



A Simply Grand Plan



Welcome to this
Special Meeting of Council
on the New Official Plan

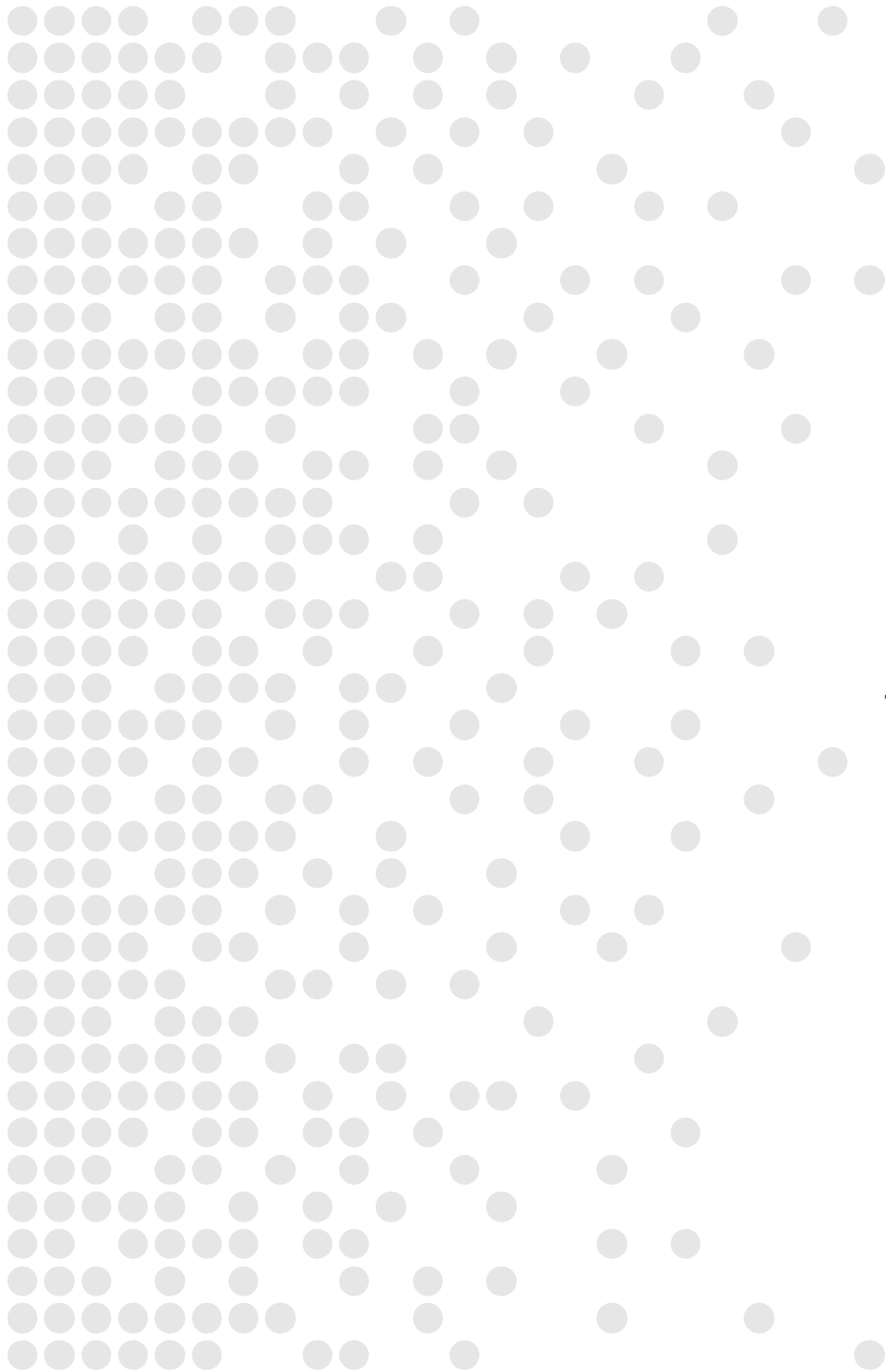
December 8th, 2020 @ 6:00pm





County of Brant Municipal Comprehensive Review (M.C.R.) Preliminary Findings

Special Meeting of Council
December 8, 2020



MCR Process

Overview

Municipal Comprehensive Review (MCR)



Overview

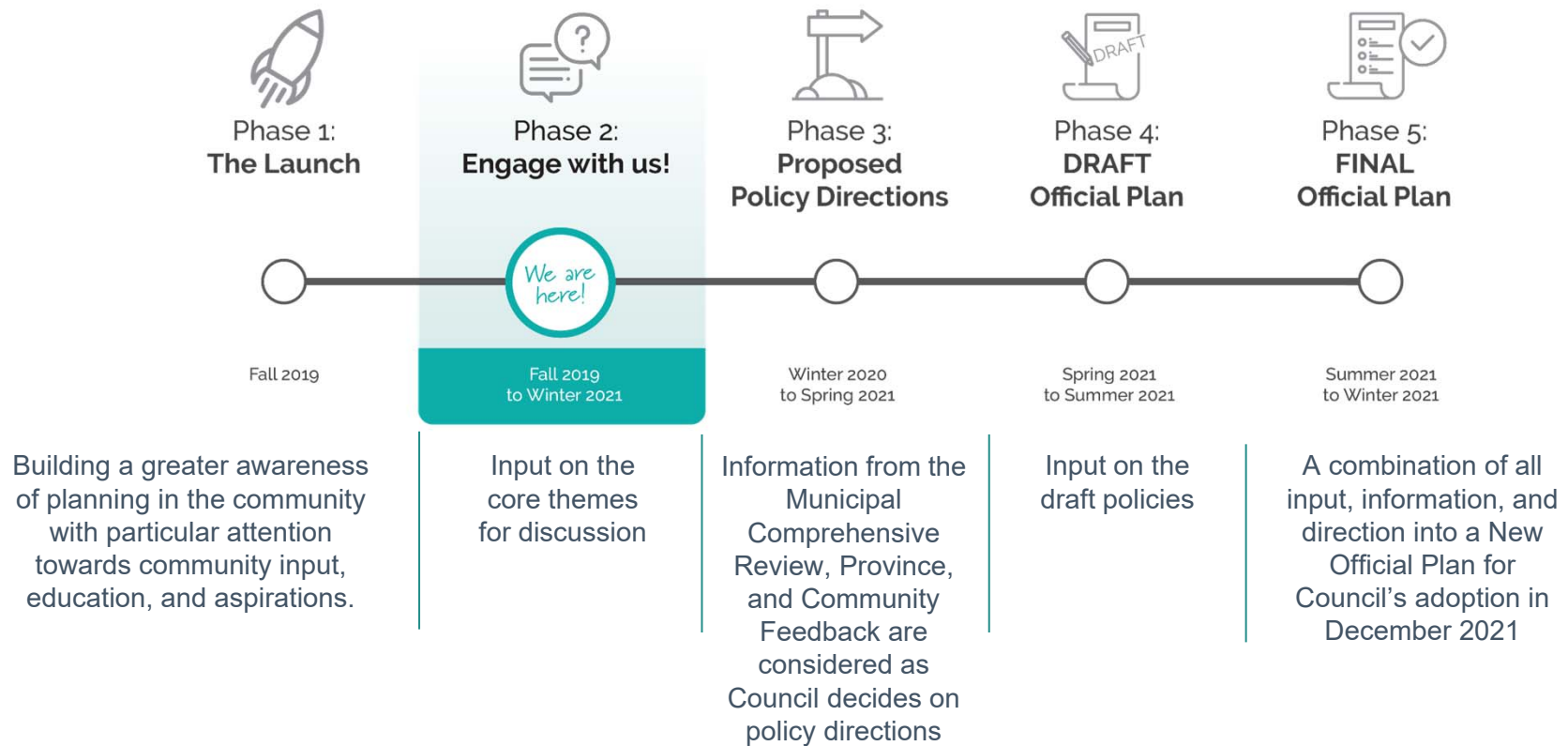
- The County of Brant is currently reviewing its Official Plan (O.P.). This process represents a Municipal Comprehensive Review (MCR), in accordance with section 26 of the *Planning Act*.
- A M.C.R. is part of the O.P. review process and used to establish a long-term vision and planning framework for a municipality that fosters a sustainable approach to future residential growth and economic development.



Purpose of Presentation

- The purpose of this presentation is as follows:
 - To provide Council with the preliminary findings of our technical analysis as it relates to two long-range County-wide growth scenarios to the year 2051.
 - To recommend a “preferred” long-range population, housing and employment growth scenario for the County.
 - This analysis will be used to inform growth allocations by urban and rural area, land need by Urban Settlement Area and County Official Plan direction to the year 2051.

Project Timeline

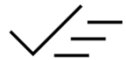


What Do We Need from Council to Ensure Success?



Aspirations & Achievements

What do you want from this Official Plan?



Step by Step feedback –

Input throughout from Council, public, and stakeholders

Meet Key Decision Dates:



Growth Management Scenarios

December 8, 2020



Land Needs Assessment & Urban Structure

March 2021

Draft Policy Writing Begins March 2021



Draft Official Plan Policies

Summer 2021



Final Official Plan

December 2021



Municipal Comprehensive Review in Progress

This review makes up the technical analysis that acts as the background information for the decisions we make about where and how to grow.

Five Major components:

1. Growth Management Strategy
2. County Land Needs Assessment
3. Settlement Boundary Review
4. Housing Strategy & Intensification Analysis
5. Employment Lands Analysis



Growth Management



Key Trend: Growth Management

It is one of the most important tools to shape how growth and development is happening in the County of Brant

It guides our decision making about topics of interest, including growth management

It anticipates what growth is expected to come so that we can choose where it will go, how it should look, and how long it will take.

It sets the foundation for land-use decision making in the County of Brant




A Simply Grand *Plan*

Growth Management (cont'd)



Provincial Forecasting

Our current population is approximately 41,000 residents

2051  59,000 Residents
26,000 Jobs



Several developments have already received approvals

+ 1,730 units to be built by 2026

+ 4,100 units by 2031


This is expected to amount to a population increase of about 8,000 residents.

Growth Management (cont'd)



Provincial Targets

The Province has provided intensity and densification targets to 2051


2051  59,000 Residents
26,000 Jobs



Density targets remain at 40 people and jobs per hectare

Residential Intensification Targets remain at 15% of all growth in built up areas resulting in a net increase in units.



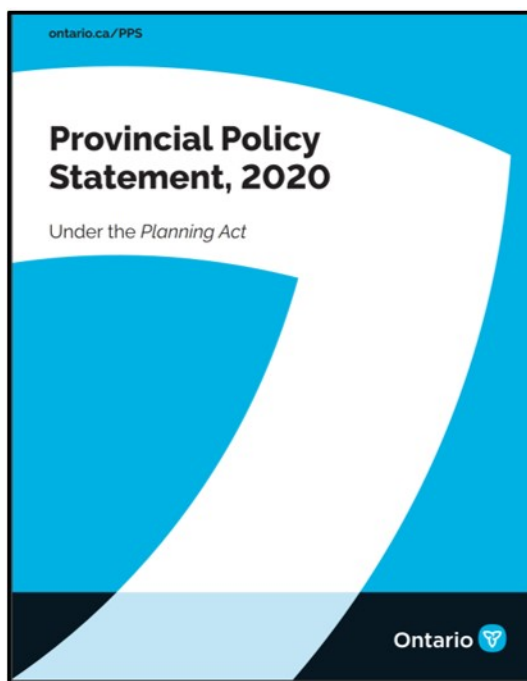


Policy Context and Growth Plan, 2020

Overview

Policy Context

Provincial Policy



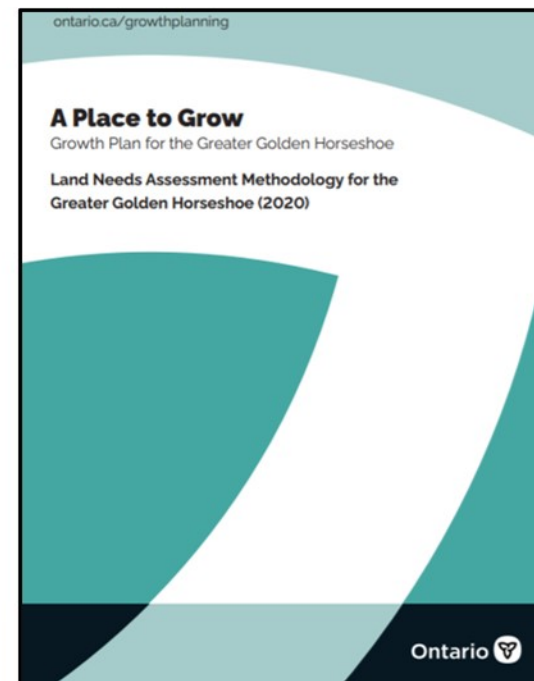
Provincial Policy Statement, 2020.

Updated and effective as of May 2020.



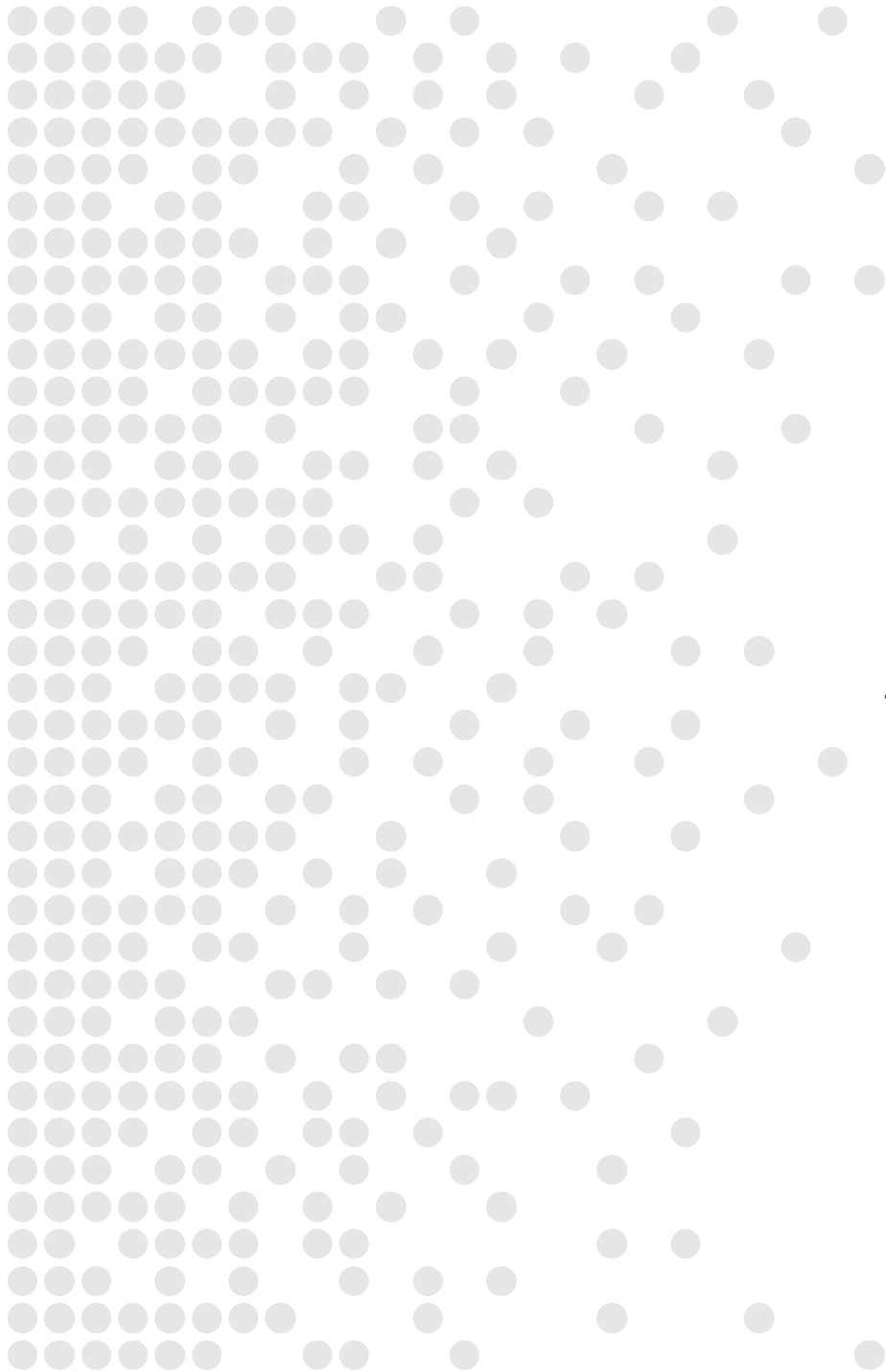
A Place to Grow, Growth Plan, Office Consolidation 2020 (Amendment to Growth Plan, 2019).

