



Addendum to the Municipal Comprehensive Review

County of Brant

Final Report

May 2023

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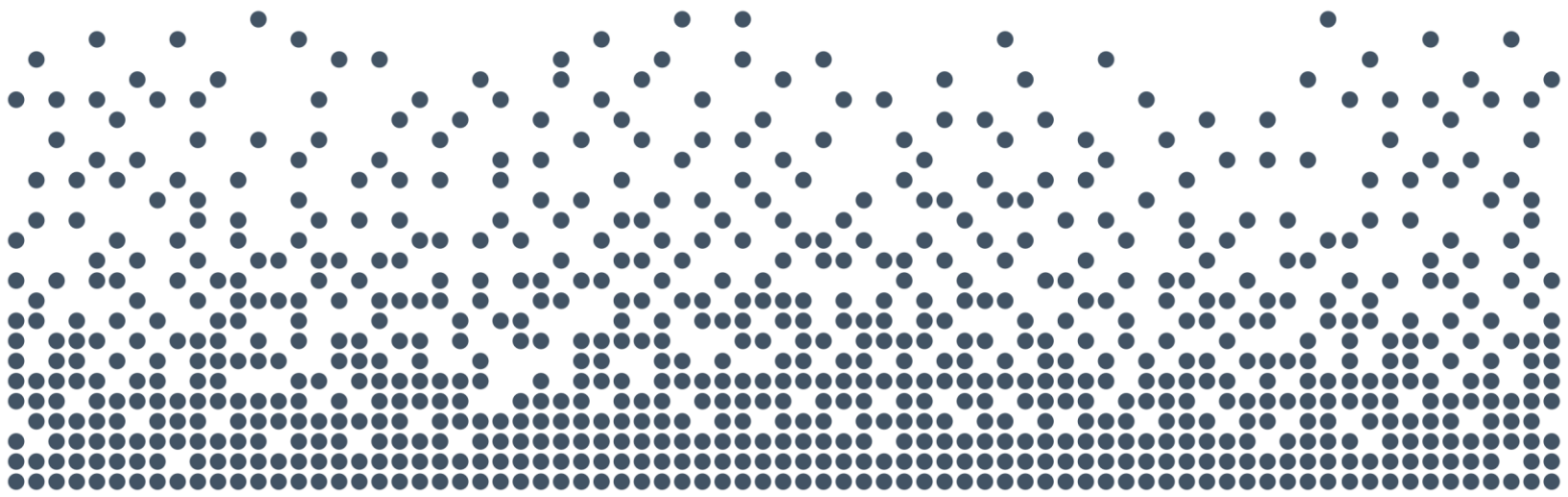
List of Acronyms and Abbreviations

A.I.A.	Agriculture Impact Assessment
A.P.T.G.	A Place to Grow
A.R.U.	Additional Residential Unit
B.U.A.	Built-up Area
D.G.A.	Designated Greenfield Area
E.L.E.	Employment Lands Employment
G.D.P.	Gross Domestic Product
G.F.A.	Gross Floor Area
G.G.H.	Greater Golden Horseshoe
G.L.A.	Gross Leasable Area
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.N.A.	Land Needs Assessment
M.D.S.	Minimum Distance Separation
M.M.A.H.	Ministry of Municipal Affairs and Housing
M.C.R.	Municipal Comprehensive Review
N.A.I.C.S.	North American Classification System



List of Acronyms and Abbreviations (Cont'd)

N.F.P.O.W.	No Fixed Place of Work
O.P.	Official Plan
P.P.S.	Provincial Policy Statement
P.P.U.	Persons Per Unit
P.R.E.	Population-Related Employment
S.A.B.E.	Settlement Area Boundary Expansion



Executive Summary



Executive Summary

Introduction

The County of Brant Official Plan (O.P.) is a long-range strategic planning document, that describes how and where a municipality will grow and how land will be used and developed in the County over a long-term planning horizon. The County of Brant is currently preparing a new O.P. to describe the type of residential and employment growth the community wants and where that growth should occur over the next 30 years. The process of preparing a revision to an Official Plan includes a Municipal Comprehensive Review (M.C.R.), in accordance with section 26 of the *Planning Act*. This process is required to bring the County's O.P. into conformity with A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019 (as amended) (the Growth Plan, 2019), and to reflect current provincial policy direction and the County's future land needs. Integral to the County's new O.P. is a comprehensive review of how new development will be planned, phased, and accommodated to the year 2051. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development.

Background

In July 2021, the County released a draft report of the County of Brant Municipal Comprehensive Review (M.C.R.) with the draft new O.P. for public comment. The key findings of the County's draft M.C.R. Draft Report were presented at virtual Public Meetings held on July 31, 2021 and August 10, 2021. It is important to note that County Council, stakeholders, Indigenous communities and the public have been consulted throughout the M.C.R. process and with the draft new O.P. since the process commenced in November 2019. This has included multiple Council meetings, presentations, and Town Hall engagement sessions. The documents were sent to the Province for the 90-day One Window Review on August 17, 2021, from which the County anticipated feedback and comments. On December 29, 2022, the County of Brant received a letter from the Ministry of Municipal Affairs indicating that no formal comments would be received, and that the County should proceed to finalize the New Official Plan keeping in mind future legislative and policy changes related to the Province's Housing Supply Action Plan.



The purpose of this Addendum is to document and summarize key refinements that have been made to the 2021 County of Brant M.C.R. in response to stakeholder feedback on the draft technical findings and policy recommendations provided in the draft M.C.R. This update also incorporates a review of new data sources available since the release of the draft report (i.e., 2021 Statistics Canada Census data as well as other economic and demographic data).

In summary, this Addendum report outlines key updates to the 2021 County of Brant M.C.R., as follows:

- Updated County-wide population, housing and employment forecasts in accordance with the results of the 2021 Census as well as other relevant data released since the 2021 County of Brant M.C.R. (Appendices A and B);
- Updated population and housing forecasts and allocations by settlement area and the remaining rural area (Appendix C);
- Additional details regarding population, housing and employment allocations by rural settlement area (Appendix C);
- Re-defining Burford as part of the Urban System when considering the long-term hierarchy of this primary settlement area (Chapter 2, subsection 2.1.4);
- Adjustments to the County of Brant 2051 Community Area surplus to reflect added surplus Community Area lands in the Primary Settlement Area of Burford (Chapter 2, subsection 2.4.1);
- Recommended removal of Community Area Excess Lands policy (Chapter 2, subsection 2.4.2);
- Update to the County's vacant Employment Area land supply to reflect Council direction regarding Employment Area conversions (Chapter 3, section 3.3);
- An updated Urban Employment Area land needs assessment (L.N.A.) recognizing stronger demand for Urban Employment Area lands in the Paris Highway 403/Rest Acres Road Corridor (Chapter 3, section 3.4);
- Planning policy considerations regarding Rural Employment Areas – Airport Employment Area and Cainsville Employment Area (Chapter 3, subsection 3.5.1); and;
- A revised Settlement Boundary Expansion Area (S.A.B.E.) review analysis for Highway 403/Rest Acres Road corridor Employment Area (Chapter 4, section 4.1).



Please note, to ensure all final technical information regarding the County's M.C.R. is readily accessible, all appendices provided in the 2021 County of Brant M.C.R. Draft Report have been included in this Addendum. Provided below is a more detailed discussion of the recommended refinements that have been made to the 2021 County of Brant M.C.R. Draft Report. Key items are summarized within the context of the County's long-term growth analysis, Community Area land needs and Employment Area land needs.

Long-Term Growth Analysis

1. Statistics Canada released the results of the 2021 Census which offered the opportunity to review the County's 2021 estimated population and housing base by settlement area and the remaining rural area.
2. In accordance with this review of the 2021 Census data, as well as a review of other available relevant data released since the completion of the 2021 County of Brant M.C.R. Draft Report, a number of refinements have been made to the County's population, household and employment growth forecasts. Key changes to the population and housing forecasts include updates to the 2021 base as well as an upward adjustment to the timing of growth within Paris resulting in a greater share of the County's population and housing growth to Paris in the short-term horizon. A corresponding reduction in growth over the 2031 to 2051 period has been applied to Paris, thus increasing the share of growth to other areas of the County post-2031. It is noted that these changes to the forecast in Paris do not change the intensification and long-term Community Area land requirements for Paris and St. George, as further discussed in item 7.
3. In response to requests by County of Brant Council and staff, additional details have been provided regarding the growth allocations in the County's Rural Areas, including forecasts for each of the County's rural settlement areas.
4. Over the long-term planning horizon no substantial changes have been made to the County-wide population, housing and employment forecasts to 2051. Furthermore, no changes have been made to the population, housing and employment forecasts for Paris and St. George by 2051. Accordingly, the County of Brant is still planned to reach a minimum population of 59,000 and an



employment base of 26,000 by 2051, as per Schedule 3 of the Growth Plan, 2019.

5. Over the 30-year forecast period, the County is anticipated to experience an increase in its average annual rate of household growth to approximately 256 housing units annually, compared to approximately 165 housing units per year over the 2001 to 2021 period. This long-term housing growth assumption remains unchanged from the 2021 County of Brant M.C.R. Draft Report. The upward adjustment to the short-term housing forecast as part of the M.C.R. 2023 Update addresses the recent surge in housing activity largely driven by the impacts of the coronavirus disease (COVID-19) pandemic and continues to recognize that future housing demand over the next three decades for the County of Brant is anticipated to remain at levels well above historical long-term annual averages.
6. At this time, it is not anticipated that a higher long-term population and employment forecasts, beyond that which are set out in Schedule 3 of the Growth Plan, 2019, will be utilized in the County's new O.P. for long-term planning purposes. In accordance with the analysis provided in the 2021 County of Brant M.C.R. Draft Report (refer to subsection 3.3.5), as well as a further review of recent population and housing growth trends summarized herein in subsection 2.2.1, the County's 2051 population forecast is still forecasted to be approximately 59,000 people. It is noted, however, that adjustments have been made to the forecast over the short term to reflect the results of the 2021 Census and recent County of Brant residential building permit activity. Figures 2-6 through 2-8, herein, provide a summary of the County of Brant population and housing forecasts.
7. It is recommended that the County continue to monitor the population and housing forecasts annually with further consideration of how the County is tracking in terms of growth allocations, density (people and jobs in the designated greenfield area (D.G.A.)) and intensification targets. A proposed growth monitoring tool would be beneficial in understanding how to phase future urban development, particularly in Paris, St. George and Burford, as additional information is made available with respect to municipal water and wastewater capacity in these areas.



Community Area Land Needs

8. The population forecast to 2051 for Paris and St. George is a population of 25,400 and 7,500 persons, respectively. Based on current land supply, Paris can accommodate an additional 6,500 persons beyond the 2051 forecast, while St. George and accommodate an additional 9,200 persons. The buildout of the designated land supply in Paris and St. George has the potential to accommodate a population of 31,900 and 16,700 persons respectively, based on housing supply in the planning process, housing potential on vacant lands and housing potential through intensification. It is important to note that development on intensification sites will take significantly more time to fully develop than the greenfield lands.
9. A further review of the County's long-term Community Area land needs assessment (L.N.A.), provided herein, confirms that the County of Brant continues to have a surplus of residential D.G.A. lands in Primary Settlement Areas, which is at least what is required to accommodate the forecast growth for the long-term horizon of the O.P. As noted in the 2021 County of Brant M.C.R. Draft Report, the County's Community Area land surplus as of 2051 is 742 gross developable hectares (ha). The County's combined urban Community Area land surplus to 2051 for Paris and St. George remains unchanged at 395 gross developable ha, as previously identified in the 2021 County of Brant M.C.R. Draft Report. An additional urban Community Area land surplus of 347 ha has been identified for the Community of Burford (refer to items 10 and 11 below).
10. Notwithstanding the identified Community Area land surplus identified for the County by 2051, the proposed Excess Lands policy in the new O.P. has been removed. Excess Lands were described on Schedule 2 – Designated Greenfield Areas – of the County of Brant's draft new O.P in the July 2021 version. In accordance with subsection 2.2.1.6 of the Growth Plan, 2019, Excess Lands are defined as designated developable urban lands that are not needed to accommodate forecast growth over the 2051 planning horizon.^[1] Upon further

^[1] In accordance with the A Place to Grow, Growth Plan, 2019, p. 70, Excess Lands are defined as vacant, unbuilt but developable lands within settlement areas but outside of delineated built-up areas that have been designated for development but are in excess of what is needed to accommodate forecast growth to the horizon of this Plan.



consideration of this policy and its application to the County of Brant, the proposed Excess Lands policy has been removed to ensure that the County's designated and developable Community Area lands are not unduly constrained, as greater demand for urban development is realized over the long-term horizon of the County's O.P. within the Primary Settlement Areas of Paris, St. George and Burford. The phasing and ultimate development approval of urban lands within the County's Primary Settlement Areas will be subject to available municipal water and wastewater capacity, and integration of transportation networks.

11. In accordance with provincial feedback on the 2021 County of Brant M.C.R. Draft Report, the Burford Primary Settlement Area is recommended to remain as part of the County's Urban System, which is identified in the current 2012 O.P. This direction is recommended recognizing that Burford has a delineated built-up boundary (B.U.A.) and D.G.A., as defined by the Province in the 2006 Growth Plan. Technically, all settlement areas within G.G.H. municipalities that have a delineated B.U.A. are identified as part of the Urban System. As discussed in this Addendum, growth in Burford is anticipated to increase in the later part of the 2051 planning horizon (i.e., post-2036), as servicing improvements may provide opportunities for large-scale D.G.A. development. In the short and medium term planning horizon, growth in Burford represents a very small share of the County's growth and is confined to the B.U.A. of Burford until the availability of full water and wastewater servicing.
12. In accordance with the updated L.N.A. provided herein, a Community Area land surplus in Burford of approximately 347 ha has been identified.

Employment Areas

13. Maintaining an adequate Employment Area land supply over the planning horizon has been raised as a key objective of County staff and Council. Since the release of the County of Brant 2021 M.C.R. Draft Report, the County has experienced continued industrial development activity and a significant increase in development interest in the Paris Highway 403 Business Park. This has led to the need to re-examine long-term Employment Area land demand for this area to ensure the County can accommodate higher forecast rates of land absorption



and provide adequate market choice of vacant sites by location, size and land designation to prospective industrial and commercial businesses.

14. Two distinct Employment Areas in the Rural Areas – the Airport Employment Area and the Cainsville Employment Area – provide unique opportunities for future economic and employment opportunities for the County. Both Employment Areas have the potential for further future municipal servicing as part of the servicing agreement with the City of Brantford. These Employment Areas should be recognized as a strategic focus for the County. The County of Brant Employment Area Strategy, currently underway (expected to be completed in Fall 2023), will explore employment and economic opportunities, including the vision and types of sectors that would be attracted to these Employment Areas.
15. As part of the 2021 County of Brant M.C.R. Draft Report, several S.A.B.E. requests adjacent to the Paris Highway 403 Business Park were received and reviewed. In accordance with S.A.B.E. evaluation criteria established through the 2021 County of Brant M.C.R. (refer to Chapter 8, section 8.2 of the 2021 County of Brant M.C.R.), specific sites adjacent to the Paris Highway 403 Business Park were recommended for Employment Area expansion to accommodate anticipated Employment Area land demand to the year 2051. The Paris Highway 403 Business Park is considered a key opportunity for the County in reaching its employment forecast. The S.A.B.E. requests in the Paris Highway 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes:
 - Municipal Servicing (water/wastewater and transportation);
 - Environmental Protection and Protection of Resources;
 - Agriculture & Agri-Food Network;
 - Cross-jurisdiction Impacts;
 - Land Use Planning; and
 - Market Analysis.

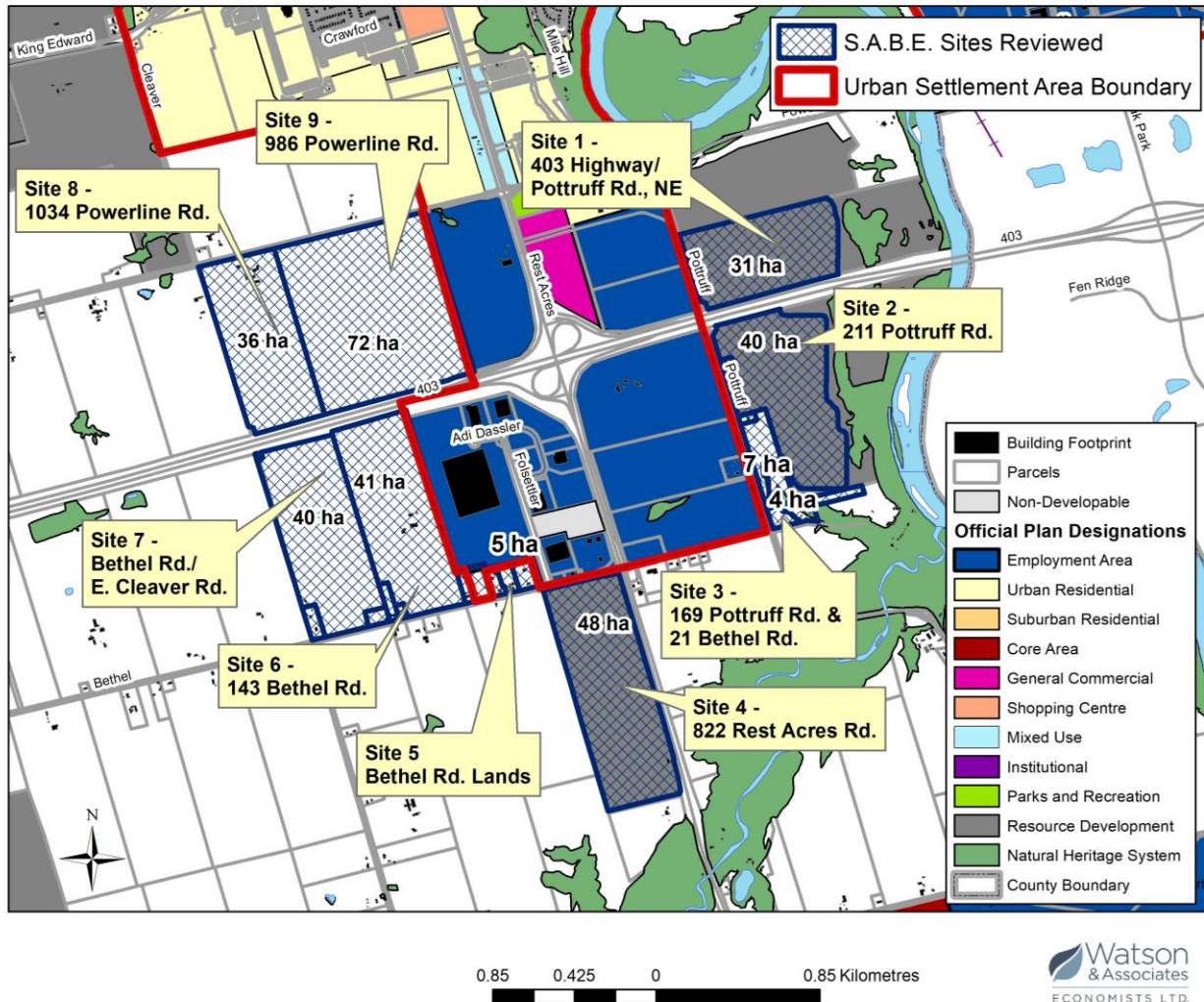
Chapter 8 of the 2021 County of Brant M.C.R. Draft Report and Appendix L of this Addendum provide a summary of the S.A.B.E. evaluation criteria based on the above six themes, which have been organized to address the policy requirements of the Growth Plan, 2019, the P.P.S., 2020 and local criteria.



16. Figure E-1 provides a map of the nine S.A.B.E. Urban Employment Area requests in the Paris Highway 403 Business Park, including size of site (net of environmental features). Overall, the nine packaged requests total approximately 324 gross ha (net of natural heritage features and constraint lands). As previously discussed, the County requires 250 gross ha of Employment Area land in Paris to accommodate employment growth to 2051. Based on the Employment Area land requirements and the evaluations of the S.A.B.E, it is recommended that the County expand the Paris Highway 403 Business Park to include most of the sites identified in Figure E-1. The only S.A.B.E. to be excluded is Site 4 (measuring approximately 48 ha). Site 4 provides more land that is required over the planning horizon and is surrounded by agricultural uses. Furthermore, Site 4 would not support a distinct edge to an Employment Area for planning purposes.



Figure E-1
County of Brant
S.A.B.E. Urban Employment Area Sites Reviewed



Notes: Figure includes current County of Brant O.P. (2012) Designations. Land area estimates by site area are net of estimated Natural Heritage System lands.

17. As part of the S.A.B.E. analysis, it was determined that approximately 276 ha of Employment Area lands should be added to the urban area, including 250 ha for the identified need, as well as 26 ha to round out the area for planning purposes. It should be noted that the amount of additional land, net of the Natural Heritage System, is an estimate and would be further refined as development applications are submitted.



18. Based on this review, the County’s Urban Employment Area land needs have been increased from 110 ha to 250 ha. This increase to the Urban Employment Area land needs assessment has eliminated the need to plan for a Future Strategic Employment Reserve Lands Overlay in the Paris Highway 403 Business Park.

Figures E-2 through E-5 summarize the key changes to the County’s growth analysis and urban land needs assessment between the 2021 County of Brant M.C.R. Draft Report and this Addendum.

Figure E-2
County of Brant
M.C.R. Addendum, April 2023 – Summary of Population, Housing
and Community Area Land Needs

Location	2021 Population	2051 Population	2021 Households	2051 Households	Community Area Land Surplus (ha)
Paris	15,400	25,400	5,655	9,870	231
St. George	3,500	7,500	1,240	2,850	164
Burford	1,800	2,400	690	945	347
Rural System	20,000	23,700	6,740	8,325	-
County of Brant	40,700	59,000	14,325	21,990	742

Note: Population includes Census undercount. 2021 population and housing estimates are derived from Statistics Canada 2021 Census.

Source: Watson & Associates Economists Ltd., 2023.



Figure E-3
County of Brant
2021 M.C.R. Draft Report – Summary of Population, Housing
and Community Area Land Needs

Location	2021 Population	2051 Population	2021 Households	2051 Households	Community Area Land Surplus (ha)
Paris	14,400	25,400	5,460	9,870	231
St. George	3,500	7,500	1,265	2,850	164
Rural System (includes Burford)	22,600	26,100	7,730	9,225	-
County of Brant	40,500	59,000	14,455	21,945	395

Note: Population includes Census undercount. 2021 figures are an estimate in the County of Brant M.C.R. Draft Report, July 2021 by Watson & Associates Economists Ltd.
Source: Watson & Associates Economists Ltd.

Figure E-4
County of Brant
M.C.R. Addendum, April 2023 – Summary of Employment
and Employment Area Land Needs

Location	2021 Employment	2051 Employment	2051 Urban Employment Area Land Surplus/(Deficit)
Paris	8,300	15,500	(250)
St. George	1,200	3,000	0
Burford	600	900	0
Rural System	5,900	6,600	-
County of Brant	16,000	26,000	(250)

Note: 2021 Employment is an estimate by Watson & Associates Economists Ltd.
Source: Watson & Associates Economists Ltd.

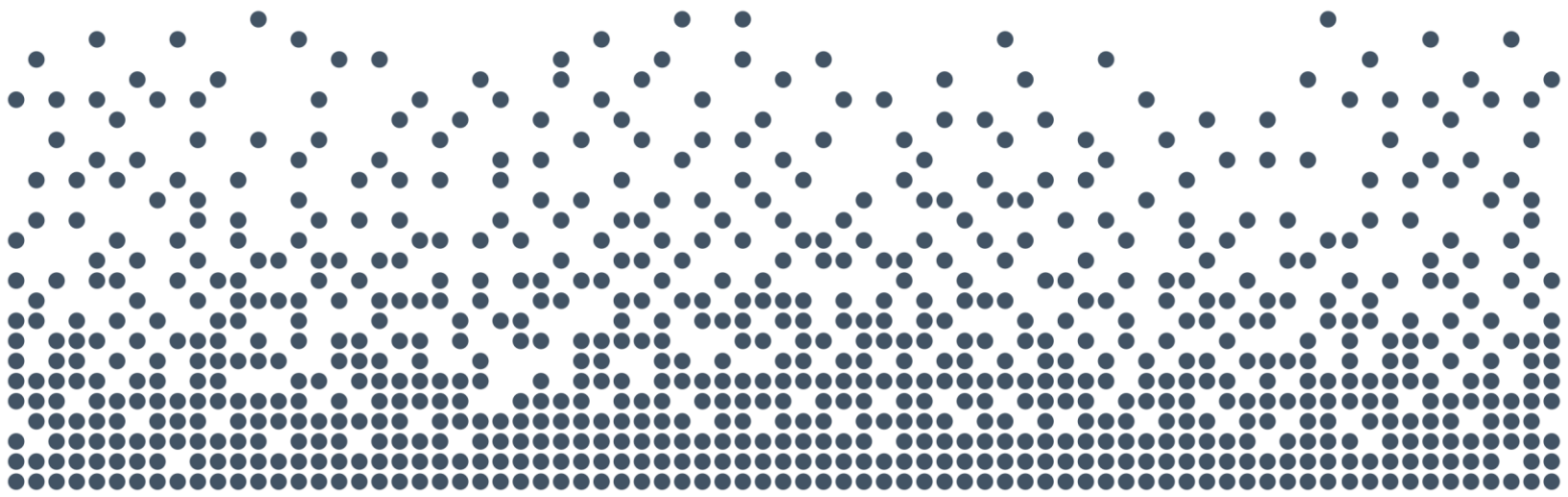


Figure E-5
County of Brant
2021 M.C.R. Draft Report – Summary of Employment
and Employment Area Land Needs

Location	2021 Employment	2051 Employment	2051 Urban Employment Area Land Surplus/(Deficit)
Paris	8,300	15,500	(110)
St. George	1,200	3,000	5
Rural System (includes Burford)	6,500	7,500	-
County of Brant	16,000	26,000	(105)

Note: 2021 Employment is an estimate in the County of Brant M.C.R. Draft Report, July 2021 by Watson & Associates Economists Ltd.

Source: Watson & Associates Economists Ltd., 2023.



Report



Chapter 1

Introduction



1. Introduction

1.1 Background

In July 2021, the County released a draft report of the County of Brant Municipal Comprehensive Review (M.C.R.) with the draft new Official Plan (O.P.) for public comment. The key findings of the County's M.C.R. Draft Report were presented at virtual Public Meetings held on July 31, 2021, and August 10, 2021. It is important to note that County Council, stakeholders, Indigenous communities and the public have been consulted throughout the M.C.R. process and with the new O.P. since the process commenced in November 2019. This has included multiple Council meetings, presentations, and multiple (virtual) Town Hall engagement sessions over 2021. The documents were sent to the Province for the 90-day One Window Review on August 17, 2021, from which the County anticipated feedback and comments. On December 29, 2022, the County of Brant received a letter from the Ministry of Municipal Affairs indicating that no formal comments would be received.

The primary purpose of this Addendum is to document and summarize the key refinements made to the 2021 County of Brant M.C.R. Draft Report in response to stakeholder feedback on the technical findings and policy recommendations provided in the draft M.C.R. This update also incorporates our review of new data sources available since the release of the draft report (i.e., 2021 Statistics Canada Census data as well as other economic and demographic data).

1.2 Overview of Key Changes to the County of Brant Municipal Comprehensive Review

This Addendum report outlines key updates to the 2021 County of Brant M.C.R. Draft Report, as follows:

- Updated County-wide population, housing and employment forecasts in accordance with the results of the 2021 Census and other relevant data released since the 2021 County of Brant M.C.R. Draft Report (Appendix B);
- Updated population and housing forecasts and allocations by settlement area and the remaining rural area (Appendix C);



- Additional details regarding population, housing and employment allocations by rural settlement area (Appendix C);
- Recommendation that the Community of Burford is a part of the County's Urban System when considering the long-term urban hierarchy of this settlement area (Chapter 2, subsection 2.1.4);
- Adjustments to the County of Brant 2051 Community Area surplus to reflect added surplus Community Area lands in the Community of Burford (Chapter 2, subsection 2.4.1);
- Recommended removal of the Community Area Excess Lands policy (Chapter 2, subsection 2.4.2);
- Update to the County's vacant Employment Area land supply to reflect Council direction regarding Employment Area conversions (Chapter 3, section 3.3);
- An updated urban Employment Area land needs assessment recognizing stronger demand for Urban Employment Area lands in the Paris Highway 403/ Rest Acres Road Corridor (Chapter 3, section 3.4);
- Planning policy considerations regarding Rural Employment Areas – Airport Employment Area and Cainsville Employment Area (Chapter 3, subsection 3.5.1); and;
- A revised Settlement Boundary Expansion Area (S.A.B.E.) review analysis for the Paris Highway 403/Rest Acres Road Corridor Employment Area (Chapter 4, section 4.1).

Please note, to ensure all final technical information regarding the County's M.C.R. is readily accessible, all appendices provided in the 2021 County of Brant M.C.R. Draft Report have been included in this Addendum. Provided below is a more detailed discussion of the recommended refinements made to the 2021 County of Brant M.C.R. Draft Report. Key items are summarized within the context of the County's long-term growth analysis, Community Area land needs and Employment Area land needs.

Long-Term Growth Analysis

1. Statistics Canada released the results of the 2021 Census which offered the opportunity to review the County's 2021 estimated population and housing base by settlement area and the remaining rural area.



2. In accordance with the review of the 2021 Census data as well as a review of other available relevant data released since the completion of the 2021 County of Brant M.C.R. Draft Report, a number of refinements have been made to the County's population, household and employment growth forecasts. Key changes to the population and housing forecasts include updates to the 2021 base as well as an upward adjustment to the timing of growth within Paris resulting in a greater share of the County's population and housing growth to Paris in the short-term horizon. A corresponding reduction in growth over the 2031 to 2051 period has been applied to Paris, thus increasing the share of growth to other areas of the County post-2031. It is noted that these changes to the forecast in Paris do not change the intensification and long-term Community Area land requirements for Paris and St. George, as further discussed in item 7.
3. In response to requests by County of Brant Council and staff, additional details have been provided regarding the growth allocations in the County's Rural Areas, including forecasts for each of the County's rural settlement areas.
4. Over the long-term planning horizon, no substantial changes have been made to the County-wide population, housing and employment forecasts to 2051. Furthermore, no substantive changes have been made to the population, housing and employment forecasts of Paris and St. George by 2051. Accordingly, the County of Brant is still planned to reach a minimum population of at least 59,000 and an employment base of at least 26,000 jobs by 2051.
5. At this time, higher long-term population and employment forecasts are not recommended to be utilized in the County's new O.P. for long-term planning purposes. Further discussion in this regard is provided in Chapter 2, subsection 2.2.2.
6. It is recommended that the County continue to monitor the population and housing forecasts with further consideration of how the County is tracking in terms of growth allocations, density (people and jobs in the designated greenfield area (D.G.A.)) and intensification targets. A proposed growth monitoring tool would be beneficial in understanding how to phase future urban development, particularly in Paris, St. George and Burford, as additional information is made available with respect to municipal water and wastewater capacity in these areas.



Community Area Land Needs

7. A further review of the County's long-term Community Area land needs assessment (L.N.A.), provided herein, confirms that the County of Brant continues to have a surplus of residential D.G.A. lands in Primary Settlement Areas, in excess of what is required to accommodate the forecast growth for the long-term horizon of the O.P. As noted in the 2021 County of Brant M.C.R. Draft Report, the County's Community Area land surplus as of 2051 is 742 gross developable hectares (ha). The County's combined urban land surplus to 2051 for Paris and St. George remains unchanged at 395 gross developable ha, as previously identified in the 2021 County of Brant M.C.R. Draft Report. An additional urban land surplus of 347 ha has been identified for the Community of Burford (refer to items 10 and 11 below).
8. Notwithstanding the identified Community Area land surplus identified for the County by 2051, the proposed Excess Lands policy in the new O.P. has been removed. In accordance with subsection 2.2.1.6 of the Growth Plan, 2019, Excess Lands are defined as designated developable urban lands that are not needed to accommodate forecast growth over the 2051 planning horizon.^[1] Upon further consideration of this policy and its application to the County of Brant, the proposed Excess Lands policy has been removed to ensure the County's designated and developable Community Area lands are not unduly constrained in the event that greater demand for urban development is realized over the long-term horizon of the County's O.P. within the Primary Settlement Areas. It is noted that the phasing and ultimate development approval of urban lands within the County's Primary Settlement Areas will be subject to available municipal water and wastewater capacity within these areas.
9. In accordance with provincial feedback on the 2021 County of Brant M.C.R. Draft Report, the Burford Settlement Area is recommended to remain as part of the County's Urban System. This direction is recommended recognizing that the Burford Settlement Area has a delineated built-up boundary (B.U.A.) and D.G.A.

^[1] In accordance with the Growth Plan, 2019, p. 70, Excess Lands are defined as vacant, unbuilt but developable lands within settlement areas but outside of delineated built-up areas that have been designated in an Official Plan for development but are in excess of what is needed to accommodate forecast growth to the horizon of this Plan.



as defined by the Province in the 2006 Growth Plan. Technically, all settlement areas within Greater Golden Horseshoe (G.G.H.) municipalities that have a delineated B.U.A. are identified as part of the Urban System. As discussed in this Addendum, growth in Burford is anticipated to increase in the later part of the 2051 planning horizon (i.e., post-2036), as servicing improvements may provide opportunities for large-scale D.G.A. development. In the short and medium term, growth in Burford represents a very small share of the County's growth and is confined to the B.U.A. of Burford due to the current unavailability of water and wastewater servicing.

10. In accordance with the updated L.N.A., provided herein, a Community Area land surplus in Burford of approximately 347 ha has been identified.

Employment Area Land Needs

11. Maintaining an adequate Employment Area land supply over the planning horizon has been raised as a key objective of County staff and Council. Since the release of the 2021 County of Brant M.C.R. Draft Report, the County has experienced continued industrial development activity and a significant increase in development interest in the Paris Highway 403 Business Park. This has led to the need to re-examine long-term Employment Area land demand for this area to ensure that the County can accommodate higher forecast rates of land absorption and provide adequate market choice of vacant sites by location, size and land designation to prospective industrial and commercial businesses.
12. Based on this review, the County's Urban Employment Area land needs have been increased from 110 ha to 250 ha. This increase to the Urban Employment Area land needs assessment has eliminated the need to plan for a Future Strategic Employment Reserve Lands Overlay in the Paris Highway 403 Business Park.



1.3 Policy Context

1.3.1 Provincial Policy Context

1.3.1.1 Provincial Policy Statement, 2020

The Provincial Policy Statement, 2020 (P.P.S., 2020) provides policy direction on matters of provincial interest relating to land use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions “shall be consistent with” the P.P.S., 2020 (*Planning Act*, R.S.O. 1990, c. P. 13 s. 3).

The P.P.S., 2020 came into effect on May 1, 2020.^[1] Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019) and the on-going updates to the Growth Plan. Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and to reduce barriers and costs to the land use planning system in order to provide greater predictability.

A significant change of the P.P.S., 2020 with regard to housing policy is the provision of a housing options approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (policy 1.4.3). Providing for housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

“A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.”

[1] Provincial Policy Statement, 2020 – Under the *Planning Act*. Ontario.



Throughout the P.P.S., 2020, there is strong encouragement to consider the market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms that they have not historically had considerable success in implementing. As such, when discussing the outlook for the real estate market, it is important to discuss both existing conditions and the driving factors that are anticipated to encourage and disrupt housing market demand by structure type and built form. Furthermore, while market demand is important when considering long-range land use planning, this demand must be broadly considered within the context of provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and diversifying an economic base and supporting job creation.

Notable policies related to planning for Employment Areas in the updated P.P.S., 2020 include requiring municipalities to have enough urban land supply to meet projected needs for a planning horizon of 25 years and include Employment Areas as areas that could be planned for beyond this horizon, provided they are not designated beyond the planning horizon.

The P.P.S., 2020 recognizes the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. It provides details on how municipalities should plan for employment. The P.P.S., 2020 policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The policy further outlines that, during an O.P. review or update, planning authorities are to assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2).



1.3.1.2 *A Place to Growth: Growth plan for the Greater Golden Horseshoe, 2019*

The Growth Plan, 2019, which was created under the *Places to Grow Act, 2005*, was updated in May 2019 and amended in August 2020. It sets out where and how growth will occur across the G.G.H. to 2051 and that all planning decisions shall conform to it.

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. Relevant aspects of the Growth Plan, 2019 for this study include the following:

Managing and Directing Growth

- Growth will be directed to settlement areas with existing or planned public service facilities;
- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential with convenient access to local stores, services and public service facilities;
- Municipalities should plan for a diverse range and mix of housing options, including second units and affordable housing, to accommodate people at all stages of life, and to accommodate the needs of all household sizes and incomes;
- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of mixed-use, pedestrian-friendly urban environments; and
- Municipalities should preserve lands within settlement areas in the vicinity of major highway interchanges, ports, rail yards and airports for manufacturing and associated retail, office and ancillary facilities where appropriate.

Minimum Intensification Targets^[1]

- Minimum intensification targets, the minimum percentage of all residential development occurring annually within the delineated B.U.A. are identified for

[1] A Place to Growth: Growth plan for the Greater Golden Horseshoe, 2019, subsection 2.2.2.



upper-tier and single-tier municipalities in the G.G.H. There are two geographic groups for intensification targets. The County of Brant is in the lower intensification target group, which requires that by the time the next M.C.R. is approved and in effect, and for each year thereafter, the County maintain or improve upon the minimum intensification target contained in the O.P.

- It is important to note that all upper-tier and single-tier municipalities within the G.G.H. can apply for alternative intensification targets.

Minimum Greenfield Density Targets^[1]

- Minimum density targets have been created for the horizon of the Growth Plan, 2019 for G.G.H. upper-tier and single-tier municipalities and include two geographic groups. It is important to note that the greenfield density targets established in the Growth Plan, 2019 do not include employment lands.^[2] The County of Brant is in the lower density target group, which is required to plan to achieve, within the horizon of the Growth Plan, a minimum density target that is not less than 40 residents and jobs combined per ha.
- All upper-tier and single-tier municipalities can apply for alternative D.G.A. density targets.

Employment^[3]

- According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within the settlement area. The density targets are to reflect the current and anticipated type and scale of employment that characterizes the Employment Area to which the target applies. Furthermore, the minimum employment density target reflects opportunities for the intensification of Employment Areas on sites that support active transportation and are served by existing or planned transit.^[4]

^[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, subsection 2.2.4.

^[2] Ibid., subsection 2.2.7.

^[3] Ibid., subsection 2.2.4.

^[4] Ibid., subsection 2.2.5.



- As part of the Growth Plan, 2019, the Province allows for employment land conversions outside of an M.C.R., while ensuring protections are in place to safeguard key Employment Areas as needed.
- The conversion of employment lands to a designation that permits non-employment uses is allowed outside of an M.C.R., provided that
 - there is a need;
 - a significant number of jobs are maintained on those lands through the establishment of development criteria;
 - there are no adverse effects on the viability of an Employment Area or the achievement of minimum intensification targets; and
 - there are existing or planned services in place.^[1]

Settlement Area Boundary Adjustments and Expansions^[2]

- The Growth Plan, 2019 places emphasis on a more outcome-focused approach to urban boundary expansions, rather than specifying types of studies required to justify the feasibility and location of expansions.
- Municipalities are allowed to undertake S.A.B.E.s that are no larger than 40 ha (approximately 99 acres) outside of the M.C.R. process, subject to criteria.
- Settlement area boundary adjustments are also permitted outside of an M.C.R. provided there is no net increase in land within settlement areas, subject to criteria.
- If applicable, municipalities within the G.G.H. Outer Ring are required to identify excess lands and prohibit development on such lands to the horizon of the Growth Plan, 2019.

It is important to note that the recommended Schedule 3 growth forecasts are to be treated as minimums, with higher growth forecast alternatives permitted by upper- and single-tier municipalities through their respective M.C.R. processes.^[3] If an alternative growth forecast that exceeds Schedule 3 of the Growth Plan, 2019 is utilized, the M.C.R. must demonstrate that the alternate growth scenario meets the Growth Plan, 2019 policy objectives of accommodating a range of housing choices to meet market

[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, subsection 2.2.5.10.

[2] Ibid., subsection 2.2.8.

[3] Growth Plan, Office Consolidation 2020, Policy 5.2.4, p. 56.



demand and the needs of current and future residents, as well as providing additional opportunities for the G.G.H. labour market.^[1] It should be noted that higher forecasts established by upper- and single-tier municipalities through their M.C.R.s will not apply to provincial ministries and agencies.^[2]

1.3.1.3 *Land Needs Assessment Methodology for the Greater Golden Horseshoe*

The Minister formally issued the final L.N.A. Methodology for the Greater Golden Horseshoe on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.^[3] Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019, to assess the quantity of land required to accommodate forecast growth.

The L.N.A. methodology identifies that the results of an L.N.A. can only be implemented through an M.C.R. As previously identified, an M.C.R. is a new O.P, or an Official Plan Amendment (O.P.A.) initiated by an upper- or single-tier municipality under section 26 of the *Planning Act*, which comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

“Community Areas: Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land employment jobs. Community areas include *delineated built-up areas* and *designated greenfield areas*.”

“Employment Areas: Areas where most of the employment land employment jobs are (i.e., employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those

[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe, p. 6.

[2] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 5.2.4.8, p. 57.

[3] A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



providing services to the employment area. Employment areas may be in both *delineated built-up areas* and *designated greenfield areas*.”^[1]

1.3.1.4 Bill 23, More Homes Built Faster Act, 2022

On October 25, 2022, the Province of Ontario introduced Bill 23 (the *More Homes Built Faster Act, 2022*). Bill 23 was introduced as a part of the Province’s larger Housing Supply Action Plan, aiming to have 1.5 million homes built over the next 10 years. Bill 23 received Royal Assent by the provincial legislature on November 28, 2022. The Bill is intended to increase housing supply and provide a greater mix of ownership and rental housing options for Ontarians.

To support the provincial commitment to getting 1.5 million homes built over the next 10 years, the Act includes sweeping and substantive changes to a range of legislation, as well as through updates to regulations and consultations on various provincial plans and policies. Through the *More Homes Built Faster Act*, the Province has assigned 10-year municipal housing targets to 29 of Ontario’s largest and generally fastest growing single/lower-tier municipalities. The County of Brant is not required to provide a housing pledge; however, the principles of the Housing Supply Action Plan apply to the entire Province.

1.3.2 County of Brant New Official Plan

The County of Brant O.P. (2012) is being reviewed as part of this M.C.R. process as it relates to growth management, growth forecasts, housing, and employment directions. As part of the M.C.R. and the O.P.’s five-year review process, the County is required to update the County’s O.P. with the current version of the Growth Plan, 2019 (as amended, Office Consolidation 2020). As previously discussed, the Growth Plan, 2019 requires municipalities to update their respective O.P. to a 2051 horizon, including reviewing and evaluating the minimum density and intensification targets and forecasts contained in the Growth Plan as part of the M.C.R. process. The County is creating a new O.P. as part of the M.C.R.

[1] Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 6, 7 and 15 to 18.



Chapter 2

Community Area – Population and Housing Forecast and Growth Allocations



2. Community Area – Population and Housing Forecast and Growth Allocations

This section of the Addendum updates Chapters 2, 3, 4 and 5 of the 2021 County of Brant M.C.R. Draft Report. It is important to note that the overall County population and housing forecasts to 2051 remain unchanged, as well as the Community Area land requirements for St. George and Paris to 2051. Key underlying assumptions of the M.C.R. Draft Report have been reviewed. Key changes are summarized below and include:

- A change to the Community Structure with the inclusion of the Burford Settlement Area as part of the County’s Urban System. A summary of growth allocated to Burford is provided, as well as a calculation of the Community Area land requirements for Burford to accommodate growth to 2051.
- An update to the population and housing forecasts based on Statistics Canada 2021 Census results, as well as a slight adjustment to the County’s short-term growth to reflect recent residential building permit activity.
- A change in growth allocation to Paris to include a greater share of population and housing growth in the short term (i.e., before 2031) and a slight reduction to growth beyond 2031 to Paris. Post-2031, Burford and St. George are anticipated to capture a larger share of the growth in the Urban System due to potential for municipal servicing (water/wastewater).
- A further breakdown of growth within the Rural System, including growth by rural settlement area and the remaining rural area.

The updated County forecasts and growth allocations by settlement area are provided in Appendices A, B and C, including further details on growth within the Rural System.

2.1 Community Structure

The County of Brant includes a blend of urban and rural communities. Provided herein is an overview of the structural components of the Urban and Rural System, including an assessment of the existing County O.P. framework compared to the provincial Growth Plan, 2019 policy framework.



The Growth Plan, 2019 requires municipalities, through the M.C.R. process, to develop a hierarchy of settlement areas that identifies where and how the municipality will grow over the 2051 planning horizon. Furthermore, the Growth Plan, 2019 requires most of the growth to be directed to the Urban System, consisting of fully serviced (water/wastewater servicing) settlement areas.

In addition to an Urban System, the County of Brant has a large Agricultural and Rural System, comprising a large geographical area of the County. The Rural System also includes a portion of the County's population within rural settlement areas and several Rural Employment Areas contained within Settlement Areas, villages, hamlets or stand-alone areas. The structural components of the Rural System are different than the Urban System with respect to function, role and scale, and that these Rural Employment Areas are generally considered "dry", meaning a lack of available full water and wastewater servicing.

2.1.1 Urban System

The Urban System includes Primary Settlement Areas that are to accommodate most of the future residential and non-residential development. A key objective of the Urban System is to direct growth to areas where there is planned and existing infrastructure in a manner that supports the principles of complete communities. Complete communities include a diverse mix of land uses that provide opportunities to live, shop and work in the same community. Urban areas have a mix of uses that support complete communities, including Urban Employment Areas. Urban areas outside Urban Employment Areas are referred to as Community Areas. According to the Growth Plan, 2019, the County of Brant is required to also establish a hierarchy within the Urban System and within settlement areas.

Within the Urban System, growth is to be prioritized within the B.U.A. The B.U.A. includes an area within a settlement that was delineated by the Province to represent the approximate area developed as of 2006. The County of Brant has two fully serviced settlements with a delineated B.U.A., including Paris and St. George. The settlement area of Burford has a delineated B.U.A., but currently has no municipal servicing (water/wastewater). Over the long-term forecast horizon to 2051, Burford is anticipated to have full municipal servicing and for the purposes of the M.C.R. is consider a part of the County's Urban System over the planning horizon. Figures 2-1 through 2-3 illustrate the B.U.A. and D.G.A. of the settlements in these three communities.



