

Plan the Bruce: Good Growth

Presentation to Council

September 2021



Purpose

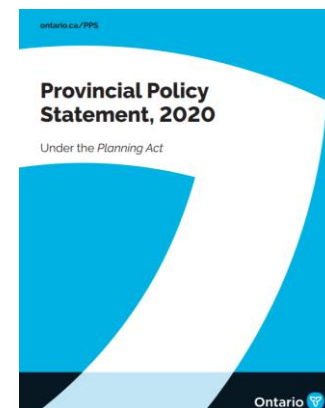
- Bruce County retained Watson & Associates Economists Ltd. (Watson) and WSP in the winter of 2020 to undertake the Plan the Bruce: Good Growth project. The project included preparing an overview of the County's projected growth over the next 25 years and a growth management strategy to inform the new Bruce County Official Plan.
- The Plan the Bruce: Good Growth Interim Report was released in March 2021 and was followed by consultation with key industry stakeholders and local municipal staff was conducted to receive feedback and input on the Interim Report.
- In response to feedback received, and further review of available data sources, the Bruce County growth forecast to 2046 has been increased.

Engagement with Area Municipalities and Local Stakeholders

- The Good Growth project has been broadly informed through engagement and consultation with County Council, local municipalities, key stakeholders and members of the community.
- Through this consultation, a common theme emerged that the housing growth outlook for Bruce County was too low and should be revised.
- Upon further review, the Consultant Team identified that there is stronger near-term and longer-term growth outlook across the County's area municipalities than previously reported.

Purpose of Presentation

- The purpose of this presentation is to provide Council with the findings of our updated technical analysis as it relates to the County-wide residential and non-residential land needs analysis.
- In response to the engagement sessions, the Recommended Directions have been refined for Council's consideration.



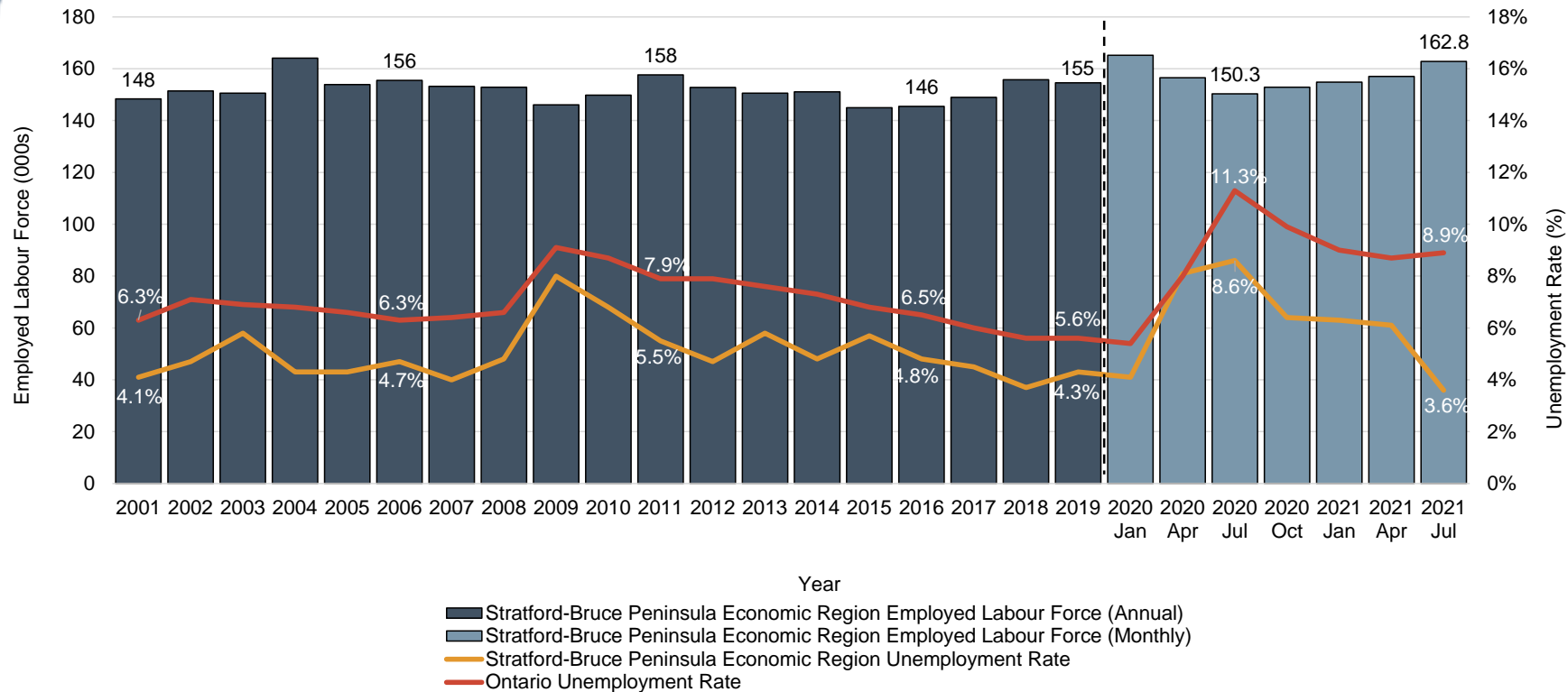
Revised Population, Housing and Employment Forecast





