



Brant County Council Report

To: To the Mayor and Members of Brant County Council
From: Jennifer Boyer, BES, M.Sc., MCIP RPP, Manager of Policy Planning
Date: December 8, 2020
Report: RPT-20-229
Subject: New Official Plan Municipal Comprehensive Review Preliminary Findings and Recommended Growth Scenario
Purpose: To provide a recommendation on the County of Brant's preferred Growth Forecasting Scenario for the New Official Plan

Recommendation

Whereas the review of recent development trends and identified growth drivers demonstrates that Scenario 1 (Growth Plan Scenario) reflects the most likely population and employment forecast over the long-term planning horizon (2051);

That Scenario 1 (Growth Plan Reference Scenario) be approved as the basis for the Municipal Comprehensive Review of the New County of Brant Official Plan.

THAT 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).

THAT staff be directed to use Scenario 1 (Growth Plan Reference Scenario) to complete the Municipal Comprehensive Review for the purposes of the County's New Official Plan.

AND THAT the growth management option Scenario 1 (Growth Plan Reference Scenario) as described in RPT-20-229 dated December 8, 2020 **BE APPROVED**.

Key Strategic Priorities

1. Sustainable and Managed Growth
2. Healthy, Safe and Engaged Citizens
3. Effective Communications.

Financial Considerations

Completion of the new official plan will be undertaken primarily by County staff, with some portions completed by external consultants, including background technical reports and facilitation of public consultation.

Background

The County of Brant is currently in the process of preparing a new Official Plan (OP). This process represents a Municipal Comprehensive Review (MCR), in accordance with section 26 of the *Planning Act*. A MCR is part of the OP review process which is 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.

Staff presented to Council on October 6, 2020 with RPT-20-156 summarizing the approved changes and the Reference Forecast Scenario for the County of Brant forecasts population to 59,000 people and employment to 26,000 people. Previously, staff presented three long-term growth scenarios for the County's consideration.

The long-term growth scenarios have been comprehensively evaluated in accordance with the long-term growth outlook for the County within the context of regional trends and growth drivers occurring within the broader market area. The preferred growth scenario will form the basis of the new County of Brant OP.

The new OP will provide a Growth Management Strategy (GMS) and Phasing of Development Plan to guide development and land needs to the year 2051. Over this period, the County of Brant is projected to grow by an additional 19,000 people. The strategy and policy framework to accommodate growth is to be established by the new OP policy directions. The County's new OP and the accommodation of growth must be consistent with the Provincial Policy Statement (PPS), 2020 and Growth Plan, 2019 (as amended) to ensure land needs.

Report

The purpose of this report is as follows:

1. 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.
2. To recommend a "preferred" long-range population, housing and employment growth scenario for the County.
3. 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.

Growth Plan Forecasts Represent Minimums

Amendment 1 to A Place to Grow: Growth Plan for the Greater Golden Horseshoe (GGH) is now in effect as of August 28, 2020. Municipalities are now required to use the growth forecast in Schedule 3 of the Growth Plan, 2019 as the updated forecasts or use higher forecasts as determined through their MCR process to meet the conformity deadline of July 1, 2022.

Population Forecasting forms the starting point for projecting housing need and related land needs. Municipalities may use Schedule 3 Forecasts or an alternate growth scenario.

Providing an appropriate growth forecasts is Component 1 of the Land Needs Assessment and a critical first step in determining long-term land needs.

New Plan Horizon Year

The current planning horizon of the County of Brant OP is 2031. The Plan horizon of the Growth Plan, 2019 (as amended) has been extended to 2051 to ensure municipalities have sufficient land to support the fostering of complete communities, economic development, job creation and housing affordability. The new planning horizon better aligns with the land supply requirements of the PPS, 2020.

