

County of Grey Growth Management Strategy – Update 2021

Growth Forecasts to 2046



COUNTY OF GREY
JULY 22, 2021

Final

Today we will discuss...

- Demographic Trends and Key Inputs for Growth Forecasts
- County-Wide Forecasts
 - Population
 - Households and Housing by Unit Type
 - Employment and Employment by Land Use Type
- Distribution of Growth to Area Municipalities
 - Population
 - Households and Housing by Unit Type
 - Employment and Employment by Land Use Type

County-Wide Forecasts – Recent Population Growth

- County experienced significant up-tick in population growth from 2016—the change was immediate and substantial
- Recent rapid growth reflects closer connectivity to GGH and rapid development of lakeshore communities
- Impact of COVID lockdown appears to be short-lived and slight. There are signs of COVID-induced in-migration that could translate into permanent settlement
- Indications are for sustained high growth in near-term—lots of development activity in Grey

Year	Total Population ¹	Population Growth	Annual Growth Rate
2016	96,300		
2017	97,750	1,450	1.5%
2018	99,100	1,350	1.4%
2019	100,450	1,350	1.4%
2020	102,010	1,560	1.6%
2021	103,330	1,320	1.3%

Source: Hemson Consulting Ltd.

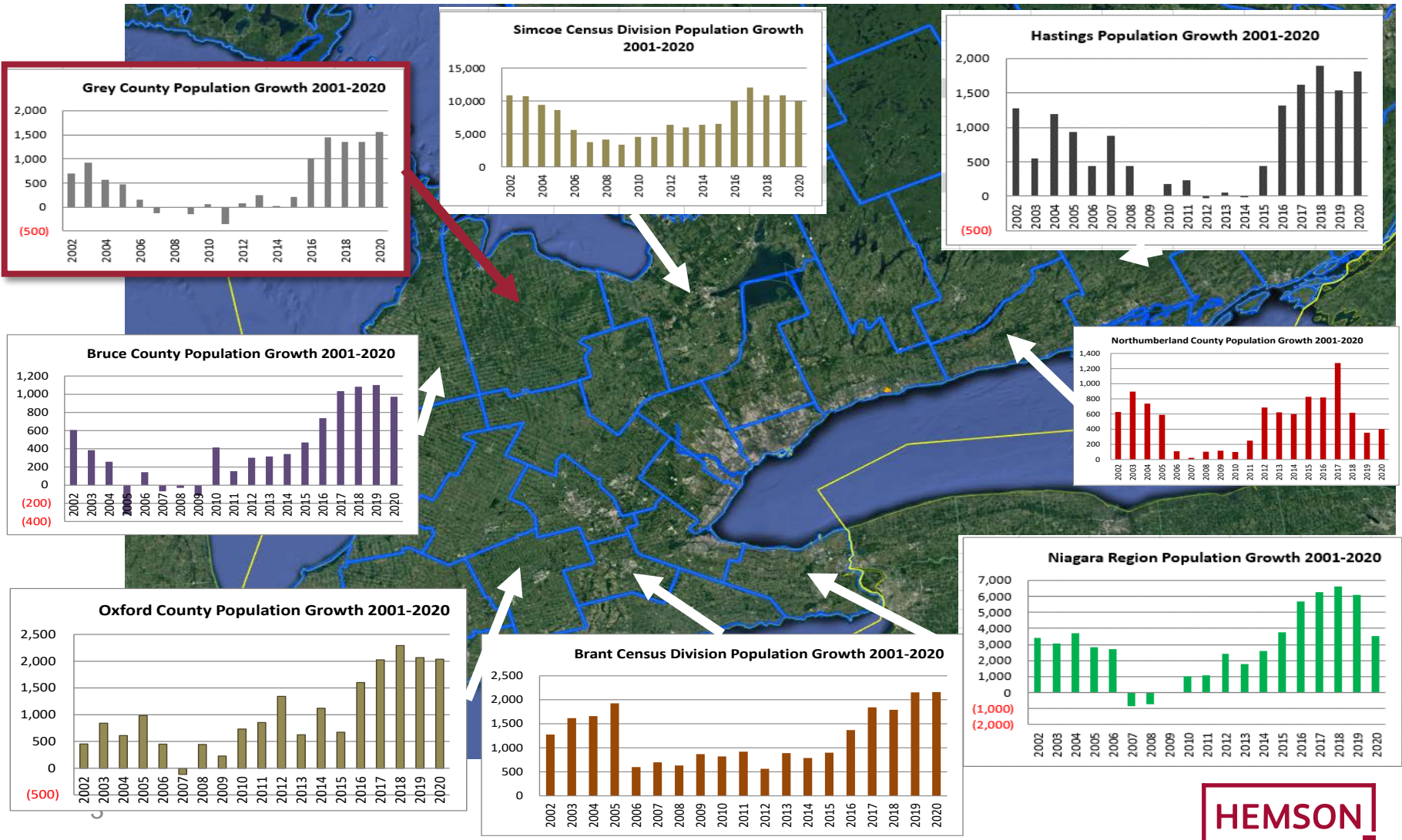
1: Total population includes Census Net Undercoverage