BRUCE
county

Perth, Huron, Bruce, and Grey County Combined Labour Force Trends, 2001 to July 2021



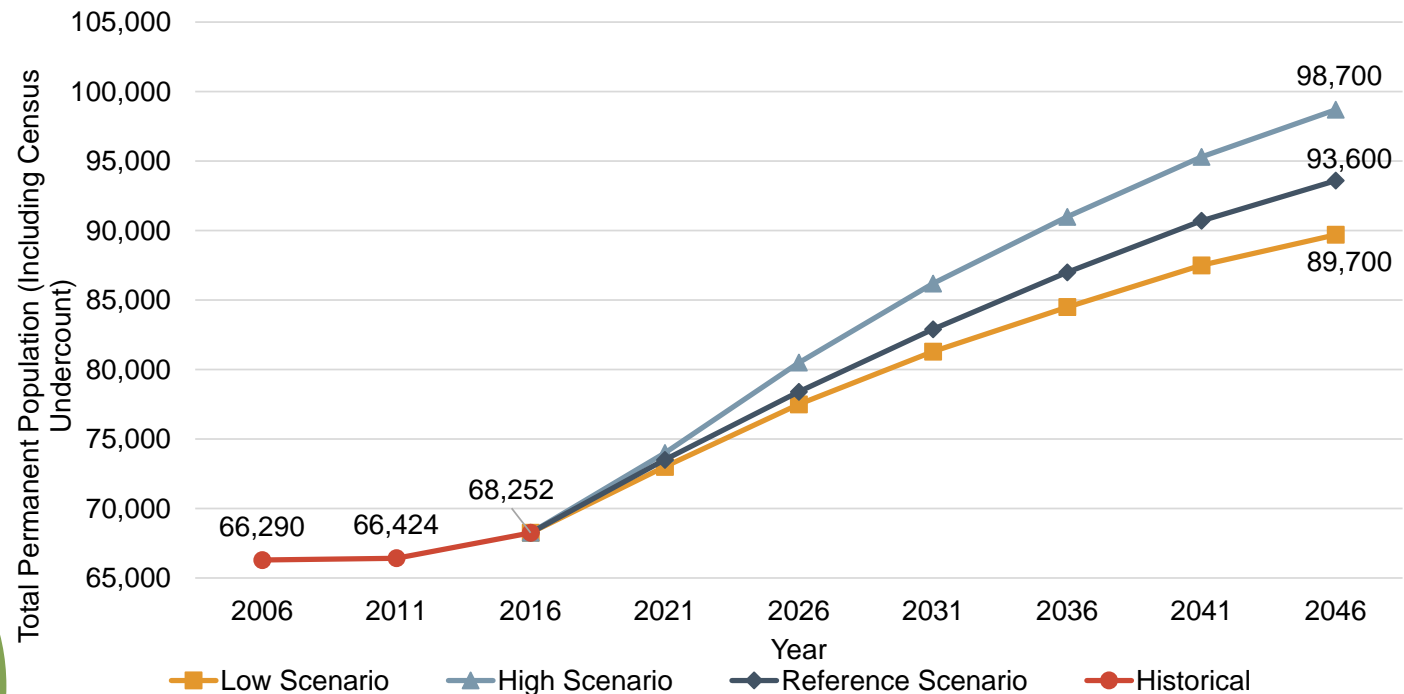
Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.