Figure 2-1
County of Brant
Paris Settlement Area
D.G.A., B.U.A. and Employment Area

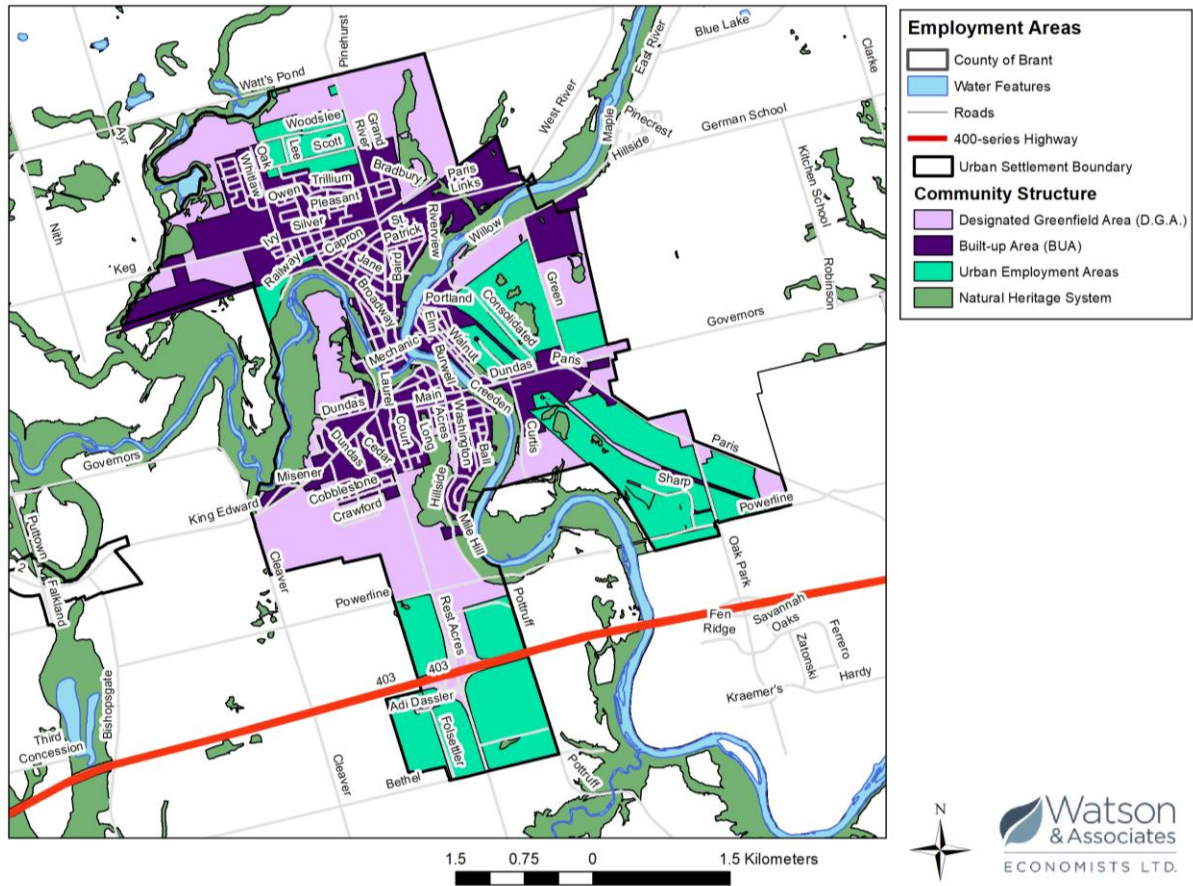




Figure 2-2
County of Brant
St. George Settlement Area
D.G.A., B.U.A. and Employment Area

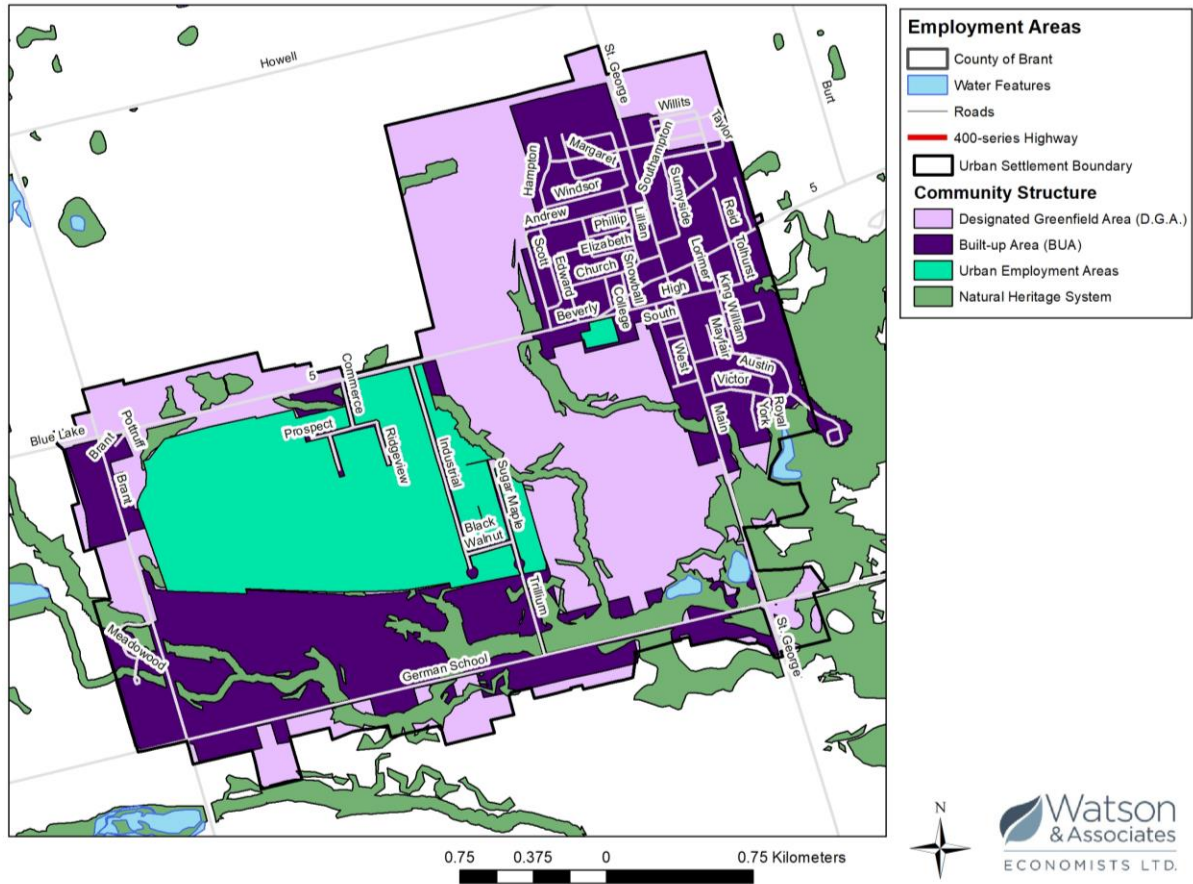
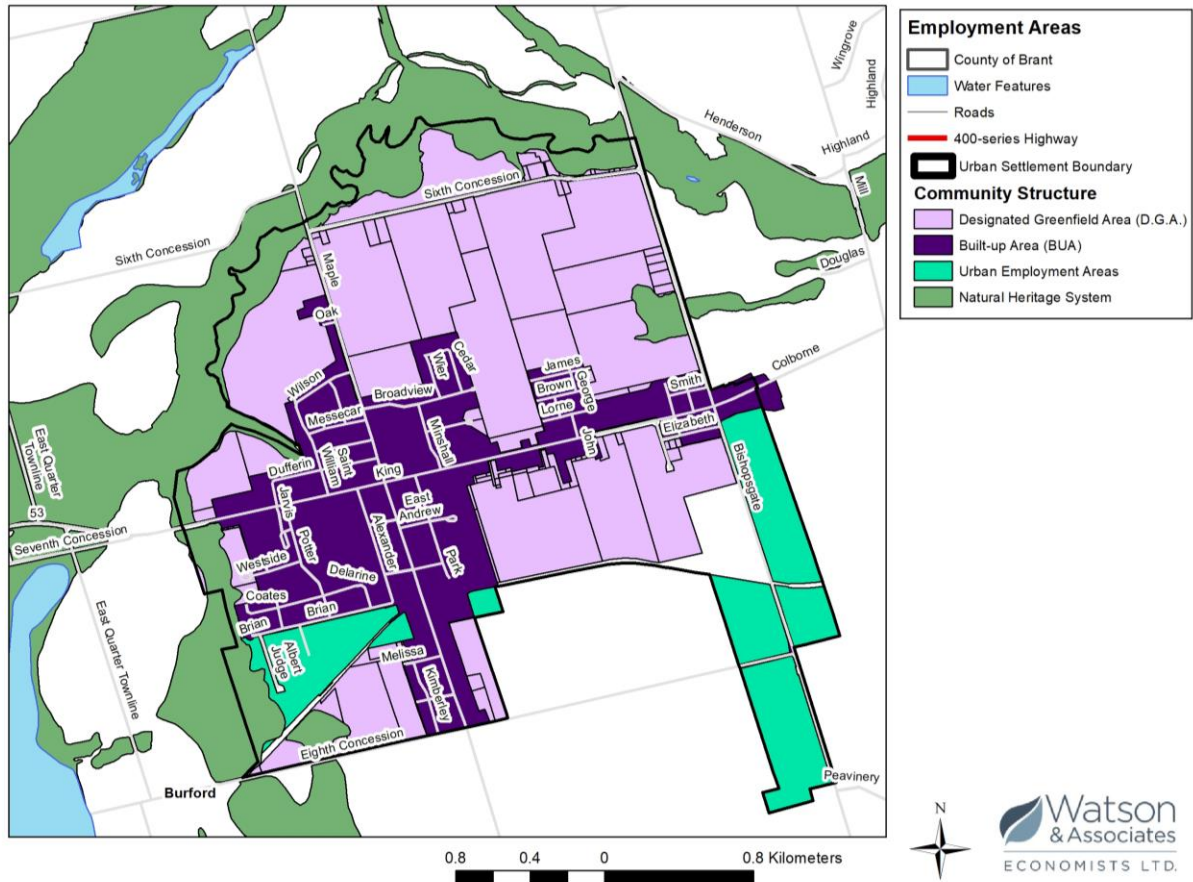




Figure 2-3
County of Brant
Burford Settlement Area
D.G.A., B.U.A. and Employment Area



Municipalities are required to explore opportunities to delineate strategic growth areas (S.G.A.s), areas that primarily prioritize intensification growth within the B.U.A. S.G.A.s can include major redevelopment areas, corridors with high-order transit, major transit station areas (M.T.S.A.s) and urban growth centres (U.G.C.s), as identified in the Growth Plan, 2019. Based on a review of the B.U.A.s in the three settlement areas, the B.U.A.s in the County do not offer a large enough geographic area and scale to identify S.G.A.s. As such, it is recommended that the County consider the entire B.U.A. as an S.G.A. for intensification.



The following is a summary of the key structural components of the Urban System:

- **Built-up Area (B.U.A.)** – priority areas to accommodate urban growth.
- **Designated Greenfield Area (D.G.A.)** – developing areas to accommodate the remaining urban growth not accommodated in the B.U.A.
- **Employment Areas** – areas that are protected from sensitive uses and accommodate export-based or industrial employment.
- **Community Areas** – areas that accommodate residential and employment outside Employment Areas, including major retail.
- **Major Retail** – commercial uses that are part of the highest level of commercial hierarchy within the urban area. Major retail is often defined by size; however, it should also be defined based on function.

2.1.2 Rural System

The Rural System includes lands that are protected from large-scale urban development. A key objective of the Rural System is to protect agriculture land, resources and the natural environment, while encouraging economic and cultural activities that support the health and prosperity of rural communities. The Rural Area is generally the area within the municipality with partial or no municipal servicing (water/wastewater servicing). According to the Growth Plan, 2019, the Rural Area comprises rural settlement areas, rural lands and prime agricultural lands.^[1]

Rural settlement areas include existing hamlets or similar existing small settlement areas that are long established in the O.P. These communities are typically serviced by individual, private, on-site water and/or private wastewater systems.^[2] According to the Growth Plan, 2019, a limited amount of growth is allocated to rural settlement areas.^[3] The County has 21 settlement areas in the County of Brant O.P. that meet the Growth Plan, 2019 definition of rural settlement areas.

Rural lands include non-prime agriculture lands (including rural residential lots) outside rural settlement areas. Rural lands accommodate uses that are not appropriate in

[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Definitions, p. 81.

[2] Ibid.

[3] Ibid., p. 13.



settlement areas, including resource-based activities and recreational activities. Rural lands also include **Rural Employment Areas**,^[1] which are defined as a cluster of industrial activities outside settlement areas, typically with partial or no services. Future Rural Employment Area growth is largely to be directed to existing designated Rural Employment Areas (as of June 16, 2006) or through expansions to accommodate existing business operations.^[2]

Prime agriculture areas are where prime agricultural lands predominate. This includes areas of prime agricultural lands and associated Canada Land Inventory Class 4 through 7 lands and additional areas where there is a local concentration of farms and ongoing agriculture activities. Prime agricultural areas are to be identified by the Ontario Ministry of Agriculture, Food and Rural Affairs (O.M.A.F.R.A).^[3]

The following is a summary of the key structural components of the Rural System:

- **Rural settlement areas** – hamlets and small-scale settlements that are to accommodate a limited amount of growth on land with private or partial servicing. According to the Growth Plan, 2019, rural settlement areas should serve as community hubs where public service facilities are maintained and adapted to the needs of the surrounding community.^[4]
- **Prime agriculture lands** – lands identified by the O.M.A.F.R.A. where agricultural uses predominate. These lands are to be protected; however, diversification of on-farm uses (uses that are secondary to the principal agricultural use of the property) is encouraged.^[5]
- **Rural Employment Areas** – clusters of industrial activities outside settlement areas on non-serviced lands. Rural Employment Area growth is limited to existing designated lands (as of June 16, 2006) or through the expansion of existing business operations.
- **Other rural lands** – all other non-serviced lands. These lands are to accommodate a limited amount of growth. Growth on these lands is primarily

[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9., p. 27 and Definitions, p. 81.

[2] Ibid., Policy 2.2.9., p. 27.

[3] Ibid., Definitions, p. 79.

[4] Ibid., Policy 2.2.9, p. 27 and Definitions, p. 81.

[5] Ibid., p. 78.



limited to resource development, recreational-based and other economic activities not accommodated within settlement areas.

2.1.3 Existing County of Brant O.P. Community Structure

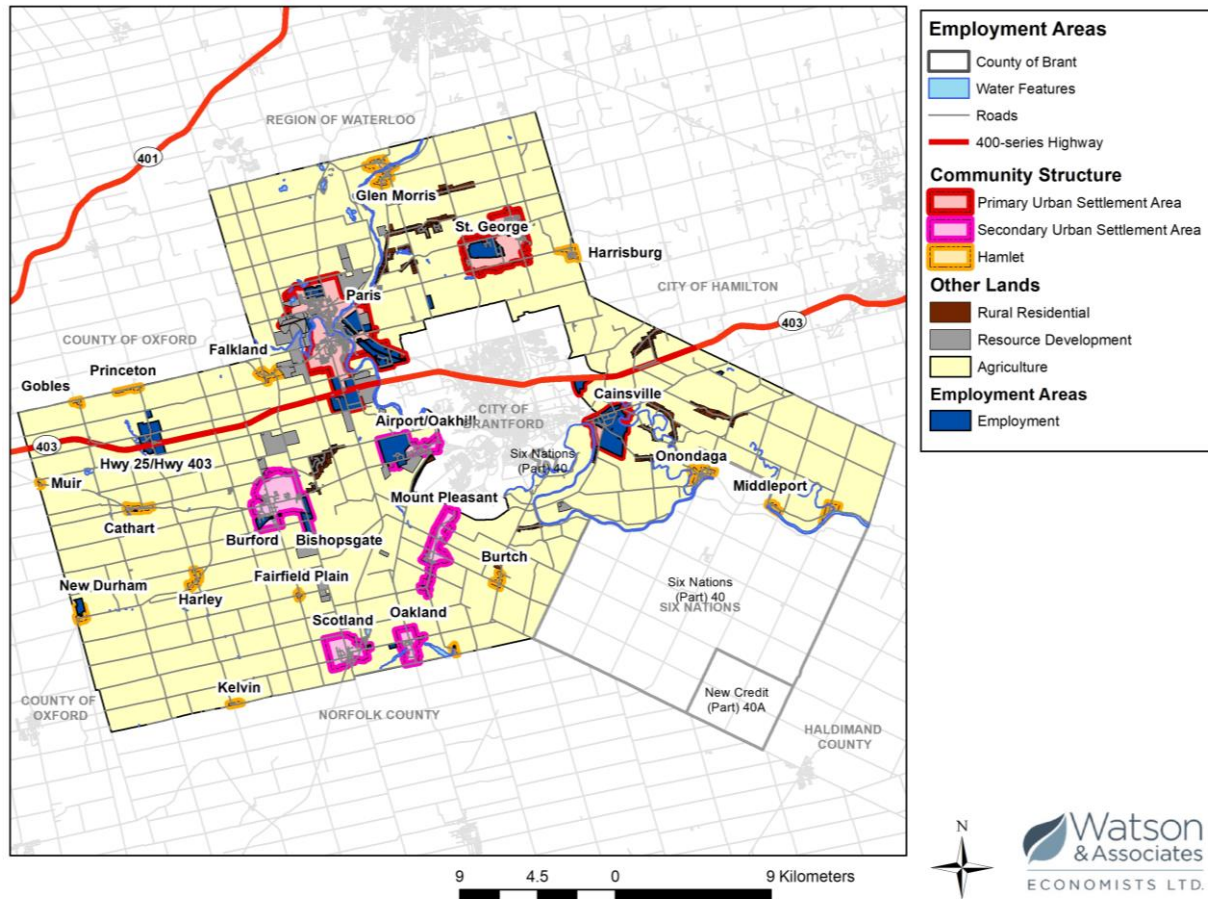
The current County of Brant O.P. (2012) Community Structure includes the following components, which is not currently conforming to the Growth Plan or P.P.S. This includes:

- Primary Settlement Areas:
 - Full Services with delineated B.U.A.: Paris and St. George.
 - Full Services: Employment Areas – Paris, St. George and Cainsville.
- Secondary Settlement Areas:
 - Partial Services: Mount Pleasant and Oakhill.
 - Partial Services: Airport Employment Area.
 - Private Services with delineated B.U.A.: Burford.
 - Private Services without delineated B.U.A.: Scotland and Oakland.
 - Private Services Employment Areas: Highway 25/Highway 403 Employment Area.
- Hamlets:
 - Private Services: 15 settlements.
- Other Employment Areas (Not a Primary or Secondary Settlement Area):
 - Private Services: five Employment Areas.
- Rural Residential Areas:
 - Private Services.
- Resource Development.
- Agriculture.

The existing County of Brant Community Structure is provided in Figure 2-4.



Figure 2-4
County of Brant
Current County of Brant O.P. (2012)
Existing Community Structure



Source: Watson & Associates Economists Ltd. based on the current County of Brant O.P. (2012).

2.1.4 Proposed Changes to the County's Community Structure, New Official Plan

A key distinction between the Rural System and the Urban System is the amount and type of growth to be allocated. The Growth Plan, 2019 requires most of the forecast growth be allocated to the areas with servicing (water/wastewater), i.e., Primary Settlement Areas. For the purposes of the M.C.R. Draft Report, Secondary Settlement Areas (as identified in the County of Brant O.P., 2012) without a built boundary are grouped within the Rural System in accordance with the Growth Plan and Provincial



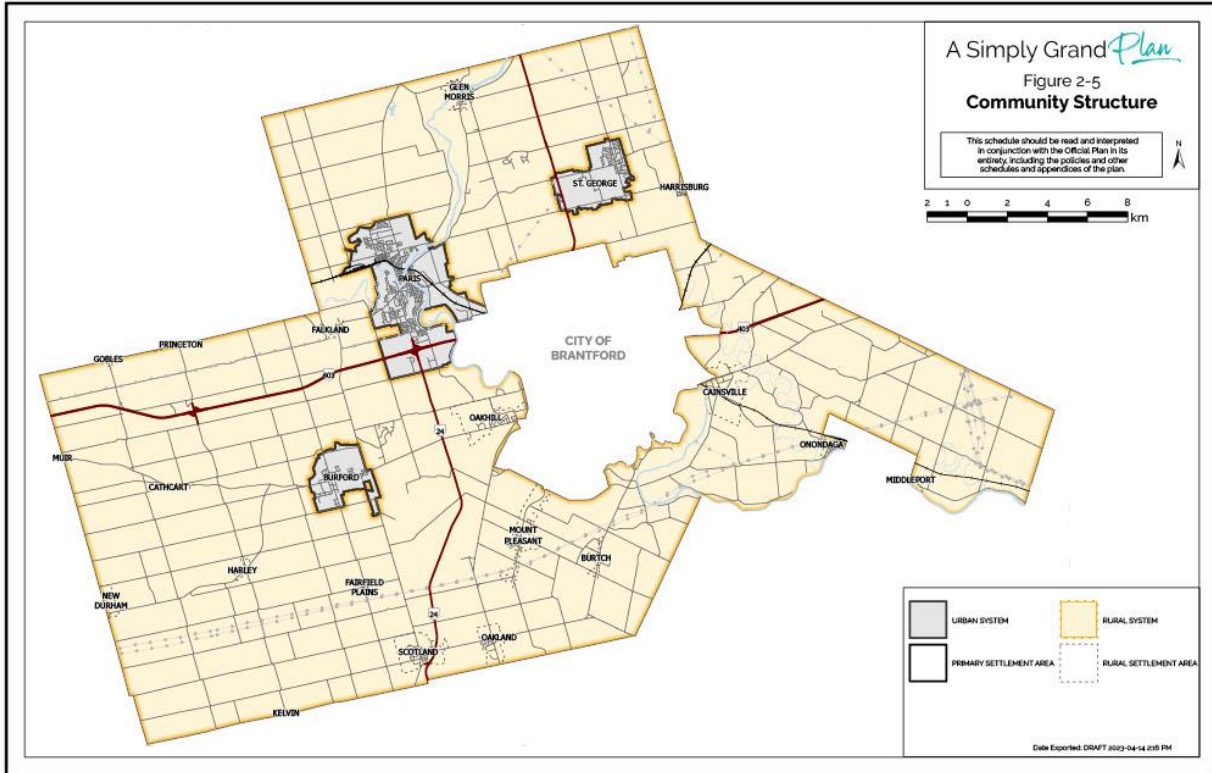
Policy Statement. Rural settlement areas with partial servicing and community facilities are anticipated to accommodate some limited growth, based on existing servicing capacity and subject to further servicing review. In terms of a hierarchy, these areas with existing partial servicing are considered a higher priority for growth than the villages, hamlets and the remaining rural area. The urban land needs assessment is based on existing and planned fully-serviced lands within the Primary Settlement Area and includes Paris, St. George and Burford. It is important to note that while Burford is currently within the Urban System without proper implementation, and future municipal servicing (water/wastewater) is required to support a significant increase in future growth. Over the short term (i.e., prior to 2031), Burford is anticipated to accommodate a small share of the County's housing within the B.U.A. of the Burford Settlement Area. Growth within the D.G.A. in Burford will require municipal servicing.

Growth within the Rural System is to be compatible with the rural setting and provide opportunities to support the rural base.

Figures 2-5 and 2-6 summarize the proposed Urban and Rural System.



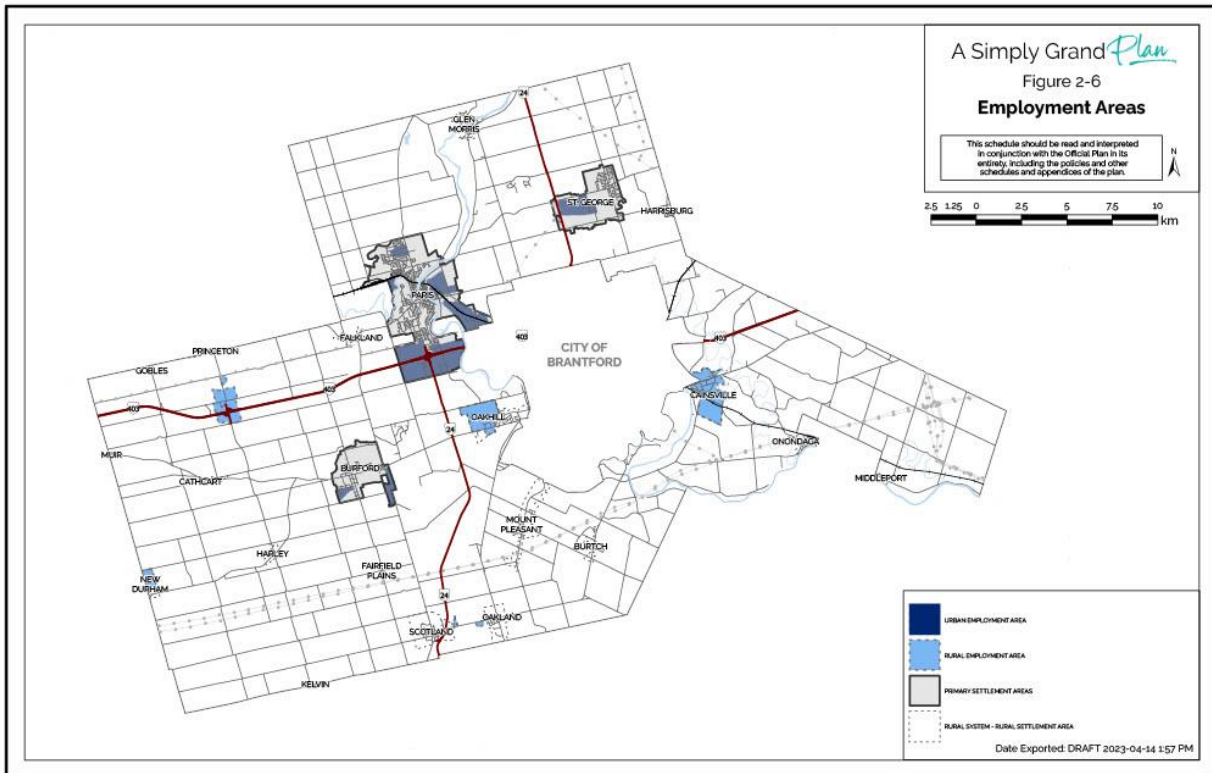
Figure 2-5
County of Brant
Proposed Urban and Rural System



Source: County of Brant, Draft New Official Plan.



Figure 2-6
County of Brant
Proposed Urban and Rural System
Employment Areas



Source: County of Brant, Draft New Official Plan.

2.1.4.1 Rural System Components

It is recommended that the County consider providing a distinction in the O.P. between the Rural System and the Urban System on the basis of servicing and the amount of growth to be accommodated within the Rural System. Furthermore, the County's hamlets are an integral component of the County's rural area.

The Rural System is proposed to include the following components in the County's new O.P.:

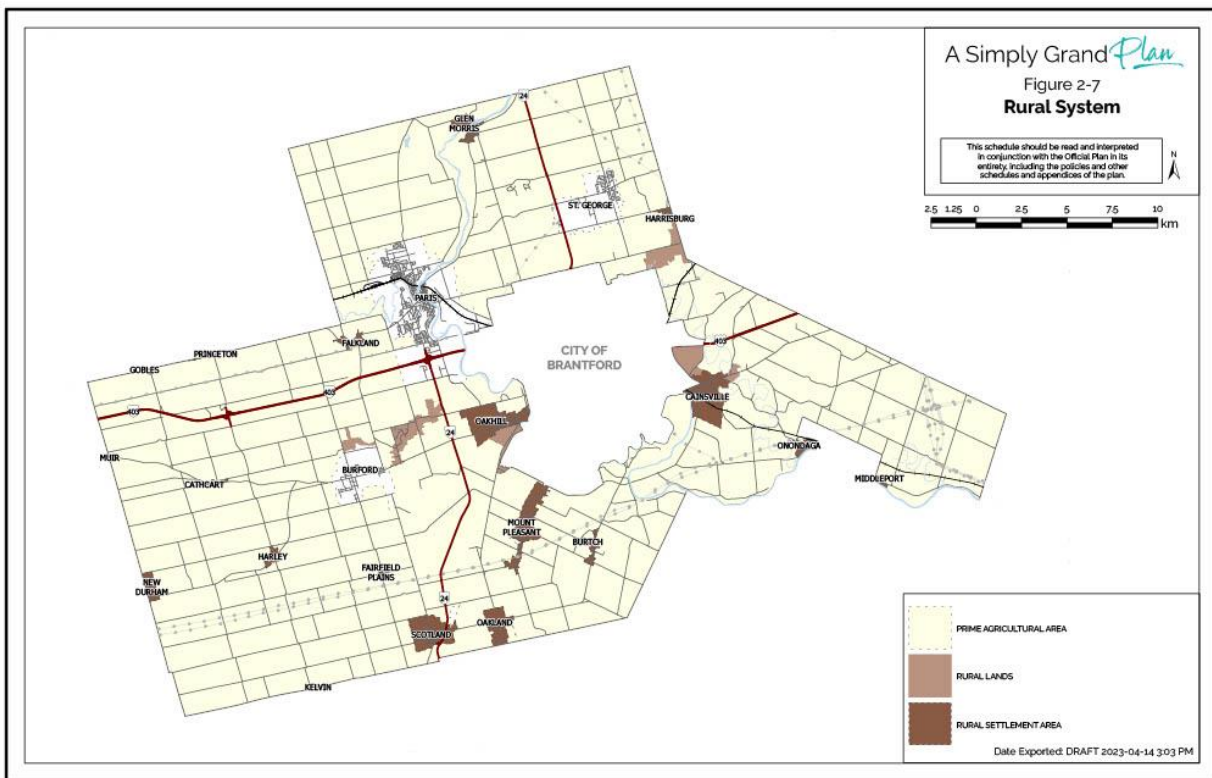
- Rural Settlement Areas;
- Rural Employment Area (General Employment);
- Rural Lands;



- Prime Agriculture Holding (Overlay);
- Prime Agriculture;
- Parks and Open Space;
- County Natural Heritage System Designation;
- Erosion Hazard Lands and Flooding Hazards Designation.

Figure 2-7 provides the proposed Rural System, including rural settlement areas. Refer to Figure 2-6 for Employment Areas.

Figure 2-7
County of Brant
Proposed Rural System



Source: County of Brant, Draft New Official Plan.

2.1.4.2 Urban System Components

The Paris, St. George and Burford Settlement Areas are primary growth settlement areas. These settlement areas provide full services, a delineated B.U.A., a



concentration of public facilities and a range of land uses. These primary growth settlements comprise the core settlements within the Urban System.

Within the Urban System, the following are settlement areas:

- Primary settlement areas – subject to an L.N.A.

Within the Urban System, the following are the designations:

- Neighbourhood designation.
- Community Corridor designation.
- Community Node designation.
- Parks and Open Space designation.
- Employment Areas:
 - Prestige Employment designation (Highway 403);
 - General Employment designation.
- Natural Heritage System and Natural Hazards:
 - County Natural Heritage System designation;
 - Erosion Hazard Lands and Flooding Hazards designation.

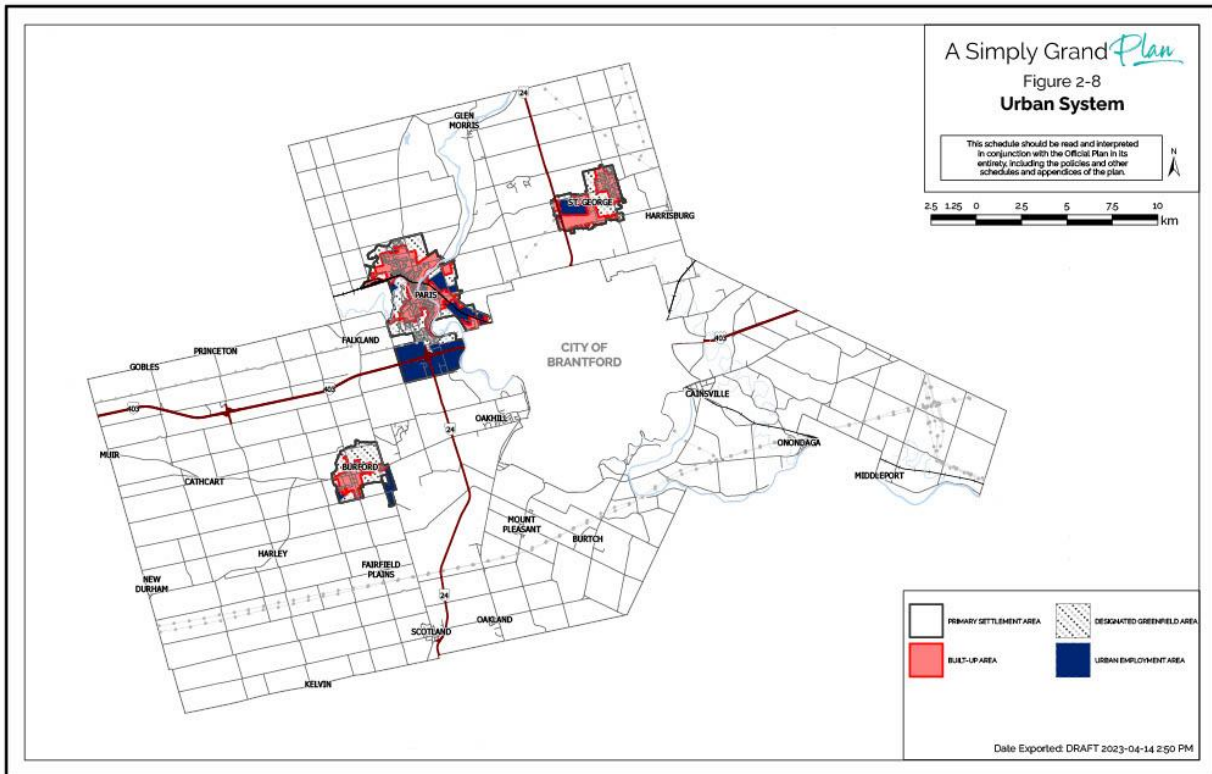
Within the Urban System, the hierarchy would further be broken down with respect to growth opportunities, as follows:

- Designated Greenfield Area
- Built-Up Area (within the Built Boundary).; and
- Urban Employment Areas.

Figure 2-8 provides a map of the proposed Primary Settlement Areas within the Urban System.



Figure 2-8
County of Brant
Proposed Urban System – Primary Settlement Areas



Source: County of Brant, Draft New Official Plan.

2.2 County-Wide Population and Housing Growth Forecast

2.2.1 Population and Housing Trends

As part of this Addendum, the County's population and housing forecasts were reviewed in light of the 2021 Census, recent trends, as well as key market indicators. Figures 2-1 through 2-5 summarize the review of the County-wide population and housing forecasts. Key highlights include:

Census Review

- Statistics Canada revised the 2016 population estimate for the County of Brant, reflecting recent municipal boundary changes. The revised population of the County of Brant in 2016 (including Census undercount) is 36,700 which is 1,100



lower than the County's population in 2016 prior to the 2017 annexation by the City of Brantford. This adjustment includes approximately 420 housing units, primarily within the Tutela Heights community area that is now within the municipal boundary of the City of Brantford.

- Based on the results of the 2021 Census, the County of Brant M.C.R. population and housing growth forecasts are tracking closely to the Census, as summarized in Figure 2-1.
 - The population estimate for mid-2021 in the County of Brant M.C.R. Draft Report was approximately 40,500, which was slightly lower (approximately 0.4%) compared to the 2021 Census (40,700), as summarized in Figure 2-1.
 - The 2021 County of Brant M.C.R. Draft Report estimated housing by 2021 at 14,500 units. The 2021 Census came in approximately 170 households lower than the M.C.R., which can be partially attributed to the change in the rural area due to the municipal boundary change as previously discussed.

Housing Trends

- As summarized in Figure 2-2, a review of recent residential building activity in the County, particularly in Paris, indicates a need to upwardly adjust the population and housing estimates for 2026 to reflect a surge in residential building permit activity.
- Most of the housing growth in the County in the last five years has occurred in Paris; approximately 88% of the County's building permits issued for new units during the 2018 to 2022 period has been accommodated in Paris, as summarized in Figure 2-4. The 2021 County of Brant M.C.R. forecast anticipates a more balanced allocation of housing growth throughout the County over the long term, including a greater share of housing allocated to St. George and the County's rural settlement areas. The County's M.C.R. growth forecast anticipates that over the 2021 to 2051 period, Paris will accommodate 55% of the County's housing growth.
- As summarized in Figure 2-5, residential building permit activity in the County is undergoing a shift to higher density housing, in particular, an increase in the share of medium-density housing. It is important to note that this is consistent with the 2021 County of Brant M.C.R. Draft Report which anticipates housing



growth with a mix of 64% low-density housing units, 13% medium-density housing units and 23% high-density units. It is anticipated that affordability will continue to put pressure on a broader range of housing options in the market.

- Key market indicators signify a slow down in housing activity over the short term. Figure 2-6 summarizes the relationship between sales activity and new listings within the County of Brant which provides a general indication of the near-term supply of ownership housing available and on the market at a given time. A sales to new listings ratio of 0.6 or higher indicates a seller’s market, a ratio between 0.4 and 0.6 indicates a balanced market, and a ratio below 0.4 indicates a buyer’s market. The re-sale market in Brantford/Brant has been steadily declining from an extreme seller’s market that started in Q3 2020 following the onset of the coronavirus disease (COVID-19) pandemic. Since Q2 2022, the housing market in Brantford/Brant approached a buyer’s market. Under more balanced conditions, market power is rotating back to the buyer. Over the past year housing buyers have faced less competition as the pool of potential buyers is shrinking given rising mortgage interest rates.

Figure 2-1
County of Brant
County of Brant M.C.R. Draft Report and 2021 Census Comparison

Census vs. M.C.R. Draft Report	Population ^[1]	Households					P.P.U.
		Low	Medium	High	Other	Total	
2021 Census	40,700	12,585	965	725	55	14,330	2.840
M.C.R. Draft Report	40,500	12,775	1,035	645	50	14,500	2.792
Census vs. M.C.R.	200	(190)	(70)	80	5	(170)	0.05

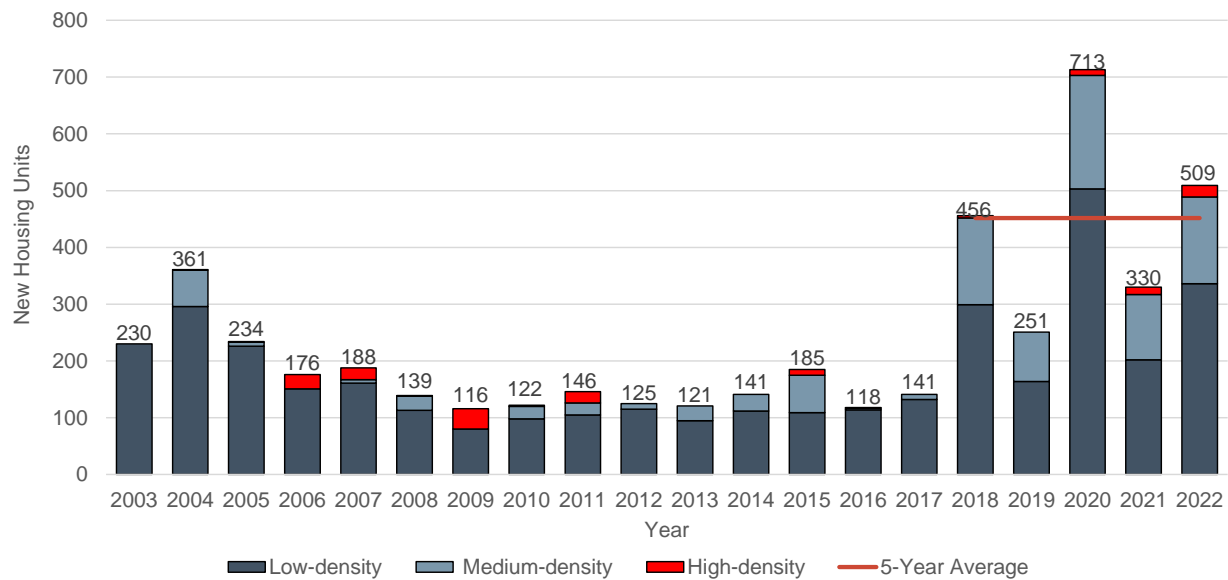
^[1] Includes the Census undercount estimated at approximately 3%.

Note: Population including the Census undercount has been rounded.

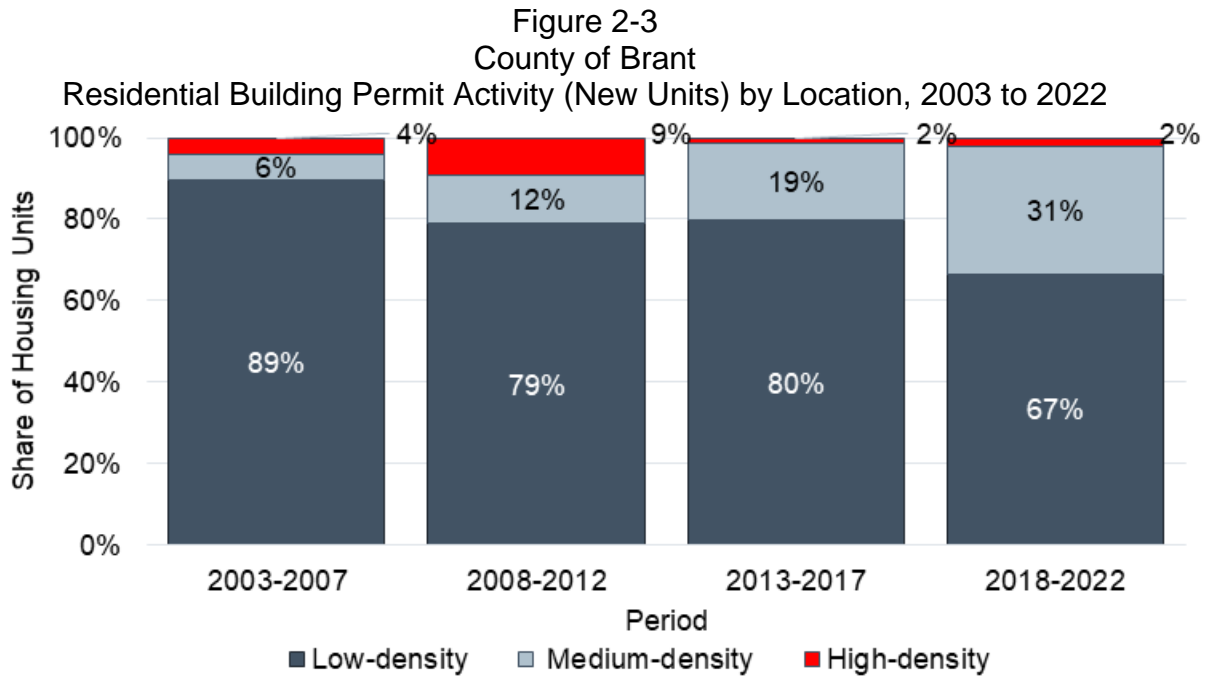
Source: Derived from Statistics Canada Census 2021 and County of Brant M.C.R. Draft Report, July 2021 by Watson & Associates Economists Ltd., 2023.



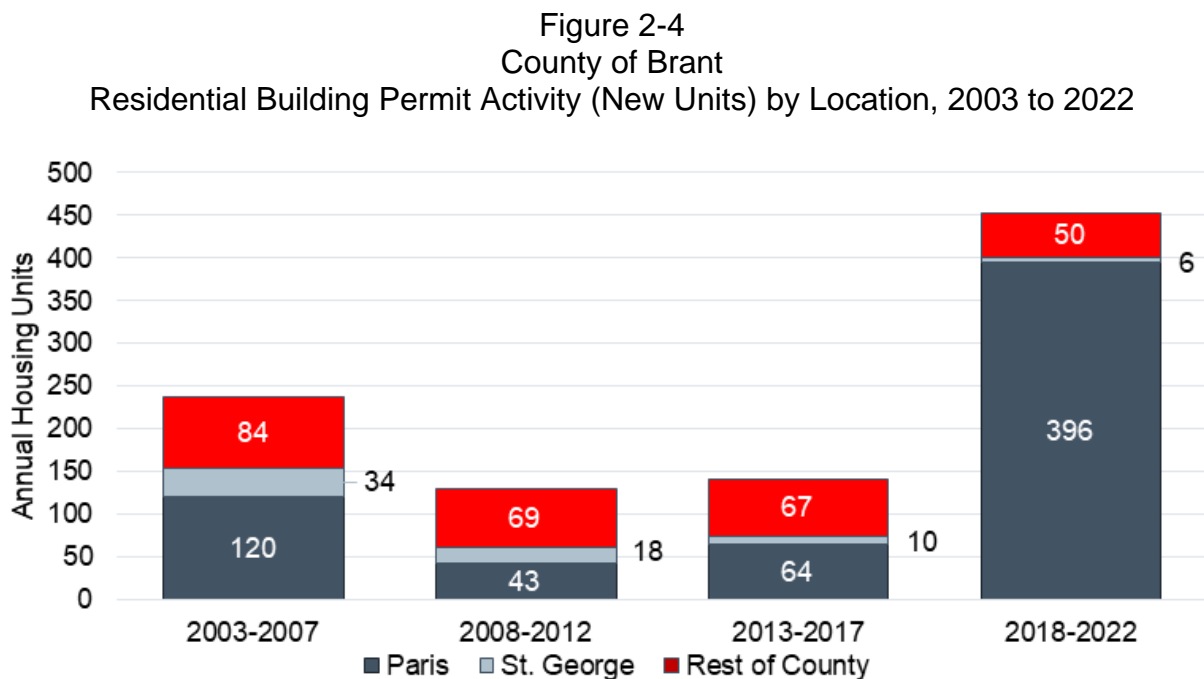
Figure 2-2
County of Brant
Residential Building Permit Activity (New Units) by Location, 2003 to 2022



Source: Derived from County of Brant Residential Building Permit Activity by Watson & Associates Economists Ltd.



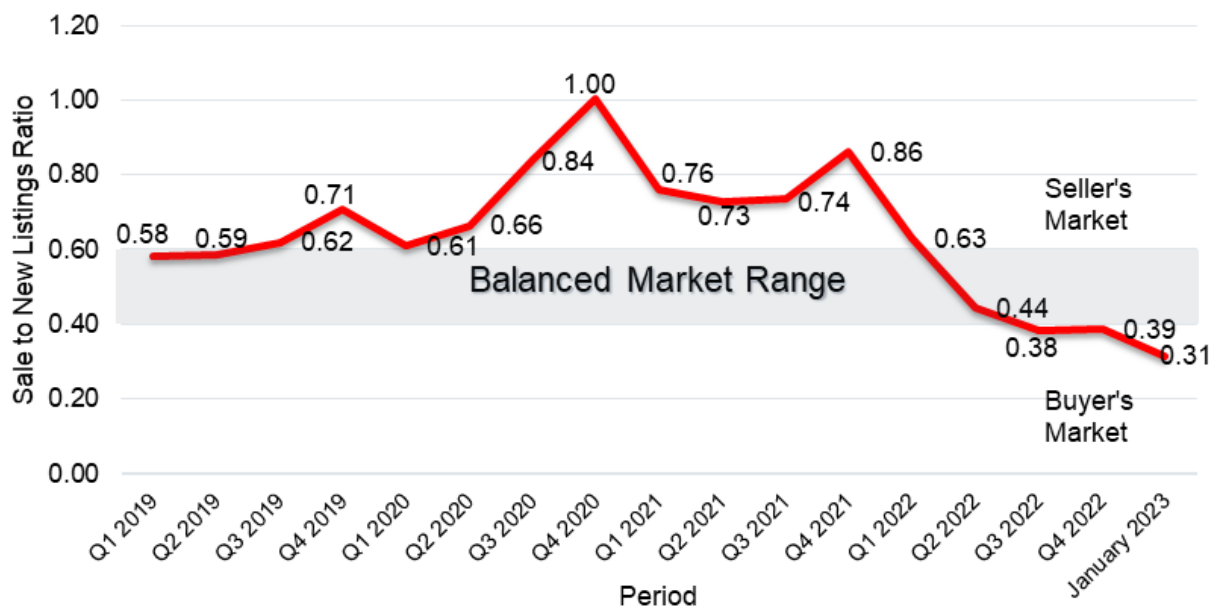
Source: Derived from County of Brant Residential Building Permit Activity by Watson & Associates Economists Ltd., 2023.



Source: Derived from County of Brant Residential Building Permit Activity by Watson & Associates Economists Ltd., 2023.



Figure 2-5
Brantford/Brant Area
Quarterly Sales to Listings Ratio, Q1 2019 to January 2023



Source: Derived from Brantford Real Estate Board statistics by Watson & Associates Economists Ltd., 2023.

2.2.2 Population and Housing Forecast to 2051

Over the long term, the County's forecast, as set out in Schedule 3 of the Growth Plan, 2019, is the recommended long-term minimum growth forecast for the County of Brant. It is important to recognize that this minimum growth forecast will support a robust level of population and housing, supporting an annual population growth rate of 1.2% over the 2021 to 2051 period. Population growth is anticipated to be driven by migration at much higher levels relative to the past 20 years in the County of Brant.

In accordance with the analysis provided in the 2021 County of Brant M.C.R. Draft Report (refer to subsection 3.3.5), as well as our review of recent population and housing growth trends, summarized herein in subsection 2.2.1, it is not recommended that the County's 2051 population forecast is increased beyond 59,000 people, as per Schedule 3 of the Growth Plan, 2019. It is noted, however, that adjustments have been made to the forecast over the short term to reflect the results of the 2021 Census and recent County of Brant residential building permit activity. Figures 2-6 through 2-8 provide a summary of the County of Brant population and housing forecasts.



