>196</b>	<b>592</b>	<b>139</b>	<b>2,006</b>	<b>0</b>	<b>174</b>	<b>3,468</b>	<b>100%</b>
Percentage of Housing Units	4%	6%	6%	17%	4%	58%	0%	5%	100%	
<b>Other Designated Lands</b>										
Singles & Semi-Detached	767	109	1,146	1,148	1,995	349	750	1,512	7,777	60%
Multiples	122	91	98	455	0	982	20	1,044	2,812	21%
Apartments	0	177	185	1,040	0	1,111	0	0	2,513	19%
<b>Total Potential Housing Units Not in the Development Approvals Process</b>	<b>888</b>	<b>377</b>	<b>1,430</b>	<b>2,643</b>	<b>1,995</b>	<b>2,442</b>	<b>769</b>	<b>2,556</b>	<b>13,102</b>	<b>100%</b>
Percentage of Housing Units	7%	3%	11%	20%	15%	19%	6%	20%	100%	
<b>Total Potential Housing Units</b>										
Singles & Semi-Detached	887	247	1,342	1,401	2,134	1,437	750	1,641	9,840	60%
Multiples	141	115	98	617	0	1,605	20	1,089	3,685	22%
Apartments	0	237	185	1,217	0	1,406	0	0	3,045	18%
<b>Total Potential Housing Units</b>	<b>1,027</b>	<b>599</b>	<b>1,626</b>	<b>3,235</b>	<b>2,134</b>	<b>4,448</b>	<b>769</b>	<b>2,730</b>	<b>16,570</b>	<b>100%</b>
Percentage of Housing Units	6%	4%	10%	20%	13%	27%	5%	16%	100%	

Source: Data from Bruce County Planning Department, derived by Watson & Associates Economists Ltd., 2020.

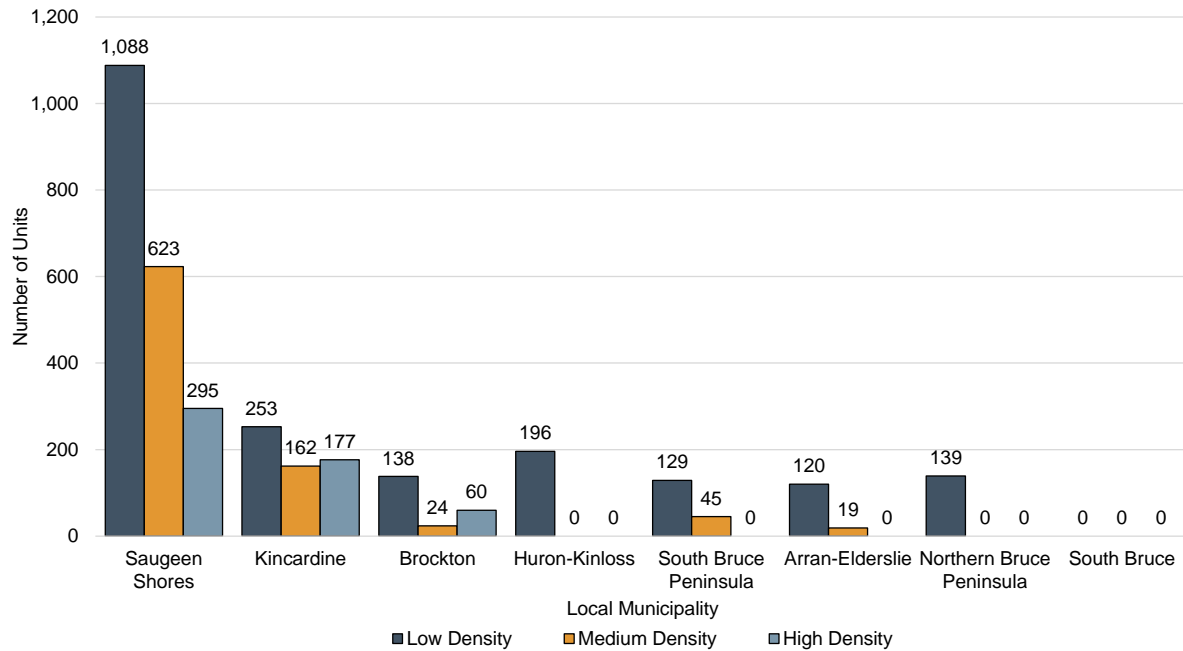
### 3.2.1. Residential Supply in the Development Approvals Process

Figure 3-2 summarizes the County's housing supply in the development approvals process by local municipality as of mid-2020. Local municipal totals represent all housing units in the development approvals process that are located within designated Primary and Secondary Urban Communities. Key observations are as follows:

- Of the County's 3,500-unit total potential housing supply in the development approvals process, 58% has been identified within Saugeen Shores;
- Most the County's active medium- and high-density units are also located within Saugeen Shores; and
- The largest share of the County's remaining active housing supply outside Saugeen Shores is located in Kincardine with a total of just under 600 potential households in active residential plans.

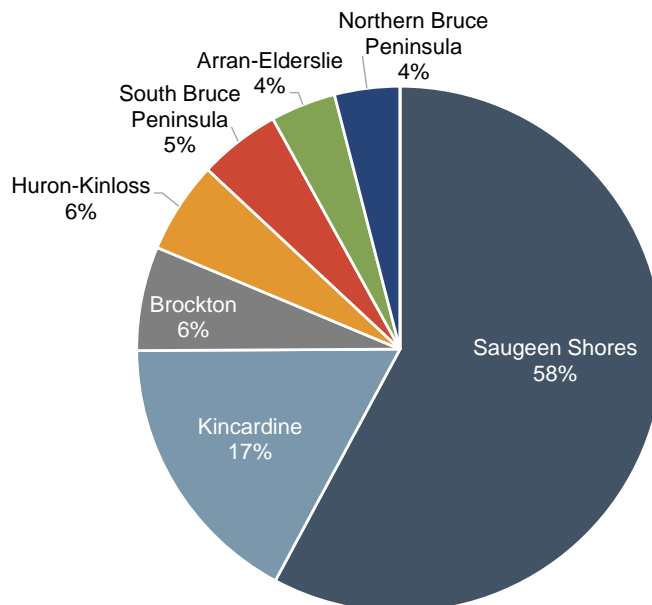


**Figure 3-2**  
Bruce County  
Residential Units in the Development Approvals Process



Source: Derived from data provided by Bruce County by Watson and Associates Ltd., 2020.

**Figure 3-3**  
Bruce County  
Share of Residential Units in the Development Approvals Process by Local Municipality



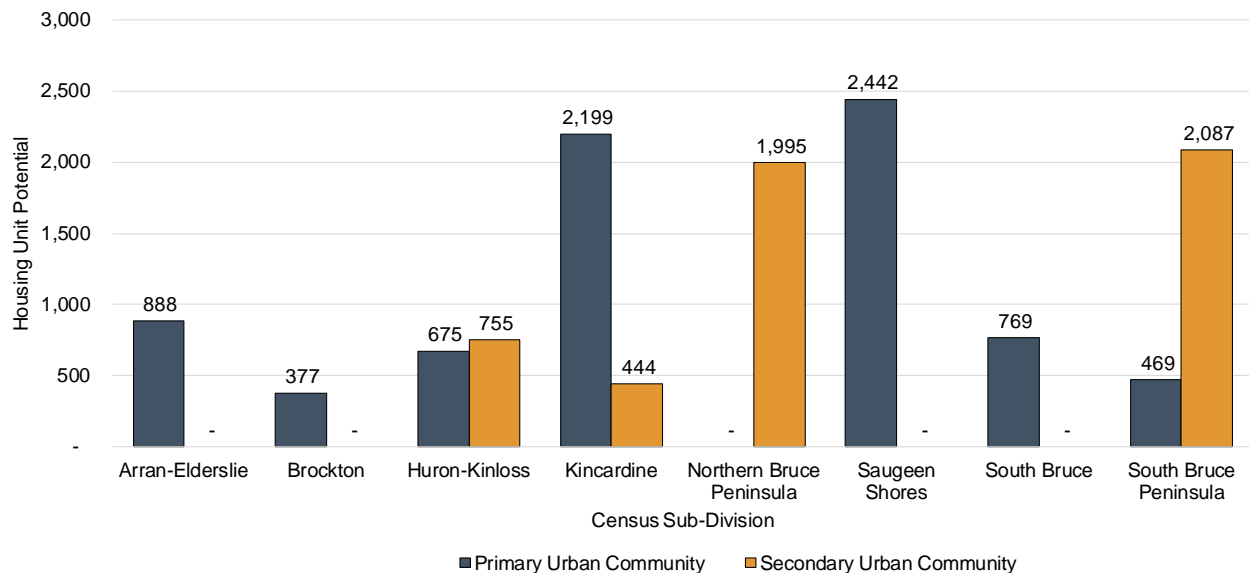
Source: Derived from data provided by Bruce County by Watson & Associates Economists Ltd., 2020.

### 3.2.2. Vacant Residential Supply

Figures Figure 3-4 and Figure 3-5 summarize the County's housing supply on inactive greenfield lands by local municipality as of mid-2020. Local municipal totals represent all units outside the development approvals process that fall within designated Primary and Secondary Urban Communities. Housing unit totals are derived from a review of vacant designated lands by local municipality.<sup>21</sup> Key observations are as follows:

- The total residential housing supply within inactive greenfield lands across Bruce County's Primary and Secondary Urban Communities is approximately 13,100 units; and
- The distribution of housing unit potential on inactive greenfield lands is concentrated in Kincardine, South Bruce Peninsula and Saugeen Shores.

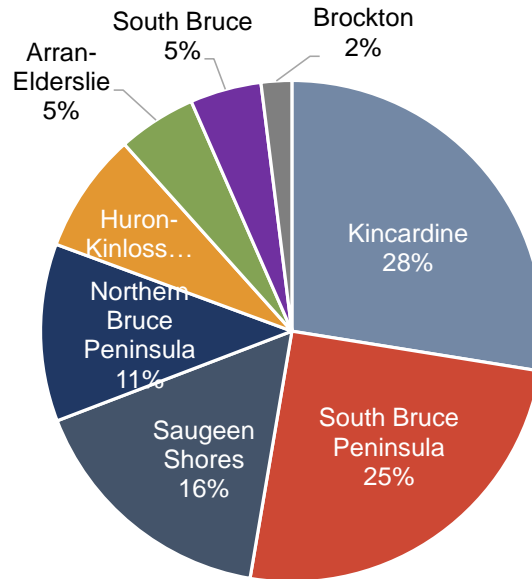
Figure 3-4  
Bruce County  
Housing Unit Potential on Vacant Lands within Primary and Secondary Urban Communities by Local Municipality



Source - Derived from data provided by Bruce County by Watson & Associates Economists Ltd., 2020.

<sup>21</sup> The number of housing units has been calculated based on the vacant residential land supply by Urban Community Area and the forecast unit mix (detailed further in County-Wide Population, Housing and Employment Growth Forecasts, 2016 to 2046). A density assumption for low-, medium- and high-density units has been considered to arrive at the estimated number of units.

Figure 3-5  
Bruce County  
Share of Unit Potential on Vacant Lands within Primary and Secondary Urban  
Communities by Local Municipality



Source: Derived from data provided by Bruce County by Watson & Associates Economists Ltd., 2020.

### 3.2.3. Residential Intensification Opportunities

To ensure Bruce County has sufficient land to meet housing needs to 2051 and beyond, efforts to facilitate residential intensification should be considered to reduce future land requirements. In accordance with the PPS, 2020, intensification is defined as:

The development of a property, site or area at a higher density than currently exists through:

- redevelopment, including the reuse of brownfield sites;
- the development of vacant and/or underutilized lots within previously developed areas;
- infill development; or
- the expansion or conversion of existing buildings.”

“Redevelopment is defined as:

The creation of new units, uses or lots on previously developed land in existing communities, including brownfield sites.”

A residential intensification supply inventory has not been prepared through this GMS. While this inventory has not been prepared, it is anticipated that there will be

opportunities for intensification in Primary and Secondary Urban Communities that are forecast to accommodate high density development. High density housing is comprised of the Statistics Canada Census categorizations of apartments with fewer or greater than five stories.

A large share of the County's high density intensification opportunities will be located within the Saugeen Shores Urban Community, similar to active subdivision plans and inactive greenfield supply. The Town of Saugeen Shores has the only Urban Community in Bruce County which contains an established built-up area (BUA). With the establishment of a BUA, the Town has defined intensification as housing growth within the BUA which "involves redeveloping, infilling or intensifying an area of existing development to accommodate a higher density."<sup>22</sup> The Town of Saugeen Shores has identified an intensification target of 10%. Chapter 7 of this report provides further planning policy direction regarding the establishment of residential intensification targets for each of the County's Primary and Secondary Urban Communities.

### 3.3 Non-Residential Supply Analysis

The County's vacant Employment Area land inventory was developed from the County's vacant industrial mapping layer and refined using Geographic Information System (GIS) based mapping software with various mapping overlays, including County OP designations and orthophotos. Vacant designated Employment Areas were identified as those within Primary and Secondary Urban Communities which also fall under the OP designation of "Industrial," "Employment" or "Business Park." Non-developable environmental lands were identified by Bruce County staff and were removed to determine the County-wide gross, developable vacant employment land supply.

#### 3.3.1. Vacant Employment Land Supply

Figures Figure 3-6 through Figure 3-9 summarize the total gross vacant land supply in Employment Areas across Bruce County (as of mid-2020) by Primary and Secondary Urban Community. As shown, the County has a total of 381 gross ha (941 gross acres) of vacant lands in Employment Areas. The following summarizes the key findings regarding the vacant Employment Area land supply:

- It is estimated that there are 381 gross ha (941 gross acres) of vacant designated urban employment lands in Bruce County;
- The majority of the designated urban employment parcels are less than one ha in size, yet most of the designated employment land supply is comprised of seven parcels greater than 10 ha; and

<sup>22</sup> Town of Saugeen Shores Official Plan Review: Housing & Residential Growth Discussion Paper. November 11, 2020.

- Kincardine has the greatest share of the vacant gross employment land supply with 76%.

**Figure 3-6**  
**Bruce County**  
**Gross and Net Vacant Employment Land Supply**

Municipality	Urban Community Area	Vacant Designated Employment Land Supply (Hectares)					
		Total Land Area (A)	Environmental Constraints Adjustment <sup>1</sup> (B)	Total Gross Land Area Adjusted for Environmental Constraints (C)	Adjustment for Roads and Other Internal Infrastructure <sup>2</sup> (D)	Net Developable Employment Land Supply (E = A-B-D)	Percentage of Net Vacant Employment Land Supply
Arran-Elderslie	Chesley	13	0	13	1	12	4%
	Tara	0	0	0	0	0	0%
Brockton	Walkerton	32	3	29	4	26	8%
Huron-Kinloss	Lucknow	0	0	0	0	0	0%
	Ripley	6	0	6	1	5	1%
Kincardine	Kincardine	71	23	48	7	41	13%
	Lakeshore	258	17	241	36	205	63%
South Bruce	Formosa	2	0	2	0	2	1%
	Mildmay	6	0	6	1	5	2%
	Teeswater	4	4	0	0	0	0%
South Bruce Peninsula	SBP - Urban	9	0	9	1	8	2%
Saugeen Shores	SS - Urban	14	0	14	4	10	3%
Northern Bruce Peninsula	Tobermory	12	0	12	2	10	3%
<b>Grand Total</b>		<b>428</b>	<b>48</b>	<b>381</b>	<b>57</b>	<b>324</b>	<b>100%</b>

Source: Derived from Bruce County GIS Data by Watson & Associates Economists Ltd. 2020

Note: Based on gross land area with takeouts in accordance with the Growth Plan, 2020

<sup>1</sup>Reflects environmental take-out of vacant employment lands encroached by environmentally sensitive lands identified as Natural Resources/Environment in the Official Plan Layers provided by the County

<sup>2</sup>Downward adjustment of 15% of the gross area (after environmental takeouts) has been applied to account for internal infrastructure on parcels greater than 1 ha in size

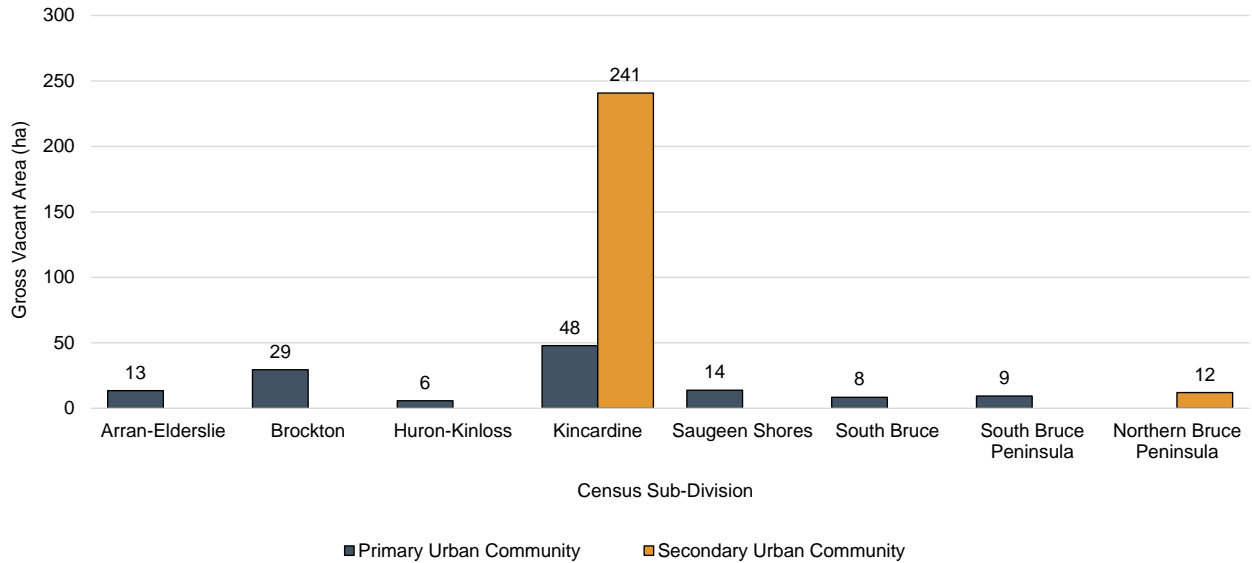
**Figure 3-7**  
**Bruce County**  
**Vacant Designated Employment Land Supply by Parcel Size**

Area Category	Number of Parcels	Gross Land Area (ha)	Share of Land Area
Less than 1 ha	47	12	3%
1 - 2 ha	12	20	5%
2 - 5 ha	24	68	18%
5 - 10 ha	9	59	15%
Greater than 10 ha	7	222	58%
<b>Grand Total</b>	<b>99</b>	<b>381</b>	<b>100%</b>

Source: Derived from data provided by Bruce County by Watson and Associates Economists Ltd.

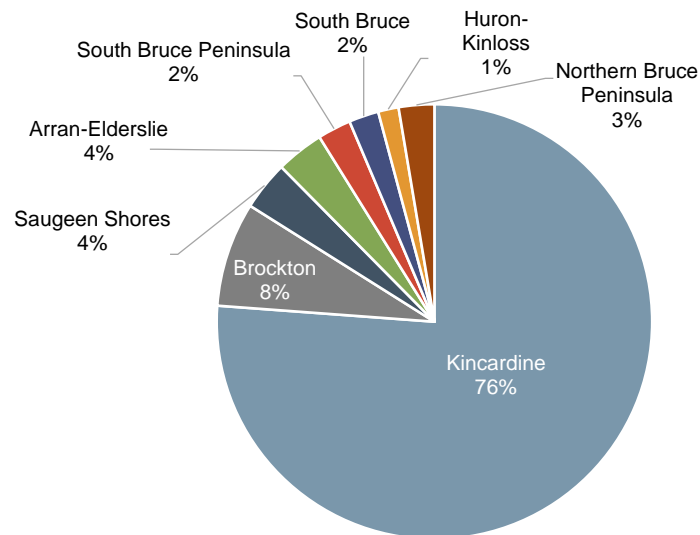
Note: Using Area Net of Environmental Features

**Figure 3-8**  
**Bruce County**  
**Gross Vacant Employment Land Supply by Urban Community Areas**



Source: Derived from Bruce County GIS Data by Watson & Associates Economists Ltd. 2020  
Note: Based on total land area after environmental takeouts applied.

**Figure 3-9**  
**Bruce County**  
**Share of Gross Vacant Employment Land by Municipality**



Source: Derived from Bruce County GIS Data by Watson & Associates Economists Ltd. 2020  
Note: Based on total land area after environmental takeouts applied.



### 3.3.2. Employment Area Intensification Opportunities

Intensification on employment lands can take a number of forms, including further development of underutilized and partially vacant lots (infill), expansion (horizontal or vertical) of existing buildings and redevelopment of employment land parcels. Intensification offers the potential to accommodate future employment growth and achieve increased land utilization resulting in higher employment density in existing Employment Areas. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g. roads, water/sewer servicing). While outside of the scope of this GMS, future analysis through the County's OP Review process could examine Employment Area intensification opportunities. Chapter 7 of this report provides further planning policy direction regarding Employment Area intensification for the County's Urban Communities.

## 4 County-Wide Population, Housing and Employment Growth Forecasts, 2016 to 2046

### 4.1 Introduction

In accordance with recent demographic, economic and socio-economic trends, as well as the growth drivers identified for the County, a long-term population, housing and employment forecast has been prepared and summarized below. In developing the County's long-term population forecast, consideration has also been given to the recent long-term population, housing and employment forecasts for the surrounding market area.

### 4.2 Bruce County Employment Growth Scenarios

Three long-term employment growth scenarios have been developed for Bruce County including a Low Scenario, Medium (Reference) and High Scenario as summarized in Figure 4-1.

#### *Low Employment Scenario*

The Low Scenario assumes that Bruce County employment will grow at an average annual growth rate of 0.8% per year. Under the Low Scenario, the Bruce County employment base is forecast to increase modestly between 2016 and 2046 by approximately 8,200 jobs from 29,800 to 38,000.

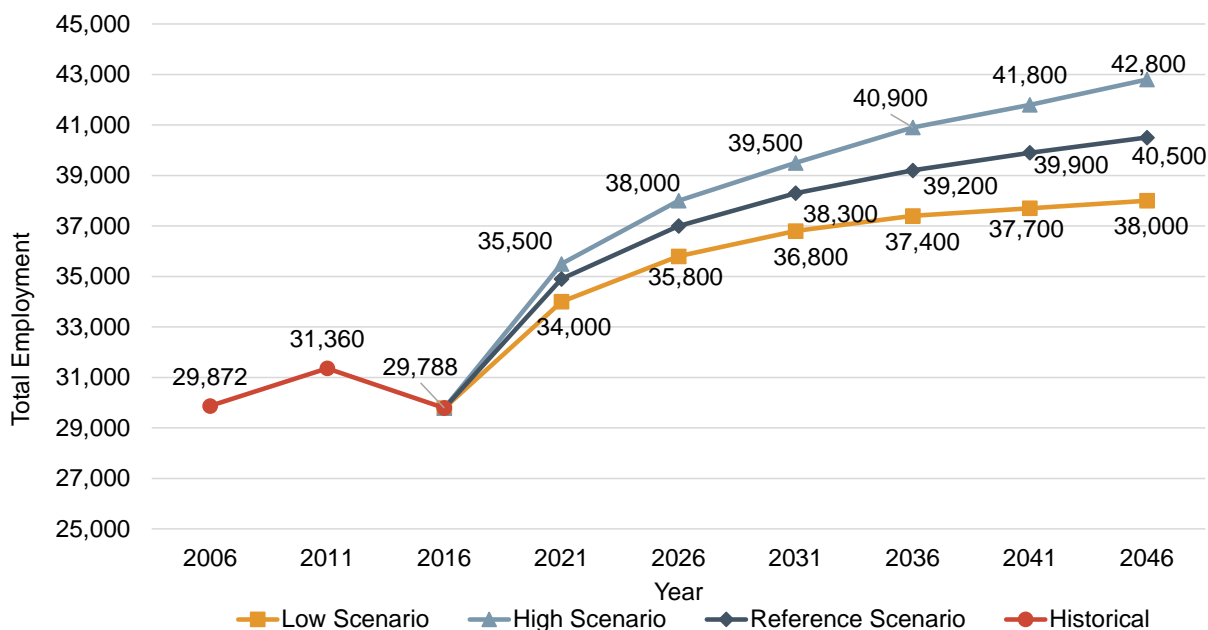
#### *Medium (Reference) Employment Scenario*

The Reference Scenario assumes an annual growth rate of approximately 1% for Bruce County between 2016 and 2046. This represents an average annual growth rate which is higher than the most recent 15-year historical period growth rate of 0.4% annually. Under the Reference Scenario, the Bruce County employment base is expected to increase by approximately 10,700 jobs by 2046.

#### *High Employment Scenario*

Under the High Scenario, Bruce County employment is forecast to grow at an average annual rate of roughly 1.2% per year. Under the High Scenario, Bruce County is anticipated to add approximately 13,000 jobs, increasing from 29,800 in 2016 to 42,800 by 2046.

Figure 4-1  
Bruce County  
Long-Term Total Employment Forecast Scenarios, 2016 to 2046



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

Note: Total employment includes no fixed place of work and work at home employment.

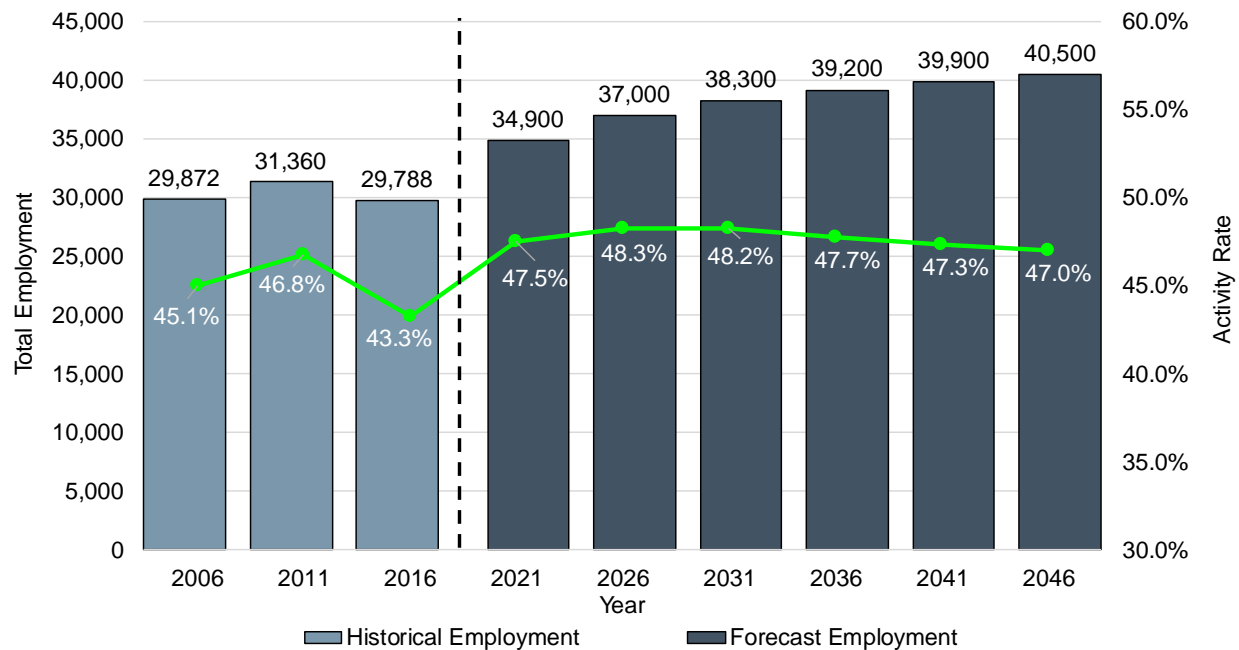
Bruce County Total Employment Growth					
	2016	2046	2016 to 2046	Annual Growth	Annual Growth Rate
High Scenario	29,800	42,800	13,000	433	1.2%
Base Case Scenario	29,800	40,500	10,700	357	1.0%
Low Scenario	29,800	38,000	8,200	273	0.8%

### 4.3 Bruce County Preferred Employment Forecast (Reference Scenario), 2016 to 2046

In accordance with the historical employment trends and forecast economic drivers identified, the Reference Scenario represents the preferred long-term employment growth scenario for Bruce County. The County's employment activity rate (ratio of jobs to population) has fluctuated over the past 10 years. Over the long term, the County's employment activity rate is anticipated to slowly increase from approximately 43.3% in 2016 to 47% by 2046. This moderate increase in the short term is anticipated to be largely driven by local employment opportunities associated with the Bruce Power refurbishment project as well as opportunities within the County's export-based employment sectors (e.g. transportation, wholesale trade, construction, small-scale manufacturing and agri-business). There is also job growth potential within population-related employment sectors such as retail, accommodation and food, professional, scientific and technical scientific services and health care. A large

percentage of forecast job growth is anticipated to be accommodated through home occupations, home-based businesses and off-site employment.

Figure 4-2  
Bruce County  
Historical and Forecast Employment Forecast, 2001 to 2046



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

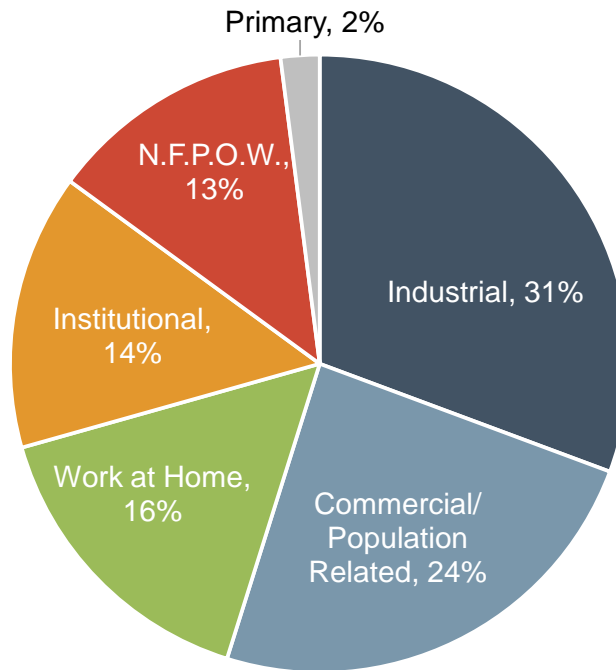
Source: 2001 to 2016 from Statistics Canada place of work data including work at home and no fixed place of work data.

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

#### 4.3.1. Forecast Employment Growth by Major Sector, 2016 to 2046

Moderate employment growth within Bruce County is expected across a range of sectors driven by the continued development of the regional and local economic base and local population growth. Figure 4-3 summarizes the 2016 to 2046 employment growth forecast by major employment sector for Bruce County. As summarized, the majority of employment growth in the County is anticipated in the industrial and commercial categories. These two sectors are expected to account for 55% of job growth between 2016 and 2046.

Figure 4-3  
Bruce County  
Share of Employment Growth by Sector, 2016 to 2046



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

With respect to employment growth by major employment sector, the following observations have been made:

- Primary Employment** - Primary industries (i.e. agriculture and other resource-based employment) comprise a minor component of the Bruce County employment base (approximately 3% in 2016). Looking forward, there is potential for expanded economic activity within the primary employment sector over the next several decades across Bruce County. This employment sector is anticipated to experience a net employment growth over the 2016 to 2046 forecast period of approximately 220 jobs.
- Industrial Employment** - The County's industrial sector is anticipated to increase by approximately 3,300 jobs over the 2016 to 2046 period, accounting for 31% of total County-wide employment growth. Industrial employment growth is anticipated to be concentrated in sectors related to utilities, small/medium-scale manufacturing, construction, wholesale trade and transportation and warehousing. Employment growth associated with the Bruce Power refurbishment project is largely captured within this employment category.