Updated and effective as of August 2020.



Land Needs Methodology for the Greater Golden Horseshoe, 2020.

Updated and effective as of August 2020.



Urban Structure

Overview



Hierarchy of Settlement Areas

- The Growth Plan includes two types of Settlement Areas:



Urban Settlement Areas

- Generally 400 households+
- Municipal servicing (Water/Wastewater)
- Complete Communities (opportunities to live/work)
- Focus of growth and development
- Identify land needs as well as excess lands

County of Brant: Paris and St. George



Rural Settlement Areas

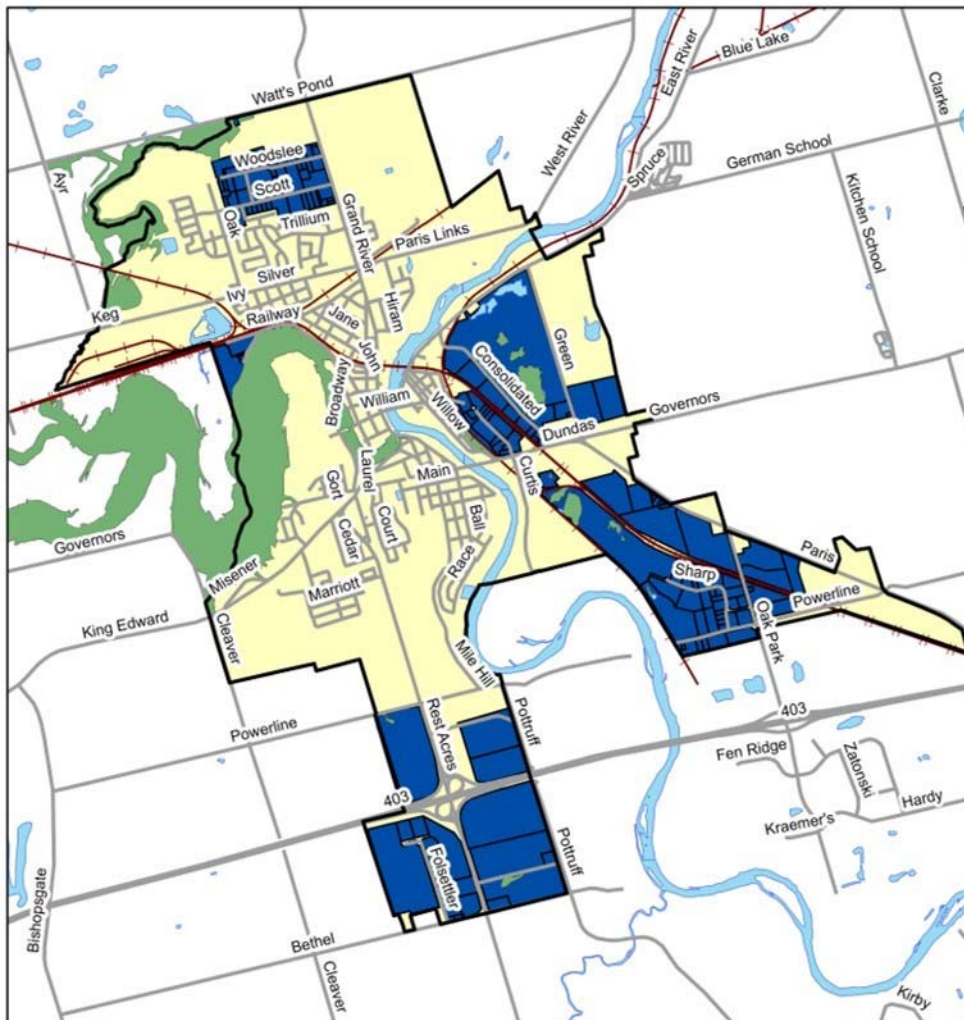
- Less than 400 households
- Generally considered hamlets or small villages
- Consistent with the rural system in the Greenbelt Plan and Oak Ridges Moraine Conservation Plan
- Private servicing (or partial municipal)
- “Rounding out” of existing developments and modest infill

County of Brant: 22 Communities


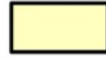




Urban Settlement Area – Employment Area and Community Area

Paris Urban Settlement Area



Paris Urban Settlement Area

-  Urban Settlement Area Boundary
-  Urban Community Area
-  Urban Employment Area
-  Natural Heritage System

Urban Community Area

- Residential
- Parks and community amenities
- Population-Related Employment
 - Institutional
 - Commercial (retail, services and offices)

Employment Area

- Industrial, export-based industries and supporting commercial uses



Employment Types and Policy Areas

- Location and type of employment

Community Area



Primarily Population-Related Employment

Urban Employment Area



Primarily Employment Lands Employment

Rural Area



Rural Employment Areas



Other Rural





County of Brant Growth Forecasts

Population and Housing



Population Growth Forecast, 2051

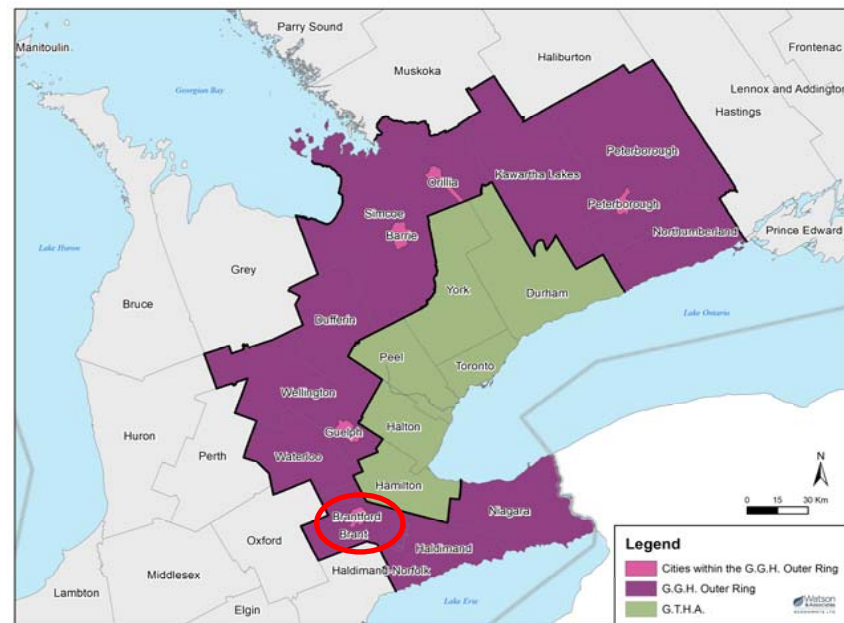
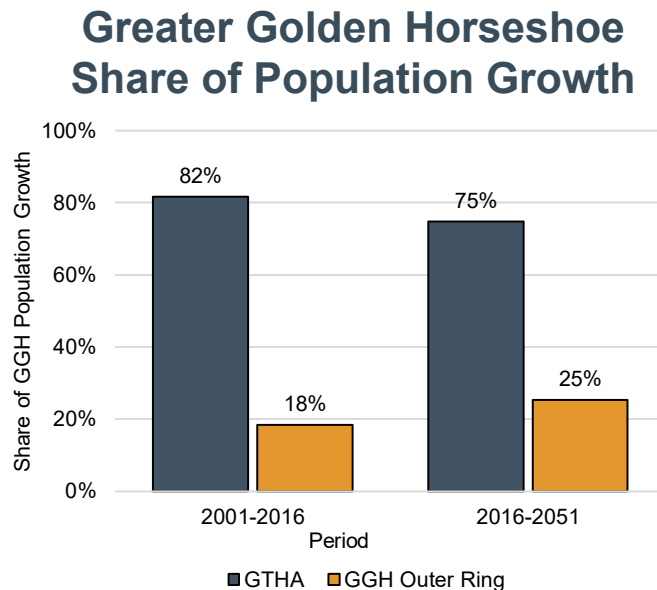
Growth Plan for the Greater Golden Horseshoe (Schedule 3)

Area	Population			2001 to 2016		2016 to 2051	
	2001	2016	2051	Total Population Growth	Annual Population Growth	Total Population Growth	Annual Population Growth
G.T.H.A.	5,807,000	7,180,000	11,172,000	1,373,000	91,500	3,992,000	114,100
G.G.H. Outer Ring	1,971,000	2,289,000	3,703,000	318,000	21,200	1,414,000	40,400
Total	7,778,000	9,469,000	14,875,000	1,691,000	112,700	5,406,000	154,500

Source: Derived from Growth Plan for the Greater Golden Horseshoe Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd.

Figure by Watson & Associates Economists Ltd., 2020.

Note: Population includes the net Census undercount. Figures may not sum to totals due to rounding.





Employment Growth Forecast, 2051

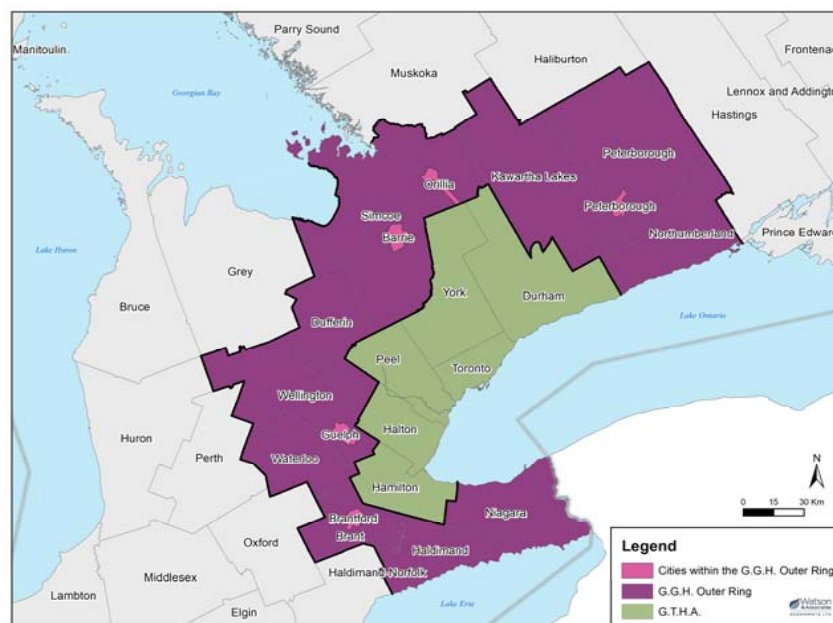
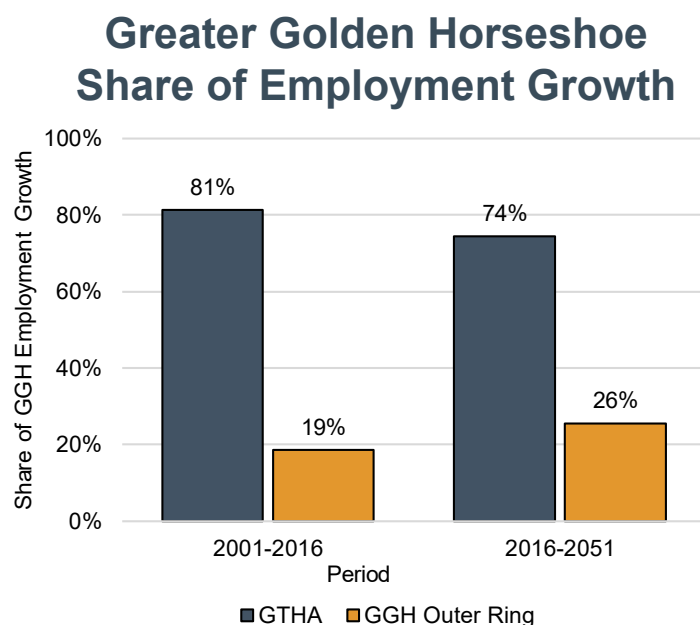
Growth Plan for the Greater Golden Horseshoe (Schedule 3)

Area	Employment			2001 to 2016		2016 to 2051	
	2001	2016	2051	Total Employment Growth	Annual Employment Growth	Total Employment Growth	Annual Employment Growth
G.T.H.A.	2,938,000	3,564,000	5,360,000	626,000	41,700	1,796,000	51,300
G.G.H. Outer Ring	863,000	1,008,000	1,648,000	145,000	9,700	640,000	18,300
Total	3,801,000	4,571,000	7,008,000	770,000	51,300	2,437,000	69,600

Source: Derived from Growth Plan for the Greater Golden Horseshoe Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd.

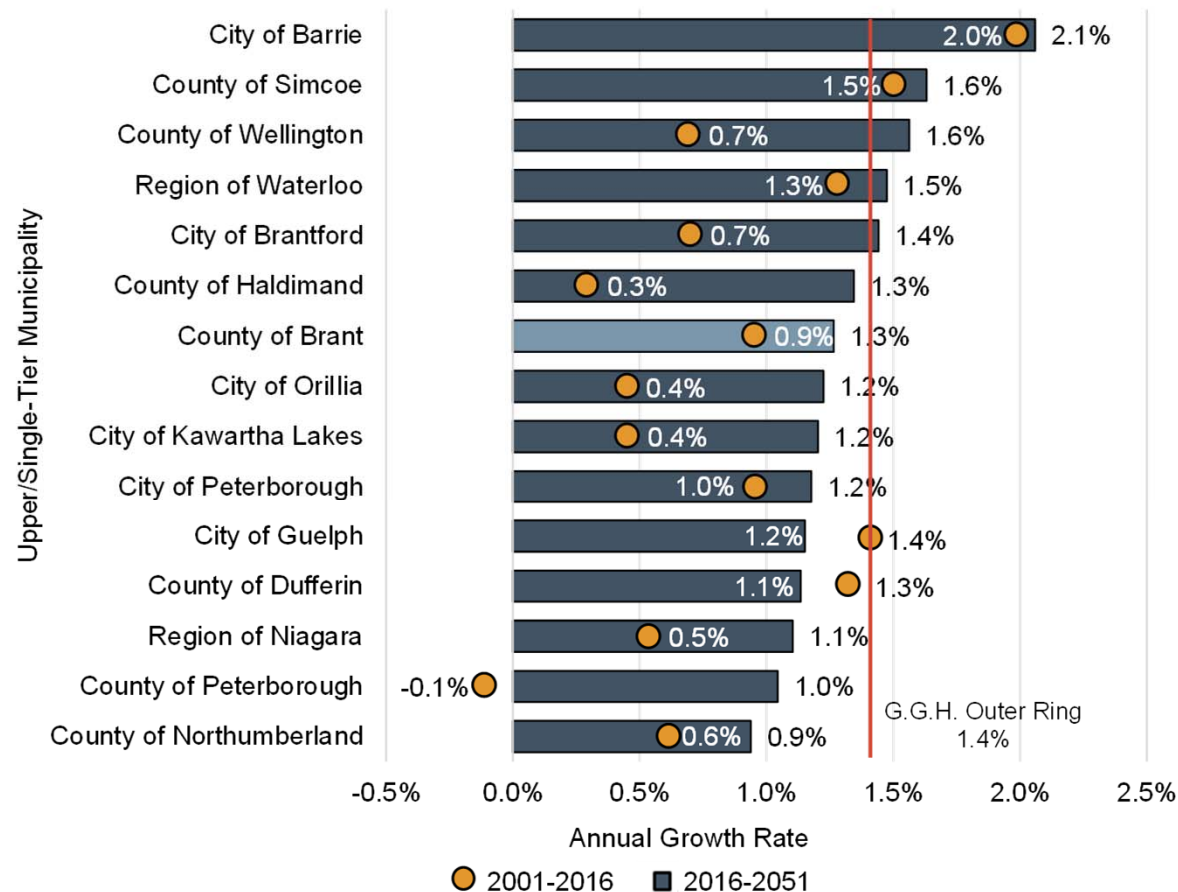
Figure by Watson & Associates Economists Ltd., 2020.