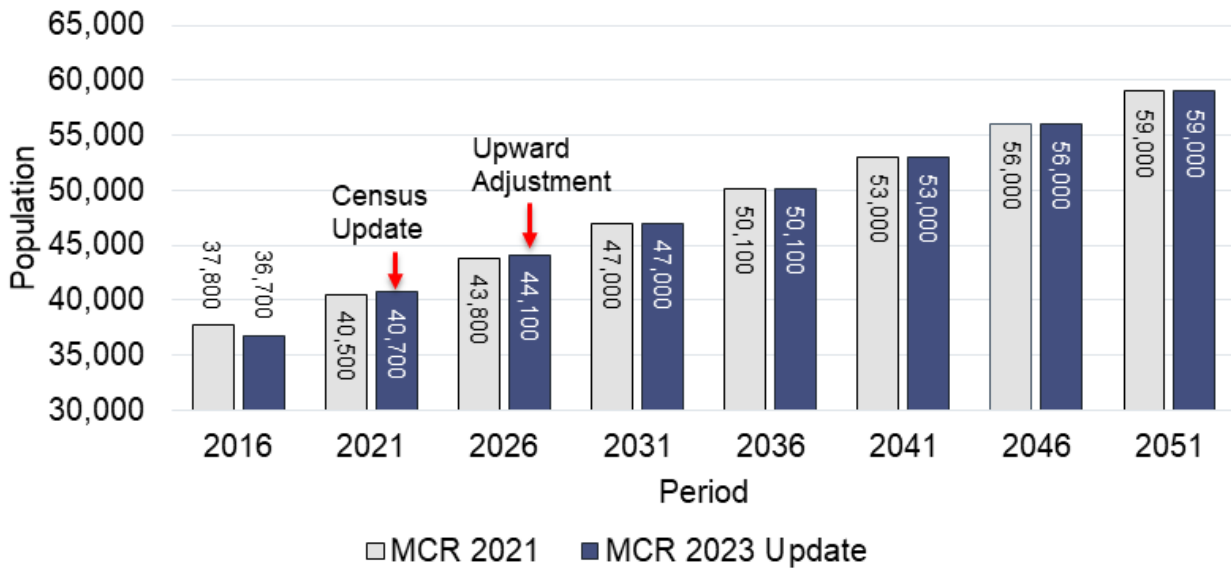
Provided below are key highlights of the County of Brant population and housing forecasts to 2051:

- An adjustment to the population and housing forecasts has been made to 2021 to reflect the 2021 Census and an upward adjustment has been made to 2026 to reflect the recent surge in residential building permit activity, as identified in the series of figures below.
- Figures 2-6 and 2-7 summarize the County of Brant's total population growth forecast over the 2021 to 2051 period relative to historical population between 2001 and 2021. This represents an increase of approximately 18,200 persons between 2021 and 2051, or an average annual population growth rate of 1.2% during this time period. This is considered a minimum population forecast and the County will need to regularly monitor development activity relative to County phasing plans and municipal servicing capacity (water/wastewater servicing), including the Paris Water/Wastewater Servicing Allocation Policy and O.P.A. 18 Phasing Plan for St. George.
- The population and housing forecast assumes a very high rate of migration. As summarized in Figure 2-8, over the forecast period the County of Brant is anticipated to accommodate an average of 8,300 new migrants annually to 2051 (including international, inter-provincial and intra-provincial). This is a significant increase in migration relative to historical levels over the past 20 years.
- As summarized in Figure 2-10, over the 30-year forecast period, the County is anticipated to increase its average annual rate of housing units to approximately 256 housing units annually, compared to approximately 165 housing units per year over the 2001 to 2021 period. This long-term housing growth assumption remains unchanged from the 2021 County of Brant M.C.R. Draft Report. The upward adjustment of the short-term housing forecast as part of the M.C.R. 2023 Update addresses the recent surge in housing activity largely driven by the impacts of the COVID-19 pandemic and continues to recognize that future housing demand over the next three decades for the County of Brant is anticipated to remain at levels well above historical long-term annual averages.
- Over the long term, the annual rate of housing in the County of Brant is expected to moderate slightly below the 2016 to 2026 period, as summarized in Figure 2-10. As previously discussed, regional real estate trends data suggests that the housing market is cooling. Over the longer term, however, housing growth is expected to remain very robust driven by relatively higher federal immigration



targets, continued outward growth pressure from Greater Toronto Hamilton Area (G.T.H.A.) municipalities and a strengthening local economy.

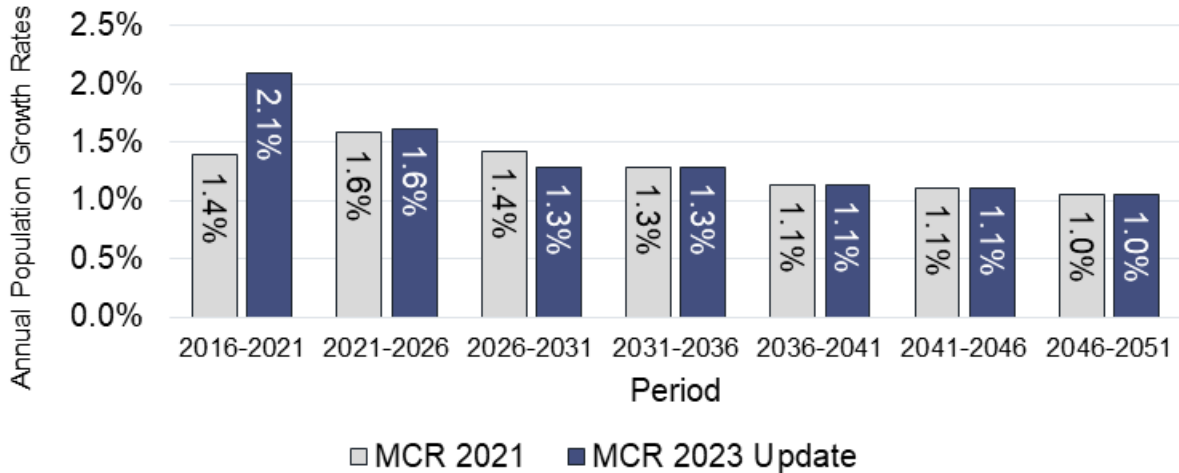
Figure 2-6
County of Brant
Population Growth Forecast to 2051



Note: Includes population Census undercount.
Source: Watson & Associates Economists Ltd., 2023.

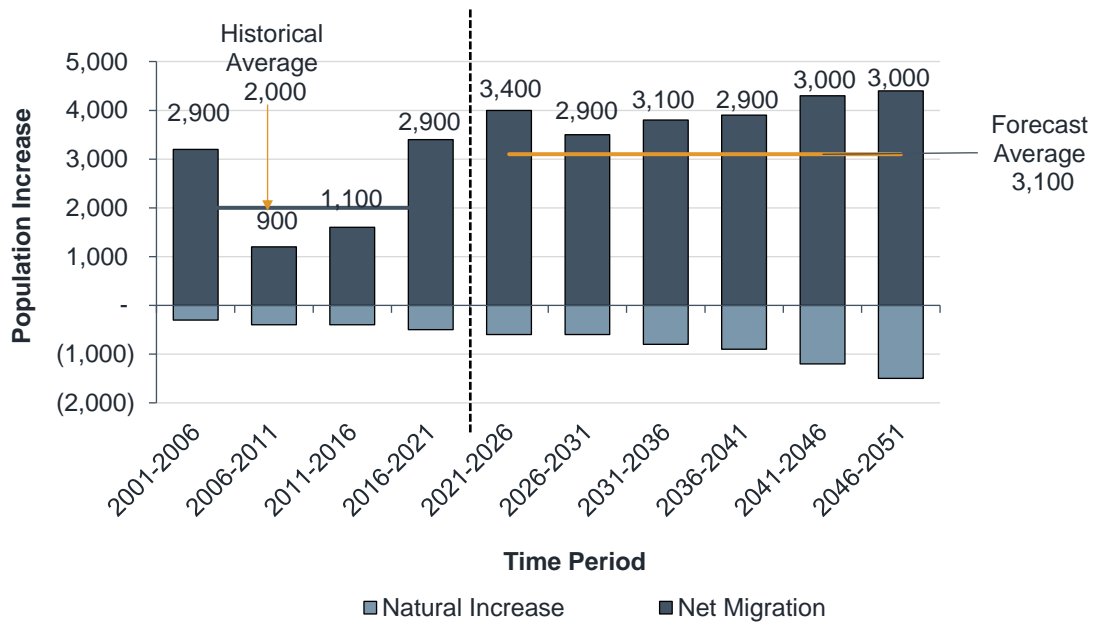


Figure 2-7
County of Brant
Annual Population Growth Rates to 2051



Source: Watson & Associates Economists Ltd., 2023.

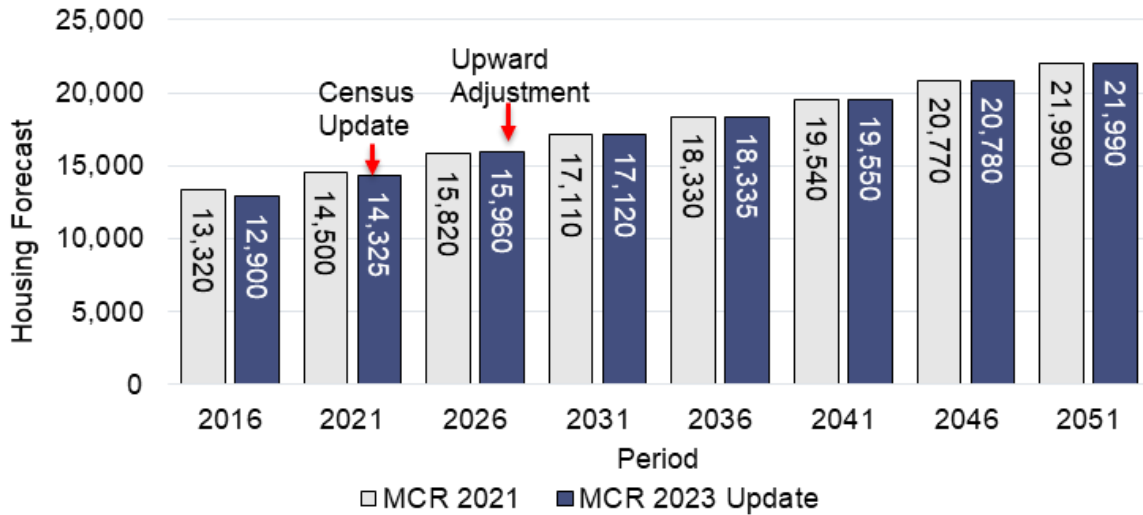
Figure 2-8
County of Brant
County of Brant Historical and Forecast Population Growth Associated with
Net Migration and Natural Increase, 2021 to 2051



Source: Watson & Associates Economists Ltd., 2023.

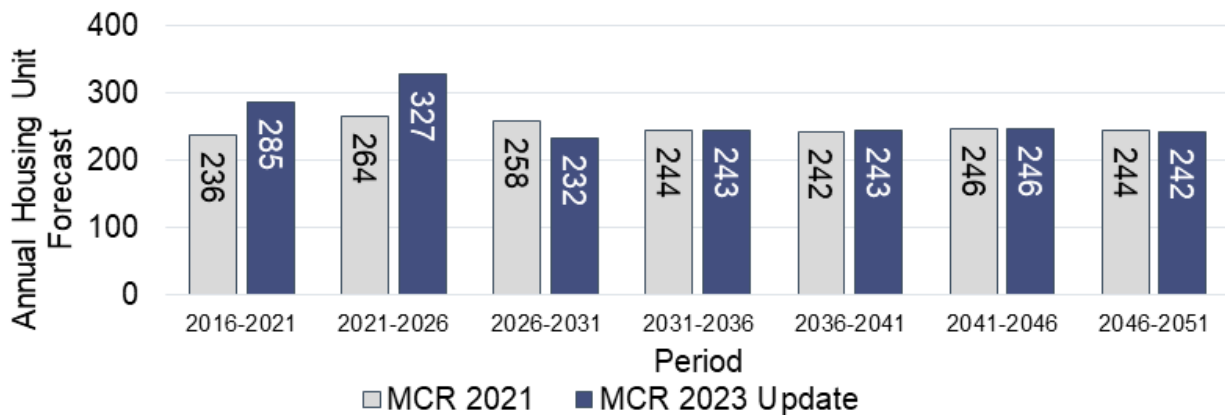


Figure 2-9
County of Brant
Housing Growth Forecast to 2051



Source: Watson & Associates Economists Ltd., 2023.

Figure 2-10
County of Brant
5-Year Average Annual Housing Growth Forecast to 2051



Source: Derived from Statistics Canada Census 2021 and the County of Brant M.C.R. Draft Report, July 2021 by Watson & Associates Economists Ltd., 2023.

Further details on the population and housing forecasts, including the housing forecast by housing type is provided in Appendix B.



2.3 Allocations by Settlement Areas within Urban and Rural Systems

2.3.1 Population and Housing Growth Forecasts to 2051 by Urban and Rural Area

Figures 2-11 through 2-16 summarize the population and housing forecasts to 2051 by area within the County. As previously discussed, Burford has been removed from the Rural System and categorized within the Urban System. The growth forecast for the Rural Area includes a further breakdown that identifies the growth anticipated for the rural settlement areas and the remaining rural area (agricultural area). Further details are provided in Appendix C.

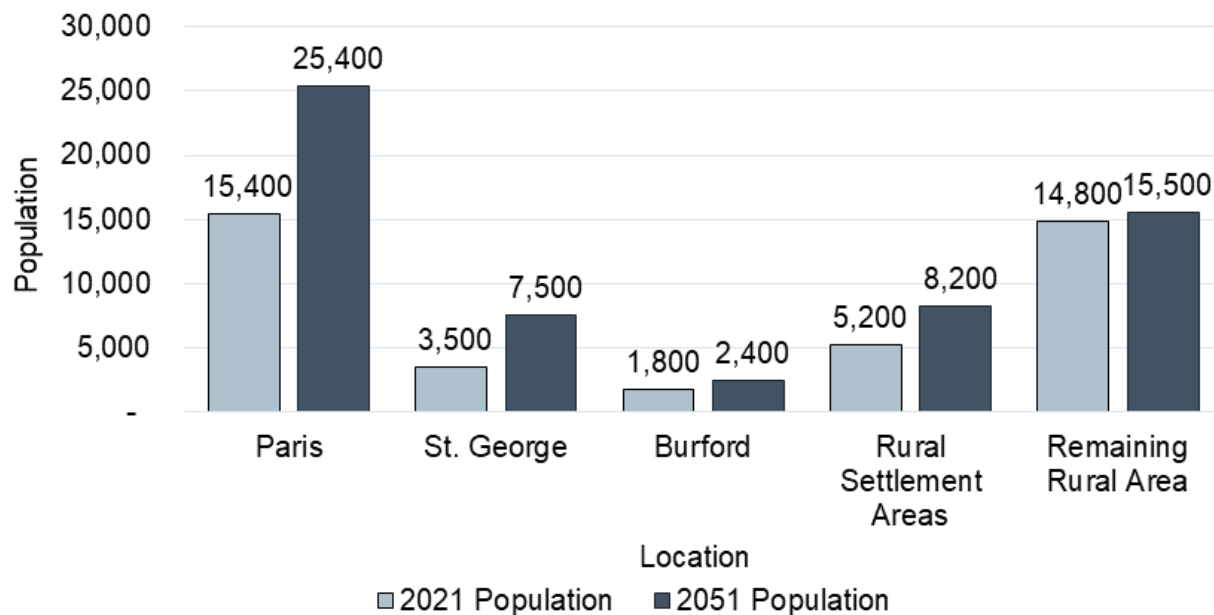
Key highlights include the following:

- The total population and housing forecasts by 2051 for Paris and St. George remain unchanged from the 2021 County of Brant M.C.R. Draft Report. Paris is anticipated to reach a population of 25,400 persons and 9,870 households by 2051, growing at an annual rate of 1.7%. St. George is anticipated to reach a population of 7,500 and 2,850 households by 2051, growing at an annual rate of 2.6%. It is important to recognize that the growth rates for Paris and St. George are higher than the average County of Brant growth rate of 1.2%.
- The population of the Rural Area has been adjusted from the 2021 County of Brant M.C.R. Draft Report to exclude the population of Burford. In addition, the Rural Area has been further broken down by rural settlement areas and the remaining rural areas. The rural settlement areas are anticipated to represent most of the growth within the Rural Area, with a growth rate exceeding the remaining rural area. Further details of the 2021 and 2051 population and housing forecasts for each of the County's rural settlement areas are provided in Appendix C.
- A growth forecast for Burford is identified in this Addendum. As summarized in Figure 2-11, Burford's population is anticipated to increase from 1,800 persons to 2,400 persons by 2051, growing at an annual rate of 1.0%.
- Figure 2-12 summarizes the County's population growth allocation by area over the 2021 to 2051 period. As summarized, Paris is anticipated to accommodate 55% of the County's population growth, followed by St. George at 22%. Rural



settlement areas are anticipated to accommodate a large portion of the County's population growth at 16%. The remaining rural area is anticipated to experience a slowdown in growth compared to historical trends, due to local and provincial policy direction, at an annual growth rate of 0.2%. Burford is anticipated to accommodate 3% of the County's population growth and most of this growth is expected to occur over the longer term due to existing municipal water and wastewater servicing constraints.

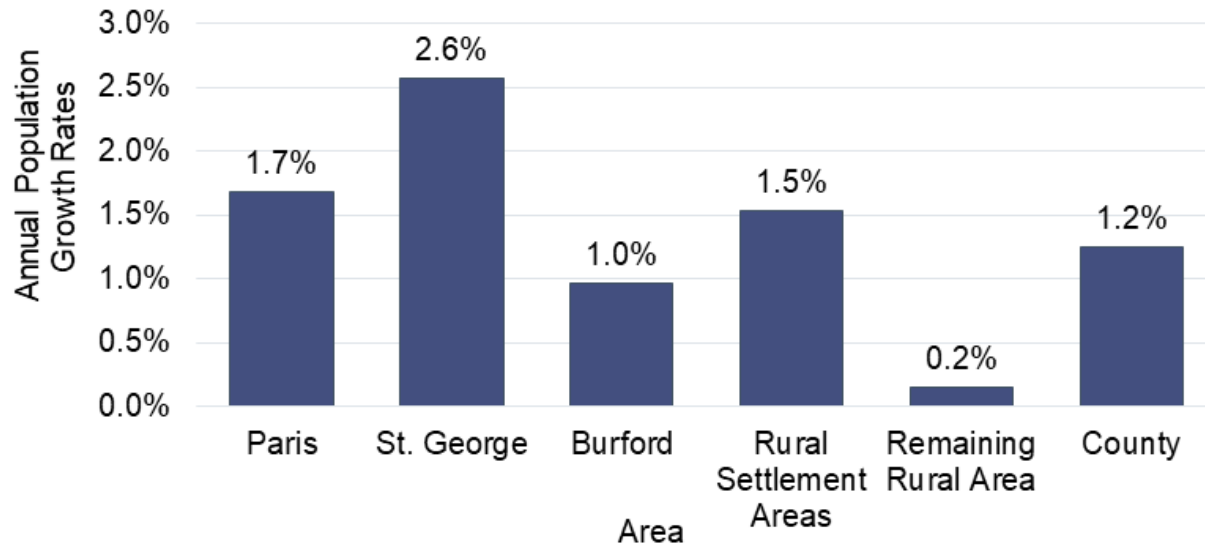
Figure 2-12
County of Brant
Population Forecast to 2051 by Location



Source: Watson & Associates Economists Ltd., 2023.



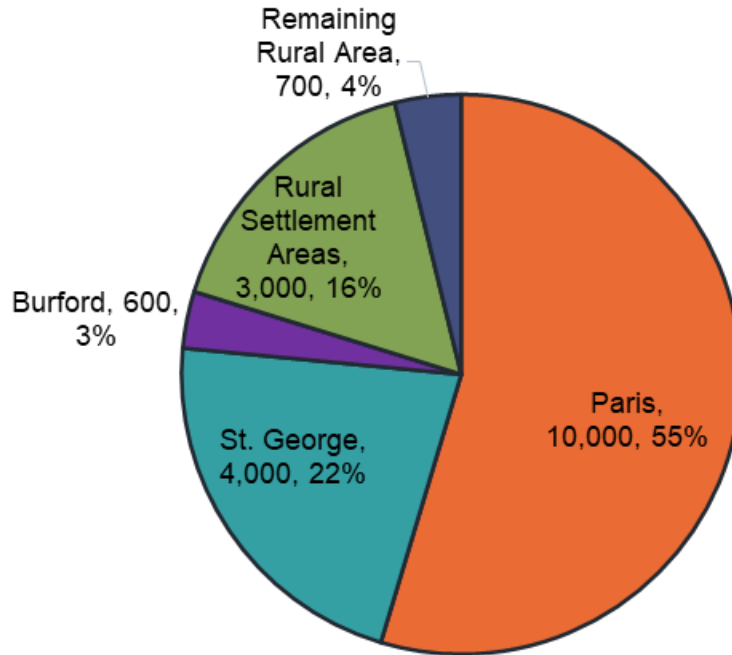
Figure 2-13
County of Brant
Annual Population Growth Rates to 2051



Source: Watson & Associates Economists Ltd., 2023.



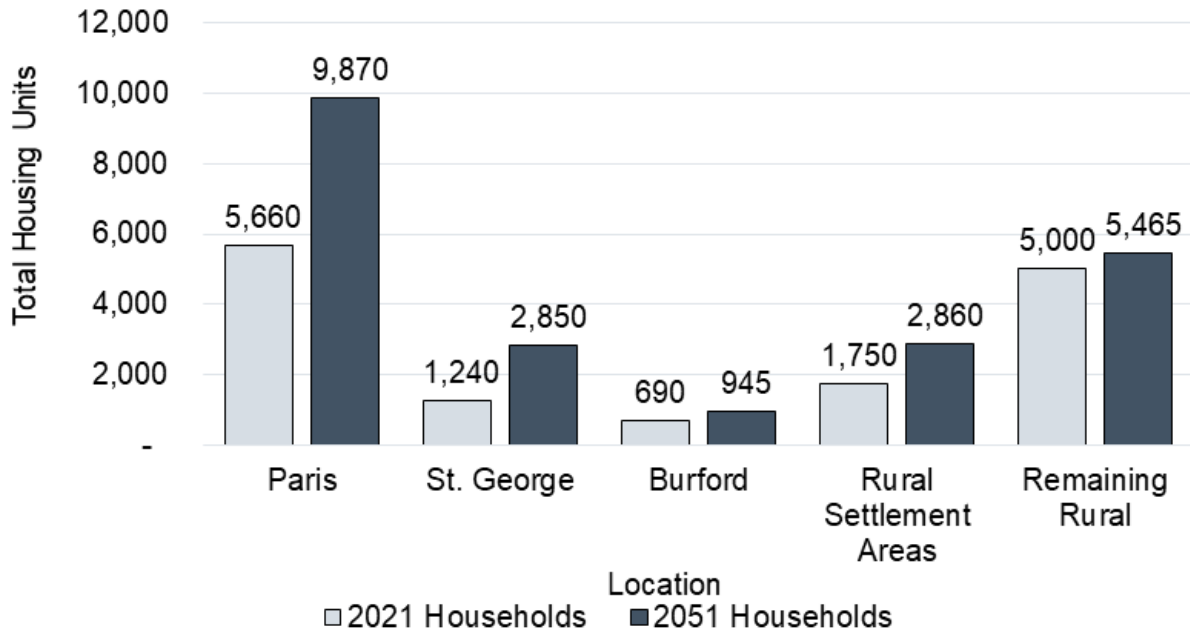
Figure 2-14
County of Brant
Population Growth Allocation, 2021 to 2051



Source: Watson & Associates Economists Ltd., 2023.

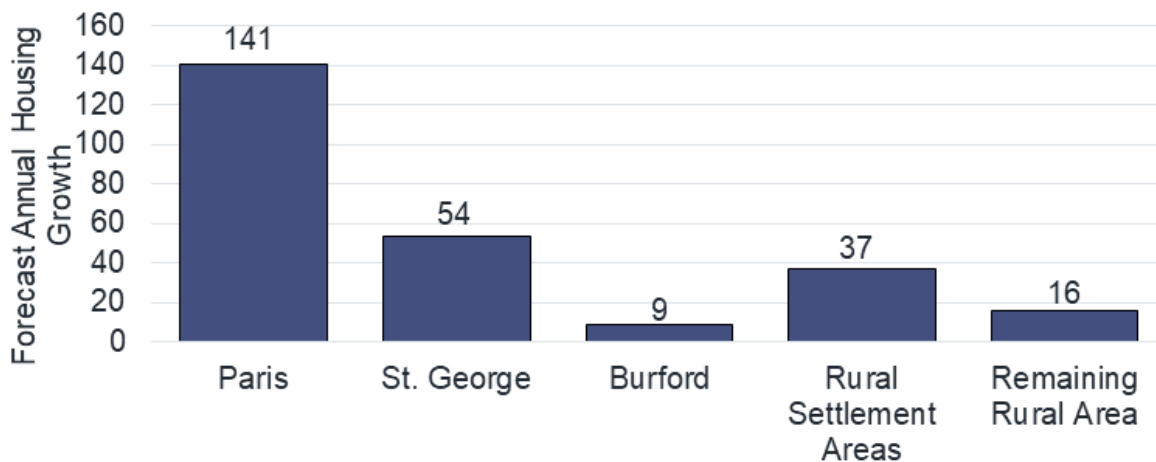


Figure 2-15
County of Brant
Housing Forecast to 2051 by Location



Source: Watson & Associates Economists Ltd., 2023.

Figure 2-16
County of Brant
Average Annual Housing Unit Growth, 2021 to 2051



Source: Watson & Associates Economists Ltd., 2023.



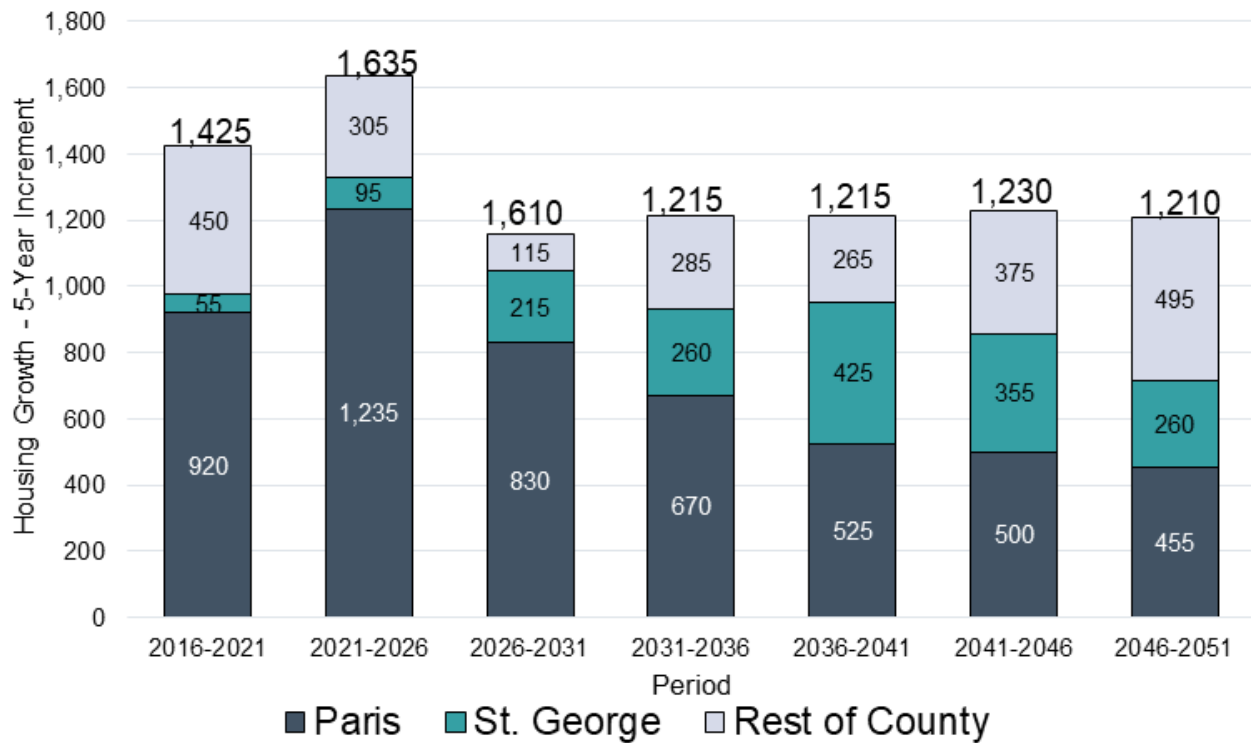
2.3.2 Population and Housing Growth Forecast by Timing

Figure 2-16 summarizes the County's housing forecast with a breakdown of Paris, St. George and Rest of County. While the County of Brant M.C.R. Draft Report's overall 2051 population and housing projections by area remain unchanged (with the exception of Burford being removed from the Rural Area), an adjustment has been made to the timing of growth by area to reflect the following:

- Over the short term (10-year period), Paris is anticipated to account for most of the housing growth in the County (approximately 74%), largely due to current municipal water and wastewater servicing constraints in St. George and Burford. Furthermore, the forecast and timing of growth has been updated to reflect the recent residential building permit surge in Paris.
- It is anticipated that, as servicing improvements are made to St. George and Burford, the share of housing growth in Paris will drop from 74% (2021 to 2031) to 44% over the 2031 to 2051 period. The rural settlement areas are also anticipated to accommodate an increasing share of the County's housing growth.



Figure 2-16
County of Brant
5-Year Housing Growth Forecast by Area



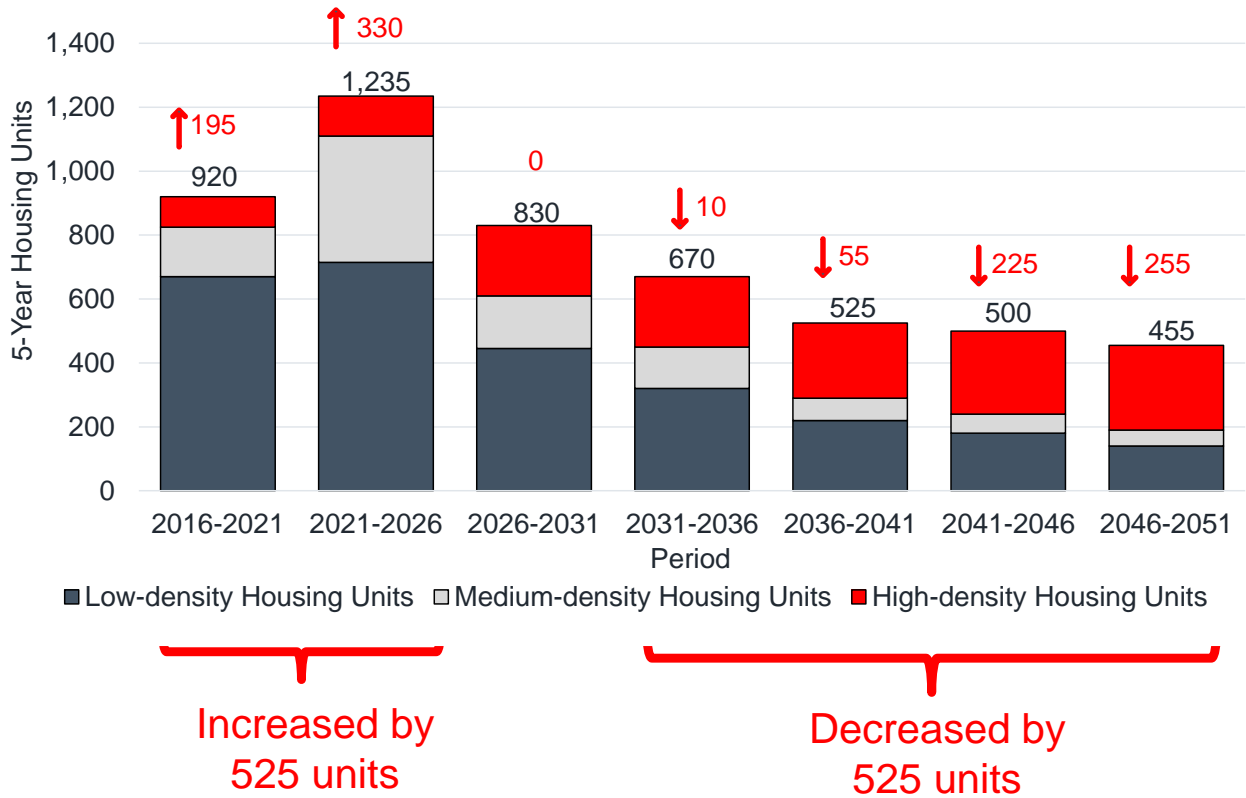
Source: Watson & Associates Economists Ltd., 2023.

2.3.2.1 Paris Primary Settlement Area

Based on a review of County of Brant residential building permit activity, the 2026 forecast in Paris has been upwardly adjusted to reflect the recent surge in residential building permit activity in Paris. An equivalent adjustment has been made to the housing growth increment over the 2031 to 2051 period in Paris, resulting in a reduction of annual housing growth post-2031. Figure 2-17 provides a summary of the Paris housing forecast in 5-year intervals. It is important to note that Paris is anticipated to reach a minimum population of 25,400 persons and 9,900 households by 2051 which remains the same as the forecast in the 2021 County of Brant M.C.R. Draft Report.



Figure 2-17
 County of Brant
 Paris Primary Settlement Area
 5-Year Housing Growth Forecast



Source: Watson & Associates Economists Ltd., 2023.

2.4 Community Area Land Needs

2.4.1.1 Population and Housing Forecast by Policy Area (B.U.A./D.G.A.) to 2051

The County has a current housing intensification target of 15% annually within the B.U.A. As discussed in the 2021 County of Brant M.C.R. Draft Report, the B.U.A. in Paris and, to a lesser extent, St. George and Burford offers an opportunity to accommodate a relatively wide range of housing options (low, medium, and high density). As well, active planning applications/approved developments suggest the County can achieve at least 48 units annually in the B.U.A. Accordingly, it is



recommended that the County target an intensification rate of 20% of housing growth within the B.U.A. The housing growth allocation to the B.U.A and the D.G.A. remains relatively unchanged compared to the 2021 County of Brant M.C.R. Draft Report. The only change is the inclusion of the Burford Settlement Area within the Urban System. As summarized in Figure 2-18, Burford’s housing intensification rate is forecast at 43%. The high intensification rate in Burford is largely due to servicing (water/wastewater) restrictions, which limit housing growth and direct growth to the B.U.A. over the short and medium term (i.e., to 2036). The inclusion of Burford in the Urban System does not have a significant impact on the County’s intensification rate which is forecast to maintain a 20% intensification rate (share of growth in the B.U.A.).

Figure 2-18
County of Brant
Housing Growth Allocation by Policy Area (B.U.A., D.G.A. and Rural)
2022 to 2051

Area	B.U.A.	D.G.A.	Rural	Total	B.U.A.	D.G.A.	Rural	Total
Paris	1,305	2,777	0	4,082	32%	68%	0%	100%
St. George	84	1,476	0	1,560	5%	95%	0%	100%
Burford	109	146	0	255	43%	57%	0%	100%
Total Urban System	1,498	4,399	0	5,897	25%	75%	0%	100%
Rural System	0	0	1,500	1,500	0%	0%	100%	0%
County-Wide	1,498	4,399	1,500	7,397	20%	62%	18%	100%
Shares	20%	59%	20%	100%	20%	62%	18%	100%

Note: Totals may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2023.

2.4.1.2 Community Area Land Needs to 2051

Figure 2-19 summarizes the Community Area land needs to 2051 for the settlement areas within the Urban System and includes Paris, St. George and Burford. As discussed, Burford has been added to the Urban System, and the Community Area Urban L.N.A. has been adjusted to include Burford. It is important to note that no changes have been made to Paris and St. George. The total housing and population growth increment and the intensification rate remain unchanged. As summarized in



Figure 2-19, all three Primary Settlement Areas are anticipated to have a surplus of Community Area land by 2051. Burford is expected to have a significant surplus of 347 hectares (ha) of Community Area lands. Overall, it is estimated that the County will have a surplus of 742 ha of urban Community Area lands.

Figure 2-19
County of Brant
Urban Community Area Land Needs to 2051

Community Area Land Needs	Calculation	Paris D.G.A.	St. George D.G.A.	Burford D.G.A.	Total D.G.A.
Total D.G.A. Population and Employment Forecast at 2051	A	12,100	5,100	600	17,800
People and Jobs Density/ gross ha	B	50	50	50	50
Community Area Land Requirement, gross ha	$C = A / B$	242	102	12	356
Total Community Area D.G.A. Land Area, gross ha	D	473	266	359	1,098
Community Area Land Surplus at 2051, gross ha	$E = D - C$	231	164	347	742

Source: Watson & Associates Economists Ltd., 2023.

Notwithstanding the identified Community Area land surplus for the County by 2051, the proposed Excess Lands policy in the new O.P. has been removed. Excess Lands are described on Schedule 2 – Designated Greenfield Areas – in the County of Brant’s draft new O.P. In accordance with subsection 2.2.1.6 of the Growth Plan, 2019, Excess Lands are designated developable urban lands that are not needed to accommodate forecast growth over the 2051 planning horizon.^[1] Upon further consideration, the proposed Excess Lands policy has been removed to ensure the County’s designated and developable Community Area lands are not unduly constrained in the event that greater demand for urban development is realized over the long-term horizon of the County’s O.P. within Paris, St. George and Burford. It is noted that the phasing and ultimate development approval of urban lands within the County’s Primary Settlement

^[1] In accordance with the Growth Plan, 2019, p. 70, Excess Lands are defined as vacant, unbuilt but developable lands within settlement areas but outside of delineated built-up areas that have been designated in an official plan for A Place to Grow | 70 Definitions development but are in excess of what is needed to accommodate forecast growth to the horizon of this Plan.



Areas will be subject to available municipal water and wastewater capacity within these areas.

2.4.1.3 Commercial Land Needs

As Burford has been added to the Urban System, Community Area commercial land requirements have been reviewed. Accordingly, it is anticipated that Burford will not reach a threshold requiring additional commercial lands. The existing designated commercial lands within the Burford Settlement Area contain approximately 50,000 sq.ft./4,600 sq.m of commercial building space and support approximately 28 sq.ft./2.6 sq.m per resident, which is reflective of a small urban centre accommodating the immediate needs of local residents. A key planning consideration for the County of Brant is to ensure the O.P. policies support a vibrant commercial core in Burford.

Further details on the commercial land needs requirements of Paris and St. George can be found in the 2021 County of Brant M.C.R. Draft Report.

2.5 Urban Community Area Housing Unit Potential Supply Analysis

As discussed, the County of Brant has a surplus of 742 ha of urban Community Area lands to accommodate the population and housing forecasts to 2051. Given to the amount of identified surplus urban Community Area lands by 2051, the County of Brant has a more than sufficient supply of designated lands to accommodate higher population, housing and employment growth over the long-term; exceeding the current forecasts. However, consideration of a higher long-term rate urban growth would subject to ongoing monitoring over the next several years as well as an examination of municipal water and wastewater servicing capacity.

Figure 2-20 provides an estimate of the potential for housing on designated Community Area land supply compared to the housing forecast over the 2021 to 2051 period in Paris. As summarized, the current designated land supply in Paris has the potential to accommodate an additional 2,690 housing units beyond the 2021 County of Brant M.C.R. 2051 forecast. The additional housing unit supply potential is estimated to up to



approximately 6,500 persons in Paris beyond the M.C.R. 2051 forecast allocation. The total buildout potential of Paris is estimated at 31,900 persons.^[1]

Figure 2-20
County of Brant
Paris Primary Settlement Area (includes B.U.A. and D.G.A.)
Total Housing Unit Supply Potential on Designated Community Area Lands

Status	Low-density Housing Units	Medium-density Housing Units	High-density Housing Units	Total Housing Units
Registered Unbuilt	625	184	0	809
Draft Approved	1,561	722	542	2,825
Proposed Units on Designated Lands	0	0	371	371
Other Potential on Vacant D.G.A. Lands	468	0	0	468
Intensification Potential on Vacant Lands with No Application (low range)	0	0	1,739	1,739
Total Housing Unit Supply Potential	2,654	906	2,652	6,212
Building Permits Issued Not Included in Census	404	265	24	693
Total Supply, Adjusted for Building Permits	3,058	1,171	2,676	6,905
Housing Unit Forecast, 2021 to 2051	2,020	870	1,325	4,215
Housing Unit Supply Potential vs. Housing Forecast, 2021 to 2051	1,038	301	1,351	2,690

Note: Housing unit supply potential excludes proposed developments that involve a re-designation to accommodate residential uses (e.g., Employment Area conversions).

Source: Watson & Associates Economists Ltd., based on housing supply information from the County of Brant as of January 2023.

Figure 2-21 provides an estimate of the potential for housing on the designated Community Area land supply compared to the housing forecast over the 2021 to 2051 period in St. George. As summarized, the current designated land supply in St. George has the potential to accommodate an additional 4,000 housing units beyond the 2021 County of Brant M.C.R. 2051 forecast. The additional housing unit supply potential is estimated to up to approximately 9,200 persons in St. George beyond the M.C.R. 2051

^[1] The estimate of buildout is high-level estimate and does not factor in decline of population in existing households beyond 2051.



forecast allocation. The total buildout potential of St. George is estimated at 16,700 persons. [1]

Figure 2-21
County of Brant
St. George Primary Settlement Area
Total Housing Unit Supply Potential on Designated Community Area Lands

Status	Low-density Housing Units	Medium-density Housing Units	High-density Housing Units	Total Housing Units
Registered Unbuilt	0	0	0	0
Draft Approved	1,783	430	1,230	3,443
Proposed Units on Designated Lands	94	87	58	239
Other Potential on Vacant D.G.A. Lands	402	282	161	845
Intensification Potential on Vacant Lands with No Application (low range)	0	0	1,079	1,079
Total Housing Unit Supply Potential	2,279	799	2,528	5,606
Building Permits Issued Not Included in Census	8	0	0	8
Total Supply, Adjusted for Building Permits	2,287	799	2,528	5,614
Housing Unit Forecast, 2021 to 2051	985	135	490	1,610
Housing Unit Supply Potential vs. Housing Forecast, 2021 to 2051	1,302	664	2,038	4,004

Note: Housing unit supply potential excludes proposed developments that involve a re-designation to accommodate residential uses (e.g., proposed application on lands designated Park and Recreation Use).

Source: Watson & Associates Economists Ltd., based on housing supply information from the County of Brant as of January 2023.

In addition, to the housing unit supply potential in Paris and St. George, Burford offers a Community Area land surplus of approximately 347 ha, which has the potential to accommodate a significant amount of housing and population, although dependent upon servicing improvements.

[1] The estimate of buildout is high-level estimate and does not factor in decline of population in existing households beyond 2051.



2.6 Community Area Policy Considerations

2.6.1.1 *Community Structure*

The Growth Plan, 2019 requires most of the forecast growth be allocated to the areas with servicing (water/wastewater), i.e., Primary Settlement Areas. In the County's draft new O.P., Paris, St. George and Burford Settlement Areas are proposed as Primary Settlement Areas in accordance with the provincial urban settlement area policies. These settlement areas provide full services or may have the potential to provide services, a delineated B.U.A., a concentration of public facilities and a range of land uses. It is important to note that St. George and Burford currently have servicing (water/wastewater) constraints that are anticipated to influence the rate of growth over the planning horizon. Growth within St. George is subject to the County O.P.A. 18 Phasing Plan for St. George. Growth within Burford is confined to the B.U.A. until servicing improvements are made in Burford. It is anticipated that Burford will increase its rate of growth towards the later part of the forecast (i.e., 2036 to 2051).

Settlement areas in the County that do not have a built boundary and have only partial servicing/limited municipal servicing (e.g., Mount Pleasant, Oakhill and Oakland) or private servicing are grouped within the Rural System in accordance with the provincial L.N.A. Housing and population growth in the rural area is anticipated to be directed to rural settlement areas with partial servicing as community facilities are considered a priority in terms of growth allocation within the Rural System. Further details on the growth allocation by rural settlement area can be found in Appendix B, Figure C-6.

2.6.1.2 *Growth Monitoring and Phasing*

The County has a more than a sufficient potential supply of draft approved and registered unbuilt housing units to accommodate the housing forecast in Paris and St. George. Additional designated lands that are not draft approved or registered provide opportunities for the County of Brant to accommodate further housing growth, provided that required municipal services are made available. Again, it should be noted that the forecasts are considered minimums, and additional urban growth can be accommodated subject to market demand and municipal servicing requirements.

It is recommended that the County continue to monitor the population and housing forecasts with further consideration of how the County is tracking in terms of growth



allocations, density (people and jobs in the D.G.A.) and intensification targets. A proposed growth monitoring tool would be beneficial in understanding how to phase future urban development, particularly in Paris, St. George and Burford.

It is recommended that the identified Community Area land surplus in Paris, St. George and Burford remain designated as its current use, and that the County of Brant continue to phase growth according to infrastructure requirements. The significant surplus of designated Community Area lands provides the County with an opportunity to accommodate additional population and housing growth without expanding the urban boundaries of Paris, St. George and Burford for Community Area uses. A key policy objective should be to ensure that the County's population and housing growth is appropriately spread across the Primary Settlement Areas of Paris, St. George and Burford, and to a lesser extent the rural settlement areas.



Chapter 3

Employment Areas



3. Employment Areas

This section of the Addendum updates sections 6.1 (Employment Allocations by Area), 6.9 (Employment Area Overview), 6.11 (Urban Employment Area Land Needs) and 6.10 (Planning for Employment Areas) in Chapter 6 of the 2021 County of Brant M.C.R. Draft Report. It is important to note that the overall County employment forecast to 2051 and the supporting growth drivers and macro-trends factors remain unchanged from the 2021 M.C.R. Draft Report. The County of Brant is anticipated to reach an employment base of 26,000 employees by 2051, an incremental growth of 9,900 employees over the 2021 to 2051 period.

The core underlying assumptions of the 2021 M.C.R. Draft Report have been reviewed. Key changes are summarized below and include:

- A change to the community structure with the inclusion of the Burford Settlement Area as part of the County's Urban Employment Area land needs calculation. A summary of growth allocated to Burford is provided, as well as a calculation of the Employment Area land requirements for Burford to accommodate growth to 2051.
- The Urban Employment Area land need requirements have been modified to include a market contingency factor in response to increased industrial demand largely within the Paris Highway 403 Business Park.
- The Urban Employment Area has been updated based on the decision by County Council to convert one Employment Area site to non-Employment Area use in north Paris to accommodate a housing development (67 Woodslee Avenue). The site area of this conversion is approximately 4 ha and adds to the additional Urban Employment Area land requirement for Paris.
- This report provides a brief introduction to topics that will be explored in a forthcoming County of Brant Employment Area Strategy. The County of Brant Employment Area Strategy is intended to provide the County with a vision for each of its Employment Areas, as well as recommendations to ensure that the County is planning for the full potential of these Employment Areas.

The updated County Employment Allocations are provided in Appendix B.



3.1 Employment Area Overview

The County's Employment Area land supply is classified into two broad categories:

- Urban Employment Areas – Paris, St. George and Burford; and
- Rural Employment Areas – Cainsville Employment Area; Highway 25/Highway 403 Employment Area; Airport Employment Area; and New Durham Employment Area.

The Employment Areas in Burford – West Burford Employment Area and Bishopsgate Employment Area – are considered Urban Employment Areas. Similar to the Community Area lands in Burford, the Employment Area lands are not currently serviced. Over the planning horizon there is the potential that the County will add municipal servicing (water/wastewater) to Burford. The County of Brant Employment Area Strategy will explore the opportunities and vision for the Burford Employment Areas.

Figure 3-1 illustrates the location of Urban Employment Areas (identified in green) and Rural Employment Areas (identified in yellow).