- **Commercial Employment** - Commercial/population-related employment (which includes the office and retail sectors) represents the County's second largest major sector with respect to total employment. This sector is largely driven by demand generated from the local population base, including seasonal residents. Commercial employment growth is forecast to increase by approximately 2,600 jobs over the 2016 to 2046 period, accounting for 24% of total employment growth.
- **Institutional Employment** - Bruce County is anticipated to add approximately 1,550 jobs to its institutional employment sector over the next 30 years, representing 14% of total employment growth. This includes employment growth in education, health and social services and other institutional facilities (i.e. cultural, religious). The County is expected to see an increase in seniors' health facilities and services, including retirement homes and assisted living facilities, as well as other institutional-related development due to a growing but aging population base.
- **Work at Home** - In 2016, work at home employment accounted for approximately 14% of all jobs within Bruce County. As the County's population and labour force continues to age, it is likely that an increased number of working and semi-retired residents will be seeking lifestyles that will allow them to work from home on a full-time or part-time basis. Over the forecast period, work at home employment in the County is expected to expand by approximately 1,700 jobs (16%), largely driven by forecast growth related to diversified on-farm uses, as well as service-sector employment, including knowledge-based occupations further enabled by improved telecommunications technology.
- **No Fixed Place of Work (NFPOW)** - Off-site employment accounted for 11% of jobs in 2016. This employment category is expected to continue to steadily grow within the County over the long term, largely driven by labour force demands in the construction and transportation, warehousing and business service sectors. Over the forecast period, NFPOW employment is expected to expand by approximately 1,390 jobs, 13% of the County's total employment forecast.

## 4.4 Bruce County Long-Term Permanent Population Growth Scenarios, 2016 to 2046

Building on the demographic and economic analysis provided in Chapter 2, a total of three long-term permanent population and housing forecasts have been prepared for Bruce County, including: 1) Medium (Reference) Scenario; 2) Low Scenario; and 3) High Scenario. A range of forecast population has been generated from these respective scenarios largely based on varying assumptions regarding annual net migration. Figure 4-4 graphically compares the two alternative long-term population growth forecasts for the County (i.e. the "high" and "low" cases) against the

Reference Scenario. It is noted that the long-term population growth scenarios include an upward adjustment of approximately 2.7% to account for the net Census undercount.<sup>23</sup>

### *Low Scenario*

Under the Low Scenario, it is assumed that the Bruce County permanent population base will grow at an average annual rate of 0.6% per year. This scenario assumes that average forecast net migration will decline relative to historical trends post-2021. Under the Low Scenario, Bruce County permanent population is forecast to increase moderately between 2016 and 2046 by 13,550, from 68,850 to 82,400, respectively.

### *Medium (Reference Scenario)*

Bruce County's permanent population is forecast to grow at an annual rate of approximately 0.75% under the Reference Scenario. This represents an average annual growth rate which is well above the historical growth rate of 0.4% achieved within Bruce County from 2001 to 2016. Population is expected to reach a 2046 total of 86,200, increasing by approximately 17,350 from 2016. Under this scenario, the rate of forecast population growth is anticipated to slow slightly in the latter half of the forecast period due to the aging of the County's population base.

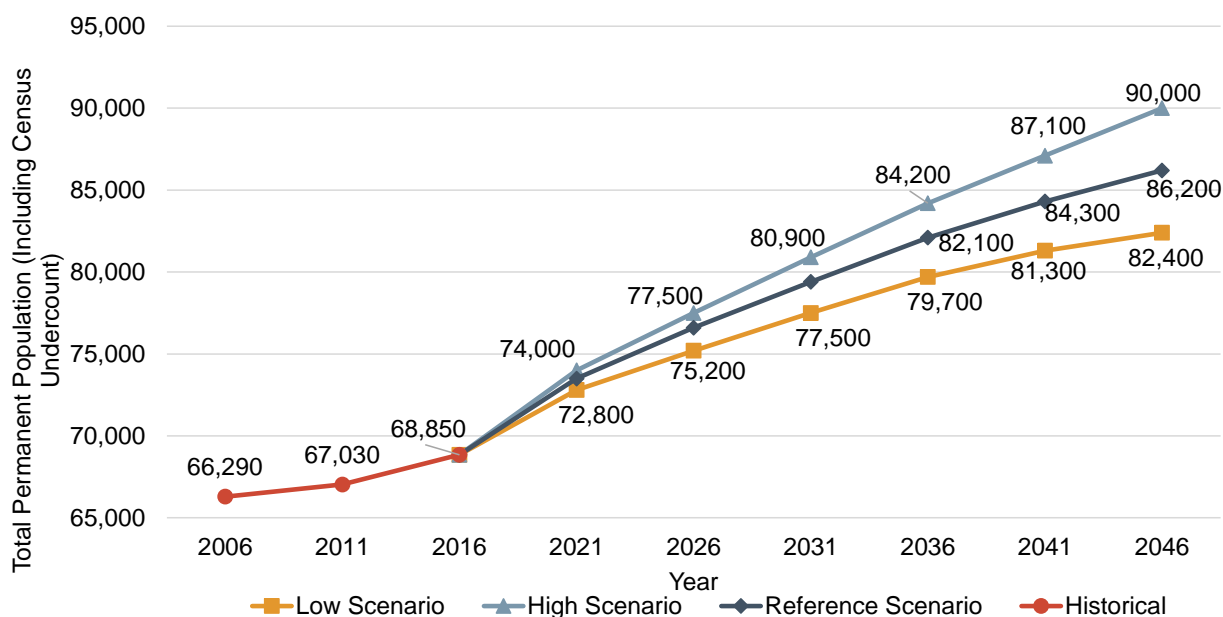
### *High Scenario*

Under the High Scenario, the County's permanent population is forecast to grow at an average annual rate of 0.9% per year. Under this scenario the permanent population of Bruce County is anticipated to grow by approximately 21,150 persons, increasing from 68,850 in 2016 to 90,000 by 2046.

<sup>23</sup> The Census undercount represents the net number of permanent residents who are missed (i.e. over-coverage less under-coverage) during Census enumeration in accordance with Statistics Canada. All provincial population forecasts prepared by the Ministry of Finance (MOF) and Ministry of Municipal Affairs and Housing (MMAH) include an upward adjustment for the net Census undercount.



Figure 4-4  
Bruce County  
Long-term Forecast Population Scenarios (Permanent Population), 2016 to 2046



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

Bruce County Total Permanent Population Growth					
	2016	2046	2016 to 2046	Annual Growth	Annual Growth Rate
High Scenario	68,850	90,000	21,150	705	0.90%
Base Case Scenario	68,850	86,200	17,350	578	0.75%
Low Scenario	68,850	82,400	13,550	452	0.60%

## 4.5 Preferred Permanent Population and Housing Growth Scenario

### 4.5.1 Preferred Permanent Population Forecast

Each Growth Scenario described above is based on a range of assumptions related to total net migration, net migration by age, births and deaths. As previously discussed, forecast net migration is largely driven by growth in the local and regional economies, as well as the County's attractiveness to empty nesters and seniors. In turn, population growth creates demand for new housing across the County, which is then allocated by local municipality (refer to Allocation of Population, Housing and Employment Growth Forecasts by Local Municipality to the Year 2046). The growth forecast model adopted herein allows these various growth inputs to be adjusted to test the sensitivity of inputs and the reasonableness of the outputs against historical growth trends and the identified growth drivers.

The permanent population scenarios represent the potential range of future growth which can be anticipated for the County over the next 30 years. Based on our review, the Reference (Medium) Scenario represents the most reasonable growth forecast scenario for Bruce County for the following reasons:

1. It represents a reasonable future ratio of population relative to the surrounding Counties in comparison to historical and forecast trends;
2. The level of population growth in the 15-64 population age group is reasonable given forecast job growth in the local and regional economy;
3. Forecast net migration levels are relatively comparable to historical trends over the past 15 years. Forecast net migration trends are reflective of steady growth in the local and regional economy plus the attractiveness of the County to empty nesters and young seniors as a retirement/semi-retirement destination; and
4. The forecast level of annual housing growth required to accommodate the Reference Growth Scenario are reasonable in relation to historical trends observed based on residential building permit data, Statistics Canada Census data and MPAC data.

Figure 4-5 summarizes the preferred population growth forecast for Bruce County from 2016 to 2046 in five-year increments.

Figure 4-5  
Bruce County  
Population Growth Forecast, 2016 to 2046

Year		Population (Including Census undercount)	Population Excluding Census Undercount
Historical	Mid-2006	66,300	64,000
	Mid-2011	67,000	64,700
	Mid-2016	68,900	66,500
Forecast	Mid-2021	73,500	71,600
	Mid-2026	76,600	74,600
	Mid-2031	79,400	77,400
	Mid-2036	82,100	80,000
	Mid-2041	84,300	82,100
	Mid-2046	86,200	83,900
Incremental	Mid-2006 to Mid-2011	700	700
	Mid-2011 to Mid-2016	1,900	1,800
	Mid-2016 to Mid-2021	4,600	5,100
	Mid-2016 to Mid-2026	7,700	8,100
	Mid-2016 to Mid-2031	10,500	10,900
	Mid-2016 to Mid-2036	13,200	13,500
	Mid-2016 to Mid-2041	15,400	15,600
	Mid-2016 to Mid-2046	17,300	17,400

Source: Data from 2006 to 2016 from Statistics Canada Demography Division by Watson & Associates Economists Ltd., 2020.

#### 4.5.2 Permanent Population Forecast by Age Cohort

Figure 4-6 through Figure 4-7 summarize the population growth forecast by major age group over the 2016 to 2046 period for Bruce County. Key observations are as follows:

- The percentage of population in the 0-19 age cohort (youth population) is forecast to gradually decline from 21% in 2016 to 20% in 2046;
- The population share associated with the 20-54 age group is forecast to decline from 39% in 2016 to 32% in 2046;
- The 55-74 age group (empty nesters/younger seniors) is forecast to decline from 31% in 2016 to 26% in 2046; and
- The percentage of the population in the 75+ age group (older seniors) is forecast to more than double over the 25-year period, from 9% in 2016 to 21% in 2046.

Figure 4-6  
Bruce County  
Population by Age Forecast, 2016 to 2046

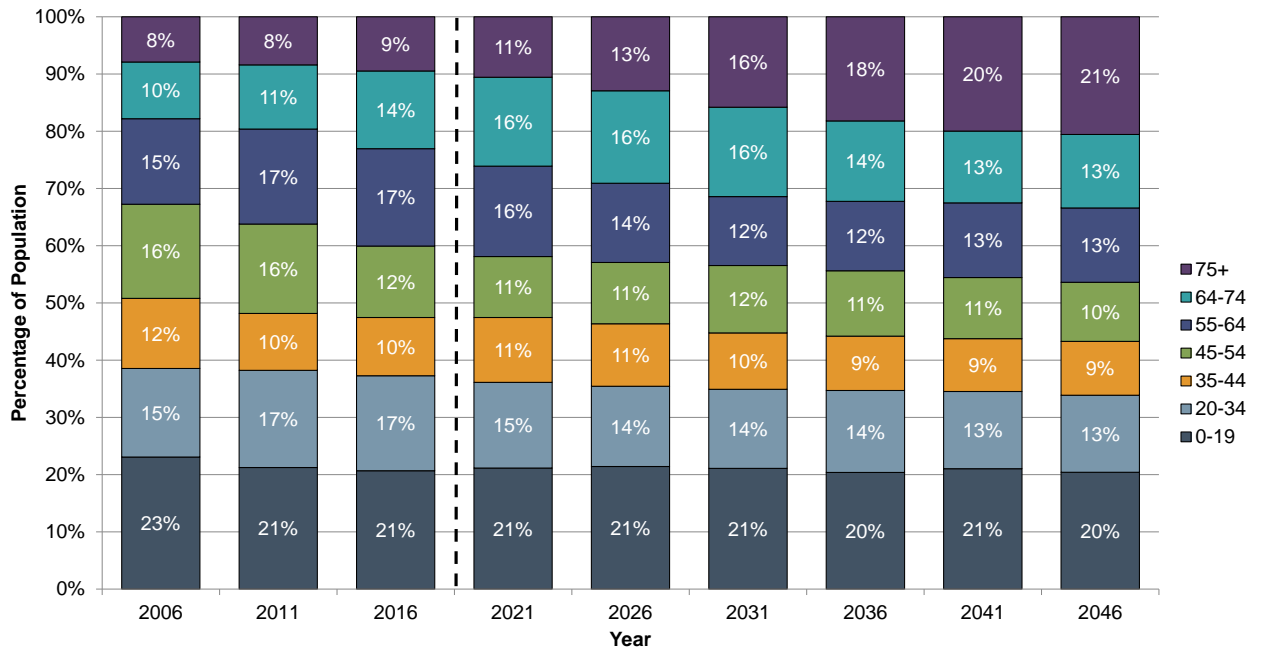
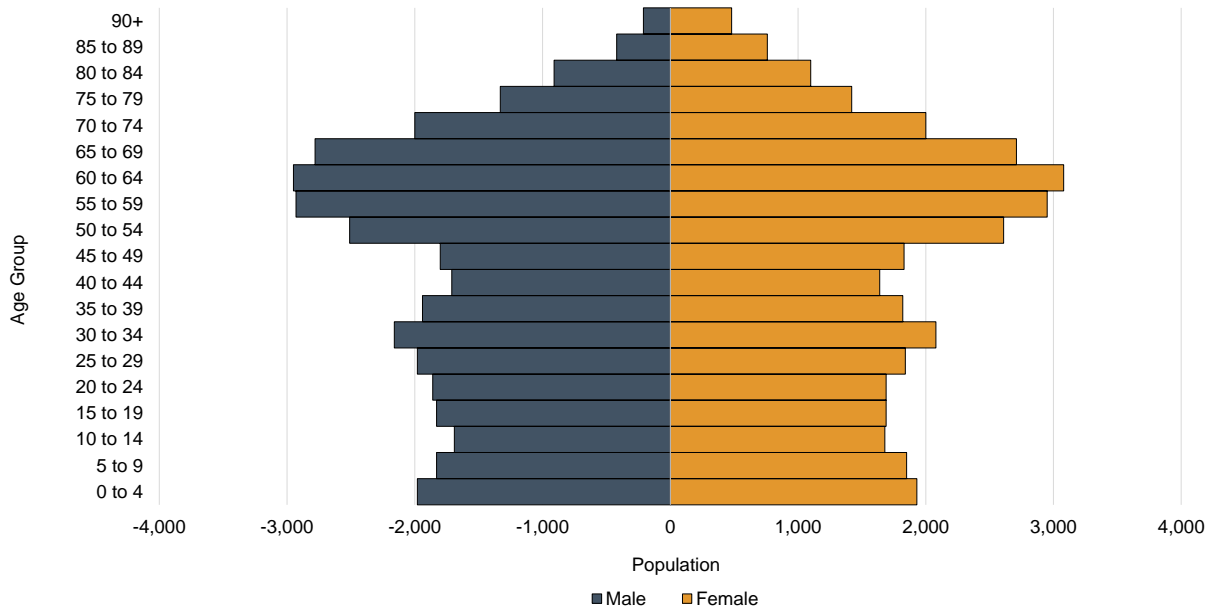
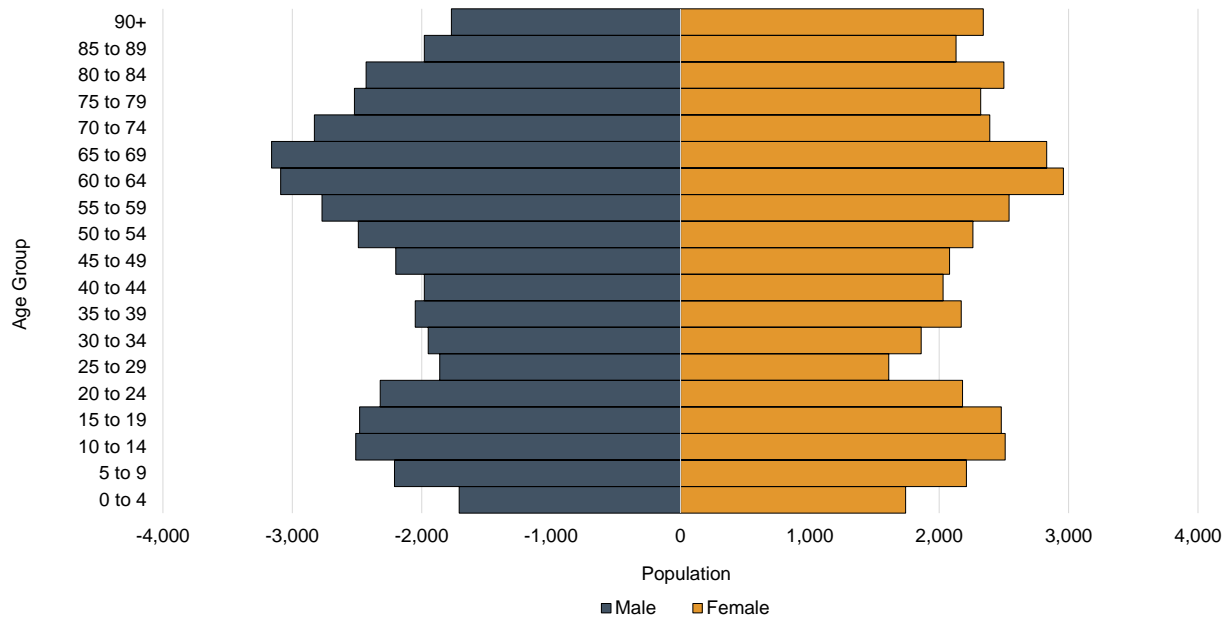


Figure 4-7  
Bruce County  
Population Age Structure, 2016



Source: Forecast by Watson & Associates Economists Ltd., 2019.

Figure 4-8  
Bruce County  
Population Age Structure, 2046

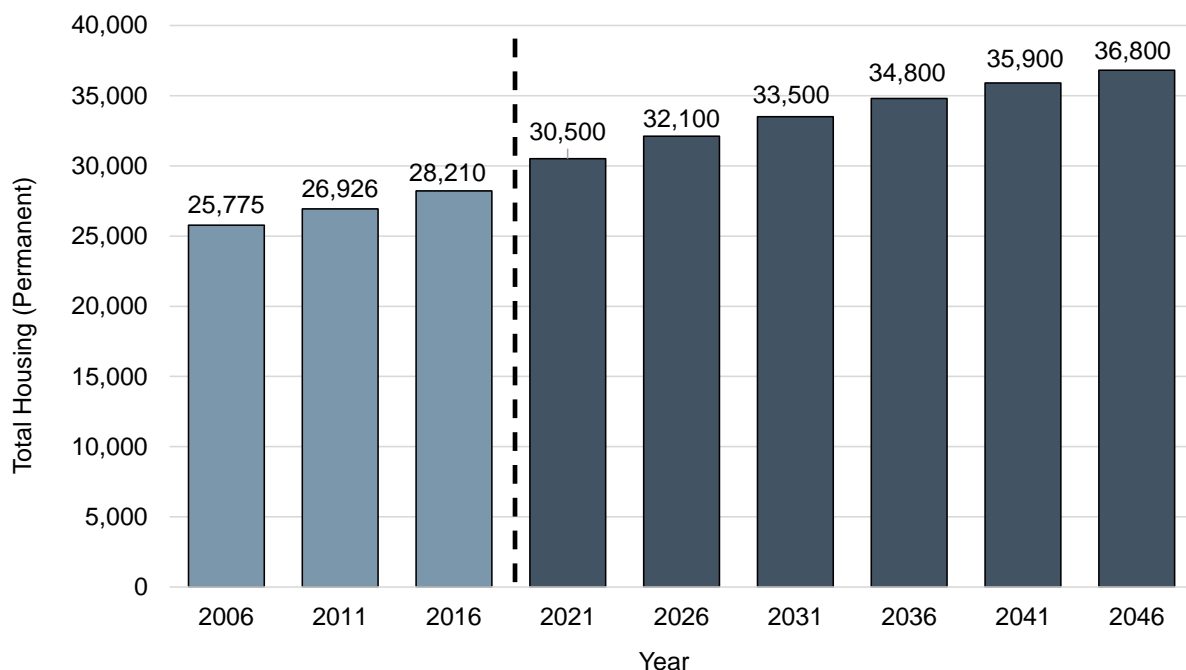


Source: Forecast by Watson & Associates Economists Ltd., 2019.

## 4.6 Bruce County Housing Forecast, 2016 to 2046

Figure 4-9 summarizes the Bruce County permanent household forecast from 2016 to 2046. Housing trends between 2001 and 2016 are also provided for historical context. By 2046 the County's permanent housing base is forecast to increase to 36,800 households from 28,210 in 2016. This represents an increase of approximately 8,600 households or an annual housing growth rate of 0.9% per year. Comparatively, this rate of forecast housing growth is slightly below the historical 15-year (2001 to 2016) annual average housing growth rate of 1%.<sup>24</sup>

Figure 4-9  
Bruce County  
Historical and Forecast Households, 2006 to 2046



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

Figure 4-10 summarizes historical and forecast housing growth for the County in five-year increments from 2001 to 2046. The following trends can be observed:

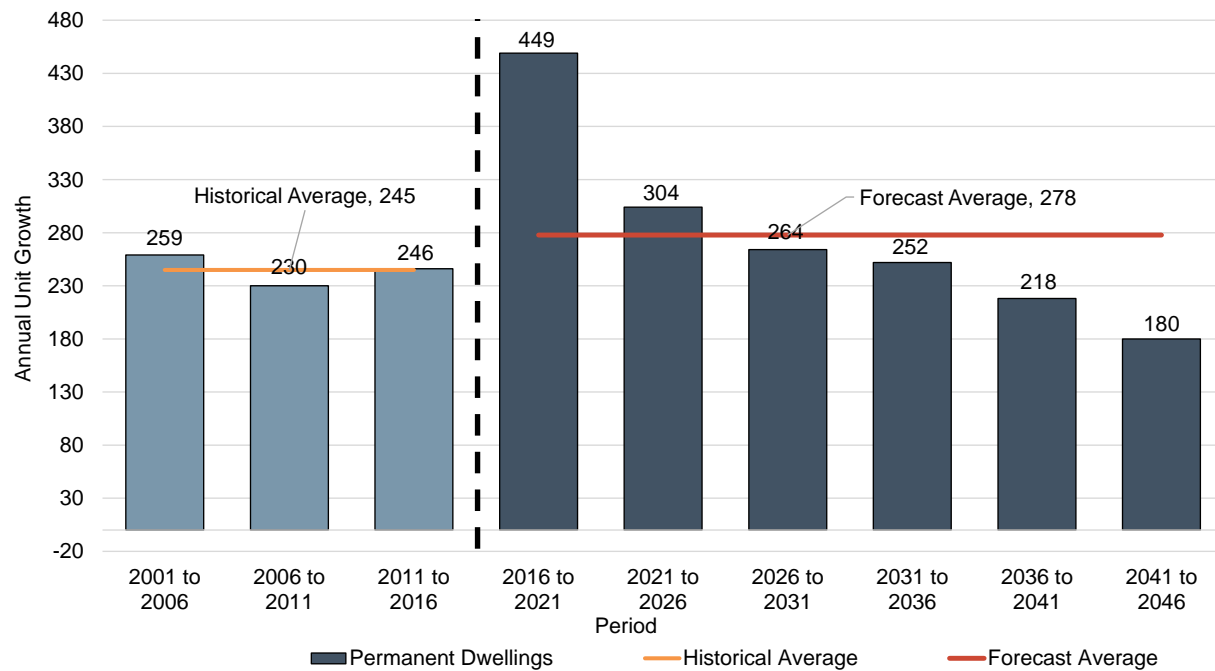
- From 2001 to 2016, historical housing development averaged 245 households annually;
- Based on a review of recent residential building permits issued for new dwellings between 2016 and 2020, projected annual housing development

<sup>24</sup> According to Statistics Canada Census data.

during the 2016 to 2021 projection period is anticipated to average significantly higher growth than historically observed over the past five years;

- Between 2016 and 2046, forecast housing development is expected to average 278 units annually; and
- Consistent with projected population trends over the longer term, the rate of future housing growth is expected to steadily slow over the forecast period.

Figure 4-10  
Bruce County  
Five-Year Incremental Housing Growth - Historical and Forecast, 2016 to 2046



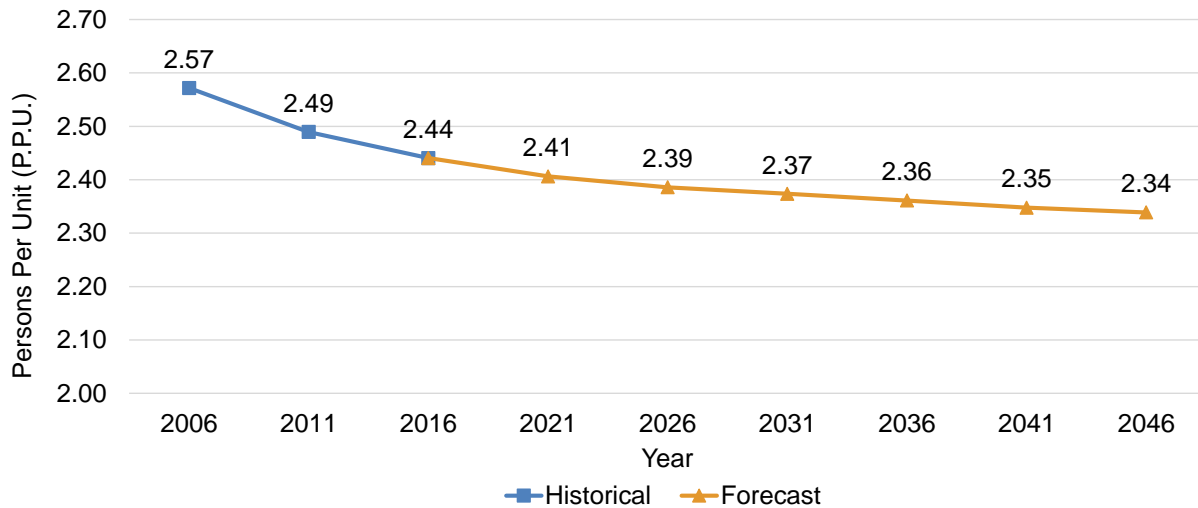
Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2020.

Figure 4-11 summarizes anticipated trends in long-term housing occupancy, or average persons per unit (PPU), for Bruce County from 2016 to 2046. Key observations include:

- Between 2006 and 2016, the average PPU for Bruce County declined from 2.57 to 2.44; and
- Over the forecast period, the average P.PU for Bruce County is anticipated to continue to gradually decline from 2.44 in 2016 to 2.34 in 2046, largely as a result of the aging of the County's population and a gradual shift towards medium- and high-density forms of housing.



Figure 4-11  
Bruce County  
Historical and Forecast Persons Per Unit, 2001 to 2046



Source: Statistics Canada Census and Demography Division, 2006 to 2016. Forecast (2021 to 2046) estimated by Watson & Associates Economists Ltd., 2020.  
Note: Figure includes net Census undercount estimated at 2.65%.

#### 4.6.1 Forecast Households by Dwelling Type, 2016 to 2046

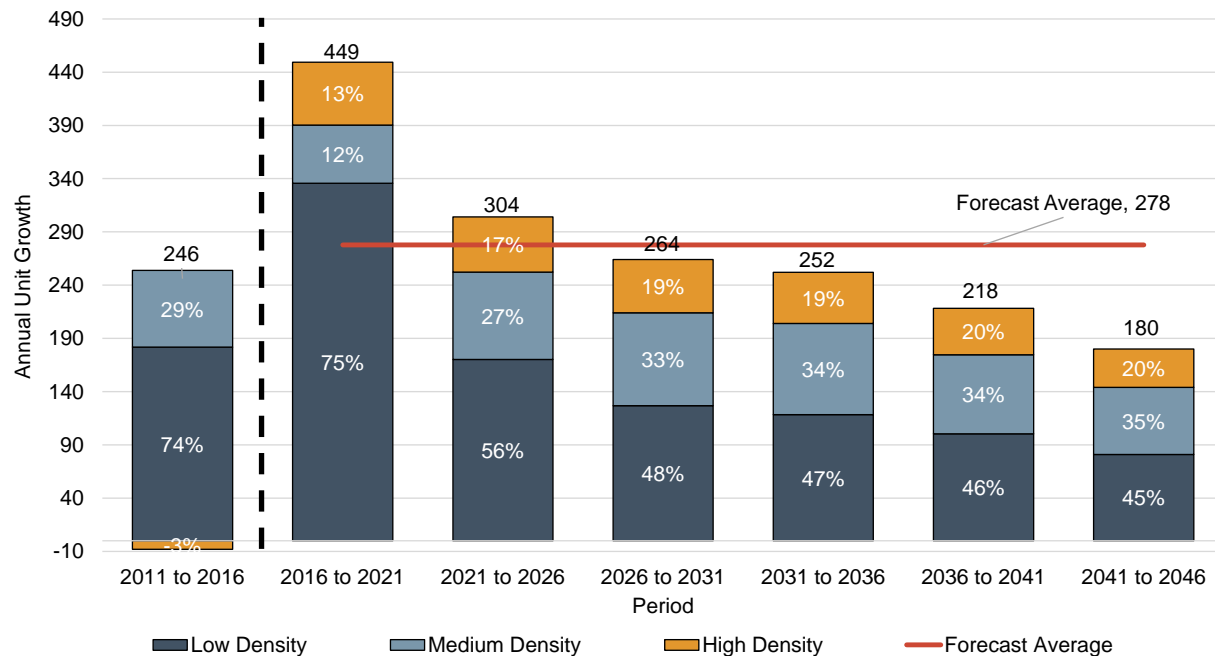
Figure 4-12 summarizes the Bruce County housing forecast by structure type (i.e. low-density, medium-density and high-density) over the 2016 to 2046 forecast period in five-year growth increments. Collective dwellings are incorporated into the overall Bruce County population and housing forecast but are not displayed in Figure 4-12.<sup>25</sup> Key observations include:

- New residential development within Bruce County is anticipated to gradually shift away from low-density housing forms, largely driven by demand for affordable housing options as well as increased demand for high-density housing associated with the 25-34 and 65+ population;
- This shift in the share of medium- and high-density housing forms is anticipated to be more pronounced in the County's Primary and Secondary settlement areas largely due to the greater number of opportunities, stronger market demand and available infrastructure to support residential intensification in these areas; and

<sup>25</sup> An additional component of the Census population is the non-household population. The household population relates to persons who are part of a household, whereas the non-household population relates to persons who are residents of collective dwellings. According to Statistics Canada, a collective dwelling refers to a dwelling of a commercial, institutional, or communal nature. Included in this type of dwelling are lodging or rooming houses, hotels, motels, tourist homes, nursing homes, hospitals, staff residences, communal quarters (military bases), work camps, jails, missions and group homes. Collective dwellings may be occupied by usual residents or solely by foreign and/or temporary residents. Population in collective dwellings is expected to increase over time largely as a result of the aging population.

- Over the 2016 to 2046 projection period, new housing is forecast to be comprised of 56% low-density (singles and semi-detached), 27% medium-density (townhouses) and 17% high-density (apartment) units.

Figure 4-12  
Bruce County  
Incremental Historical and Forecast Households by Structure Type (Permanent Households), 2011 to 2046



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

## 4.7 Seasonal Population and Housing Growth

According to MPAC data, seasonal housing represents a significant component of the County's total housing base, accounting for approximately 23% (8,290) of total dwelling units as of 2016. The County's proximity to the GGH continues to be a major driver of seasonal population growth.

Over the next 30 years, approximately 50 new seasonal housing units are forecast to be developed annually, totaling just over 1,560 new seasonal units across the County. Notwithstanding relatively strong demand for new seasonal housing construction over the next 30 years, Bruce County's seasonal housing and population base is anticipated to increase moderately due to the conversion of existing seasonal housing units to permanent dwellings. This trend in seasonal housing and population is consistent with recent trends experienced in Bruce County, as well as other municipalities in Ontario's "cottage country."

It is anticipated that the number of net conversions of seasonal units to permanent use will gradually slow down over the next decade. During the post-2031 period, the number of seasonal conversions is forecast to gradually decline as the aging of the population results in a growing number of housing conversions back to their former seasonal use.

Figure 4-13 and Figure 4-14 summarize the total housing forecast for Bruce County (permanent + seasonal) over the 2016 to 2046 forecast period. Annual housing growth has been compared against historical MPAC data. Key observations include:

#### Seasonal Population and Housing Growth

- On average, just under ten existing seasonal housing units are forecast to be converted to permanent housing units every year across the County between 2016 and 2046; and
- Over the 30-year forecast period, the seasonal housing base is forecast to increase from approximately 8,290 in 2016 to 9,850 in 2046.