Grey County Population Forecast Comparison			
Year	2018 GMS	2020 Update	Difference
2016	96,070	96,300	230
2017	96,670	97,750	1,080
2018	97,270	99,100	1,830
2019	97,870	100,450	2,580
2020	98,470	102,010	3,540
2021	99,080	103,330	4,250

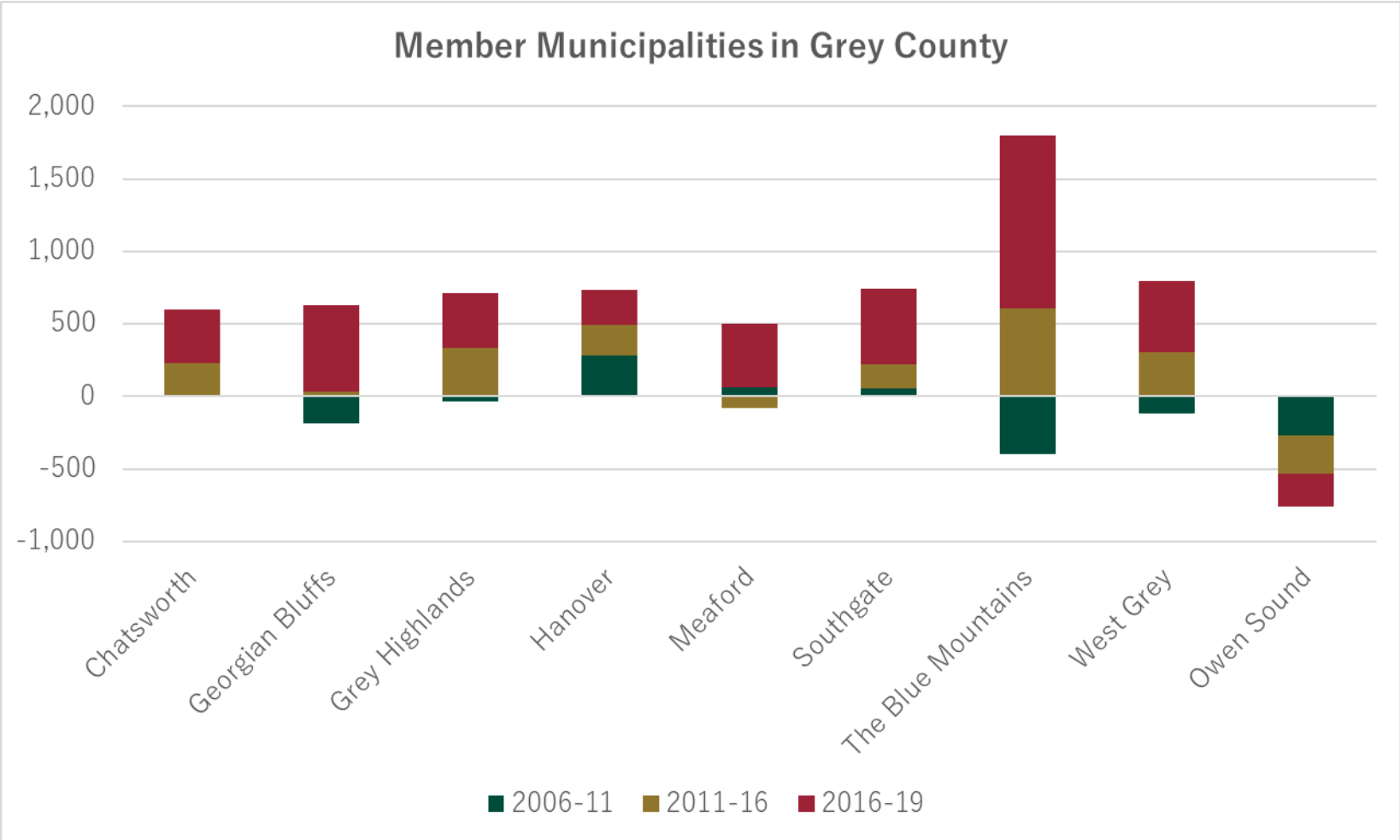
Source: Hemson Consulting Ltd.