Figure 3-1
County of Brant
Existing Designated Employment Areas

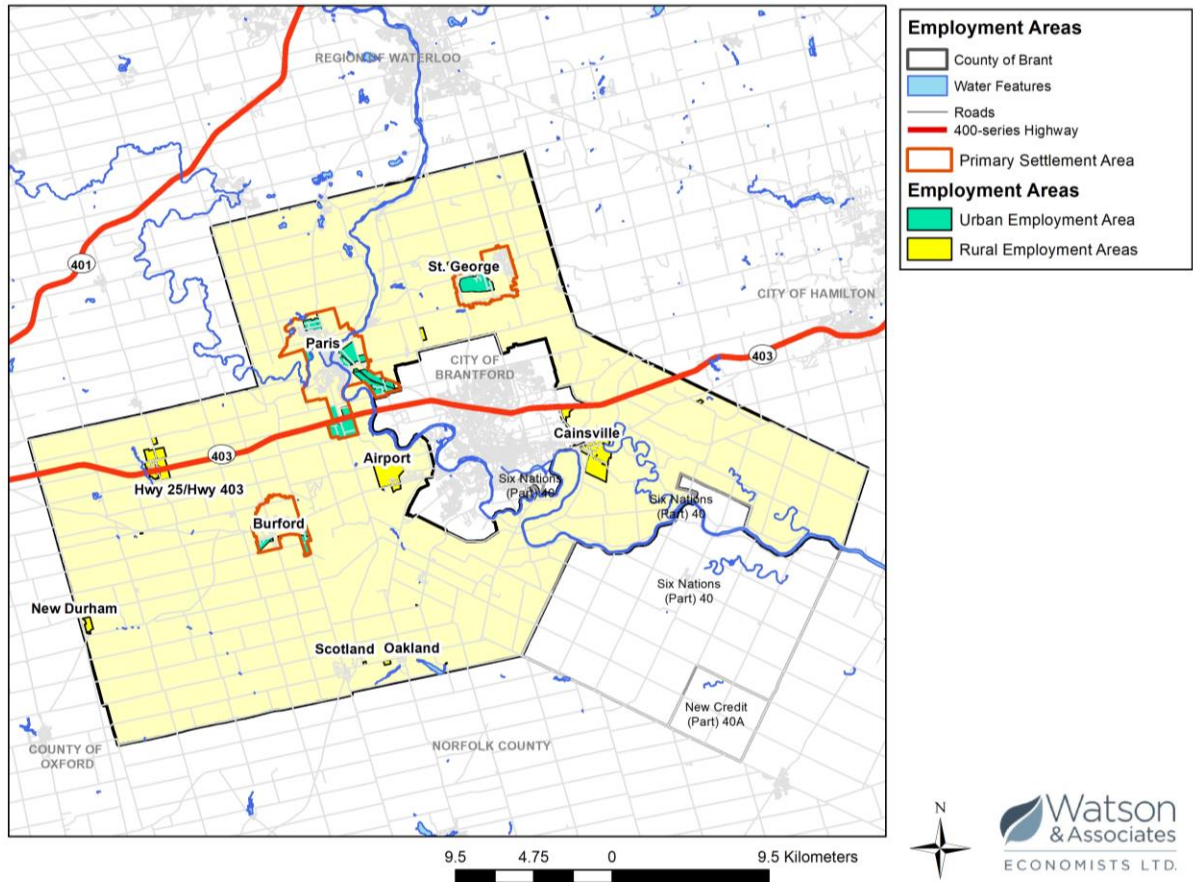
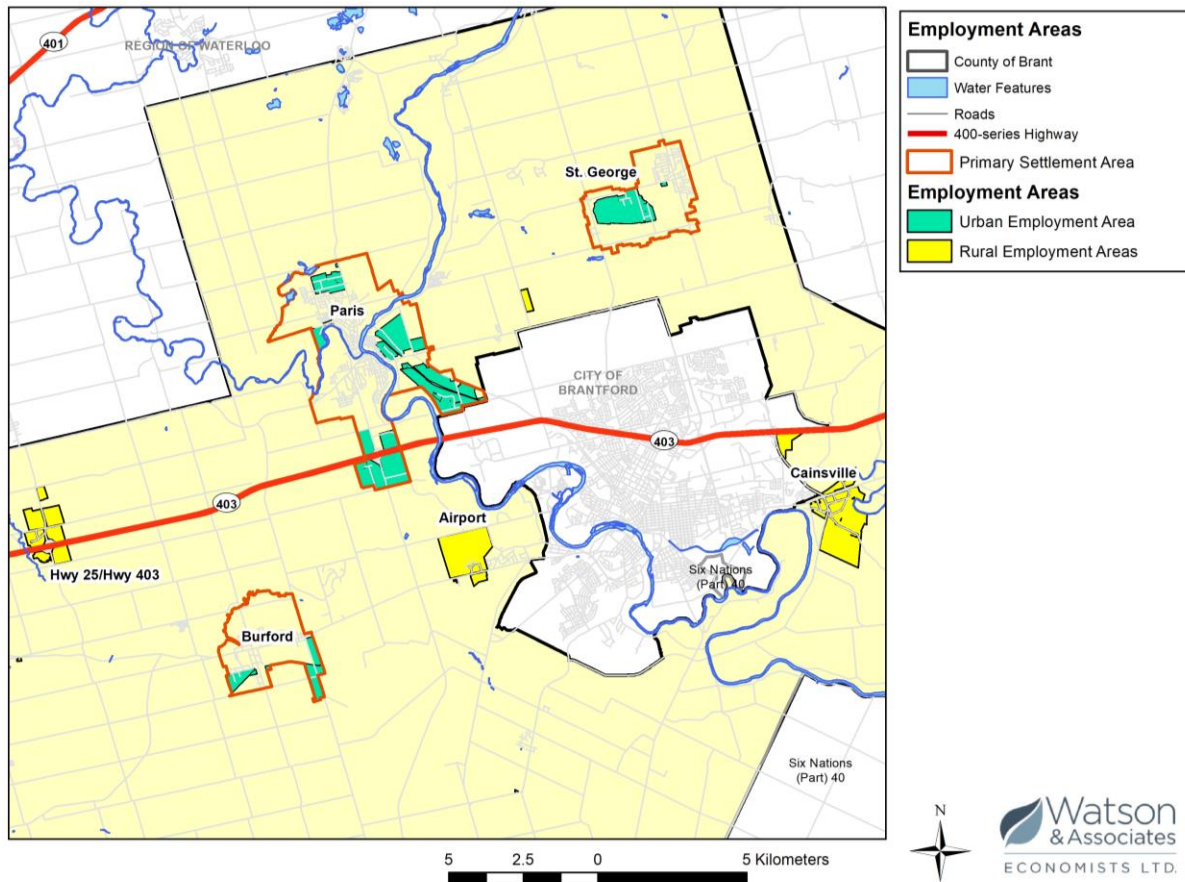


Figure 3-2 illustrates the location of Urban Employment Areas (identified in green) within the Primary Settlement Areas (identified in orange outline) of Paris, St. George and Burford. As illustrated, Paris is the only Primary Settlement Areas with an Employment Area that has direct access to a 400-series highway.



Figure 3-2
County of Brant
Existing Designated Employment Areas
Urban Employment Areas within Settlement Areas



As summarized in Figure 3-3, the County's Employment Areas accommodated approximately 6,600 employees in Urban Employment Areas and approximately 3,500 employees in Rural Employment Areas. The Employment Area density ranges from 8 jobs/ha in Burford Employment Areas to approximately 14 jobs/ha in Paris Employment Areas. As of 2021, the County had approximately 820 ha of developed Employment Area and, as summarized in Figure 3-4, approximately 53% of the developed lands are in urban Employment Areas, while 47% of the developed lands are in Rural Employment Areas.

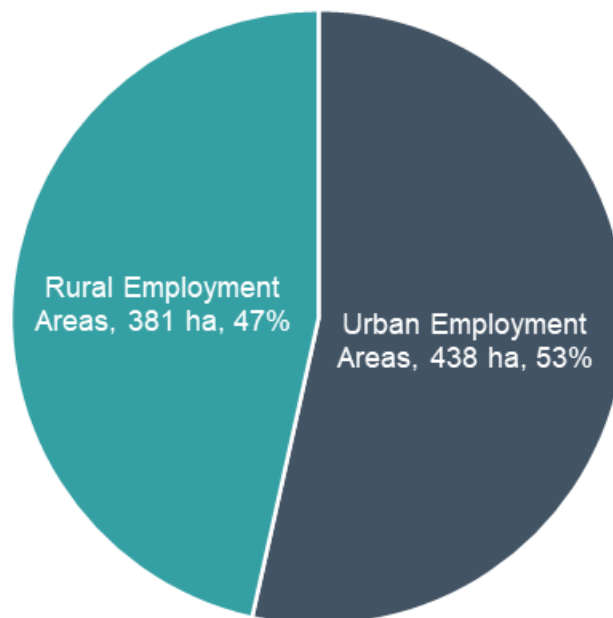


Figure 3-3
County of Brant
Summary of Developed Employment Areas, 2021

Employment Areas	2021 Developed (gross ha)	2021 Employment Estimates	Employment Density (jobs/gross ha)
Paris Employment Areas	339	4,700	14
St. George Employment Areas	49	560	11
Burford Employment Areas	50	400	8
Urban Employment Areas	438	5,660	13
Rural Employment Areas	381	3,460	9
Total Employment Areas	820	9,120	11

Source: Watson & Associates Economists Ltd., 2023.

Figure 3-4
County of Brant
Share of Developed Employment Area by Urban and Rural Areas, 2021



Source: Watson & Associates Economists Ltd., 2023.



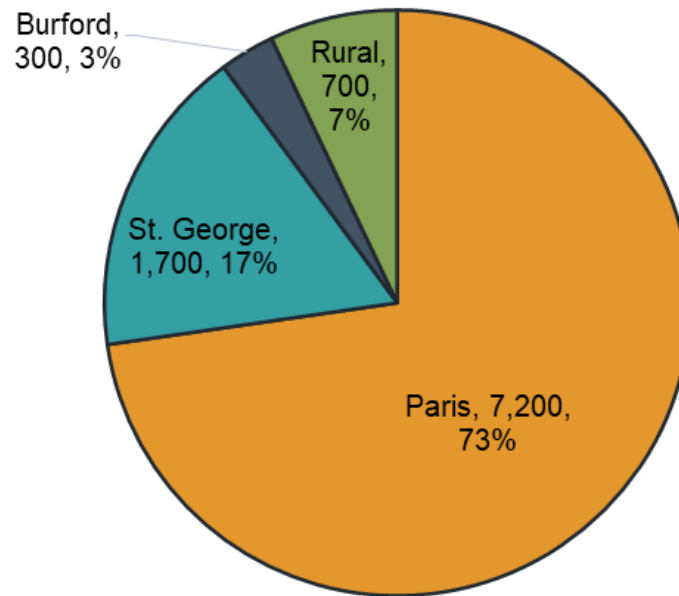
3.2 Employment Growth Allocations by Area to 2051

Figures 3-5 through 3-7 summarize the employment forecast to 2051 by area within the County. As previously discussed, Burford has been removed from the Rural System and categorized within the Urban System. Further details are provided in Appendix C. Key highlights include the following:

- Paris is anticipated to accommodate 73% of the County's employment growth over the 2021 to 2051 period, at an annual growth rate of 2.1%. This growth increment remains unchanged from the 2021 County of Brant M.C.R. Draft Report.
- St. George is anticipated to accommodate 17% of the County's employment growth over the 2021 to 2051 period, at an annual growth rate of 3.1%. This allocation also remains unchanged from the 2021 County of Brant M.C.R. Draft Report.
- Burford has been separated from the Rural System and has been reviewed as part of the Urban Employment Area land needs. Burford is anticipated to add 300 employees over the 2021 to 2051 period, at annual growth rate of 1.3%.
- The Rural System now excludes Burford from the employment analysis. As a result, the rural area employment growth increment forecast has decreased from 1,000 employees to 700 employees over the 2021 to 2051 period.



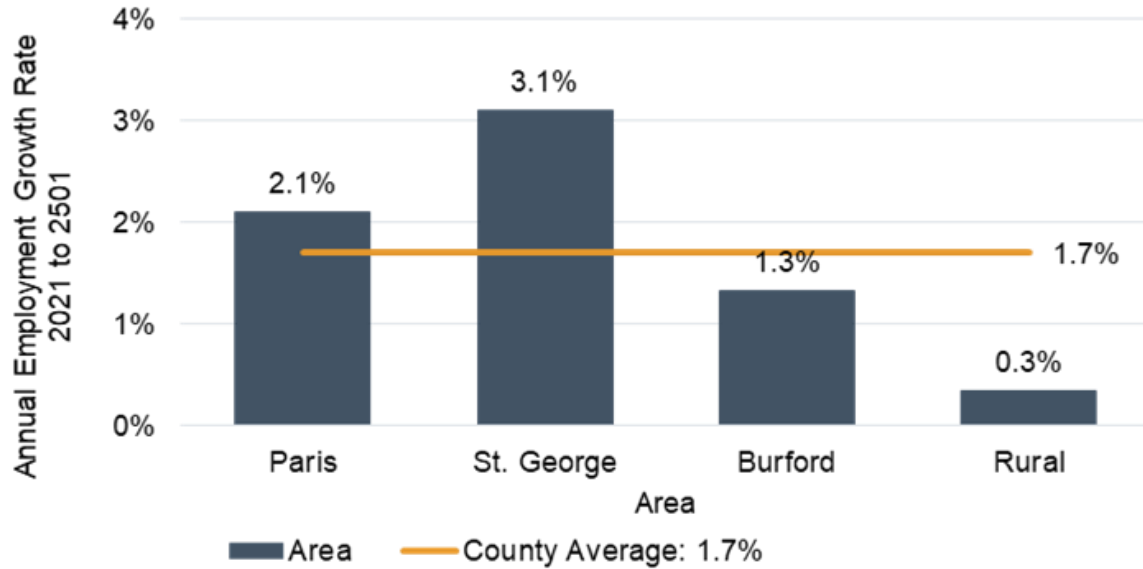
Figure 3-5
County of Brant
Employment Growth Allocation by Area,
2021 to 2051



Source: Watson & Associates Economists Ltd., 2023.

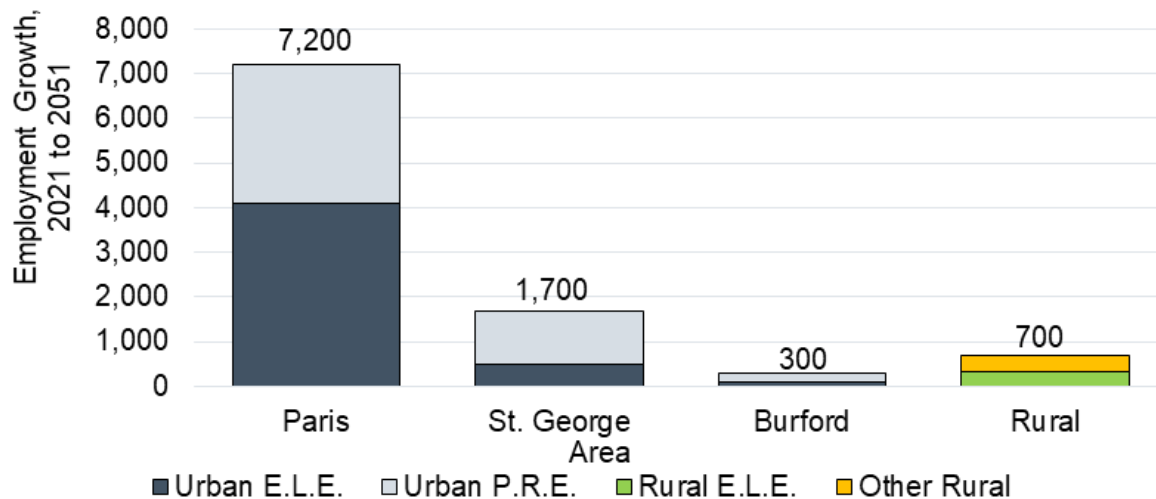


Figure 3-6
County of Brant
Forecast Annual Employment Growth Rates, 2021 to 2051



Source: Watson & Associates Economists Ltd., 2023.

Figure 3-7
County of Brant
Employment Category Growth by Area
2021 to 2051



Source: Watson & Associates Economists Ltd., 2023.



Figure 3-8 summarizes the employment growth forecast allocated to Urban Employment Areas over the 2021 to 2051 period. The County’s Urban Employment Areas are anticipated to accommodate approximately 5,900 employees over that period, approximately 60% of the County’s employment growth (5,900 / 9,900 = 60%). Over that period, the Urban Employment Areas are anticipated to comprise 80% of Urban E.L.E. uses which consist of industrial-type uses, while 20% of the employment is anticipated to comprise Urban P.R.E. Employment, primarily consisting of commercial/institutional sectors that support businesses and employees in the Employment Area.

Figure 3-8
County of Brant
Urban Employment Areas by Employment Type, 2021 to 2051

Employment Type in Employment Areas	Paris	St. George	Burford	Total Urban Employment Area	Share (%)
Urban P.R.E. Employment	975	60	85	1,120	20%
Urban E.L.E. Employment	4,150	540	25	4,715	80%
Total Urban Employment Area	5,200	600	110	5,910	100%
Share (%)	88%	10%	2%	100%	-

Source: Watson & Associates Economists Ltd., 2023.

3.3 Employment Area Land Supply and Adjustments

3.3.1 Employment Conversion Review

Changes to the designation of a site identified in the County’s O.P. as “Employment” to allow for uses not permitted for that designation, including residential, mixed-use and specific commercial uses, is considered an Employment Area land conversion. The 2021 County of Brant M.C.R. Draft Report included a review of four site area requests for conversions. Figure 3-9 summarizes the Employment Area conversion requests which total 107 ha. As part of that report, Employment Area conversion requests were reviewed and evaluated in accordance with subsections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019. The 2021 County of Brant M.C.R. Draft Report recommended that all requested sites remain designated Employment; however, based on the direction of County Council, one of the site areas, 67 Woodslee Avenue, has been identified for



conversion.^[1] The proposal for 67 Woodslee Avenue offered a unique opportunity to deliver affordable housing, a key priority for the County and Council. The map in Figure 3-10 illustrates the location of this site within the North Paris Employment Area. A detailed description of this site and other requested Employment Area land conversion sites can be found in Chapter 7 of the 2021 County of Brant M.C.R. Draft Report. Appendix I in this Addendum provides a summary of the Employment Conversion Analysis.

Figure 3-9
County of Brant
Conversion Request Sites Reviewed

Site	Site Location	Employment Area	Land Area, ha	Conversion Request
Site 1	67 Woodslee Ave.	Paris North Employment	4.2 ha	Mixed-Use Development
Site 2	326 Grand River St.	Paris North Employment	3.0 ha	Mixed-Use Commercial Development
Site 3a/ Site 3b	Sharp Rd.	Paris Southeast Employment Area	16.0 ha (approx.)	Urban Residential
Site 4a/ Site 4b	95 Old Onondaga Rd./ North of 366 County Rd. 18	Cainsville Employment Area	84.0 ha	Urban Residential
Total	-	-	107.2 ha	-

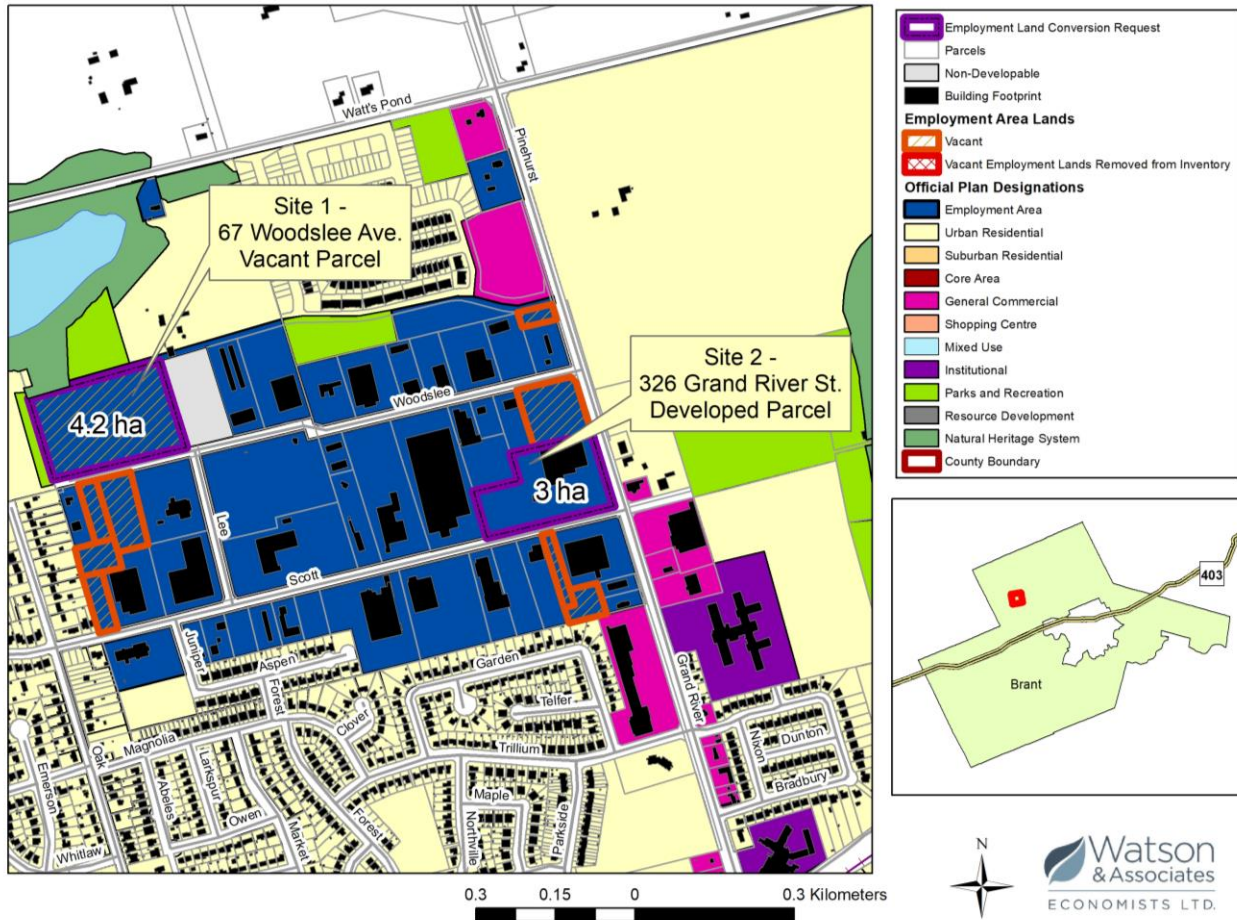
Source: County of Brant M.C.R. Report, July 2021, prepared by Watson & Associates Economists Ltd.

The Urban Employment Area vacant land supply has been adjusted by 4.2 ha to exclude 67 Woodslee Avenue.

[1] As presented at virtual Public Meetings held on July 31, 2021 and August 10, 2021.



Figure 3-10
County of Brant
Paris North Employment Area
Employment Area Land Conversion Requests



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

3.3.2 Land Supply and Urban Land Vacancy Allowance Adjustment

As discussed in the 2021 County of Brant M.C.R. Draft Report, an Urban Land Vacancy Allowance Adjustment was applied. This allowance is a necessary downward adjustment to land supply, in order to reflect the fact that 100% of any large area of employment lands is unlikely to be absorbed in the foreseeable future. There are various reasons for this to occur, including:

- parcels have become landlocked or difficult to access, with poor road visibility;



- parcels are held off the market for speculative reasons, such as selective marketing, expansion of an adjacent site, long-term land banking or proposed land use conversion;
- parcels are unusually expensive to service;
- sites are inefficient in size/shape; and
- sites have physical constraints (i.e., poor soil conditions, unattractive surroundings, or potential land use conflicts).

Based on a further review of the vacant land supply, a high vacancy rate has been applied to the mature Employment Areas in Paris. Figure 3-11 summarizes the land vacancy adjustment for Paris, St. George and Burford. A land vacancy adjustment of 15% was assumed for the Paris Highway 403 Business Park and Burford Employment Areas, while a land vacancy adjustment of 30% was applied to the rest of the Employment Areas in Paris and St. George. As a result, approximately 80 ha of vacant employment land supply has been deducted.

Figure 3-11
County of Brant
Urban System
Employment Area Supply and Adjustments to Supply

Vacant Employment Area Land	Paris	St. George	Burford	Total
Supply, gross ha (Vacant)	250	84	11	345
Land Vacancy Adjustment	21%	30%	15%	23%
Land Vacant Adjustment, deducted, gross ha	53	25	2	80
Adjusted Land Supply, gross ha	196	58	10	265

Source: Watson & Associates Economists Ltd., 2023.

3.4 Employment Area Land Needs Analysis to 2051

3.4.1 Employment Area Density and Anticipated Absorption Review

Over the forecast horizon, demand for Employment Area land is approximately 331 ha (11 ha annually) in Paris, 53 ha (2 ha annually) in St. George and 9 ha (less than 1 ha annually) in Burford. As discussed in the 2021 County of Brant M.C.R. Draft Report



(subsection 6.9.6), it is assumed that 10% of the Employment Area land demand in Paris will be accommodated on existing Employment Area sites through intensification.

As summarized in Figures 3-12a through 3-12c, the land demand requirements have been modified to include a market contingency factor. A market contingency factor of 35% has been applied to the Paris Highway 403 Business Park, while 10% has been applied to St. George and Burford. The market contingency factor ensures the County has the flexibility to accommodate potentially higher levels of forecast industrial land demand in its Employment Areas over the course of the planning horizon. This approach has been adopted to help ensure the County retains an adequate level of market choice of employment site options for prospective businesses and investors. Maintaining an adequate Employment Area land supply over the planning horizon has been a key concern of the County’s staff and Council, as a large portion of the remaining vacant Employment Area lands in the Paris Highway 403 Business Park are approved for development or have proposed development applications underway that are primarily controlled by a small group of land owners/investors.

The Employment Area density of Paris and St. George remains unchanged from the 2021 County of Brant M.C.R. Draft Report. Further details on density can be found in section 6.11 of the 2021 County of Brant M.C.R. Draft Report.

Figure 3-12a
County of Brant
Paris Urban Employment Area Land Demand to 2051

Paris Employment Areas	Employment	Density (jobs/ha)	Land Area, ha	Demand Adjusted for Intensification, ha	Annual Land Absorption, ha	Demand with Market Contingency, ha ^[1]
Employment Land Employment (E.L.E.)	4,150	12	346	311	10	420
Population-Related Employment (P.R.E.)	975	45	22	20	1	27
Total Employment Area	5,125	14	368	331	11	447

^[1] Market contingency of 35% has been applied to the Employment Area land demand. The market contingency provides for an additional 116 ha beyond the market forecast.
Source: Watson & Associates Economists Ltd., 2023.



Figure 3-12b
County of Brant
St. George Urban Employment Land Demand to 2051

St. George Employment Areas	Employment	Density (jobs/ha)	Land Area (ha)	Demand Adjusted for Intensification, ha	Annual Land Absorption, ha	Demand with Market Contingency, ha ^[1]
Employment Land Employment (E.L.E.)	540	11	51	51	2	56
Population-Related Employment (P.R.E.)	60	30	2	2	<1	2
Total Employment Area	600	11	53	53	2	58

^[1] Market contingency of 10% has been applied to the Employment Area land demand. The market contingency provides for an additional 5 ha beyond the market forecast.

Source: Watson & Associates Economists Ltd., 2023

Figure 3-12c
County of Brant
Burford Urban Employment Area Demand to 2051

Burford Employment Areas	Employment	Density (jobs/ha)	Land Area (ha)	Demand Adjusted for Intensification, ha	Annual Land Absorption, ha	Demand with Market Contingency, ha ^[1]
Employment Land Employment (E.L.E.)	85	10	9	9	<1	9
Population-Related Employment (P.R.E.)	25	45	1	1	<1	1
Total Employment Area	110	12	9	9	<1	10

^[1] Market contingency of 10% has been applied to the Employment Area land demand.

Source: Watson & Associates Economists Ltd., 2023

3.4.2 Urban Employment Land Needs

As summarized in Figure 3-13, comparing Urban Employment Area demand in Paris against the current vacant land supply generates an Employment Area shortfall of approximately 250 gross ha. In contrast, Burford and St. George have a sufficient supply of Employment Area lands.



Figure 3-13
County of Brant
Urban Employment Area Land Needs, 2021 to 2051

Urban Employment Area Land Needs	Paris	St. George	Burford	Total
Employment Area Land Supply (adjusted), ha	196	58	10	264
Employment Area Land Demand, includes Market Contingency, ha	447	58	10	515
Employment Land Needs, Surplus/(Shortfall), ha	(250)	0	0	(250)

Source: Watson & Associates Economists Ltd., 2023.

3.5 Employment Area Policy Considerations

3.5.1.1 Planning for Employment

The 2021 County of Brant M.C.R. Draft Report included a discussion of the following topics related to planning for employment in Employment Areas (section 6.10):

- Planning for Industrial Sectors;
- Planning for Goods Movement Sector;
- Planning for Knowledge-Base Sector;
- Planning for Employment Land Supportive Uses; and
- Major Retail Employment Areas.

The County of Brant Employment Area Strategy, currently underway (expected to be completed in Fall 2023), will explore the vision and planning for each Employment Area in the County, including Urban and Rural Employment Areas. A key concern of County Council and staff is the need to explore opportunities for each of its Employment Areas, recognizing the diversity of the County's Employment Areas.

3.5.1.2 Planning for Rural Employment Area Growth

It is difficult to forecast the land need requirements of Rural Employment Area land needs, given the rural nature of development (often sites do not include large permanent structures) and the specialized operation requirements. Rural Employment Areas are anticipated to accommodate Employment Area uses not easily



accommodated in Urban Employment Areas (such as laydown yards, manufacturing of construction products, uses that require open air production, etc.). Expansion of Rural Employment Areas should be evaluated on case-by-case basis and consider other policy requirements (e.g., M.D.S., agricultural assessment, etc.).

Further, the County of Brant is in a unique position with two of its Rural Employment Areas, the Cainsville Employment Area and the Airport Employment Area. Servicing expansions are anticipated for these two Employment Areas which will open opportunities for a wider range of uses, including uses typically accommodated in urban areas. Provided below is a summary of these two distinct Rural Employment Areas (Airport Employment Area and Cainsville Employment Area) with key considerations that will be explored in the upcoming County of Brant Employment Area Strategy.

Airport Employment Area

The Airport Employment Area in Brant is anchored by the Brantford Airport. The Airport Employment Area is categorized within the County's Rural System and provides water-only municipal services. It is estimated that the Airport Employment Area has approximately 50 ha of vacant employment lands. The City of Brantford, the owner and operator of the Brantford Airport, completed a Master Plan for the Airport in 2016. The Airport Employment Area has been identified as important to the function of the Brantford Airport Master Plan. The Master Plan relies on the availability of Employment Area lands surrounding the Airport to support future expansion and business opportunities. The Brantford Airport Master Plan has identified "properties of interest" for future expansion to support the Airport, including lands to the north of the Airport (18 ha) and lands to the west of the Airport (approximately 32 ha), as illustrated in Figure 3-14. The "property of interest" to the west is currently not designated for Employment use in the County of Brant O.P.^[1]

It is important to recognize that the Employment Area surrounding the Airport already offers a level of protection for the Employment Area from sensitive uses, such as residential uses. A large portion of lands surrounding the Airport Employment Area are under a Brantford Airport Protection Overlay, as illustrated in Figure 3-15. The

[1] City of Brantford Brantford Airport Master Plan prepared by Aviotec International Inc., July 2016.



Brantford Airport Protection Overlay provides restrictions on the uses, including the type of agricultural uses that can be cultivated in the area.

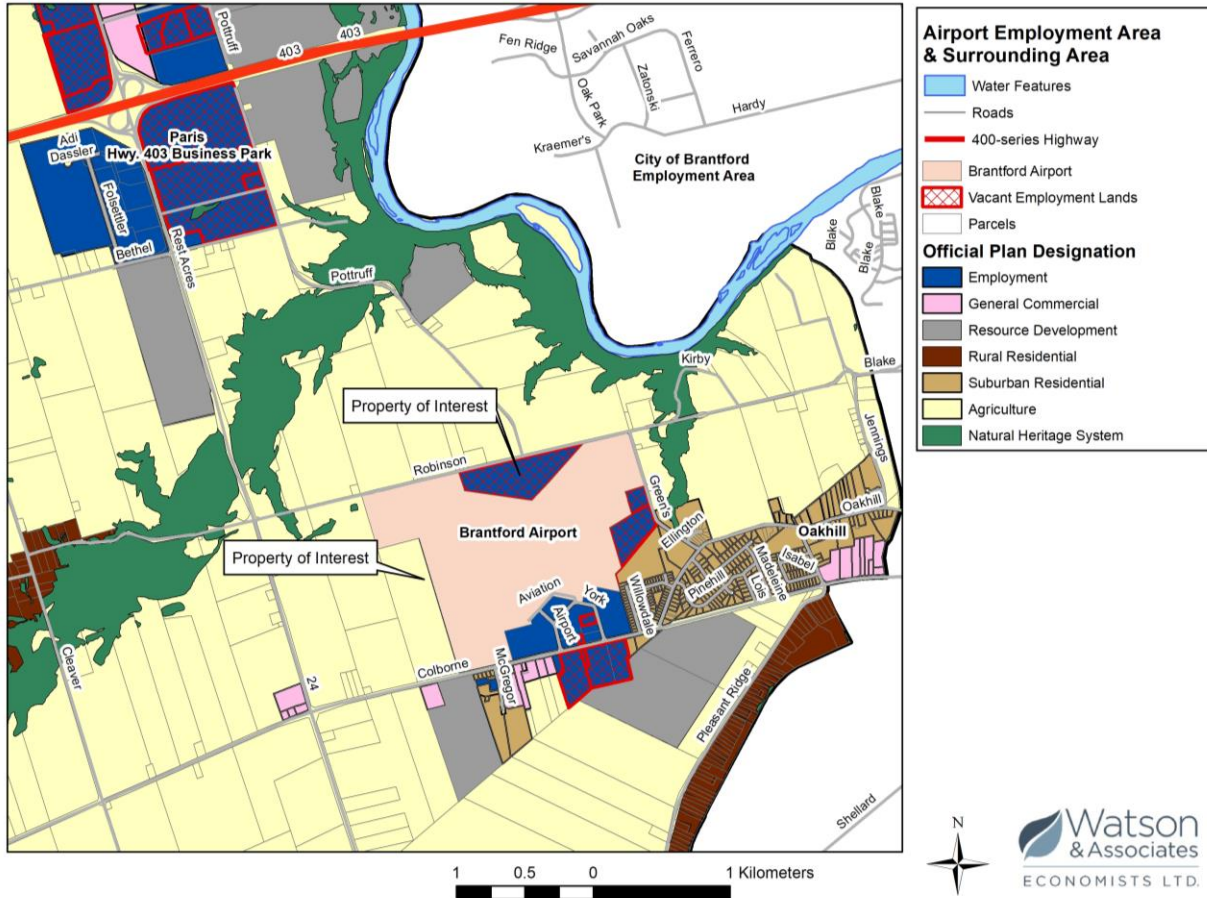
The servicing agreement with the City of Brantford for expanding municipal servicing in the area offers an opportunity for future expansion of the Airport Employment Area. A part of the condition for the annexation of lands from the County of Brant to the City of Brantford includes the requirement that the County and City enter into a servicing agreement where the City will commit to allow the County to connect to the City's servicing infrastructure in the Airport Employment Area. This agreement would allow the potential for the County to expand the Airport Employment Area westward to Rest Acres Road, comprising approximately 158 ha of lands currently designated as agricultural uses.^[1]

The Airport Employment Area should be recognized as a strategic focus area for future Employment Area expansion. The County of Brant Employment Area Strategy will explore opportunities for the Airport Employment Area, including the vision and types of sectors that would be attracted to the Airport Employment Area.

[1] The County of Brant and City of Brantford Joint Service Area Servicing Brief prepared by GM BluePlan, May 2018.



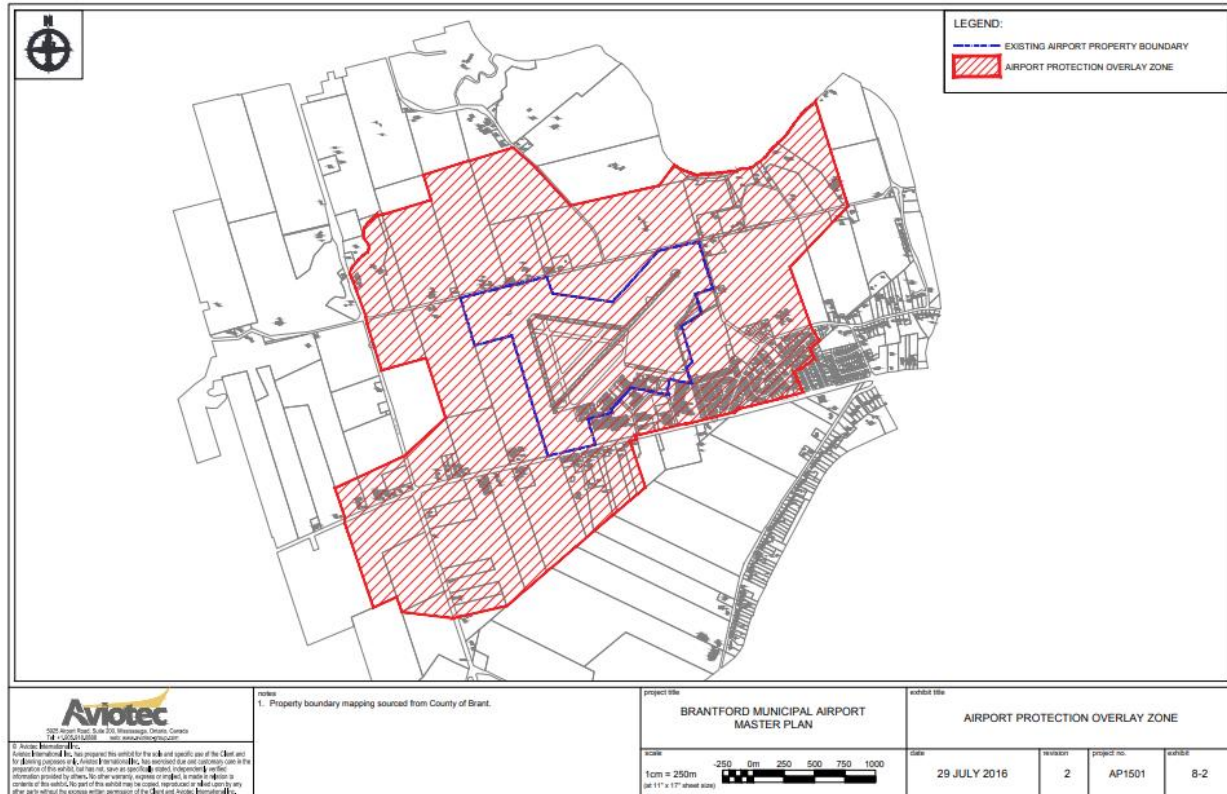
Figure 3-14
County of Brant
Airport Employment Area and the Surrounding Area



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Figure 3-15
County of Brant
Brantford Airport Protection Area



Source: City of Brantford, Brantford Airport Master Plan, 2016 – 2035, prepared by Aviotech International Inc., July 2016.

Cainsville Employment Area

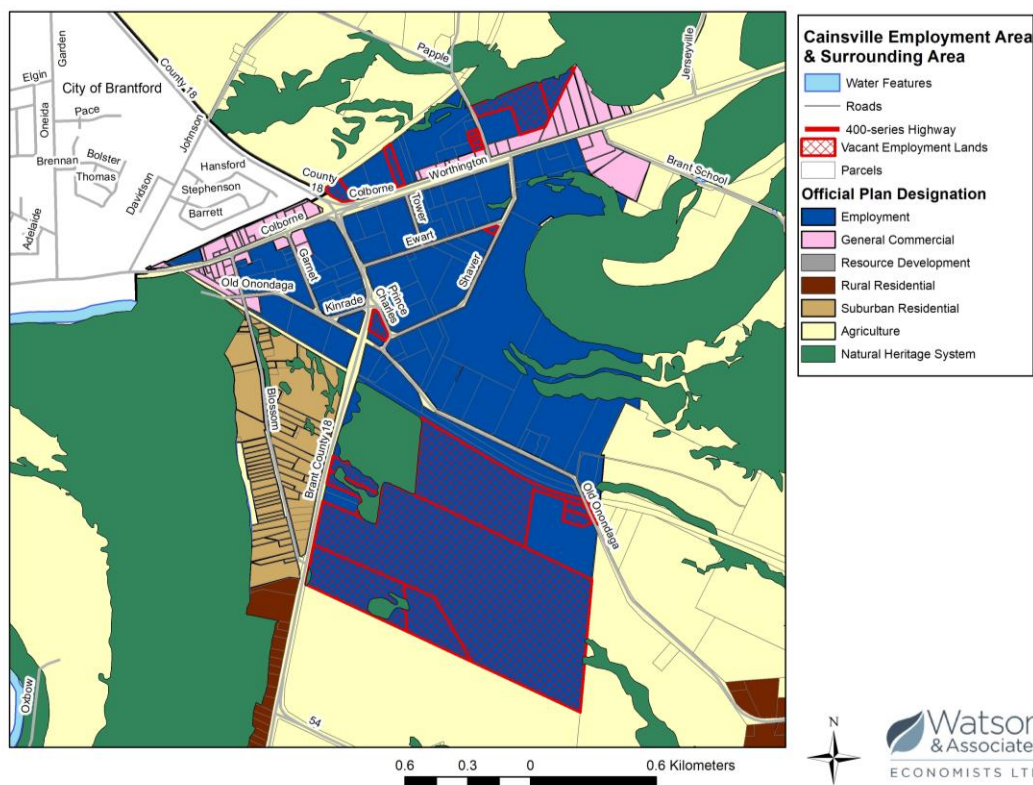
The Cainsville Employment Area is situated east of the City of Brantford. The Cainsville Employment Area is considered within the Rural System since it does not have a built-up boundary delineated by the Province and lacks full municipal servicing. The Cainsville Employment Area is a water-only Employment Area that has already exceeded its servicing capacity. Similar to the Airport Employment Area, the Cainsville Employment Area is also a part of the joint servicing agreement with the City of Brantford. As part of the servicing agreement, there is the potential to service future



Employment Area development, in particular the large tracts of land along the southern portion of Cainsville.^[1]

The Cainsville Employment Area should be recognized as a strategic focus area for future Employment Area expansion. The County of Brant Employment Area Strategy will explore the opportunity for the Cainsville Employment Area, including the vision and types of sectors that would be attracted to the Cainsville Employment Area once servicing is extended to this area.

Figure 3-16
County of Brant
Cainsville Employment Area



Note: The Official Plan designations displayed are based on current County of Brant Official Plan (2012).

^[1] The County of Brant and City of Brantford Joint Service Area Servicing Brief prepared by GM BluePlan, May 2018.



3.5.1.3 Employment Area Growth Monitoring

Figure 3-17 provides a summary of the estimated Employment Area land supply in Paris, St. George and Burford since the land supply was compiled for the 2021 County of Brant M.C.R. Draft Report. Key highlights include:

- The Employment Area land supply utilized in the 2021 County of Brant M.C.R. Draft Report was based on data as of early 2020. Since 2020, the land supply in Paris has been reduced by 29 ha. The reduction of the land supply is largely attributed towards absorption of approximately 20 ha, and 9 ha based on adjustment to parcels.
- Paris has approximately 139 ha of vacant Employment Area land as of January 2023, followed by St. George at 58 ha and Burford at 10 ha.
- It is important to note that absorption is based on parcels where a building permit has been issued. It is recognized that there are plans underway to develop parcels in the Employment Areas where no building permits have been issued yet. Furthermore, any lands absorbed and the associated employment occurring since the 2021 County of Brant M.C.R. would be included as part of the growth increment over the 2021 to 2051 period.
- It is estimated that the Employment Areas in Paris have approximately 13 years of supply remaining. Figure 3-17 excludes the market contingency as previously discussed.

Figure 3-17
Primary Settlement Areas
Employment Areas Land Supply as of January 2023

Primary Settlement Area	Changes to Land Supply Since Brant M.C.R. Draft Report, ha	Updated Employment Land Supply as of January 2023, ha	Adjusted for Land Vacancy Adjustment, ha	Annual Demand, ha	Years of Supply Remaining
Paris	29	231	139	11.0	13
St. George	0	89	58	2.0	29
Burford	0	10	10	0.3	32
Total	29	330	207	13.3	-



Source: Watson & Associates Economists Ltd., 2023, based on updated Employment Area land supply provided by the County of Brant.

It is recommended that the County of Brant actively monitor its Employment Area land supply on an annual basis and provide further details on the type of development the County is accommodating on Employment Area lands.



Chapter 4

Settlement Area Expansion Review



4. Settlement Boundary Area Expansion Review – Employment Areas

4.1 Settlement Boundary Area Expansion Review for Urban Employment Areas

As part of the 2021 County of Brant M.C.R. Draft Report, several S.A.B.E requests for lands adjacent to the Paris Highway 403 Business Park were received and reviewed. In accordance with S.A.B.E. evaluation criteria established through the 2021 County of Brant M.C.R. (refer to Chapter 8, section 8.2 of the County's 2021 M.C.R. Draft Report), specific sites adjacent to the Paris Highway 403 Business Park were recommended for Employment Area expansion to accommodate anticipated Employment Area land demand to the year 2051. The Paris Highway 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

The S.A.B.E. requests in the Paris Highway 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes:

- Municipal Servicing (water/wastewater and transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction Impacts;
- Land Use Planning; and
- Market Analysis.

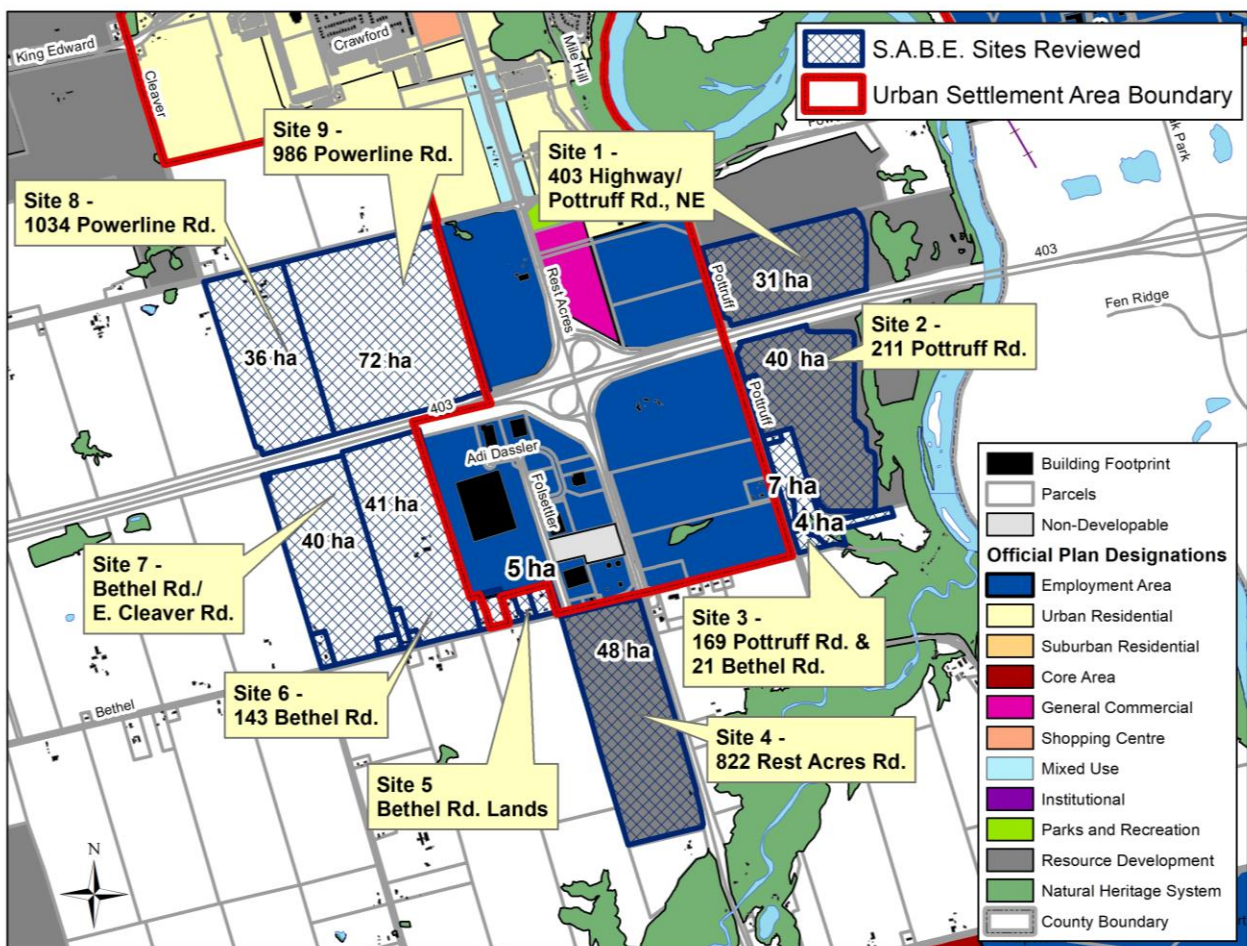
Chapter 8 of the 2021 County of Brant M.C.R. Draft Report and Appendix L in this Addendum provides a summary of the S.A.B.E. evaluation criteria and is based on the above six themes which have been organized to address the policy requirements of the Growth Plan, 2019 and the P.P.S., 2020, as well as local criteria.

Figure 4-1 provides a map of the nine S.A.B.E. Urban Employment Area requests in the Paris Highway 403 Business Park including size of site (net of environmental features). Overall, the nine packaged requests total approximately 324 gross ha (net of natural heritage features and constrained lands). As previously discussed, the County requires 250 gross ha of Employment Area land in Paris to accommodate employment growth to 2051. Based on the Employment Area land requirements and the evaluations of the



S.A.B.E, it is recommended that the County expand the Paris Highway 403 Business Park to include most of the sites identified in Figure 4-1. The only S.A.B.E. to be excluded is Site 4 (measuring approximately 48 ha). Site 4 provides more land than is required over the planning horizon and is surrounded by agricultural uses. Furthermore, Site 4 would not support a distinct edge to the Employment Area for planning purposes.