#### Permanent + Seasonal Population and Housing Growth

- Permanent and seasonal housing growth for Bruce County is forecast to average approximately 340 units per year; and
- Demand for both permanent and seasonal housing is anticipated to be strongest during the 2016 to 2031 period, followed by a gradual reduction in demand during the post-2031 period.

**Figure 4-13**  
**Bruce County**  
**Permanent + Seasonal Growth Forecast, 2016 to 2046**

Year		Permanent Population (Including Census Undercount) <sup>1</sup>	Permanent and Seasonal Population (Including Census Undercount)	Housing Units								Permanent P.P.U. with Undercount	Permanent + Seasonal P.P.U. with Undercount
				Singles & Semi-Detached	Net Conversions (From Seasonal to Permanent)	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Other	Total Households	Seasonal Units	Total Households (Seasonal + Permanent)		
Historical	Mid-2006	66,290	66,290	22,280		830	2,310	360	25,780		34,830	2.57	
	Mid-2011	66,424	94,690	23,300		1,110	2,180	340	26,930	7,900	34,830	2.47	2.72
	Mid-2016	68,252	97,930	24,210		1,470	2,140	400	28,220	8,290	36,510	2.42	2.68
Forecast	Mid-2021	73,450	104,160	25,890	70	1,740	2,440	400	30,540	8,580	39,120	2.41	2.66
	Mid-2026	76,590	108,620	26,740	120	2,150	2,690	400	32,100	8,950	41,050	2.39	2.65
	Mid-2031	79,430	112,230	27,370	170	2,590	2,940	400	33,470	9,160	42,630	2.37	2.63
	Mid-2036	82,090	115,900	27,970	210	3,010	3,180	400	34,770	9,450	44,220	2.36	2.62
	Mid-2041	84,270	118,920	28,470	250	3,380	3,400	400	35,900	9,680	45,580	2.35	2.61
	Mid-2046	86,150	121,410	28,870	290	3,700	3,580	400	36,840	9,850	46,690	2.34	2.60
Incremental	Mid-2011 to Mid-2016	1,828	3,240	910	0	360	-40	60	1,290	390	1,680		
	Mid-2016 to Mid-2021	5,198	6,230	1,680	70	270	300	0	2,320	290	2,610		
	Mid-2016 to Mid-2026	8,338	10,690	2,530	120	680	550	0	3,880	660	4,540		
	Mid-2016 to Mid-2031	11,178	14,300	3,160	170	1,120	800	0	5,250	870	6,120		
	Mid-2016 to Mid-2036	13,838	17,970	3,760	210	1,540	1,040	0	6,550	1,160	7,710		
	Mid-2016 to Mid-2041	16,018	20,990	4,260	250	1,910	1,260	0	7,680	1,390	9,070		
	Mid-2016 to Mid-2046	17,898	23,480	4,660	290	2,230	1,440	0	8,620	1,560	10,180		

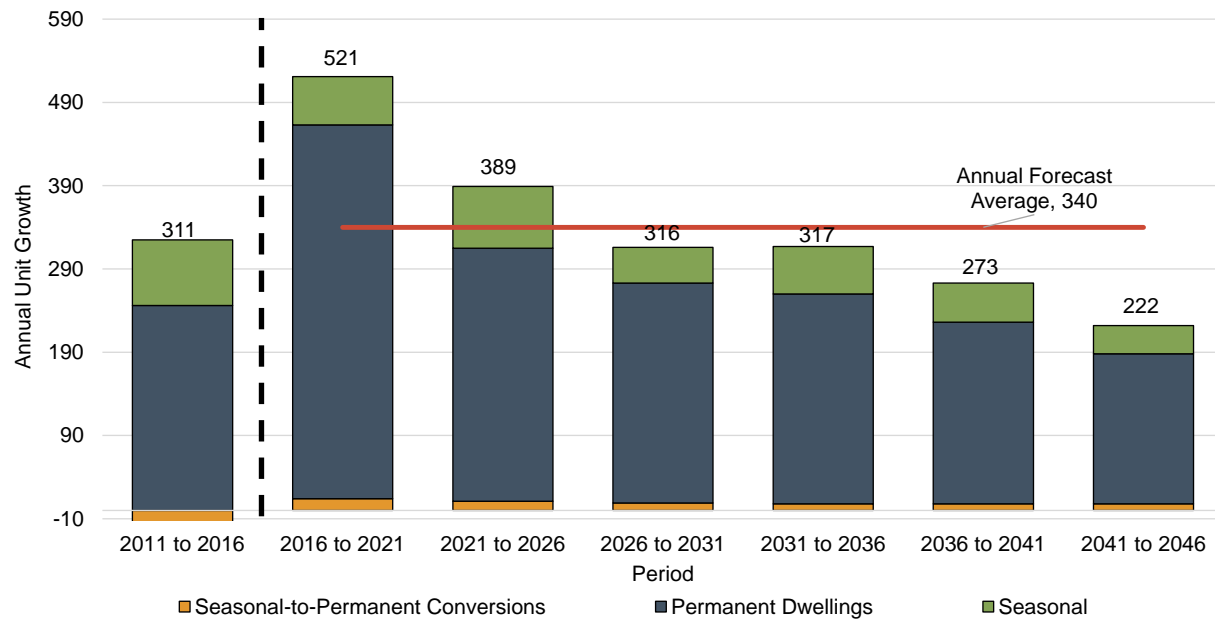
Source: Permanent data derived from Statistics Canada Census and seasonal data derived from MPAC. Forecast by Watson & Associates Economists Ltd., 2020.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure 4-14  
Bruce County  
Permanent + Seasonal Unit Forecast, 2016 to 2046



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

## 5 Allocation of Population, Housing and Employment Growth Forecasts by Local Municipality to the Year 2046

### 5.0 Growth Allocations by Local Municipality to the Year 2046

#### 5.0.1. Growth Forecast Approach and Key Assumptions

Figure 5-1 through Figure 5-5 summarize forecast population and housing allocations by local municipality within Bruce County. Additional details regarding the local municipal growth allocations by primary, secondary settlement area and remaining rural area are provided in Appendices B, C and D. The population and housing allocations by local municipality were developed based on a detailed review of the following local supply<sup>26</sup> and demand factors:

##### Local Supply Factors:

- Supply of potential future housing stock in the development approvals process by housing structure type and approval status;
- Local residential intensification opportunities and planning policy targets.
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process;
- High-level consideration with respect to municipal water and wastewater servicing capacity based on discussions with Bruce County staff; and
- Provincial policy direction regarding forecast residential growth by urban and rural area.

##### Demand Factors:

- Historical population, employment and housing trends based on 2001 to 2016 Statistics Canada (Census) data by urban community and remaining rural area;
- A review of recent residential and non-residential building permit activity by structure type by local municipality;
- Historical commuting trends and anticipated employment growth opportunities within the surrounding market area;
- A high-level review of local employment opportunities, including major business expansions/closures by major sector;

<sup>26</sup> Refer to Residential and Non-Residential Supply Analysis for Bruce County’s residential housing potential.

- Market demand for residential intensification by local municipality;
- The County's market appeal to young adults, families and empty nesters/seniors; and
- Demand for seasonal housing by local municipality.

While forecast population and employment growth rates vary significantly by geographic area, each of the local municipalities in Bruce County share a number of relatively common attributes with respect to long-term residential development and demographic trends.

- All local municipalities, including each Primary and Secondary Urban Community, are anticipated to experience housing growth over the long-term forecast period;
- While COVID-19 has been disruptive to the local economy, particularly in retail, accommodation and food and tourism-based sectors, it has been a key driver of higher housing development activity experienced across the County over the past year. As previously noted in Demographic, Economic and Socio-Economic Profile and Assessment of Long-Term Growth Drivers, higher levels of in-migration, largely from the GGH, were observed in Bruce County prior to the pandemic between 2015 and 2019, largely driven by eroding housing affordability within the larger urban centres of the GGH, combined with the gradual recovery of the Bruce County economy and that of the surrounding area;
- Looking forward over the near term (i.e. the next one to five years), housing demand across all the County's local municipalities is anticipated to remain strong relative to recent historical levels, fueled by historically low mortgage interest rates, continued outward growth pressure from the GGH and direct and indirect employment opportunities associated with the Bruce Power refurbishment;
- Over the longer term (i.e. five to 10+ years) the average rate of annual housing development is anticipated to gradually slow across all local municipalities, relative to recent residential development activity, driven by slower regional and provincial economic growth associated with an aging population and labour force. A gradual tightening in mortgage lending and rising household debt growth is also anticipated to contribute to this slower long-term growth trend;
- Future housing growth is anticipated to be dominated by low-density housing forms; however, increasing market opportunities will exist for medium-density and high-density housing as the local and provincial population base continues to age;
- Average housing occupancy levels are forecast to steadily decline from 2016 to 2046. This demographic trend is largely associated with the aging of the County's Baby Boom and Millennial populations;



- Forecast demographic trends across the County suggest that the percentage share of future housing will continue to shift towards Primary and Secondary Urban Communities as new families are attracted to the County in search of affordably priced, ground-oriented housing located within proximity to local urban amenities (i.e. schools, retail, personal service uses) and surrounding employment markets; and
- As previously discussed, housing demands from the 55-74 age group (empty nester/younger seniors) and the 75+ age group (older seniors) are also anticipated to drive the future need for urban housing across all local municipalities in Bruce County.

### 5.0.2 Summary of Long-Term Population, Household and Employment Growth Forecasts by Local Municipality

Figure 5-1 through Figure 5-5 summarize the County's long-term population, housing and employment forecast by local municipality over the 2016 to 2046 planning horizon. The following trends can be observed:

- The share of forecast population and housing growth across the County's local municipalities is anticipated to follow a similar trend relative to the 2001 to 2016 historical period;
- The Town of Saugeen Shores is expected to accommodate the largest share of housing growth over the 2016 to 2046 forecast period, with 41% of County-wide new housing development; and
- Forecast employment growth within the County is anticipated to be concentrated within the Municipality of Kincardine and the Town of Saugeen Shores.

**Figure 5-1**  
**Bruce County**  
**Population Forecast by Local Municipality, 2016 to 2046**

Total Population									
Timing	Municipality of Arran-Elderslie	Municipality of Brockton	Township of Huron-Kinloss	Town of Kincardine	Municipality of Northern Bruce Peninsula	Town of Saugeen Shores	Municipality of South Bruce	Town of South Bruce Peninsula	Bruce County
2001	6,832	10,032	6,465	11,456	3,738	11,829	6,298	8,403	<b>65,053</b>
2016	6,980	9,710	7,260	11,690	4,110	14,080	5,790	8,640	<b>68,260</b>
2021	7,200	10,000	8,000	12,300	4,600	16,400	6,000	9,000	<b>73,500</b>
2026	7,400	10,300	8,500	12,800	5,000	17,300	6,100	9,300	<b>76,700</b>
2031	7,500	10,600	8,800	13,100	5,100	18,600	6,300	9,500	<b>79,500</b>
2036	7,700	10,800	9,200	13,500	5,400	19,400	6,400	9,800	<b>82,200</b>
2041	7,800	11,000	9,500	13,800	5,600	20,100	6,600	10,000	<b>84,400</b>
2046	7,900	11,100	9,700	14,000	5,700	20,800	6,700	10,100	<b>86,000</b>
Incremental Growth									
2001-2016	148	(322)	795	234	372	2,251	(508)	237	<b>3,207</b>
2016-2021	220	290	740	610	490	2,320	210	360	<b>5,240</b>
2016-2026	420	590	1,240	1,110	890	3,220	310	660	<b>8,440</b>
2016-2031	520	890	1,540	1,410	990	4,520	510	860	<b>11,240</b>
2016-2036	720	1,090	1,940	1,810	1,290	5,320	610	1,160	<b>13,940</b>
2016-2041	820	1,290	2,240	2,110	1,490	6,020	810	1,360	<b>16,140</b>
2016-2046	920	1,390	2,440	2,310	1,590	6,720	910	1,460	<b>17,740</b>

Source: Historical data from Statistics Canada Census. Figure by Watson & Associates Economists Ltd., 2021.

Note: Numbers have been rounded and the population includes the net Census undercount of 2.65%.

**Figure 5-2**  
**Bruce County**  
**Permanent Housing Forecast by Local Municipality, 2016 to 2046**

Total Permanent Households									
Timing	Municipality of Arran-Elderslie	Municipality of Brockton	Township of Huron-Kinloss	Town of Kincardine	Municipality of Northern Bruce Peninsula	Town of Saugeen Shores	Municipality of South Bruce	Town of South Bruce Peninsula	Bruce County
2001	2,485	3,630	2,300	4,315	1,585	4,650	2,135	3,380	<b>24,480</b>
2016	2,760	3,940	2,780	4,850	1,930	6,020	2,210	3,740	<b>28,230</b>
2021	2,900	4,100	3,100	5,200	2,100	7,000	2,300	3,900	<b>30,600</b>
2026	2,900	4,200	3,300	5,400	2,300	7,600	2,400	4,100	<b>32,200</b>
2031	3,000	4,400	3,400	5,500	2,300	8,300	2,400	4,100	<b>33,400</b>
2036	3,100	4,500	3,600	5,700	2,400	8,800	2,500	4,300	<b>34,900</b>
2041	3,100	4,600	3,700	5,900	2,500	9,200	2,500	4,400	<b>35,900</b>
2046	3,200	4,700	3,800	6,000	2,600	9,600	2,600	4,400	<b>36,900</b>
Incremental Growth									
2001-2016	275	310	480	535	345	1,370	75	360	<b>3,750</b>
2016-2021	140	160	320	350	170	980	90	160	<b>2,370</b>
2016-2026	140	260	520	550	370	1,580	190	360	<b>3,970</b>
2016-2031	240	460	620	650	370	2,280	190	360	<b>5,170</b>
2016-2036	340	560	820	850	470	2,780	290	560	<b>6,670</b>
2016-2041	340	660	920	1,050	570	3,180	290	660	<b>7,670</b>
2016-2046	440	760	1,020	1,150	670	3,580	390	660	<b>8,670</b>

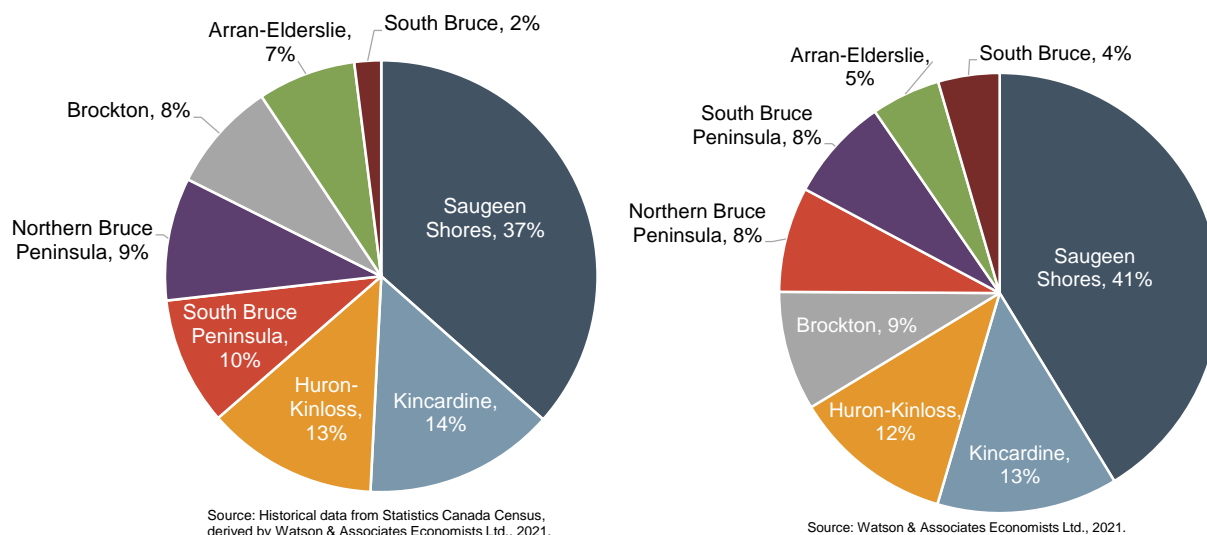
Source: Historical data from Statistics Canada Census. Figure by Watson & Associates Economists Ltd., 2021.

Note: Numbers have been rounded.

**Figure 5-3**  
**Bruce County**  
**Share of Permanent Housing Growth by Local Municipality, 2016 to 2046**

**2001 to 2016**

**2016 to 2046**



**Figure 5-4**  
Bruce County  
Employment Forecast by Local Municipality, 2016 to 2046

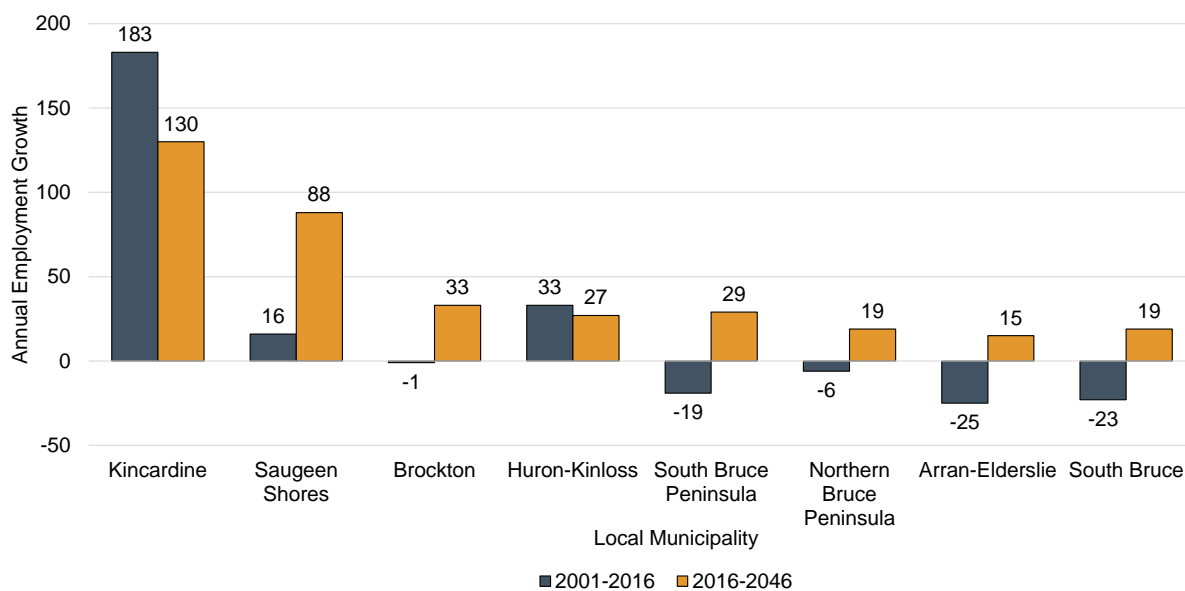
Total Employment									
Timing	Municipality of Arran-Elderslie	Municipality of Brockton	Township of Huron-Kinloss	Town of Kincardine	Municipality of Northern Bruce Peninsula	Town of Saugeen Shores	Municipality of South Bruce	Town of South Bruce Peninsula	Bruce County
2001	2,429	4,422	1,497	8,451	1,415	4,005	2,087	3,120	27,426
2016	2,060	4,400	1,990	11,190	1,320	4,250	1,740	2,840	29,790
2021	2,000	4,700	2,300	13,900	1,600	5,300	1,900	3,100	34,800
2026	2,300	4,900	2,400	14,800	1,700	5,600	2,000	3,300	37,000
2031	2,400	5,100	2,500	15,100	1,700	6,000	2,100	3,400	38,300
2036	2,400	5,200	2,600	15,100	1,800	6,300	2,200	3,500	39,100
2041	2,500	5,300	2,700	15,100	1,900	6,600	2,200	3,600	39,900
2046	2,500	5,400	2,800	15,100	1,900	6,900	2,300	3,700	40,600
Incremental Growth									
2001-2016	(369)	(22)	493	2,739	(95)	245	(347)	(280)	2,364
2016-2021	(60)	300	310	2,710	280	1,050	160	260	5,010
2016-2026	240	500	410	3,610	380	1,350	260	460	7,210
2016-2031	340	700	510	3,910	380	1,750	360	560	8,510
2016-2036	340	800	610	3,910	480	2,050	460	660	9,310
2016-2041	440	900	710	3,910	580	2,350	460	760	10,110
2016-2046	440	1,000	810	3,910	580	2,650	560	860	10,810

Source: Watson & Associates Economists Ltd., 2021.

Note: Numbers have been rounded. Total employment includes work at home and no fixed place of work.

**Figure 5-5**  
Bruce County

### Share of Employment Growth by Local Municipality, 2016 to 2046



Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

## 5.1 Seasonal Population and Housing Forecast, 2016 to 2046

Seasonal residents have the potential to further drive population and economic growth across Bruce County. Future development potential associated with the seasonal population is important to understand as these residents place demands on community services and municipal infrastructure across the County primarily during peak summer months. The distribution of forecast seasonal population and housing growth varies considerably by local municipality within Bruce County.

Figure 5-6 through Figure 5-8 summarize the allocation of seasonal population and housing growth for each of the County's local municipalities. The following trends can be observed:

- Existing seasonal population and housing is largely concentrated in the Municipality of Northern Bruce Peninsula and the Town of South Bruce Peninsula;
- Similar to existing conditions, the largest share of seasonal housing growth is anticipated in the Municipality of Northern Bruce Peninsula (approximately 65%) and the Town of South Bruce Peninsula (20%). Collectively, this represents close to half of all new housing activity for these municipalities over the next 25 years; and
- The urban and rural areas of Town of Saugeen Shores are anticipated to accommodate a modest share of County-wide seasonal housing growth between 2016 and 2046, at 9%.

Figure 5-6  
Bruce County  
Seasonal Population Growth by Local Municipality, 2016 to 2046

Seasonal Population									
Timing	Municipality of Arran-Elderslie	Municipality of Brockton	Township of Huron-Kinloss	Town of Kincardine	Municipality of Northern Bruce Peninsula	Town of Saugeen Shores	Municipality of South Bruce	Town of South Bruce Peninsula	Bruce County
2011	110	390	3,720	1,930	8,950	3,760	40	9,310	<b>28,210</b>
2016	110	390	3,790	1,930	10,020	3,940	40	9,670	<b>29,890</b>
2021	-	400	3,800	1,900	10,700	4,000	-	9,700	<b>30,500</b>
2026	100	400	3,900	2,000	11,500	4,100	-	10,000	<b>32,000</b>
2031	100	400	3,900	2,000	12,200	4,200	-	10,000	<b>32,800</b>
2036	100	400	4,000	2,000	12,900	4,300	-	10,400	<b>34,100</b>
2041	100	400	4,000	2,000	13,200	4,400	-	10,400	<b>34,500</b>
2046	100	400	4,000	2,000	13,600	4,400	-	10,700	<b>35,200</b>
Incremental Growth									
2011-2016	-	-	70	-	1,070	180	-	360	<b>1,680</b>
2016-2021	(110)	10	10	(30)	680	60	(40)	30	<b>610</b>
2016-2026	(10)	10	110	70	1,480	160	(40)	330	<b>2,110</b>
2016-2031	(10)	10	110	70	2,180	260	(40)	330	<b>2,910</b>
2016-2036	(10)	10	210	70	2,880	360	(40)	730	<b>4,210</b>
2016-2041	(10)	10	210	70	3,180	460	(40)	730	<b>4,610</b>
2016-2046	(10)	10	210	70	3,580	460	(40)	1,030	<b>5,310</b>

Source: Historical data derived from MPAC, by Watson & Associates Economists Ltd., 2021.

Note: Numbers have been rounded. Seasonal person per unit assumption of 3.58.

Figure 5-7  
Bruce County



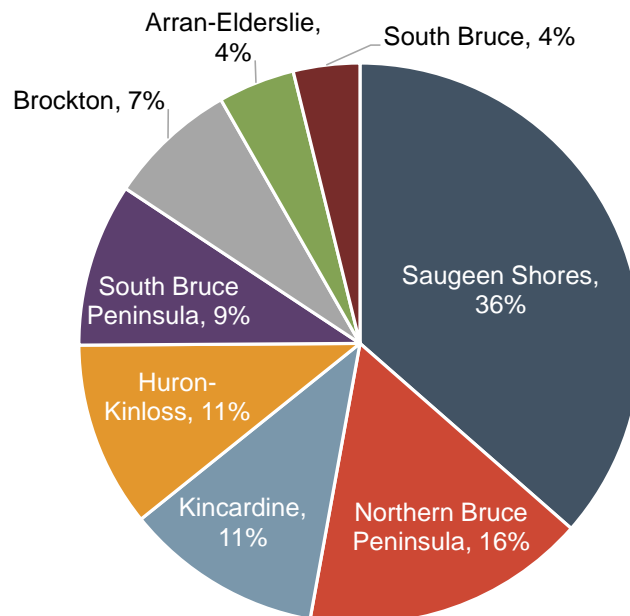
## Seasonal Household Growth by Local Municipality, 2016 to 2046

Total Seasonal Households									
Timing	Municipality of Arran-Elderslie	Municipality of Brockton	Township of Huron-Kinloss	Town of Kincardine	Municipality of Northern Bruce Peninsula	Town of Saugeen Shores	Municipality of South Bruce	Town of South Bruce Peninsula	Bruce County
2011	30	110	1,040	540	2,500	1,050	10	2,600	7,880
2016	30	110	1,060	540	2,800	1,100	10	2,700	8,350
2021	30	110	1,070	540	3,000	1,120	10	2,700	8,580
2026	30	110	1,090	550	3,200	1,150	10	2,800	8,940
2031	30	110	1,100	550	3,400	1,180	10	2,800	9,180
2036	40	110	1,110	550	3,600	1,200	10	2,900	9,520
2041	40	110	1,120	550	3,700	1,220	10	2,900	9,650
2046	40	110	1,130	550	3,800	1,240	10	3,000	9,880
Incremental Growth									
2011-2016	-	-	20	-	300	50	-	100	470
2016-2021	-	-	10	-	200	20	-	-	230
2016-2026	-	-	30	10	400	50	-	100	590
2016-2031	-	-	40	10	600	80	-	100	830
2016-2036	10	-	50	10	800	100	-	200	1,170
2016-2041	10	-	60	10	900	120	-	200	1,300
2016-2046	10	-	70	10	1,000	140	-	300	1,530

Source: Historical data derived from MPAC, by Watson & Associates Economists Ltd., 2021.

Note: Numbers have been rounded.

Figure 5-8  
Bruce County  
Permanent + Seasonal Housing Growth by Local Municipality, 2016 to 2046



Source: Watson & Associates Economists Ltd., 2021.

## 5.2 Housing Forecast by Primary and Secondary Urban Community

Building on the local municipal forecasts summarized in 37, population, housing and employment forecasts have also been allocated by Primary and Secondary Urban Community within Bruce County. According to Section 5.2 of the Bruce County OP, future growth within the County should be directed towards existing urbanized areas comprised of Primary and Secondary Urban Communities as well as hamlets. Section 5.2.1. of the OP further defines these areas:

**Primary Urban Communities** - Typically composed of towns, which function as regional service centres accommodating the largest concentration and widest range of residential, economic and social opportunities, services and facilities available in the County.

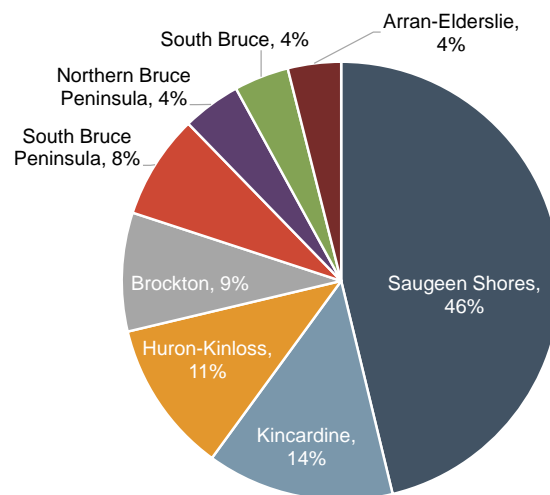
**Secondary Urban Communities** - Typically comprised of villages, functioning as local service centres accommodating a modest range of residential, economic and social opportunities, services and facilities available to the surrounding area.

Detail regarding the allocation of residential growth by each Primary and Secondary Urban Community is provided in Appendix C. For the purposes of this analysis, growth within Primary and Secondary Urban Communities by local municipality is summarized as “Urban”, while remaining areas are summarized as “Rural”. Figure 5-9 summarizes the share forecast housing growth between 2016 to 2046 within of Urban Communities.

Figure 5-10 provides a more detailed description of incremental Urban Community and Rural Area housing growth by local municipality by structure type. The following key observations are provided:

- Of the total 8,340 housing units forecast for Bruce County, 7,670 units (92%) are expected in the County's Urban Communities and 670 units (8%) in rural areas;
- The Town of Saugeen Shores Urban Community is anticipated to accommodate 46% of all new Urban housing development within the County; and
- Nearly all new medium- and high-density housing development is forecast to occur in Urban Communities.

Figure 5-9  
Bruce County  
Urban Community Household Forecast by Local Municipality, 2016 to 2046



Source: Watson & Associates Economists Ltd., 2021.

Figure 5-10  
Bruce County  
Total Household Forecast by Urban and Rural Area, 2016 to 2046

Local Municipality	Development Location	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units
Municipality of Arran-Elderslie	Urban	250	50	0	300
	Rural	80	0	0	80
	Total	330	50	0	380
Municipality of Brockton	Urban	320	180	180	680
	Rural	30	0	0	30
	Total	350	180	180	710
Township of Huron-Kinloss	Urban	790	40	30	860
	Rural	50	0	0	50
	Total	840	40	30	910
Town of Kincardine	Urban	510	250	300	1,060
	Rural	60	0	0	60
	Total	570	250	300	1,120
Municipality of Northern Bruce Peninsula	Urban	330	0	0	330
	Rural	290	0	0	290
	Total	620	0	0	620
Town of Saugeen Shores	Urban	1,110	1,500	930	3,540
	Rural	20	0	0	20
	Total	1,130	1,500	930	3,560
Municipality of South Bruce	Urban	290	20	0	310
	Rural	40	0	0	40
	Total	330	20	0	350
Town of South Bruce Peninsula	Urban	390	200	0	590
	Rural	100	0	0	100
	Total	490	200	0	690
Total Bruce County	Urban	3,990	2,240	1,440	7,670
	Rural	670	0	0	670
	Total	4,660	2,240	1,440	8,340

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

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Note: Permanent dwelling growth of new units, not inclusive of seasonal-to-permanent unit conversions. Numbers are rounded.

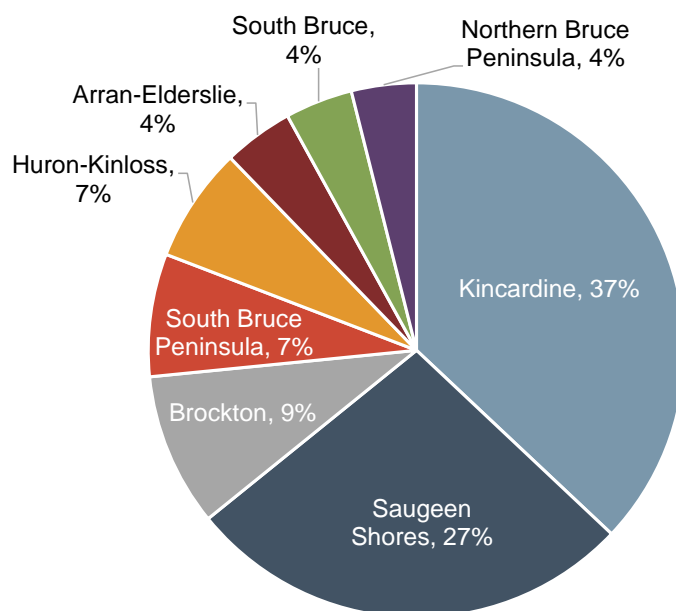
## 5.3 Bruce County Urban Employment Growth Allocations

Figure 5-11 through

Figure 5-12 summarize the County's long-term employment forecast by Urban and Rural Area between 2016 and 2046. Further details regarding the employment forecast by Primary and Secondary Urban Community are provided in Appendix D. The following trends can be observed:

- Of the total 11,000 jobs forecast for Bruce County, approximately 9,400 jobs (85%) are expected in the County's Urban Communities and approximately 1,600 jobs (15%) in rural areas; and
- The Municipality of Kincardine is forecast to accommodate over a third of the County's urban employment growth (37%), followed by the Town of Saugeen Shores with 27%.