1: Total population includes Census Net Undercoverage

Highest Population Growth in Decades Now Occurring at Edges of GGH

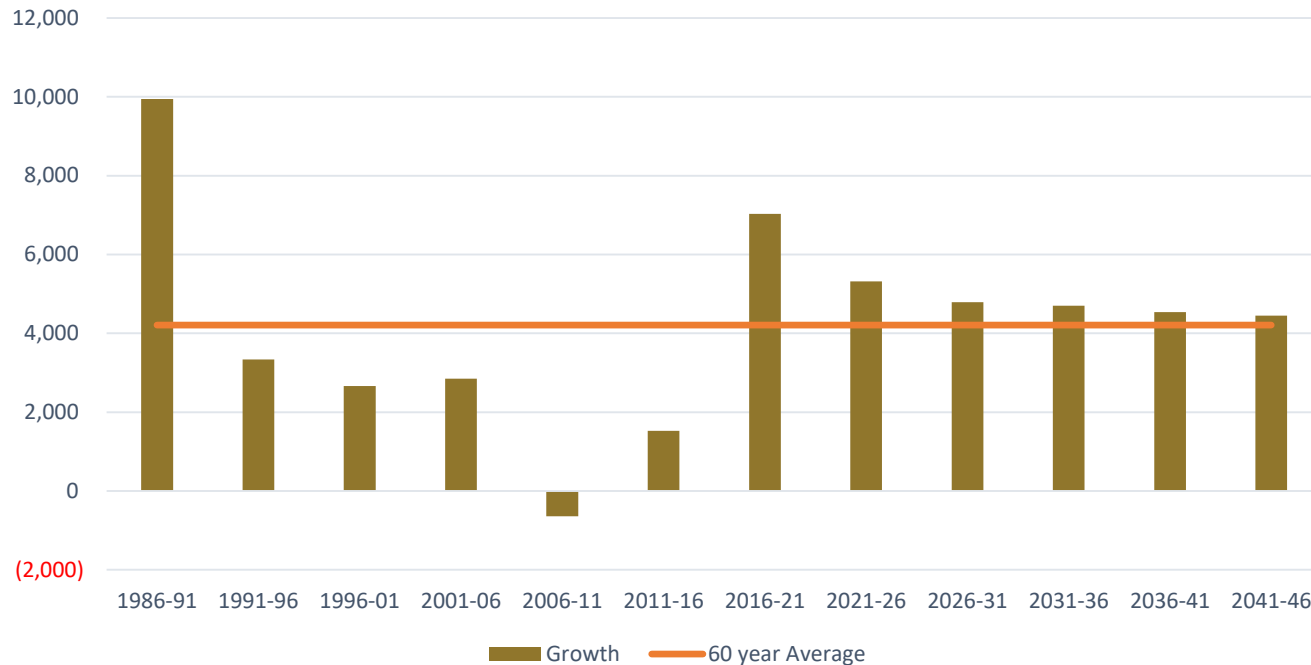


Recent Growth Surge is Evident Throughout the County



County-Wide Forecasts – Population

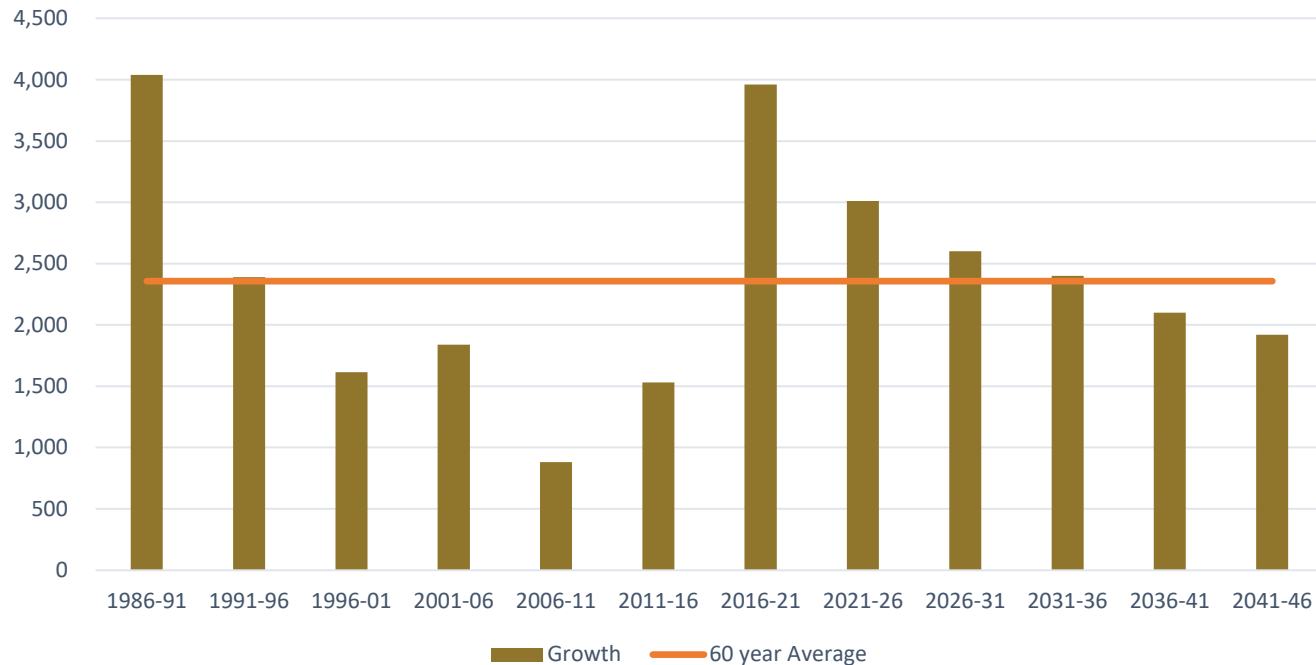
Total Population Growth to 2046



- New forecasts exceed previous 2018 GMS forecasts
- Population will grow from 103,000 in 2021 to 127,000 by 2046
- Long-term growth expectations higher than MOF projections of 121,400
- County will increasingly feel the effects of an aging population