Figure 4-1
County of Brant
S.A.B.E. Urban Employment Area Sites Reviewed



Notes: Figure includes current County of Brant Official Plan (2012) designations. Land area estimates by site area are net of estimated Natural Heritage System lands.



Chapter 5

Conclusions



5. Conclusions

Based on the comprehensive analysis carried out in the 2021 County of Brant M.C.R. Draft Report and this Addendum, it has been determined that the County has a surplus of Community Area land of approximately 742 gross ha to 2051. The surplus has increased due to the inclusion of Burford in the L.N.A. These surplus lands are not considered to be needed to accommodate the minimum population and housing forecasts and will be subject on ongoing analysis upon subsequent O.P. reviews. It is recommended that the County maintain these surplus Community Area lands as their current designation. The additional opportunity to accommodate population and housing should be evaluated at the next M.C.R. process. Furthermore, it is recommended that the County continue to monitor its population and housing growth, ensuring that growth is phased appropriately with infrastructure requirements.

The County has a shortfall of designated Urban Employment Area lands of approximately 250 gross ha. The shortfall is in Paris, while St. George and Burford have sufficient supply. The County should explore options to add additional Urban Employment Areas, including expanding the settlement area boundary in Paris to accommodate additional Employment Area lands in the Paris Highway 403 Business Park. The County received several requests for S.A.B.E.s in this area. The Paris Highway 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

The S.A.B.E. requests in the Paris Highway 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes which will be submitted to the Province for review and approval:

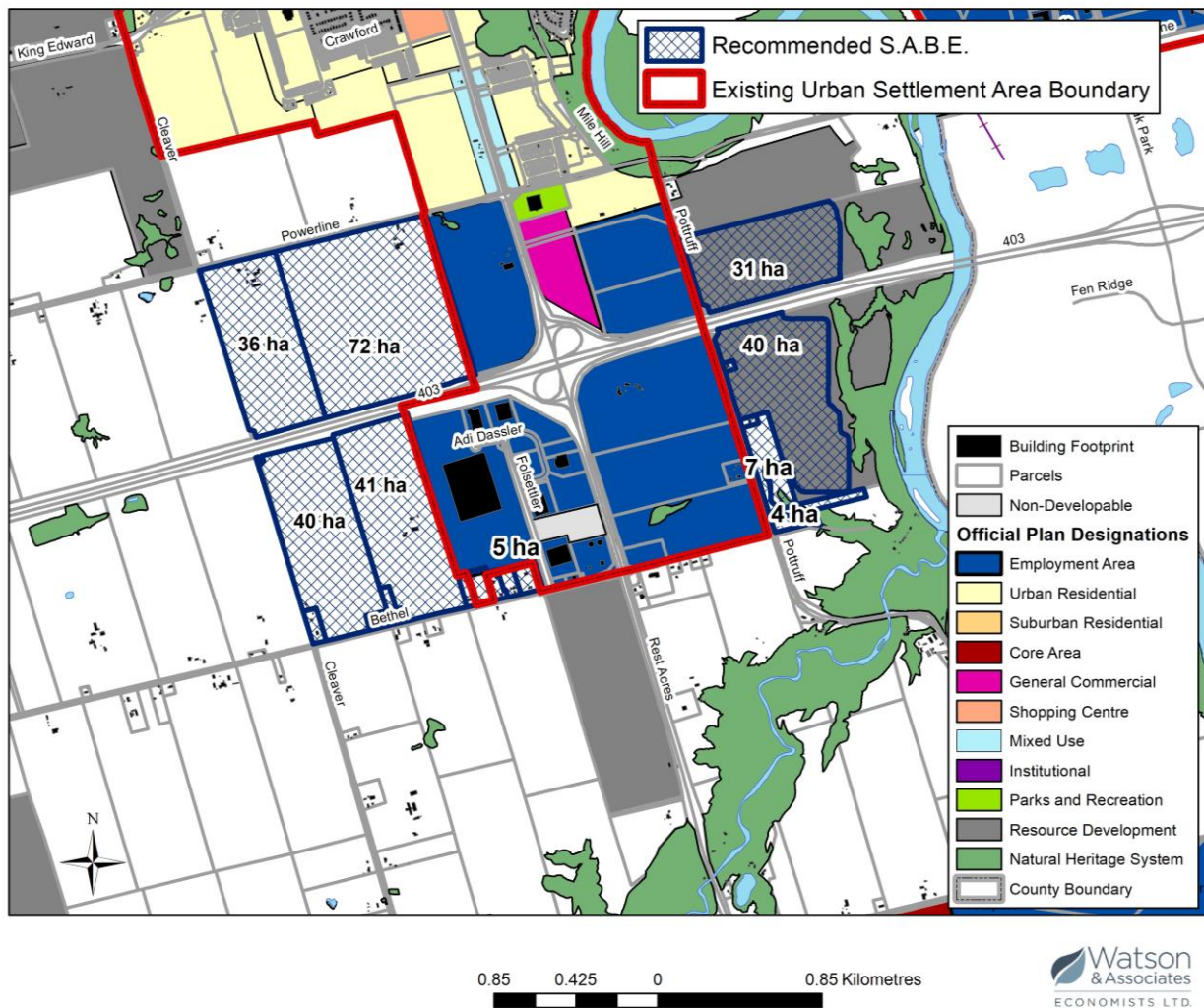
- Municipal Servicing (Water/Wastewater and Transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction Impacts;
- Land-Use Planning; and
- Market Analysis.

As part of the S.A.B.E. analysis, the assessment determined that approximately 276 ha of Employment Area land needs should be added to the urban area, including 250 ha



for the identified need and 26 ha to round out the area for planning purposes. It should be noted that the land area net of the Natural Heritage System is an estimate and would be further refined as development applications are submitted. The preferred Employment Area Expansion Area in Paris is identified in Figure 5-1.

Figure 5-1
County of Brant
Recommended S.A.B.E. – Employment Area



Notes: Figure includes current County of Brant Official Plan (2012) designations. Land area estimates by site area are net of estimated Natural Heritage System lands.



Appendix A

County of Brant Headship Rates

Note: The following appendix is derived from the County of Brant M.C.R. Draft Report, July 2021, and no changes have been made.



Appendix A: County Brant, Housing Headship Rates, 2016 to 2051

Figure A-1: County Brant, Housing Headship Rates, 2016 to 2051

Age Cohort	Household Headship Rates									
	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-14	-	-	-	-	-	-	-	-	-	-
15-24	3.6%	4.7%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%
25-34	34.2%	31.4%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%
35-44	47.8%	47.8%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%
45-54	50.2%	48.9%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%
55-64	52.4%	56.9%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%
65-74	57.8%	55.8%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%
75+	62.6%	60.9%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%
Total	34.2%	35.3%	35.2%	35.8%	36.2%	36.4%	36.6%	36.9%	37.1%	37.3%

Source: 2006 to 2016 derived from Statistics Canada Census data, and 2016 to 2051 by Watson & Associates Economists Ltd.



Appendix B

County of Brant Population and Housing Forecast

Note: The following appendix includes figures that have been updated as part of this Addendum. The 2021 population has been updated from 40,500 in the 2021 M.C.R. to 40,700 in this update based on the 2021 Statistics Canada Census (adjusted for the undercount), a difference of 200 people. No significant changes have been identified in the population age structure in 2021. Therefore, there are no concerns with respect to the 2021 M.C.R. population and housing forecasts.



Appendix B: Population and Housing Forecasts

Figure B-1
County of Brant
Population and Housing Forecast to 2051

Period	Population	Low-density Units	Medium-density Units	High-density Units	Other Units	Total Households	P.P.U.
2021	40,700	12,585	965	725	50	14,325	2.84
2026	44,100	13,680	1,370	860	50	15,960	2.76
2031	47,000	14,445	1,545	1,080	50	17,120	2.75
2036	50,100	15,225	1,675	1,385	50	18,335	2.73
2041	53,000	15,980	1,805	1,715	50	19,550	2.71
2046	56,000	16,760	1,885	2,085	50	20,780	2.69
2051	59,000	17,420	1,970	2,550	50	21,990	2.68
2021 - 2026	3,400	1,095	405	135	0	1,635	-
2021 - 2031	6,300	1,860	580	355	0	2,795	-
2021 - 2036	9,400	2,640	710	660	0	4,010	-
2021 - 2041	12,400	3,395	840	990	0	5,225	-
2021 - 2046	15,300	4,175	920	1,360	0	6,455	-
2021 - 2051	18,300	4,835	1,005	1,825	0	7,665	-
2021-2051	18,300	4,905	985	1,775	0	7,665	-
Annual Growth	610	164	33	59	0	256	-
Housing Mix (%)	-	64%	13%	23%	0%	100%	-

Source: Watson & Associates Economists Ltd., 2023.



Figure B-2: County of Brant, Total Population Forecast by Major Age Group, 2016 to 2051

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	9,200	9,300	8,900	8,800	9,100	9,700	10,300	10,700	11,300	11,700	12,200
20-34	5,400	6,000	6,000	6,200	6,400	6,700	6,900	7,300	7,600	8,000	8,200
35-44	5,500	5,400	4,700	4,500	4,800	5,100	5,300	5,600	5,700	6,000	6,600
45-54	5,000	5,700	6,100	5,700	5,400	5,600	6,100	6,400	6,600	7,100	7,300
55-64	3,300	4,400	5,300	5,700	6,300	6,300	6,000	6,300	6,800	7,100	7,400
65-74	2,400	2,700	3,100	4,000	5,000	5,600	6,200	6,300	6,100	6,400	6,900
75+	2,100	2,300	2,500	2,900	3,600	4,800	6,200	7,500	8,900	9,800	10,400
Total	32,900	35,800	36,700	37,800	40,500	43,800	47,000	50,100	53,000	56,000	59,000

Source: 2001 to 2016 Derived from from Statistics Canada, Demography Division. 2016 to 2051 forecast by Watson & Associates Economists Ltd.

¹ Population includes Census undercount. Forecast population includes net Census undercount of approximately 3.0%.

Note: Figures may not add precisely due to rounding.

Figure B-3: County of Brant, Total Population Forecast Shares by Major Age Group, 2016 to 2051

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	28%	26%	24%	23%	22%	22%	22%	21%	21%	20.8%	20.7%
20-34	16%	17%	16%	16%	16%	15%	15%	15%	14%	14.3%	13.8%
35-44	17%	15%	13%	12%	12%	12%	11%	11%	11%	10.8%	11.1%
45-54	15%	16%	17%	15%	13%	13%	13%	13%	12%	12.6%	12.4%
55-64	10%	12%	15%	15%	16%	14%	13%	13%	13%	12.7%	12.6%
65-74	7%	7%	8%	11%	12%	13%	13%	13%	11%	11.4%	11.7%
75+	6%	7%	7%	8%	9%	11%	13%	15%	17%	17.4%	17.7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100.0%	100.0%

Source: 2001 to 2016 Derived from from Statistics Canada, Demography Division. 2016 to 2051 forecast by Watson & Associates Economists Ltd.

¹ Population includes Census undercount. Forecast population includes net Census undercount of approximately 3.0%.

Note: Figures may not add precisely due to rounding.



Appendix C

County of Brant Population, Housing and Employment Forecasts by Settlement Area and Remaining Rural Area

Note: The following appendix includes figures that have been updated as part of this Addendum.



Appendix C: County of Brant Total Population and Housing Forecasts by Settlement Area and Rural System

Figure C-1
County of Brant
Population and Housing Forecast to 2051

Area	Forecast Period	Total Population with Undercount ^[1]	Total Residential Units	Persons Per Unit (P.P.U.)	Total Employment (Including N.F.P.O.W.) ^[2]	Employment Activity Rate
Paris	2021	15,400	5,655	2.72	8,300	53.9%
	2031	20,500	7,720	2.66	10,700	52.2%
	2041	23,300	8,915	2.61	13,100	56.2%
	2051	25,400	9,870	2.57	15,500	61.0%
	2021-2051	10,000	4,215		7,200	
St. George	2021	3,500	1,240	2.82	1,200	34.3%
	2031	3,700	1,370	2.70	1,500	40.5%
	2041	5,500	2,040	2.70	2,200	40.0%
	2051	7,500	2,850	2.63	3,000	40.0%
	2021-2051	4,000	1,610		1,800	
Burford	2021	1,800	690	2.61	600	33.3%
	2031	1,900	736	2.58	700	36.8%
	2041	2,100	819	2.56	800	38.1%
	2051	2,400	945	2.54	900	37.5%
	2021-2051	600	255		300	
Rural System	2021	20,000	6,740	2.97	6,000	30.0%
	2031	20,900	7,294	2.87	6,100	29.2%
	2041	22,100	7,776	2.84	6,200	28.1%
	2051	23,700	8,325	2.85	6,600	27.8%
	2021-2051	3,700	1,585		600	
County of Brant	2021	40,700	14,325	2.84	16,100	39.6%
	2031	47,000	17,120	2.75	19,000	40.4%
	2041	53,000	19,550	2.71	22,300	42.1%
	2051	59,000	21,990	2.68	26,000	44.1%
	2021-2051	18,300	7,665		9,900	

[1] Population undercount estimated at 3.0%.

[2] Statistics Canada defines employees with no fixed place of work as “persons who do not go from home to the same workplace location at the beginning of each shift. Such persons including building and landscape contractors, travelling salespersons, independent truck drivers, etc.”

Source: Watson & Associates Economists Ltd., 2023.



Figure C-2
Paris Primary Settlement Area
Population and Housing Forecast to 2051

Period	Population	Low-density Units	Medium-density Units	High-density Units	Other Units	Total Households	P.P.U.
2021	15,400	4,335	715	605	0	5,655	2.72
2026	18,300	5,050	1,110	730	0	6,890	2.66
2031	20,500	5,495	1,275	950	0	7,720	2.66
2036	22,100	5,815	1,405	1,170	0	8,390	2.63
2041	23,300	6,035	1,475	1,405	0	8,915	2.61
2046	24,400	6,215	1,535	1,665	0	9,415	2.59
2051	25,400	6,355	1,585	1,930	0	9,870	2.57
2021 - 2026	2,900	715	395	125	0	1,235	-
2021 - 2031	5,100	1,160	560	345	0	2,065	-
2021 - 2036	6,700	1,480	690	565	0	2,735	-
2021 - 2041	7,900	1,700	760	800	0	3,260	-
2021 - 2046	9,000	1,880	820	1,060	0	3,760	-
2021 - 2051	10,000	2,020	870	1,325	0	4,215	-
2021-2051	10,000	2,020	870	1,325	0	4,215	-
Annual Growth	333	67	29	44	0	141	-
Housing Mix (%)	-	48%	21%	31%	0%	100%	-

Source: Watson & Associates Economists Ltd., 2023.



Figure C-3
St. George Primary Settlement Area
Population and Housing Forecast to 2051

Period	Population	Low-density Units	Medium-density Units	High-density Units	Other Units	Total Households	P.P.U.
2021	3,500	1,140	75	25	0	1,240	2.82
2026	3,500	1,185	80	25	0	1,290	2.71
2031	3,700	1,250	95	25	0	1,370	2.70
2036	4,600	1,470	95	110	0	1,675	2.75
2041	5,500	1,680	155	205	0	2,040	2.70
2046	6,600	1,960	175	315	0	2,450	2.69
2051	7,500	2,125	210	515	0	2,850	2.63
2021 - 2026	0	45	5	0	0	50	-
2021 - 2031	200	110	20	0	0	130	-
2021 - 2036	1,100	330	20	85	0	435	-
2021 - 2041	2,000	540	80	180	0	800	-
2021 - 2046	3,100	820	100	290	0	1,210	-
2021 - 2051	4,000	985	135	490	0	1,610	-
2021-2051	4,000	985	135	490	0	1,610	-
Annual Growth	133	33	5	16	0	54	-
Housing Mix (%)	-	61%	8%	30%	0%	100%	-

Source: Watson & Associates Economists Ltd., 2023.



Figure C-4
Burford Primary Settlement Area
Population and Housing Forecast to 2051

Period	Population	Low-density Units	Medium-density Units	High-density Units	Other Units	Total Households	P.P.U.
2021	1,800	565	65	60	0	690	2.61
2026	1,900	588	65	60	0	713	2.66
2031	1,900	611	65	60	0	736	2.58
2036	2,000	635	65	60	0	760	2.63
2041	2,100	694	65	60	0	819	2.56
2046	2,200	753	65	60	0	878	2.55
2051	2,400	820	65	60	0	945	2.54
2021 - 2026	100	23	0	0	0	23	-
2021 - 2031	100	46	0	0	0	46	-
2021 - 2036	200	70	0	0	0	70	-
2021 - 2041	300	129	0	0	0	129	-
2021 - 2046	400	188	0	0	0	188	-
2021 - 2051	600	255	0	0	0	255	-
Annual Growth	20	9	0	0	0	9	-
Housing Mix (%)	-	100%	0%	0%	0%	100%	-

Source: Watson & Associates Economists Ltd., 2023.



Figure C-5
Rural Area
Population and Housing Forecast to 2051

Period	Population	Low-density Units	Medium-density Units	High-density Units	Other Units	Total Households	P.P.U.
2021	20,000	6,545	110	35	50	6,740	2.97
2026	20,300	6,857	110	45	50	7,062	2.87
2031	20,800	7,084	110	45	50	7,289	2.85
2036	21,400	7,305	110	45	50	7,510	2.85
2041	22,100	7,571	110	45	50	7,776	2.84
2046	22,800	7,832	110	45	50	8,037	2.84
2051	23,700	8,120	110	45	50	8,325	2.85
2021 - 2026	300	312	0	10	0	322	-
2021 - 2031	800	539	0	10	0	549	-
2021 - 2036	1,400	760	0	10	0	770	-
2021 - 2041	2,100	1,026	0	10	0	1,036	-
2021 - 2046	2,800	1,287	0	10	0	1,297	-
2021 - 2051	3,700	1,575	0	10	0	1,585	-
Annual Growth	123	53	0	0	0	53	-
Housing Mix (%)	-	99%	0%	1%	0%	100%	-

Source: Watson & Associates Economists Ltd., 2023.

Figure C-6
All Settlement Areas in Brant County (Urban System and Rural System)
Population and Housing Forecast to 2051

Settlement Areas	Population		Housing Units		Growth		Share of Housing Growth
	2021	2051	2021	2051	Population, 2021 to 2051	Housing Units, 2021 to 2051	
Paris	15,400	25,400	5,660	9,870	10,000	4,210	55%
St. George	3,500	7,500	1,240	2,850	4,000	1,610	21%
Burford	1,800	2,400	690	945	600	255	3%
Rural Settlement Areas	5,200	8,200	1,750	2,860	3,000	1,110	15%
<i>Rural Settlement Areas</i>							
<i>Scotland</i>	900	1,555	303	543	655	240	3.1%
<i>Mount Pleasant</i>	950	1,600	321	561	650	240	3.1%
<i>Oakland</i>	460	1,075	156	376	615	220	2.9%
<i>Oakhill</i>	800	1,060	268	368	260	100	1.3%
<i>Onondaga</i>	210	350	72	122	140	50	0.7%
<i>Glen Morris</i>	540	650	181	226	110	45	0.6%
<i>Cainsville</i>	180	280	62	97	100	35	0.5%
<i>Brant County Road #22 & HWY #54</i>	40	120	13	41	80	28	0.4%
<i>Harley</i>	110	200	38	68	90	30	0.4%
<i>Cathcart</i>	180	260	59	89	80	30	0.4%



<i>Burtch</i>	60	130	21	46	70	25	0.3%
<i>New Durham</i>	50	120	16	41	70	25	0.3%
<i>Falkland</i>	180	210	59	74	30	15	0.2%
<i>Muir</i>	20	50	7	17	30	10	0.1%
<i>Princeton</i>	40	50	14	19	10	5	0.1%
<i>Gobles</i>	40	50	13	17	10	4	0.1%
<i>Fairfield Plain</i>	30	40	10	13	10	3	0.0%
<i>Harrisburg</i>	230	230	78	80	0	2	0.0%
<i>Kelvin</i>	70	70	22	22	0	0	0.0%
<i>Middleport</i>	110	110	36	36	0	0	0.0%
Remaining Rural Area	14,800	15,500	5,000	5,465	700	465	6%
Total Brant County	40,700	59,000	14,340	21,990	18,300	7,650	100%

Note: Population undercount estimated at 3.0%.

Source: Watson & Associates Economists Ltd., 2023.

Appendix C-3: County of Brant Employment Forecasts by Primary Settlement Areas and Rural System

Figure C-7
County of Brant Employment Forecast, 2021 to 2051

Year	Primary Settlement Areas			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2021	4,519	5,653	10,172	3,349	2,557	5,907	16,078	63%	37%
2026	5,243	6,356	11,599	3,405	2,582	5,987	17,586	66%	34%
2031	5,937	6,993	12,930	3,476	2,594	6,070	19,000	68%	32%
2036	6,707	7,686	14,394	3,508	2,679	6,186	20,580	70%	30%
2041	7,584	8,426	16,010	3,545	2,775	6,320	22,330	72%	28%
2046	8,374	9,285	17,659	3,569	2,891	6,461	24,120	73%	27%
2051	9,230	10,161	19,390	3,585	3,025	6,610	26,000	75%	25%
Incremental Growth									
2021 - 2026	724	703	1,427	56	24	81	1,508	95%	5%
2021 - 2031	1,418	1,341	2,758	127	36	164	2,922	94%	6%
2021 - 2036	2,188	2,034	4,222	159	121	280	4,502	94%	6%
2021 - 2041	3,065	2,773	5,838	196	217	414	6,252	93%	7%
2021 - 2046	3,855	3,633	7,488	220	334	554	8,042	93%	7%
2021 - 2051	4,711	4,508	9,219	236	468	703	9,922	93%	7%



Source: Watson & Associates Economists Ltd., 2023.

Figure C-8
Paris Employment Forecast, 2021 to 2051

Year	Primary Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2021	3,816	4,523	8,340	0	0	0	8,340	100%	0%
2026	4,500	5,121	9,622	0	0	0	9,622	100%	0%
2031	5,132	5,586	10,718	0	0	0	10,718	100%	0%
2036	5,794	6,063	11,857	0	0	0	11,850	100%	0%
2041	6,527	6,524	13,051	0	0	0	13,051	100%	0%
2046	7,200	7,083	14,283	0	0	0	14,283	100%	0%
2051	7,911	7,626	15,538	0	0	0	15,538	100%	0%
Incremental Growth									
2021 - 2026	684	598	1,282	0	0	0	1,282	100%	0%
2021 - 2031	1,315	1,063	2,378	0	0	0	2,378	100%	0%
2021 - 2036	1,978	1,540	3,518	0	0	0	3,518	100%	0%
2021 - 2041	2,710	2,001	4,711	0	0	0	4,711	100%	0%
2021 - 2046	3,383	2,560	5,944	0	0	0	5,944	100%	0%
2021 - 2051	4,095	3,103	7,198	0	0	0	7,198	100%	0%

Source: Watson & Associates Economists Ltd.

Figure C-9
St. George Employment Forecast, 2021 to 2051

Year	Primary Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2021	502	730	1,232	0	0	0	1,232	100%	0%
2026	533	794	1,327	0	0	0	1,327	100%	0%
2031	585	927	1,512	0	0	0	1,512	100%	0%
2036	673	1,113	1,786	0	0	0	1,786	100%	0%
2041	797	1,362	2,159	0	0	0	2,159	100%	0%
2046	904	1,622	2,526	0	0	0	2,526	100%	0%
2051	1,028	1,924	2,953	0	0	0	2,953	100%	0%
Incremental Growth									
2021 - 2026	31	65	96	0	0	0	96	100%	0%
2021 - 2031	83	198	280	0	0	0	280	100%	0%
2021 - 2036	171	384	554	0	0	0	554	100%	0%
2021 - 2041	295	632	927	0	0	0	927	100%	0%
2021 - 2046	402	893	1,294	0	0	0	1,294	100%	0%
2021 - 2051	526	1,195	1,721	0	0	0	1,721	100%	0%

Source: Watson & Associates Economists Ltd.



Figure C-10
Burford Employment Forecast, 2021 to 2051

Year	Primary Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2021	200	400	600	0	0	0	600	100%	0%
2026	210	440	650	0	0	0	650	100%	0%
2031	220	480	700	0	0	0	700	100%	0%
2036	240	510	750	0	0	0	750	100%	0%
2041	260	540	800	0	0	0	800	100%	0%
2046	270	580	850	0	0	0	850	100%	0%
2051	290	610	900	0	0	0	900	100%	0%
Incremental Growth									
2021 - 2026	10	40	50	0	0	0	50	100%	0%
2021 - 2031	20	80	100	0	0	0	100	100%	0%
2021 - 2036	40	110	150	0	0	0	150	100%	0%
2021 - 2041	60	140	200	0	0	0	200	100%	0%
2021 - 2046	70	180	250	0	0	0	250	100%	0%
2021 - 2051	90	210	300	0	0	0	300	100%	0%

Source: Watson & Associates Economists Ltd., 2023.

Figure C-11
Rural System Employment Forecast, 2021 to 2051

Year	Primary Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2021	0	0	0	3,349	2,557	5,907	5,907	0%	100%
2026	0	0	0	3,405	2,582	5,987	5,987	0%	100%
2031	0	0	0	3,476	2,594	6,070	6,070	0%	100%
2036	0	0	0	3,508	2,679	6,186	6,186	0%	100%
2041	0	0	0	3,545	2,775	6,320	6,320	0%	100%
2046	0	0	0	3,569	2,891	6,461	6,461	0%	100%
2051	0	0	0	3,585	3,025	6,610	6,610	0%	100%
Incremental Growth									
2021 - 2026	0	0	0	56	24	81	81	0%	100%
2021 - 2031	0	0	0	127	36	164	164	0%	100%
2021 - 2036	0	0	0	159	121	280	280	0%	100%
2021 - 2041	0	0	0	196	217	414	414	0%	100%
2021 - 2046	0	0	0	220	334	554	554	0%	100%
2021 - 2051	0	0	0	236	468	703	703	0%	100%

Source: Watson & Associates Economists Ltd., 2023.



Appendix C-12
 County of Brant Employment
 by Primary Settlement Area and Rural System, 2051

Year	Paris	St. George	Burford	Rural System	County of Brant
Total Employment					
2021	8,300	1,200	600	6,000	16,100
2026	9,600	1,300	650	6,050	17,600
2031	10,700	1,500	700	6,100	19,000
2036	11,900	1,800	750	6,150	20,600
2041	13,100	2,200	800	6,200	22,300
2046	14,300	2,500	850	6,450	24,100
2051	15,500	3,000	900	6,600	26,000
Share of 2021 Employment	52%	7%	4%	37%	100%
Share of 2051 Employment	60%	12%	3%	25%	100%
Employment Growth					
2021 - 2051	7,200	1,800	300	600	9,900
Annual Growth Rate, 2021 to 2051	2.1%	3.1%	1.4%	0.3%	1.6%
Share of Employment Growth, 2021 to 2051	73%	18%	3%	6%	100%

Note: Figures may not add up precisely due to rounding.
 Source: Watson & Associates Economists Ltd., 2023.



Appendix C-4: County of Brant Employment Forecasts by Employment Location Type

Figure C-13
County of Brant
Employment by Type and Location Type, 2021

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,500	0	0	5,500	34%
Community Areas	4,700	0	0	0	4,700	29%
Rural Employment Areas	0	0	3,300	300	3,600	23%
Other Rural	0	0	0	2,200	2,200	14%
Total	5,700	4,500	3,300	2,600	16,000	100%
Share (%)	35%	28%	21%	16%	100%	-

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2023.

Figure C-14
County of Brant
Employment by Type and Location Type, 2051

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	2,000	9,200	0	0	11,200	43%
Community Areas	8,200	0	0	0	8,200	32%
Rural Employment Areas	0	0	3,600	400	4,000	15%
Other Rural	0	0	0	2,600	2,600	10%
Total	10,200	9,200	3,600	3,000	26,000	100%
Share (%)	39%	35%	14%	12%	100%	-

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2023.



Figure C-15
County of Brant
Employment by Type and Location Type, 2021 to 2051

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,700	0	0	5,700	57%
Community Areas	3,500	0	0	0	3,500	35%
Rural Employment Areas	0	0	300	100	400	4%
Other Rural	0	0	0	400	400	4%
Total	4,500	4,700	300	500	10,000	100%
Share (%)	45%	47%	3%	5%	100%	

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2023.



Figure C-16
County of Brant
Paris and St. George Urban Employment Areas
Employment by Type and Location Type by 2051

Urban Employment Areas	Paris Employment Areas	St. George Employment Areas	Urban Employment Area: Paris & St. George (Rounded)
Developed			
Employment	4,700	560	5,300
Employment Lands Employment (Industrial-Type)	3,720	500	4,200
Population-Related Employment (Commercial/Institutional)	980	60	1,000
Land Area, Gross ha	313	43	400
Density (jobs/ha)	15	13	13
Employment Area, % E.L.E.	79%	89%	79%
Employment Area, % P.R.E.	21%	11%	19%
2021 - 2051			
Employment	5,125	600	5,700
Employment Lands Employment (Industrial-Type)	4,150	540	4,700
Population-Related Employment (Commercial/Institutional)	975	60	1,000
Land Area, ha	342	46	388
Density	15	13	15
Employment Area, % E.L.E.	81%	90%	82%
Employment Area, % P.R.E.	19%	10%	18%
2051			
Employment	9,825	1,160	11,000
Employment Lands Employment (Industrial-Type)	7,870	1,040	8,900
Population-Related Employment (Commercial/Institutional)	1,955	120	2,100
Employment Area, % E.L.E.	80%	90%	81%
Employment Area, % P.R.E.	20%	10%	19%

Source: Watson & Associates Economists Ltd.



Appendix D

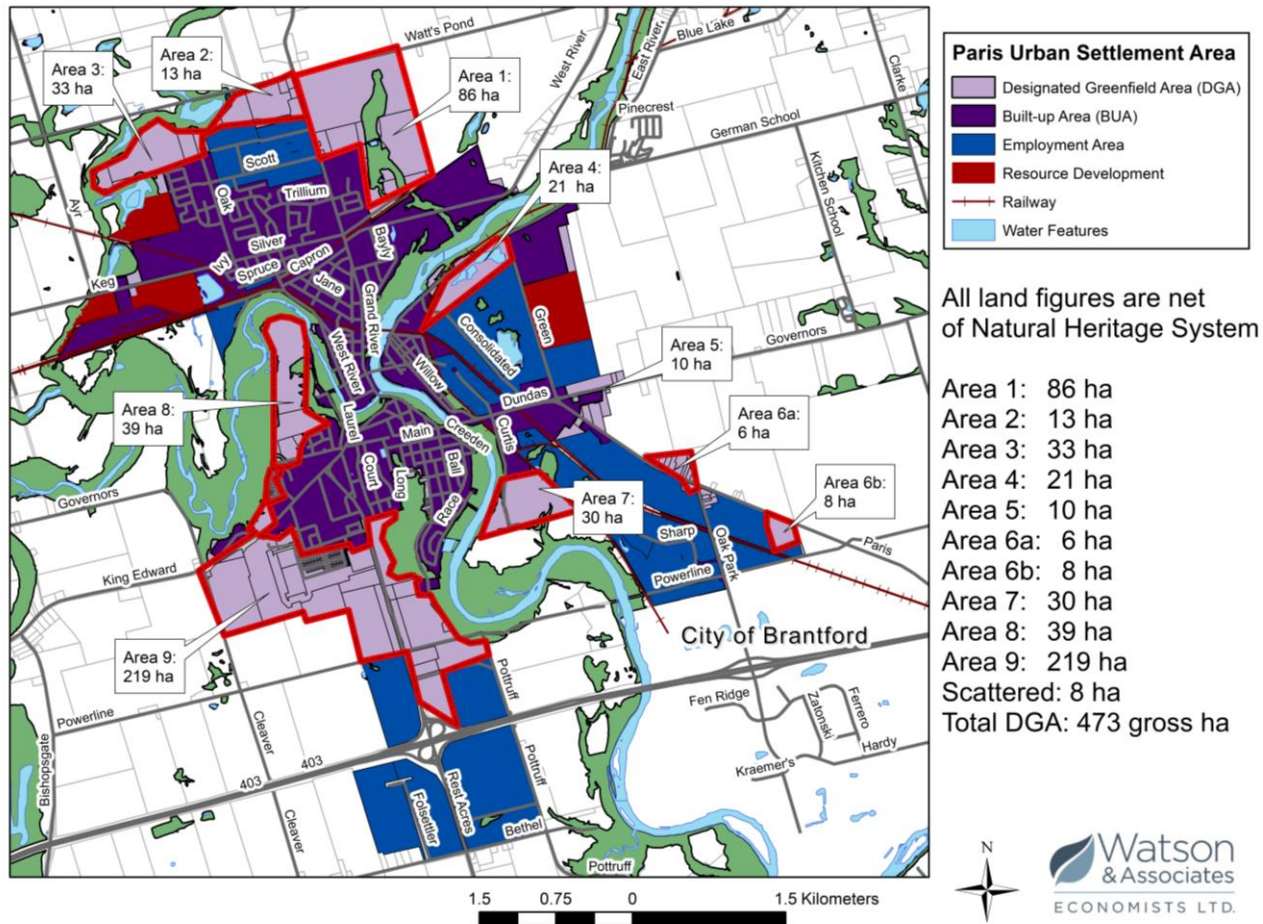
Community Area Land Supply Maps and Tables

Note: Appendix Figures D-1 through D-5 are derived from the County of Brant M.C.R. Draft Report, July 2021. No changes have been made to those figures.

Figures D-6 and D-7 provide a tabular update of the County's housing supply by planning status as of January 2023.



Appendix D-1: Paris Community Area D.G.A. Land Area, Gross ha



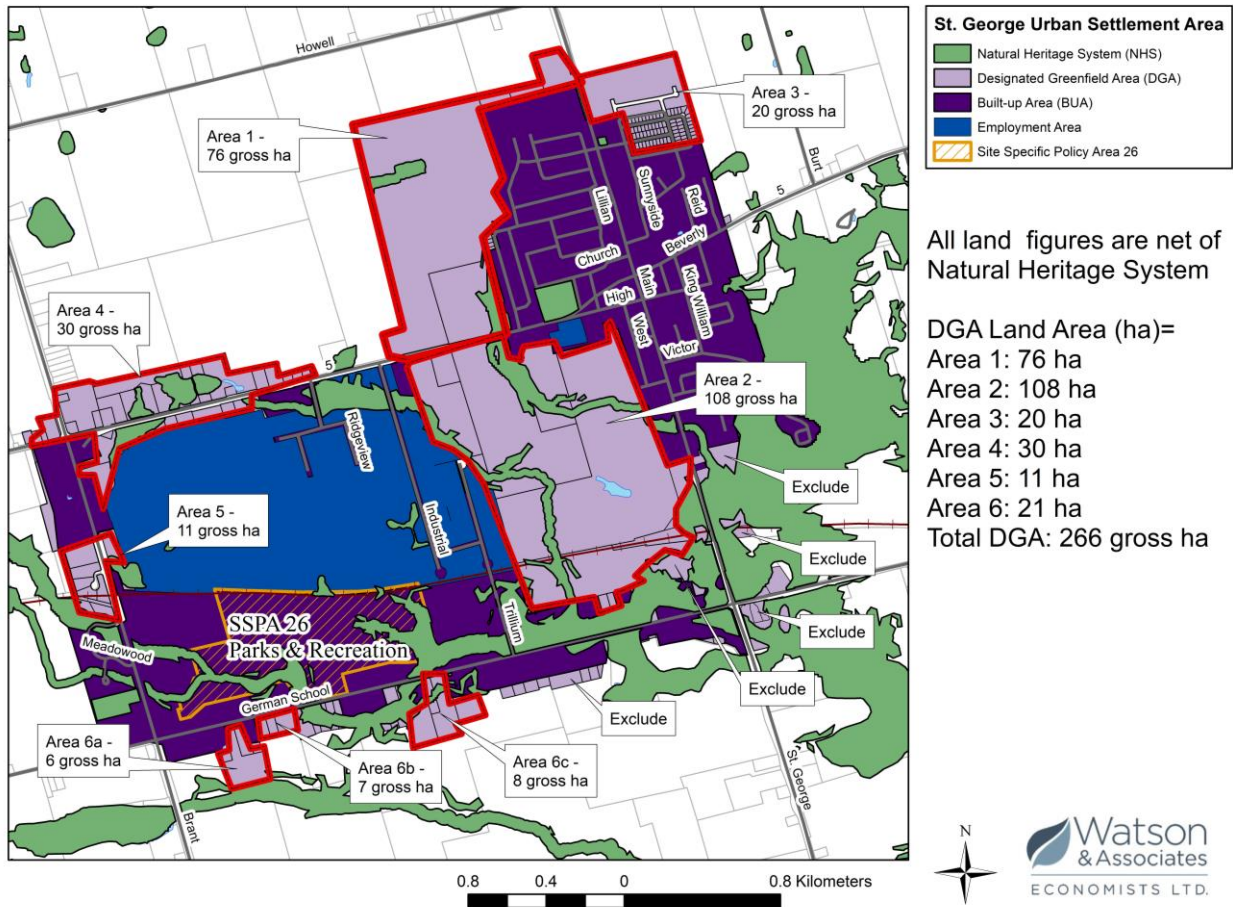
The D.G.A. within Paris has a total developable land area of 473 gross ha.

Land area, based on the total designated land area in the D.G.A., includes developed lands, vacant lands, parks/recreational lands and non-residential lands (except Employment Area lands).

Land area excludes Natural Heritage Systems, highways, utilities corridors and Employment Areas.



Appendix D-2: St. George Community Area D.G.A. Land Area, Gross ha



The D.G.A. within St. George has a total developable land area of 266 gross ha.

Land area, based on the total designated land area in the D.G.A., includes developed lands, vacant lands, parks/recreational lands and non-residential lands (except Employment Area lands).

Land area excludes Natural Heritage Systems, highways, utilities corridors and Employment Areas.



Appendix D-3: D.G.A. Developed and Approved Analysis, as of 2020

Paris

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	312	99	0	411	45	1,270	1,740	39
Draft Approved/Registered	1,712	612	919	3,243	167	8,850	9,100	55
Developed & Draft Approved/Registered	2,024	711	919	3,654	211	10,120	10,840	51

St. George

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	105	0	0	105	9	350	365	39
Draft Approved/Registered	1,957	232	592	2,781	160	8,100	8,380	52
Developed & Draft Approved/Registered	2,062	232	592	2,886	169	8,450	8,745	52

Paris and St. George

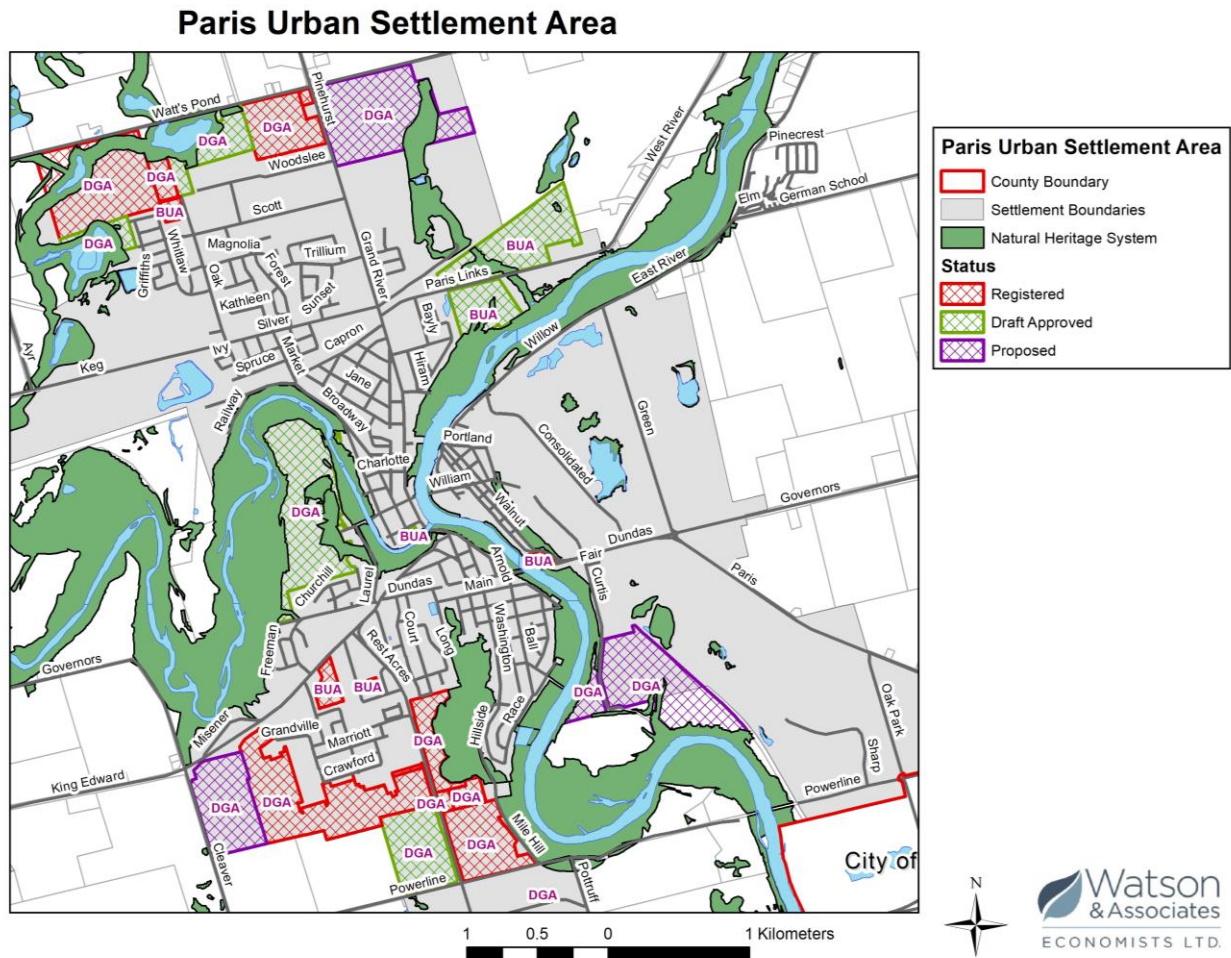
Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed - Paris and St. George	417	99	0	516	54	1,620	2,100	39
Draft Approved/Registered	3,669	844	1,511	6,024	326	16,950	17,500	54
Developed & Draft Approved/Registered	4,086	943	1,511	6,540	380	18,570	19,600	52

Note: This was completed in the County of Brant M.C.R. Draft Report, July 2021 to provide direction on the appropriate Community Area density for the County to target. As identified, the County of Brant as of January 2020 is achieving an average of 52 people and jobs/ha based on what has been developed and what has been approved. This is considered to represent an appropriate sample of the Community Area density.

Source: Watson & Associates Economists Ltd.



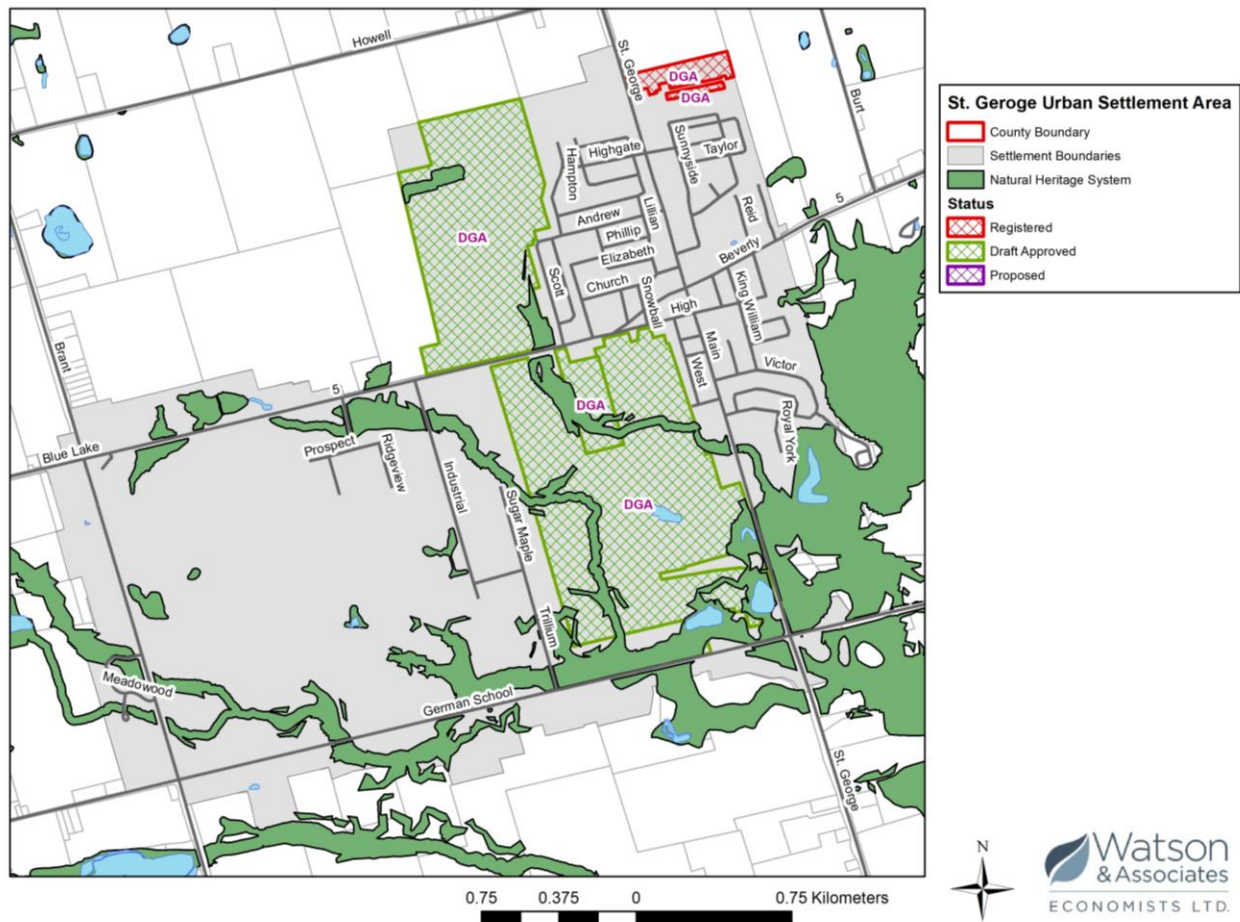
Appendix D-4: Active Residential Development in Paris (D.G.A./B.U.A.), as of 2020



This map, prepared for the 2021 County of Brant M.C.R. Draft Report, identifies the approximate land area of sites with residential development applications that are currently in the planning process, including approved and proposed developments as of January 2020.



Appendix D-5: Active Residential Development in St. George (D.G.A./B.U.A.) as of 2020



This map, prepared for the 2021 County of Brant M.C.R. Draft Report, identifies the approximate land area of sites with residential development applications currently in the planning process, including approved and proposed developments as of January 2020.



Figure D-6
County of Brant
Paris Primary Settlement Area (includes B.U.A. and D.G.A.)
Total Housing Unit Supply Potential on Designated Community Area Lands
as of January 2023

Status	Low-density Housing Units	Medium-density Housing Units	High-density Housing Units	Total Housing Units
Registered Unbuilt	625	184	0	809
Draft Approved	1,561	722	542	2,825
Proposed Units on Designated Lands	0	0	371	371
Other Potential on Vacant D.G.A. Lands	468	0	0	468
Intensification Potential on Vacant Lands with No Application (low range)	0	0	1,739	1,739
Total Housing Unit Supply Potential	2,654	906	2,652	6,212
Building Permits Issued Not Included in Census	404	265	24	693
Total Supply, Adjusted for Building Permits	3,058	1,171	2,676	6,905
Housing Unit Forecast, 2021 to 2051	2,020	870	1,325	4,215
Housing Unit Supply Potential vs. Housing Forecast, 2021 to 2051	1,038	301	1,351	2,690

Note: Housing unit supply potential excludes proposed development that involve a re-designation to accommodate residential uses (e.g., Employment Area conversions).

Source: Watson & Associates Economists Ltd., 2023 based on housing supply information from the County of Brant as of January 2023.



Figure D-7
County of Brant
St. George Primary Settlement Area
Total Housing Unit Supply Potential on Designated Community Area Lands
as of January 2023

Status	Low-density Housing Units	Medium-density Housing Units	High-density Housing Units	Total Housing Units
Registered Unbuilt	0	0	0	0
Draft Approved	1,783	430	1,230	3,443
Proposed Units on Designated Lands	94	87	58	239
Other Potential on Vacant D.G.A. Lands	402	282	161	845
Intensification Potential on Vacant Lands with No Application (low range)	0	0	1,079	1,079
Total Housing Unit Supply Potential	2,279	799	2,528	5,606
Building Permits Issued Not Included in Census	8	0	0	8
Total Supply, Adjusted for Building Permits	2,287	799	2,528	5,614
Housing Unit Forecast, 2021 to 2051	985	135	490	1,610
Housing Unit Supply Potential vs. Housing Forecast, 2021 to 2051	1,302	664	2,038	4,004

Note: Housing unit supply potential excludes proposed development that involve a re-designation to accommodate residential uses (e.g., proposed application on lands designated Park and Recreation Use).