Figure 5-11  
Bruce County  
Urban Employment Growth Allocation, 2016 to 2046



Source: Watson & Associates Economists Ltd., 2021.

Figure 5-12  
Bruce County  
Total Employment Growth by Urban Communities and Remaining Rural Area, 2016 to  
2046



Local Municipality	Development Location	Total Employment
Municipality of Arran-Elderslie	Urban	396
	Rural	46
	Total	442
Municipality of Brockton	Urban	869
	Rural	107
	Total	976
Township of Huron-Kinloss	Urban	653
	Rural	131
	Total	784
Town of Kincardine	Urban	3,477
	Rural <sup>1</sup>	727
	Total	4,205
Municipality of Northern Bruce Peninsula	Urban	367
	Rural	253
	Total	620
Town of Saugeen Shores	Urban	2,545
	Rural	78
	Total	2,623
Municipality of South Bruce	Urban	383
	Rural	131
	Total	514
Town of South Bruce Peninsula	Urban	697
	Rural	185
	Total	882
Total Bruce County	Urban	9,387
	Rural	1,658
	Total	11,046

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

Note: Total employment includes work at home and no fixed place of work.

<sup>1</sup> Kincardine rural includes on-site Bruce Power employment.

## 6 Residential and Non-Residential Land Needs, 2021 to 2046

### 6.0 Introduction

This chapter examines the County's long-term residential and non-residential land needs by Primary and Secondary Urban Community over a three-year, 15-year and 25-year planning horizon in accordance with subsection 1.1.2 and 1.4 of the PPS, 2020. This needs assessment is based on a detailed review of forecast demand and available vacant land supply by Primary and Secondary Urban Community.

Figure 6-2 provides a summary of forecast housing growth by Urban Communities and remaining rural/hamlets areas over the 2021 to 2046 planning horizon in accordance with the 30-year forecast provided in 31.<sup>27</sup> As previously identified in 31, approximately 92% of forecast housing growth across Bruce County over the next 25 years is anticipated to be accommodated within the County's Primary and Secondary Urban Communities. This represents a total of approximately 5,600 new households over the 2021 to 2046 forecast period, or approximately 225 new households annually in the County's Urban Communities. The remaining 8% of forecast housing growth is anticipated to be accommodated within the County's hamlets and remaining rural areas.

Figure 6-1  
Bruce County  
Forecast Housing Demand, Urban and Rural Area, 2016 to 2046

<sup>27</sup> In determining long-term urban land needs, a 25-year planning horizon has been applied in accordance with the PPS., 2020. Refer to Section 6.3.

Development Location	Timing	Singles & Semi-Detached	Multiples <sup>1</sup>	Apartments <sup>2</sup>	Total Residential Units	Proportionate Share of Total
Urban Areas <sup>3</sup>	2016 to 2046	3,990	2,240	1,440	7,670	92%
Remaining Rural Areas <sup>4</sup>		670	-	-	670	8%
Bruce County		4,660	2,240	1,440	8,340	100%

Source: Watson & Associates Economists Ltd., 2021.

1 Includes townhouses and apartments in duplexes.

2 Includes accessory apartments, bachelor, 1-bedroom and 2-bedroom + apartments.

3 Includes Primary and Secondary Urban Communities.

4 Includes rural hamlets.

**Figure 6-2**  
**Bruce County**  
**Forecast Housing Demand, Urban and Rural Area, 2021 to 2046**

Development Location	Timing	Singles & Semi-Detached	Multiples <sup>1</sup>	Apartments <sup>2</sup>	Total Residential Units	Proportionate Share of Total
Urban Areas <sup>3</sup>	2021 to 2046	2,519	1,960	1,147	5,626	92%
Remaining Rural Areas <sup>4</sup>		465	-	-	465	8%
Bruce County		2,984	1,960	1,147	6,091	100%

Source: Watson & Associates Economists Ltd., 2021.

1 Includes townhouses and apartments in duplexes.

2 Includes accessory apartments, bachelor, 1-bedroom and 2-bedroom + apartments.

3 Includes Primary and Secondary Urban Communities.

4 Includes rural hamlets.

## 6.1 Urban Residential Land Needs, 2021 to 2046

As previously identified, requirements for long-term residential land needs in Ontario municipalities are set out in the PPS, 2020. As such, Bruce County must plan for its long-term land needs in accordance with the guidelines established in the PPS, 2020. Section 1.1.2 of the PPS states that:

“Sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 25 years. However, where an alternate time period has been established for specific areas of the Province as a result of a provincial planning exercise or a *provincial plan*, that time frame may be used for municipalities within the area.

Within *settlement areas*, sufficient land shall be made available through *intensification* and *redevelopment* and, if necessary, *designated growth areas*.”

Section 1.4.1 of the PPS, 2020 further states:

“To provide for an appropriate range and mix of housing types and densities required to meet projected requirements of current and future residents of the *regional market area*<sup>28</sup>, planning authorities shall:

- a. maintain at all times the ability to accommodate residential growth for a minimum of 15 years through *residential intensification* and *redevelopment* and, if necessary, lands which are *designated and available* for residential development; and
- b. maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate *residential intensification* and *redevelopment* and land in draft approved and registered plans.”

If the requirements of subsection 1.4.1 of the PPS, 2020 are not satisfied, subsection 1.1.3.8 of the PPS states that:

“A planning authority may identify a *settlement area* or allow the expansion of a *settlement area* boundary only at the time of a *comprehensive review* and only where it has been demonstrated that:

- a. sufficient opportunities to accommodate growth and to satisfy market demand are not available through *intensification, redevelopment* and *designated growth areas* to accommodate the projected needs over the identified planning horizon;
- b. the *infrastructure* and *public service facilities* which are planned or available are suitable for the development over the long term, are financially viable over their life cycle and protect public health and safety and the natural environment;
- c. in *prime agricultural areas*:
  1. the lands do not comprise *specialty crop areas*;
  2. alternative locations have been evaluated and
    - i. there are no reasonable alternatives which avoid *prime agricultural areas*; and

<sup>28</sup> In accordance with the PPS., 2020, the *regional market area* refers to an area that has a high degree of social and economic interaction. The upper- or single-tier municipality, or planning area, will normally serve as the *regional market area*. However, where a regional market area extends significantly beyond these boundaries, then the *regional market area* may be based on the larger market area. Where regional market areas are very large and sparsely populated, a smaller area, if defined in an OP, may be utilized.

- ii. there are no reasonable alternatives on lower priority agricultural lands in *prime agricultural areas*;
- d. the new or expanding *settlement area* is in compliance with the *minimum distance separation formulae*; and
- e. impacts from new or expanding *settlement areas* on agricultural operations which are adjacent or close to the *settlement area* are mitigated to the extent feasible.”

A key objective of this study is to address subsection 1.4.1 of the PPS, 2020 as it specifically relates to item (a) of subsection 1.1.3.8.

Figure 6-3 summarizes the County’s ability to accommodate short-term housing demand<sup>29</sup> based on potential housing supply identified within draft approved and registered plans, including identified housing intensification opportunities by Primary and Secondary Urban Community. This analysis indicates that Bruce County has an adequate supply of potential housing units in registered and draft-approved plans, as well as intensification to accommodate housing demand over a three-year period, in accordance with section 1.4.1 (b) of the PPS, 2020. More specifically, it is anticipated that the County’s potential housing supply in active development applications plus identified residential intensification<sup>30</sup>, can accommodate forecast housing demand for up to 14 years, which satisfies section 1.4.1 (b) of the PPS, 2020.

Figure 6-3  
Bruce County  
Three-Year Urban Housing Supply

Primary and Secondary Urban Communities	Total Supply of Draft Approved and Registered Housing Units	Intensification Potential Supply (10%)	Total Three-Year Housing Supply	Short-Term Housing Average Annual Demand <sup>1</sup>	Years of Supply
Bruce County	3,494	349	3,843	275	14

Source: Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Based on 2021 to 2024 housing forecast.

<sup>29</sup> Short-term housing demand has been derived from the 2021 to 2024 housing forecast within the County’s Urban Communities.

<sup>30</sup> Potential intensification supply is calculated as 10% of the respective total housing supply in Figure 6-3 and Figure 6-4. This residential intensification target was based on a review of historical housing trends, discussions with local municipal staff, a review of active residential development applications and a review of housing intensification targets in comparable municipalities within the southern Ontario.

Figure 6-4 summarizes the potential supply of future housing units in draft-approved, registered plans, including identified intensification potential, plus vacant designated residential areas within Bruce County by Primary and Secondary Urban Community, as summarized in County-Wide Population, Housing and Employment Growth Forecasts, 2016 to 2046. In accordance with forecast housing growth over the next 15 years, Bruce County can accommodate up to 73 years of anticipated housing demand within its Primary and Secondary Urban Communities.

Figure 6-4  
Bruce County  
15-Year Urban Housing Supply

Primary and Secondary Urban Communities	Total Supply of Draft Approved and Registered Housing Units and Vacant Designated Land	Intensification Potential Supply (10%)	Total 15-Year Housing Supply	Short-Term Housing Average Annual Demand <sup>1</sup>	Years of Supply
Bruce County	16,709	1,671	18,380	252	73

Source: Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Based on 2021 to 2036 housing forecast.

Figure 6-5 summarizes the County's long-term urban housing needs over the 2021 to 2046 planning horizon, based on forecast long-term demand and total available housing supply within the County's Primary and Secondary Urban Communities. Comparing the anticipated housing development yield of the County's designated vacant urban residential lands (16,400 housing units), against forecast urban housing demand over the next 25 years (5,600 units), generates a potential surplus of approximately 10,700 housing units by 2046. As summarized, the County's aggregate supply of designated land within its Urban Communities is sufficient to accommodate urban housing demand over the 25-year planning horizons at a County-wide level. A surplus of designated urban lands is forecast across all of the County's Primary and Secondary Urban Communities. Additional details regarding residential land needs at the Primary and Secondary Urban Community level can be found in Appendix E.

Figure 6-5  
Bruce County (Primary and Secondary Urban Community)  
Long-Term Urban Housing Needs, 2021 to 2046

Bruce County		Singles & Semi-Detached	Multiples <sup>1</sup>	Apartments <sup>2</sup>	Total Residential Units
Primary and Secondary Urban Communities	Supply <sup>3</sup>	9,564	3,756	3,048	16,368
	Demand (2021 to 2046)	2,519	1,960	1,147	5,626
	Surplus	7,045	1,796	1,901	10,742

Source: Watson & Associates Economists Ltd., 2021.

1 Includes townhouses and apartments in duplexes.

2 Includes accessory apartments, bachelor, 1-bedroom and 2-bedroom + apartments.

3 Supply adjusted from 2020 to 2021, based on short-term demand forecast.

## 6.2 Employment Area Land Demand, 2021 to 2046

### 6.2.1. Introduction

Employment Areas typically include a broad range of designated lands, including light, medium and heavy industrial lands, business parks and rural industrial lands. Employment Areas accommodate primarily export-based employment, including a wide range of industrial uses (e.g. manufacturing, distribution/logistics, transportation services), as well as specific commercial and institutional uses (e.g. office, services, ancillary/accessory retail).

Employment Areas form a vital component of urban land-use structure and are an integral part of the local economic development potential of the economic region. Through development of its industrial land base, the County is better positioned to build more balanced, complete and competitive communities. Development typically accommodated on Employment Areas generates relatively strong economic multipliers (i.e. spin-off effects) that benefit Bruce County directly and indirectly. In addition, Employment Areas development typically generates high-quality employment opportunities which can improve local socio-economic conditions (i.e. live/work opportunities). Furthermore, achieving non-residential growth adds to the County's assessment base, which can help support competitive property taxes and stronger municipal service levels. Employment Area development also tends to produce more positive net fiscal benefits for the community than other types of development (e.g. residential and retail). Thus, a healthy balance between residential and non-residential development is considered an important policy objective for Bruce County.

In contrast to other urban land uses (e.g. commercial and mixed-use areas), Employment Areas provide an opportunity to accommodate export-based employment



sectors that cannot be easily accommodated in other areas of the County. In order for Bruce County to continue to be competitive and attractive to a broad range of industrial and commercial sectors, the County needs to ensure that it has a sufficient supply and market choice of serviced Employment Areas. Most notably, this should include medium to larger sites with good transportation access as well as other local/regional transportation infrastructure.

### 6.2.2. Forecast Employment Area Land Needs, 2021 to 2046

In assessing the County's long-term Employment Area land needs consideration has been given to the following:

- Long-term employment growth potential by major sector (refer to County-Wide Population, Housing and Employment Growth Forecasts, 2016 to 2046);
- The share of employment growth on Employment Areas by major sector (industrial, commercial, institutional);
- Forecast employment density assumptions (i.e. employees/net hectare or acre) regarding existing and new businesses on Employment Areas;
- Forecast Employment Area absorption trends; and
- The amount of long-term net Employment Areas currently designated for employment uses but currently not developed (vacant) within Bruce County (Chapter 3).

Figure 6-6 summarizes the County's employment forecast in Employment Areas over the next 25 years. For detailed information about each area municipality in Bruce County, please refer to Appendix F. Over the 25-year planning horizon, the County's Employment Areas are anticipated to accommodate approximately 35% of the County's total urban employment growth, totaling 2,060 employees between 2021 and 2046.

Figure 6-6  
Bruce County  
Employment Growth in Primary and Secondary Urban Communities, 2021 to 2046

Employment Type	Bruce County Urban Employment Growth by Sector	Bruce County Employment Growth on Urban Employment Areas	% on Employment Lands
	2021 to 2046	2021 to 2046	
Primary	-	-	0%
Work at Home	850	-	0%
Industrial	1,650	1,650	100%
Commercial/Population-Related	1,470	360	24%
Institutional	1,010	50	5%
N.F.P.O.W.	920	-	0%
<b>Total Employment</b>	<b>5,900</b>	<b>2,060</b>	<b>35%</b>

Source: Watson & Associates Economists Ltd., 2021.

In accordance with the County's long-term employment forecast, Figure 6-7 summarizes forecast Employment Area demand from 2021 to 2046 by local municipality. Assuming an average target density on Employment Areas of 13 jobs per net ha (32 jobs per net acre), Bruce County is forecast to absorb an average of 6 net ha (15 net acres) of Employment Area land per year over the next 25 years, which totals 158 net ha (390 net acres).

Figure 6-7  
Bruce County  
Forecast Employment Area Land Demand, 2021 to 2046

Growth Period	Total Employment in Employment Areas	Employment Density (Jobs per net ha)	Total Employment Area Demand (Net ha)	Average Annual Employment Area Demand (Net ha)
2020 to 2025	710	13	55	11
2020 to 2030	970	13	75	7
2020 to 2035	1,420	13	109	7
2020 to 2040	1,740	13	134	7
<b>2020 to 2045</b>	<b>2,060</b>	<b>13</b>	<b>158</b>	<b>6</b>

Source: Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Total Employment in Employment Areas calculation assumes 0% intensification.

Figure 6-8 summarizes the supply of net developable vacant lands in Employment Area as of 2021.<sup>31</sup> It is noted that some of the County's vacant lands within Employment Areas will likely not develop over the planning horizon. This includes sites in which development may be physically constrained for the following reasons:

- Lots are small in size, fragmented, have odd configuration;
- Potential access issues and servicing issues which may impact development feasibility; and
- Inactivity/land banking, etc., which may tie up potentially vacant and developable lands.

Long-term land vacancy is a common characteristic that is broadly experienced in Employment Area in Ontario and beyond. For the purpose of this analysis, a 15% long-term land vacancy has been applied to the net developable vacant employment land inventory. Adjusted for land vacancy, the County's net developable vacant industrial land supply is 259 net hectares (640 net acres). Of this vacant net developable land identified, 76% of this supply is located in the Municipality of Kincardine.

Figure 6-8  
Bruce County  
Forecast Employment Area Supply (Ha), 2020

<sup>31</sup> Vacant land supply in 2021 is an estimate using the 2020 vacant land supply established in Residential and Non-Residential Supply Analysis and applying the short-term employment demand forecast.

Municipality	Vacant Designated Employment Land Supply (Hectares)						
	Total Gross Land Area <sup>1</sup> (A)	Environmental Constraints Adjustment <sup>1</sup> (B)	Area Adjusted for Environmental Constraints	Adjustment for roads and other internal infrastructure <sup>2</sup> (C)	Net Developable Employment Land Supply (D = A-B-C)	Adjusted Net Developable Employment Land Supply, 2021 <sup>3</sup>	Percentage of Adjusted Vacant Employment Land Supply
Municipality of Arran-Elderslie	14	1	13	1	12	10	4%
Municipality of Brockton	32	3	29	4	26	21	8%
Township of Huron-Kinloss	6	0	6	1	5	4	2%
Town of Kincardine	329	40	289	43	246	197	76%
Municipality of Northern Bruce Peninsula	12	0	12	2	10	8	3%
Town of Saugeen Shores	14	0	14	2	12	7	3%
Municipality of South Bruce	13	5	8	0	8	6	2%
Town of South Bruce Peninsula	9	0	9	2	7	7	3%
<b>Bruce County Total</b>	<b>429</b>	<b>48</b>	<b>381</b>	<b>56</b>	<b>325</b>	<b>259</b>	<b>100%</b>

Source - Derived from Bruce County GIS Data by Watson & Associates Economists Ltd. 2020

Note - Based on gross land area with takeouts in accordance with the Growth Plan, 2020

<sup>1</sup>Reflects environmental take-out of vacant employment lands encroached by environmentally sensitive lands identified as Natural Resources/Environment in the Official Plan Layers provided by the County

<sup>2</sup>Downward adjustment of 15% of the gross area (after environmental takeouts) has been applied to account for internal infrastructure on parcels greater than 1 ha in size

<sup>3</sup>Net developable employment land supply adjusted from 2020 to 2021, based on short-term employment demand forecast. 15% land vacancy adjustment also applied.

Figure 6-9 summarizes forecast Employment Area land needs for Bruce County over the 25-year planning horizon. In accordance with the County's supply of designated, developable vacant Employment Areas located in Urban Communities and forecast demand for these lands, a County-wide surplus of 101 net ha (250 net acres) has been identified by 2046. It is noted that the identified Employment Area land needs are not uniform across the County. All Primary and Secondary Urban Communities are forecast to experience an Employment Area land surplus by 2046, with the exception of the Saugeen Shores Urban Community.

As displayed in Figure 6-10, the Saugeen Shores Urban Community is expected to experience a shortfall of designated Employment Area lands land between 2026 and 2031. By 2046, a total Employment Area deficit of 16 net ha (40 net acres) has been identified for the Saugeen Shores Urban Community. It is noted that this identified net Employment Area land need does not reflect land requirements associated with local infrastructure and (e.g. local roads, stormwater ponds, utility easements, etc.) Adjusted for local infrastructure (approximately 25% of gross development lands area), the Employment Area land need for Saugeen Shores is 20 gross ha (49 gross acres over the 25-year forecast period. It is further noted that the location options for Employment Area expansion within Saugeen Shores may also need to consider additional land need adjustments associated with non-developable environmental areas/natural features and/or hazard areas.

Figure 6-9  
Bruce County

## Forecast Employment Area Land Needs (Demand vs. Supply), 2021 to 2046

2021 to 2046	Urban Employment Areas by Local Municipality		
	Net Employment Area Demand (Net ha)	Net Employment Area Supply <sup>1</sup> (Net ha)	Employment Area Surplus/Deficit (Net ha)
Municipality of Arran-Elderslie	6	10	3
Municipality of Brockton	14	21	7
Township of Huron-Kinloss	4	4	0
Town of Kincardine	103	197	94
Municipality of Northern Bruce Peninsula	2	8	7
Town of Saugeen Shores	23	7	-16
Municipality of South Bruce	3	6	3
Town of South Bruce Peninsula	3	7	3
<b>Bruce County</b>	<b>158</b>	<b>259</b>	<b>101</b>

Source: Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Based on the adjusted net developable employment supply identified in Figure 6-8.

## Figure 6-10 Saugeen Shores Urban Community Forecast Employment Area Land Needs (Demand vs. Supply), 2021 to 2046

Development Location	Net Employment Land Supply (ha)			Timing	Employment on Employment Lands	Jobs per net ha	Land Demand (net ha)	Net Deficit <sup>1</sup>
	Vacant	Occupied	Total					
Saugeen Shores Urban Area	7	83	90	2021 to 2026	70	13	5	2
				2021 to 2031	147	13	11	-4
				2021 to 2036	199	13	15	-8
				2021 to 2041	250	13	19	-12
				2021 to 2046	297	13	23	-16

Source: Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Reflective of a net land demand and does not include the additional lands associated with non-developable features.

## 7 Recommended Directions

### 7.0 Public Engagement

Public engagement and consultation are a core component of the GMS exercise. Council, local municipalities, key stakeholders and County residents share an important opportunity to guide how growth and change within the County will be managed over the long-term planning horizon. Managing this change will principally occur through the policies of the Bruce County OP and the GMS is a key input to developing a policy framework that directs how and where the County will grow and ensuring that matters of provincial interest are protected, including sustainable infrastructure and the wise management of land and resources. Responsibly managing this growth and change is a core function of land use planning and one that benefits from the broad input and perspectives of a community.

It is the intent of the engagement program for the GMS to collaborate with County Council, local municipalities, key stakeholders and residents to explore and evaluate a range of growth management perspectives. Following presentation of the Draft GMS to the County's Planning and Development Committee, stakeholder workshops are planned with local municipalities and key stakeholders. These engagement opportunities are further augmented by opportunities for the public to participate through the Plan the Bruce online portal and direct communication with County staff. Now that the Draft GMS is prepared, the County will facilitate consultation regarding the findings of the GMS, including the Recommended Recommendations, prior to finalizing.

### 7.1 Residential Planning Policy Matters

A fundamental objective of the GMS is to understand how and where residential growth within the County and local municipalities will occur over the long-term planning horizon. Residential growth policies of the Bruce County OP will need to be consistent with the PPS, 2020 while being considerate of the specific County and local municipal contexts. It is also required that the County plan for residential growth in a coordinated, sustainable and resilient manner that makes efficient use of land, resources and infrastructure, while protecting public health and safety.

On this basis, the following residential planning policy matters build on the findings of the Bruce County GMS, while recognizing the provincial, County and area municipal planning policy framework. Each policy recommendation establishes current issues and opportunities, which are then contemplated by a range of policy directions to be considered through the upcoming review of the Bruce County OP. Overall, the residential planning policy matters intend to establish a framework for managing residential growth through responsible land use planning processes and activities.

Recommendation 1: Maintain a Distinct Settlement Area Structure	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Defining a distinct settlement area structure within the County contributes to the responsible, coordinated and efficient management of land and resources over the long-term planning horizon. Settlement areas are generally defined as lands within a municipality that are planned to accommodate most of the forecasted growth and have sufficient municipal servicing and infrastructure capacity to do so. The County's new OP represents an important opportunity to advance a distinct settlement area structure for the purpose of responsible growth management while being consistent with Provincial policy direction.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>To make efficient use of land, resources, infrastructure and public services, the County should maintain a distinct settlement area structure. It is therefore recommended that growth continue to be largely managed by directing future development to the Primary and Secondary Urban Communities, thereby optimizing existing infrastructure, creating compact, complete and resilient communities and protecting natural heritage resources and agricultural land. Modest growth may be contemplated in the Hamlet communities, provided the OP policy framework is consistent with the PPS, 2020 in this regard.</li> <li>The County's OP should contemplate policy direction to local municipal OPs that encourages land use structures that similarly optimize existing infrastructure, creating compact, complete and resilient communities, provide a range of housing options, and protect natural heritage resources and agricultural land.</li> </ul>
Recommendation 2: Plan for Permanent Population Growth Within the County	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Permanent population growth contributes the overall well-being of a community and is an important indicator of vitality. Identifying permanent population growth projections enables elected representatives, municipal staff and members of the community to understand where and how growth will occur. It also enables municipalities to responsibly manage and plan for the necessary servicing needs to facilitate this growth to build complete, sustainable and resilient communities. The County is projected to experience modest to steady permanent population growth in all local</li> </ul>



Recommendation 2: Plan for Permanent Population Growth Within the County	
	<p>municipalities over the long-term planning horizon. However, this growth is not evenly allocated as evidenced by a degree of variation in growth projections among the local municipalities, with some experiencing slow growth or near “no growth” forecasts.</p>
Recommended Actions	<ul style="list-style-type: none"> <li>• Policies of the County’s OP will need to reflect and be consistent the population growth projections as determined through the GMS over the long-term planning horizon.</li> <li>• In addition to identifying growth projections for each local municipality, policies of the Bruce County OP may also include more specific growth projections of the Primary and Secondary Urban Communities, Hamlet communities, and rural areas. For example, Tables 1 and 2 of Policy 4.4.2.7 should be comprehensively updated in this regard.</li> <li>• Saugeen Shores, North Bruce Peninsula and Huron-Kinloss are projected to experience a moderate rate of annual permanent population growth over the planning horizon, being 1.4%, 1.1% and 1.0%, respectively.</li> <li>• Kincardine, South Bruce Peninsula, Brockton, Arran-Elderslie and South Bruce are forecasted to grow at a relatively slower annual rate, at 0.6%, 0.5%, 0.4% and 0.1%, respectively.</li> <li>• Policies of the County’s OP will therefore need to recognize and provide direction regarding the disproportionate nature of growth projections among the local municipalities, including that some municipalities should plan for modest and in some cases near “no growth” scenarios over the planning horizon. In this regard, policies of the Bruce County OP be considerate of specific economic development tools and objectives that are context specific, including the role of Community Improvement Plans (CIPs) to facilitate and encourage economic activity where appropriate and to further advance the economic development objectives of the OP.</li> <li>• While population and employment growth will be directed to the County’s Primary and Secondary Urban Communities, it recognized that the County’s Hamlet Areas and remaining rural lands have role to play in accommodating residential growth and sustainable economic development, subject to provincial and County planning policies.</li> <li>• Where the GMS has identified permanent rural population growth, policies of the Bruce County OP will need to be consistent with the Provincial policy regarding the provision of unjustified and/or uneconomical expansion of infrastructure while establishing a clear policy framework for</li> </ul>

Recommendation 2: Plan for Permanent Population Growth Within the County	
	<p>assessing any long-term impacts of private water and sanitary servicing systems.</p> <ul style="list-style-type: none"> <li>Furthermore, policies of the Bruce County OP need to be consistent with the PPS, 2020, by requiring development that is compatible with the rural landscape, can be sustained by rural service levels, and is appropriate for existing infrastructure or infrastructure that is planned for.</li> </ul>

Recommendation 3: Plan for Seasonal Population Growth Within the County	
<b>Opportunities and Challenges</b>	<ul style="list-style-type: none"> <li>The County is afforded an incredible natural setting with many recreational opportunities, and it is therefore a desirable location for seasonal residences. Similar to permanent population growth, identifying seasonal population growth enables municipalities to better plan for and manage a range of physical infrastructure and community service policy considerations. Seasonal population growth within the County is projected over the planning horizon within the local municipalities of Northern Bruce Peninsula, South Bruce Peninsula, Saugeen Shores, Huron-Kinloss, Kincardine, and Arran-Elderslie.</li> </ul>
<b>Recommended Actions</b>	<ul style="list-style-type: none"> <li>Policies of the Bruce County OP may include seasonal population growth projections to provide direction to local municipalities and to inform growth-related policy considerations related to municipal infrastructure/ servicing (where seasonal growth is forecast within the Urban Communities) as well as monitoring of seasonal growth trends and development impacts to the County and local municipalities.</li> <li>Through the review of the Bruce County OP, consideration may be given to strengthening the seasonal-to-permanent conversion policies. Currently, the OP establishes conversion policies that apply to the Rural Recreational Area and the Inland Lake Development Area land use designations. However, the GMS has identified some seasonal growth within the Urban Communities of the County. Through consultation with the local municipalities, consideration may be given to establishing a more robust conversion policy framework that applies to the Urban Communities to appropriately manage and provide direction on growth projection and servicing implications where conversions may occur.</li> </ul>

Recommendation 4: Update County-wide Housing Projections	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>The Homes Discussion Paper identifies that the County faces a combination of challenges related to the provision of housing that is both affordable and accessible. Housing is not only an area of Provincial policy interest that the County's OP must be consistent with; planning for a range for housing contributes to building complete communities and enhancing economic development opportunity. Through the County's new OP, there is an opportunity to be develop a policy framework that is responsive to existing and new housing challenges that may emerge over the planning horizon. This requires policies that contemplate an appropriate range and mix of housing options and densities to meet projected market-based and affordable housing needs of the regional market area.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>The County's in-effect OP establishes specific housing projections among the local municipalities. Updated policies regarding housing forecasts are therefore required to be consistent with the housing projections over the planning horizon as determined through the GMS.</li> <li>Policies of the Bruce County OP should continue to direct future housing growth to the designated settlement areas where full municipal servicing is available or planned for, as well as locations where appropriate levels of related infrastructure and public services are or will be available to support current and projected needs as determined through the GMS.</li> <li>Housing growth is not forecast evenly across the local municipalities. Specifically, Saugeen Shores (43%), Kincardine (16%), Huron-Kinloss (12%) and Brockton (9%) are projected to accommodate 80% of the County's projected permanent population growth to the year 2046. The municipalities of South Bruce Peninsula (8%), Brockton (8%), Arran-Elderslie (5%) and South Bruce (5%) account for the remaining 20% of overall permanent housing growth over the same long-term planning horizon.</li> <li>Provincial policy requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through residential intensification and redevelopment, and if necessary, lands which are designated and available for residential development. Policies of the Bruce County OP should therefore be updated providing direction to local municipal OPs to ensure consistency with the PPS, 2020 in this regard.</li> </ul>

Recommendation 4: Update County-wide Housing Projections	
	<ul style="list-style-type: none"> <li>• The PPS, 2020 also requires planning authorities to “maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans” (1.4.1.b). Policies of the Bruce County OP should therefore be updated providing direction to local municipal OPs to ensure consistency with the PPS, 2020 in this regard.</li> <li>• The PPS, 2020 also requires land and unit supply maintained by lower-tier municipalities to be based on and reflect the allocation of population and units as determined by the upper-tier municipality (1.4.2). On this basis, the Bruce County OP should establish updated policies that contemplate housing allocations among local municipalities to accommodate housing projections to the year 2046.</li> <li>• Through the review of the in-effect Bruce OP, a refined policy framework may be developed to provide continued direction to local municipalities to establish OP policies that encourage a range of housing types, densities and options in consideration of the updated housing projections to the year 2046. A refined policy framework should be considerate of the Plan the Bruce: Homes (November 2020) discussion paper which contemplates a broad range of policy options to increase the supply and mix of homes available to current and future residents of the County.</li> <li>• The existing policy framework established by the Bruce County OP regarding affordable housing may be updated to be consistent with Policy 1.4.3(a) of the PPS, 2020. This includes an approach that is “market-based” and establishes minimum targets for housing that is affordable to low- and moderate-income households, as well as establishing a clear definition of affordable that is consistent with the PPS, 2020 and is considerate of the County’s definition of the “regional market area”.</li> </ul>

Recommendation 5: Promote and Plan for Residential Intensification	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>• Residential intensification contributes to building complete communities, makes more efficient use of existing infrastructure and public services, and minimizes adverse impacts to the natural environment and agricultural land. The Province establishes clear policy direction to guide residential</li> </ul>

Recommendation 5: Promote and Plan for Residential Intensification	
	<p>intensification, including that sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 25 years. Further, sufficient land within settlement areas shall be made available through intensification and redevelopment and, if necessary, designated growth areas. On this basis, there is an opportunity for the Bruce County OP to establish enhanced policy direction regarding residential intensification within the local municipalities generally, and the Primary and Secondary Urban Communities more specifically.</p>
Recommended Actions	<ul style="list-style-type: none"> <li>• Based on the GMS, policies of the Bruce County OP should establish a minimum County-wide intensification target of 10%.</li> <li>• The Bruce County OP may establish minimum residential intensification targets in Primary Urban Communities that are consistent with the existing intensification targets of the local OPs. For Primary Urban Communities where a minimum intensification target has not been established, an intensification range of 10% to 20% may be contemplated. The exact intensification target should take into consideration the residential growth projections as determined through GMS for these Primary Urban Communities.</li> <li>• The Bruce County OP may establish minimum residential intensification targets of 0% to 10% for Secondary Urban Communities. The policy framework may contemplate that in some Secondary Urban Communities, minimum growth is projected, and no new medium or high-density development is identified.</li> <li>• In the absence of a “built boundary”, it is recommended that intensification be defined based on land use density and building typology. For the purpose of implementing the minimum County-wide intensification target of 10%, policies of the Bruce County OP may define intensification as “high density” development. On this basis, an overall minimum of 10% of new residential development within the County is required to be “high density”, subject to the flexibility of meeting the overall intensification target that is afforded to Primary Communities and Secondary Communities.</li> <li>• The Bruce County OP may establish policies that direct local municipalities to develop an intensification strategy that is consistent with the GMS and County’s OP. The intensification strategies should be implemented through local planning processes, include OP Reviews. The intensification strategies</li> </ul>

## Recommendation 5: Promote and Plan for Residential Intensification

	<p>should also be considerate of Provincial policy by contemplating a range of housing options, specifically in reference to providing for an appropriate range and mix of housing options and densities to meet projected market-based and affordable housing needs of current and future residents of the regional market area.</p> <ul style="list-style-type: none"> <li>• Local intensification strategies may also identify other opportunities to facilitate appropriate growth such as: permitting a broader range of housing types that are responsive to market demand; explore opportunities to bring certainty and some flexibility to the development approval process (such as the Community Planning Permit System); the administration of financial incentives to advance the goals and objective of local OPs (such as CIPs); and disposing of surplus public land for the purpose of residential development, including affordable/attainable housing.</li> <li>• Permitting two additional dwelling units as an accessory to some residential buildings is now required to be permitted through the policies of an OP by Section 16(3) of the <i>Planning Act</i>. O. Reg. 299/19 establishes further specific land use planning direction regarding additional dwelling units. Policies of the in-effect Bruce County OP contemplate additional dwelling units through “Garden Suites” and “Secondary Suites” under Section 4.4.4.1.x and 4.4.4.1.xi, respectively. Through the County’s OP Review, consideration may be given to review and/or update these policies to ensure the provisions of the <i>Planning Act</i> and O. Reg 299/19 are satisfactorily implemented, to achieve consistency with the PPS, 2020, and to establish appropriate policy direction to local municipal OPs in this regard. On this basis, a review of the County’s in-effect policy framework and the <i>Planning Act</i> provisions provide an opportunity to contribute to intensification and may provide for an appropriate range and mix of housing options and densities required to meet projected growth over the planning horizon. A revised policy framework for additional dwelling units will also need to contemplate the provision of appropriate servicing, as well as providing direction to an implementing zoning framework, such as land use permissions and lot and building standards, for example.</li> <li>• The GMS identifies projected population and housing growth forecasts to the year 2046. Policies of the County’s OP should provide more specific direction to local municipalities regarding achieving minimum densities to ensure appropriate</li> </ul>
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Recommendation 5: Promote and Plan for Residential Intensification	
	accommodation of residential growth over the long-term planning horizon. This may include specific housing unit targets as identified by the GMS.