Note: Population includes the net Census undercount. Figures may not sum to totals due to rounding.





GGH Outer Ring Annual Population Growth Rate by Municipality, 2016-2051 (Schedule 3)

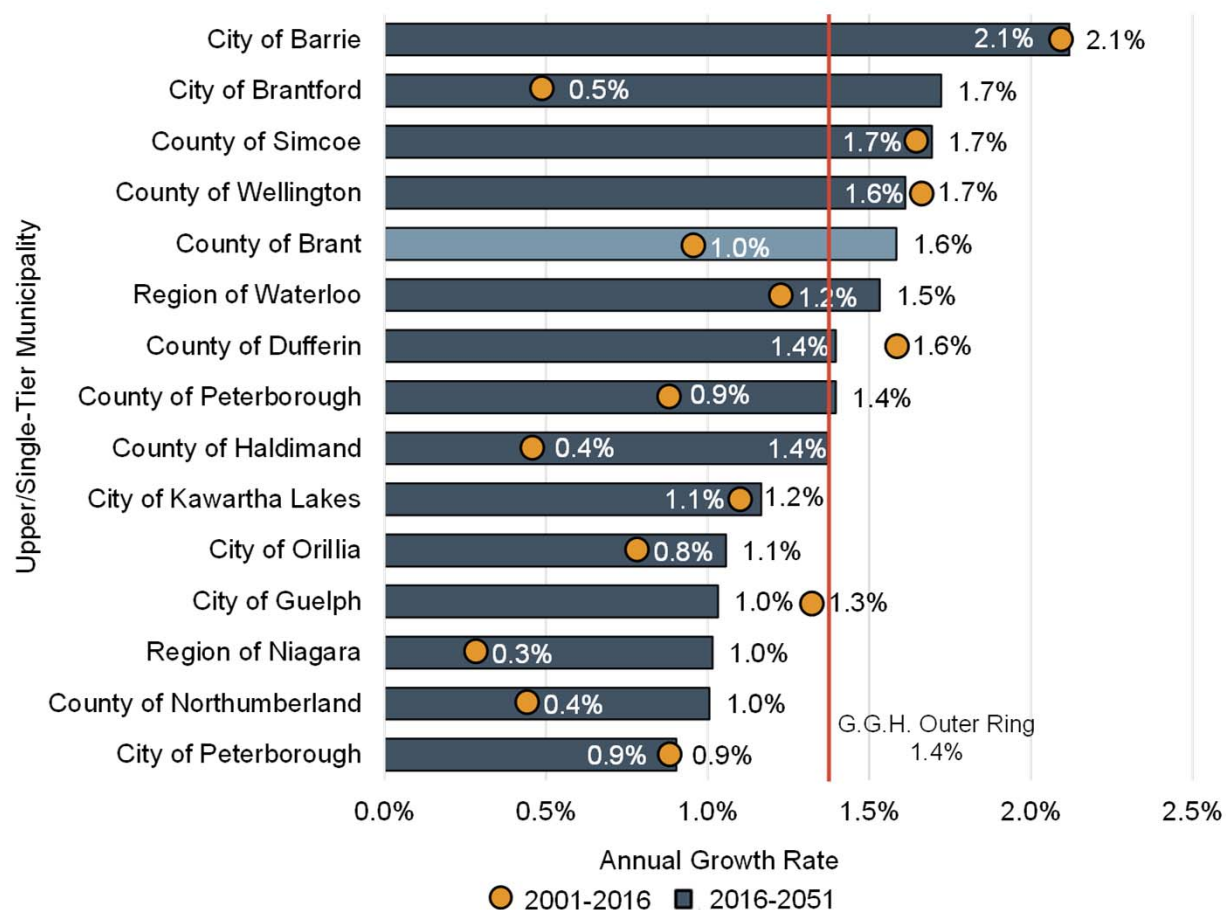


Note: Population includes the net Census undercount.

Source: Derived from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd., 2020.



G.G.H. Outer Ring Annual Employment Growth Rate by Municipality, 2016-2051 (Schedule 3)

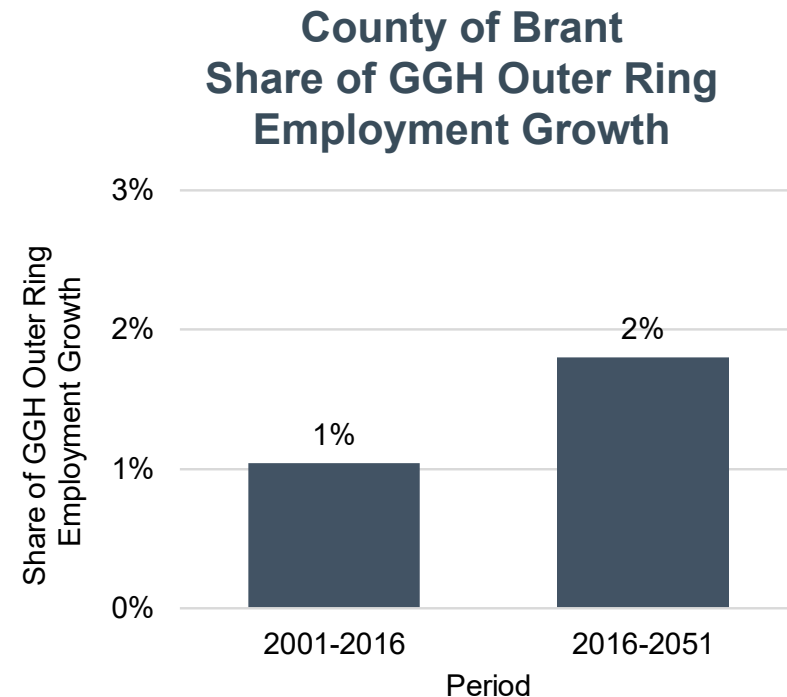
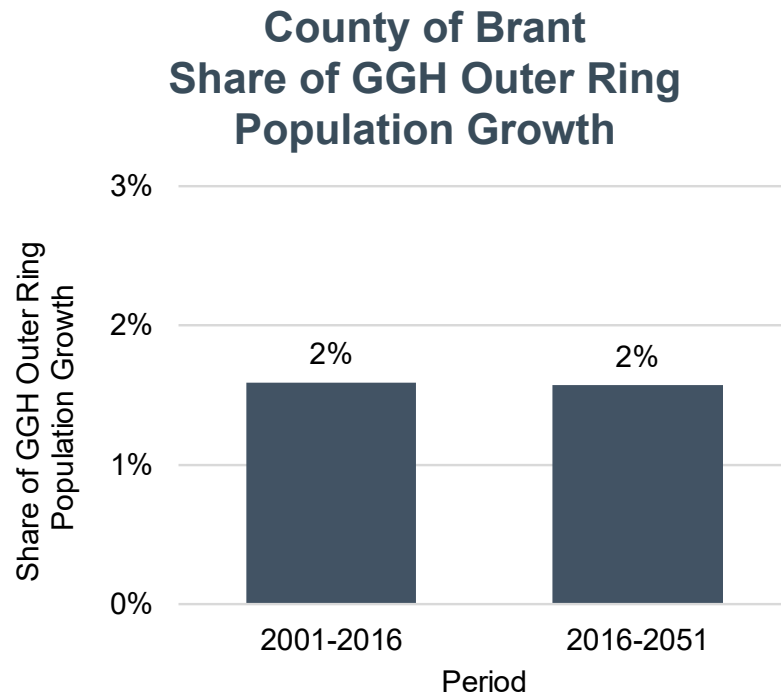


Source: Derived from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd., 2020.



Regional Context

County of Brant Outer Ring GGH Population and Employment Growth Share



- The County of Brant is forecast to increase its share of the GGH Outer Ring employment growth and maintain a stable share of population growth.

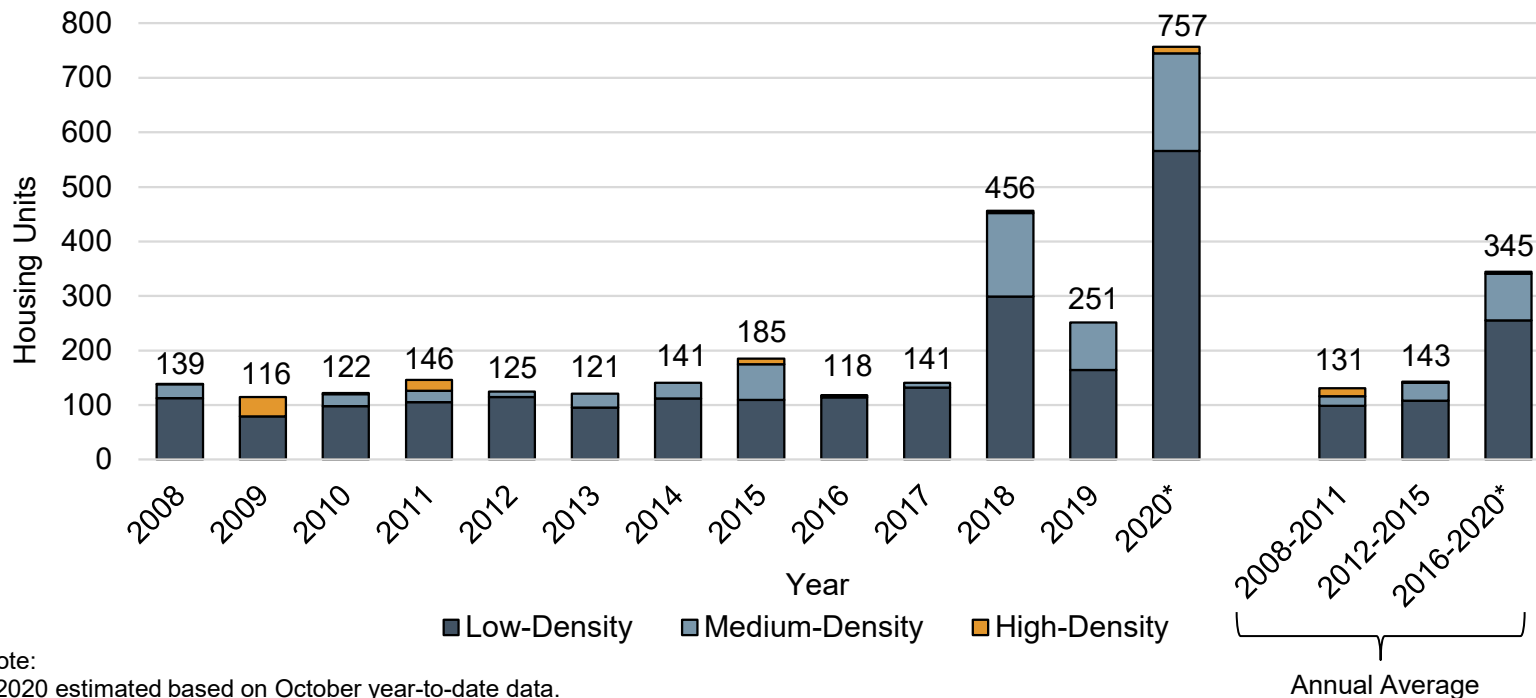
Recent Residential and Non-Residential Growth Trends in the County of Brant



County of Brant Historical Housing Activity

- Housing activity from issued building permits post-2016 is noticeably higher than in previous historical periods.

Residential Building Permits Issued for New Housing Units, 2008 to 2020

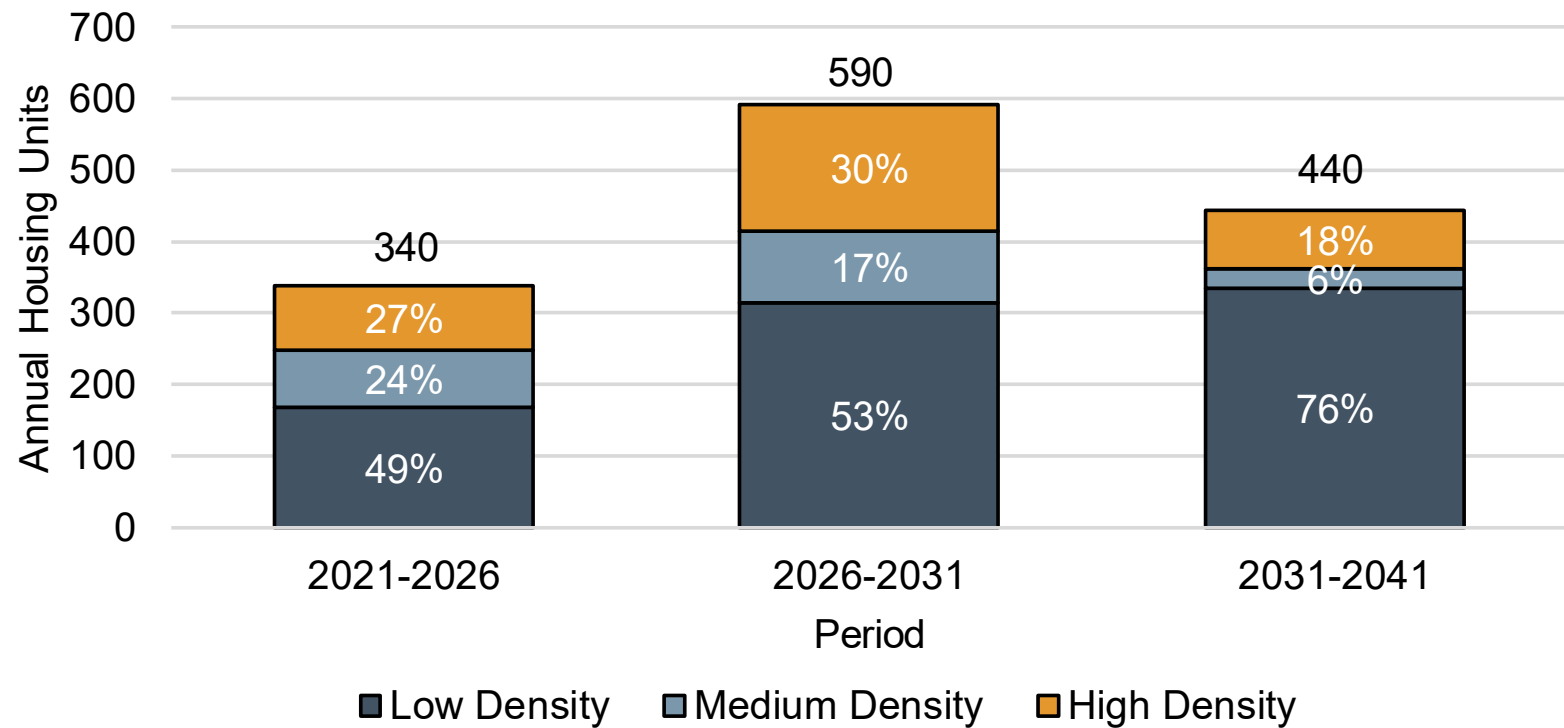


Source: 2008 to 2019 building permit data from County of Brant, and 2020 estimate based on October year-to-date data by Watson & Associates Economists Ltd., 2020.