Policy Objectives

The PPS, 2020 provides policy direction on matters of provincial interest related to land use planning and development. As a key part of Ontario's policy-led planning system, the PPS, 2020 sets the policy foundation for regulating the development and use of land. The PPS, 2020 requires that municipalities:

- provide a minimum residential supply that has an appropriate range and mix of **housing options** and densities to meet projected market-based and affordable housing needs of the regional market area; and
- look to opportunities to satisfy market demand through intensification, redevelopment and already designated areas first, locating growth to efficiently use existing infrastructure, reducing greenhouse gas emissions and improving air quality.

The Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. This document was updated in late August to include Amendment 1. Amendment 1 included some policy changes and updated growth forecasts. The Growth Plan, 2019 sets out where and how growth will occur across the GGH to 2051 and all planning decisions are required to conform to it.

In conjunction with the Growth Plan, 2019, the province released an updated methodology for land needs assessment (LNA). Upper- and single-tier municipalities in the GGH are required to use this methodology to assess the quantity of land required to accommodate forecast growth in conformity with the policies in the Growth Plan, 2019. The overall policy objectives of the Growth Plan, 2019 and PPS, 2020 for the County of Brant are as follows:

- Intensification Targets – minimum 15%
- Density Targets – 40 people and jobs per hectare (Designated Greenfield Area)
- Land Supply: 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; and maintain at all times the ability to accommodate residential growth for a minimum of 15 years through residential intensification and redevelopment.
- Planning for Infrastructure: 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.

Land Needs Assessment Technical Review

- In accordance with the growth objective and targets provided by the Province of Ontario as well as the technical and strategic analysis provided through the MCR, the County of Brant will determine how to manage growth in a manner that suits the County. Critical to this goal is a long-term GMS which accommodates growth and change in a manner which preserves the County's livability while embracing sustainable development patterns.
- The Lands Needs Assessment (LNA) represents a core aspect of the MCR. It involves a land budget exercise informed by the long-term population and employment forecast to the County to the year 2051.
- The results of this technical exercise can only be implemented through the new County of Brant OP and must conform to the policies of the Growth Plan, 2019.
- The Provincial Land Needs Assessment Methodology (LNA) for the GGH was updated on August 28, 2020 in accordance with Amendment 1 to the Growth Plan, 2019. The revised LNA for the GGH reflects a more outcome-based methodology compared to the previous LNA for the GGH released by the Province in 2018.
- LNA for the GGH provides key components to be completed as municipalities plan to ensure that sufficient land is available to: accommodate all housing market segments; avoid housing shortages; consider market demand; accommodate all employment types including those that are evolving; and plan for all infrastructure that is needed to meet the complete communities objectives to the horizon of the Growth Plan.¹
- The Growth Plan, 2019 and PPS, 2020 identify two types of settlement areas: urban areas and rural settlement areas. In accordance with these Provincial documents, growth is directed to urban areas on full municipal services.
- For the County of Brant, Paris and St. George represent the County's urban areas in accordance with the Growth Plan, 2019.
- As identified in the LNA for the GGH, land needs within urban areas are to be considered by two types of geographies:
 - **Community Areas** – Areas where most of the housing required to accommodate population, as well as population-related jobs and most office jobs will be located.

¹ A Place to Grow. Growth Plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Pg. 4

- **Employment Areas** – Areas where most of the employment land employment jobs (employment in industrial-type buildings), as well as some office and population-related jobs are located.²
- A draft assessment of long-term urban land needs for the County of Brant will be presented to County of Brant Council in February 2021.

Preliminary Findings of the Municipal Comprehensive Review – Population and Employment Growth

The County of Brant is on track to achieve its OP 2031 population and employment target of 47,000 people and 19,000 jobs by 2031. By 2051, the County of Brant population and employment base is forecast to reach 59,000 people and 26,000 jobs. This represents a total population and employment increase of 21,000 and 11,000 respectively between 2016 and 2051.³

Regional Growth Context

It is important to recognize that future population and employment growth within the County of Brant is strongly correlated with the growth outlook and competitiveness of the local and regional economy. Employment opportunities within the County of Brant and surrounding commuter-shed represent the primary driver of net migration and economic development to this area.