Recommendation 6: Define a Regional Market Area	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>There are a range of land use planning matters that upper-tier municipalities are uniquely positioned to address through broad, regionally based policy frameworks. These matters may include, for example, housing projections and targets, housing options, residential land supply, residential intensification, and affordable housing. Under Provincial policy, the Bruce County OP will need to contemplate a definition of “regional market area” that is reflective of geographies that demonstrate social and economic synergies. Developing a definition for regional market area enables policies of the Bruce County OP to contemplate land use planning matters, such as housing options and affordable housing, based on certain geographies of the County that share certain demographic and economic characteristics but are otherwise distinct from one another.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>The Province defines “regional market area” in reference to an area that has a high degree of social and economic interaction. The upper- or single-tier municipality, or planning area, will normally serve as the regional market area. However, where a regional market area extends significantly beyond these boundaries, then the regional market area may be based on the larger market area. Where regional market areas are very large and sparsely populated, a smaller area, if defined in an OP, may be utilized.</li> <li>Policies of the Bruce County OP will need to contemplate a definition of “regional market area” that is considerate of applicable geographies that demonstrate social and economic synergies, while establishing an implementable policy framework regarding housing projections and targets, housing options, residential land supply, residential intensification, affordable housing and an associated definition of affordable.</li> <li>It is recommended that “regional market area” be defined based on the in-effect “hub model” of the County, being the Peninsula Hub, Lakeshore Hub and Inland hub. The “hub model” is representative of the geographic size of the County, as well as the economic and social diversity between</li> </ul>



Recommendation 6: Define a Regional Market Area	
	<p>local municipalities. On this basis, each of the three geographies of the “hub model” are understood to share demographic and economic synergies, and therefore may be consistent with the PPS, 2020 definition in this regard, while also forming a basis to develop an implementable OP policy framework regarding matters of provincial interest. The Hubs are categorized by the following:</p> <ul style="list-style-type: none"> <li>• Peninsula Hub: Arran-Elderslie, South Bruce Peninsula, and Northern Bruce Peninsula;</li> <li>• Lakeshore Hub: Saugeen Shores and Kincardine; and</li> <li>• Inland Hub: South Bruce, Brockton, and Huron-Kinloss.</li> </ul>
Recommendation 7: Responsibly Manage Municipal Infrastructure	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>• Good growth management requires that municipalities understand and plan for municipal servicing and infrastructure requirements over the long-term planning horizon. Also referred to as asset management, planning for growth within the context of municipal servicing and infrastructure contributes to building sustainable, resilient, efficient and complete communities in a financially responsible manner. The GMS has identified that the County will realize modest to steady growth over the planning horizon which may require maintaining or enhancing servicing capacity in some areas. The Bruce County OP will therefore need to establish a policies that provide direction to local municipalities regarding the provision of available and planned servicing to accommodate future growth through an efficient and sustainable framework.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>• The Province requires that planning for servicing shall accommodate forecasted growth through a policy framework that promote the efficient use of land and makes best use of existing municipal servicing and infrastructure.</li> <li>• The Province also requires that municipal servicing is also required to be provided in a manner that is sustainable, recognizes the impacts of climate change, and is feasible and financially viable, and protects human health, safety and the natural environment.</li> <li>• Consistent with Provincial policy, the Bruce County OP should continue to direct most growth to areas where full municipal servicing or communal servicing systems are available and where there is capacity. Growth in areas where only private water supply or sanitary is available should only be permitted</li> </ul>

Recommendation 7: Responsibly Manage Municipal Infrastructure	
	<p>in certain land use designations or for certain permitted uses. Otherwise, private water and sanitary systems should continue to be limited or restricted by policies of the OP.</p> <ul style="list-style-type: none"> <li>• Forecasts identified by the GMS should form the basis for identifying future municipal servicing needs as provided by the local municipalities over the long-term planning horizon. The County will need to continually monitor, evaluate and coordinate with local municipalities to ensure that sufficient municipal servicing infrastructure within the Urban Communities is available or planned for in order for growth to be appropriately serviced.</li> <li>• Policies of the Bruce County OP should continue to direct growth in a planned, orderly and phased manner to ensure existing or new infrastructure and services are sufficient to meet the forecast growth needs of local municipalities as identified through the GMS.</li> <li>• Policies of the County's OP should continue to provide direction for the eventual availability of full municipal services in all Urban Communities as the preferred method of infrastructure and servicing.</li> <li>• Policies of the Bruce County OP should continue to provide direction to develop multi-year municipal servicing plans as a component to local OP review processes. This may be informed by the findings of the GMS to ensure development can be accommodated by available or planned servicing infrastructure within the local municipalities over the long-term planning horizon. For local municipalities that are forecast to realize slow growth or near "no growth" scenarios, policies of the Bruce County OP may provide direction to ensure existing municipal infrastructure is sustainable and resilient over the long-term planning horizon.</li> </ul>

Recommendation 8: Develop a Robust Plan Monitoring and Evaluation Framework	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>• The Good Growth report provides critical input to long-range planning by identifying any future growth, land supply and land demand which ultimately informs a comprehensive policy framework to manage change over the planning horizon. Policies of the County's OP should therefore be strengthened to include a more robust plan monitoring and evaluation framework that emphasizes data collection and sharing in collaboration between the County and local municipalities.</li> </ul>

Recommendation 8: Develop a Robust Plan Monitoring and Evaluation Framework	
	<p>This policy consideration contributes to the responsible and sustainable management of growth and change over the long-term planning horizon, and requires an understanding of County and local municipality market conditions, development trends, and land consumption rates.</p>
Recommended Actions	<ul style="list-style-type: none"> <li>• Policies providing direction on plan monitoring and evaluation are required to regularly evaluate the forecasts of the GMS (inclusive of housing and land supply) as implemented through the Bruce County OP Relevant policies should establish direction to undertake a regular review and update of the growth forecasts in consultation with local municipalities to ensure the County is providing direction to local municipalities for growth and change in a manner that is consistent with the PPS, 2020, and that includes land use management practices that are sustainable over the long-term planning horizon. Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the County and local municipalities to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy, demographic and economic factors that influence growth and change over the long-term planning horizon.</li> <li>• Policies of the Bruce County OP may establish a clearer framework for land use data management and sharing between the County and local municipalities. This may include policy direction to develop a robust data management infrastructure, to ensure the data and metrics are consistent among the local municipalities, and for the County to develop and deliver this digital infrastructure as a strategic opportunity to enhance plan monitoring and evaluation over the long-term planning horizon.</li> </ul>

## 7.2 Non-Residential Policy Matters

The primary objective of the Bruce County GMS is to provide a long-term vision for the County which ensures that its area municipalities continue to develop in a competitive and sustainable manner which is well balanced between future population and employment growth. Fundamental to this objective is an adequate supply and market choice of employment lands within well-defined designated industrial areas located throughout the County to accommodate demand over the next 25 years and beyond. Employment Areas should be developed in a manner which allows the County's Primary and Secondary Urban Communities, hamlets and rural

areas to build on past successes, while further enhancing the economic base through continued growth in a diverse range of employment sectors.

The following policy recommendations and action items support the guiding principles of the Bruce County GMS and build on the existing provincial, County and area municipal planning policy framework. Each strategic recommendation outlines the current issues and opportunities associated with it, as well as policy or process-based actions for Bruce County to consider in its land-use and economic development planning activities.

Recommendation 9: Establish Consistent Employment Area Delineations	
<b>Opportunities and Challenges</b>	<ul style="list-style-type: none"> <li>Section 4.5.2. of the Bruce County OP currently recognizes all industrial lands as Employment Areas. Lands designated as “Business Park” are also defined as Employment Areas. The PPS, 2020 defines Employment Areas as “areas designated in an OP for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices and associated retail and ancillary facilities.” Under the current Bruce County OP, industrial lands that do not accommodate a cluster of business and economic activity are still recognized as Employment Areas.</li> </ul>
<b>Recommended Actions</b>	<ul style="list-style-type: none"> <li>Establish clear delineation of Employment Areas throughout the County, capturing clusters of business and economic activity.</li> <li>Refined Employment Area delineations will allow the County to form a hierarchy of industrial lands, providing a greater ability to plan for non-residential growth.</li> </ul>

Recommendation 10: Continue to Plan for Future Employment Lands Development within Bruce County	
<b>Opportunities and Challenges</b>	<ul style="list-style-type: none"> <li>As identified in Residential and Non-Residential Land Needs, 2021 to 2046, the County is anticipated to absorb a total of 158 net ha (390 net acres) of land within its Employment Areas over the next 25 years. While there is a sufficient supply of serviced and/or serviceable land within most of the County’s industrial areas, employment land shortfalls have been identified in the Saugeen Shores Urban Community.</li> </ul>
<b>Recommended Actions</b>	<ul style="list-style-type: none"> <li>Expand the supply of designated Employment Lands within the Saugeen Shores Urban Community by a minimum of 20 gross ha (35 gross acres) within the next 10+ years.</li> <li>In Saugeen Shores, the precise delineation of the settlement area boundary expansion may occur through the County’s OP</li> </ul>

Recommendation 10: Continue to Plan for Future Employment Lands Development within Bruce County	
	Review in consultation with the local municipality, while being consistent with the PPS, 2020 (Policy 1.1.3.8).
Recommendation 11: Ensure that Employment Lands are Well Adapted to Structural Changes Occurring in the Evolving Macro-Economy	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Structural changes occurring in the macro economy pose potential challenges and opportunities for future growth on Employment Lands in Bruce County. Given evolving trends in the Southern Ontario economy towards the knowledge-based sector, Bruce County will need to encourage and accommodate a wide range of business service and office uses in Employment Areas where appropriate.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>Recognize the importance of employment lands in accommodating knowledge-based sectors in addition to traditional industrial sectors.</li> <li>Consider establishing a distinct industrial designation which caters to office and prestige industrial employment uses in a business park setting. Such a designation may be warranted at select gateway locations within one or more of County's urban industrial areas.</li> </ul>
Recommendation 12: Provide Stronger Direction Regarding Employment-Supportive Uses in Employment Areas	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Recognizing the recent structural change in the economy, there has been a shift in planning philosophy that calls for developing Employment Areas which provide a wider range of employment supportive uses and amenities, generally clustered at strategic locations (i.e. at major intersections, on the fringe of Employment Areas or transition areas). The intention of employment supportive uses in Employment Areas should be to serve the needs of employers within Employment Areas as opposed to the broader population. For this reason, major retail is not recommended in Employment Areas, unless otherwise specified.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>Introduce more defined policy direction in the County's and area municipalities' OPs to outline the goals and objectives related to employment-supportive uses in Employment Areas (e.g. non-industrial, non-office uses should be of limited scale, or focused on serving businesses and employees in the Employment Areas). Such uses should minimize potential land-use conflicts and support a viable mix of commercial and industrial land uses.</li> </ul>

Recommendation 12: Provide Stronger Direction Regarding Employment-Supportive Uses in Employment Areas	
	<ul style="list-style-type: none"> <li>Consider the introduction of more defined criteria or descriptions regarding the appropriate type, size and location of complementary non-industrial uses in Employment Areas (e.g. eating establishments, daycares, personal and health care services and smaller-scale, service-oriented businesses) at strategic and accessible locations in existing and future Employment Areas, where appropriate.</li> </ul>
Recommendation 13: Develop a General Marketing Strategy to Promote and Develop the County's Employment Areas	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Bruce County's Employment Areas are important to the regional economy and account for a significant percentage of jobs in the County. To ensure the success of Bruce County's Employment Areas, marketing efforts must be geared towards both the broader strengths of the County as well as specific target sector investment attraction efforts.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>Consider a range of promotional tools and incentives which can be used by the County to inform prospective industries about the opportunities in Bruce County and its communities.</li> <li>Assess and evaluate the municipal role in employment lands development in Bruce County.</li> <li>Explore opportunities to establish incubator facilities within Bruce County to promote and encourage the development of start-up industries, particularly related to knowledge-based sectors and other export-based emerging industry clusters.</li> </ul>
Recommendation 14: Continue to Provide Broader Market Choice on Bruce County Employment Lands	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>While Bruce County has a relatively large supply of designated Employment Lands to accommodate long-term demand in most locations, the County's existing supply of larger vacant employment parcels is limited.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>To ensure that the County's employment land supply levels are not unduly constrained, it is recommended that the County continue to strive to provide a minimum designated and serviced supply of at least five years at all times. This should include a range of site selection choices by parcel configuration, designation, zoning and location.</li> <li>Local municipalities and the County are encouraged to explore municipal development opportunities for the creation of shovel-ready site on Employment Lands, subject to a</li> </ul>



Recommendation 14: Continue to Provide Broader Market Choice on Bruce County Employment Lands	
	<p>review of development feasibility (i.e. return on investment analysis).</p> <ul style="list-style-type: none"> <li>Consider improving the marketability and feasibility of developing vacant Employment Lands by undertaking necessary pre-screening studies and assessments (e.g. servicing strategies, environmental studies, water protection requirements, archaeological assessment studies, etc.). provincial programs, such as the Investment Ready Certified Site Designation and Rural Economic Development Program (RED) can be utilized by municipalities for that purpose.</li> </ul>
Recommendation 15: Explore Opportunities for Intensification of Employment Lands within Urban Settlement Areas	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Future redevelopment, expansion and infill opportunities will continue to exist as the County's Employment Areas continue to mature and evolve. Intensification potential on occupied and underutilized Employment Lands is not well understood given uncertainties regarding the future intentions of existing landowners.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>Promote and facilitate intensification/infill opportunities in existing Employment Areas.</li> <li>Explore opportunities for infill and redevelopment in mature industrial areas.</li> <li>Work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assessing feasibility of development.</li> <li>Area municipalities and the County are encouraged to explore redevelopment opportunities on brownfield industrial sites.</li> <li>Explore public-private partnerships which would encourage intensification and infill development opportunities within Employment Areas.</li> </ul>
Recommendation 16: Protect Employment Lands from Conversion to Non-Employment Uses	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>The conversion of employment lands to non-employment uses negatively impacts Bruce County's economy in several ways: <ul style="list-style-type: none"> <li>It erodes the County's finite supply of designated Employment Lands;</li> <li>It potentially fragments the existing Employment Land supply; and</li> <li>It generally impedes the County's potential to accommodate "basic" or export-based job opportunities.</li> </ul> </li> </ul>

Recommendation 16: Protect Employment Lands from Conversion to Non-Employment Uses	
	<ul style="list-style-type: none"> <li>The In very specific cases, through a municipal comprehensive review, the conversion of employment lands to non-employment uses may be justified from a land-use planning and economic perspective.</li> <li>The County OP does not provide direction with respect to how subject industrial sites of interest within Employment Areas (i.e. non-employment development applications) are to be evaluated from a planning and economic standpoint for conversion to a non-employment use.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>Develop an approach to evaluating requested conversions on Employment Lands. This evaluation approach should establish criteria which focuses on site-specific factors such as location, site size, configuration, marketability, future expansion potential, etc.</li> </ul>

Recommendation 17: Continue to Recognize Opportunities for Agricultural-related Industrial and Commercial Uses on Agricultural Lands Subject to Local OP Policies	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>The agricultural base represents a significant component of Bruce County's local economy. The agriculture and agri-food system encompasses several industries including the farm input and service supplier industries, primary agriculture, food and beverage processing, food distribution, retail, wholesale and food service industries.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>Continue to recognize opportunities for agricultural-related industrial and commercial uses which are permitted in agricultural areas subject to local OP policies.</li> </ul>

Recommendation 18: Plan for the Vision of the Urban Employment Areas by Mitigating Land-Use Compatibility Conflicts	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Section 5.2.3.3. of the Bruce County OP only discusses Employment Area land-use compatibility within the context of the Bruce Energy Centre Industrial Park. There is no clear definition of permitted land uses within Employment Areas and what constitutes a land-use compatibility issue.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>The County should establish policy which details the variety and range of uses which are permitted within Urban Employment Areas.</li> <li>Generally, it is recommended that the County encourage employment uses in Urban Employment Areas which require full municipal services and are compatible with the surrounding urban land uses.</li> </ul>



Recommendation 18: Plan for the Vision of the Urban Employment Areas by Mitigating Land-Use Compatibility Conflicts	
	<ul style="list-style-type: none"> <li>Continue to further mitigate land-use compatibility conflicts as part of the County and local municipal planning approvals process.</li> </ul>
Recommendation 19: Encourage Office Development in Downtowns and Support Smaller-Scale Office Opportunities in Designated Employment Areas.	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Across Canada, the general approach by municipalities has been to direct larger office developments within the downtown core where multi-modal transportation options are the greatest to support live/work opportunities.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>Future opportunities for free standing office development should be encouraged and directed to downtown areas.</li> <li>Commercial and industrial (e.g. manufacturing, assembly and warehousing) with office uses, training facilities and showcase rooms/ancillary retail are increasingly integrated on-site. Operations such as these are typically not appropriate in downtown areas and should be directed towards Employment Areas.</li> <li>Further, Employment Areas provide opportunities to accommodate multi-use facilities that downtown areas cannot, such as larger industrial operations adopting a campus-style setting which requires surface parking and future expansion potential.</li> </ul>
Recommendation 20: Conduct a Commercial Land Needs Study which Specifically Addresses the County's Retail Requirements and Commercial Structure.	
Opportunities and Challenges	<ul style="list-style-type: none"> <li>Through the GMS exercise, focus has been directed to residential growth within the County's Urban Communities as well as a focus on development within the County's Urban industrial lands. This leaves a gap in the County's understanding of its retail requirements and commercial structure.</li> </ul>
Recommended Actions	<ul style="list-style-type: none"> <li>To better understand these gaps, a commercial land needs study could be undertaken.</li> <li>The results of a commercial land needs study would provide the County with sufficient background to plan for a range of non-residential uses.</li> </ul>

## 8 Conclusions

This study provides a comprehensive assessment of the County's long-term population, housing and employment growth potential and associated urban land needs to the year 2046, within the context of County-wide development trends regional economic growth drivers and available urban land supply. Building on this technical analysis, the GMS has outlined a number of residential and non-residential planning policy recommendations which will inform the County's OP Review.

Overall, the findings of this GMS have demonstrated the following:

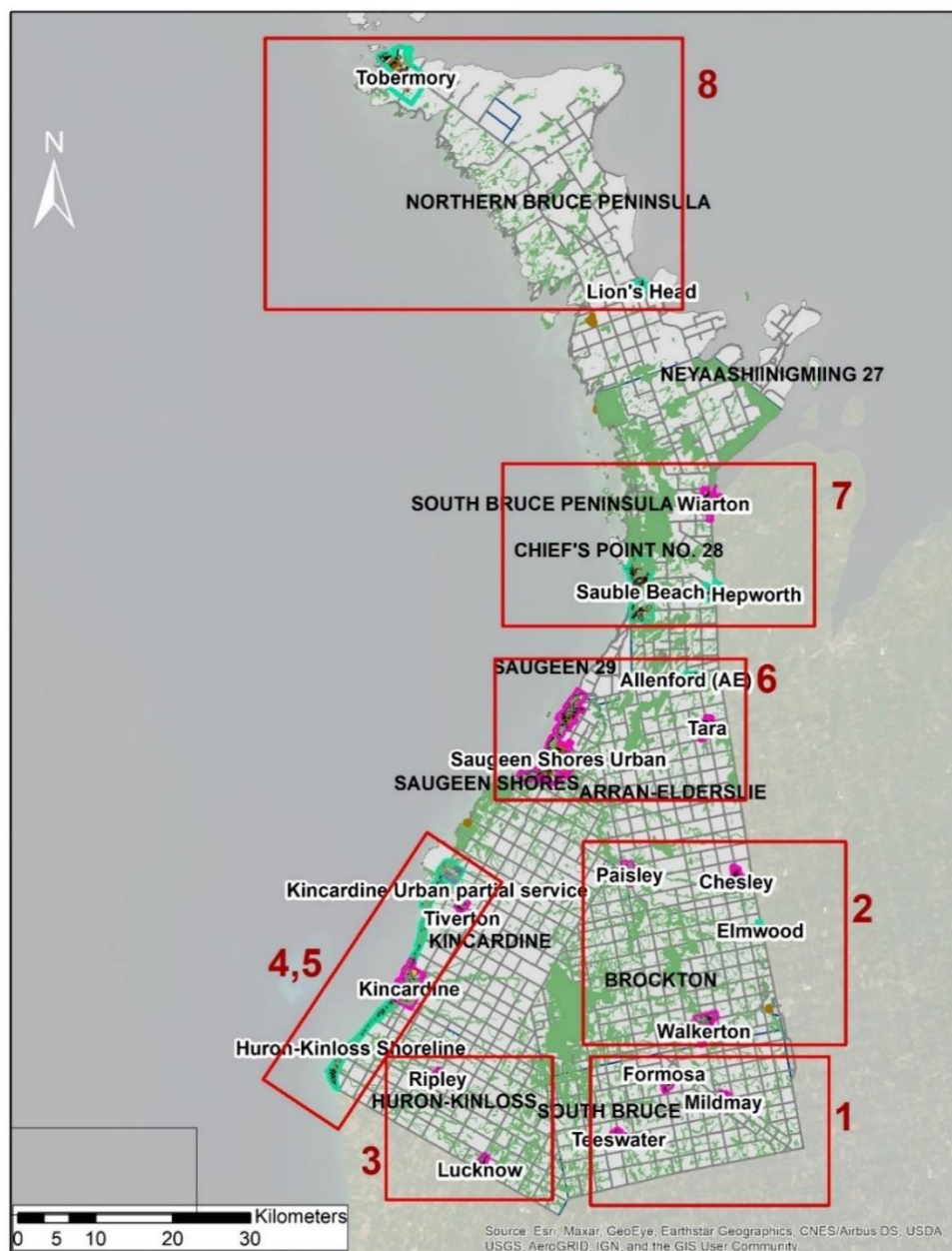
1. Overall, Bruce County is anticipated to experience steady population and employment growth over the long-term. The County's long-term growth outlook has strengthened relative to previous population and employment projections which have been prepared for the County over the past decade. This relative strength is anticipated to be driven by a combination of local economic opportunities which are partially driven by the Bruce Power refurbishment, as well as the continued outward migration from the GGH.
2. Over the past year, COVID-19 has accelerated residential growth pressures across Bruce County, largely from GGH. In addition to its broader impacts on the economy, COVID-19 has also accelerated changes in work and commerce as a result of technological disruptions that were already in play prior to the pandemic.
3. Residential and non-residential development activity is anticipated to be particularly strong over the next 10 to 15 years, driven by the Bruce Power refurbishment as well as continued steady in-migration from the GGH.

4. Population and employment growth is not anticipated to be uniform across the County, with higher growth levels anticipated within the County's larger settlement areas and slower to near no-growth anticipated in some of the County's Secondary Urban Communities and Hamlets.
5. Over the next several decades a greater share of residents are anticipated to live in Urban Communities within the County, given the services and amenities that these areas provide. This trend is also consistent with provincial and County planning policy. The trend towards increased urbanization will require a broader range of housing options by type and tenure to be provided to residents of all ages and income levels, including young adults and families.
6. The County's population is aging. By 2046, 34% percent of the County population will be 65+ years of age or older, up from 21% in 2016. This will require a broader range of housing options to be provided to older residents across a range of income levels.
7. The County has a sufficient supply of designated urban residential lands to accommodate anticipated development through residential intensification and new greenfield areas over the next 25 years.
8. All municipalities within the County have a sufficient supply of designated Employment Area lands to accommodate long-term needs, with the exception of the Town of Saugeen Shores. It is recommended that an Employment Area expansion of 20 gross ha (49 gross acres) is provided within the Municipality of Saugeen Shores to accommodate anticipated Employment Area land demand over the 25-year planning horizon.
9. The GMS forms a key input to developing a policy framework that directs how and where the County will grow and ensuring that matters of provincial interest are protected, including sustainable infrastructure and the wise management of land and resources. Responsibly managing this growth and change is a core function of land use planning and one that benefits from the broad input and perspectives of a community.

## Appendices

## Appendix A: Bruce County Vacant Residential and Non-Residential Supply Maps<sup>32</sup>

Figure A - 1: Bruce County Vacant Land Supply Inset Maps



<sup>32</sup> Without an Active Planning Act Application as of April 2020.