County of Brant Housing Supply

- Active development applications indicate near-term and longer-term housing demand will be strong.

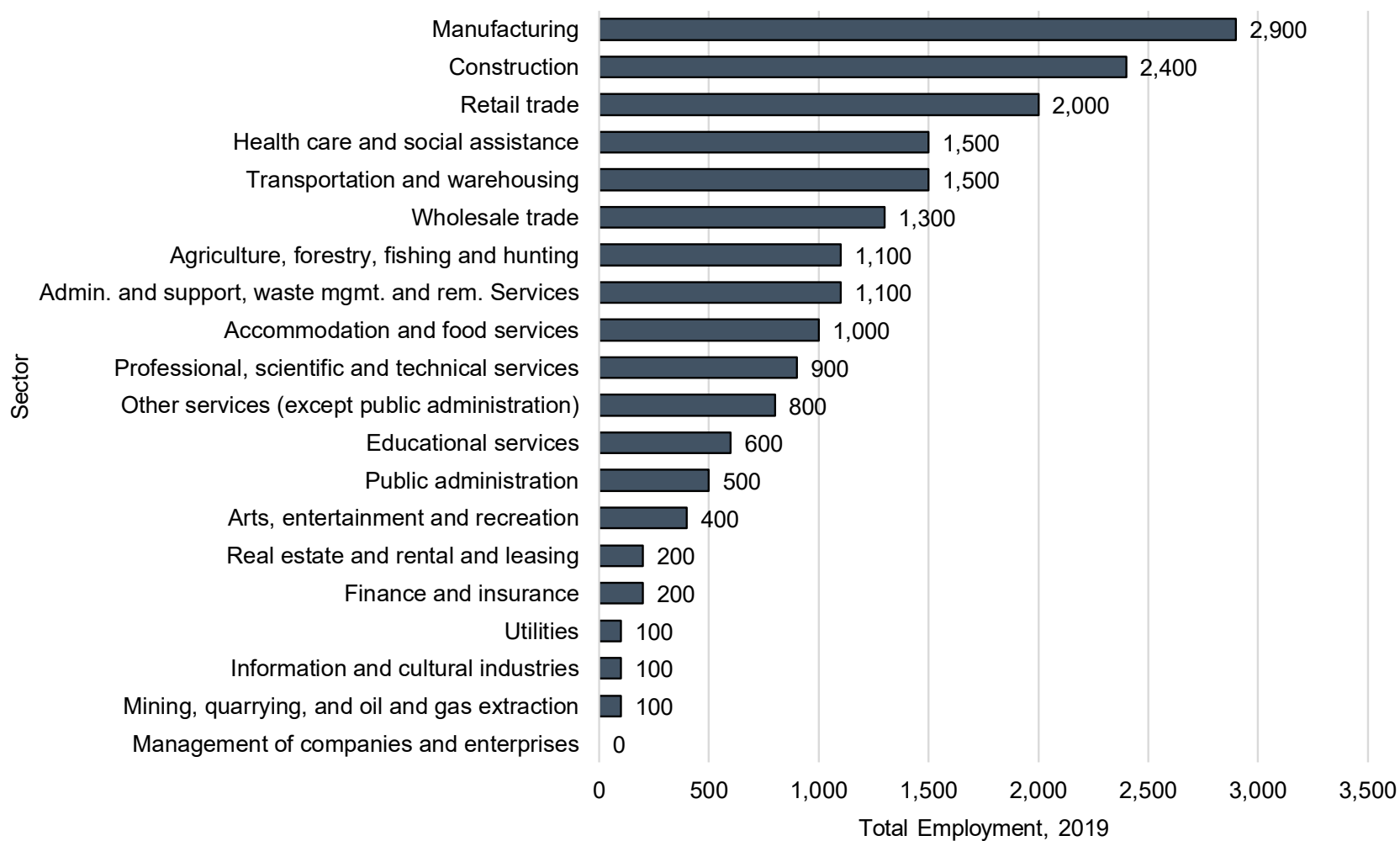


Source: Derived from residential supply data provided by the County of Brant, by Watson & Associates Economists Ltd., 2020.



Employment Base Overview

County of Brant Employment Base, 2019



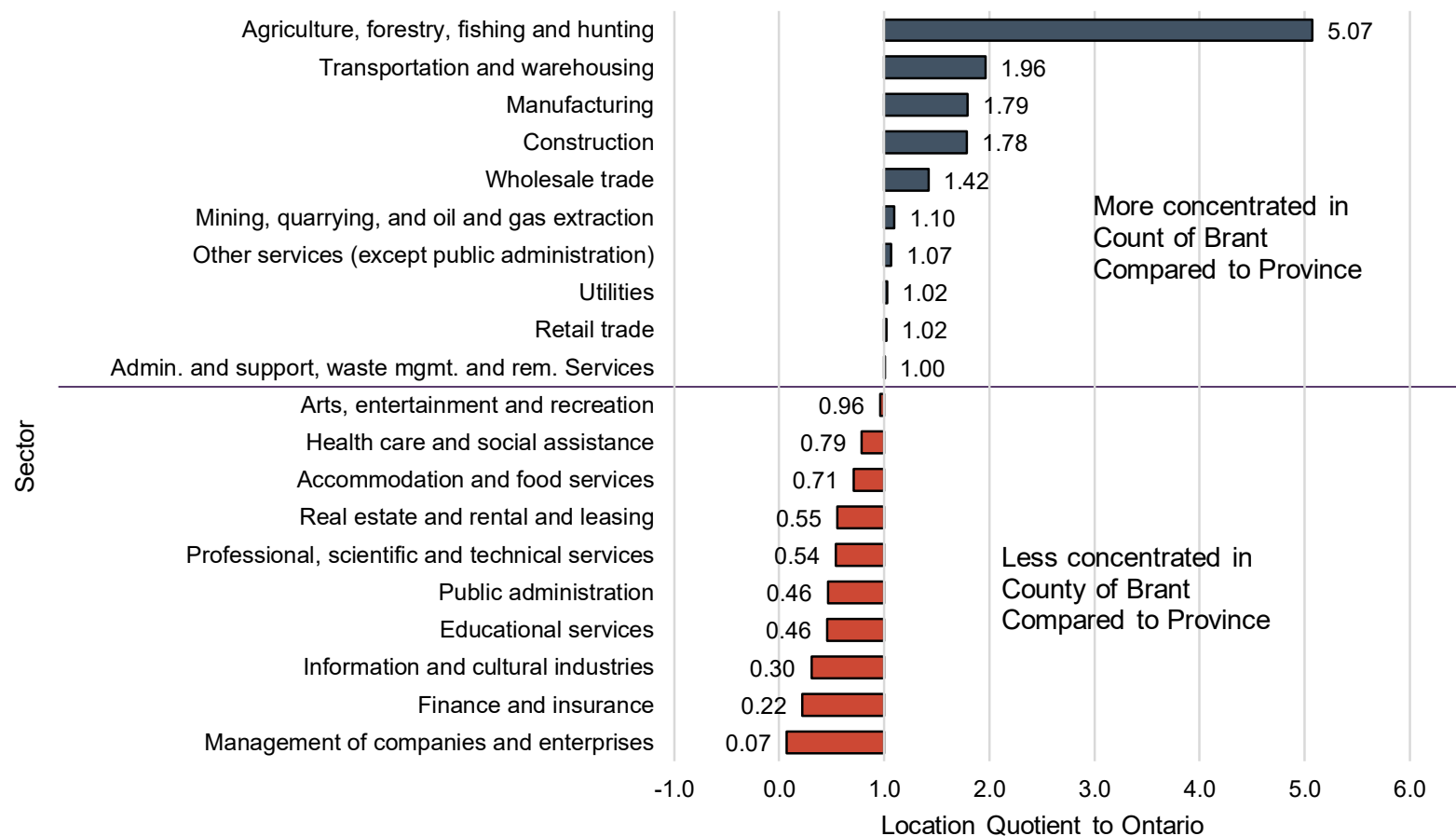
Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2020.

Note: Figure include employed and self-employed jobs. Figure has been rounded.



Employment Base Overview

County of Brant Employment Base Relative to Ontario



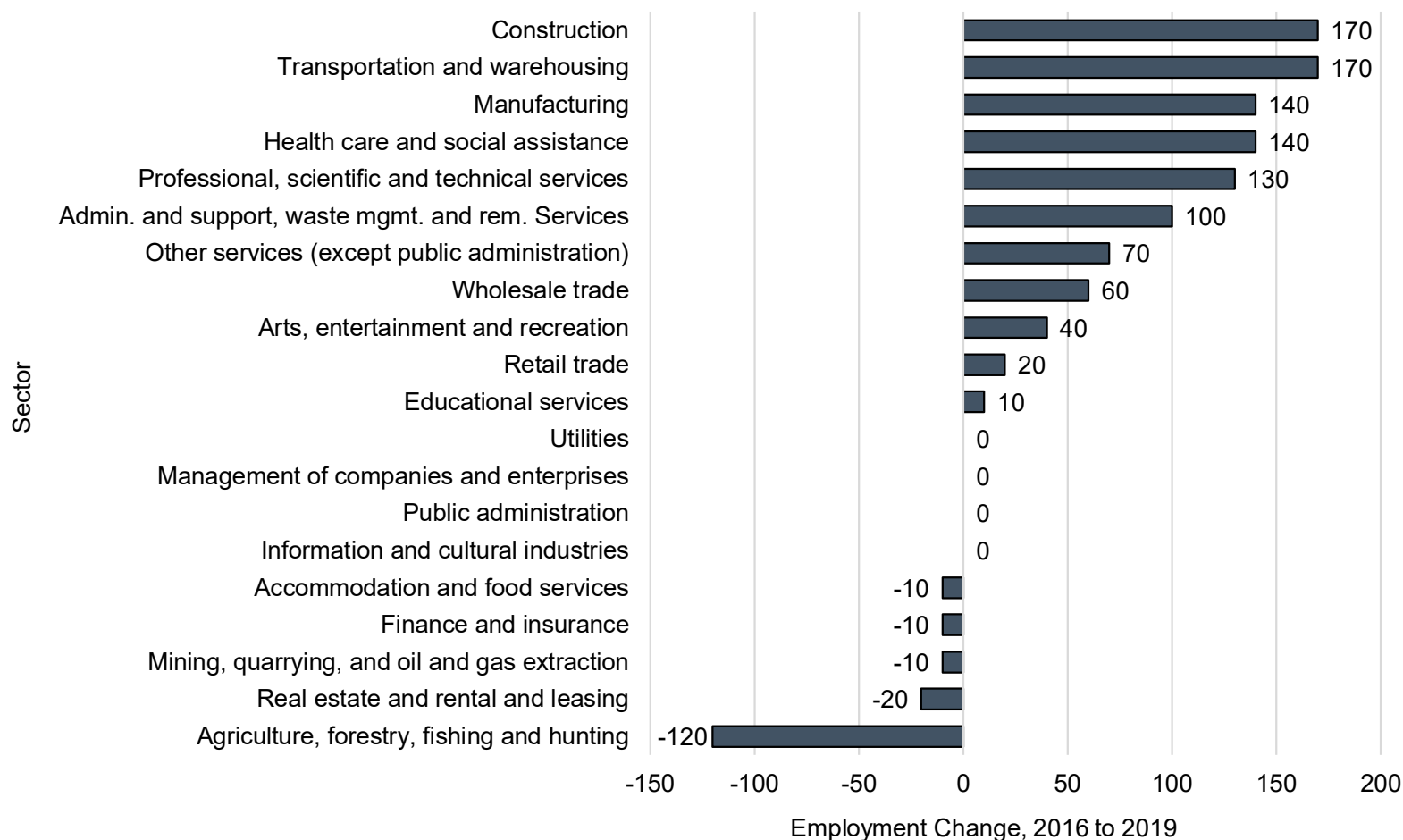
Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2020.

Note: Figure includes employees.



Employment Base Overview

County of Brant Recent Change in Employment, 2016 to 2019



Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2020.

Note: Figures include employed and self-employed jobs. Figure has been rounded. EMSI and Census data may differ.

County of Brant Drivers of Employment Growth



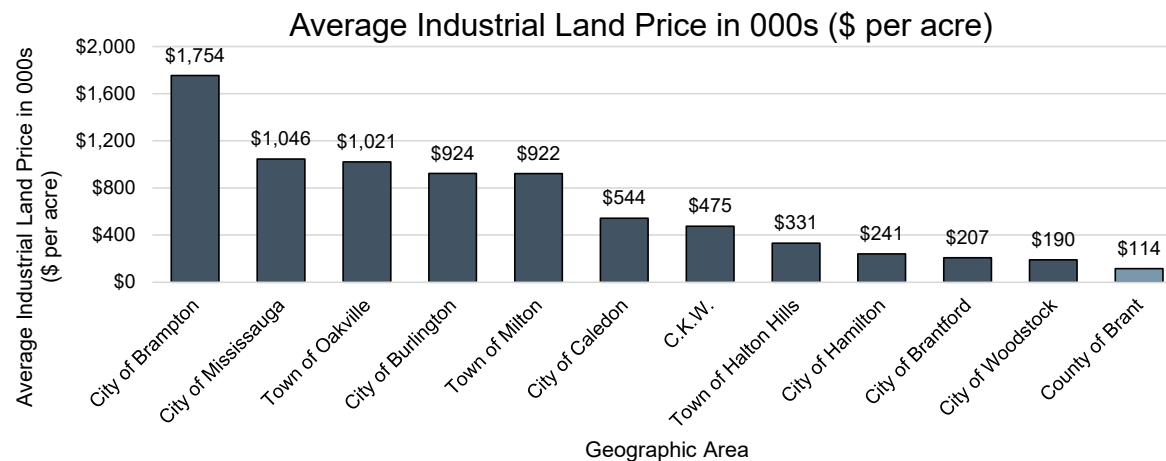
County of Brant Economic Drivers – Employment Land Employment (E.L.E.)

- Strong appeal for local and international businesses to locate in the County of Brant due to:
 - Access to major regional infrastructure (400 Series Highways, Hamilton Airport, Hamilton Port and Pearson International Airport);
 - Proximity to a number of large North American major employment and consumer markets;
 - Access to skilled labour and post-secondary institutions;
 - Access to the U.S. borders in Niagara and Windsor; and
 - Relatively cost-competitive development environment.



County of Brant Economic Drivers – Employment Land Employment (E.L.E)

- A major factor influencing the future competitiveness of the County's economic base relates to the quantity, structure and quality of its Employment Areas.¹
- Due to diminishing employment land supply in larger urban centres of the G.T.H.A., proximity to key infrastructure assets and the U.S. border, development is increasing in the west G.T.H.A., as well as the west G.G.H. and beyond along the Hwy. 401 and 403 corridor.
- When looking at non-residential tax rates, utility costs, availability and cost of industrial land, the County of Brant is more competitive than the surrounding area.²



Note: C.K.W. stands for the Cambridge, Kitchener, Waterloo area.

Source: Derived from 2018 and 2019 Colliers data except for County of Brant which was derived from 2018 to 2020 MPAC industrial land sale data, City of Brantford from 2017 to 2020 MPAC data and City of Woodstock from currently listed municipally owned industrial lands by Watson & Associates Economists Ltd., 2020.

¹ County of Brant Economic Development and Prosperity Discussion Paper, Spring 2020, Watson & Associates Economists Ltd.