Source: Watson & Associates Economists Ltd., 2023 based on housing supply information from the County of Brant as of January 2023.



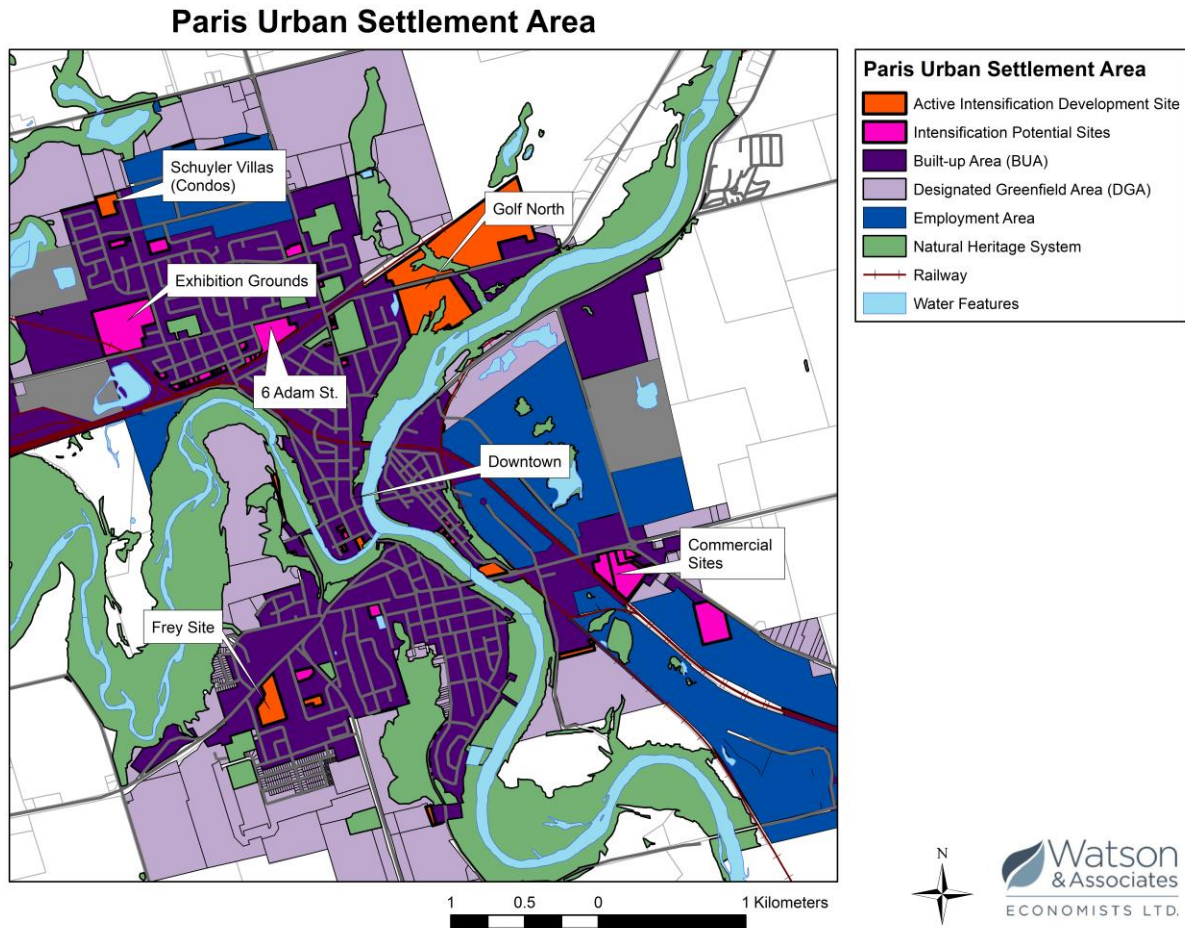
Appendix E

Intensification Opportunities in Paris and St. George

Note: The following appendix is derived from the County of Brant M.C.R. Draft Report, July 2021, and no changes have been made.

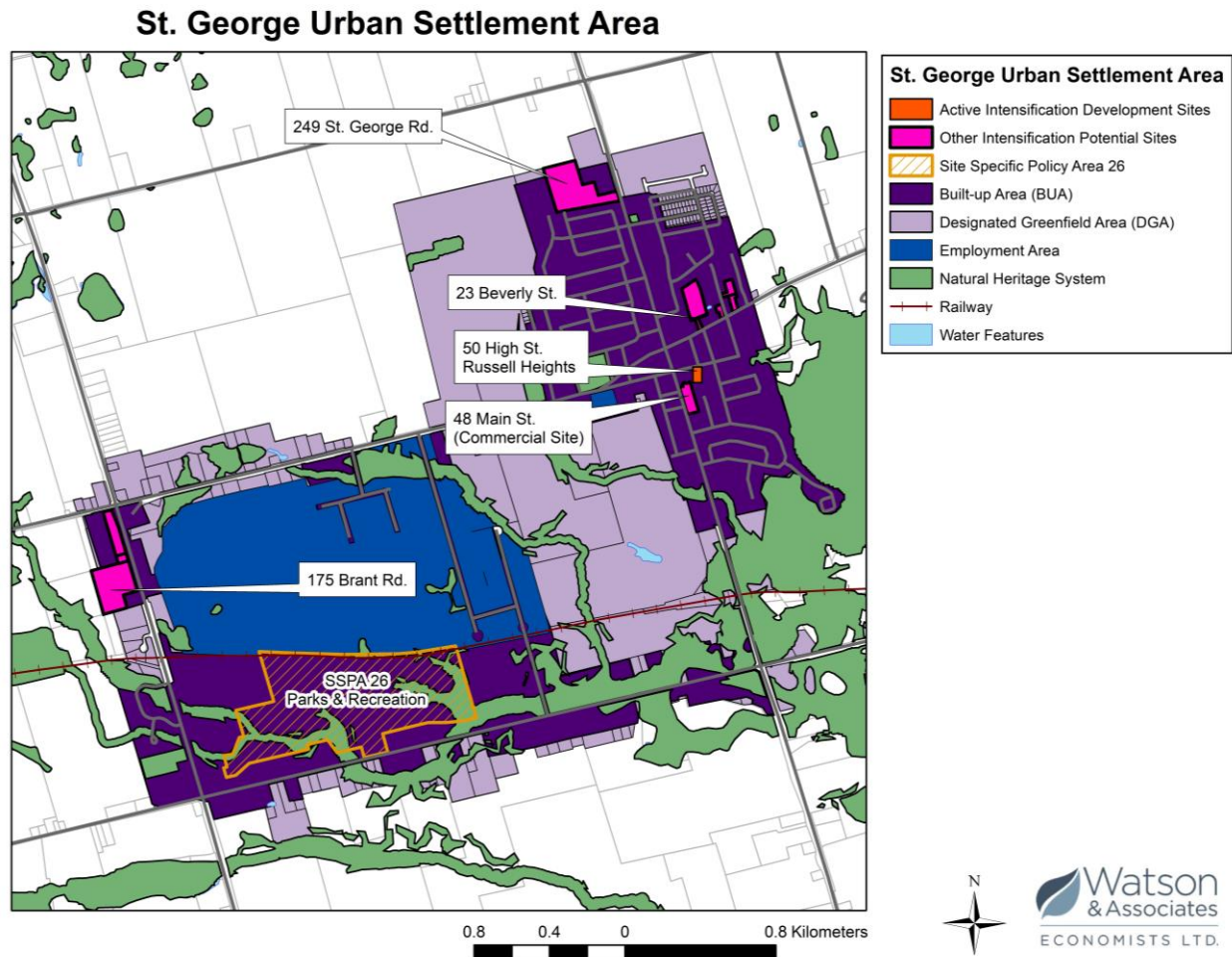


Appendix E-1: Intensification Opportunities to Accommodate Housing in Paris





Appendix E-2: Intensification Opportunities to Accommodate Housing in St. George





Appendix F

Commercial Built Space and Land Inventory in Paris and St. George

Note: The following appendix is derived from the County of Brant M.C.R. Draft Report, July 2021, and no changes have been made.



Appendix F-1: Commercial Built-Space Inventory in Paris

Dundas St./Paris Rd. Corridor

Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
34 Paris Rd	Vacant Building	Vacant	Vacant	700	0.01	0.5	1%	0	0
74 & 82 Dundas St	Harveys and Swiss Chalet	Food Services	Free-Standing	8,200	0.08	2.2	3%	20	9
30 Paris Rd	Paris Country Grill & Wine	Food Services	Free-Standing	2,900	0.03	0.7	4%	10	15
772 Governors Rd E	Furniture Store and Art Studio	Furniture Store	Free-Standing	4,000	0.04	0.7	5%	10	14
22 Paris Rd	Camp 31	Food Services	Free-Standing	2,300	0.02	0.3	6%	10	29
151 Dundas St. E	Tim Horton's	Food Services	Free-Standing	2,500	0.02	0.3	7%	10	29
156 Dundas St	EggsMart	Food Services	Free-Standing	1,900	0.02	0.2	7%	5	21
135 & 203 Dundas St E	Cardlock	Automotive Sales & Services	Free-Standing	7,700	0.07	0.7	10%	1	1
142 Dundas St E	Paris Factory Rides Automotive	Automotive Sales & Services	Free-Standing	5,600	0.05	0.4	12%	10	24
103 Dundas St E	Dealership	Automotive Sales & Services	Free-Standing	11,100	0.10	0.8	13%	30	40
15 Paris Rd	Motel	Accommodations	Free-Standing	6,700	0.06	0.4	16%	20	53
123 Dundas St E	Auto Service	Automotive Sales & Services	Free-Standing	2,900	0.03	0.2	16%	10	55
127 Dundas St E	Esso Gas Station	Automotive Sales & Services	Free-Standing	1,900	0.02	0.1	18%	2	18
65 Dundas St	PrimaCare Community Family H	Health Care	Medical Clinic	14,700	0.14	0.6	22%	40	65
12 Paris Rd	Rose Court Motel	Accommodations	Other	4,800	0.04	0.2	26%	5	29
71 Dundas St	No Frills	Food Store	Free-Standing	30,000	0.28	1.0	27%	80	76
72 Dundas St	Starbucks	Food Services	Free-Standing	3,000	0.03	0.1	28%	10	99
535 Paris Road	Brantford Granite & Quartz	Building Supplies Stores	Free-Standing	28,800	0.27	1.0	27%	20	20
sub-Total				139,700	1	10	12%	293	28

Source: Watson & Associates Economists Ltd.



Paris Downtown Core

Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
121 Grand River St. N	Vacant Building	Vacant	Vacant Storefront	800	0.01	0.1	15%	0	0
120 Grand River St. N	Dental Office	Health Care	Medical Clinic	4,000	0.04	0.2	20%	10	53
139 Grand River St. N	Medical Clinic	Health Care	Medical Clinic	9,800	0.09	0.5	20%	20	44
25 Mechanic Street	LCBO	Beer, Wine & Liquor Store	Free-Standing	5,500	0.05	0.2	21%	10	41
127 Grand River St. N	Vacant Building	Vacant	Vacant Storefront	1,100	0.01	0.0	26%	0	0
138 Grand River St. N	Spa	Personal Services	Other	3,400	0.03	0.1	35%	10	111
The Paris Wincey Mills	Mixed-Use Complex	Office	Mixed-Use Complex	31,000	0.29	0.7	38%	60	80
105 - 119 Grand River St	6 Storefronts	Various	Storefront	7,700	0.07	0.2	40%	20	111
19, 21, 23, 27, 29 & 33 W	Storefronts	Various	Storefront	12,700	0.12	0.2	49%	30	124
106 Grand River St N	Arlington Hotel	Accommodations	Hotel	7,200	0.07	0.1	57%	5	43
86, 80, 72 & 68 Grand Ri	Storefronts	Various	Storefront	17,600	0.16	0.2	65%	40	161
1 to 97 Grand River St N	Storefronts	Various	Storefront	42,800	0.39	0.6	71%	90	164
66 Grand River St N	Brant County Office	Institutional Use in Retail	Institutional	18,300	0.07	0.1	79%	40	449
30, 32, 38, 40, 44, 48, 50	Storefronts	Various	Storefront	19,700	0.18	0.2	93%	40	207
6, 8, 10, 14, 16, 20, 24 &	Storefronts	Various	Storefront	15,900	0.15	0.2	98%	30	197
				197,500	1.72	4	48%	405	113

Grand River St. N. Corridor

Node	Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
Grand River St. N.	340 Grand River St. N (E	Car Wash & Pizza Restaurant	Food Services/Automotive Services	Free-Standing	4,700	0.0	0.6	7%	5	8
Grand River St. N.	304 Grand River St. N (E	Tim Horton's	Food Services	Free-Standing	2,500	0.0	0.2	9%	10	45
Grand River St. N.	308 Grand River St. N (E	Employment Area Land Site)	Food Services	Plaza	5,900	0.0	0.1	38%	10	167
Grand River St. N.	307 Grand River St. N	McDonalds	Food Services	Free-Standing	3,500	0.0	0.3	12%	10	38
Grand River St. N.	303 Grand River St. N	Dollarama	General Merchandise	Free-Standing	10,500	0.1	0.7	14%	11	16
Grand River St. N.	184 Grand River St. N	Funeral Home	Other	Other	5,000	0.05	0.3	15%	5	16
Grand River St. N.	279 Grand River St. N	Shell	Automotive Sales & Services	Free-Standing	2,500	0.0	0.2	15%	2	13
Grand River St. N.	246 & 248 Grand River S	Home Building Centre	Building Supplies Stores	Free-Standing	11,800	0.11	0.5	20%	30	56
Grand River St. N.	280 & 300 Grand River S	Canadian Tire	General Merchandise	Plaza	66,500	0.6	2.4	26%	130	54
Grand River St. N.	321 Grand River St. N	Paris Vet Clinic	Professional Services	Office	5,500	0.1	0.2	27%	10	52
Grand River St. N.	271 Grand River St. N	Subway	Food Services	Plaza	5,100	0.05	0.1	36%	16	114
Grand River St. N.	315 Grand River St. N	Sobeys	Food Store	Free-Standing	51,000	0.5	1.3	37%	100	78
Grand River St. N. - sub-Total, including commercial sites on designated Employment Area Lands					174,500	2	7	23%	339	49
Grand River St. N. - sub-Total, excluding commercial sites on designated Employment Area Lands					161,400	1.50	6	25%	314	52



Other

Node	Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
Dumfries St.	27 Dumfries St.	The Grand Bayou Cajun Kitcher	Food Services	Free-Standing	3,700	0.03	0.2	19%	3	17
Dumfries St.	28 Dumfries St.	KFC	Food Services	Free-Standing	2,000	0.02	0.1	31%	10	167
Dumfries St.	53 Dumfries St.	Vacant Building	Vacant	Vacant	4,900	0.05	0.1	50%	0	0
Other	93 King Edward St	Gas Station	Automotive Sales & Services	Free-Standing	2,500	0.02	0.5	5%	2	4
Other	1105 Rest Acres Rd	Funeral Home	Other	Other	7,700	0.07	0.8	9%	10	13
Other	14 Market St.	Wrights Variety Store	Convenience Store	Free-Standing	4,000	0.04	0.2	22%	2	12
Other	32 Dundas St W	Little Paris Bread	Food Services	Storefront	2,000	0.02	0.1	25%	5	63
Other	3 Elm St	Restaurant & Office	Food Services	Office	15,000	0.10	0.3	34%	40	138
Other	7 Market St.	Titos Pizza	Food Services	Free-Standing	1,000	0.04	0.1	64%	5	86
Other	1 Grand River St. N	Wendy's General Store	Convenience Store	Free-Standing	3,300	0.03	0.0	77%	2	50
Other - sub-Total					46,100	0.42	2.20	19%	79	36
Rest Acres Rd.	1084 Rest Acres Rd	Cobblestone Pharmacy/Dental/N	Health Care	Plaza	40,800	0.38	1.5	26%	75	51
Rest Acres Rd.					40,800	0.38	1	26%	75	51
Total	Total Commercial Building Space, Sq.ft. (G.L.A.)				585,500	4.90	22	23%	1,170	54

Source: Watson & Associates Economists Ltd.



Appendix F-2: Commercial Built-Space Inventory in St. George

Corridor	Largest Tenant of Building	G.L.A., Sq.ft.
Brant Rd.	Tim Hortons	2,600
Brant Rd.	Gas Station	1,000
Brant Rd.	Gas Station	1,000
Brant Rd.	Southern Pride Poultry	3,100
Brant Rd.	Ken's Auto	6,000
Brant Rd. sub-Total		13,700
Core	Foodland	12,000
Core	Esso Gas Station	1,000
Core	BMO Bank	2,500
Core	Auto Repair	3,600
Core	Car Wash	3,500
Core	Storefronts	9,700
Core	Storefronts	13,100
Core	2 Converted Houses	6,000
Core	41 Main St. Complex	5,000
Core	Plaza	11,000
Core	Plaza	4,300
Core	Plaza	4,500
Core sub-Total		76,200
Total St. George		89,900

Source: Watson & Associates Economists Ltd.



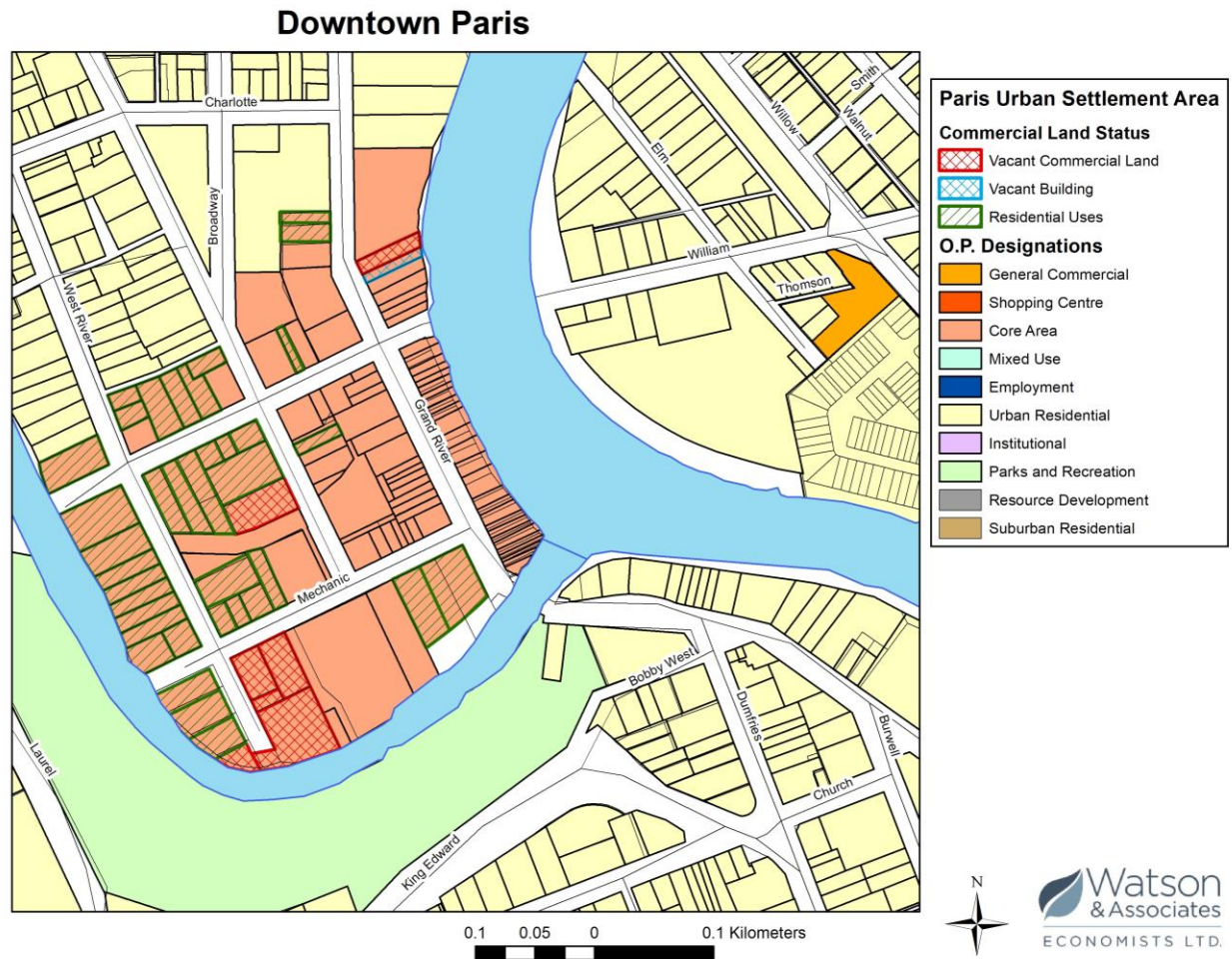
Appendix G

Designated Commercial Land Supply

Note: The following appendix is derived from the County of Brant M.C.R. Draft Report, July 2021, and no changes have been made to update the supply.



Appendix G-1: Designated Commercial Land Supply in Downtown Paris by Status

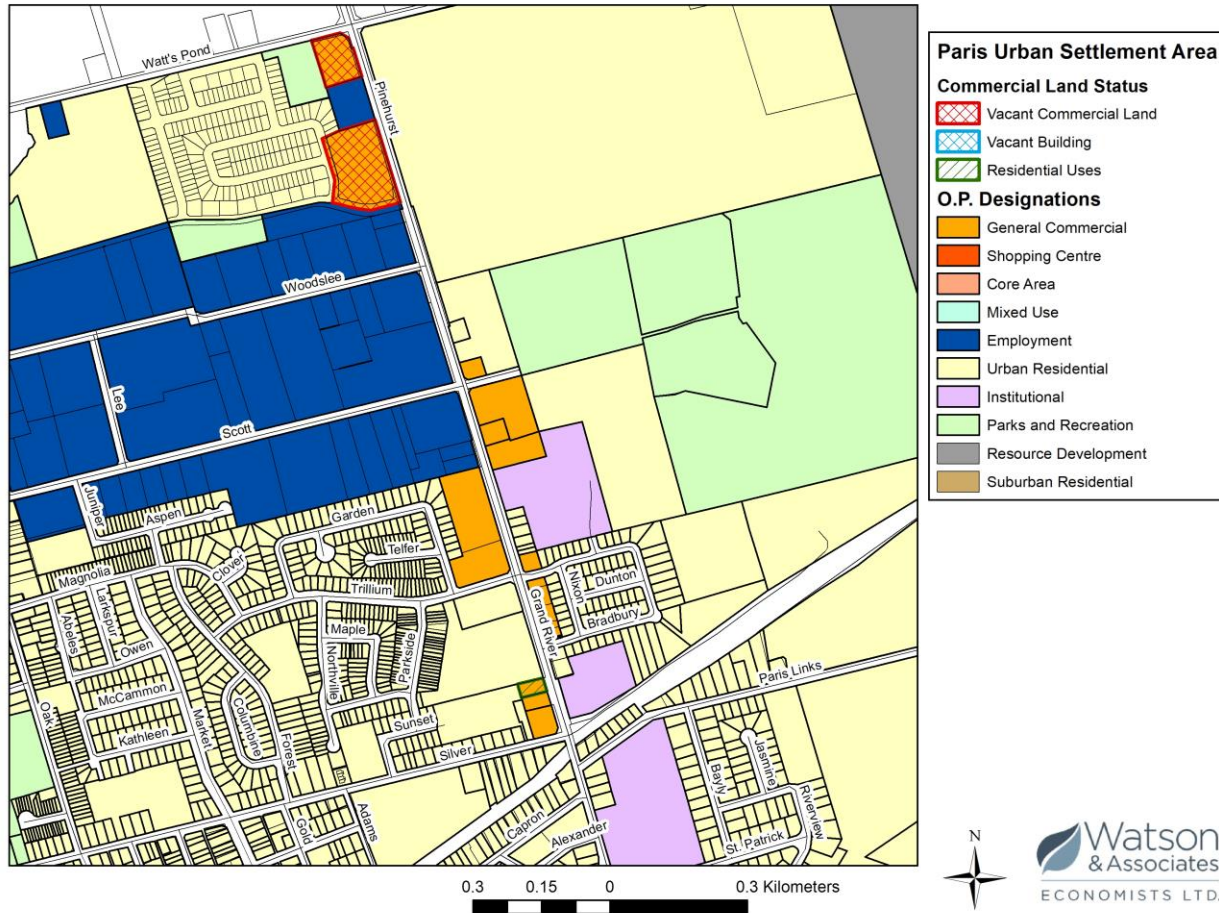


Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix G-2: Designated Commercial Land Supply in Grand River St. N. Corridor by Status

Grand River St. N. Commercial Corridor

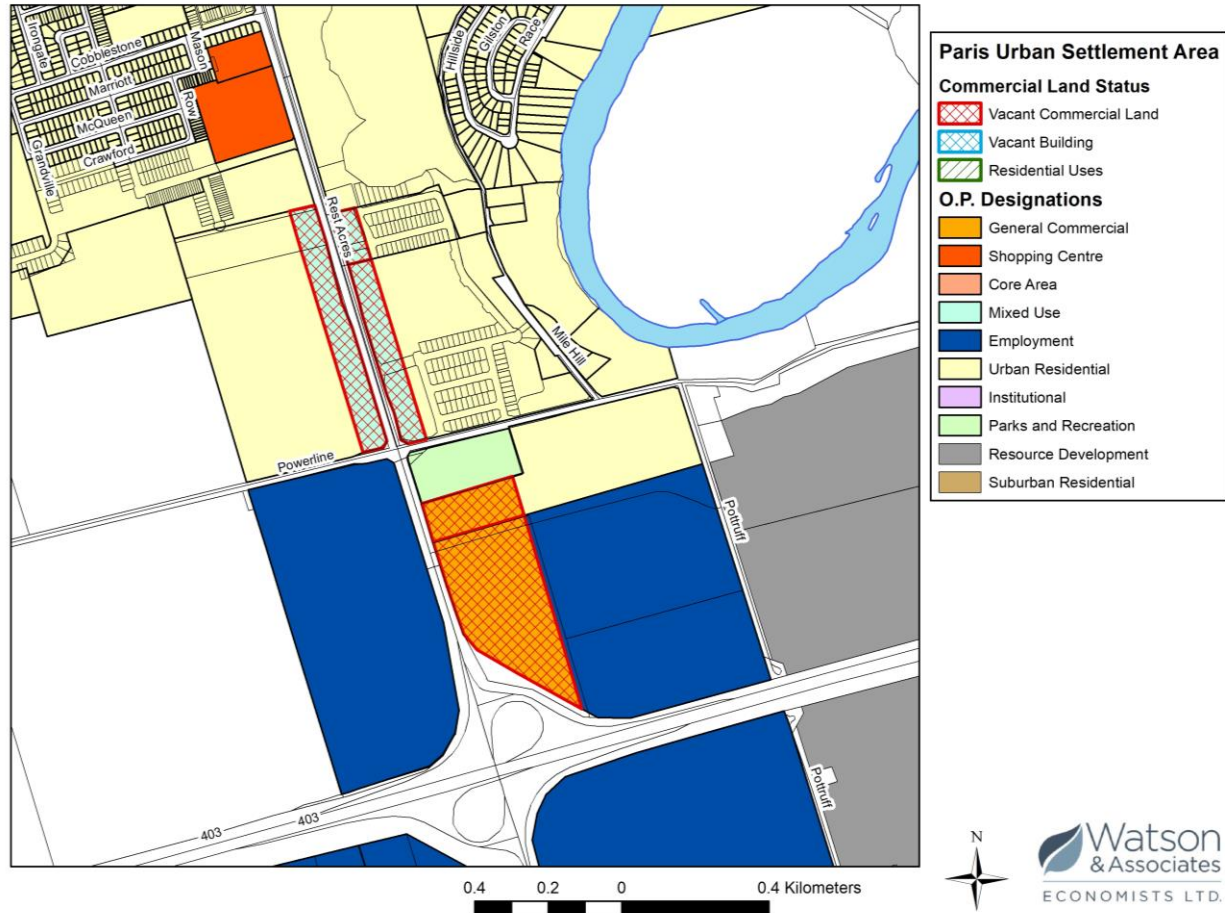


Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix G-3: Designated Commercial Land Supply in Rest Acres Road Corridor by Status

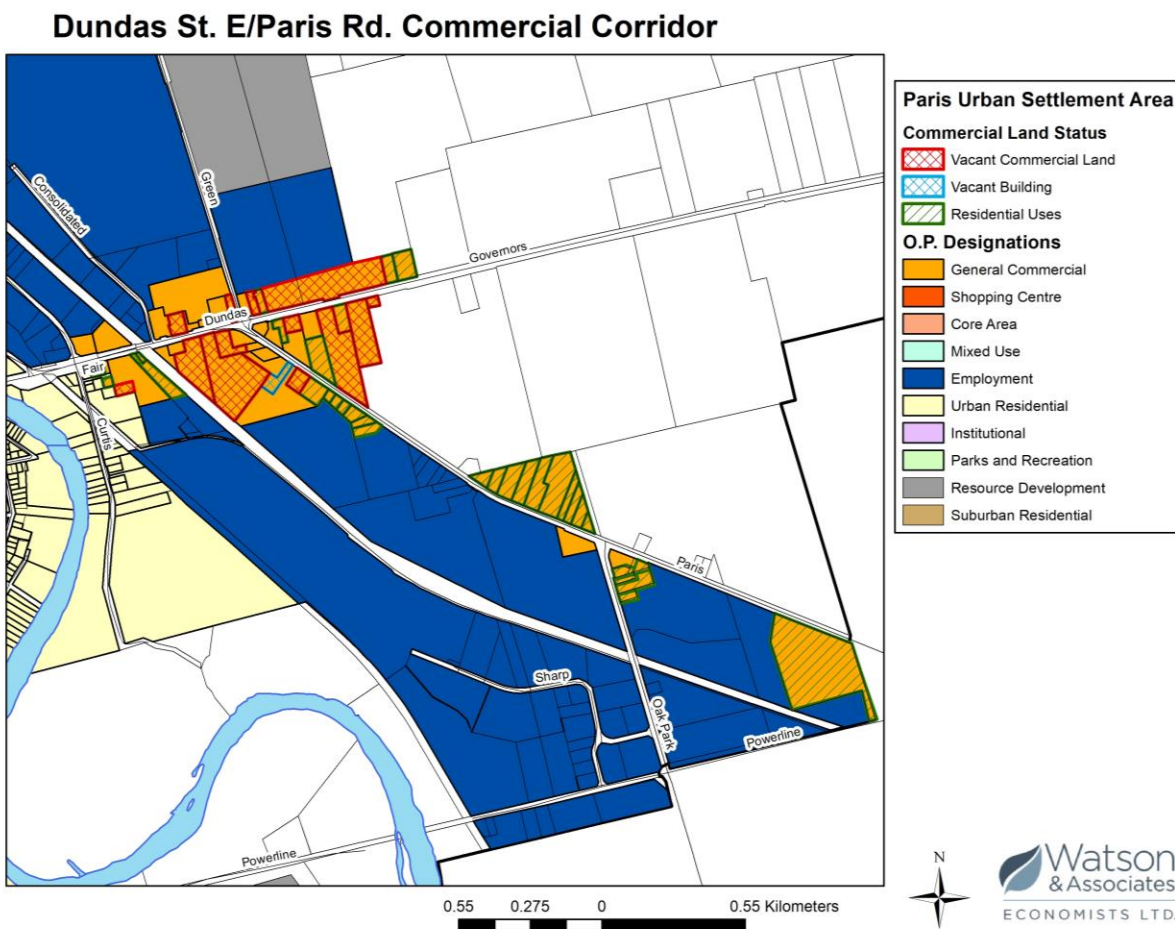
Rest Acres Rd. Commercial Corridor



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix G-4: Designated Commercial Land Supply in Dundas Rd. and Paris Rd. Corridor by Status

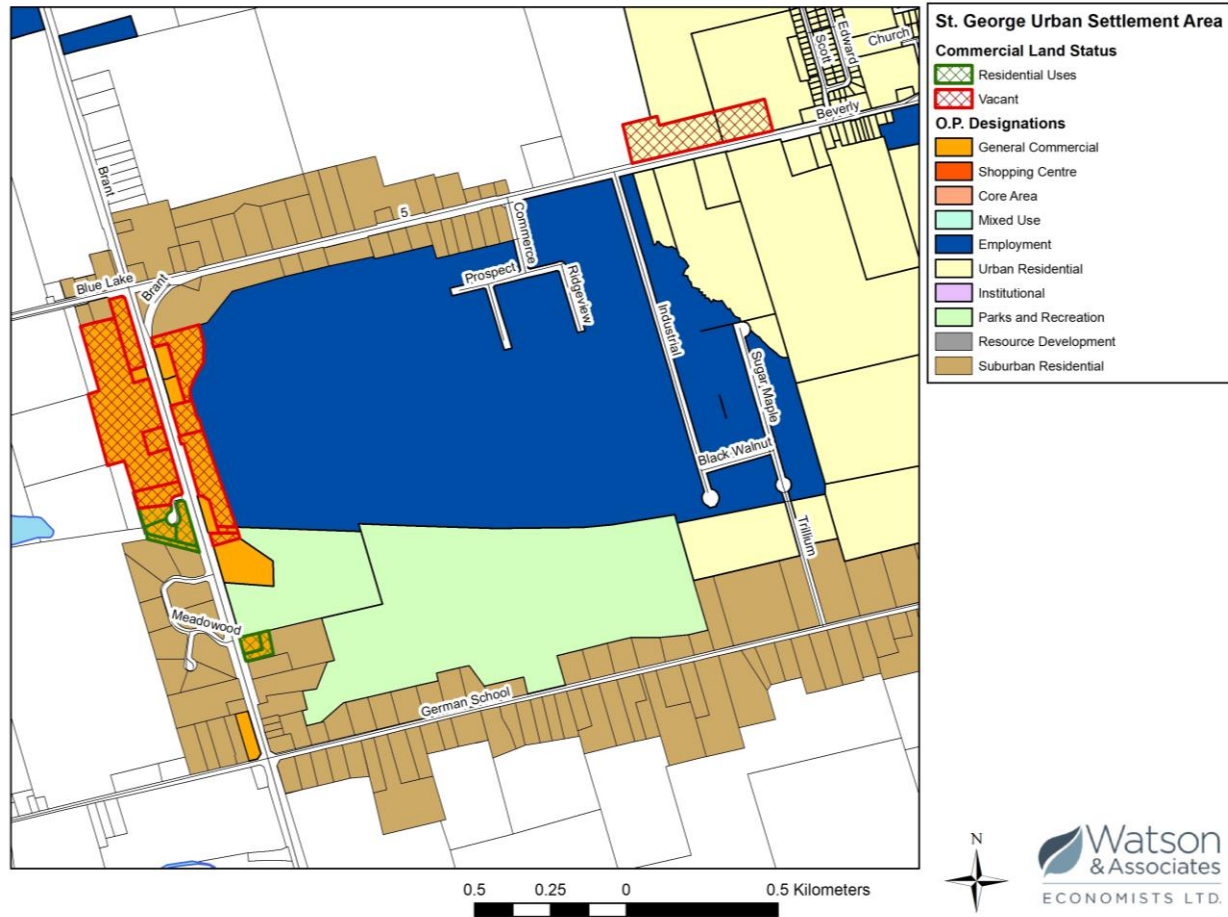


Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix G-5: Designated Commercial Land Supply in Brant Road Corridor by Status

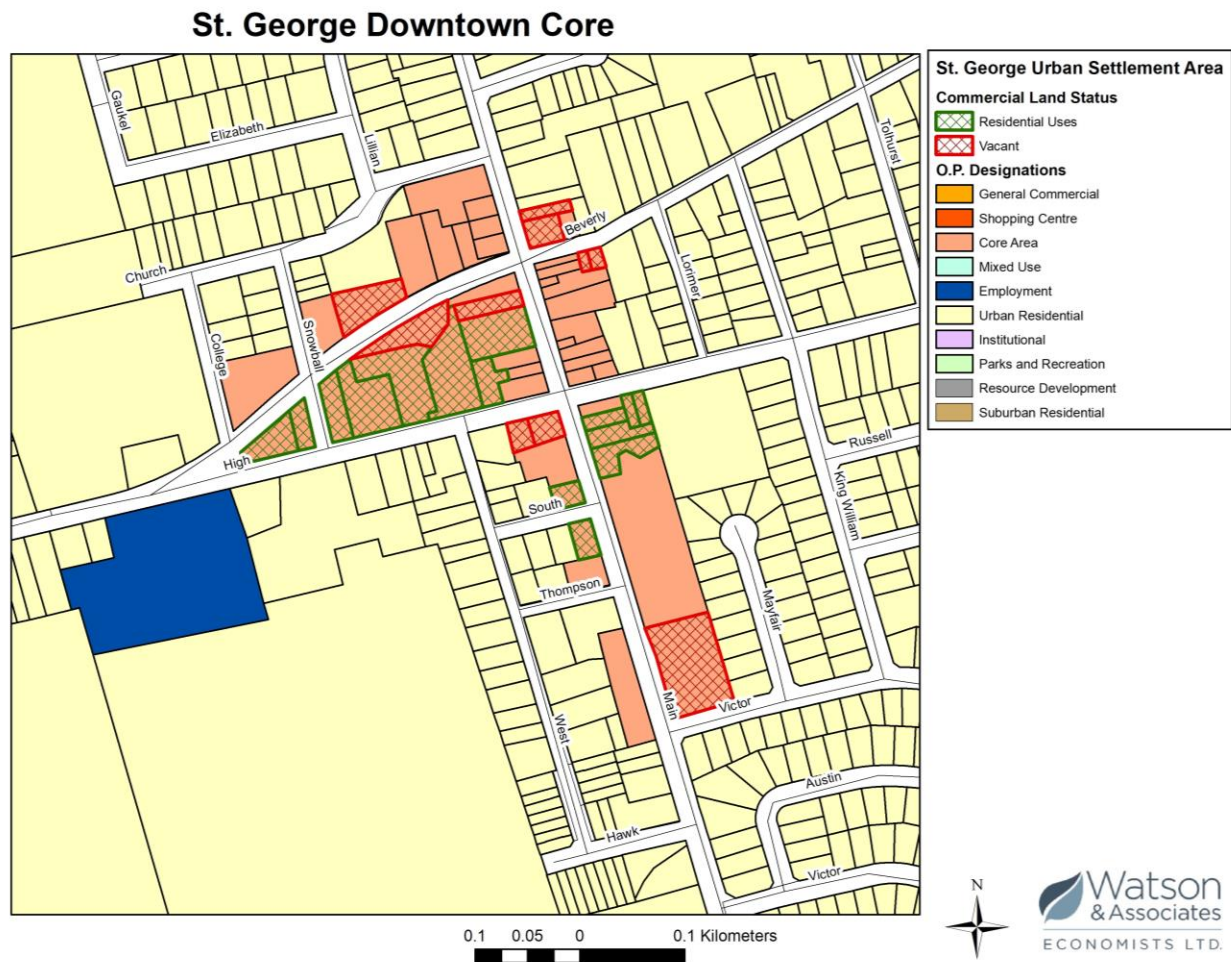
St. George - Brant Rd. and Mixed Use Blocks



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix G-6: Designated Commercial Land Supply in St. George Core by Status



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix H

Urban Employment Area Developed and Vacant Land Supply

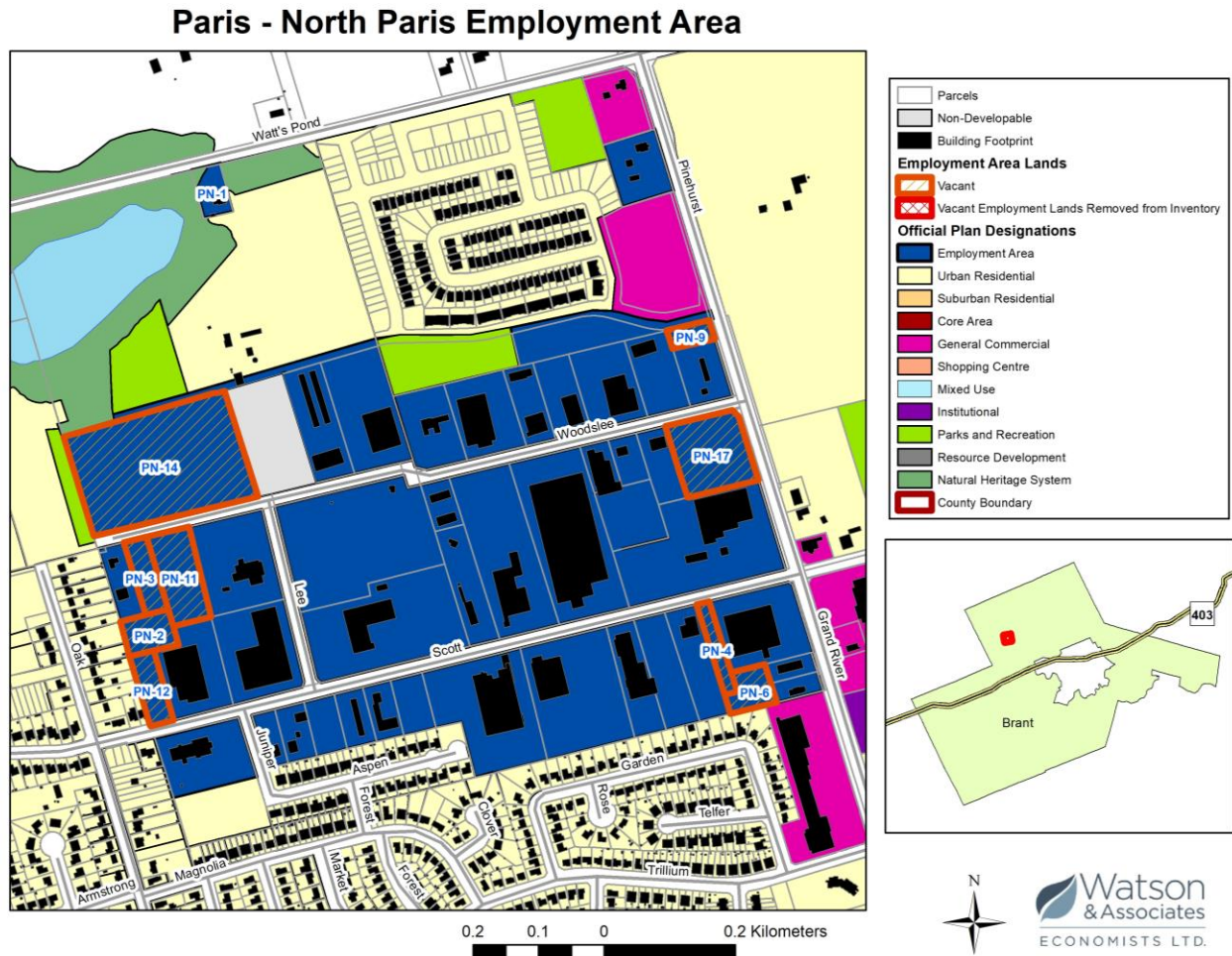
Note: The following appendix includes mapping that is derived from the County of Brant M.C.R. Draft Report, July 2021. Notes below the maps indicate parcels that have been absorbed since the County of Brant M.C.R. Draft Report, July 2021. Employment Areas in Burford have been added to the urban land Employment Area supply.

An updated tabular summary of the vacant Urban Employment Area Land Supply is provided based on the status of Employment Area land as of January 2023.



Appendix H: Employment Area Developed and Vacant Land Supply

Figure H-1
Paris North Employment Area



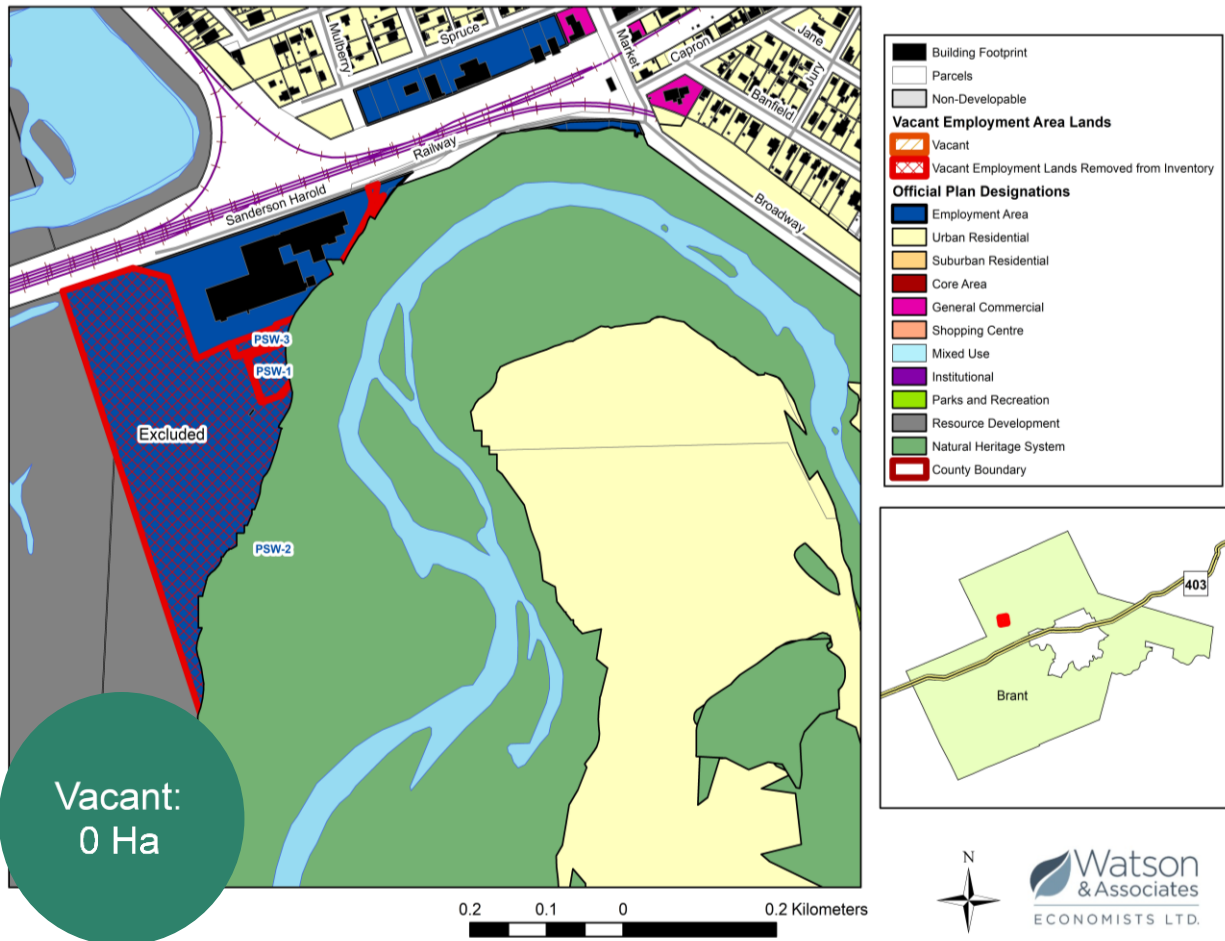
Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

Changes to supply since the County of Brant M.C.R. Draft Report, July 2021:

- PN-14: is recommended to be converted to Non-Employment Use (4.2 ha); and
- PN-17: has been absorbed (1.3 ha).