Source: Statistics Canada Data Tables 14-10-0092-01, 14-10-0091-01, and 14-10-0293-02. By Watson & Associates Economists Ltd., 2020.



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Revised Bruce County Population Growth Scenarios, 2016 to 2046

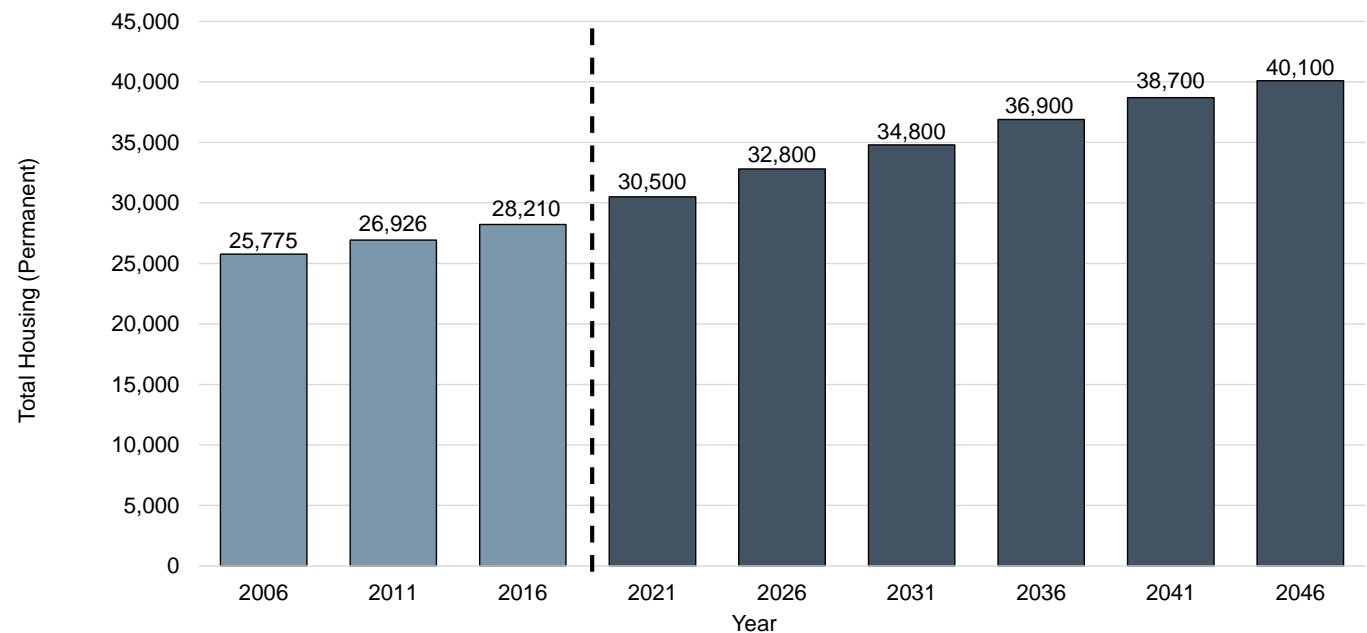


Source: Forecast by Watson & Associates Economists Ltd., 2021.