² Ibid.



County of Brant Economic Drivers – Employment Land Employment (E.L.E.)

- Several established and emerging sectors have been identified in the County of Brant which are anticipated to drive future demand for employment land employment.
- Future demand along the Hwy. 403 corridor is anticipated in the logistics sector driven by competitive development cost and the strategic location for these operations.
- Advanced manufacturing is an established sector and should be a focus of growth for the automotive and aerospace, biotechnology, and machine and metal fabrication industries.¹



¹ County of Brant Economic Development Strategy & Action Plan, March 2019, McSweeney & Associates.



County of Brant Economic Drivers – Employment Land Employment (E.L.E.)

- Growing demand related to knowledge-based and technology-driven industries (e.g. business management, computer system design and related services, professional, scientific and technical services, etc.)¹ requires that the County's Employment Areas provide for a wider range of amenities and employment-supportive uses that complement both knowledge-based and traditional industrial sectors.



¹ County of Brant Economic Development Strategy & Action Plan, March 2019, McSweeney & Associates.



County of Brant Economic Drivers – Rural Employment (R.E.)

- Home to approximately 700 farms and 165,300 acres of farmland in 2016, agricultural activities are significant to the overall County of Brant economy.
- Agri-business and food processing provide an opportunity to deepen agricultural activity and increase productivity of the industry by providing value-add products (potential tourism driver) and services.
- Nearly 60% of farms in the County of Brant are under 130 acres, and a wide range of crops are grown making County of Brant farms candidates for high value crops and value-added opportunities.¹
- The Cannabis sector is also identified as an emerging industry which the County has the labour force and land available to support growth.²



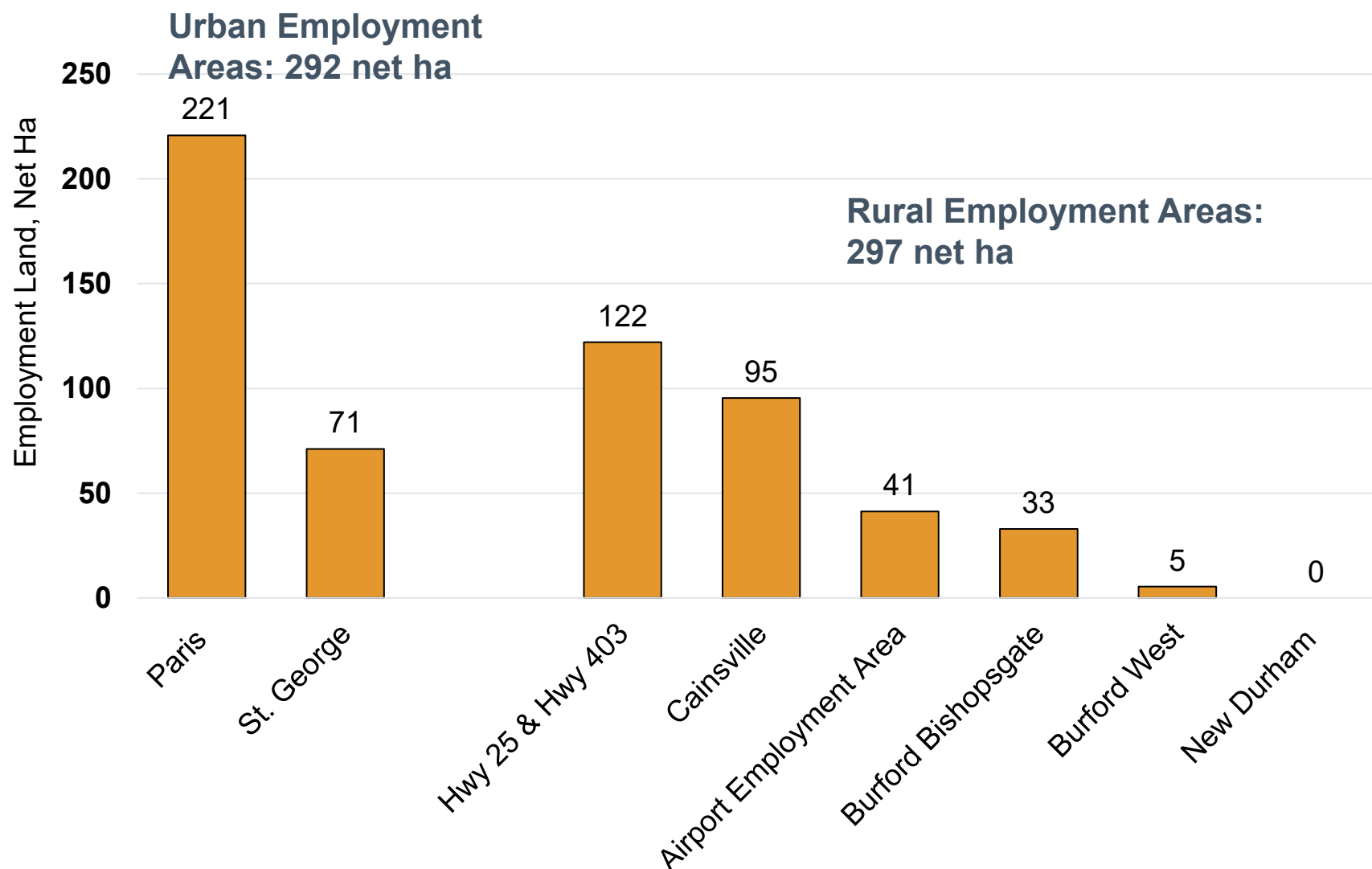
¹ County of Brant Economic Development and Prosperity Discussion Paper, Spring 2020, Watson & Associates Economists Ltd.

² County of Brant Economic Development Strategy & Action Plan, March 2019, McSweeney & Associates.

Employment Area Vacant Land Supply



Overview

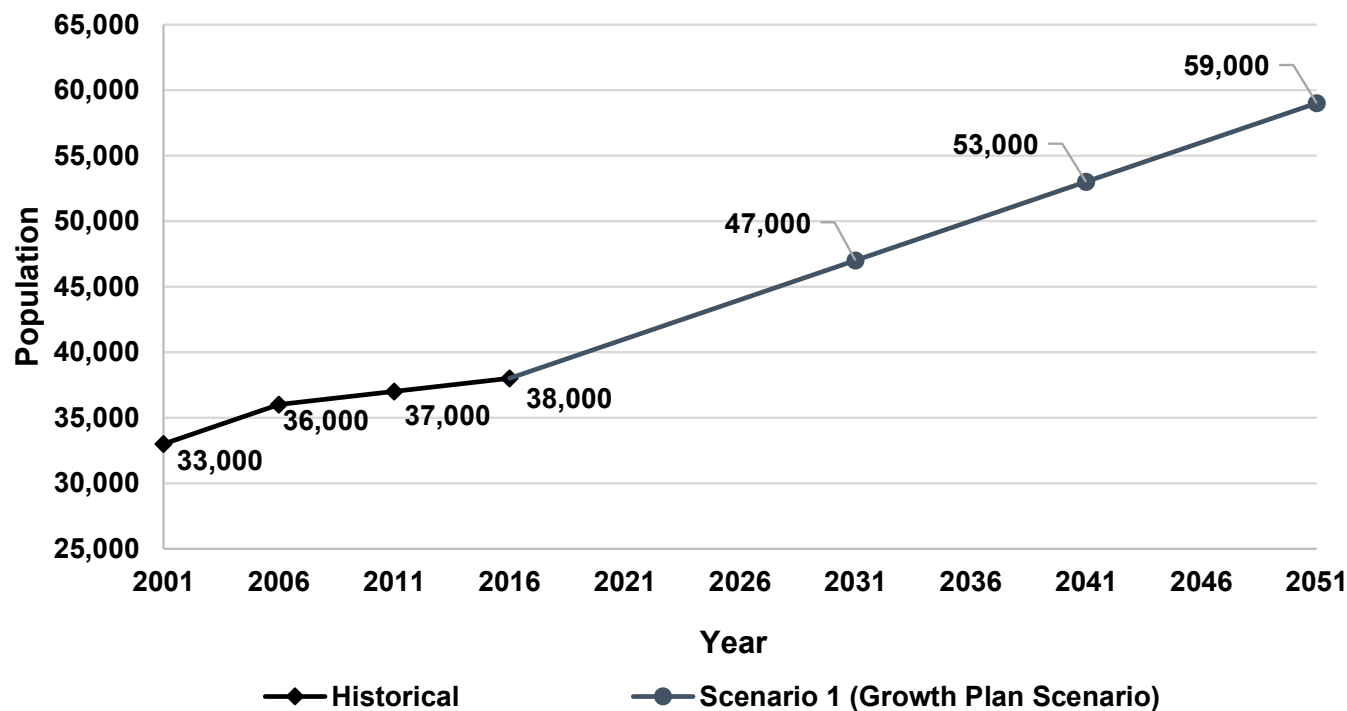


County of Brant Population, Housing and Employment Forecast



County of Brant Growth Forecast to 2051

Population Forecast Comparison for Scenario 1 (Growth Plan Scenario)



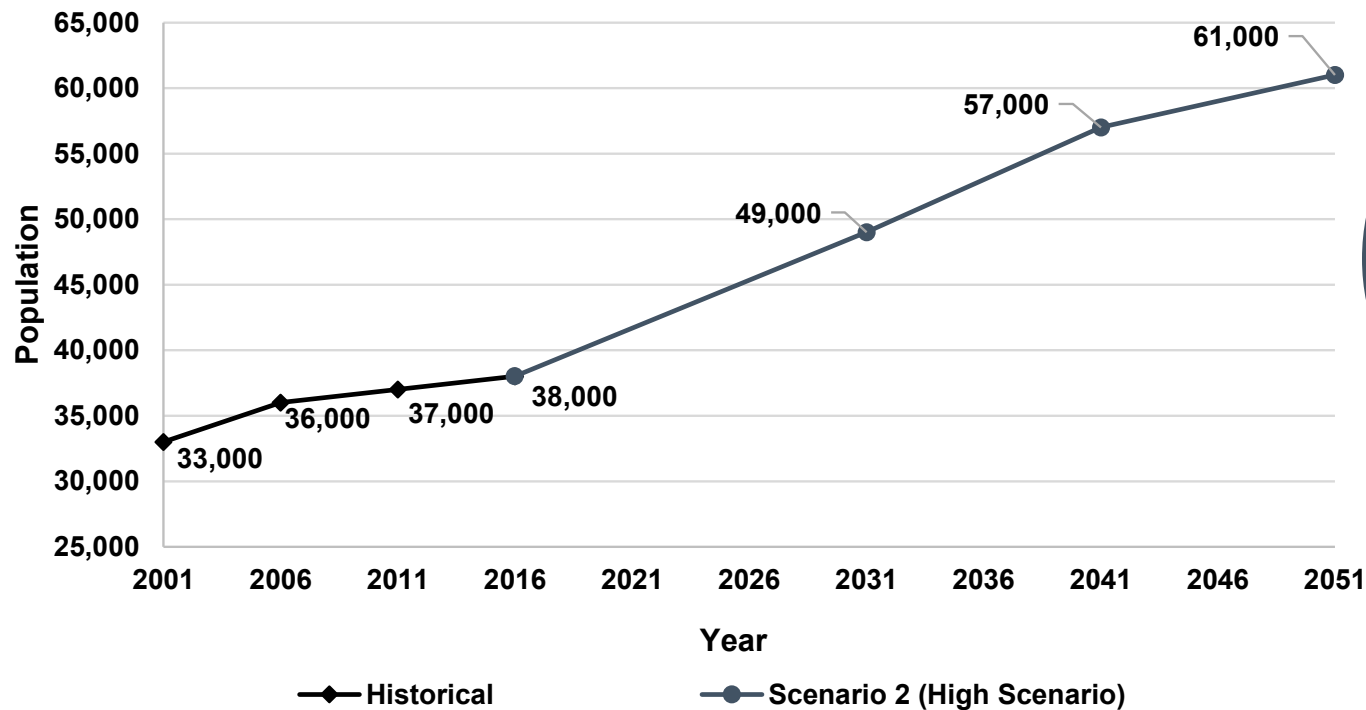
2016 to 2051
Population
Growth:
+21,000

Source: Data from Greater Golden Horseshoe Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., and A Place to Grow, Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020. Figure by Watson & Associates Economists Ltd., 2020.



County of Brant Growth Forecast to 2051

Population Forecast Comparison for Scenario 2 (High Scenario)

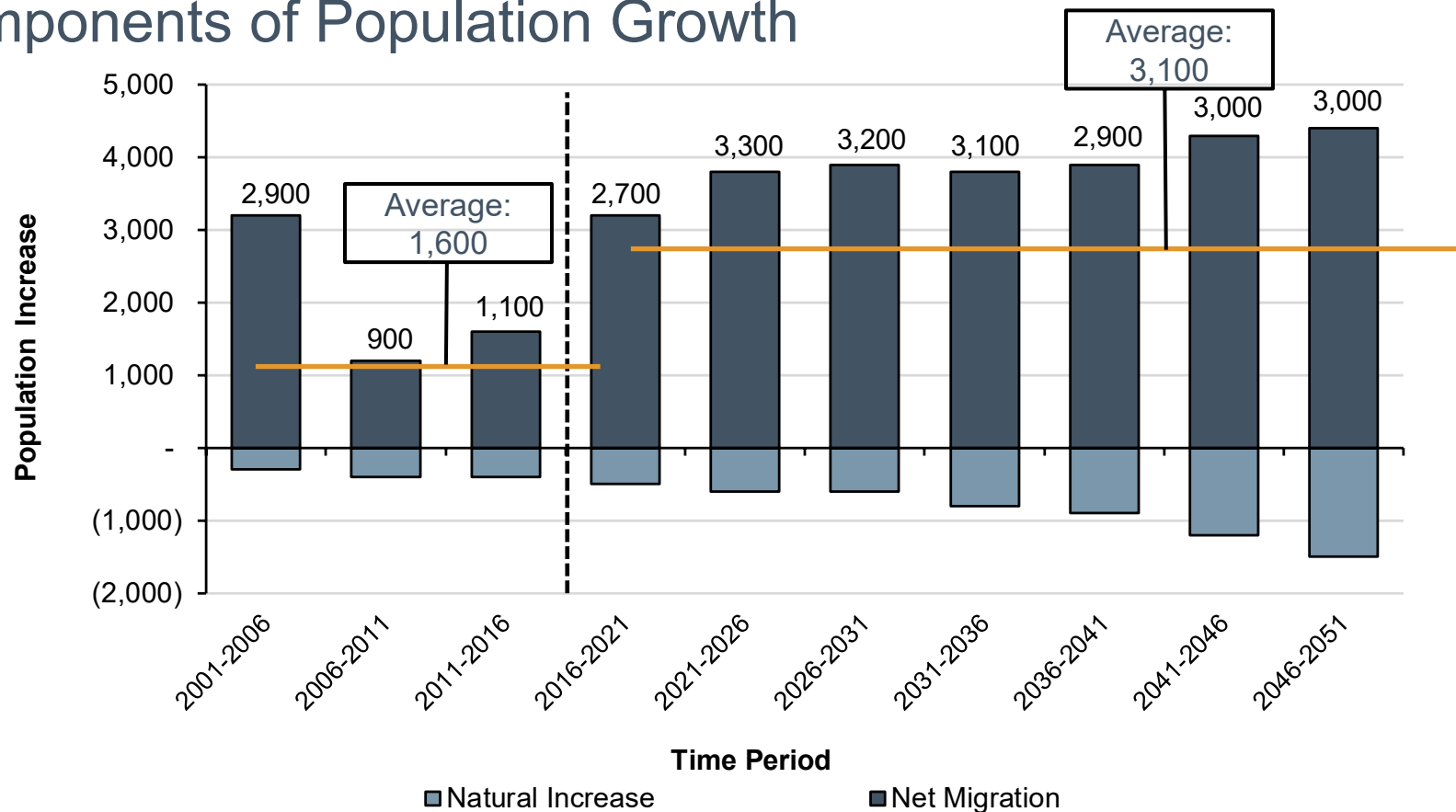


2016 to 2051
Population
Growth:
+23,000

Source: Data from Greater Golden Horseshoe Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., and A Place to Grow, Growth Plan for the Greater Golden Horseshoe, 2019. Figure by Watson & Associates Economists Ltd., 2020.