County-Wide Forecasts – Households

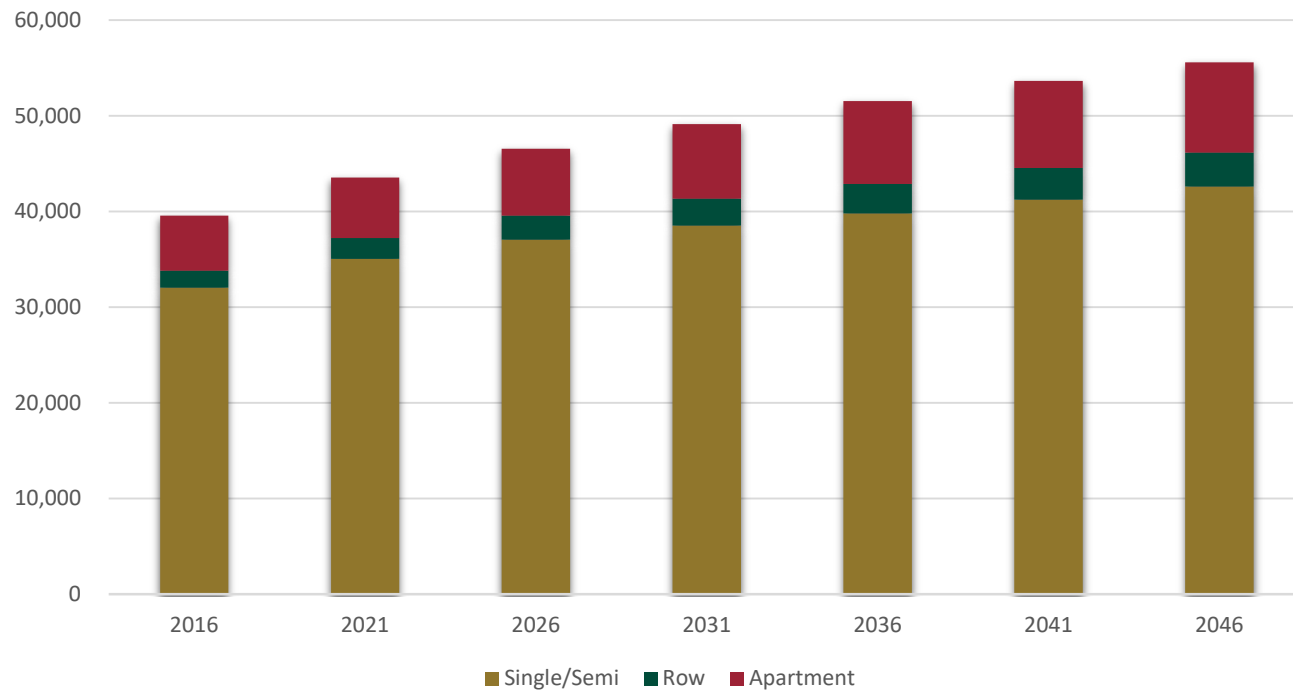
Occupied Household Forecast to 2046



- Population by age translated into households and housing by unit type
- Short-term housing growth based on local building permit issuance and active plans of subdivision
- Seasonal unit forecast “layered onto” forecast of permanently occupied units
- Approximately 10,500 units forecast between 2021 and 2046