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

2046
Reference
Scenario
Population
Increased
by **7,400**

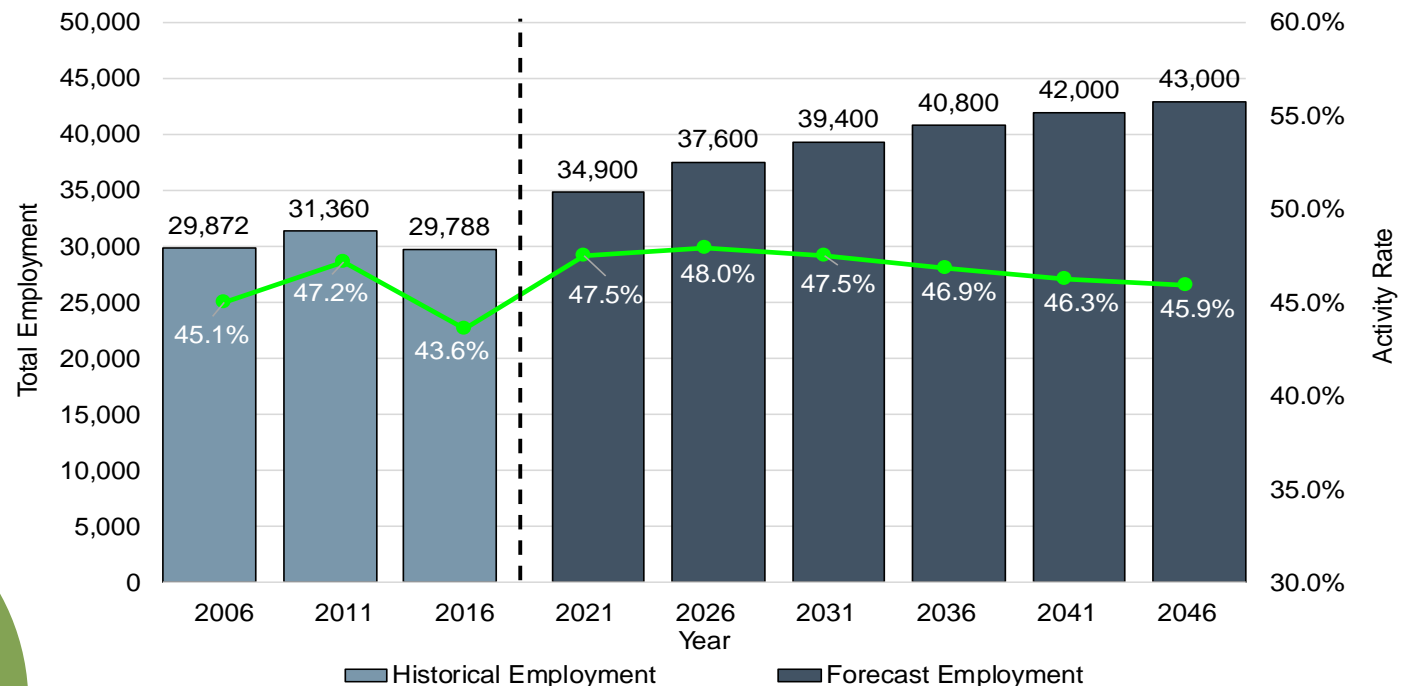
Revised Bruce County Housing Growth Forecast, 2016 to 2046



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

2046
Reference
Scenario
Housing
Increased
by **3,300**

Revised Bruce County Employment Growth Forecast, 2016 to 2046



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

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

Employment forecast derived by Watson & Associates Economists Ltd., 2021.