A key driver of the County of Brant's future population and economic growth potential is its geographic location within Central Ontario. The County of Brant is located in the southwest of one of the fastest growing Cities/Regions in North America, referred to as the Greater Golden Horseshoe (GGH). This region comprises the municipalities that make up the Greater Toronto 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.

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.

² Ibid. Pg. 7

³ All population figures reported herein are upwardly adjusted by approximately 3% to account for the net Census under-coverage. The net Census under-coverage represents the net number of people who are estimated to be missed during Census enumeration.

As identified in the Growth Plan, 2019, the long-term outlook for the GGH is very positive, characterized by strong population and employment growth, which is concentrated in the region's large urban regions. 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 by 2051. This represents a population increase of approximately 5.4 million persons, or 155,000 persons per year. With respect to employment, the GGH is forecast to increase from 4.6 million employees in 2016 to 7 million by 2051, an increase of 2.4 million employees, or 70,000 employees per year. This represents a substantial increase in population and employment relative to other North American metropolitan regions of comparable population.

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, 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.

The magnitude and distribution of growth throughout the GGH is of key significance to the County of Brant. More specifically, as remaining greenfield areas of the more mature areas of the GTHA continue to build out and housing prices steadily rise, increasing outward growth pressure will be placed on the outlying municipalities of the GGH "Outer Ring," and beyond. In turn, population growth across a broad range of demographic groups will 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 of Brant local employment base is also forecast to increase, generating new live/work opportunities. Strong regional and local economic growth potential represents the primary driver of forecast net migration to the County of Brant, which, in turn, continues to drive local housing demand. Over the long-term planning horizon, housing demand across the County is anticipated across a broad range of housing typologies, required to accommodate existing and new residents of varying ages and income levels.

As a result of this continued GTHA outward growth pressure, the population and employment base in the County of Brant is anticipated to grow much faster over the next several decades relative to growth levels experienced over the past two decades. Figure 1 summarizes the population and employment forecast from 2016 to 2051 for the GGH Outer Ring and the County of Brant, relative to historical trends. Key observations include:

- Annual population and employment growth across the GGH Outer Ring is anticipated to be significantly stronger over the next 35 years in comparison to the past 15 years;
- For the County of Brant, the amount of annual population growth achieved between 2001 and 2016 is anticipated to double over the long-term forecast period. This represents an annual population growth rate of 1.3% from 2016 to 2051, compared to 0.9% from 2001 to 2016;
- Forecast annual employment growth for the County of Brant over the long-term planning horizon is forecast to triple relative to the 2001 to 2016 period. This

represents an annual employment growth rate of 1.6% from 2016 to 2051, compared to 1.0% from 2001 to 2016.

- The County of Brant employment base is forecast to grow at a faster rate relative to the GGH Outer Ring as a whole. As such, the share of total GGH Outer Ring jobs located within the County of Brant is forecast to increase over the long-term planning horizon.

Figure 1

County of Brant and GGH Outer Ring Population and Employment Growth Forecast, 2016 to 2051

Area	Population			2001 to 2016			2016 to 2051		
	2001	2016	2051	Total Population Growth	Annual Population Growth	Annual Population Growth Rate	Total Population Growth	Annual Population Growth	Annual Population Growth Rate
Brant County	33,000	38,000	59,000	5,000	300	0.9%	21,000	600	1.3%
G.G.H. Outer Ring	1,971,000	2,289,000	3,703,000	318,000	21,200	1.0%	1,414,000	40,400	1.4%

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

Note: Population includes the net Census undercount.

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
Brant County	13,000	15,000	26,000	2,000	100	1.0%	11,000	300	1.6%
G.G.H. Outer Ring	863,000	1,008,000	1,648,000	145,000	9,700	1.0%	640,000	18,300	1.4%

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

Forecast Population and Housing Trends for the County of Brant, 2016 to 2051

The following key findings have been identified through the County of Brant MCR regarding long-term population and housing trends:

- 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.
- 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.
- Across the County, housing preferences by structure type are anticipated to gradually shift from low-density to medium-density and high-density housing forms over the long term. This shift will largely be driven by the aging of the County’s population base and rising housing prices relative to household income. It is further noted that to adequately accommodate future housing demand across an increasingly diverse population base, a broader range of new housing typologies by built-form, tenure and affordability will be required across the County’s urban areas.