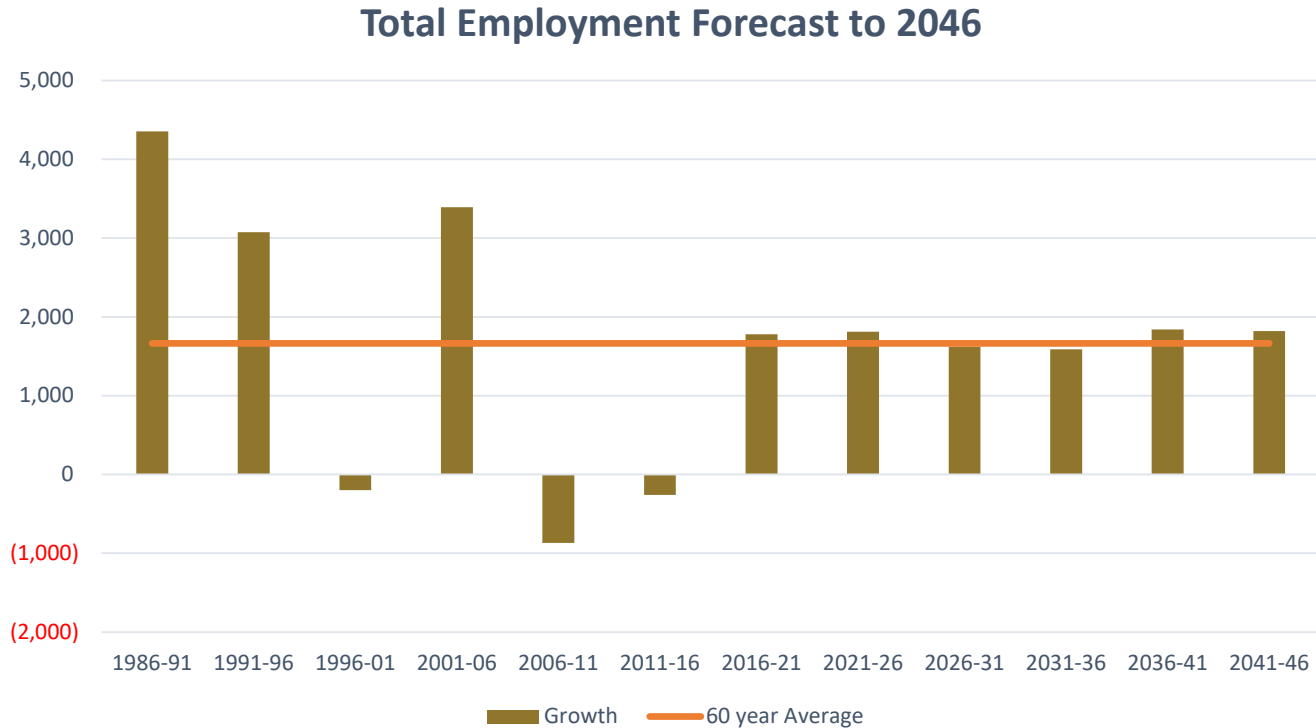
County-Wide Forecasts – Housing by Type

Market Housing Forecast by Unit Type



- Housing by type reflects market trends, housing preference by age and, to a lesser extent, planning policy and housing incentives
- Future growth mix assumes a slight shift away from singles/semis towards rowhouse forms
- Apartment forms to increase from current 14% to a peak of 17% in early 2040s