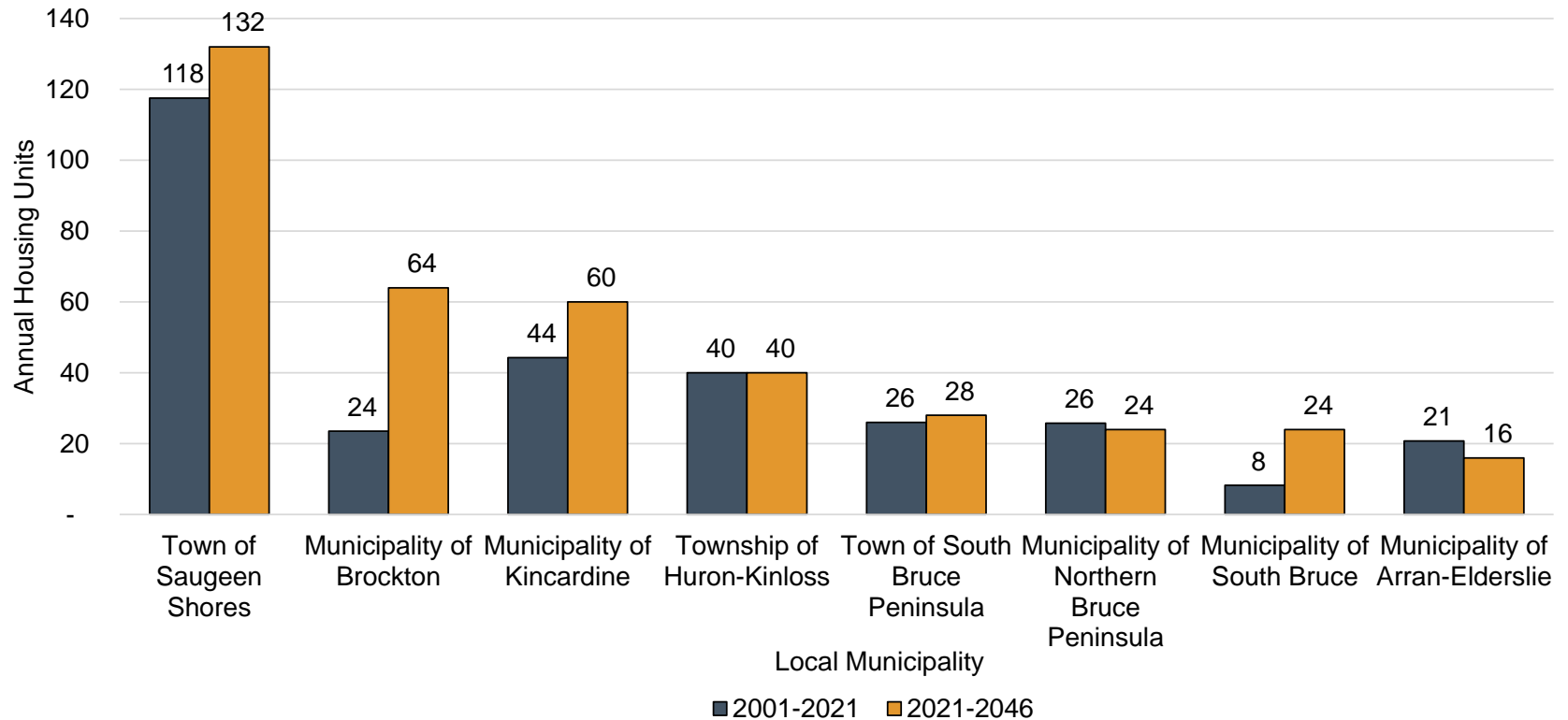
Note: Numbers have been rounded

**2046
Reference
Scenario
Employment
Increased by
2,500**

Allocation of Population, Housing and Employment Forecast

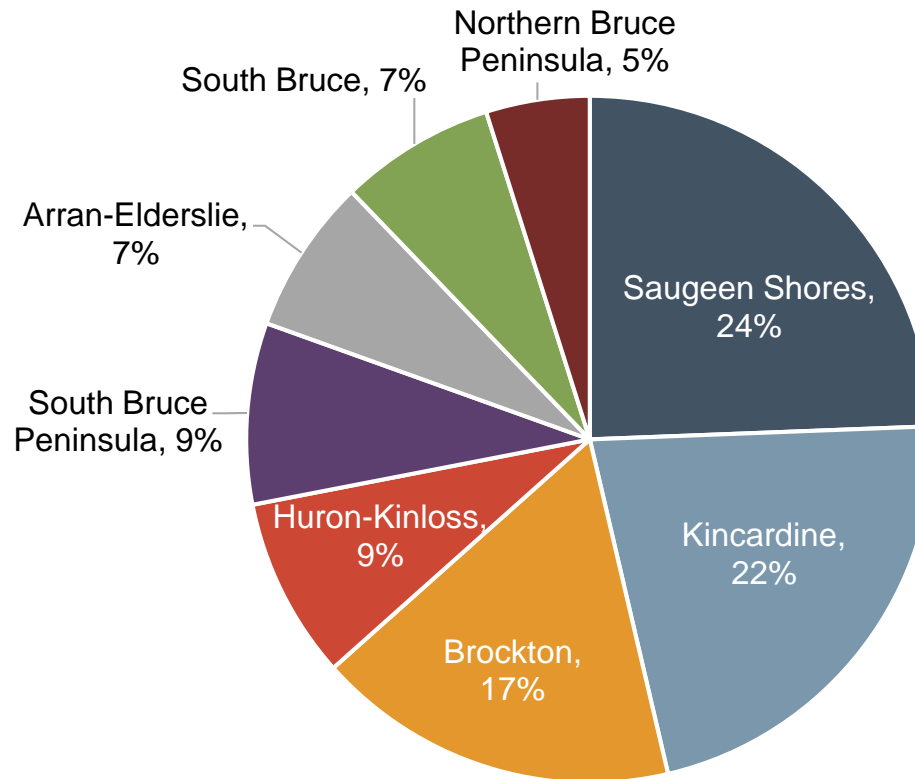


Bruce County Permanent Housing Growth by Local Municipality, 2021 to 2046



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

Bruce County Employment Growth by Local Municipality, 2021 to 2046



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

Bruce County Residential and Non-Residential Land Needs Analysis



Bruce County Urban Residential Land Needs, 2021 to 2046

Land Supply

17,570
Housing
Units

Land Demand

8,680
Housing
Units

Residential
Land Surplus

8,890
Housing
Units

Bruce County Urban Employment Land Needs, 2021 to 2046

244
net ha

Land Supply

173
net ha

Land Demand

Employment
Land Surplus

96
net ha

- All Local Municipalities Excluding Saugeen Shores and Brockton
- Surplus of 89 ha in Kincardine

Employment
Land
Shortfall

25
net ha

- Saugeen Shores and Walkerton Urban Areas

Defining a Regional Market Area

What We Heard

- Provincial direction is that the upper-tier municipality (County) will normally serve as the regional market area (RMA).
- Feedback was received indicating the need to consider sub-regions to reflect the variability across Bruce County, particularly as it relates to housing affordability.

Recommended Directions

- Define affordability through three sub-regional RMAs.
- Determine land needs at the County-level. Adjustments to the RMA at the sub-regional model do not significantly change the outcome of the land needs analysis.
- Through either of the two above-referenced approaches, there would be no shortfall of residential land at an RMA level by 2046, meaning that no area municipality needs to expand its urban boundary to accommodate a residential shortfall at the local level.

Next Steps



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- The Plan the Bruce: Good Growth Discussion Paper be endorsed as a foundation for developing policies in the new Official Plan.
- Continue to monitor the County's growth outlook over the next several years. If a significant change in outlook were to occur within the short-term, there would be an ability to re-open and update the County-wide growth forecast within five- to ten-years time as part of the County's next OP review.