Figure A - 2: Bruce County - Vacant Residential and Employment Land Parcels (Inset 1)

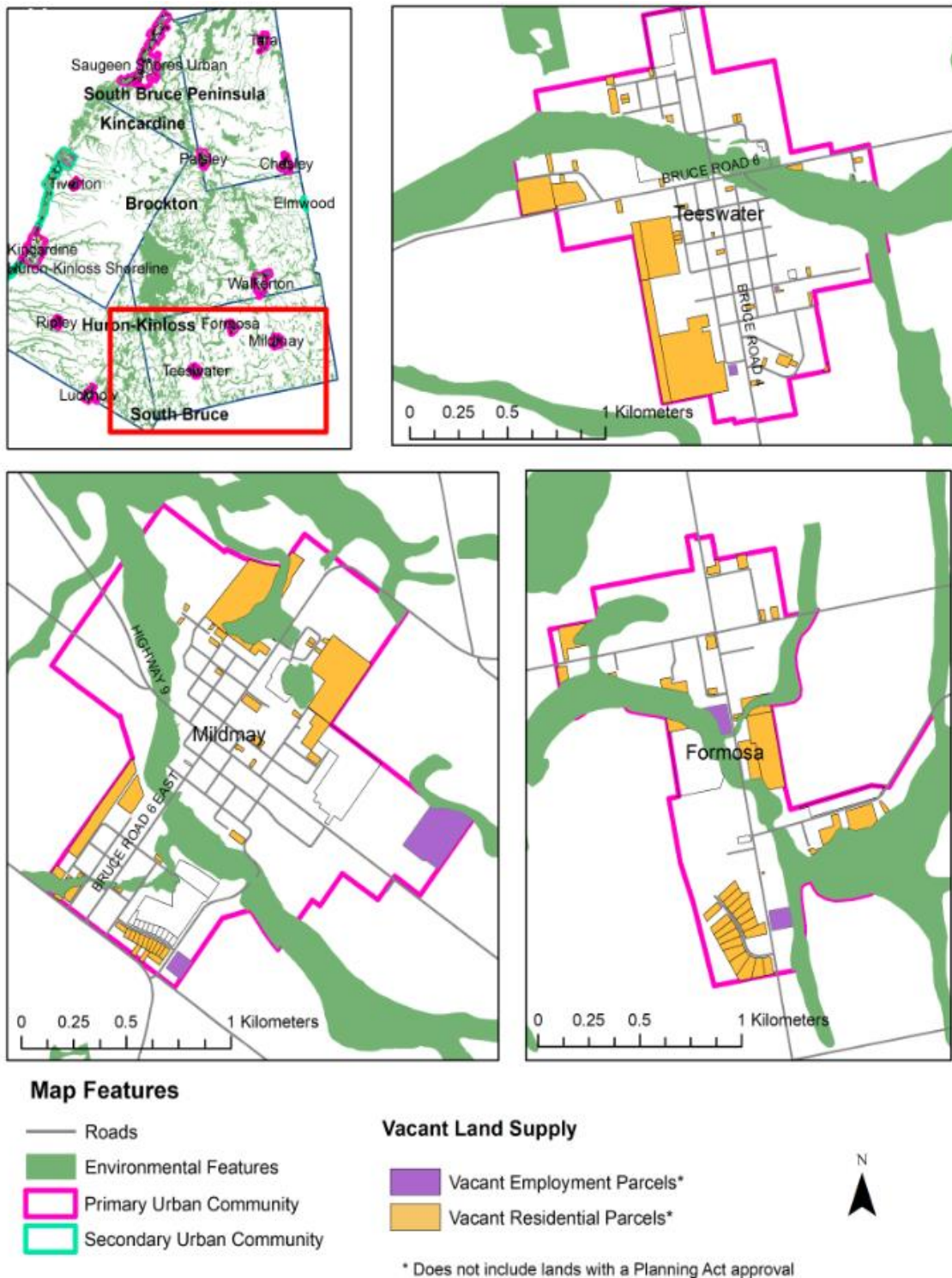


Figure A - 3: Bruce County - Vacant Residential and Employment Land Parcels (Inset 2)

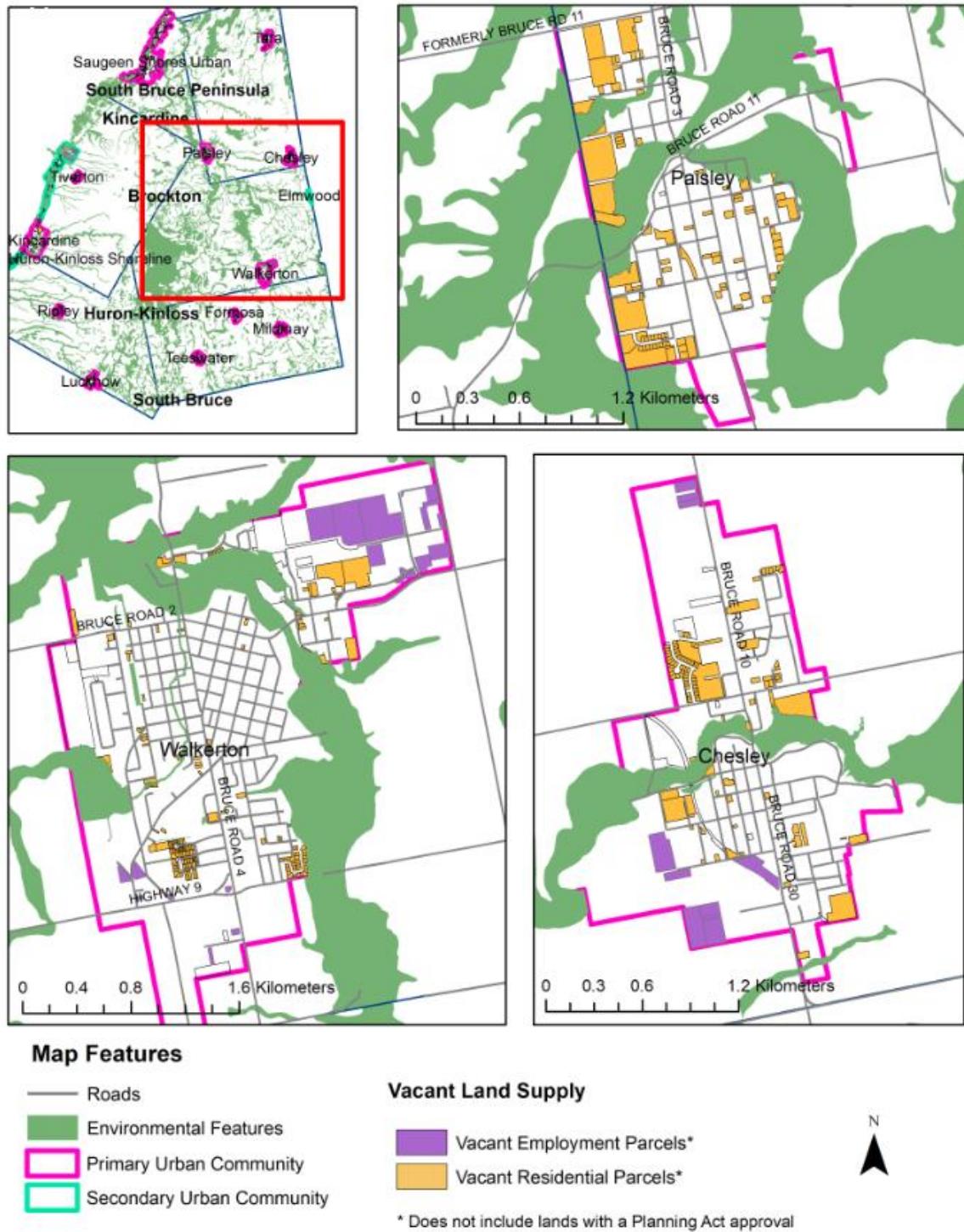
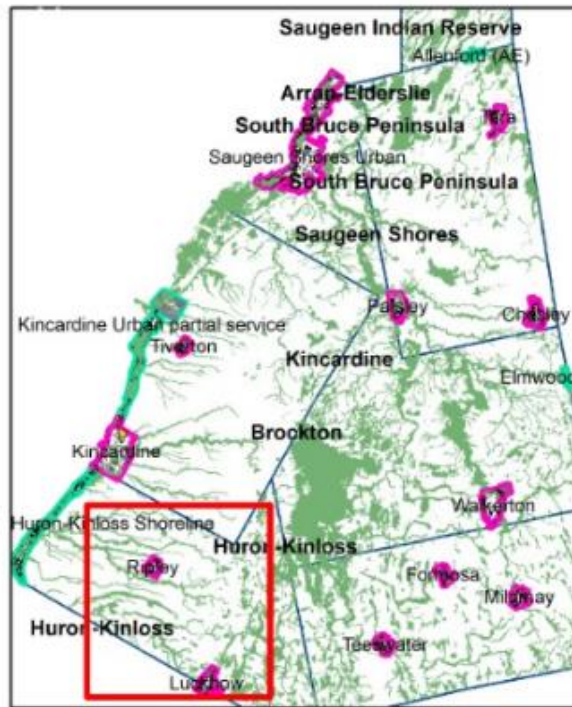


Figure A - 4: Bruce County - Vacant Residential and Employment Land Parcels (Inset 3)





### Map Features

- Roads
- Environmental Features
- Primary Urban Community
- Secondary Urban Community

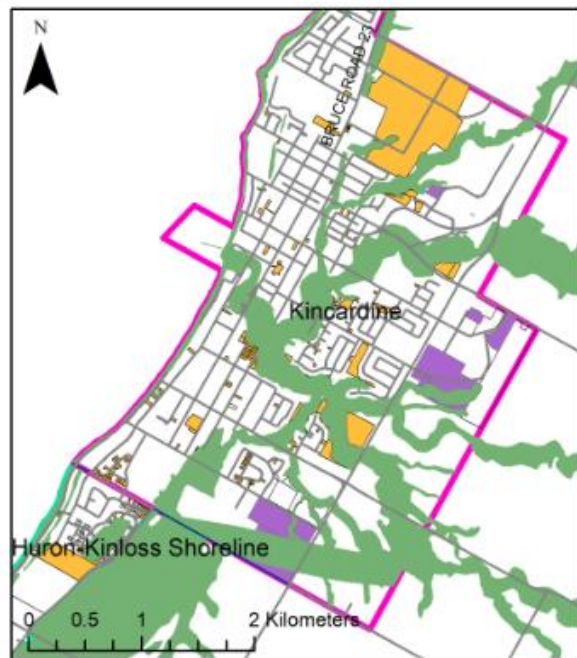
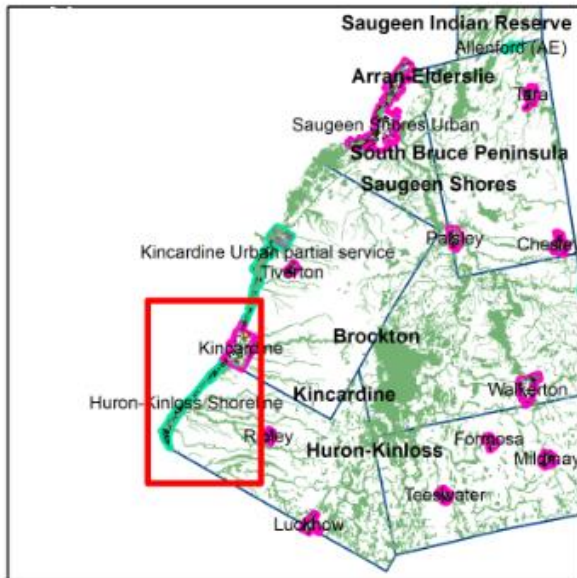
### Vacant Land Supply

- Vacant Employment Parcels\*
- Vacant Residential Parcels\*

\* Does not include lands with a Planning Act approval



Figure A - 5: Bruce County - Vacant Residential and Employment Land Parcels (Inset 4)



### Map Features

- Roads
- Environmental Features
- Primary Urban Community
- Secondary Urban Community

### Vacant Land Supply

- Vacant Employment Parcels\*
- Vacant Residential Parcels\*

\*Does not include lands with a Planning Act approval

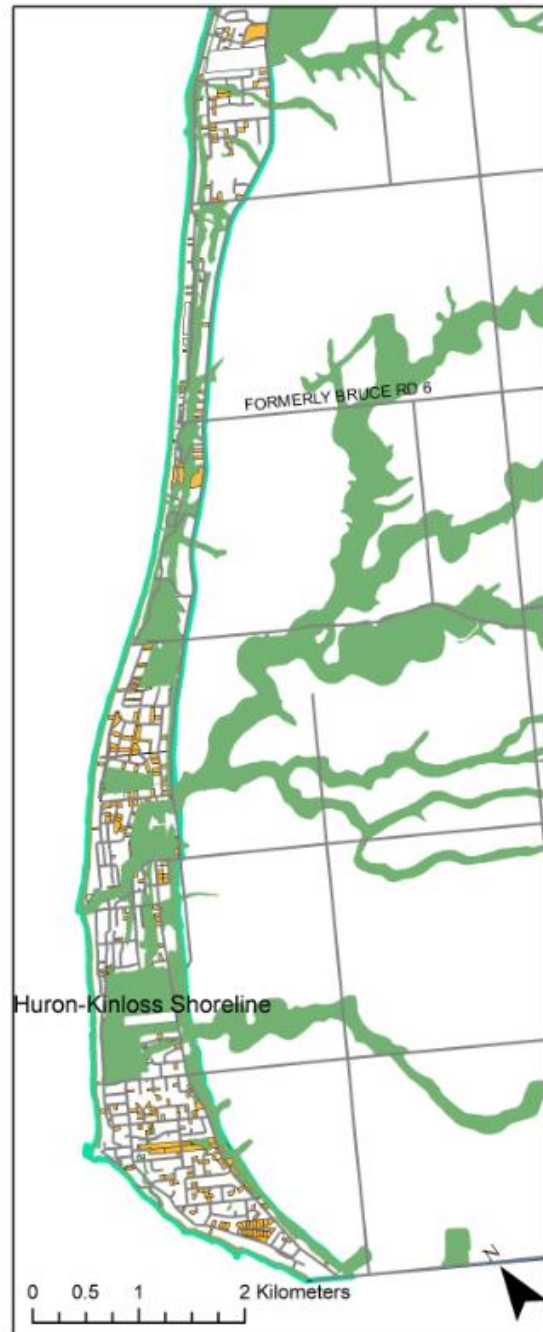
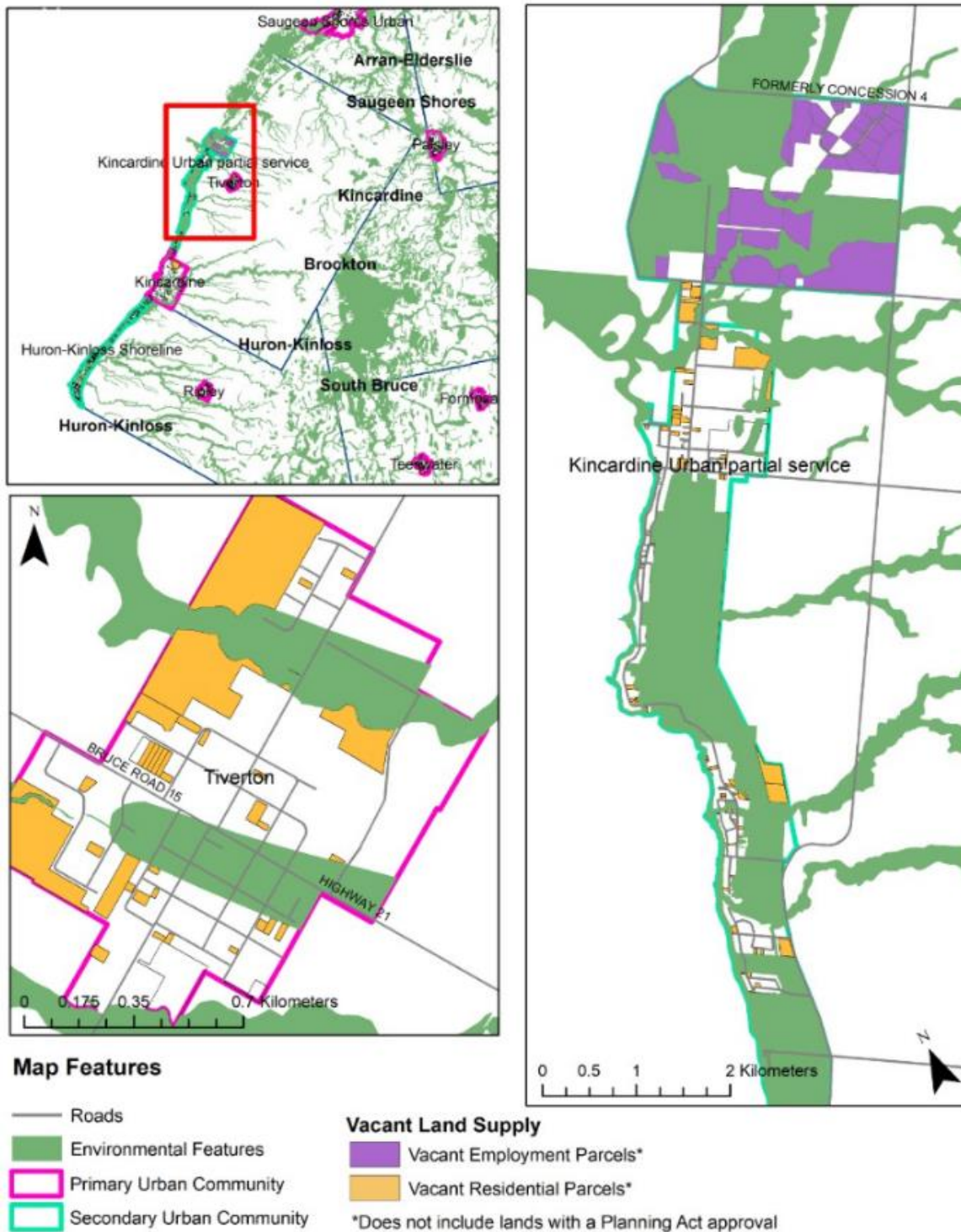




Figure A - 6: Bruce County - Vacant Residential and Employment Land Parcels (Inset 5)



**Map Features**

- Roads
- Environmental Features
- Primary Urban Community
- Secondary Urban Community

**Vacant Land Supply**

- Vacant Employment Parcels\*
- Vacant Residential Parcels\*

\*Does not include lands with a Planning Act approval

Figure A - 8: Bruce County - Vacant Residential and Employment Land Parcels (Inset 7)



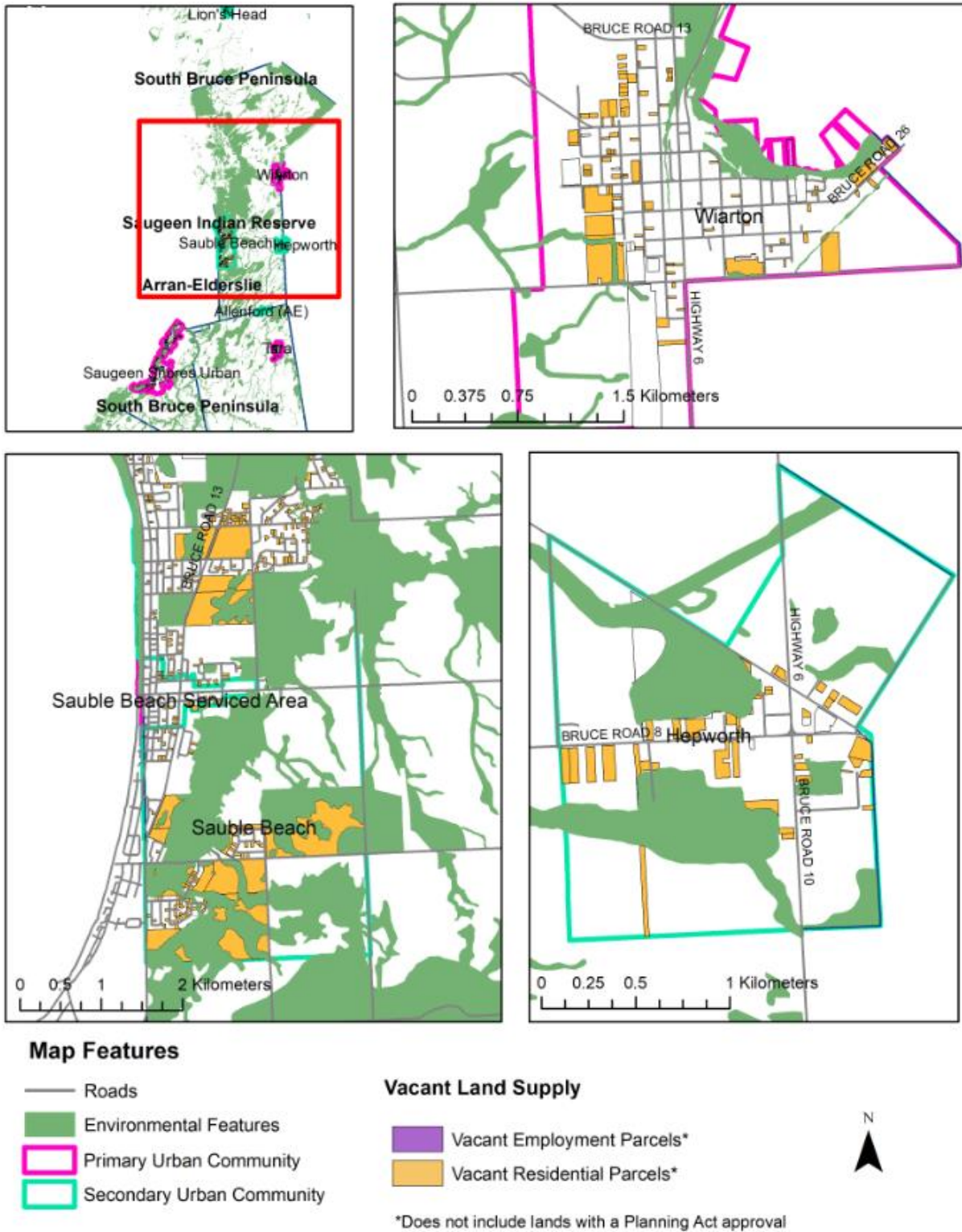


Figure A - 9: Bruce County - Vacant Residential and Employment Land Parcels (Inset 8)



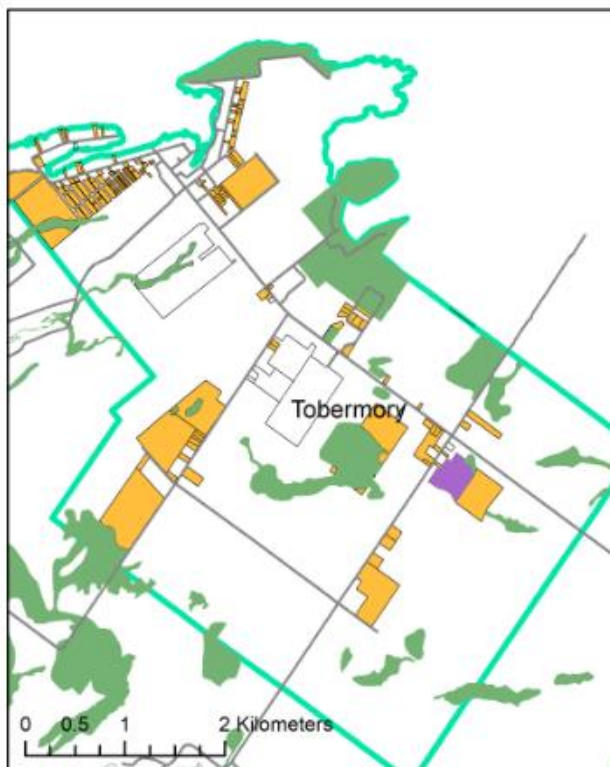
### Map Features

- Roads
- Environmental Features
- Primary Urban Community
- Secondary Urban Community

### Vacant Land Supply

- Vacant Employment Parcels\*
- Vacant Residential Parcels\*

\*Does not include lands with a Planning Act approval



## Appendix B: Local Municipal Residential and Non-Residential Forecasts, 2016 to 2046

### B.1 Municipality of Arran-Elderslie

Figure B - 1: Municipality of Arran-Elderslie Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	Mid-2016	7,000	2,380	115	215	2,710	2.58
Forecast	Mid-2021	7,200	2,470	120	220	2,810	2.56
	Mid-2026	7,400	2,530	130	220	2,880	2.57
	Mid-2031	7,500	2,570	140	220	2,930	2.56
	Mid-2036	7,700	2,640	150	220	3,010	2.56
	Mid-2041	7,800	2,680	160	220	3,060	2.55
	Mid-2046	7,900	2,710	170	220	3,100	2.55
Incremental	Mid-2016 to Mid-2021	200	90	5	5	100	
	Mid-2016 to Mid-2026	400	150	15	5	170	
	Mid-2016 to Mid-2036	700	260	35	5	300	
	Mid-2016 to Mid-2046	900	330	55	5	390	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.



Figure B - 2: Municipality of Arran-Elderslie Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	7,000	0.983	90	530	310	340	570	1,840	240	2,080
<b>2021</b>	7,200	0.475	80	580	360	360	610	1,990	250	2,240
<b>2026</b>	7,400	0.480	80	590	400	360	620	2,050	260	2,310
<b>2031</b>	7,500	0.482	80	610	410	360	640	2,100	260	2,360
<b>2036</b>	7,700	0.483	80	620	430	370	660	2,160	270	2,430
<b>2041</b>	7,800	0.487	80	630	450	370	680	2,210	270	2,480
<b>2046</b>	7,900	0.489	70	640	450	370	690	2,220	280	2,500
<b>Incremental Change</b>										
<b>2016 - 2021</b>	200	-0.5084	-10	50	50	20	40	150	10	160
<b>2016 - 2026</b>	400	0.0127	-10	60	90	20	50	210	20	230
<b>2016 - 2036</b>	700	-0.4996	-10	90	120	30	90	320	30	350
<b>2016 - 2046</b>	900	-0.4942	-20	110	140	30	120	380	40	420

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

## ***A.2 Municipality of Brockton***

Figure B - 3: Municipality of Brockton Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	<i>Mid-2016</i>	9,700	3,145	275	390	3,810	2.55
Forecast	<i>Mid-2021</i>	10,000	3,230	300	420	3,950	2.53
	<i>Mid-2026</i>	10,300	3,320	310	450	4,080	2.52
	<i>Mid-2031</i>	10,600	3,400	330	490	4,220	2.51
	<i>Mid-2036</i>	10,800	3,430	380	520	4,330	2.49
	<i>Mid-2041</i>	11,000	3,460	430	550	4,440	2.48
	<i>Mid-2046</i>	11,100	3,490	450	570	4,510	2.46
Incremental	<b>Mid-2016 to Mid-2021</b>	300	85	25	30	140	
	<b>Mid-2016 to Mid-2026</b>	600	175	35	60	270	
	<b>Mid-2016 to Mid-2036</b>	1,100	285	105	130	520	
	<b>Mid-2016 to Mid-2046</b>	1,400	345	175	180	700	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 4: Municipality of Brockton Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	9,700	0.983	140	540	990	1,110	1,050	3,830	590	4,420
<b>2021</b>	10,000	0.532	150	610	1,070	1,160	1,100	4,090	620	4,710
<b>2026</b>	10,300	0.535	150	640	1,120	1,210	1,130	4,250	650	4,900
<b>2031</b>	10,600	0.537	170	660	1,160	1,250	1,160	4,400	670	5,070
<b>2036</b>	10,800	0.538	170	670	1,190	1,280	1,190	4,500	680	5,180
<b>2041</b>	11,000	0.540	180	690	1,210	1,320	1,210	4,610	690	5,300
<b>2046</b>	11,100	0.543	190	700	1,230	1,340	1,230	4,690	700	5,390
<b>Incremental Change</b>										
<b>2016 - 2021</b>	300	-0.4514	10	70	80	50	50	260	30	290
<b>2016 - 2026</b>	600	0.0081	10	100	130	100	80	420	60	480
<b>2016 - 2036</b>	1,100	-0.4452	30	130	200	170	140	670	90	760
<b>2016 - 2046</b>	1,400	-0.4403	50	160	240	230	180	860	110	970

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

### A.3 Township of Huron-Kinloss

Figure B - 5: Township of Huron-Kinloss Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	Mid-2016	7,300	2,550	45	170	2,765	2.64
Forecast	Mid-2021	8,000	2,810	50	170	3,030	2.64
	Mid-2026	8,500	2,990	60	170	3,220	2.64
	Mid-2031	8,800	3,080	60	170	3,310	2.66
	Mid-2036	9,200	3,210	80	190	3,480	2.64
	Mid-2041	9,500	3,310	80	200	3,590	2.65
	Mid-2046	9,700	3,390	90	200	3,680	2.64
Incremental	Mid-2016 to Mid-2021	700	260	5	0	265	
	Mid-2016 to Mid-2026	1,200	440	15	0	455	
	Mid-2016 to Mid-2036	1,900	660	35	20	715	
	Mid-2016 to Mid-2046	2,400	840	45	30	915	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 6: Township of Huron-Kinloss Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	7,300	0.983	120	720	260	310	340	1,750	250	2,000
<b>2021</b>	8,000	0.461	130	860	290	340	360	1,980	300	2,280
<b>2026</b>	8,500	0.462	130	920	310	360	370	2,090	330	2,420
<b>2031</b>	8,800	0.464	140	950	320	360	380	2,150	360	2,510
<b>2036</b>	9,200	0.465	150	990	350	370	380	2,240	390	2,630
<b>2041</b>	9,500	0.467	150	1,040	360	370	390	2,310	400	2,710
<b>2046</b>	9,700	0.470	150	1,060	370	380	390	2,350	420	2,770
<b>Incremental Change</b>										
<b>2016 - 2021</b>	700	-0.5221	10	140	30	30	20	230	50	280
<b>2016 - 2026</b>	1,200	0.0067	10	200	50	50	30	340	80	420
<b>2016 - 2036</b>	1,900	-0.5174	30	270	90	60	40	490	140	630
<b>2016 - 2046</b>	2,400	-0.5130	30	340	110	70	50	600	170	770

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

## A.4 Municipality of Kincardine

Figure B - 7: Municipality of Kincardine Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	<i>Mid-2016</i>	11,700	4,080	385	345	4,810	2.43
Forecast	<i>Mid-2021</i>	12,300	4,270	430	410	5,110	2.41
	<i>Mid-2026</i>	12,800	4,400	460	470	5,330	2.40
	<i>Mid-2031</i>	13,100	4,440	500	520	5,460	2.40
	<i>Mid-2036</i>	13,500	4,530	560	560	5,650	2.39
	<i>Mid-2041</i>	13,800	4,600	600	610	5,810	2.38
	<i>Mid-2046</i>	14,000	4,650	640	640	5,930	2.36
Incremental	<b>Mid-2016 to Mid-2021</b>	600	190	45	65	300	
	<b>Mid-2016 to Mid-2026</b>	1,100	320	75	125	520	
	<b>Mid-2016 to Mid-2036</b>	1,800	450	175	215	840	
	<b>Mid-2016 to Mid-2046</b>	2,300	570	255	295	1,120	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 8: Municipality of Kincardine Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	11,700	0.983	110	580	6,470	2,100	920	10,180	1,020	11,200
<b>2021</b>	12,300	1.123	120	740	8,590	2,280	1,030	12,760	1,100	13,860
<b>2026</b>	12,800	1.153	140	770	9,310	2,360	1,080	13,660	1,150	14,810
<b>2031</b>	13,100	1.151	160	780	9,470	2,420	1,130	13,960	1,180	15,140
<b>2036</b>	13,500	1.113	160	810	9,260	2,500	1,190	13,920	1,220	15,140
<b>2041</b>	13,800	1.082	170	840	9,010	2,580	1,230	13,830	1,250	15,080
<b>2046</b>	14,000	1.067	170	860	8,890	2,630	1,270	13,820	1,290	15,110
<b>Incremental Change</b>										
<b>2016 - 2021</b>	600	0.1400	10	160	2,120	180	110	2,580	80	2,660
<b>2016 - 2026</b>	1,100	-0.0404	30	190	2,840	260	160	3,480	130	3,610
<b>2016 - 2036</b>	1,800	0.1305	50	230	2,790	400	270	3,740	200	3,940
<b>2016 - 2046</b>	2,300	0.0839	60	280	2,420	530	350	3,640	270	3,910

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.