Figure H-2
Paris Southwest Employment Area



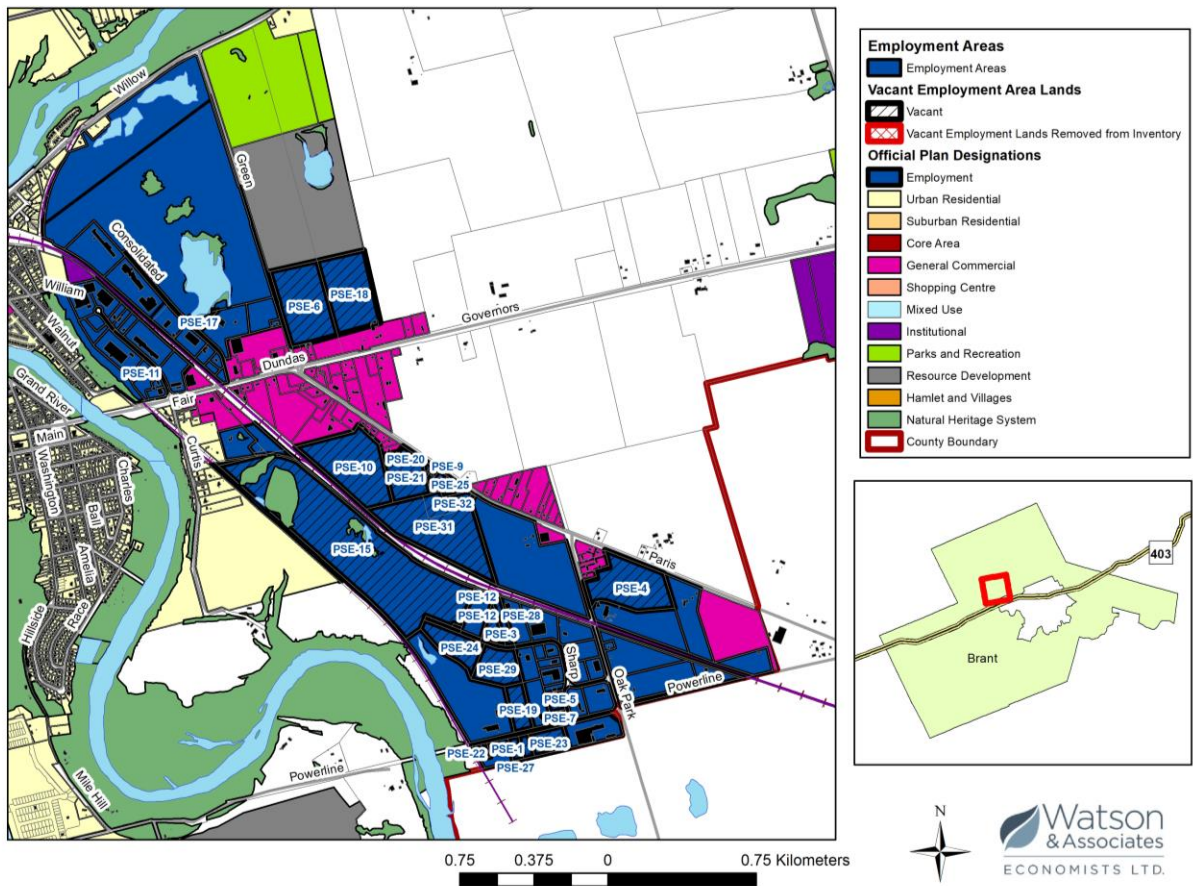
Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

Changes to supply since the County of Brant M.C.R. Draft Report, July 2021:

- No changes.



Figure H-3
Paris Southeast Employment Area



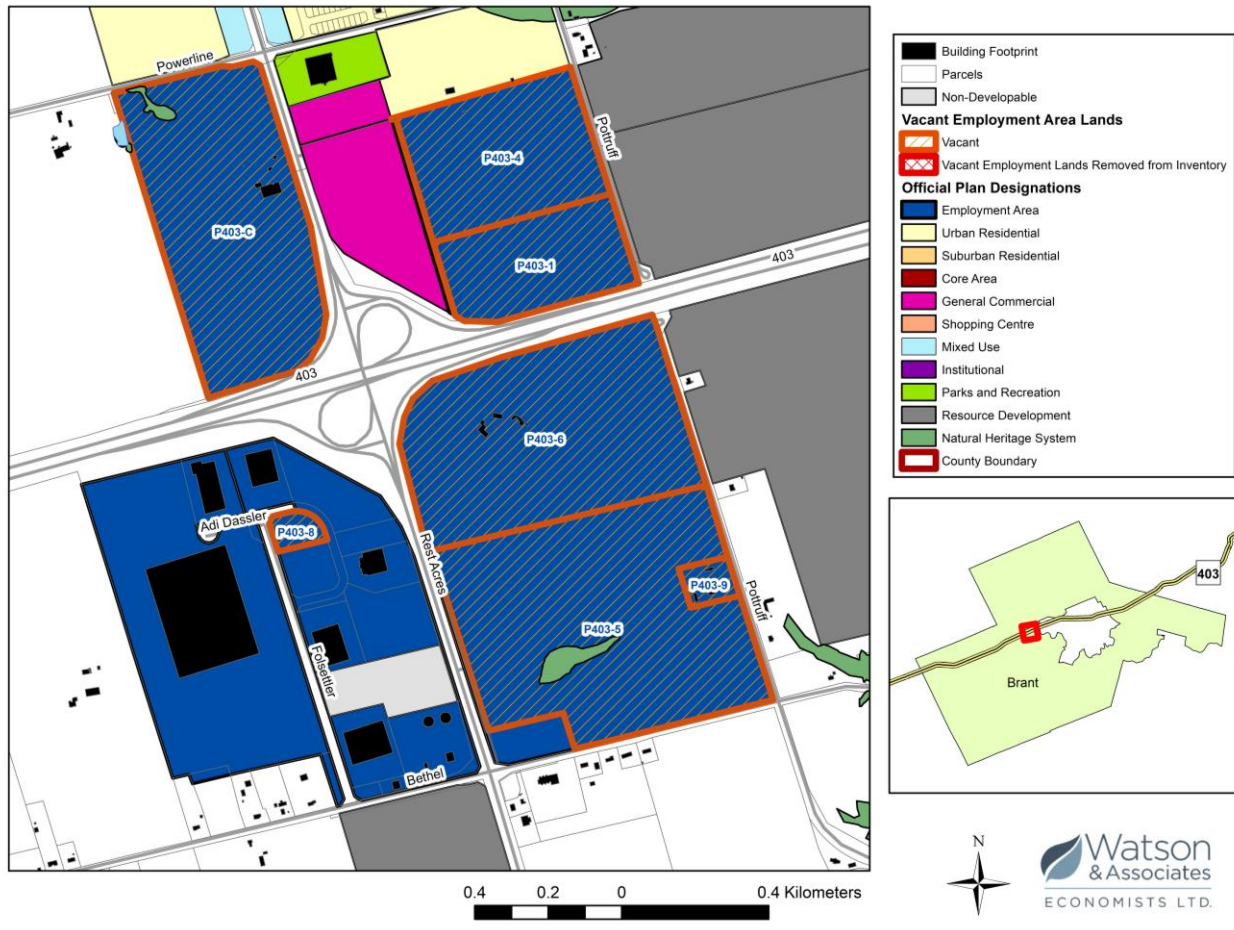
Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

Changes to supply since the County of Brant M.C.R. Draft Report, July 2021:

- No changes.



Figure H-4
Paris Highway 403 Business Park



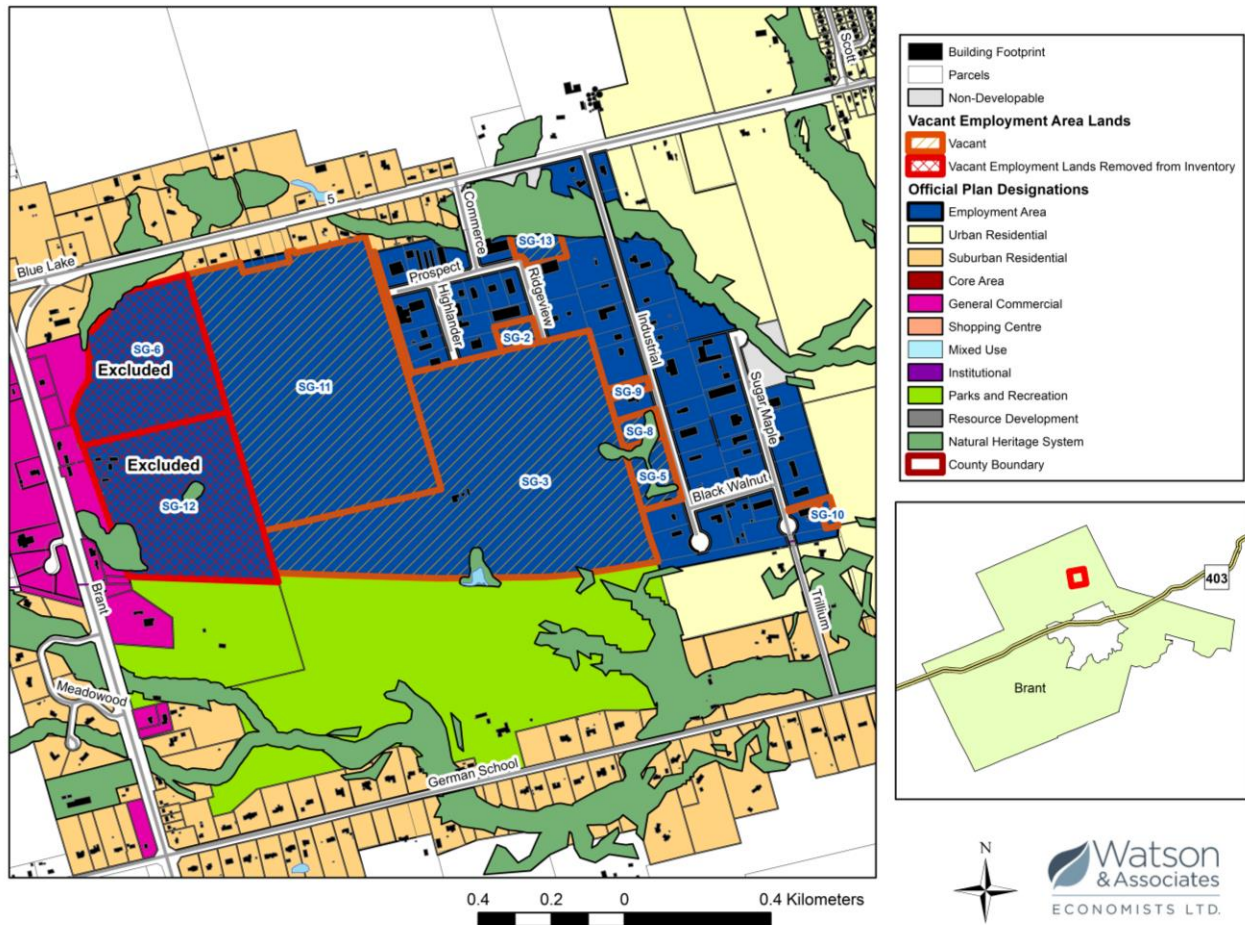
Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

Changes to supply since the County of Brant M.C.R. Draft Report, July 2021:

- P403-1: has been absorbed (12.6 ha);
- P403-8: has been absorbed (1.2 ha); and
- P403-4: an adjustment has been made to the vacant site to reflect a correction to delineation of the Employment Area designation (reduced to 9 ha).



Figure H-5
St. George Employment Area



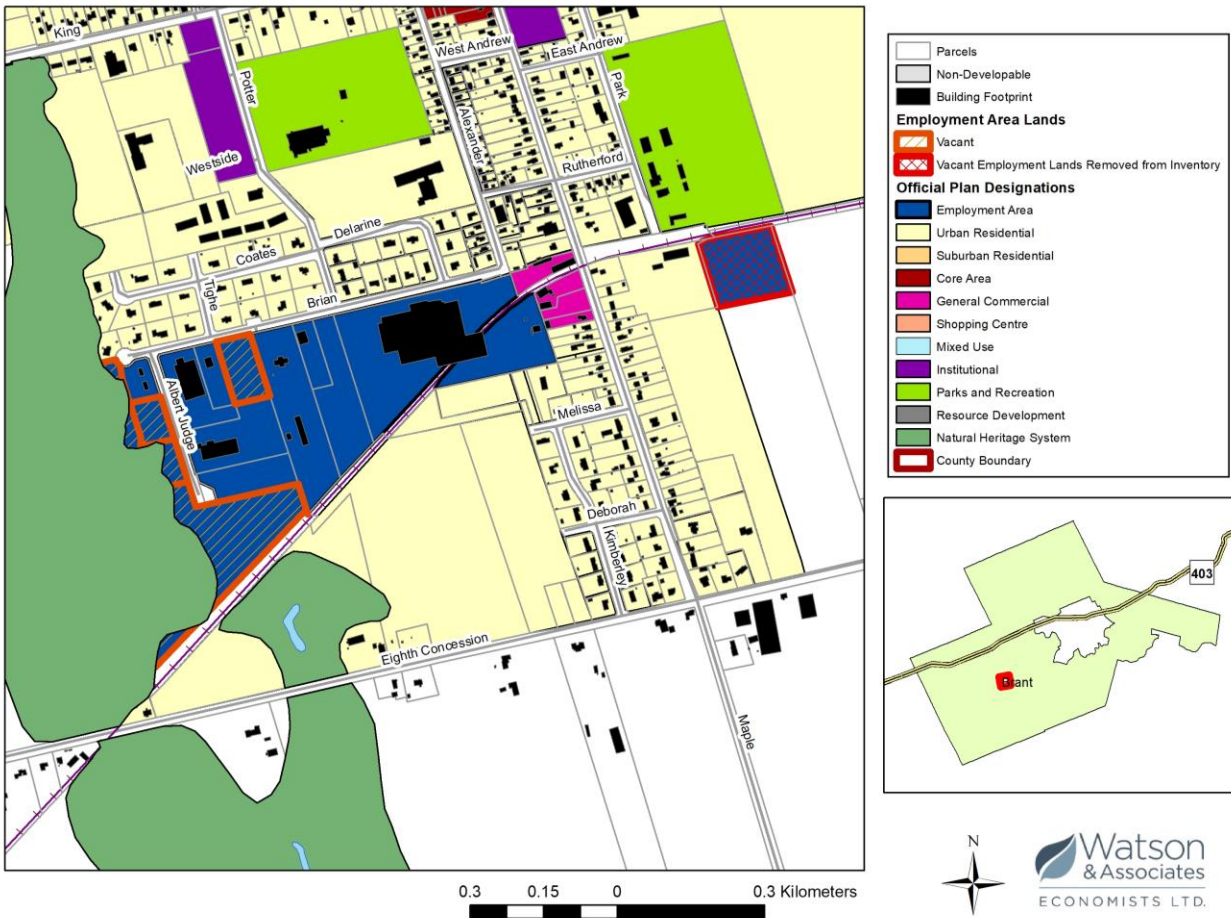
Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

Changes to supply since the County of Brant M.C.R. Draft Report, July 2021:

- No changes.



Figure H-6
Burford Employment Area



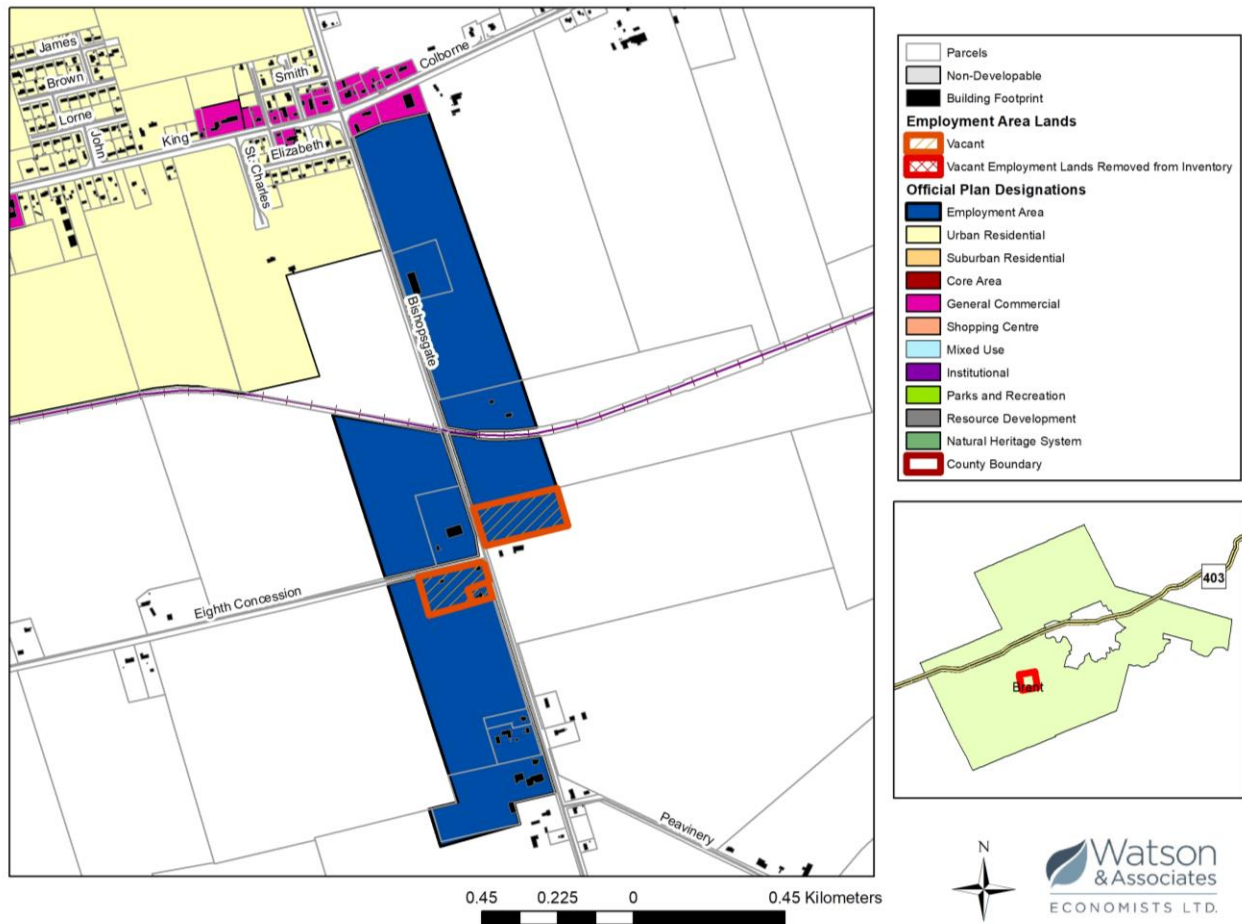
Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

Changes to supply since the County of Brant M.C.R. Draft Report, July 2021:

- No changes.



Figure H-7
Bishopsgate Employment Area



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).

Changes to supply since the County of Brant M.C.R. Draft Report, July 2021:

- No changes.



Figure H-17
Primary Settlement Areas
Employment Areas Land Supply as of January 2023

Primary Settlement Areas	Changes to Land Supply Since Brant M.C.R. Draft Report, ha	Updated Employment Land Supply as of January 2023, ha	Adjusted for Land Vacancy Adjustment, ha	Annual Demand, ha	Years of Supply Remaining
Paris	29	231	139	11	13
St. George	0	89	58	2	29
Burford	0	10	10	0.3	32
Total	29	330	207	13	-

Source: Watson & Associates Economists Ltd., 2023 based on updated Employment Area land supply provided by the County of Brant.



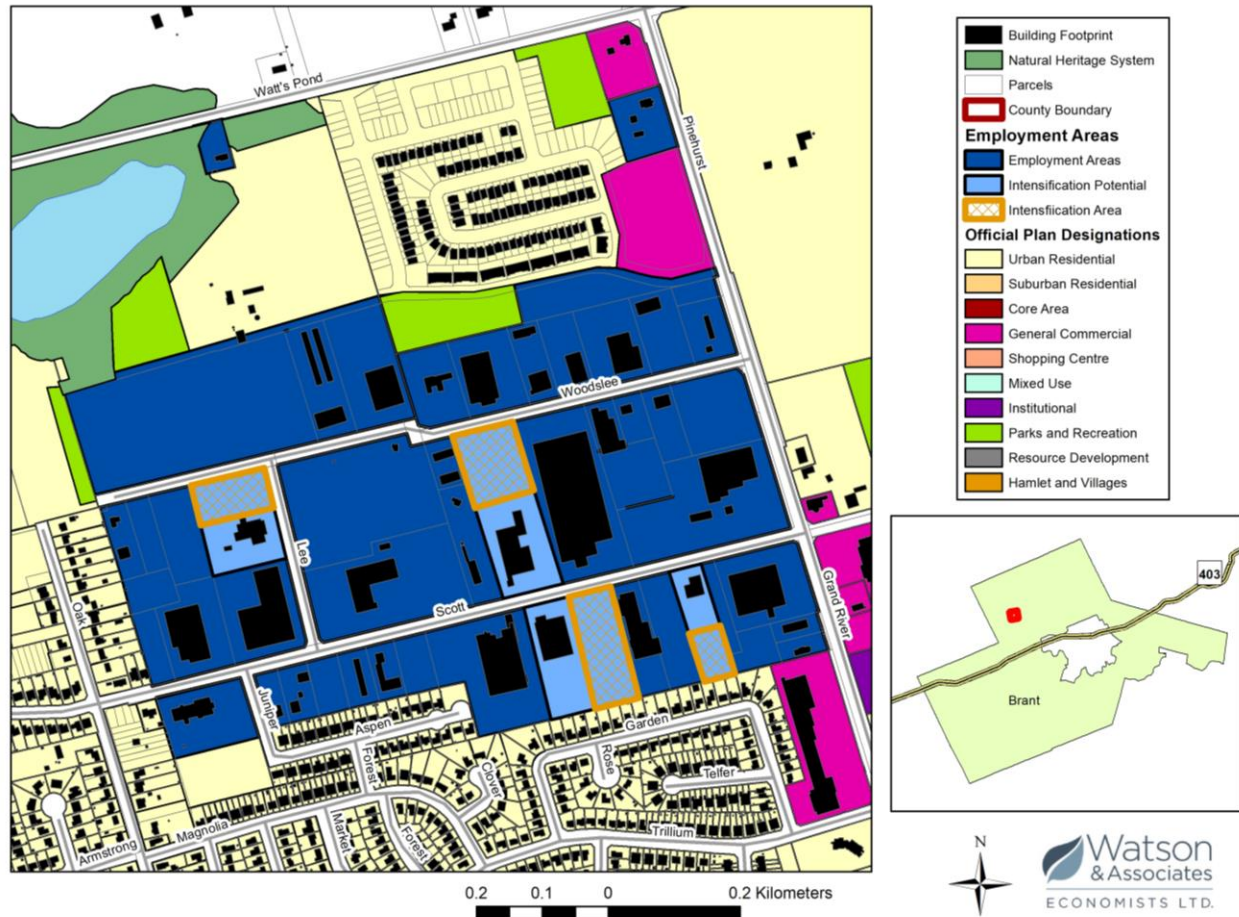
Appendix I

Employment Area Intensification Opportunities in Paris

Note: The following appendix is derived from the County of Brant M.C.R. Draft Report, July 2021, and no changes have been made.



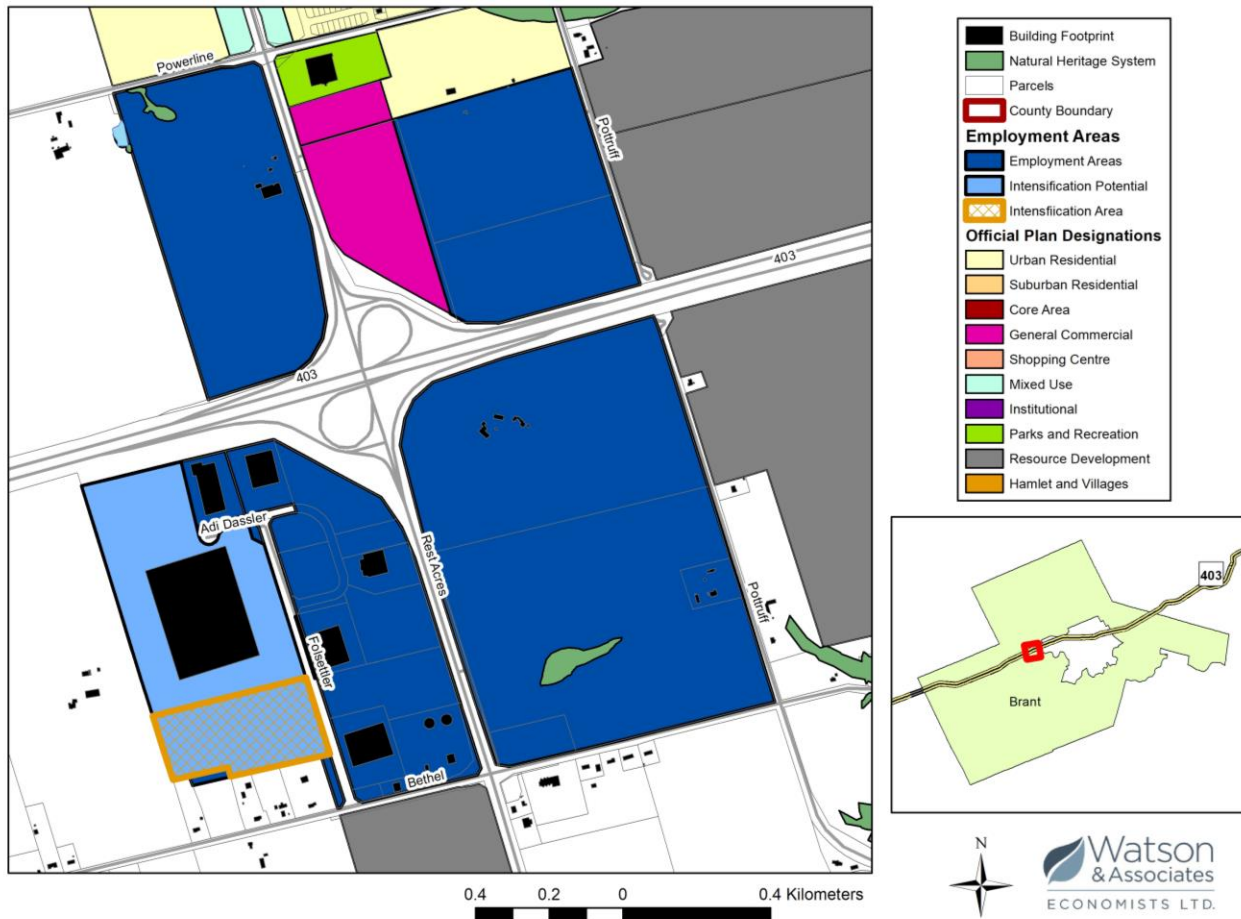
Appendix I-1: Employment Area Intensification Opportunities – North Paris Employment Area



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



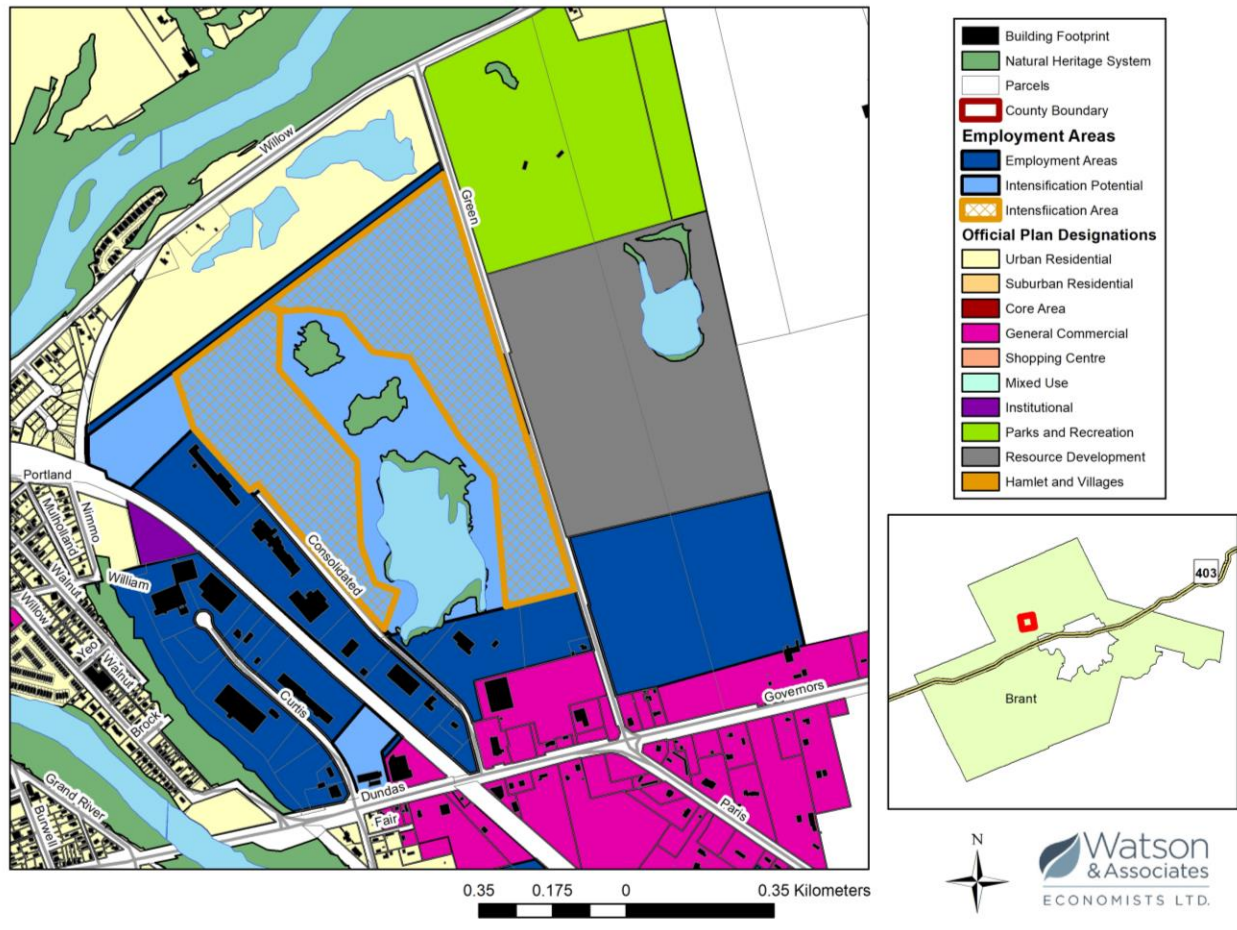
Appendix I-2: Employment Area Intensification Opportunities – Paris Highway 403 Business Park



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



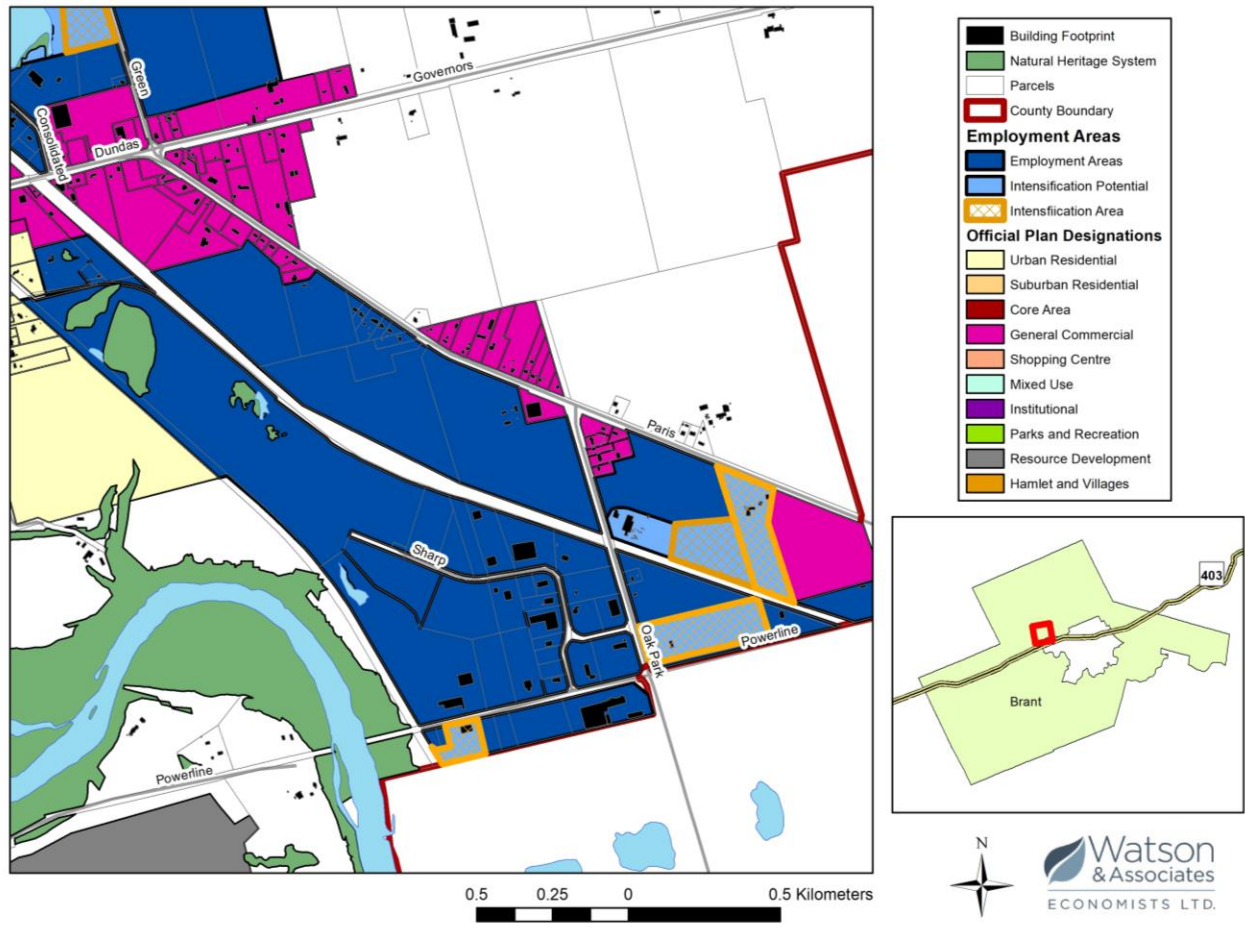
Appendix I-3: Employment Area Intensification Opportunities – Southeast Employment Area, North Portion



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix I-4: Employment Area Intensification Opportunities – Southeast Employment Area, South Portion



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix J

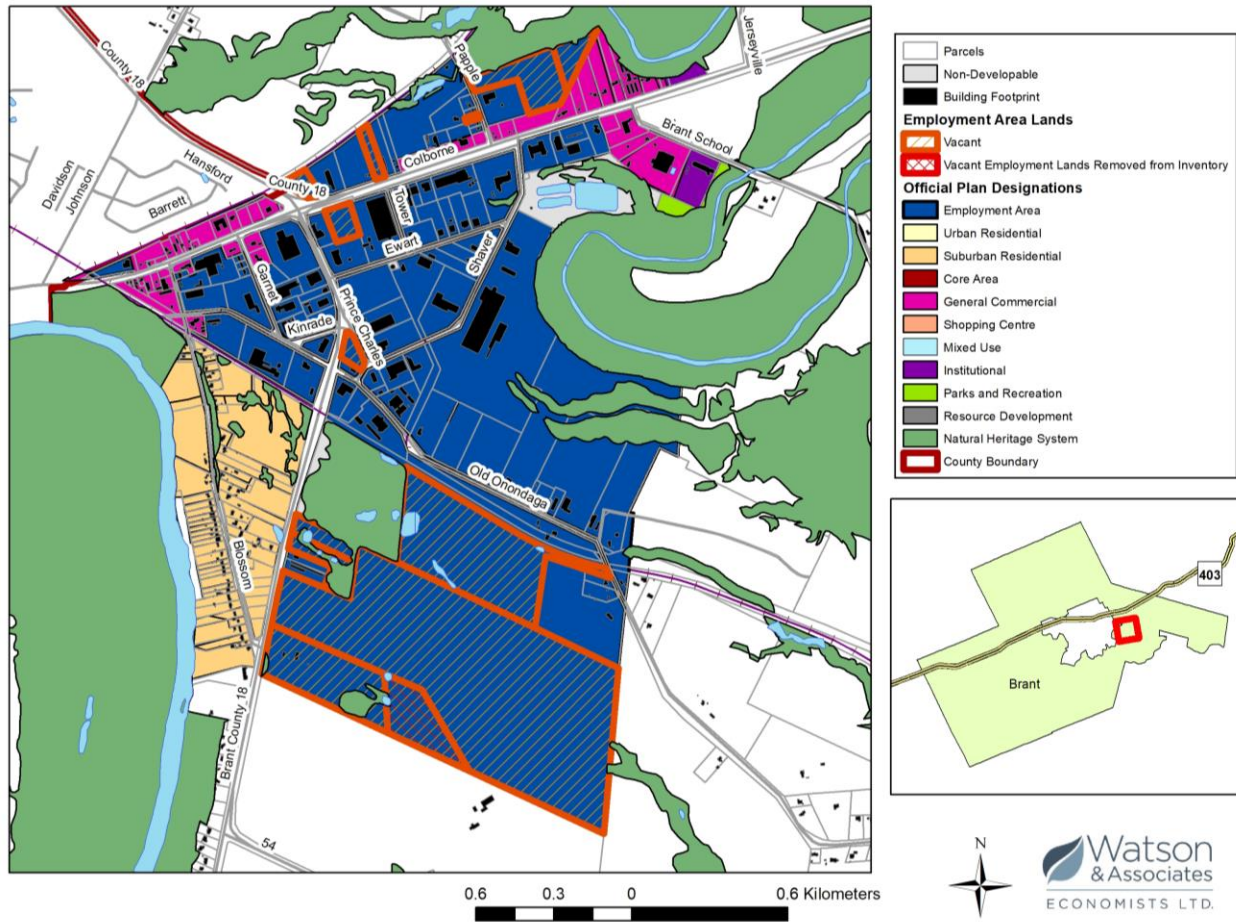
Rural Employment Area Developed and Vacant Land Supply

Note: The following appendix is derived from the County of Brant M.C.R. Draft Report, July 2021. The Burford Employment Areas have been excluded from the Rural Employment Area land supply (refer to Appendix H for Burford Employment Area land supply mapping). No other changes have been made.



Appendix J: Rural Employment Area Developed and Vacant Land Supply

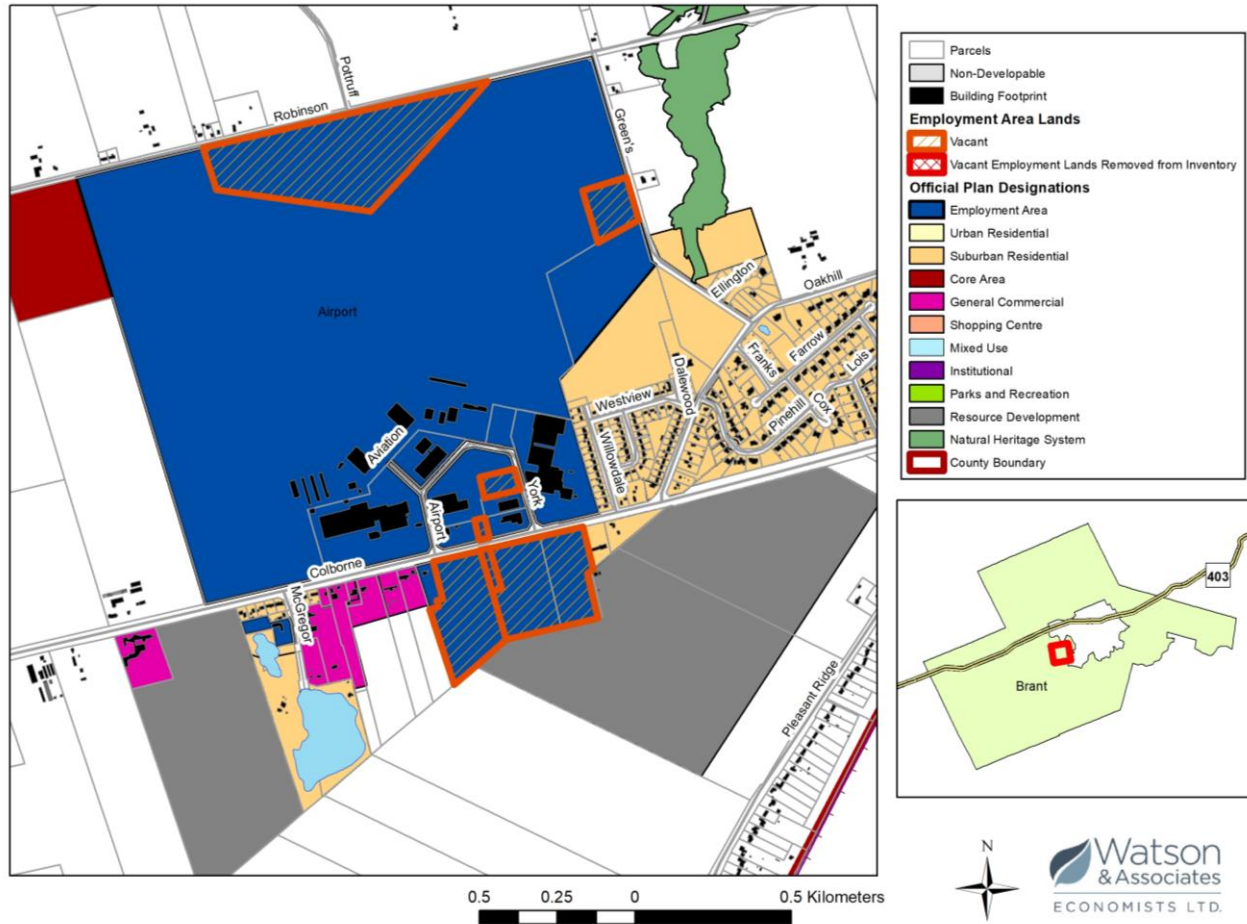
Figure J-1
Cainsville Employment Area



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



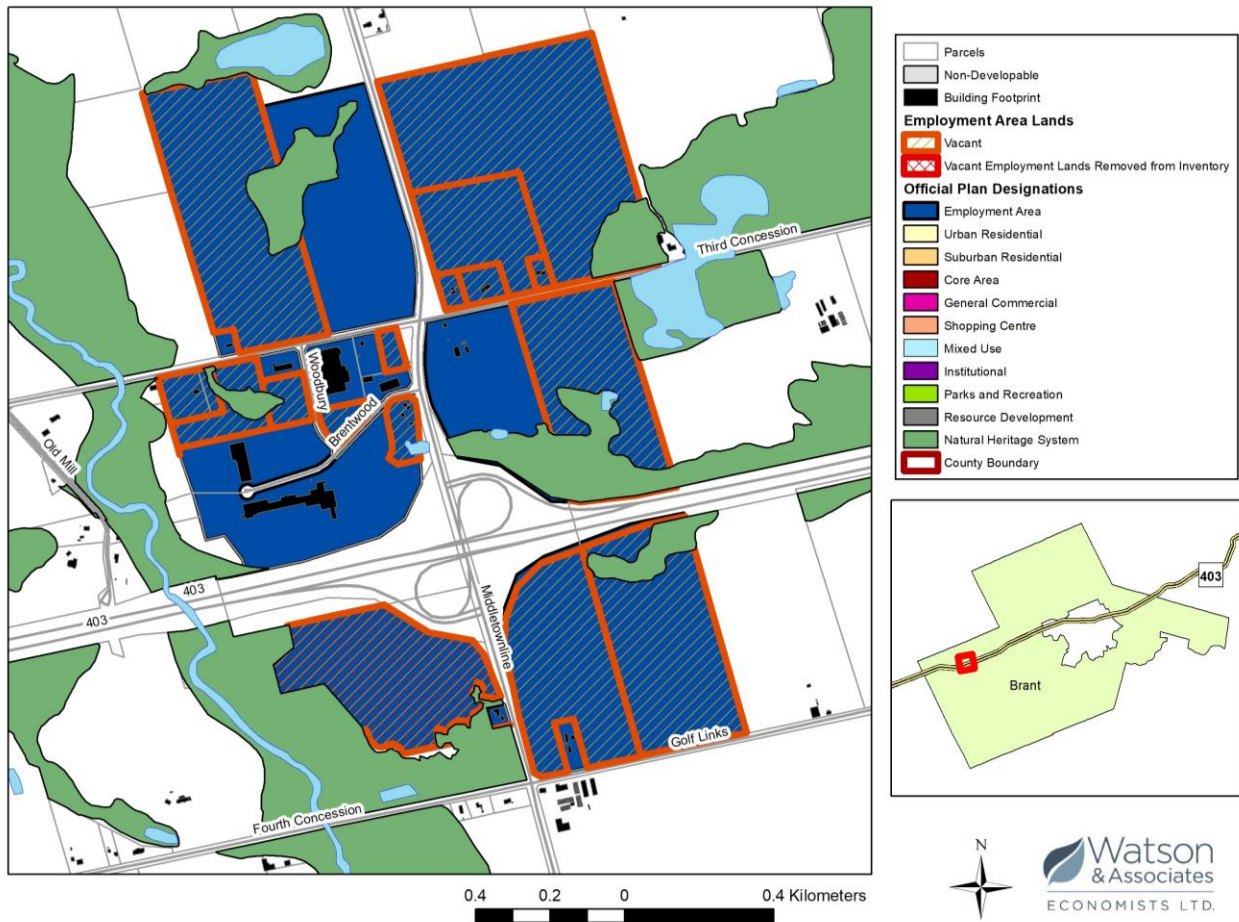
Figure J-2
Airport Employment Area



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



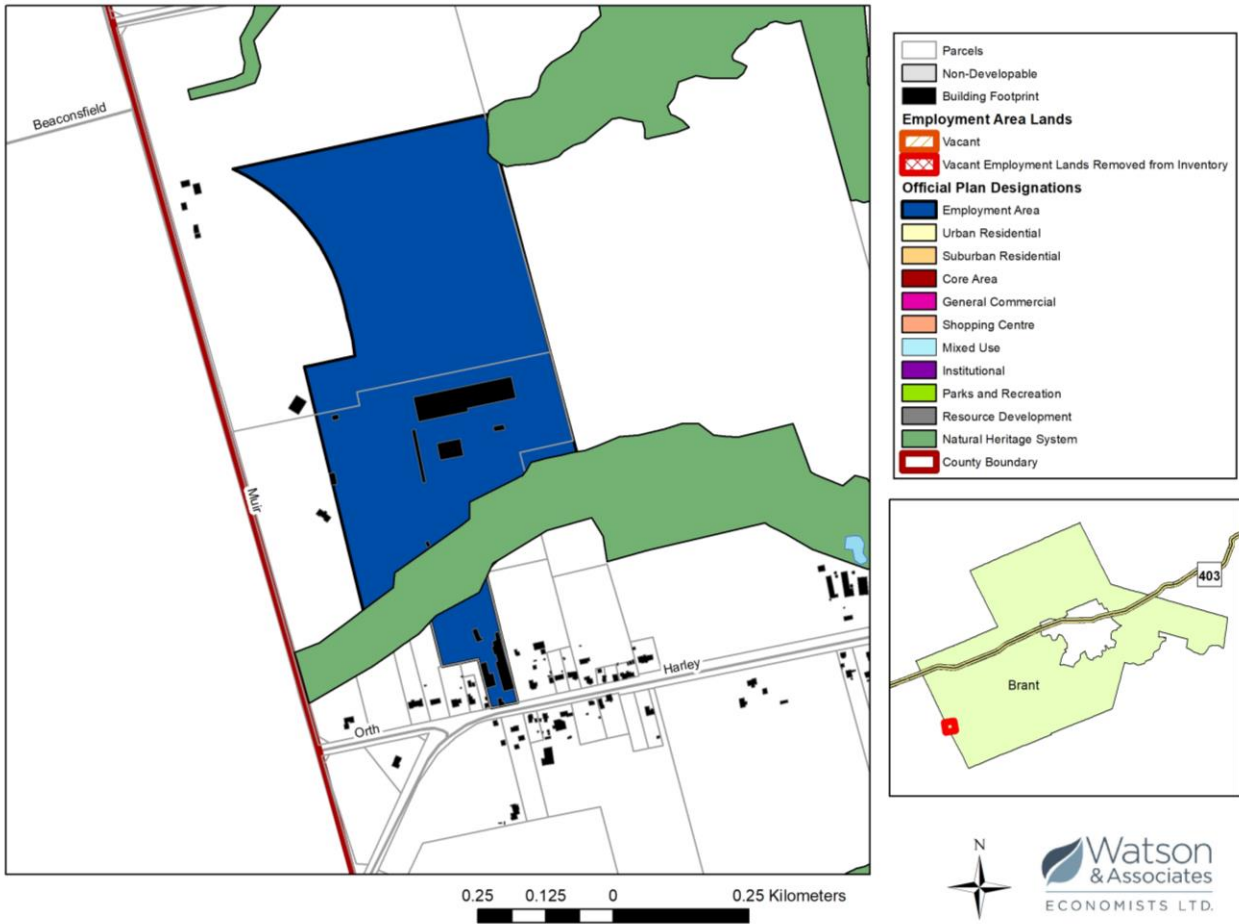
Figure J-3
Highway 25 and Highway 403 Employment Area



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Figure J-4
New Durham Employment Area



Note: The Official Plan designations displayed are based on the current County of Brant Official Plan (2012).



Appendix K

Employment Area Conversion Evaluations

Note: The following appendix is derived from the County of Brant M.C.R. Draft Report, July 2021. It should be noted that as part of the Addendum, the site at 67 Woodslee Avenue has been identified for conversion to Non-Employment Use based on Council Direction.