County-Wide Forecasts – Employment

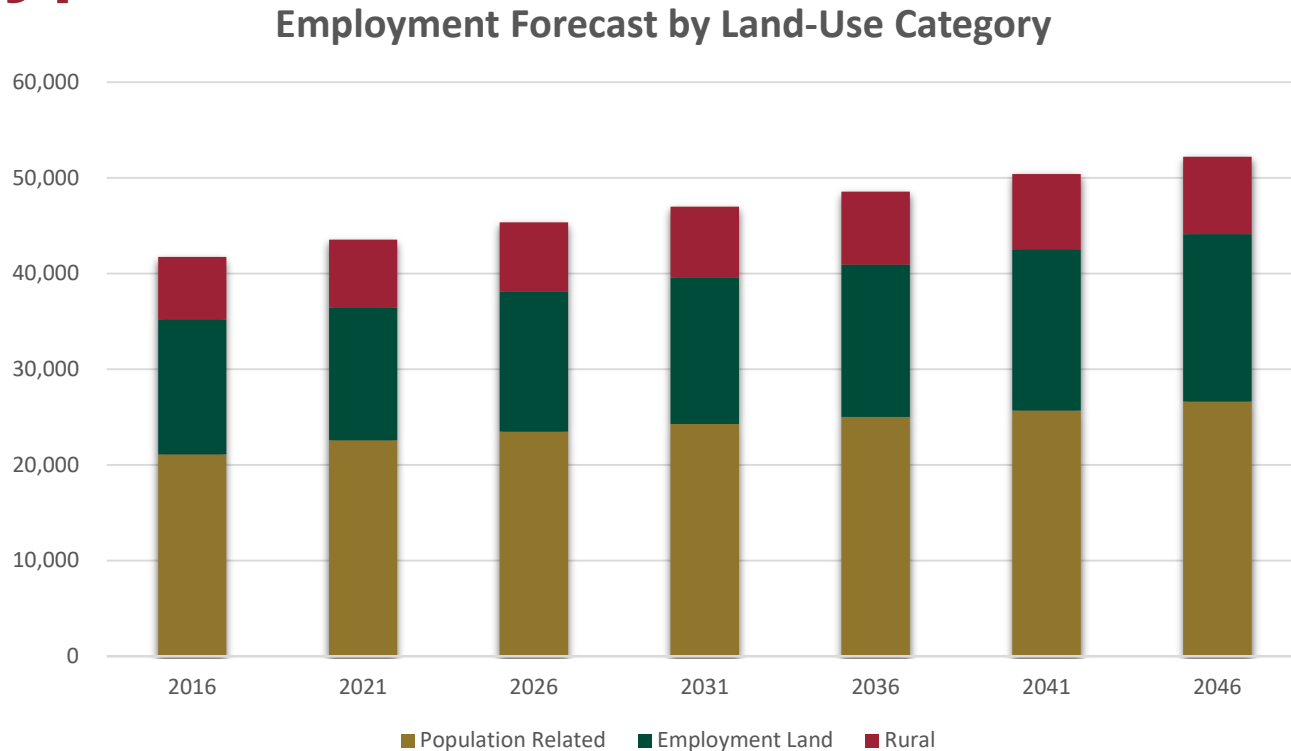


- County-wide employment forecast driven in part by population increase
- Short-term COVID-19 impacts suggest effects of jobs lost in food, accommodation, and tourism offset by increased day trippers, seasonal home use, and in-migration from work-at-home workers and early retirees

Employment Categories Based on Land Use

Employment Category	Economic Sectors in Grey	Implications for Planning and Allocation
Population-related	Primarily serves local residents (permanent and seasonal): retail, accommodation, food, education, health care, local government, and work-at-home jobs	Generally planned for through community plans focused on residential areas.
Employment land	Manufacturing, wholesale, transport, construction	Accommodated primarily in low-rise industrial-type buildings, mostly in business parks and industrial areas.
Rural	Agriculture, small-scale manufacturing and construction, tourism, recreation	Located outside urban land designated for industrial or commercial use

County-Wide Forecasts – Employment by Type



- Population-related employment generally follows population distribution
- Distribution of employment land employment depends on available supply of new/vacant employment land
- Rural employment distribution based on historical trends

Allocation of Population

Grey County - Population Forecast by Area Municipality to 2046				
Year	2021	2046	Growth	Share
Town of the Blue Mountains	9,550	16,300	6,750	28.3%
Township of Chatsworth	7,240	7,980	740	3.1%
Township of Georgian Bluffs	11,210	12,780	1,570	6.6%
Municipality of Grey Highlands	10,590	11,920	1,330	5.6%
Town of Hanover	8,450	11,870	3,420	14.4%
Municipality of Meaford	11,800	13,480	1,680	7.1%
Township of Southgate	8,610	12,780	4,170	17.5%
Municipality of West Grey	13,360	15,110	1,750	7.3%
City of Owen Sound	22,510	24,910	2,400	10.1%
Grey County	103,320	127,130	23,810	100.0%

Source: Hemson Consulting Ltd.