County of Brant Growth Forecast to 2051 (Scenario 1: Growth Plan Scenario) Components of Population Growth



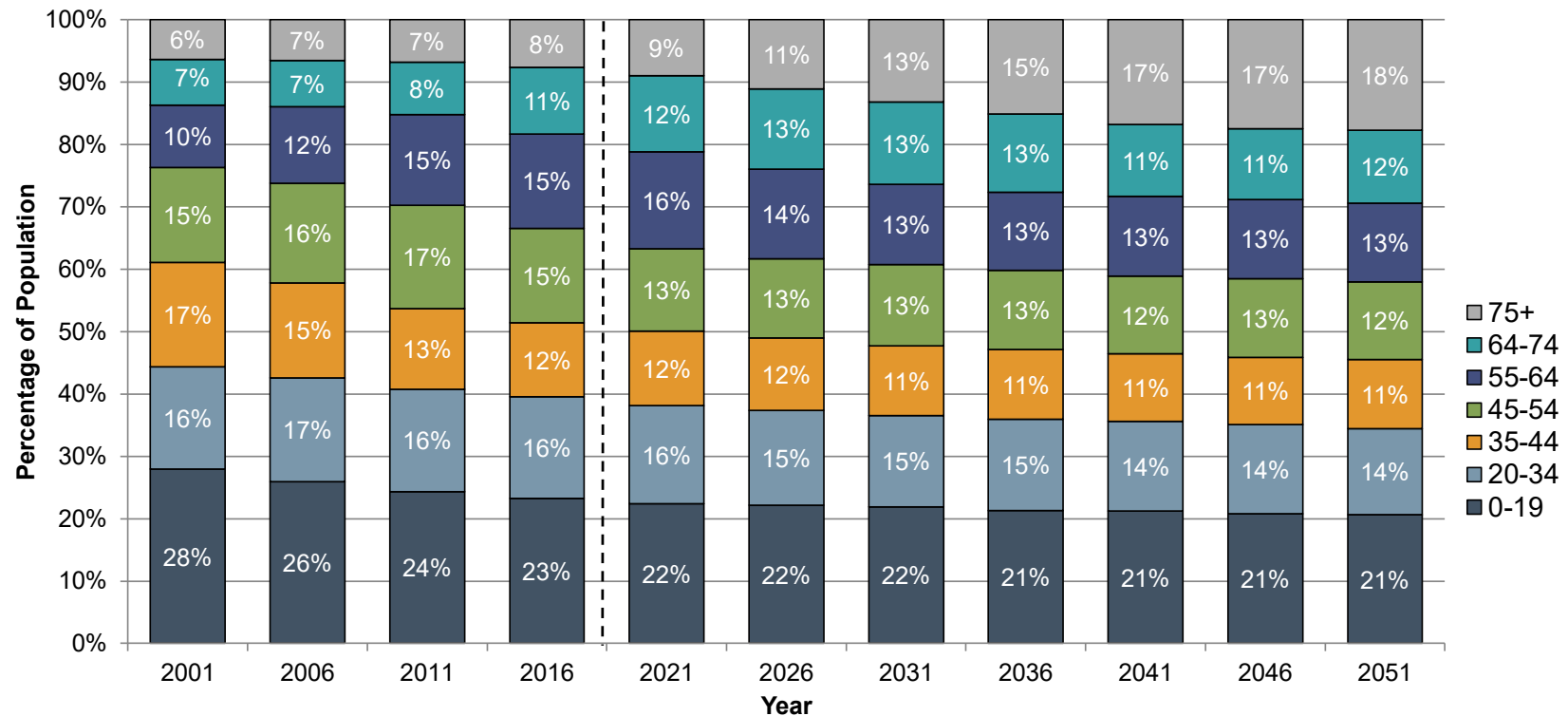
Note: Population includes net Census undercount.

Source: Historical net migration and natural increase derived from Statistics Canada, Demography Division. 2016 to 2051 estimated by Watson & Associates Economists Ltd.

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



County of Brant Growth Forecast to 2051 (Scenario 1: Growth Plan Scenario) Population Age Structure

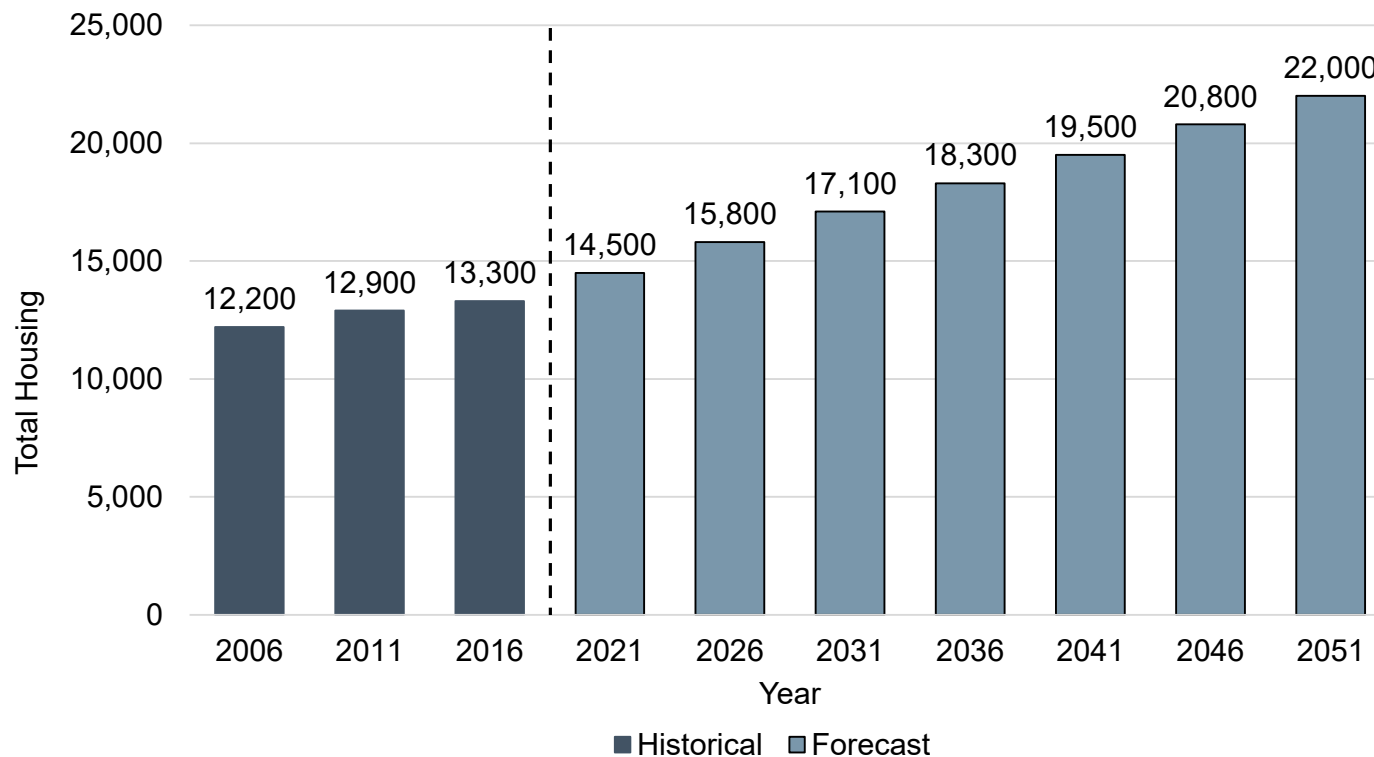


Source: Population forecast by age derived from 2001 to 2016 Statistics Canada census and Annual Demographics Statistics data by Watson & Associates Economists Ltd. 2016 to 2051 population forecast by age prepared by Watson & Associates Economists Ltd., 2020.
Note: Population includes net Census undercount.

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



County of Brant Growth Forecast to 2051 (Scenario 1: Growth Plan Scenario) Total Permanent Housing Forecast

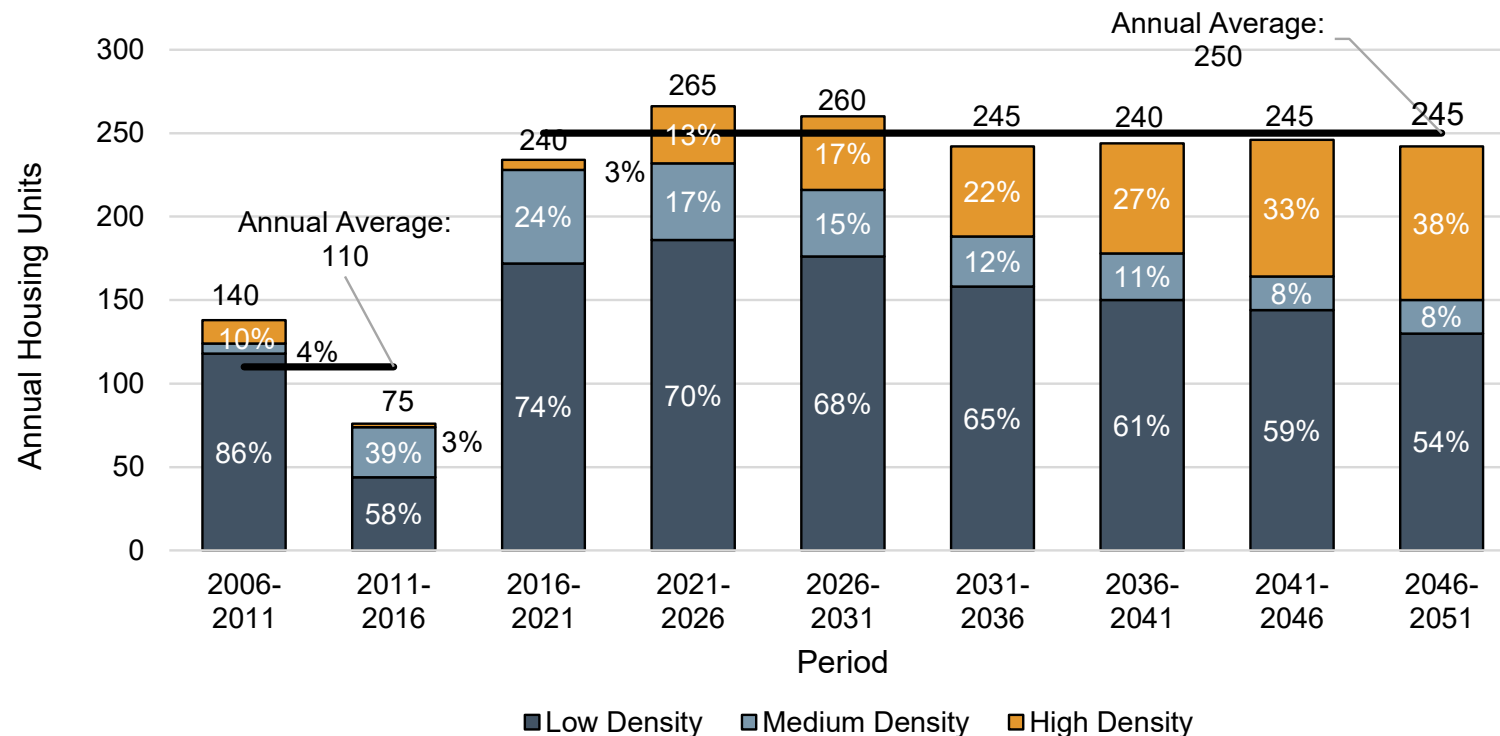


2016 to 2051
Total Housing
Growth:
+8,700

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



County of Brant Growth Forecast to 2051 (Scenario 1: Growth Plan Scenario) Annual Housing Growth, Five-Year Increments



Note:

Low density includes singles and semis.

Medium density includes townhouses and apartments in duplexes.

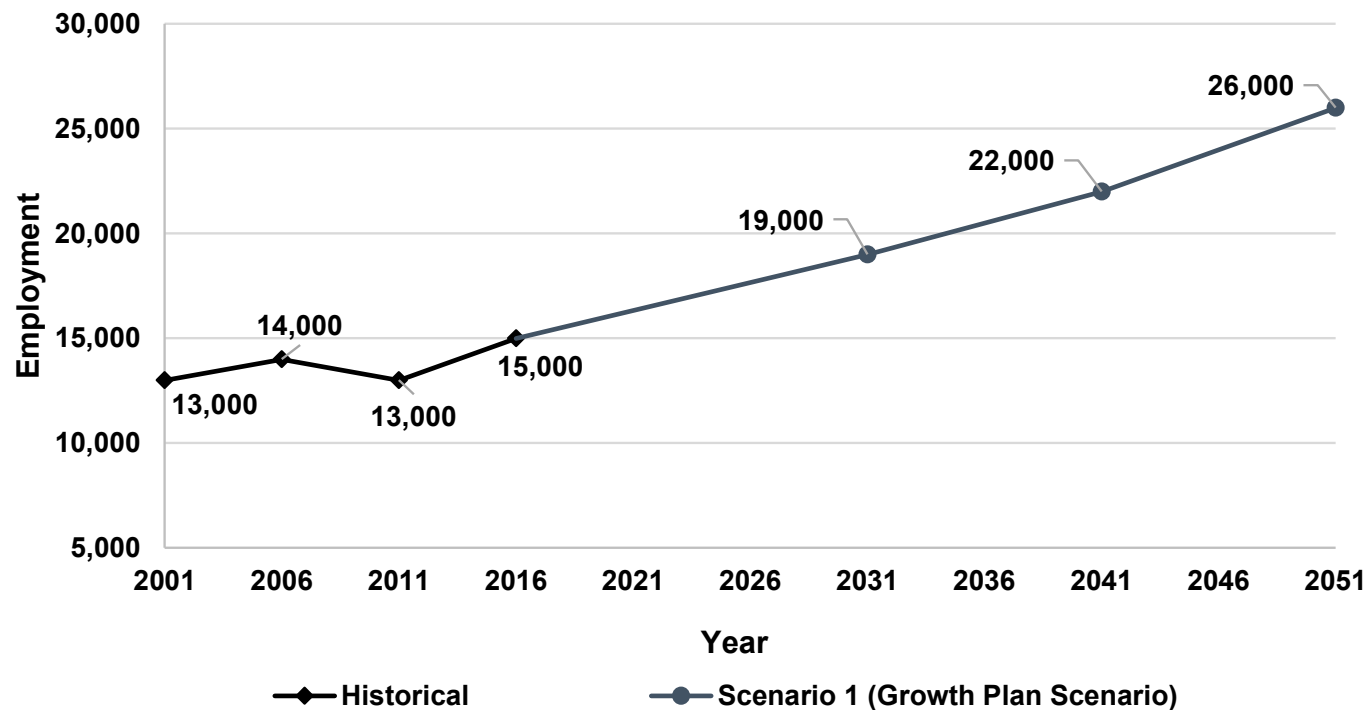
High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: 2006 to 2016 derived from Statistics Canada Census and 2016 to 2041 forecast by Watson & Associates Economists Ltd., 2020.