- Between 2016 and 2051, the following mix of new housing by structure type is forecast for the County of Brant:
 - Low-density (single and semi-detached): 64%
 - Medium-density (townhomes, duplexes): 14%
 - High-density (apartments): 22%
- The number of residential building permits issued for new dwellings between 2018 and 2020 has been noticeably higher relative to comparable building permits issued over the past decade.
- Active development applications in registered unbuilt, draft approved and proposed plans indicate near-term and longer-term housing demand will be strong.

Employment Trends and Long-Term Forecasts by Sector and Employment Type, 2016 to 2051

- The existing employment base with the County of Brant can be largely categorized into the following major sectors: manufacturing, construction, retail trade, health care/social assistance and transportation and warehousing, wholesale trade and agriculture.
- Looking forward, employment growth is anticipated to be particularly strong for small to medium-scale businesses that are focused on innovation, entrepreneurship, and technology.
- Knowledge-based and creative-class sectors such as: professional, scientific, and technical services, financial services, information and cultural industries, education services, health care and social services, tourism and advanced manufacturing are anticipated to represent key economic growth sectors of the regional and local economy.
- For long-term planning purposes, employment with the County of Brant can be broken down into three primary categories, including:
 - **Employment Lands Employment (ELE):** Represents jobs accommodated in industrial-type buildings within the Region's urban and settlement areas with the majority of employment located within Employment Areas. This encompasses largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction and utilities. ELE includes population-related employment (PRE) associated with office commercial and employment-supportive uses accommodated within industrial-type buildings.
 - **Population-Related Employment (PRE):** Includes employment in institutional and commercial sectors not accommodated within industrial buildings (ELE). This employment category is largely driven by population growth, tourism and local trade. Work at home employment is also captured as PRE. PRE is located within the County's urban and settlement areas and largely accommodated in downtown areas, commercial corridors and nodes, neighbourhood plazas,

institutional campuses and schools, and standalone institutional and retail buildings. A limited share of PRE is accommodated in Employment Areas within standalone institutional and retail commercial buildings.

- **Rural Employment:** Rural-based employment reflects jobs accommodated in locations outside the County’s urban and settlement areas. Rural Employment consists primarily of primary sectors (e.g. agriculture, mineral aggregate extraction) as well as dry industrial uses located in rural Employment Areas.
- The forecast mix of employment for the County of Brant over the 2016 to 2051 forecast period is as follows:
 - ELE: 50%
 - PRE: 44%
 - Rural: 6%
- As previously discussed, the MCR will consider the need for additional urban land to accommodate forecast growth associated ELE and PRE.

Planning for Employment Areas

- Employment Areas include clusters of industrial or “export-based” uses associated with the ELE category. Employment Areas are to be protected from “sensitive” uses, such as residential and major retail.

County of Brant Long-Term Growth Scenarios

Scenario 1 – Reference Forecast (Growth Plan)

- Under the Reference Scenario, the 2031 population and employment forecast is consistent with the County of Brant OP at 47,000 people and 19,000 jobs; and
- By 2051, the County of Brant population and employment base is forecast to reach 59,000 people and 26,000 jobs under the Reference Scenario.

Scenario 2 - High Scenario

- Under the High Scenario, the population and employment base is forecast to grow faster than the Brant OP. By 2031, the County’s population and employment base is forecast to reach 49,000 people and 22,000 jobs; and
- By 2051, the County of Brant population and employment base is forecast to reach 61,000 people and 29,000 jobs under the High Scenario.