- 2018 GMS assumed housing would be fairly evenly distributed (no area municipality had a greater than 18% share of County housing growth)
- The Blue Mountains still the focus of most housing growth and has largest share of units in County development pipeline (more than 50%)

Allocation of Housing by Unit Type

Grey County Household Forecast by Unit Type to 2046 by Area Municipality						
Census Year	2021			2046		
Unit Type	Single/Semi	Row	Apartment	Single/Semi	Row	Apartment
Town of the Blue Mountains	3,610	520	270	6,090	1,010	890
Township of Chatsworth	2,710	0	60	3,000	0	70
Township of Georgian Bluffs	4,380	30	130	4,930	60	250
Municipality of Grey Highlands	3,900	80	210	4,400	110	300
Town of Hanover	2,490	300	860	3,480	620	1,250
Municipality of Meaford	4,300	310	540	4,870	440	960
Township of Southgate	3,120	30	130	4,540	110	670
Municipality of West Grey	4,940	130	340	5,590	210	450
City of Owen Sound	5,610	750	3,780	5,700	980	4,590
Grey County	35,060	2,150	6,320	42,600	3,540	9,430

Source: Hemson Consulting Ltd.

- Hanover, a “full service” community, has potential for more housing growth and plans to achieve it
- Recent development in Shelburne is evidence of extended commuter relationship to GTA—will affect growth in Southgate

Allocation of Employment

Grey County - Updated Employment Forecast by Local Municipality to 2046				
Year	2021	2046	Growth	Share
Town of the Blue Mountains	5,220	6,810	1,590	18.3%
Township of Chatsworth	1,560	1,860	300	3.5%
Township of Georgian Bluffs	3,570	4,310	740	8.5%
Municipality of Grey Highlands	4,320	5,030	710	8.2%
Town of Hanover	5,120	6,590	1,470	16.9%
Municipality of Meaford	3,700	4,350	650	7.5%
Township of Southgate	2,120	3,120	1,000	11.5%
Municipality of West Grey	3,550	4,230	680	7.8%
City of Owen Sound	14,390	15,930	1,540	17.7%
Grey County	43,550	52,230	8,680	100.0%

Source: Hemson Consulting Ltd.