County of Brant Growth Forecast to 2051

Employment Forecast Comparison for Scenario 1 (Growth Plan Scenario)



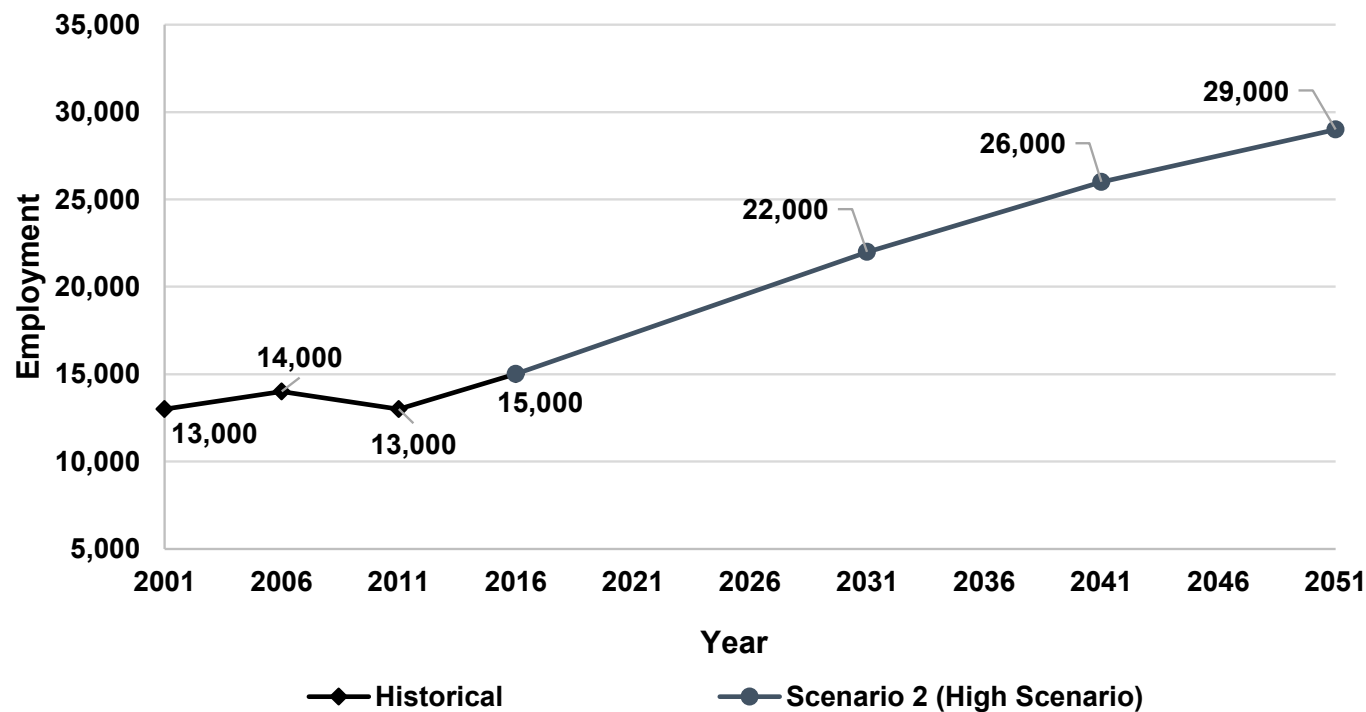
2016 to 2051
Employment
Growth:
+11,000

Source: Data from Greater Golden Horseshoe Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., and A Place to Grow, Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020. Figure by Watson & Associates Economists Ltd., 2020.



County of Brant Growth Forecast to 2051

Employment Forecast Comparison for Scenario 2 (High Scenario)



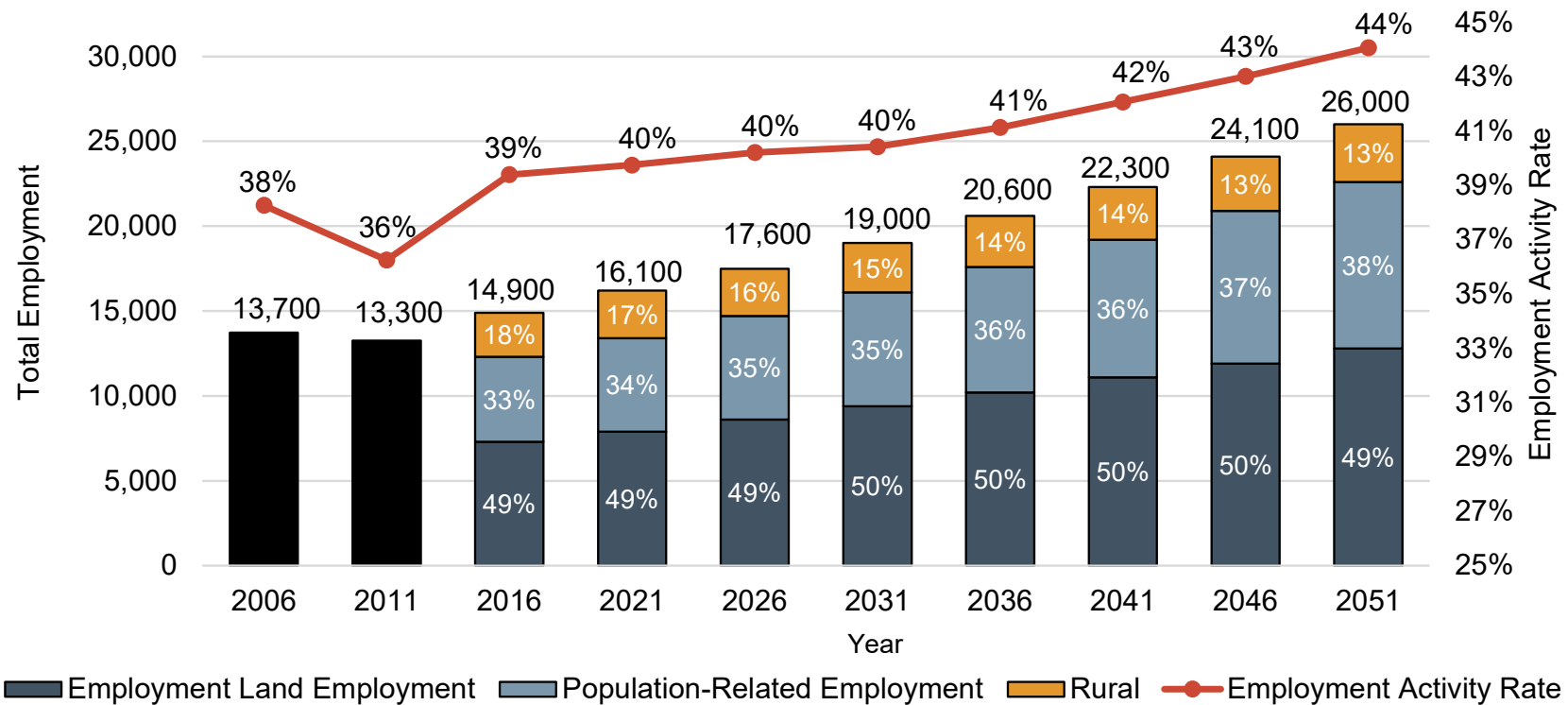
2016 to 2051
Employment
Growth:
+14,000

Source: Data from Greater Golden Horseshoe Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., and A Place to Grow, Growth Plan for the Greater Golden Horseshoe, 2019. Figure by Watson & Associates Economists Ltd., 2020.



County of Brant Growth Forecasts to 2051 (Scenario 1: Growth Plan Scenario)

Total Employment by Type and Employment Activity Rate



Note: Figures have been rounded. Population used to calculate activity rate includes net Census undercount. There is no existing or forecast major office employment.

Source: Watson & Associates Economists Ltd., 2020.

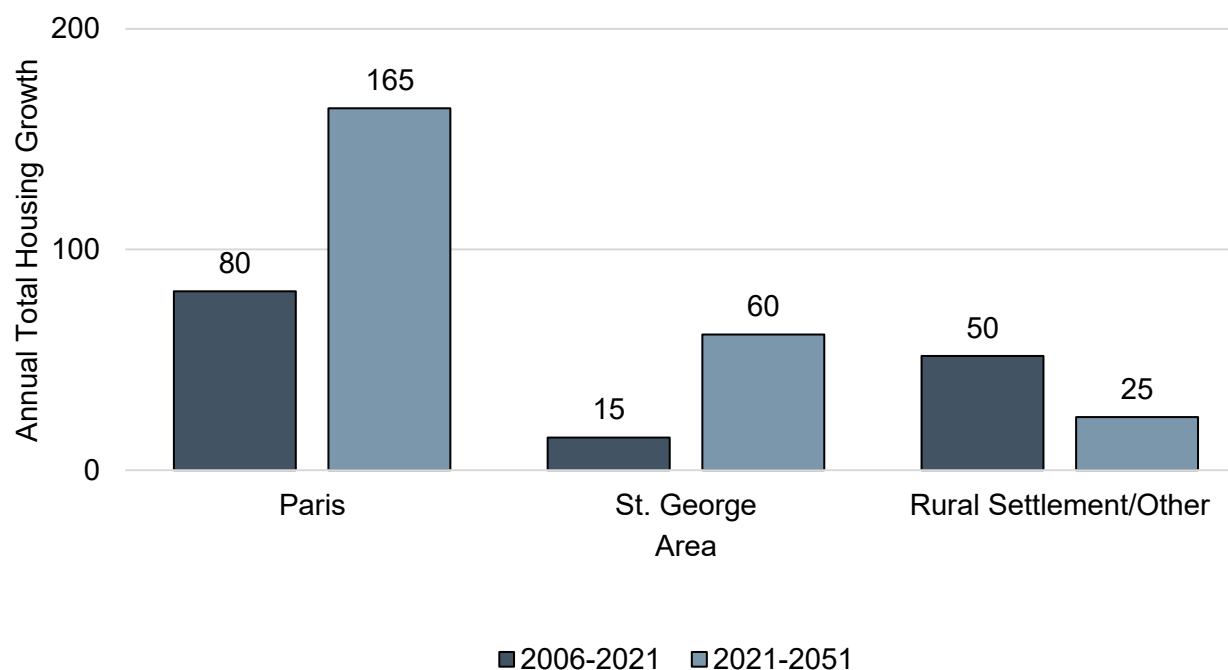


County of Brant Growth Allocations



Housing Growth Allocations to 2051

County of Brant Annual Housing Growth Allocations, 2006 to 2051 by Urban Settlement Area and Remaining Rural Area



Note: Figures have been rounded.

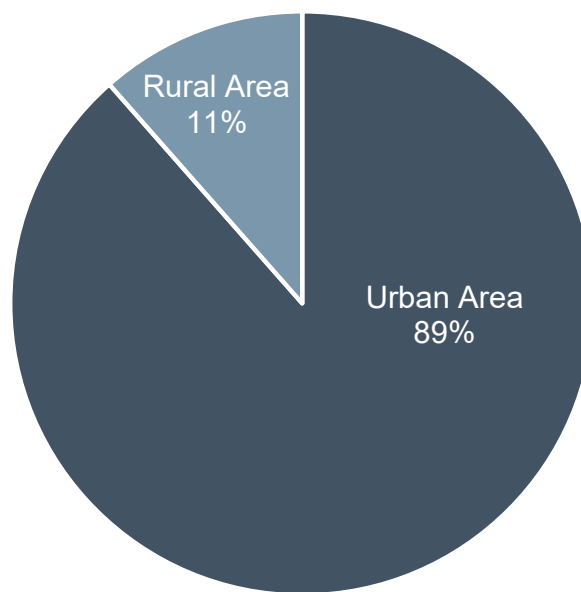
Source: Watson & Associates Economists Ltd., 2020.

Source: Watson & Associates Economists Ltd.



Housing Forecast Allocation to 2051

County of Brant Housing Growth Forecast Allocation By Planning Policy Area, 2016 and 2051



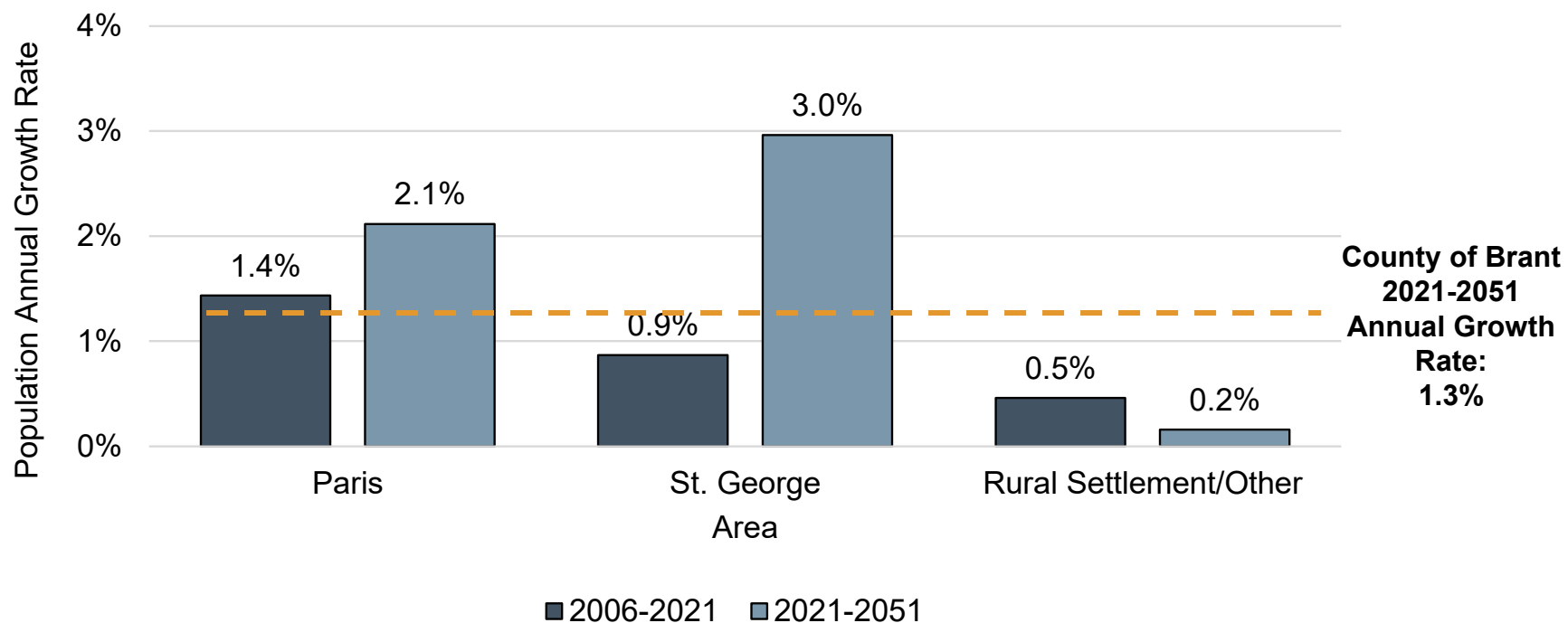
Source: Watson & Associates Economists Ltd., 2020.

Source: Watson & Associates Economists Ltd.



Population Growth Allocation to 2051

County of Brant Population Annual Growth Rates (%) by Urban Area and Remaining Rural Area, 2006 to 2051



Note: Population includes net Census undercount. Figures have been rounded.

Source: Watson & Associates Economists Ltd., 2020.