## A.5 Municipality of Northern Bruce Peninsula

Figure B - 9: Municipality of Northern Bruce Peninsula Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	<i>Mid-2016</i>	4,100	1,835	40	30	1,905	2.15
Forecast	<i>Mid-2021</i>	4,600	2,030	40	30	2,100	2.19
	<i>Mid-2026</i>	5,000	2,160	40	30	2,230	2.24
	<i>Mid-2031</i>	5,100	2,230	40	30	2,300	2.22
	<i>Mid-2036</i>	5,400	2,330	40	30	2,400	2.25
	<i>Mid-2041</i>	5,600	2,400	40	30	2,470	2.27
	<i>Mid-2046</i>	5,700	2,460	40	30	2,530	2.25
Incremental	<b>Mid-2016 to Mid-2021</b>	500	195	0	0	195	
	<b>Mid-2016 to Mid-2026</b>	900	325	0	0	325	
	<b>Mid-2016 to Mid-2036</b>	1,300	495	0	0	495	
	<b>Mid-2016 to Mid-2046</b>	1,600	625	0	0	625	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 10: Municipality of Northern Bruce Peninsula Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	4,100	0.983	40	300	170	410	220	1,140	180	1,320
<b>2021</b>	4,600	0.466	40	370	190	480	260	1,340	230	1,570
<b>2026</b>	5,000	0.466	40	400	200	510	280	1,430	240	1,670
<b>2031</b>	5,100	0.469	40	410	210	520	290	1,470	260	1,730
<b>2036</b>	5,400	0.468	40	430	220	550	310	1,550	270	1,820
<b>2041</b>	5,600	0.469	40	450	220	570	320	1,600	280	1,880
<b>2046</b>	5,700	0.472	40	470	230	580	330	1,650	290	1,940
<b>Incremental Change</b>										
<b>2016 - 2021</b>	500	-0.517	0	70	20	70	40	200	50	250
<b>2016 - 2026</b>	900	-0.514	0	100	30	100	60	290	60	350
<b>2016 - 2036</b>	1,300	-0.515	0	130	50	140	90	410	90	500
<b>2016 - 2046</b>	1,600	-0.511	0	170	60	170	110	510	110	620

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

## A.6 Town of Saugeen Shores

Figure B - 11: Town of Saugeen Shores Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	Mid-2016	14,100	4,940	400	605	5,945	2.37
Forecast	Mid-2021	16,400	5,570	560	810	6,940	2.36
	Mid-2026	17,300	5,670	890	980	7,540	2.29
	Mid-2031	18,600	5,870	1,210	1,140	8,220	2.26
	Mid-2036	19,400	5,920	1,470	1,290	8,680	2.24
	Mid-2041	20,100	5,980	1,680	1,420	9,080	2.21
	Mid-2046	20,800	6,070	1,900	1,540	9,510	2.19
Incremental	Mid-2016 to Mid-2021	2,300	630	160	205	995	
	Mid-2016 to Mid-2026	3,200	730	490	375	1,595	
	Mid-2016 to Mid-2036	5,300	980	1,070	685	2,735	
	Mid-2016 to Mid-2046	6,700	1,130	1,500	935	3,565	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 12: Town of Saugeen Shores Employment Forecast, 2016 to 2046

Period	Population	Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	14,100	0.983	20	340	410	2,190	870	3,830	430	4,260
<b>2021</b>	16,400	0.456	20	490	520	2,660	1,050	4,740	530	5,270
<b>2026</b>	17,300	0.458	20	520	560	2,810	1,110	5,020	570	5,590
<b>2031</b>	18,600	0.459	20	580	580	3,020	1,200	5,400	630	6,030
<b>2036</b>	19,400	0.458	20	600	600	3,150	1,260	5,630	690	6,320
<b>2041</b>	20,100	0.461	20	650	630	3,260	1,310	5,870	730	6,600
<b>2046</b>	20,800	0.463	20	690	640	3,390	1,370	6,110	770	6,880
<b>Incremental Change</b>										
<b>2016 - 2021</b>	2,300	-0.5267	0	150	110	470	180	910	100	1,010
<b>2016 - 2026</b>	3,200	0.0047	0	180	150	620	240	1,190	140	1,330
<b>2016 - 2036</b>	5,300	-0.5245	0	260	190	960	390	1,800	260	2,060
<b>2016 - 2046</b>	6,700	-0.5203	0	350	230	1,200	500	2,280	340	2,620

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

### *A.7 Municipality of South Bruce*

Figure B - 13: Municipality of South Bruce Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	<i>Mid-2016</i>	5,800	1,955	75	140	2,170	2.67
Forecast	<i>Mid-2021</i>	6,000	2,030	80	140	2,250	2.67
	<i>Mid-2026</i>	6,100	2,090	80	140	2,310	2.64
	<i>Mid-2031</i>	6,300	2,150	80	140	2,370	2.66
	<i>Mid-2036</i>	6,400	2,210	90	140	2,440	2.62
	<i>Mid-2041</i>	6,600	2,260	90	140	2,490	2.65
	<i>Mid-2046</i>	6,700	2,290	90	140	2,520	2.66
Incremental	<b>Mid-2016 to Mid-2021</b>	200	75	5	0	80	
	<b>Mid-2016 to Mid-2026</b>	300	135	5	0	140	
	<b>Mid-2016 to Mid-2036</b>	600	255	15	0	270	
	<b>Mid-2016 to Mid-2046</b>	900	335	15	0	350	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 14: Municipality of South Bruce Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial/Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	5,800	0.983	180	580	340	300	140	1,540	210	1,750
<b>2021</b>	6,000	0.486	200	640	370	320	140	1,670	230	1,900
<b>2026</b>	6,100	0.486	210	670	370	330	150	1,730	300	2,030
<b>2031</b>	6,300	0.488	220	680	380	340	150	1,770	310	2,080
<b>2036</b>	6,400	0.490	230	700	400	350	150	1,830	320	2,150
<b>2041</b>	6,600	0.492	240	720	410	360	160	1,890	330	2,220
<b>2046</b>	6,700	0.493	250	730	410	360	160	1,910	340	2,250
<b>Incremental Change</b>										
<b>2016 - 2021</b>	200	-0.4967	20	60	30	20	0	130	20	150
<b>2016 - 2026</b>	300	0.0055	30	90	30	30	10	190	90	280
<b>2016 - 2036</b>	600	-0.4929	50	120	60	50	10	290	110	400
<b>2016 - 2046</b>	900	-0.4899	70	150	70	60	20	370	130	500

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

## A.8 Municipality of South Bruce Peninsula



Figure B - 15: Municipality of South Bruce Peninsula Population and Housing Forecast, 2016 to 2046

Year		Population (Including Census undercount) <sup>1</sup>	Housing Units				Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Households	
Historical	<i>Mid-2016</i>	8,600	3,325	130	245	3,700	2.32
Forecast	<i>Mid-2021</i>	9,000	3,480	160	250	3,890	2.31
	<i>Mid-2026</i>	9,300	3,580	190	250	4,020	2.31
	<i>Mid-2031</i>	9,500	3,630	220	250	4,100	2.32
	<i>Mid-2036</i>	9,800	3,710	270	250	4,230	2.32
	<i>Mid-2041</i>	10,000	3,770	310	250	4,330	2.31
	<i>Mid-2046</i>	10,100	3,810	330	250	4,390	2.30
Incremental	<b>Mid-2016 to Mid-2021</b>	400	155	30	5	190	
	<b>Mid-2016 to Mid-2026</b>	700	255	60	5	320	
	<b>Mid-2016 to Mid-2036</b>	1,200	385	140	5	530	
	<b>Mid-2016 to Mid-2046</b>	1,500	485	200	5	690	

Source: 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure B - 16: Municipality of South Bruce Peninsula Employment Forecast, 2016 to 2046

Period	Population	Total Activity Rate	Employment							
			Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. <sup>1</sup>	Total Employment (Including N.F.P.O.W.)
<b>2016</b>	8,600	0.983	220	480	210	1,050	590	2,550	300	2,850
<b>2021</b>	9,000	0.448	230	550	210	1,120	670	2,780	350	3,130
<b>2026</b>	9,300	0.449	230	570	220	1,160	690	2,870	460	3,330
<b>2031</b>	9,500	0.451	240	590	220	1,190	710	2,950	480	3,430
<b>2036</b>	9,800	0.451	250	610	230	1,230	730	3,050	490	3,540
<b>2041</b>	10,000	0.453	250	630	230	1,270	750	3,130	510	3,640
<b>2046</b>	10,100	0.456	250	650	240	1,290	770	3,200	520	3,720
<b>Incremental Change</b>										
<b>2016 - 2021</b>	5,920	-0.535	10	70	0	70	80	230	50	280
<b>2016 - 2026</b>	5,953	0.005	10	90	10	110	100	320	160	480
<b>2016 - 2036</b>	6,278	-0.532	30	130	20	180	140	500	190	690
<b>2016 - 2046</b>	6,583	-0.527	30	170	30	240	180	650	220	870

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2021.

<sup>1</sup> Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

## Appendix C: Local Municipal Population and Housing Growth Forecast by Primary and Secondary Urban Communities, 2016 to 2046

Figure C - 1: Bruce County

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Urban Areas	2016 to 2021	1,460	270	300	2,030	40	2,070	80	2,150	4,930	-500	4,430	290	4,710
	2016 to 2026	2,170	680	550	3,410	70	3,480	170	3,650	7,650	-630	7,010	620	7,630
	2016 to 2031	2,730	1,120	800	4,650	100	4,750	240	4,990	10,200	-710	9,490	860	10,350
	2016 to 2036	3,220	1,550	1,040	5,810	120	5,930	310	6,240	12,540	-820	11,720	1,120	12,850
	2016 to 2041	3,630	1,920	1,260	6,810	150	6,960	370	7,330	14,570	-990	13,580	1,340	14,910
	2016 to 2046	3,980	2,230	1,440	7,660	170	7,820	420	8,240	16,260	-1,090	15,170	1,500	16,680
Remaining Rural Areas	2016 to 2021	220	0	0	220	30	250	210	460	590	-130	450	750	1,210
	2016 to 2026	360	0	0	360	50	410	480	900	950	-170	780	1,730	2,520
	2016 to 2031	440	0	0	440	70	510	630	1,140	1,150	-190	970	2,260	3,230
	2016 to 2036	540	0	0	540	90	630	840	1,470	1,420	-220	1,200	3,020	4,220
	2016 to 2041	620	0	0	620	100	730	1,020	1,740	1,640	-260	1,380	3,640	5,020
	2016 to 2046	680	0	0	680	120	800	1,140	1,940	1,800	-290	1,510	4,080	5,590
Bruce County Total	2016 to 2021	1,680	270	300	2,250	70	2,320	290	2,610	5,520	-630	4,880	1,040	5,920
	2016 to 2026	2,530	680	550	3,770	120	3,890	660	4,550	8,600	-800	7,800	2,350	10,150
	2016 to 2031	3,160	1,120	800	5,090	170	5,250	870	6,130	11,350	-890	10,460	3,130	13,580
	2016 to 2036	3,760	1,550	1,040	6,350	210	6,560	1,160	7,710	13,960	-1,030	12,930	4,140	17,070
	2016 to 2041	4,260	1,920	1,260	7,440	250	7,690	1,390	9,080	16,210	-1,250	14,960	4,970	19,930
	2016 to 2046	4,660	2,230	1,440	8,340	290	8,630	1,560	10,180	18,060	-1,380	16,690	5,580	22,270

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 2: Municipality of Arran-Elderslie



Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal
Allenford (S.U.A.)	2016 to 2021	2	0	0	2	0	2	0	2
	2016 to 2026	4	0	0	4	0	4	0	4
	2016 to 2031	5	0	0	5	0	5	0	5
	2016 to 2036	7	0	0	7	0	7	0	7
	2016 to 2041	8	0	0	8	0	8	0	8
	2016 to 2046	9	0	0	9	0	9	0	9
Paisley (P.U.A.)	2016 to 2021	8	0	0	8	0	8	0	8
	2016 to 2026	10	0	0	10	0	10	0	10
	2016 to 2031	20	0	0	20	0	20	0	20
	2016 to 2036	20	0	0	20	0	20	0	20
	2016 to 2041	30	0	0	30	0	30	0	30
	2016 to 2046	30	0	0	30	0	30	0	30
Chesley (P.U.A.)	2016 to 2021	40	1	0	40	0	40	0	40
	2016 to 2026	70	3	0	70	0	70	1	70
	2016 to 2031	90	3	0	90	0	90	1	90
	2016 to 2036	120	5	0	120	0	120	2	120
	2016 to 2041	130	7	0	140	0	140	2	140
	2016 to 2046	140	8	0	150	0	150	3	150
Tara (P.U.A.)	2016 to 2021	20	5	0	30	0	30	0	30
	2016 to 2026	30	10	0	50	0	50	0	50
	2016 to 2031	40	20	0	60	0	60	0	60
	2016 to 2036	60	30	0	80	0	80	0	80
	2016 to 2041	70	40	0	100	0	100	0	100
	2016 to 2046	70	40	0	110	0	110	0	110
Urban Areas	2016 to 2021	70	6	0	80	0	80	0	80
	2016 to 2026	120	20	0	140	0	140	1	140
	2016 to 2031	150	20	0	180	0	180	1	180
	2016 to 2036	200	30	0	230	0	230	2	240
	2016 to 2041	230	40	0	280	0	280	2	280
	2016 to 2046	250	50	0	300	0	300	3	300
Remaining Rural Areas	2016 to 2021	20	0	0	20	7	20	1	30
	2016 to 2026	30	0	0	30	10	40	1	40
	2016 to 2031	40	0	0	40	20	50	2	60
	2016 to 2036	60	0	0	60	20	70	2	80
	2016 to 2041	70	0	0	70	20	90	3	90
	2016 to 2046	80	0	0	80	30	110	3	110
Municipality of Arran-Elderslie Total	2016 to 2021	90	6	0	90	7	100	1	100
	2016 to 2026	150	20	0	170	10	180	2	180
	2016 to 2031	190	20	0	220	20	230	3	230
	2016 to 2036	260	30	0	290	20	310	4	310
	2016 to 2041	300	40	0	350	20	370	5	370
	2016 to 2046	330	50	0	380	30	410	6	410

Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
5	0	4	0	4
10	0	9	0	9
10	0	10	0	10
20	0	20	0	20
20	0	20	0	20
20	0	20	0	20
20	-10	10	0	10
30	-10	20	0	20
50	-20	30	0	30
60	-20	40	0	40
70	-20	50	0	50
70	-20	50	0	50
110	-20	90	0	90
180	-20	160	3	160
240	-20	210	4	220
310	-30	280	7	290
360	-30	330	7	330
390	-40	350	10	360
60	-10	50	0	50
110	-10	100	0	100
150	-10	130	0	130
200	-20	180	0	180
230	-20	210	0	210
260	-20	230	0	230
200	-40	160	0	160
340	-50	290	3	290
440	-60	390	4	390
580	-70	520	7	520
680	-80	600	7	610
740	-90	650	10	660
50	-30	20	4	30
80	-30	50	4	50
100	-40	70	7	80
150	-40	100	7	110
180	-50	130	10	140
210	-50	160	10	170
240	-70	180	4	180
420	-80	340	7	340
540	-90	450	10	460
730	-110	620	10	640
860	-130	740	20	750
950	-140	810	20	830

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.



Figure C - 3: Municipality of Brockton

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Elmwood (S.U.A.)	2016 to 2021	4	0	0	4	0	4	0	4	10	0	8	0	8
	2016 to 2026	8	0	0	8	0	8	0	8	20	0	20	0	20
	2016 to 2031	10	0	0	10	0	10	0	10	30	-10	30	0	30
	2016 to 2036	20	0	0	20	0	20	0	20	40	-10	30	0	30
	2016 to 2041	20	0	0	20	0	20	0	20	50	-10	40	0	40
	2016 to 2046	20	0	0	20	0	20	0	20	50	-10	40	0	40
Walkerton (P.U.A.)	2016 to 2021	80	30	30	130	0	130	0	130	300	-80	230	0	230
	2016 to 2026	150	40	60	250	0	250	0	250	560	-100	460	0	460
	2016 to 2031	230	60	100	380	0	380	0	380	830	-110	720	0	720
	2016 to 2036	250	100	130	490	0	490	0	490	1,030	-120	900	0	900
	2016 to 2041	270	150	160	580	0	580	0	580	1,200	-150	1,050	0	1,050
	2016 to 2046	300	180	180	650	0	650	0	650	1,330	-160	1,170	0	1,170
Urban Areas	2016 to 2021	80	30	30	140	0	140	0	140	310	-80	240	0	240
	2016 to 2026	160	40	60	260	0	260	0	260	580	-100	480	0	480
	2016 to 2031	240	60	100	390	0	390	0	390	860	-110	750	0	750
	2016 to 2036	270	100	130	500	0	500	0	500	1,060	-130	940	0	940
	2016 to 2041	290	150	160	600	0	600	0	600	1,250	-160	1,090	0	1,090
	2016 to 2046	320	180	180	670	0	670	0	670	1,380	-170	1,210	0	1,210
Remaining Rural Areas	2016 to 2021	6	0	0	6	10	20	0	20	20	-10	4	0	4
	2016 to 2026	10	0	0	10	20	30	0	30	30	-20	10	0	10
	2016 to 2031	20	0	0	20	20	40	0	40	40	-20	30	0	30
	2016 to 2036	20	0	0	20	30	50	0	50	50	-20	30	0	30
	2016 to 2041	30	0	0	30	40	60	0	60	70	-20	40	0	40
	2016 to 2046	30	0	0	30	40	70	0	70	80	-30	60	0	60
Municipality of Brockton Total	2016 to 2021	90	30	30	140	10	150	0	150	330	-90	240	0	240
	2016 to 2026	170	40	60	270	20	290	0	290	610	-110	490	0	490
	2016 to 2031	250	60	100	410	20	430	0	430	900	-130	770	0	770
	2016 to 2036	290	100	130	520	30	550	0	550	1,120	-150	970	0	970
	2016 to 2041	320	150	160	620	40	660	0	660	1,310	-180	1,130	0	1,130
	2016 to 2046	350	180	180	700	40	740	0	740	1,460	-200	1,270	0	1,270

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.



Figure C - 4: Township of Huron-Kinloss

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Huron-Kinloss Shoreline (S.U.A.)	2016 to 2021	150	5	0	160	20	180	10	190	420	-40	380	50	430
	2016 to 2026	250	10	0	260	40	290	30	320	670	-50	620	110	730
	2016 to 2031	280	20	0	300	50	350	40	390	770	-50	720	140	860
	2016 to 2036	330	30	20	380	60	440	50	500	950	-60	890	190	1,080
	2016 to 2041	370	40	30	430	80	510	70	570	1,070	-80	990	230	1,230
	2016 to 2046	380	40	30	460	90	550	70	620	1,120	-80	1,040	260	1,300
Lucknow (P.U.A.)	2016 to 2021	40	0	0	40	0	40	0	40	90	-10	80	0	80
	2016 to 2026	60	0	0	60	0	60	0	60	170	-20	150	0	150
	2016 to 2031	80	0	0	80	0	80	0	80	220	-20	200	0	200
	2016 to 2036	110	0	0	110	0	110	0	110	290	-20	270	0	270
	2016 to 2041	140	0	0	140	0	140	0	140	360	-30	340	0	340
	2016 to 2046	160	0	0	160	0	160	0	160	420	-30	390	0	390
Ripley (P.U.A.)	2016 to 2021	60	0	0	60	0	60	0	60	170	-10	160	0	160
	2016 to 2026	110	0	0	110	0	110	0	110	290	-10	280	0	280
	2016 to 2031	140	0	0	140	0	140	0	140	360	-10	350	0	350
	2016 to 2036	180	0	0	180	0	180	0	180	470	-10	460	0	460
	2016 to 2041	220	0	0	220	0	220	0	220	570	-10	560	0	560
	2016 to 2046	250	0	0	250	0	250	0	250	650	-20	630	0	630
Urban Areas	2016 to 2021	250	5	0	260	20	280	10	290	680	-60	620	50	670
	2016 to 2026	420	10	0	430	40	470	30	500	1,130	-70	1,050	110	1,170
	2016 to 2031	500	20	0	520	50	570	40	610	1,350	-80	1,270	140	1,410
	2016 to 2036	630	30	20	670	60	730	50	790	1,720	-100	1,620	190	1,820
	2016 to 2041	720	40	30	790	80	860	70	930	2,000	-120	1,880	230	2,110
	2016 to 2046	790	40	30	860	90	950	70	1,030	2,190	-130	2,060	260	2,320
Remaining Rural Areas	2016 to 2021	10	0	0	10	0	10	0	10	40	-10	30	0	30
	2016 to 2026	20	0	0	20	0	20	0	20	60	-10	50	0	50
	2016 to 2031	30	0	0	30	0	30	0	30	80	-10	60	0	60
	2016 to 2036	40	0	0	40	0	40	0	40	90	-20	80	0	80
	2016 to 2041	40	0	0	40	0	40	0	40	120	-20	100	0	100
	2016 to 2046	50	0	0	50	0	50	0	50	130	-20	110	0	110
Township of Huron-Kinloss Total	2016 to 2021	260	5	0	270	20	290	10	300	720	-70	650	50	700
	2016 to 2026	440	10	0	450	40	490	30	520	1,190	-90	1,100	110	1,210
	2016 to 2031	530	20	0	550	50	600	40	640	1,430	-100	1,330	140	1,480
	2016 to 2036	660	30	20	710	60	770	50	820	1,810	-110	1,700	190	1,890
	2016 to 2041	760	40	30	830	80	910	70	970	2,110	-130	1,980	230	2,210
	2016 to 2046	840	40	30	910	90	1,000	70	1,080	2,320	-150	2,180	260	2,440

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 5: Municipality of Kincardine

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Kincardine (P.U.A.)	2016 to 2021	120	40	60	220	2	220	0	220	500	-80	420	0	420
	2016 to 2026	190	70	120	380	5	390	1	390	800	-100	700	4	700
	2016 to 2031	210	120	180	500	6	510	1	510	1,010	-110	900	4	900
	2016 to 2036	260	170	220	650	7	660	1	660	1,290	-130	1,160	4	1,160
	2016 to 2041	290	220	260	770	8	780	2	780	1,510	-150	1,360	7	1,370
	2016 to 2046	320	250	300	860	9	870	2	870	1,680	-170	1,510	7	1,520
Kincardine Urban Partial Services (S.U.A.)	2016 to 2021	40	0	0	40	9	50	2	60	120	-10	110	8	110
	2016 to 2026	70	0	0	70	20	90	3	90	190	-20	170	10	180
	2016 to 2031	80	0	0	80	20	100	5	100	200	-20	190	20	200
	2016 to 2036	90	0	0	90	30	120	7	130	250	-20	230	30	250
	2016 to 2041	100	0	0	100	30	140	8	140	270	-20	250	30	280
	2016 to 2046	110	0	0	110	40	140	9	150	290	-30	260	30	290
Tiverton (P.U.A.)	2016 to 2021	20	0	0	20	0	20	0	20	50	-10	40	0	40
	2016 to 2026	30	0	0	30	0	30	0	30	90	-10	80	0	80
	2016 to 2031	40	0	0	40	0	40	0	40	110	-10	100	0	100
	2016 to 2036	60	0	0	60	0	60	0	60	150	-10	140	0	140
	2016 to 2041	70	0	0	70	0	70	0	70	190	-20	170	0	170
	2016 to 2046	80	0	0	80	0	80	0	80	220	-20	200	0	200
Urban Areas	2016 to 2021	180	40	60	280	10	290	2	300	660	-100	560	8	570
	2016 to 2026	300	70	120	490	20	510	4	510	1,080	-120	950	20	970
	2016 to 2031	330	120	180	620	30	650	6	660	1,320	-140	1,180	20	1,200
	2016 to 2036	410	170	220	800	30	830	8	840	1,680	-160	1,520	30	1,550
	2016 to 2041	470	220	260	950	40	980	10	990	1,970	-190	1,780	40	1,820
	2016 to 2046	510	250	300	1,060	40	1,100	10	1,110	2,190	-210	1,980	40	2,020
Remaining Rural Areas	2016 to 2021	10	0	0	10	3	20	0	20	30	-10	20	0	20
	2016 to 2026	20	0	0	20	5	30	0	30	60	-10	50	0	50
	2016 to 2031	30	0	0	30	7	40	0	40	80	-10	60	0	60
	2016 to 2036	40	0	0	40	9	50	0	50	110	-20	90	0	90
	2016 to 2041	50	0	0	50	10	60	0	60	140	-20	120	0	120
	2016 to 2046	60	0	0	60	10	80	0	80	170	-20	140	0	140
Municipality of Kincardine Total	2016 to 2021	190	40	60	300	10	310	2	310	700	-110	590	8	590
	2016 to 2026	320	70	120	510	30	540	4	540	1,130	-140	1,000	20	1,010
	2016 to 2031	360	120	180	650	40	690	6	690	1,400	-150	1,240	20	1,270
	2016 to 2036	450	170	220	840	40	880	8	890	1,790	-180	1,610	30	1,640
	2016 to 2041	520	220	260	1,000	50	1,050	10	1,060	2,110	-210	1,900	40	1,930
	2016 to 2046	570	250	300	1,120	60	1,180	10	1,190	2,360	-240	2,120	40	2,160

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.



Figure C - 6: Municipality of Northern Bruce Peninsula

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal
Lion's Head (S.U.A.)	2016 to 2021	60	0	0	60	0	60	5	70
	2016 to 2026	110	0	0	110	0	110	10	120
	2016 to 2031	130	0	0	130	0	130	10	140
	2016 to 2036	160	0	0	160	0	160	20	180
	2016 to 2041	190	0	0	190	1	190	20	210
	2016 to 2046	210	0	0	210	1	210	30	230
Tobermory (S.U.A.)	2016 to 2021	20	0	0	20	0	20	10	40
	2016 to 2026	40	0	0	40	1	40	40	80
	2016 to 2031	60	0	0	60	2	60	50	100
	2016 to 2036	80	0	0	80	2	80	60	140
	2016 to 2041	100	0	0	100	2	100	70	180
	2016 to 2046	120	0	0	120	2	130	80	210
Urban Areas	2016 to 2021	90	0	0	90	0	90	20	100
	2016 to 2026	150	0	0	150	1	150	50	200
	2016 to 2031	190	0	0	190	2	190	60	250
	2016 to 2036	240	0	0	240	2	240	80	320
	2016 to 2041	290	0	0	290	3	290	90	390
	2016 to 2046	330	0	0	330	3	330	100	440
Remaining Rural Areas	2016 to 2021	110	0	0	110	2	110	180	290
	2016 to 2026	180	0	0	180	3	180	410	600
	2016 to 2031	210	0	0	210	4	210	530	740
	2016 to 2036	250	0	0	250	6	260	700	960
	2016 to 2041	280	0	0	280	7	290	840	1,130
	2016 to 2046	290	0	0	290	10	300	940	1,240
Municipality of Northern Bruce Peninsula Total	2016 to 2021	200	0	0	200	2	200	190	390
	2016 to 2026	330	0	0	330	4	330	460	790
	2016 to 2031	400	0	0	400	6	400	590	990
	2016 to 2036	490	0	0	490	8	500	780	1,280
	2016 to 2041	570	0	0	570	10	580	940	1,510
	2016 to 2046	620	0	0	620	10	640	1,040	1,680

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
170	-10	170	20	180
280	-10	280	40	320
340	-10	340	50	390
430	-10	420	70	490
500	-10	490	80	570
540	-10	530	90	620
60	-10	50	50	100
110	-10	100	120	230
150	-10	140	160	300
210	-10	200	210	410
270	-10	260	250	510
330	-10	320	280	600
230	-10	220	70	290
390	-10	380	160	540
490	-10	480	210	690
630	-20	620	280	900
760	-20	740	340	1,080
870	-20	850	370	1,220
300	-30	270	630	900
480	-40	440	1,480	1,920
550	-40	510	1,900	2,410
660	-50	610	2,520	3,130
730	-60	680	3,010	3,690
770	-60	710	3,370	4,070
530	-40	490	690	1,190
870	-50	820	1,640	2,460
1,040	-50	990	2,110	3,100
1,290	-60	1,230	2,800	4,030
1,500	-80	1,420	3,350	4,770
1,640	-80	1,550	3,740	5,290

Figure C - 7: Town of Saugeen Shores

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Saugeen Shores Urban Area	2016 to 2021	630	160	200	1,000	7	1,000	30	1,030	2,340	-130	2,210	100	2,300
	2016 to 2026	720	490	370	1,580	10	1,590	50	1,650	3,240	-160	3,080	190	3,270
	2016 to 2031	920	810	530	2,260	20	2,280	80	2,360	4,540	-180	4,360	300	4,660
	2016 to 2036	960	1,070	680	2,710	20	2,730	100	2,830	5,280	-210	5,070	370	5,440
	2016 to 2041	1,020	1,280	820	3,120	20	3,140	120	3,260	5,980	-250	5,730	440	6,170
	2016 to 2046	1,110	1,500	930	3,540	20	3,560	140	3,710	6,750	-280	6,470	510	6,980
Remaining Rural Areas	2016 to 2021	4	0	0	4	0	4	0	4	10	0	8	0	8
	2016 to 2026	9	0	0	9	0	9	0	9	20	0	20	0	20
	2016 to 2031	10	0	0	10	0	10	0	10	40	0	30	0	30
	2016 to 2036	20	0	0	20	0	20	0	20	40	0	40	0	40
	2016 to 2041	20	0	0	20	0	20	0	20	50	-10	50	0	50
	2016 to 2046	20	0	0	20	0	20	0	20	60	-10	60	0	60
Town of Saugeen Shores Total	2016 to 2021	630	160	200	1,000	7	1,010	30	1,030	2,350	-130	2,220	100	2,310
	2016 to 2026	730	490	370	1,590	10	1,600	50	1,650	3,270	-170	3,100	190	3,290
	2016 to 2031	930	810	530	2,280	20	2,290	80	2,380	4,570	-180	4,390	300	4,690
	2016 to 2036	980	1,070	680	2,720	20	2,740	100	2,850	5,320	-210	5,110	370	5,480
	2016 to 2041	1,040	1,280	820	3,140	20	3,160	120	3,280	6,030	-260	5,780	440	6,220
	2016 to 2046	1,130	1,500	930	3,560	20	3,590	140	3,730	6,810	-280	6,530	510	7,040

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 8: Municipality of South Bruce

Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Formosa (P.U.A.)	2016 to 2021	2	0	0	2	0	2	0	2	5	-10	0	0	0
	2016 to 2026	4	0	0	4	0	4	0	4	10	-10	4	0	4
	2016 to 2031	6	0	0	6	0	6	0	6	20	-10	8	0	8
	2016 to 2036	8	0	0	8	0	8	0	8	20	-10	10	0	10
	2016 to 2041	10	0	0	10	0	10	0	10	30	-10	20	0	20
	2016 to 2046	10	0	0	10	0	10	0	10	30	-10	20	0	20
Mildmay (P.U.A.)	2016 to 2021	50	2	0	60	0	60	0	60	150	-20	130	0	130
	2016 to 2026	100	5	0	110	0	110	0	110	270	-30	250	0	250
	2016 to 2031	140	8	0	150	0	150	0	150	380	-30	360	0	360
	2016 to 2036	190	10	0	200	0	200	0	200	500	-30	470	0	470
	2016 to 2041	220	10	0	240	0	240	0	240	610	-40	570	0	570
	2016 to 2046	240	20	0	260	0	260	0	260	660	-40	620	0	620
Teeswater (P.U.A.)	2016 to 2021	5	0	0	5	0	5	0	5	10	-20	0	0	0
	2016 to 2026	10	0	0	10	0	10	0	10	30	-20	10	0	10
	2016 to 2031	20	0	0	20	0	20	0	20	50	-20	20	0	20
	2016 to 2036	30	0	0	30	0	30	0	30	70	-30	40	0	40
	2016 to 2041	30	0	0	30	0	30	0	30	80	-30	50	0	50
	2016 to 2046	40	0	0	40	0	40	0	40	110	-40	70	0	70
Urban Areas	2016 to 2021	60	2	0	60	0	60	0	60	170	-40	130	0	130
	2016 to 2026	120	5	0	120	0	120	0	120	320	-50	260	0	260
	2016 to 2031	160	8	0	170	0	170	0	170	450	-60	390	0	390
	2016 to 2036	220	10	0	230	0	230	0	230	590	-70	520	0	520
	2016 to 2041	270	10	0	280	0	280	0	280	720	-80	640	0	640
	2016 to 2046	290	20	0	310	0	310	0	310	800	-90	710	0	710
Remaining Rural Areas	2016 to 2021	10	0	0	10	7	20	0	20	30	-10	20	0	20
	2016 to 2026	20	0	0	20	10	30	0	30	50	-20	40	0	40
	2016 to 2031	30	0	0	30	20	40	1	40	70	-20	50	4	60
	2016 to 2036	30	0	0	30	20	50	1	50	80	-20	70	4	70
	2016 to 2041	40	0	0	40	20	60	2	60	100	-20	80	7	80
	2016 to 2046	40	0	0	40	20	60	2	70	110	-30	80	7	90
Municipality of South Bruce Total	2016 to 2021	70	2	0	70	7	80	0	80	200	-50	140	0	140
	2016 to 2026	140	5	0	140	10	150	0	150	370	-70	300	0	300
	2016 to 2031	190	8	0	200	20	210	1	210	510	-80	440	4	440
	2016 to 2036	250	10	0	260	20	280	1	280	670	-90	590	4	590
	2016 to 2041	310	10	0	320	20	340	2	340	820	-110	720	7	730
	2016 to 2046	330	20	0	350	20	370	2	380	900	-120	790	7	790

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure C - 9: Town of South Bruce Peninsula



Development Location	Timing	Singles & Semi-Detached	Multiple Dwellings <sup>2</sup>	Apartments <sup>3</sup>	Total Residential Units	Conversions (From Seasonal to Permanent)	Total Permanent Units Including Conversions	Seasonal Units	Total Units Including Permanent, Conversions & Seasonal	Permanent Population in New Units (Excluding Undercount)	Permanent Existing Population Decline	Permanent Net Population Increase	Seasonal Population Increase	Net Population in Net Units (Including Seasonal Population)
Allenford (S.U.A.)	2016 to 2021	2	0	0	2	0	2	0	2	5	0	3	0	3
	2016 to 2026	3	0	0	3	0	3	0	3	8	0	6	0	6
	2016 to 2031	3	0	0	3	0	3	0	3	8	0	5	0	5
	2016 to 2036	4	0	0	4	0	4	0	4	10	0	8	0	8
	2016 to 2041	5	0	0	5	0	5	0	5	10	0	9	0	9
	2016 to 2046	6	0	0	6	0	6	0	6	20	0	10	0	10
Hepworth (S.U.A.)	2016 to 2021	10	0	0	10	0	10	0	10	30	0	30	0	30
	2016 to 2026	20	0	0	20	0	20	0	20	50	-10	50	0	50
	2016 to 2031	20	0	0	20	0	20	0	20	60	-10	60	0	60
	2016 to 2036	30	0	0	30	0	30	0	30	80	-10	70	0	70
	2016 to 2041	40	0	0	40	0	40	0	40	90	-10	80	0	80
	2016 to 2046	40	0	0	40	0	40	0	40	100	-10	90	0	90
Sauble Beach (S.U.A.)	2016 to 2021	50	10	0	70	1	70	10	80	170	-20	150	50	200
	2016 to 2026	90	20	0	120	2	120	30	150	280	-30	260	100	360
	2016 to 2031	120	40	0	150	3	150	40	190	360	-30	330	140	470
	2016 to 2036	150	50	0	200	4	210	50	260	480	-30	450	180	630
	2016 to 2041	170	70	0	240	5	250	60	310	570	-40	530	220	750
	2016 to 2046	190	80	0	280	6	280	70	350	640	-40	600	240	830
Sauble Beach Serviced Area (P.U.A.)	2016 to 2021	2	0	0	2	0	2	3	5	5	0	4	10	10
	2016 to 2026	3	0	0	3	0	3	6	9	8	0	6	20	30
	2016 to 2031	3	0	0	3	0	3	8	10	8	0	6	30	30
	2016 to 2036	4	0	0	4	0	4	10	10	10	0	9	40	40
	2016 to 2041	5	0	0	5	0	5	10	20	10	0	10	40	50
	2016 to 2046	6	0	0	6	0	6	10	20	20	0	10	50	60
Wiarton (P.U.A.)	2016 to 2021	40	20	0	60	0	60	1	60	130	-20	120	4	120
	2016 to 2026	70	30	0	100	0	100	3	100	230	-20	210	10	220
	2016 to 2031	90	50	0	140	0	140	4	140	310	-30	290	10	300
	2016 to 2036	110	80	0	190	0	190	6	200	420	-30	390	20	410
	2016 to 2041	130	110	0	230	0	230	7	240	510	-40	470	30	500
	2016 to 2046	140	120	0	260	0	260	8	270	570	-40	530	30	560
Urban Areas	2016 to 2021	110	30	0	140	1	140	20	160	340	-50	300	60	360
	2016 to 2026	190	60	0	240	2	240	40	280	580	-60	520	140	660
	2016 to 2031	230	90	0	320	3	320	50	370	750	-70	690	180	870
	2016 to 2036	300	140	0	430	4	430	70	500	1,000	-80	920	240	1,160
	2016 to 2041	350	180	0	520	5	530	80	610	1,200	-90	1,110	290	1,390
	2016 to 2046	390	200	0	590	6	600	90	680	1,350	-100	1,250	310	1,560
Remaining Rural Areas	2016 to 2021	40	0	0	40	1	50	30	80	120	-30	80	120	210
	2016 to 2026	70	0	0	70	2	70	70	140	180	-40	140	250	390
	2016 to 2031	80	0	0	80	3	80	100	180	200	-50	150	350	510
	2016 to 2036	90	0	0	90	4	90	140	230	230	-60	180	490	660
	2016 to 2041	100	0	0	100	5	100	170	270	260	-70	190	610	800
	2016 to 2046	100	0	0	100	7	110	190	300	270	-70	200	700	890
Town of South Bruce Peninsula Total	2016 to 2021	150	30	0	180	2	180	50	240	460	-80	380	190	570
	2016 to 2026	250	60	0	310	4	310	110	420	760	-100	660	390	1,050
	2016 to 2031	310	90	0	400	6	400	150	550	960	-110	840	530	1,380
	2016 to 2036	380	140	0	520	8	530	200	730	1,230	-130	1,100	730	1,820
	2016 to 2041	450	180	0	620	10	630	250	880	1,460	-160	1,300	890	2,190
	2016 to 2046	490	200	0	690	10	700	280	990	1,620	-170	1,440	1,010	2,450

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

<sup>1</sup> Census undercount estimated at approximately 102.7%. Note: Population including the undercount has been rounded.