Preferred Long-Range County-wide Growth Scenario (Scenario 1 – Growth Plan)

Scenario 1 - Growth Plan, represents the preferred long-term growth scenario for the County of Brant. This scenario:

- Represents a reasonable increase in long-term population and employment growth relative to historical trends;
- Accurately identifies the anticipated influence of identified regional and local growth drives on future development trends across the County; and
- Represents an increasing share of annual population, housing and employment growth for the County of Brant relative to the total GGH over the 2016 to 2051 forecast period.

Growth Allocation by Urban and Rural Area (Scenario 1 - Growth Plan)

The long-term population, housing and employment forecast associated with the preferred long-term growth Scenario (Scenario 1 – Growth Plan) has been allocated by urban area (i.e. Paris and St. George) and remaining rural area. Within each urban area the population and household forecast has been further allocated by Planning Policy Area, including the built-up area (BUA), designated greenfield area (DGA) and rural area. Key observations include:

- It is anticipated that an increasing share of the population and employment base within the County of Brant will be accommodated in urban areas. As of 2016, 42% of the County of Brant residents live within Paris and St. George, while the remaining 58% live in rural settlement areas and the remaining rural area. By 2051, it is forecast that 60% of the County of Brant population will live in urban areas.
- Between 2016 and 2051, the share of the County-wide population forecast has been allocated as follows:
 - Paris – 68%;
 - St. George - 24%; and
 - Rural settlement areas and remaining rural areas – 9%.
- Between 2016 and 2051, the share of the County-wide employment forecast has been allocated as follows:
 - Paris – 73%;
 - St. George - 16%; and
 - Rural settlement areas and remaining rural areas – 11%.
- Between 2022 and 2051, a minimum annual residential intensification target of 20% is recommended.

New Official Plan Policy Directions

County staff are moving ahead with completing the draft MCR based on the above-referenced growth forecasting assumptions and key findings. The date by which municipalities must conform to the policies in A Place to Grow still remains July 1, 2022, and the Province has confirmed there will be no extension to this date.

The results LNA will need to be reviewed by Provincial staff before incorporating the outcomes of this work into the MCR. This will ultimately assist staff with streamlining decision-making and policy recommendations which will inform the County's new OP.

Updates to Master Plans

The New Official Plan, coordination of public engagement and technical background studies of the Municipal Comprehensive Review are being fully coordinated with other County departments for their input and analysis. The proposed amendment to the Provincial Growth Plan Forecasting affects other departments and their objectives in Corporate Services, Operations and Finance.

The Transportation Master Plan (TMP), currently underway and scheduled for completion in early 2022, will include a review and analysis of the County's future transportation needs based on the adopted growth scenario in the new Official Plan. Based on that analysis, plans for the future road, walking, and cycling networks will be refined as needed and presented to Council for approval along with any required amendment to the new Official Plan.

The New Official Plan and Growth Forecasting Scenario is also being coordinated with infrastructure master plans such as the Master Servicing Plans for Paris, Burford, St. George, and Cainsville.

Next Steps

Finalizing Growth Allocations and Draft Urban Land Needs Assessment – January 2021

- 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

Special Meeting of Council and Final Report – May 2021

Report by: Jennifer Boyer, BES, M.Sc., MCIP RPP, Manager of Policy Planning

Reviewed and

Submitted by: Pam Duesling, MAES, MCIP, RPP, Ec.D., CMM3, General Manager of Development Services

Attachments

1. County of Brant MCR – Population, Housing and Employment Growth Forecast Allocations, Nov. 2020
2. Presentation Slide Deck – County of Brant Municipal Comprehensive Review Preliminary Findings
3. Official Plan Work Plan & Schedule v.7 December 2020

Copy to

1. Heather Boyd, Director of Council Services, Clerk
2. Senior Management Team
3. Mark Eby, Director of Infrastructure
4. Mat Vaughan, Director of Development Planning
5. Alyssa Seitz, Planning Administrative Assistant

In adopting this report, is a bylaw or agreement required?

By-law required (No)
Agreement(s) or other documents to be signed by Mayor and /or Clerk (No)
Is the necessary by-law or agreement being sent concurrently to Council? (No)