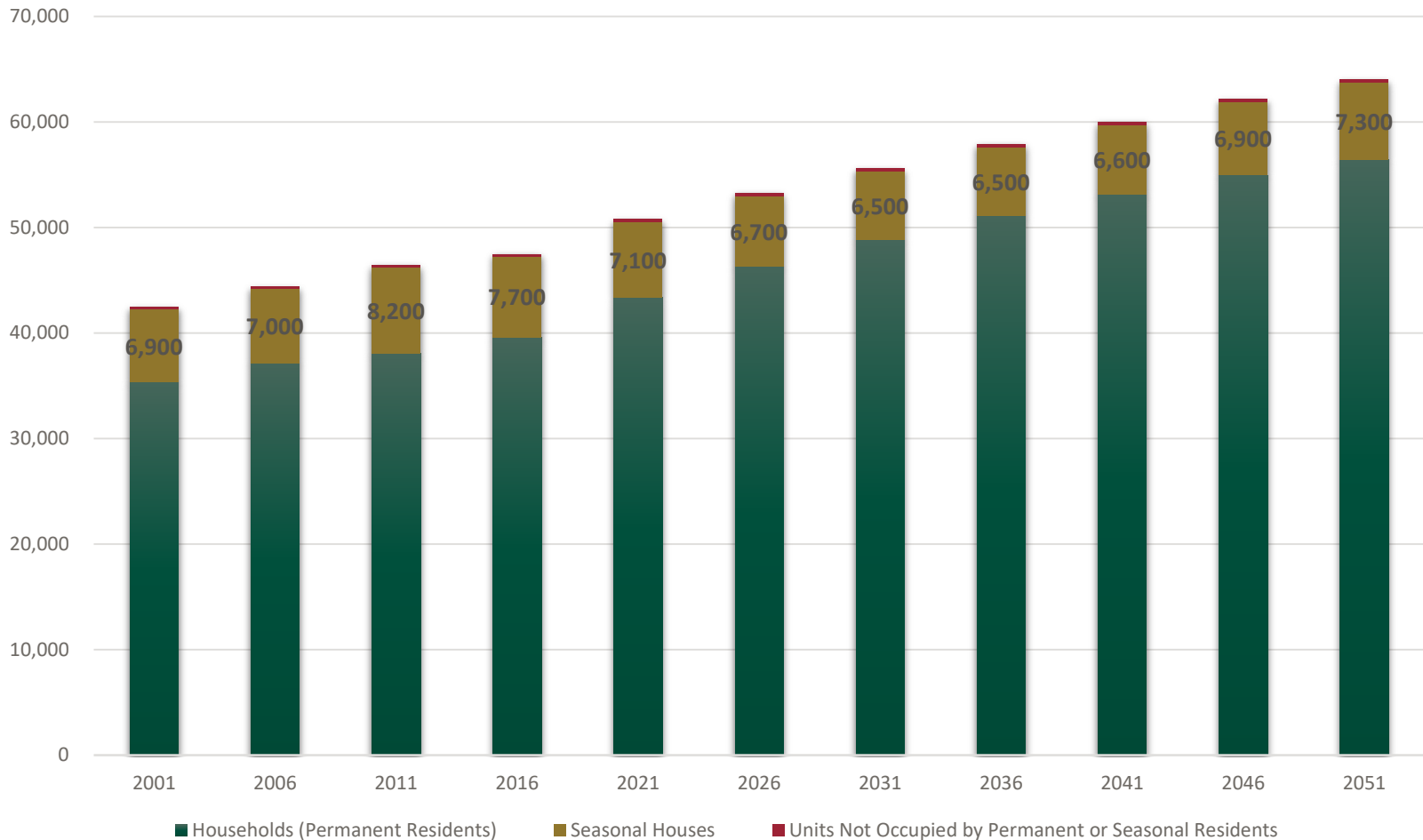
- Population-related employment will follow population growth
- Ability of area municipalities to provide serviced employment lands is an important consideration

Allocation of Employment by Land-Use-Based Category

Grey County Employment by Land Use Type to 2046 by Local Municipality						
Census Year	2021			2046		
Land Use Type	Population Related	Employment Land	Rural	Population Related	Employment Land	Rural
Town of the Blue Mountains	3,200	990	1,020	4,360	1,260	1,200
Township of Chatsworth	220	240	1,100	320	310	1,230
Township of Georgian Bluffs	330	2,450	790	590	2,810	910
Municipality of Grey Highlands	2,450	890	980	2,640	1,280	1,110
Town of Hanover	3,740	1,380	0	4,730	1,860	0
Municipality of Meaford	2,180	760	760	2,450	990	910
Township of Southgate	810	280	1,030	1,380	570	1,170
Municipality of West Grey	850	1,300	1,390	1,080	1,600	1,550
City of Owen Sound	8,800	5,590	0	9,100	6,830	0
Grey County	22,580	13,880	7,070	26,650	17,510	8,080

Source: Hemson Consulting Ltd.

County-Wide Seasonal Housing Unit Estimate



Allocation of Seasonal Housing Unit Estimate

Seasonal Unit Estimate by Area Municipality								
	2016	2021	2026	2031	2036	2041	2046	2051
Town of the Blue Mountains	3,090	2,850	2,730	2,650	2,610	2,690	2,770	2,930
Township of Chatsworth	420	390	370	360	360	370	380	400
Township of Georgian Bluffs	780	720	690	670	660	680	700	740
Municipality of Grey Highlands	1,340	1,240	1,190	1,150	1,130	1,170	1,200	1,270
Town of Hanover	70	60	60	60	60	60	60	60
Municipality of Meaford	730	670	650	630	620	640	660	690
Township of Southgate	270	250	240	230	230	230	240	250
Municipality of West Grey	550	510	490	470	470	480	500	520
City of Owen Sound	450	420	400	390	380	390	400	430

Source: Hemson Consulting Ltd.

Area Municipalities Have Been Key Partners Throughout

- Oct 2020 – initial consultation, including individual “interviews”
- Feb 2021 – circulation of draft results
- Detailed feedback and analysis received
- May-Jun 2021 – additional consultation with individual municipalities and their consultants

Thank You!