<sup>2</sup> Includes townhouses and apartments in duplexes.

<sup>3</sup> Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

## Appendix D: Local Municipal Employment Growth Forecast by Primary and Secondary Urban Communities, 2016 to 2046

Figure D - 1: Bruce County

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Primary Urban Areas	2016 to 2021	0	710	1,130	810	520	3,170	340	3,510	2,460
	2016 to 2026	0	900	1,740	1,150	750	4,540	640	5,180	3,640
	2016 to 2031	0	1,040	1,910	1,480	980	5,410	790	6,200	4,370
	2016 to 2036	0	1,230	2,280	1,780	1,190	6,480	990	7,470	5,250
	2016 to 2041	0	1,440	2,520	2,050	1,370	7,380	1,120	8,500	5,940
	2016 to 2046	0	1,560	2,770	2,280	1,540	8,150	1,250	9,400	6,590
Remaining Rural Areas	2016 to 2021	70	80	120	100	0	370	50	420	290
	2016 to 2026	120	110	200	140	0	570	90	660	460
	2016 to 2031	170	170	260	170	0	770	140	910	600
	2016 to 2036	190	150	340	210	0	890	120	1,010	740
	2016 to 2041	220	170	390	240	0	1,020	130	1,150	850
	2016 to 2046	240	190	440	250	0	1,120	140	1,260	930
Bruce County Total	2016 to 2021	70	790	1,250	910	520	3,540	390	3,930	2,750
	2016 to 2026	120	1,010	1,940	1,290	750	5,110	730	5,840	4,100
	2016 to 2031	170	1,210	2,170	1,650	980	6,180	930	7,110	4,970
	2016 to 2036	190	1,380	2,620	1,990	1,190	7,370	1,110	8,480	5,990
	2016 to 2041	220	1,610	2,910	2,290	1,370	8,400	1,250	9,650	6,790
	2016 to 2046	240	1,750	3,210	2,530	1,540	9,270	1,390	10,660	7,520

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

Figure D - 2: Municipality of Arran-Elderslie

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Allenford (S.U.A.)	2016 to 2021	0	1	0	0	0	1	0	1	0
	2016 to 2026	0	2	0	0	0	2	1	3	0
	2016 to 2031	0	2	0	0	0	2	1	3	0
	2016 to 2036	0	2	0	0	0	2	1	3	0
	2016 to 2041	0	2	0	0	0	2	1	3	0
Paisley (P.U.A.)	2016 to 2046	0	3	0	0	0	3	1	4	0
	2016 to 2021	0	3	0	7	0	10	1	11	7
	2016 to 2026	0	4	0	9	0	13	1	14	9
	2016 to 2031	0	5	0	9	0	14	2	16	9
	2016 to 2036	0	6	0	10	0	16	2	18	10
Chesley (P.U.A.)	2016 to 2041	0	6	0	10	0	16	2	18	10
	2016 to 2046	0	6	0	10	0	16	2	18	10
	2016 to 2021	0	20	50	5	30	105	8	113	85
	2016 to 2026	0	30	80	6	40	156	10	166	126
	2016 to 2031	0	40	90	6	50	186	10	196	146
Tara (P.U.A.)	2016 to 2036	0	40	100	7	60	207	20	227	167
	2016 to 2041	0	50	120	8	70	248	20	268	198
	2016 to 2046	0	50	120	8	80	258	20	278	208
	2016 to 2021	0	10	0	5	20	35	5	40	25
	2016 to 2026	0	20	0	5	20	45	7	52	25
Arran-Elderslie Urban Areas	2016 to 2031	0	20	0	5	30	55	7	62	35
	2016 to 2036	0	30	0	5	40	75	9	84	45
	2016 to 2041	0	30	0	7	50	87	10	97	57
	2016 to 2046	0	30	0	7	50	87	10	97	57
	2016 to 2021	0	34	50	17	50	151	14	165	117
Remaining Rural Areas	2016 to 2026	0	56	80	20	60	216	19	235	160
	2016 to 2031	0	67	90	20	80	257	20	277	190
	2016 to 2036	0	78	100	22	100	300	32	332	222
	2016 to 2041	0	88	120	25	120	353	33	386	265
	2016 to 2046	0	89	120	25	130	364	33	397	275
Municipality of Arran-Elderslie Total	2016 to 2021	-1	5	10	1	0	16	2	18	10
	2016 to 2026	-4	8	20	2	0	26	3	30	18
	2016 to 2031	-3	10	20	2	0	29	4	33	19
	2016 to 2036	-8	20	20	3	0	35	6	41	15
	2016 to 2041	-7	20	20	4	0	37	7	44	17
	2016 to 2046	-14	20	30	5	0	41	8	49	21
	2016 to 2021	-1	39	60	18	50	166	16	182	127
	2016 to 2026	-4	64	100	22	60	242	22	264	178
	2016 to 2031	-3	77	110	22	80	286	24	310	209
	2016 to 2036	-8	98	120	25	100	335	38	373	237
	2016 to 2041	-7	108	140	29	120	390	40	430	282
	2016 to 2046	-14	109	150	30	130	405	41	446	296

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



Figure D - 3: Municipality of Brockton

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Elmwood (S.U.A.)	2016 to 2021	0	2	0	2	0	4	1	5	2
	2016 to 2026	0	3	0	4	0	7	2	9	4
	2016 to 2031	0	4	0	6	0	10	3	13	6
	2016 to 2036	0	5	0	7	0	12	3	15	7
	2016 to 2041	0	5	0	8	0	13	4	17	8
	2016 to 2046	0	6	0	9	0	15	4	19	9
Walkerton (P.U.A.)	2016 to 2021	0	70	70	50	50	240	30	270	170
	2016 to 2026	0	100	120	100	80	400	60	460	300
	2016 to 2031	0	110	150	130	110	500	70	570	390
	2016 to 2036	0	120	170	160	140	590	90	680	470
	2016 to 2041	0	150	200	190	160	700	100	800	550
	2016 to 2046	0	150	210	210	180	750	110	860	600
Brockton Urban Areas	2016 to 2021	0	72	70	52	50	244	31	275	172
	2016 to 2026	0	103	120	104	80	407	62	469	304
	2016 to 2031	0	114	150	136	110	510	73	583	396
	2016 to 2036	0	125	170	167	140	602	93	695	477
	2016 to 2041	0	155	200	198	160	713	104	817	558
	2016 to 2046	0	156	210	219	180	765	114	879	609
Remaining Rural Areas	2016 to 2021	10	1	10	3	0	24	1	24	23
	2016 to 2026	10	2	20	5	0	37	1	39	35
	2016 to 2031	30	4	20	7	0	61	3	63	57
	2016 to 2036	30	5	30	9	0	73	3	77	69
	2016 to 2041	40	6	30	10	0	86	4	90	80
	2016 to 2046	50	7	30	10	0	97	5	102	90
Municipality of Brockton Total	2016 to 2021	10	73	80	55	50	268	32	299	195
	2016 to 2026	10	105	140	109	80	444	63	508	339
	2016 to 2031	30	118	170	143	110	571	76	646	453
	2016 to 2036	30	130	200	176	140	675	96	772	546
	2016 to 2041	40	161	230	208	160	799	108	907	638
	2016 to 2046	50	163	240	229	180	862	119	981	699

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

Figure D - 4: Township of Huron-Kinloss

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Huron-Kinloss Shoreline (S.U.A.)	2016 to 2021	0	80	0	10	10	100	20	120	20
	2016 to 2026	0	110	0	20	20	150	40	190	40
	2016 to 2031	0	120	0	20	20	160	60	220	40
	2016 to 2036	0	140	0	20	30	190	70	260	50
	2016 to 2041	0	160	0	30	30	220	70	290	60
	2016 to 2046	0	160	0	30	30	220	80	300	60
Lucknow (P.U.A.)	2016 to 2021	0	20	0	3	1	24	5	29	4
	2016 to 2026	0	30	0	6	3	39	10	49	9
	2016 to 2031	0	30	0	7	4	41	20	61	11
	2016 to 2036	0	40	0	8	5	53	20	73	13
	2016 to 2041	0	50	0	10	6	66	30	96	16
	2016 to 2046	0	60	0	10	7	77	30	107	17
Ripley (P.U.A.)	2016 to 2021	0	30	10	6	7	53	10	63	23
	2016 to 2026	0	50	30	10	10	100	20	120	50
	2016 to 2031	0	60	30	10	10	110	30	140	50
	2016 to 2036	0	70	40	20	20	150	40	190	80
	2016 to 2041	0	90	50	20	20	180	40	220	90
	2016 to 2046	0	100	50	20	20	190	50	240	90
Huron-Kinloss Urban Areas	2016 to 2021	0	130	10	19	18	177	35	212	47
	2016 to 2026	0	190	30	36	33	289	70	359	99
	2016 to 2031	0	210	30	37	34	311	110	421	101
	2016 to 2036	0	250	40	48	55	393	130	523	143
	2016 to 2041	0	300	50	60	56	466	140	606	166
	2016 to 2046	0	320	50	60	57	487	160	647	167
Remaining Rural Areas	2016 to 2021	10	6	10	4	0	30	2	31	24
	2016 to 2026	20	8	30	7	0	65	3	68	57
	2016 to 2031	20	10	30	8	0	68	5	73	58
	2016 to 2036	30	10	40	9	0	89	6	95	79
	2016 to 2041	40	20	50	10	0	120	7	127	100
	2016 to 2046	40	20	60	10	0	130	9	139	110
Township of Huron-Kinloss Total	2016 to 2021	10	136	20	23	18	207	37	243	71
	2016 to 2026	20	198	60	43	33	354	73	427	156
	2016 to 2031	20	220	60	45	34	379	115	494	159
	2016 to 2036	30	260	80	57	55	482	136	618	222
	2016 to 2041	40	320	100	70	56	586	147	733	266
	2016 to 2046	40	340	110	70	57	617	169	786	277

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

Figure D - 5: Municipality of Kincardine



Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Kincardine (P.U.A.)	2016 to 2021	0	110	140	150	100	500	60	560	390
	2016 to 2026	0	130	230	220	150	730	90	820	600
	2016 to 2031	0	150	240	270	190	850	120	970	700
	2016 to 2036	0	160	290	340	240	1,030	140	1,170	870
	2016 to 2041	0	190	320	400	280	1,190	170	1,360	1,000
Kincardine Urban Partial Services (S.U.A.)	2016 to 2046	0	200	350	450	320	1,320	190	1,510	1,120
	2016 to 2021	0	30	730	0	0	760	20	780	730
	2016 to 2026	0	30	1,130	0	0	1,160	20	1,180	1,130
	2016 to 2031	0	30	1,210	0	0	1,240	20	1,260	1,210
	2016 to 2036	0	30	1,440	0	0	1,470	30	1,500	1,440
Tiverton (P.U.A.)	2016 to 2041	0	30	1,590	0	0	1,620	30	1,650	1,590
	2016 to 2046	0	30	1,760	0	0	1,790	30	1,820	1,760
	2016 to 2021	0	10	0	20	10	40	6	46	30
	2016 to 2026	0	10	0	30	20	60	9	69	50
	2016 to 2031	0	20	0	40	20	80	10	90	60
Kincardine Urban Areas	2016 to 2036	0	20	0	50	30	100	20	120	80
	2016 to 2041	0	20	0	50	30	100	20	120	80
	2016 to 2046	0	30	0	60	40	130	30	160	100
	2016 to 2021	0	150	870	170	110	1,300	86	1,386	1,150
	2016 to 2026	0	170	1,360	250	170	1,950	119	2,069	1,780
On-Site Bruce Power Jobs	2016 to 2031	0	200	1,450	310	210	2,170	150	2,320	1,970
	2016 to 2036	0	210	1,730	390	270	2,600	190	2,790	2,390
	2016 to 2041	0	240	1,910	450	310	2,910	220	3,130	2,670
	2016 to 2046	0	260	2,110	510	360	3,240	250	3,490	2,980
	2016 to 2021	0	0	1,200	0	0	1,200	0	1,200	1,200
Remaining Rural Areas	2016 to 2026	0	0	1,400	0	0	1,400	0	1,400	1,400
	2016 to 2031	0	0	1,430	0	0	1,430	0	1,430	1,430
	2016 to 2036	0	0	900	0	0	900	0	900	900
	2016 to 2041	0	0	450	0	0	450	0	450	450
	2016 to 2046	0	0	100	0	0	100	0	100	100
Municipality of Kincardine Total	2016 to 2021	20	6	40	9	0	75	3	78	69
	2016 to 2026	40	8	80	10	0	138	6	144	130
	2016 to 2031	50	10	120	20	0	200	8	208	190
	2016 to 2036	60	10	160	20	0	250	10	260	240
	2016 to 2041	60	20	180	20	0	280	10	290	260
	2016 to 2046	60	20	210	30	0	320	20	340	300
	2016 to 2021	20	156	2,110	179	110	2,575	89	2,664	2,419
	2016 to 2026	40	178	2,840	260	170	3,488	125	3,613	3,310
	2016 to 2031	50	210	3,000	330	210	3,800	158	3,958	3,590
	2016 to 2036	60	220	2,790	410	270	3,750	200	3,950	3,530
	2016 to 2041	60	260	2,540	470	310	3,640	230	3,870	3,380
	2016 to 2046	60	280	2,420	540	360	3,660	270	3,930	3,380

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

Figure D - 6: Municipality of Northern Bruce Peninsula

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Lion's Head (S.U.A.)	2016 to 2021	0	30	0	9	30	69	20	89	39
	2016 to 2026	0	30	0	10	50	90	20	110	60
	2016 to 2031	0	40	0	20	60	120	30	150	80
	2016 to 2036	0	50	0	20	70	140	30	170	90
	2016 to 2041	0	50	0	20	80	150	40	190	100
	2016 to 2046	0	60	0	20	90	170	40	210	110
Tobermory (S.U.A.)	2016 to 2021	0	8	5	30	7	50	5	55	42
	2016 to 2026	0	10	7	40	10	67	8	75	57
	2016 to 2031	0	20	8	50	10	88	10	98	68
	2016 to 2036	0	20	10	60	20	110	20	130	90
	2016 to 2041	0	30	10	70	20	130	20	150	100
	2016 to 2046	0	30	10	80	20	140	20	160	110
Northern Bruce Peninsula Urban Areas	2016 to 2021	0	38	5	39	37	119	25	144	81
	2016 to 2026	0	40	7	50	60	157	28	185	117
	2016 to 2031	0	60	8	70	70	208	40	248	148
	2016 to 2036	0	70	10	80	90	250	50	300	180
	2016 to 2041	0	80	10	90	100	280	60	340	200
	2016 to 2046	0	90	10	100	110	310	60	370	220
Remaining Rural Areas	2016 to 2021	0	40	10	30	0	80	30	110	40
	2016 to 2026	0	50	20	40	0	110	40	150	60
	2016 to 2031	0	60	30	50	0	140	40	180	80
	2016 to 2036	0	70	30	60	0	160	50	210	90
	2016 to 2041	0	80	40	60	0	180	50	230	100
	2016 to 2046	0	80	40	70	0	190	50	240	110
Municipality of Northern Bruce Peninsula Total	2016 to 2021	0	78	15	69	37	199	55	254	121
	2016 to 2026	0	90	27	90	60	267	68	335	177
	2016 to 2031	0	120	38	120	70	348	80	428	228
	2016 to 2036	0	140	40	140	90	410	100	510	270
	2016 to 2041	0	160	50	150	100	460	110	570	300
	2016 to 2046	0	170	50	170	110	500	110	610	330

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

Figure D - 7: Town of Saugeen Shores

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Saugeen Shores Urban Area	2016 to 2021	0	160	100	450	180	890	100	990	730
	2016 to 2026	0	180	130	590	250	1,150	140	1,290	970
	2016 to 2031	0	240	150	800	340	1,530	200	1,730	1,290
	2016 to 2036	0	260	170	920	390	1,740	250	1,990	1,480
	2016 to 2041	0	310	190	1,030	440	1,970	290	2,260	1,660
	2016 to 2046	0	350	210	1,150	510	2,220	330	2,550	1,870
Remaining Rural Areas	2016 to 2021	0	1	10	20	0	31	0	31	30
	2016 to 2026	0	1	20	20	0	41	1	42	40
	2016 to 2031	0	2	20	30	0	52	1	53	50
	2016 to 2036	0	2	20	40	0	62	2	64	60
	2016 to 2041	0	3	20	40	0	63	2	65	60
	2016 to 2046	0	3	30	50	0	83	3	86	80
Town of Saugeen Shores Total	2016 to 2021	0	161	110	470	180	921	100	1,021	760
	2016 to 2026	0	181	150	610	250	1,191	141	1,332	1,010
	2016 to 2031	0	242	170	830	340	1,582	201	1,783	1,340
	2016 to 2036	0	262	190	960	390	1,802	252	2,054	1,540
	2016 to 2041	0	313	210	1,070	440	2,033	292	2,325	1,720
	2016 to 2046	0	353	240	1,200	510	2,303	333	2,636	1,950

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

Figure D - 8: Municipality of South Bruce

Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Formosa (P.U.A.)	2016 to 2021	0	1	5	3	1	10	0	10	9
	2016 to 2026	0	1	6	5	2	14	1	15	13
	2016 to 2031	0	1	7	6	3	17	1	18	16
	2016 to 2036	0	2	10	8	3	23	2	25	21
	2016 to 2041	0	4	10	9	4	27	3	30	23
	2016 to 2046	0	4	10	10	4	28	3	31	24
Mildmay (P.U.A.)	2016 to 2021	0	60	10	8	3	81	10	91	21
	2016 to 2026	0	80	20	10	5	115	70	185	35
	2016 to 2031	0	50	20	20	7	97	50	147	47
	2016 to 2036	0	100	30	20	9	159	90	249	59
	2016 to 2041	0	120	30	20	10	180	90	270	60
	2016 to 2046	0	120	40	30	10	200	100	300	80
Teeswater (P.U.A.)	2016 to 2021	0	2	0	6	2	10	0	11	8
	2016 to 2026	0	3	0	8	3	14	3	16	11
	2016 to 2031	0	4	0	10	4	18	3	21	14
	2016 to 2036	0	9	0	10	6	25	8	33	16
	2016 to 2041	0	10	0	20	7	37	8	45	27
	2016 to 2046	0	10	0	20	8	38	10	48	28
South Bruce Urban Areas	2016 to 2021	0	63	15	17	6	101	10	112	38
	2016 to 2026	0	84	26	23	10	143	74	216	59
	2016 to 2031	0	55	27	36	14	132	54	186	77
	2016 to 2036	0	111	40	38	18	207	100	307	96
	2016 to 2041	0	134	40	49	21	244	101	345	110
	2016 to 2046	0	134	50	60	22	266	113	379	132
Remaining Rural Areas	2016 to 2021	20	8	7	3	0	39	2	40	31
	2016 to 2026	40	10	10	5	0	64	10	74	54
	2016 to 2031	50	50	10	6	0	116	50	166	66
	2016 to 2036	60	10	20	8	0	98	10	108	88
	2016 to 2041	60	20	20	9	0	109	10	119	89
	2016 to 2046	70	20	20	10	0	120	10	130	100
Municipality of South Bruce Total	2016 to 2021	20	71	23	21	6	140	12	152	69
	2016 to 2026	40	94	36	28	10	207	84	291	113
	2016 to 2031	50	105	37	42	14	248	104	352	143
	2016 to 2036	60	121	60	46	18	305	110	415	184
	2016 to 2041	60	154	60	58	21	353	111	464	199
	2016 to 2046	70	154	70	70	22	386	123	509	232

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



Figure D - 9: Town of South Bruce Peninsula



Development Location	Timing	Primary	Work at Home	Industrial	Commercial / Population Related	Institutional	Total	N.F.P.O.W	Total Employment (Including NFPOW)	Total (Excluding Work at Home)
Allenford (S.U.A.)	2016 to 2021	0	0	0	0	0	0	0	0	0
	2016 to 2026	0	0	0	0	0	0	0	0	0
	2016 to 2031	0	0	0	0	0	0	0	0	0
	2016 to 2036	0	0	0	0	0	0	0	0	0
	2016 to 2041	0	0	0	0	0	0	0	0	0
	2016 to 2046	0	0	0	0	0	0	0	0	0
Hepworth (S.U.A.)	2016 to 2021	0	5	0	2	3	10	3	13	5
	2016 to 2026	0	6	0	4	4	14	10	24	8
	2016 to 2031	0	8	0	5	5	18	10	28	10
	2016 to 2036	0	9	0	6	6	21	10	31	12
	2016 to 2041	0	10	0	7	6	23	10	33	13
	2016 to 2046	0	10	0	8	7	25	10	35	15
Sauble Beach (S.U.A.)	2016 to 2021	0	30	0	10	20	60	20	80	30
	2016 to 2026	0	40	0	20	30	90	60	150	50
	2016 to 2031	0	50	0	30	30	110	70	180	60
	2016 to 2036	0	50	0	40	40	130	80	210	80
	2016 to 2041	0	70	0	50	40	160	90	250	90
	2016 to 2046	0	70	0	50	50	170	90	260	100
Sauble Beach Serviced Area (P.U.A.)	2016 to 2021	0	0	0	2	2	4	0	4	4
	2016 to 2026	0	0	0	3	3	6	0	6	6
	2016 to 2031	0	0	0	4	4	8	0	8	8
	2016 to 2036	0	0	0	5	4	9	0	9	9
	2016 to 2041	0	0	0	6	5	11	0	11	11
	2016 to 2046	0	0	0	7	5	12	0	12	12
Warton (P.U.A.)	2016 to 2021	0	30	2	30	50	112	20	132	82
	2016 to 2026	0	30	4	40	70	144	50	194	114
	2016 to 2031	0	40	6	50	80	176	60	236	136
	2016 to 2036	0	50	8	70	100	228	70	298	178
	2016 to 2041	0	60	9	90	110	269	80	349	209
	2016 to 2046	0	70	10	100	120	300	80	380	230
South Bruce Peninsula Urban Areas	2016 to 2021	0	65	2	44	75	186	43	229	121
	2016 to 2026	0	76	4	67	107	254	120	374	178
	2016 to 2031	0	98	6	89	119	312	140	452	214
	2016 to 2036	0	109	8	121	150	388	160	548	279
	2016 to 2041	0	140	9	153	161	463	180	643	323
	2016 to 2046	0	150	10	165	182	507	180	687	357
Remaining Rural Areas	2016 to 2021	6	20	4	30	0	60	10	70	40
	2016 to 2026	10	20	9	40	0	79	30	109	59
	2016 to 2031	20	20	10	50	0	100	30	130	80
	2016 to 2036	30	20	20	70	0	140	30	170	120
	2016 to 2041	30	20	20	70	0	140	30	170	120
	2016 to 2046	30	20	20	80	0	150	30	180	130
Town of South Bruce Peninsula Total	2016 to 2021	6	85	6	74	75	246	53	299	161
	2016 to 2026	10	96	13	107	107	333	150	483	237
	2016 to 2031	20	118	16	139	119	412	170	582	294
	2016 to 2036	30	129	28	191	150	528	190	718	399
	2016 to 2041	30	160	29	223	161	603	210	813	443
	2016 to 2046	30	170	30	245	182	657	210	867	487

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

## Appendix E: Local Municipal Residential Land Needs by Primary and Secondary Urban Community, 2021 to 2046

Figure E - 1: Bruce County

Local Municipality	Primary and Secondary Urban Communities	Unit Capacity of Vacant Residential Lands <sup>1</sup>	Intensification Supply (10%)	Total Housing Unit Supply on Vacant Lands	Units in Active Development Plans	Active Development Plans + Vacant Residential Land Supply	Unit Forecast, 2021 to 2046	Unit Surplus/Deficit
		A	B	C = A + B	D	E = C + D	F	G = E - F
Municipality of Arran-Elderslie	Chesley	270	30	300	80	380	110	270
	Paisley	390	40	430	-	430	20	410
	Tara	210	20	230	60	290	90	200
	Total	890	90	980	140	1,120	220	900
Municipality of Brockton	Walkerton	350	40	390	330	720	520	200
	Total	380	40	420	330	750	520	230
Township of Huron-Kinloss	Huron-Kinloss Shoreline	740	70	810	90	900	300	600
	Lucknow	450	50	500	-	500	120	380
	Ripley	210	20	230	110	340	180	160
	Total	1,450	150	1,600	200	1,800	610	1,190
Municipality of Kincardine	Kincardine	1,840	180	2,020	590	2,610	640	1,970
	Kincardine Urban partial service	440	40	480	-	480	70	410
	Tiverton	320	30	350	-	350	70	280
	Total	2,660	270	2,930	590	3,520	770	2,750
Municipality of Northern Bruce Peninsula	Lion's Head	150	20	170	60	230	140	90
	Tobermory	1,830	180	2,010	10	2,020	100	1,920
	Total	2,000	200	2,200	80	2,280	250	2,030
Town of Saugeen Shores	Saugeen Shores Urban	2,270	230	2,500	1,960	4,460	2,540	1,920
	Total	2,470	250	2,720	1,960	4,680	2,540	2,140
Municipality of South Bruce	Formosa	220	20	240	-	240	10	230
	Mildmay	250	30	280	160	440	200	240
	Teeswater	290	30	320	-	320	40	280
	Total	770	80	850	160	1,010	250	760
Town of South Bruce Peninsula	Allenford (SBP)	10	-	10	-	10	-	10
	Hepworth	130	10	140	-	140	30	110
	Sauble Beach	1,940	190	2,130	60	2,190	210	1,980
	Sauble Beach Serviced Area	30	-	30	-	30	-	30
	Warton	430	40	470	90	560	210	350
	Total	2,570	260	2,830	150	2,980	450	2,530
Grand Total		13,170	1,320	14,490	3,610	18,100	5,600	12,500

Source: Watson & Associates Economists Ltd., 2021.

Note: Numbers may not add correctly due to rounding.

<sup>1</sup> Supply from 2020 adjusted to 2021, based on short-term demand forecast.

## Appendix F: Local Municipal Non-Residential Land Needs by Primary and Secondary Urban Community, 2021 to 2046

Figure F - 1: Municipality of Arran-Elderslie

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Allenford (S.U.A.)	0	0	0	2021 to 2046	0	0	0
Paisley (P.U.A.)	0	0	0		0	0	0
Chesley (P.U.A.)	9	54	63		83	6	3
Tara (P.U.A.)	0	19	19		0	0	0
<b>Arran-Elderslie Urban Areas</b>	<b>10</b>	<b>73</b>	<b>82</b>		<b>83</b>	<b>6</b>	<b>3</b>

Source: Watson & Associates Economists Ltd., 2021.

Figure F - 2: Municipality of Brockton

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Elmwood (S.U.A.)	0	0	0	2021 to 2046	0	0	0
Walkerton (P.U.A.)	21	114	135		183	14	7
<b>Brockton Urban Areas</b>	<b>21</b>	<b>114</b>	<b>135</b>		<b>183</b>	<b>14</b>	<b>7</b>

Source: Watson & Associates Economists Ltd., 2021.

Figure F - 3: Township of Huron-Kinloss

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Huron-Kinloss Shoreline (S.U.A.)	0	0	0	2021 to 2046	0	0	0
Lucknow (P.U.A.)	0	43	43		0	0	0
Ripley (P.U.A.)	4	31	35		53	4	0
<b>Huron-Kinloss Urban Areas</b>	<b>4</b>	<b>75</b>	<b>79</b>		<b>53</b>	<b>4</b>	<b>0</b>

Source: Watson & Associates Economists Ltd., 2021.

Figure F - 4: Municipality of Kincardine

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Kincardine (P.U.A.)	32	94	126	2021 to 2046	301	23	9
Kincardine Urban Partial Services (S.U.A.)	165	161	326		1,032	79	85
Tiverton (P.U.A.)	0	0	0		0	0	0
<b>Kincardine Urban Areas</b>	<b>197</b>	<b>255</b>	<b>452</b>		<b>1,333</b>	<b>103</b>	<b>94</b>

Source: Watson & Associates Economists Ltd., 2021.

Figure F - 5: Municipality of Northern Bruce Peninsula

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Lion's Head (S.U.A.)	0	0	0	2021 to 2046	0	0	0
Tobermory (S.U.A.)	8	0	8		21	2	7
<b>Northern Bruce Peninsula Urban Areas</b>	<b>8</b>	<b>0</b>	<b>8</b>		<b>21</b>	<b>2</b>	<b>7</b>

Source: Watson & Associates Economists Ltd., 2021.

Figure F - 6: Town of Saugeen Shores

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Saugeen Shores Urban Area	7	83	90	2021 to 2046	297	23	-16

Source: Watson & Associates Economists Ltd., 2021.

Figure F - 7: Municipality of South Bruce

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Formosa (P.U.A.)	1	5	7	2021 to 2046	11	1	1
Mildmay (P.U.A.)	4	17	21		31	2	2
Teeswater (P.U.A.)	0	13	13		0	0	0
South Bruce Urban Areas	6	35	41		42	3	3

Source: Watson & Associates Economists Ltd., 2021.

Figure F - 8: Town of South Bruce Peninsula

Development Location	Employment Land Supply (ha)			Timing	Employment on Employment Lands	Land Demand ha (13 Jobs per net ha)	Deficit/Surplus
	Net Vacant	Occupied	Total				
Hepworth (S.U.A.)	0	0	0	2021 to 2046	0	0	0
Sauble Beach (S.U.A.)	0	0	0		0	0	0
Sauble Beach Serviced Area (P.U.A.)	0	0	0		0	0	0
Warton (P.U.A.)	7	83	89		43	3	3
South Bruce Peninsula Urban Areas	7	83	89		43	3	3

Source: Watson & Associates Economists Ltd., 2021.