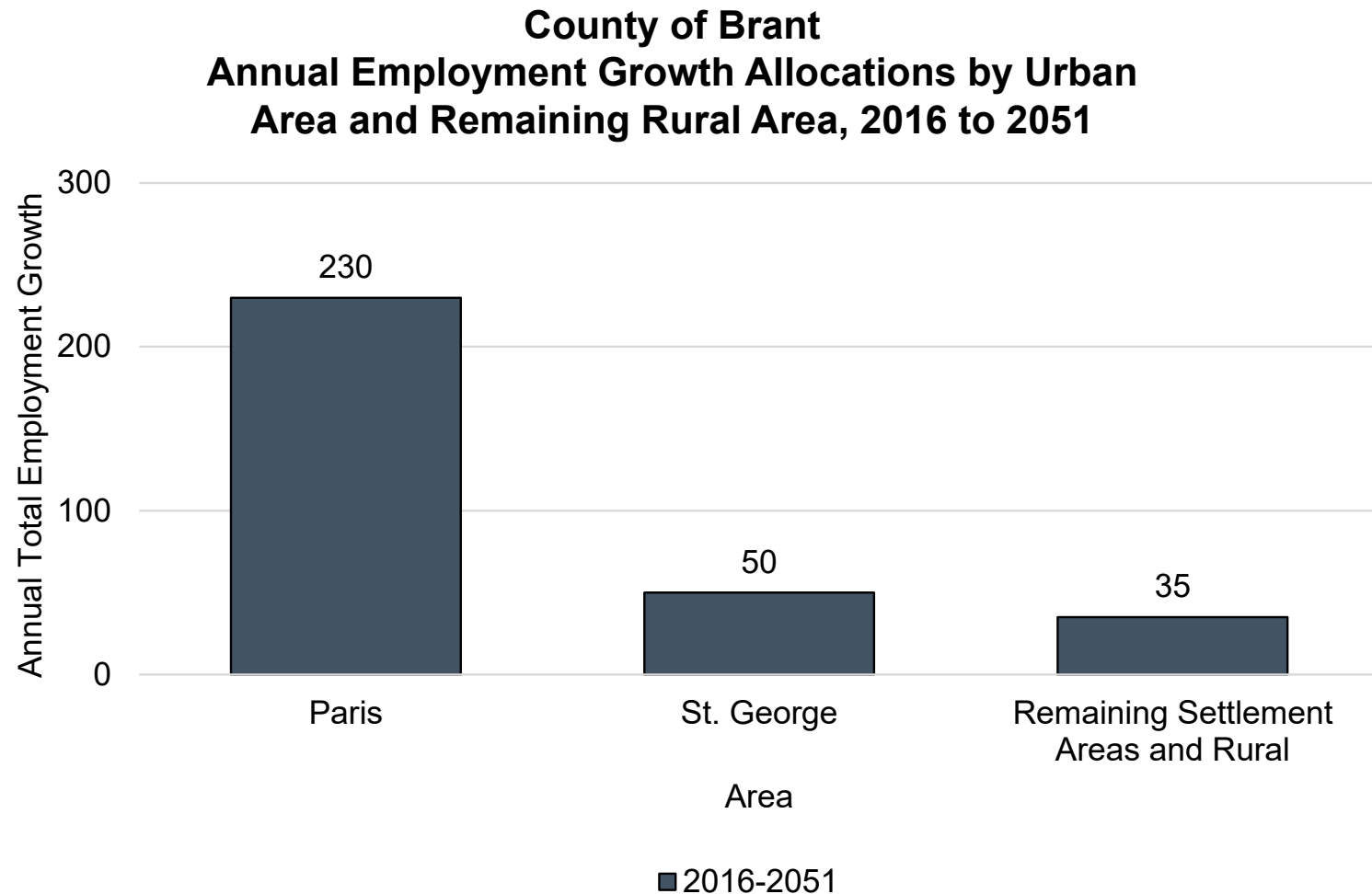
Source: Watson & Associates Economists Ltd.



County of Brant Growth Forecasts

Employment

Employment Growth Allocations to 2051



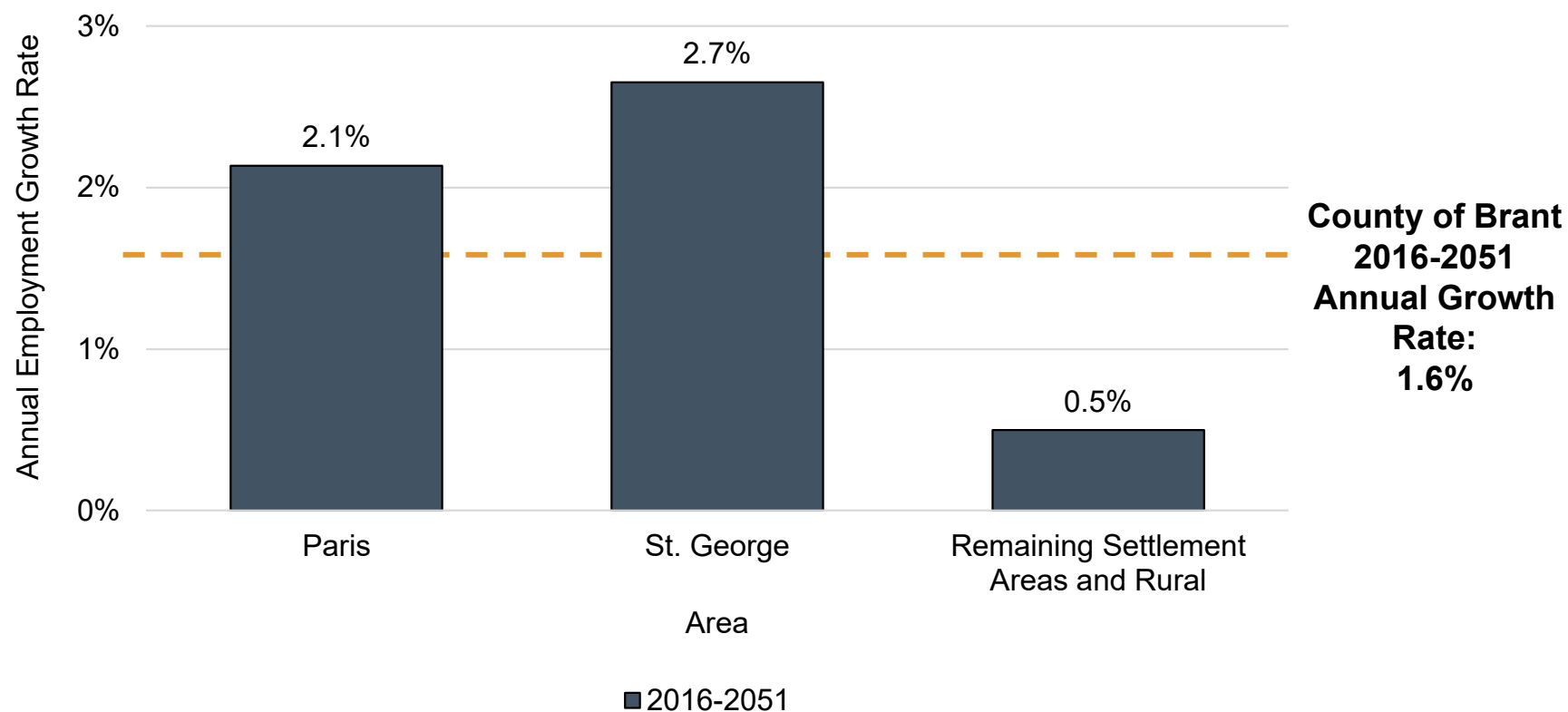
Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd., 2020.



Employment Growth Allocations to 2051

County of Brant Annual Employment Growth Rate by Urban Area and Remaining Rural Area, 2016 to 2051



Source: Watson & Associates Economists Ltd., 2020.

Source: Watson & Associates Economists Ltd.

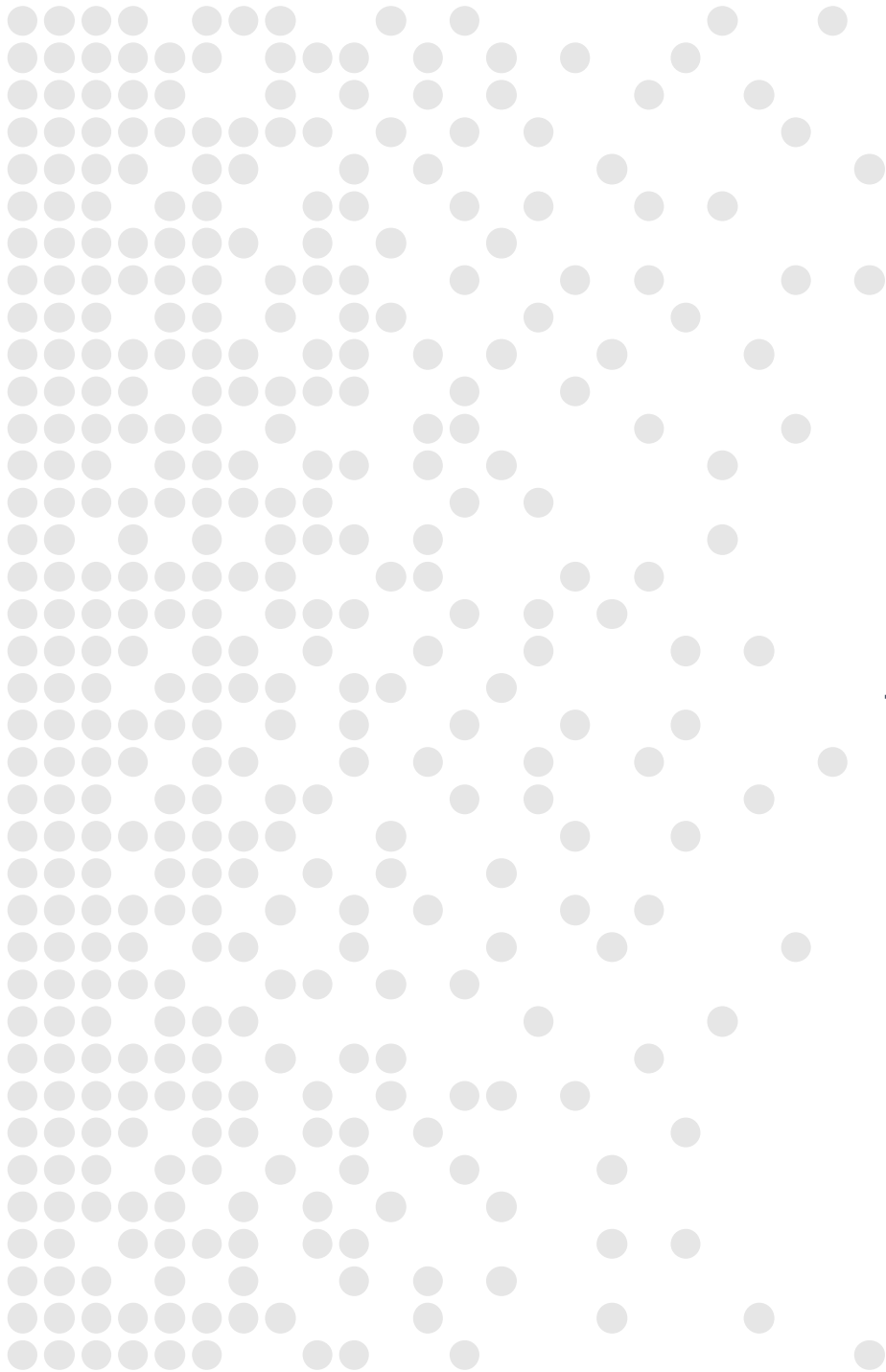


Recommendations

Recommendations



- In accordance with our review of recent development trends and identified growth drivers, Scenario 1 (Growth Plan Scenario) reflects most likely population and employment forecast over the long-term planning horizon (2051).
- It is recommended that the County of Brant proceed with Scenario 1 (Growth Plan Scenario) for the purposes of the new Official Plan.

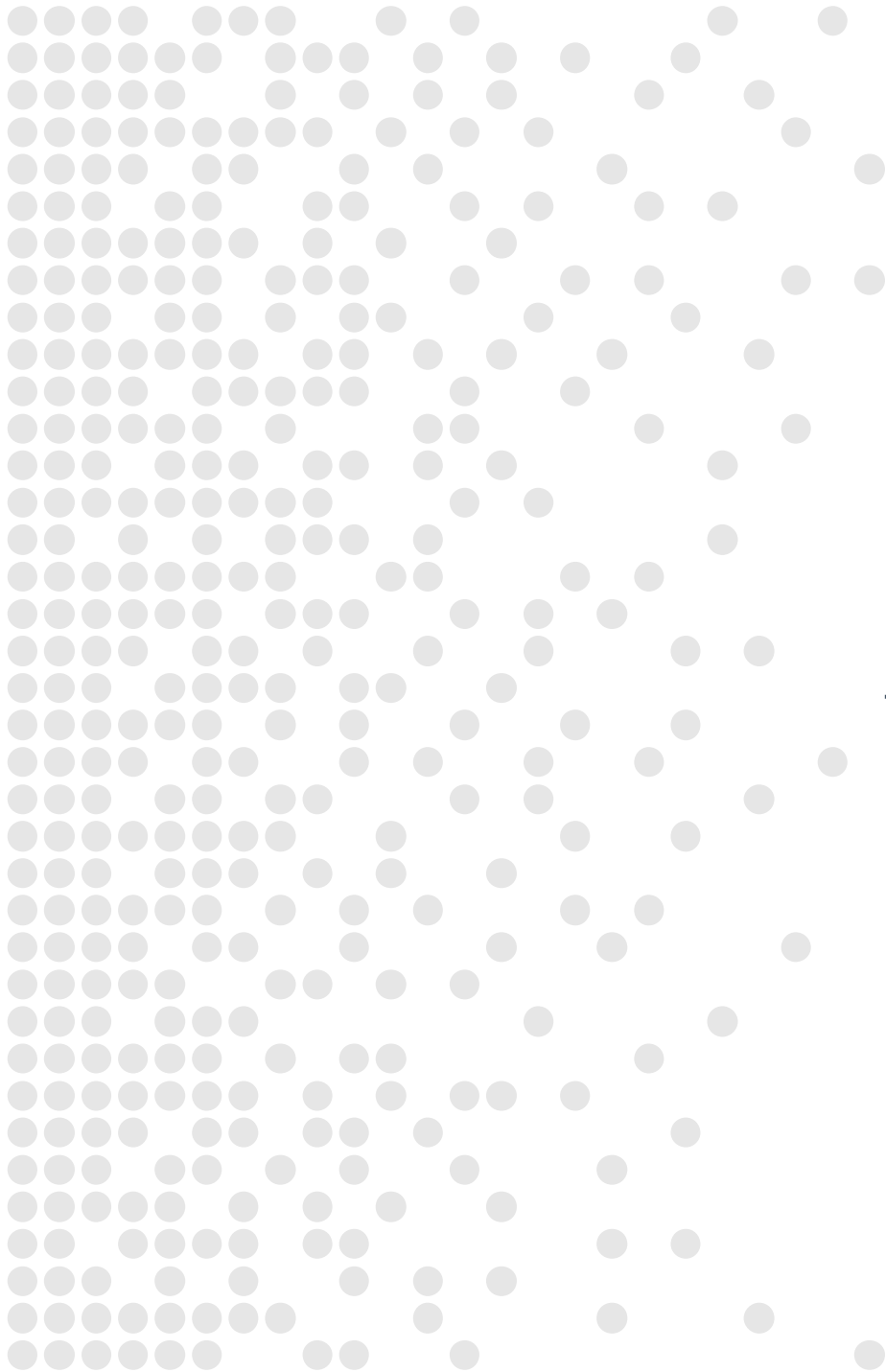


Next Steps



Next Steps

- Finalizing Growth Allocations and Draft Urban Land Needs Assessment – Late December
 - Designated Greenfield Area
 - Urban Employment Area
- Council Meeting and Draft Findings – February 2021
 - Urban Structure; Urban Community Area Land Needs; and Intensification Analysis
- Council Meeting and Draft Findings – March 2021
 - Urban Employment Area Land Needs Analysis and Strategy
- Draft Report – April 2021
- Council Meeting and Final Report – May 2021



Thank You