Appendix K: 67 Woodslee Avenue, Paris North Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
5	The site is located outside or on the fringe of an assembly of Employment Areas.	✗
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	✗
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	✓
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	✗
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	✗
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	✗
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

#	
✓	4
✗	5
Suggest <u>not</u> to convert.	



Appendix K-2: 326 Grand River St. N., Paris North Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
5	The site is located outside or on the fringe of an assembly of Employment Areas.	✗
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	✗
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	✗
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	✗
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	✗
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	✗
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

#	
✓	3
✗	6
Suggest <u>not</u> to convert.	



Appendix K-3: Sharp Road, Paris Southeast Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
5	The site is located outside or on the fringe of an assembly of Employment Areas.	x
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	x
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	x
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	x
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	x
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	x
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	Yes

#	
✓	1
x	8
Suggest <u>not</u> to convert.	



Appendix K-4: Site 4a and 4b: Cainsville

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
5	The site is located outside or on the fringe of an assembly of Employment Areas.	x
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	x
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	x
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	x
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	x
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	x
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	x
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

	#
✓	0
x	9
Suggest <u>not</u> to convert.	



Appendix L

S.A.B.E. Evaluation Matrix

Note: The following appendix has been derived from the County of Brant M.C.R. Draft Report, July 2021, and no changes have been made.



Appendix L: Site 1

Site 1: Highway 403 and Pottruff Road Rd., NE

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible			P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?			10% to 25%		APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site	APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?		Separated by Arterial			Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?			Moderate Opportunity		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 2

Site 2: 211 Pottruff Road Rd., NE

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact	APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?			Feasible	P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact	APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)			Modest Impact	APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?			10% to 25%	APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered	P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?		Separated by Arterial			Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)		Minimal Impact			Local Criteria
	Does it offer a good transition from new to existing development?			Moderate Opportunity		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 3

Site 3: 169 Pottruff Road & 21 Bethel Road

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?			Adjacent to Site		APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?				Low Opportunity	Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 4

Site 4: 822 Rest Acres Road

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?				Low Feasibility	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS				APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site	APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?		Adjacent to site buffered			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)				High Impact	Local Criteria
	Does it offer a good transition from new to existing development?				Low Opportunity	APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 5

Site 5: Bethel Road Lands (5 sites)

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?			Adjacent to Site		APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?				Low Opportunity	Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 6

Site 6: 143 Bethel Rd.

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?		Highly Feasible			APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible			P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS				APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No				APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No				P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?		Actively used for agriculture, Class 4 to 7		P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)		Low level of agriculture activity (mixed: crops/ & or livestock)		APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 7

Site 7: Bethel Rd./Cleaver Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible		P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%		APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?		Actively used for agriculture, Class 4 to 7		P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)		Low level of agriculture activity (mixed: crops/ & or livestock)		APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 8

Site 8: 1034 Powerline Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?		Highly Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available			P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)			Modest Impact		Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 9

Site 9: 989 Powerline

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?	Available				APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact			APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)	Negligible Impact				APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS				APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No				APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No				P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Municipal Comprehensive Review

County of Brant

Final Report

Date: July 26, 2021

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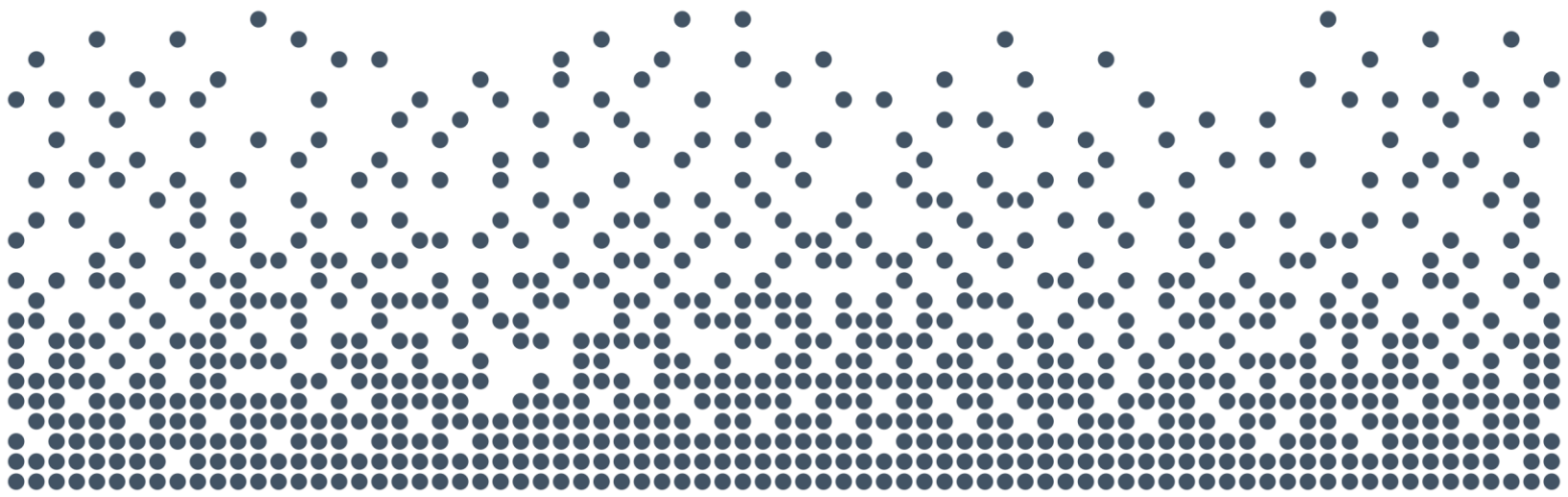
List of Acronyms and Abbreviations

A.I.A.	Agriculture Impact Assessment
A.P.T.G.	A Place to Grow
A.R.U.	Additional Residential Unit
B.U.A.	Built-up Area
D.G.A.	Designated Greenfield Area
E.L.E.	Employment Lands Employment
G.D.P.	Gross Domestic Product
G.F.A.	Gross Floor Area
G.G.H.	Greater Golden Horseshoe
G.L.A.	Gross Leasable Area
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.N.A.	Land Needs Assessment
M.D.S.	Minimum Distance Separation
M.M.A.H.	Ministry of Municipal Affairs and Housing
M.C.R.	Municipal Comprehensive Review
N.A.I.C.S.	North American Classification System



List of Acronyms and Abbreviations (Cont'd)

N.F.P.O.W.	No Fixed Place of Work
O.P.	Official Plan
P.P.S.	Provincial Policy Statement
P.P.U.	Persons Per Unit
P.R.E.	Population-Related Employment
S.A.B.E.	Settlement Area Boundary Expansion



Executive Summary



Executive Summary

The O.P. is a long-range document that is designed to manage planned change and the physical development of the County over a long-term planning horizon. The County of Brant is currently preparing to revise its O.P. to describe the type of growth the community wants and where that growth should occur over the next 30 years. The process of preparing revisions to the County's O.P. represents an M.C.R., in accordance with section 26 of the Planning Act. This process is required to bring the County's O.P. into conformity with the Growth Plan, 2019 (as amended), as well as to reflect current provincial policy direction and the County's strategic initiatives. Integral to the County's O.P. is a comprehensive review of how new development will be planned, phased, and accommodated to the year 2051. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development.

Key components of this M.C.R. report include:

- A review of the Urban and Rural Systems, including settlement hierarchy;
- Long-term population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by urban and rural area, as well as by urban settlement area;
- An analysis of urban Community Area land needs (to accommodate residential and population-related employment);
- An analysis of urban Employment Area land needs (to accommodate primarily export-based or industrial-type employment);
- An analysis of Employment Area conversion requests;
- A review of Settlement Area Boundary (S.A.B.E.) requests base; and
- Conclusions and recommendations related to the County's urban land needs, Employment Area Conversions and S.A.B.E., as well identifying next steps.

County of Brant Urban and Rural System

The County of Brant includes a blend of urban and rural communities. The Rural System includes lands that are protected from large-scale urban development. A key objective of the Rural System is to protect agriculture land, resources and the natural environment, while encouraging economic and cultural activities that support the health and prosperity of rural communities. A key objective of the Urban System is to direct



growth where there is planned and existing infrastructure in a manner that supports principles of complete communities. Complete communities include a diverse mix of land uses that provide opportunities to live, shop and work in the same community.

The Growth Plan, 2019 requires the majority of the forecast growth to be allocated to the areas with servicing (water/wastewater), i.e., Primary Settlement Areas (Growth Centres)¹ in the County's new Draft O.P. While Secondary Settlement Areas (new County Draft O.P.)² have only partial servicing and limited municipal servicing (some cases servicing studies are pending) are classified as part of the Urban System in the County's new O.P., recognizing the development character of the settlement area. For the purposes of the M.C.R. Report, Secondary Settlement Areas are grouped within the Rural System in accordance with the provincial L.N.A. The Secondary Settlement Areas are anticipated to accommodate some growth based on existing servicing capacity and subject to further servicing review. In terms of a hierarchy these areas are considered a higher priority for growth than the villages and hamlets³ and remaining rural area. The urban land needs assessment is based on fully-serviced lands within the Primary Settlement Area and includes Paris and St. George.

Paris and St. George, settlement areas are proposed as Primary Settlement Areas (Growth Centres) in accordance with the provincial Urban Settlement Area policies. These settlement areas provide full services, a delineated B.U.A., a concentration of public facilities and a range of land-uses. These Primary Settlement Areas (Growth Centres) are to comprise the only settlements within the Urban System.

Figure ES-1 provides an illustration of the proposed Urban System structure.

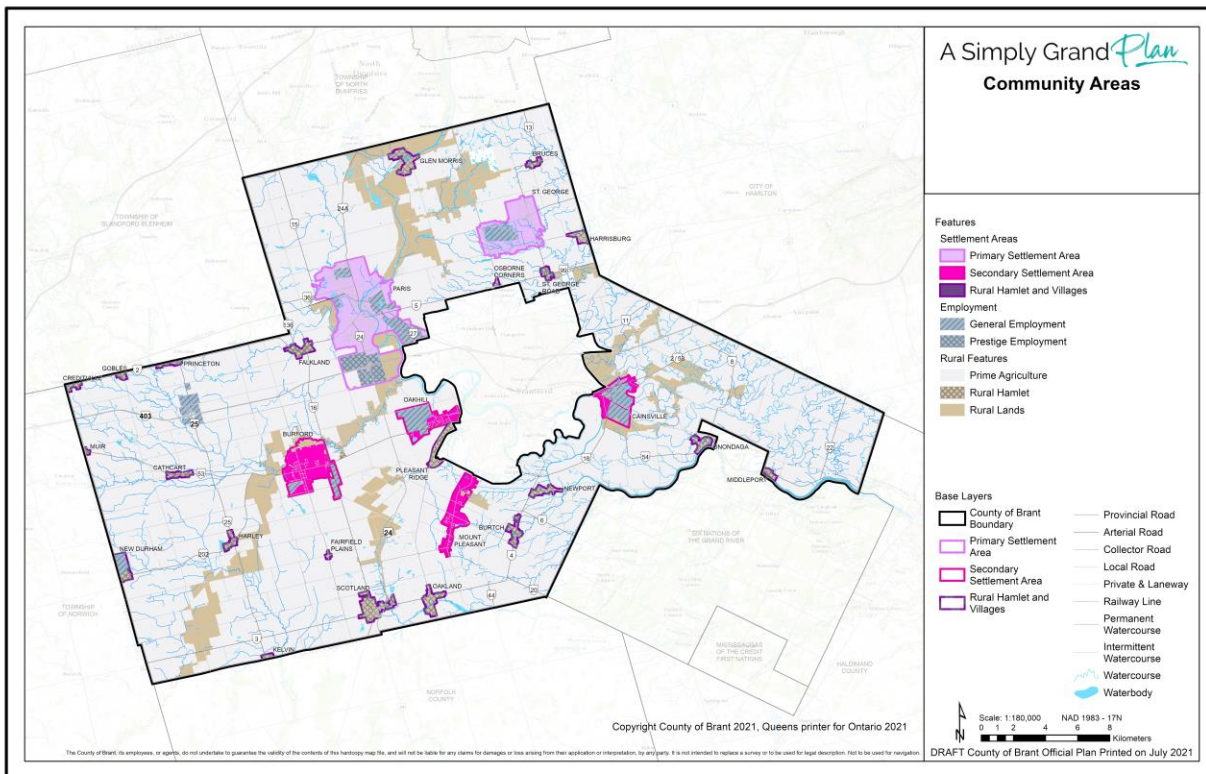
¹ Primary Settlement Areas include Paris and St. George as identified in Figure ES-1 in light purple outline.

² Secondary Settlement Areas include Cainsville, Burford, Mount Pleasant and Oakhill, as identified in Figure ES-1 in dark pink outline.

³ Villages and Hamlets include the several small settlement areas across the County. Examples of some of the village and hamlets include Glen Morris, Scotland, Oakland, New Durham and Harley, as identified in Figure ES-1 in dark purple outline.



Figure ES-1
County of Brant
Proposed Urban and Rural System



Source: County of Brant, Draft New O.P.

County of Brant Population Growth Outlook to 2051

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 economy within the County and the surrounding region – which in this case is largely represented by the G.G.H. The G.G.H. represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents a portion of the commuter-shed for the County of Brant. Potential employment opportunities within the County and the surrounding commuter-shed represent the primary driver of net migration to this area.

The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of approximately 5.3 million people (153,000 annually), or 1.3% annually between 2016 and 2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase



from 4.6 million in 2016 to 7.0 million in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051.

The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The industrial and office commercial real estate markets within the G.G.H. 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 G.G.H. is highly attractive on an international level to new businesses and investors. The G.G.H. 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 the G.G.H., largely driven by international and inter-provincial net migration to this region.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. As illustrated in Figure ES-2, due to its geographic location within the western region of the G.G.H. Outer Ring, the County of Brant is forecast to experience significant outward growth pressure over the next several decades largely from the western and northern Greater Toronto and Hamilton Area (G.T.H.A.) upper-tier municipalities, which have historically been amongst the fastest growing municipalities in Ontario in recent decades.

The County's "small town" urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. For the County of Brant, the coronavirus disease (COVID-19) pandemic has acted as a near-term driver of housing demand, 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 the County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in the County of Brant over the long term.



Over the past two decades, the County has experienced steady employment growth across a broad range of sectors including manufacturing, construction, retail, transportation and warehousing, agriculture, and tourism. The County's employment base is also highly concentrated in the creative class economy, including people engaged in arts and culture, such as artists, actors, performers, writers and designers. The economic base is also highly oriented towards small businesses and home-based occupations. To varying degrees, the County's established employment sectors are all anticipated to experience employment growth consistent with the relatively strong long-term economic outlook for the broader economy.

As the employment base continues to grow within the County and the surrounding commuter-shed, the economy is also anticipated to diversify, generating a range of new live/work and commuting opportunities that increasingly focus on emerging knowledge-based employment sectors related to professional, technical and scientific services, other business services, health care and education and information technology.

As the local employment base and economy within the surrounding commuter-shed continue to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population growth across the County. Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated in neighbouring municipalities within the G.G.H. Raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy is recommended as a key long-term economic development strategy for the County.



Figure ES-2
G.G.H.
County of Brant within the Context of the G.G.H.

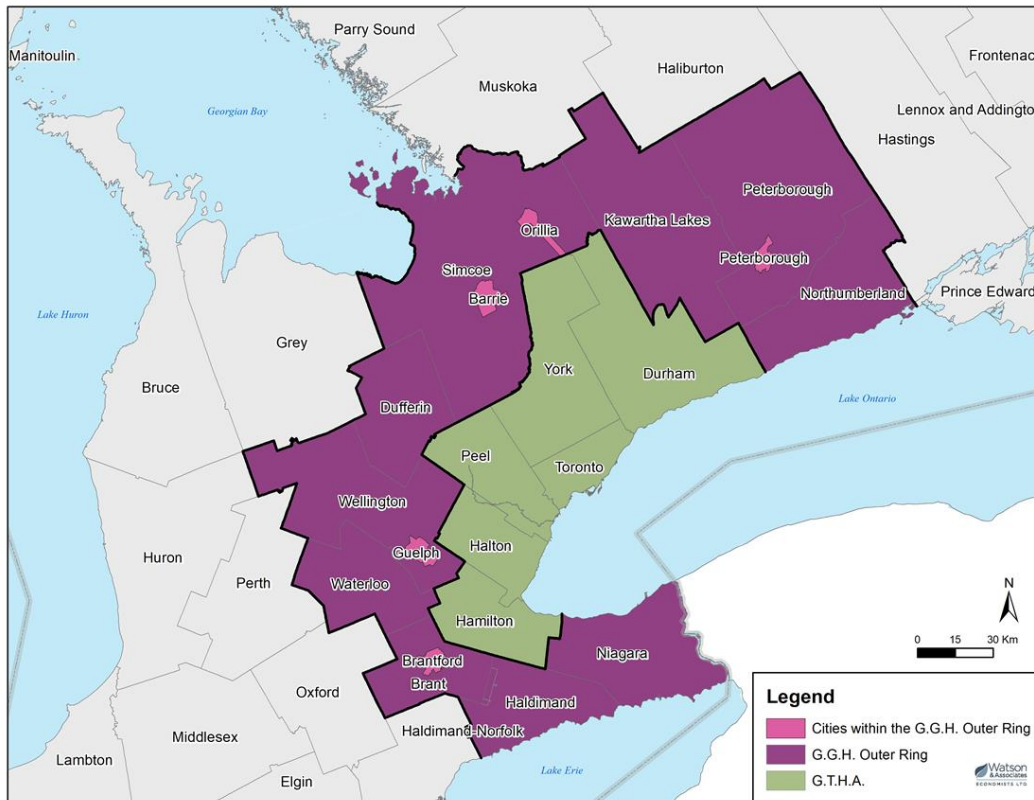


Figure ES-3 summarizes the County of Brant’s total population growth forecast over the 2016 to 2051 forecast period relative to historical population between 2001 and 2016. By 2051, the County’s total population base is forecast to grow to approximately 59,000. This represents an increase of approximately 21,200 persons between 2016 and 2051, or an average annual population growth rate of 1.3% during this time period. Based on the review of the County’s long-term growth outlook provided in this report, the 2051 population and employment forecast, as set out in Schedule 3 of the Growth Plan, 2019, is the recommended long-term growth scenario for the County of Brant. The Schedule 3 Growth Plan, 2019 forecast for the County of Brant:

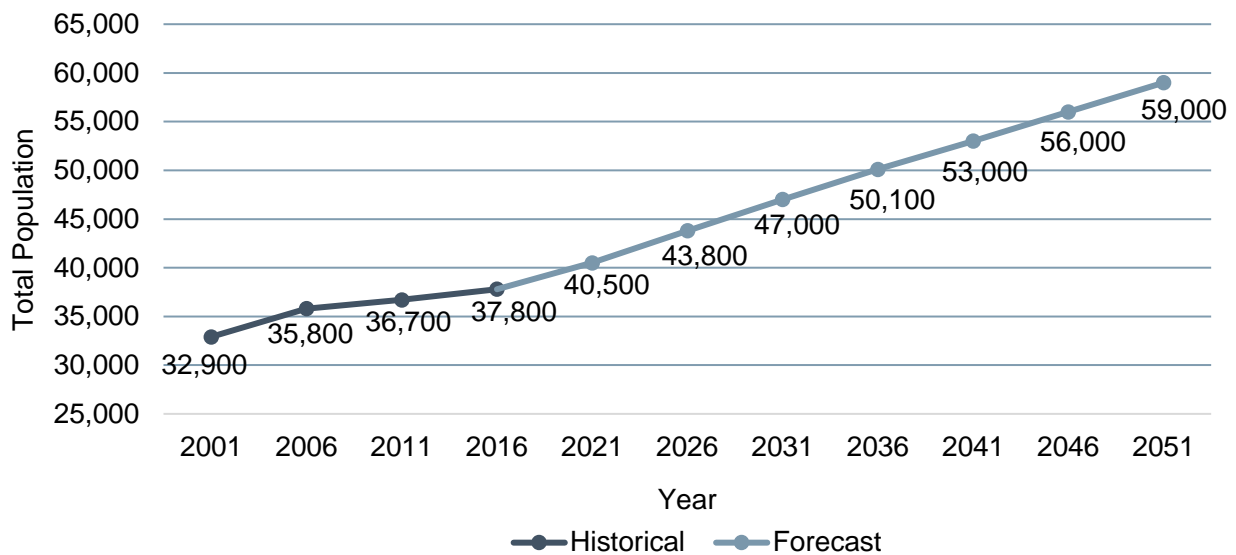
- Represents a reasonable increase in long-term population and employment growth relative to historical trends;
- Accurately identifies the anticipated influence of identified regional and local growth drivers on future development trends across the County; and



- Represents a reasonable increase in the share of total population and employment in the County of Brant relative to the G.G.H. Outer Ring as a whole.

As such, a higher long-term population forecast for the County of Brant is not supported for the purposes of long-term growth management and urban land needs analysis.

Figure ES-3
County of Brant
Population Growth Forecast to 2051



Note: Population includes net Census undercount.

Source: Historical data derived from from Statistics Canada Census and Annual Demographic Estimates: Subprovincial Areas, 2001 to 2016. Forecast by Watson & Associates Economists Ltd., 2020.

To accommodate the long-term population forecast, the County will require an additional 7,500 new households to be constructed over the 2021 to 2051 planning horizon, or just over 250 new households annually. As a comparison, this is approximately 66% higher than the average level of 150 new housing unit growth which was achieved from 2006 to 2016. It is anticipated that a large component of housing growth will include low-density housing; however, increasing demand is also anticipated for medium-density and high-density housing forms to provide greater choice in housing options by type and tenure for a broad range of residents by age and income.

Addressing the interconnection between the County's competitive economic position and its longer-term housing needs by market segment is critical in realizing the County's



future forecast population and employment growth potential, as well as the County's ultimate goals related to prosperity, opportunity, and livability. This approach recognizes that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. To ensure that economic growth is not constrained by future labour shortages, effort will be required by County of Brant to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

It is important to recognize that while the County's population base is growing it also is getting older. Between 2016 and 2051, the 75+ age group (older seniors) is forecast to represent the fastest growing population age group with an average annual population growth rate of 3.7%. With an aging population the County will be more reliant on net migration as a source of population as opposed to natural increase. With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand medium and high-density forms including seniors' housing and affordable housing options. The County of Brant is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.

County of Brant Population Growth Allocations, 2016 to 2051

Over the forecast horizon it is anticipated that the County's two Primary Settlement Areas (Growth Centres) as well its Secondary Settlement Areas, hamlets and remaining rural areas will all continue to experience housing growth. The Primary Settlement (Growth Centre) of Paris, located in the northern portion of the County just outside the City of Brantford is anticipated to accommodate a large portion of County's population growth (60%) over the long-term planning horizon. The Urban Settlement Area of St. George is anticipated to accommodate approximately one fifth of the County's population growth (20%), while the Rural System is anticipated to accommodate one fifth of the County's population growth (20%). A lack of municipal water servicing is expected to limit future residential development within the County's Secondary Settlement Areas and Hamlet Areas.



Over the forecast horizon, it is anticipated that the County will become increasingly more urban. As of 2016, approximately 42% of the County's population is within the Primary Settlement Areas, while 58% of the County's population is within Secondary Settlement Areas, Hamlets and Villages and the remaining rural area. Looking forward, it is anticipated that by 2051, approximately 58% of the County's population based will be concentrated within the Primary Settlement Areas, which includes Paris and St. George. It is anticipated that the Primary Settlement Areas within the County will accommodate an additional 16,800 persons by 2051. As a comparison, this growth increment is greater than the estimated Urban System population base as of 2016 (2016 population within the Urban System is estimated at 16,000). It is anticipated that the County's Urban Settlement Areas will play an increasing role in broadening future housing options available within the County with respect to housing by structure type. Chapter 5 explores the urban land requirements to accommodate future urban growth within the existing settlement boundaries of the Urban Settlement Areas.

Residential Intensification Target

It is recommended that the County target a higher intensification rate of 20% of housing growth within the B.U.A. The B.U.A. in Paris, and to a lesser extent, St. George offers an opportunity to accommodate a wide range of housing options (low, medium and high density), as well as the active planning applications/approved developments suggest that the County can achieve at least 48 units annually in the B.U.A.

Community Area Land Needs Assessment

The County has a robust supply of potential housing development in the planning approvals process (i.e. development pipeline). The County supply of housing in the development pipeline is anticipated to accommodate a greater range of housing options compared to the existing D.G.A. base.

Based on the comprehensive analysis carried out herein, it has been determined that the County has surplus of Community Area land of approximately 395 gross ha to 2051. These surplus lands are not considered to be needed until the post-2051 period and will be subject on ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered interchangeable with the identified shortfall of Urban Employment Areas, which is identified in Chapter 6. It is recommended that the County's new Official Plan will



identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify Excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.

Employment Area Analysis and Urban Employment Area Land Needs

The long-term economic outlook for the County is very positive. As previously noted, as the local employment base and economy within the surrounding commuter-shed continues to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population and population-related employment growth across the County.

Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated within neighbouring municipalities within the G.G.H. Outer Ring. As such, raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy will continue to be a key long-term economic development objective for the County of Brant. Achieving the County-wide employment forecast and allocations by settlement area (Paris and St. George) will also require significant investment and effort on behalf of both the public and private sector to attract and accommodate new employers and facilitate the expansion of existing businesses across a broad range of established and emerging employment sectors.

As previously noted, the County's competitive economic position is highly tied to its ability to attract and accommodate a growing skilled and unskilled labour force pool. To ensure that economic growth is not constrained by future labour shortages, effort will be required by the County of Brant and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options.

The County of Brant has a surplus of approximately 49 ha of designated urban commercial land to accommodate the commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.



The County has a shortfall of designated Urban Employment Area lands of approximately 105 gross ha. The shortfall within Paris is approximately 110 ha, while a small surplus of 5 gross ha has been identified in St. George. The County should explore options to add additional Urban Employment Areas, including expanding the settlement area boundary in Paris to accommodate additional Employment Area lands in the Paris 403 Business Park.

Employment Area Conversion

Changes to a site designated in the County's O.P. as "Employment" to allow for uses not permitted in the designation, including residential, mixed use and specific commercial uses, is considered an Employment Area land conversion. The conversion of Employment Area lands generally occurs during the M.C.R. process as there is a need to understand the broader impacts of the conversion under the policy framework of the Growth Plan, 2019 and P.P.S., 2020 as well as local site-specific considerations. As part of this M.C.R., Employment Area conversion requests have been reviewed and evaluated.¹ Based on this review, a series of recommendations have been made with respect to six sites within Urban and Rural Employment Area where conversion requests have been submitted.

It is recommended that all sites requested for conversion remain as Employment Area. It is recommended to broaden the permissions for commercial uses (as part of the proposed Grand River St. N. corridor overlay) for 326 Grand River St. N. in the Paris North Employment Area. A conversion request site evaluation has been completed for each Employment Area and is provided in Appendix K.

Settlement Area Boundary Expansion

It is recommended that the County expand the Urban Settlement Area Boundary to accommodate the need for Urban Employment Area land. As discussed, approximately 105 ha of Employment Area land is required. The County received numerous requests for S.A.B.E. expansion, however only requests to accommodate additional Employment Area land was reviewed as part of the M.C.R.

Settlement Area Boundary Expansion (S.A.B.E.) requests adjacent to the Paris 403 Business Park were selected as the focus area for review since these sites are in

¹ Refer to Section 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.



proximity to an Employment Area with the greatest demand for Employment Area growth. The Paris 403 Business Park has been identified by the County of Brant as a potential Provincially Significant Employment Zone (P.S.E.Z.), an area identified for long-term protection related to job creation and economic development. A request for the P.S.E.Z. has been submitted to the Province for the creation of a P.S.E.Z. within the Paris 403 Business Park. The Paris 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

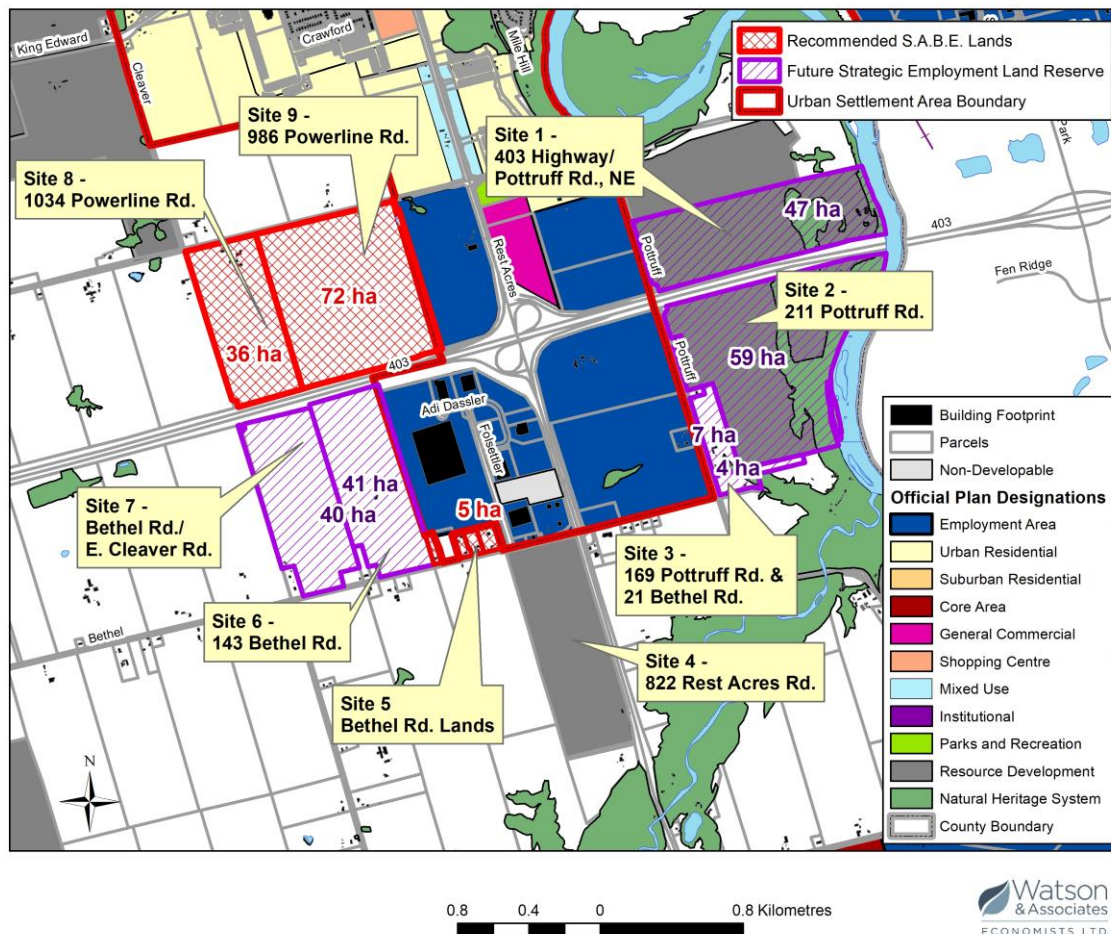
The S.A.B.E. requests in the Paris 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes which will be submitted and examined Province for review and approval:

- Municipal Servicing (water/wastewater and transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction impacts;
- Land-Use Planning; and
- Market Analysis.

As part of the S.A.B.E. analysis, the County identified lands for needed to accommodate demand between 2021 and 2051 (approximately 113 ha), as well as Future Strategic Employment Reserve lands (approximately 198 ha) which are identified for future S.A.B.E. if demand warrants over the 2051 horizon. Sites recommended for S.A.B.E. and as Future Strategic Employment Reserve are identified in Figure ES-4.



Figure ES-4
County of Brant
S.A.B.E. Candidate Sites and Sites Recommended for Expansion
403/Rest Acres Road Prestige Employment Corridor
Expansion to Paris Settlement Area Boundary

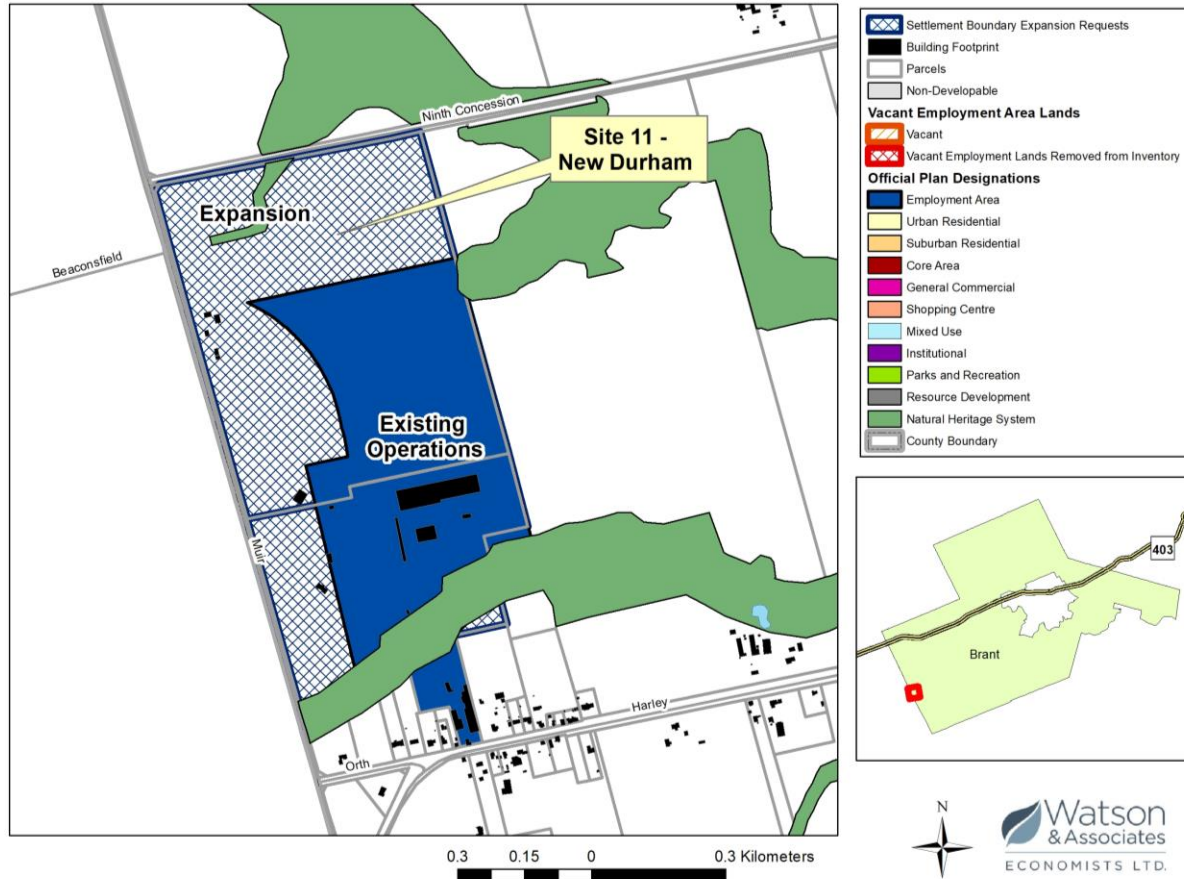


Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Expansions to Rural Employment Areas were also examined as part of this M.C.R. Figure ES-5 illustrates the location of a proposed S.A.B.E. totalling 23 ha to accommodate the potential expansion of an existing operation within the New Durham Rural Employment Area. Based on the Growth Plan, 2019 the request meets the S.A.B.E. requirements for Rural S.A.B.E. contingent on agricultural impact and M.D.S. requirements.



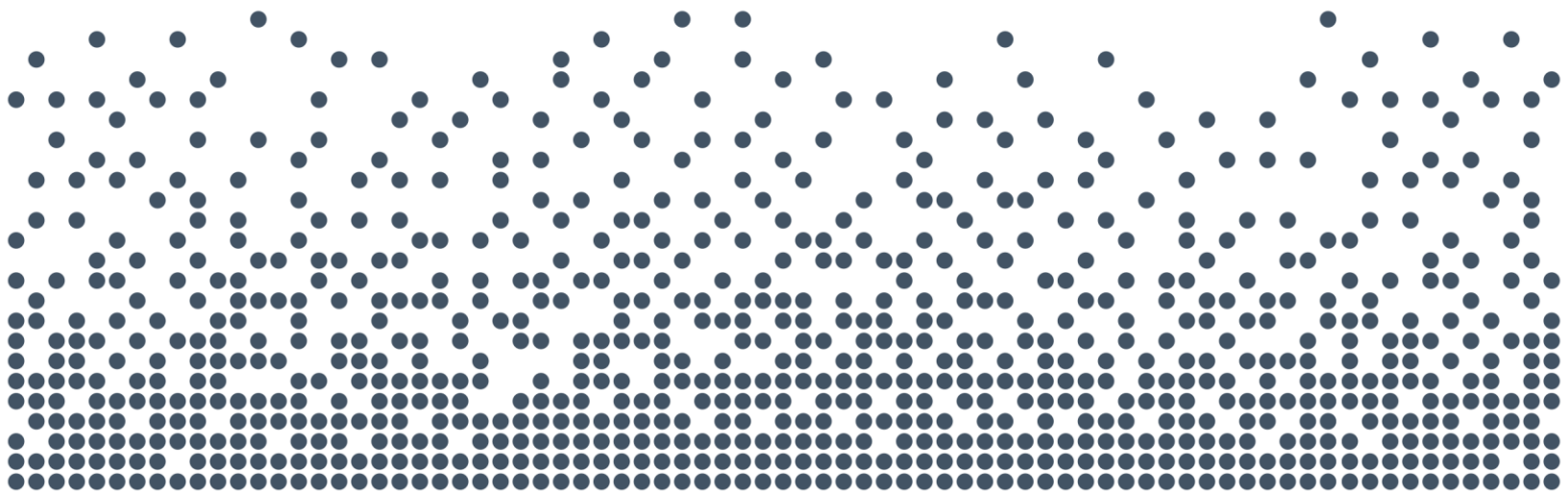
Figure ES-5
County of Brant
Recommended Rural Employment Area S.A.B.E.
New Durham Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Conclusions and Next Steps

A preliminary policy directions report has been prepared and is informed based on the findings of this M.C.R. report, as well as consultation with the public and council. The preliminary policy direction report was completed in tandem with this M.C.R. report. As key technical findings and milestones of the M.C.R. were presented to council and the public over the past year. This M.C.R. Report primarily includes information to support the Growth Management policy theme of the County's new O.P. These preliminary directions aim to inform and develop policies and procedures for the County of Brant to the year 2051 as based on seven strategic directions. The County's new O.P. has been completed in draft form for public comment.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

The County of Brant retained Watson & Associates Economists Ltd. (Watson) in early 2019 to prepare the growth management technical requirements of its Municipal Comprehensive Review (M.C.R.), and to provide the County with strategic policy recommendations to support the development of updated policies to the County's Official Plan (O.P.). The process of preparing an update to the County's O.P. represents an M.C.R. in accordance with section 26 of the *Planning Act*, R.S.O. 1990, c. P.13.

The M.C.R. technical reporting has been organized into one report which addresses the growth forecasts, growth allocations, land needs assessment and policy considerations.

Key components of this report include:

- A review of the existing policy content and community structure;
- Long-term population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by Urban Settlement Area and Rural System;
- Community Area land needs assessment including a review of designated residential and non-residential lands;
- Employment analysis and Employment Area land needs assessment;
- Employment Area conversion review;
- Settlement Area Boundary Expansion (S.A.B.E.) assessment; and
- Planning policy recommendations.

1.2 What is a Municipal Comprehensive Review?

An M.C.R. 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. An M.C.R. examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon. For municipalities located within the Greater Golden Horseshoe (G.G.H.), the long-term planning horizon is the year 2051.



The Province has defined a process for bringing an O.P. up to date with key parts of the Growth Plan, 2019¹ termed an M.C.R, which means:

“A new official plan, or an official plan amendment, initiated by an upper- or single-tier municipality under section 26 of the *Planning Act* that comprehensively applies the policies and schedules of this Plan.”

This process is specific to municipalities within the G.G.H. and is associated with its own deadline of July 1, 2022. The Growth Plan, 2019 and related guidelines set out how to complete an M.C.R.

Major components of an M.C.R. include:

- Review and refinement of the population, housing and employment forecasts;
- Review of intensification and density targets;
- Completion of an urban land needs assessment which determines if and how much new land will be needed to accommodate growth; and
- A review of O.P. policies and designations, including a range of themes, such as:
 - Building Healthy and Complete Communities;
 - Protecting What We Value;
 - How We Green;
 - Planning for Infrastructure;
 - Economic Development and Prosperity; and
 - Transportation and Mobility.

The results of the M.C.R. will assist staff in preparing amendments to the policies and maps in the County’s O.P. for consideration by Municipal Council. By completing the M.C.R., County staff will align the O.P. policies with the Growth Plan, 2019.

¹ A Place to Growth: Growth plan for the Greater Golden Horseshoe, 2019.



Chapter 2

Policy Context and Urban Structure



2. Policy Context and Community Structure

2.1 Policy Context

2.1.1 Provincial Policy Context

2.1.1.1 Provincial Policy Statement, 2020

The Provincial Policy Statement, 2020 (P.P.S., 2020) provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions “shall be consistent with” the P.P.S., 2020 (*Planning Act*, R.S.O. 1990, c. P. 13 s. 3).

The P.P.S., 2020 came into effect on May 1, 2020.¹ Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land-use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019) and the on-going updates to the Growth Plan. Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and to reduce barriers and costs to the land-use planning system in order to provide greater predictability.

A significant change of the P.P.S., 2020 with regard to housing policy is the provision of a housing options approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (Policy 1.4.3). Providing for housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

“A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts,

¹ Provincial Policy Statement, 2020 - Under the *Planning Act*. Ontario.



affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.”

Throughout the P.P.S., 2020, there is strong encouragement to consider the market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms that they have not historically had considerable success in implementing. As such, when discussing the outlook for the real estate market, it is important to discuss both existing conditions as well as the driving factors that are anticipated to encourage and disrupt housing market demand by structure type and built form. Furthermore, while market demand is important when considering long-range land-use planning, this demand must be broadly considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and diversifying an economic base and supporting job creation.

Notable policies related to planning for Employment Areas in the updated P.P.S., 2020 include requiring municipalities to have enough urban land supply to meet projected needs for a planning horizon of 25 years, and include Employment Areas as areas that could be planned for beyond this horizon, provided they are not designated beyond the planning horizon.

The P.P.S., 2020 recognizes the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. It provides details on how municipalities should plan for employment. The P.P.S., 2020 policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The policy further outlines that, during an O.P. review or update, planning authorities assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2).



2.1.1.2 *A Place to Growth, Growth Plan for the Greater Golden Horseshoe, 2019*

The Growth Plan, 2019, which was created under the *Places to Grow Act, 2005*, was updated in May 2019 and amended in August 2020. It sets out where and how growth will occur across the G.G.H. to 2051 and that all planning decisions shall conform to it.

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. Relevant aspects of the Growth Plan, 2019 for this study include the following:

Managing and Directing Growth

- Growth will be directed to settlement areas and within settlement areas in areas with existing or planned public service facilities;
- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential with convenient access to local stores, services and public service facilities;
- Municipalities should plan for a diverse range and mix of housing options, including second units and affordable housing, to accommodate people at all stages of life, and to accommodate the needs of all household sizes and incomes;
- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of mixed-use, pedestrian-friendly urban environments; and
- Municipalities should preserve lands within settlement areas in the vicinity of major highway interchanges, ports, rail yards and airports for manufacturing and associated retail, office and ancillary facilities where appropriate.

Minimum Intensification Targets¹

- New minimum intensification targets, the minimum percentage of all residential development occurring annually within the delineated built-up area (B.U.A.), have been created for upper-tier and single-tier municipalities in the G.G.H. There are two geographic groups for intensification targets. The County of Brant is in the

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.2.



lower intensification target group, which requires that by the time the next M.C.R. is approved and in effect, and for each year thereafter, the County maintain or improve upon the minimum intensification target contained in the O.P.

- It is important to note that all upper-tier and single-tier municipalities within the G.G.H. can apply for alternative intensification targets.

Minimum Greenfield Density Targets¹

- New minimum density targets have been created for the horizon of the Growth Plan, 2019 for G.G.H. upper-tier and single-tier municipalities and include two geographic groups. It is important to note that the greenfield density targets established in the Growth Plan, 2019 do not include employment lands.² The County of Brant is in the lower density target group, which is required to plan to achieve within the horizon of this Plan a minimum density target that is not less than 40 residents and jobs combined per hectare.
- All upper-tier and single-tier municipalities can apply for alternative designated greenfield area (D.G.A.) density targets.

Employment³

- According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within the settlement area. The density targets are to reflect the current and anticipated type and scale of employment that characterizes the Employment Area to which the target applies. Further, the minimum employment density target reflects opportunities for the intensification of Employment Areas on sites that support active transportation and are served by existing or planned transit.⁴
- As part of the Growth Plan, 2019, the Province allows for employment land conversions outside of an M.C.R., while ensuring protections are in place to safeguard key Employment Areas as needed.
- The conversion of employment lands to a designation that permits non-employment uses is allowed outside of an M.C.R., provided that

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.

² Ibid., section 2.2.7.

³ Ibid., section 2.2.4.

⁴ Ibid., section 2.2.5.



- there is a need;
- a significant number of jobs are maintained on those lands through the establishment of development criteria;
- there are no adverse effects on the viability of an Employment Area or the achievement of minimum intensification targets; and
- there are existing or planned services in place.¹

Settlement Area Boundary Adjustments and Expansions²

- The Growth Plan, 2019 places emphasis on a more outcome-focused approach to urban boundary expansions, rather than specifying types of studies required to justify the feasibility and location of expansions.
- Municipalities are allowed to undertake settlement area boundary expansions that are no larger than 40 ha (approximately 99 acres) outside of the M.C.R. process, subject to criteria.
- Settlement area boundary adjustments are also permitted outside of an M.C.R. provided there is no net increase in land within settlement areas, subject to criteria.
- If applicable, municipalities within the G.G.H. Outer Ring are required to identify excess lands and prohibit development on such lands to the horizon of this Plan.

Amendment 1 to A Place to Grow

On August 28, 2020, the Province released Amendment 1 to A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 which has been incorporated into an Office Consolidation, August 2020 document. The Growth Plan, 2019 has been amended in conjunction with a revised outcome-based Land Needs Assessment (L.N.A.) methodology for the G.G.H. These documents are in effect as of August 28, 2020.

The population and employment growth forecast horizon set out in Schedule 3 of the Growth Plan, 2019 and the applicable time horizon for land-use planning have now been extended to 2051. It is further noted that the recommended Schedule 3 growth forecasts are to be treated as minimums, with higher growth forecast alternatives permitted by upper- and single-tier municipalities through their respective M.C.R.

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.5.10.

² Ibid., section 2.2.8.



process.¹ If an alternative growth forecast that exceeds Schedule 3 of the Growth Plan, 2019 is utilized, the M.C.R. must demonstrate that the alternate growth scenario meets the Growth Plan, 2019 policy objectives of accommodating a range of housing choices to meet market demand and the needs of current and future residents, as well as providing additional labour opportunities for the G.G.H. labour market.² It should be noted that higher forecasts established by upper- and single-tier municipalities through their M.C.R.s will not apply to provincial ministries and agencies.³

2.1.1.3 Land Needs Assessment Methodology for the Greater Golden Horseshoe

The Minister formally issued the final Land Needs Assessment (L.N.A.) methodology on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.⁴ This methodology replaces the previous L.N.A. methodology for the G.G.H. that was issued on May 4, 2018. The revised L.N.A. methodology focuses on a more simplified and outcome-based approach in comparison to the 2018 L.N.A. methodology. Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019, to assess the quantity of land required to accommodate forecast growth.

The L.N.A. methodology identifies that the results of an L.N.A. can only be implemented through an M.C.R. As previously identified, an M.C.R. is a new O.P, or an Official Plan Amendment (O.P.A.) initiated by an upper- or single-tier municipality under section 26 of the *Planning Act*, which comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

“Community Areas: Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land

¹ Growth Plan, Office Consolidation 2020, Policy 5.2.4, p. 56.

² A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe, p. 6.

³ Growth Plan, 2019, Policy 5.2.4.8, p. 57.

⁴ A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



employment jobs. Community areas include *delineated built-up areas* and *designated greenfield areas*.”

“**Employment Areas:** Areas where most of the employment land employment jobs are (i.e., employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the employment area. Employment areas may be in both *delineated built-up areas* and *designated greenfield areas*.”¹

2.1.2 County of Brant Official Plan, 2012

2.1.2.1 Overview

The County of Brant O.P. (2012) is being reviewed as part of this M.C.R. process as it relates to growth management, growth forecasts, housing, and employment directions. As part of the M.C.R. and the O.P.’s five-year review process, the County is required to update the County’s O.P. with the current version of the Growth Plan, 2019 (as amended, Office Consolidation 2020). As previously discussed, the Growth Plan, 2019 requires municipalities to update their respective O.P. to a 2051 horizon, including reviewing and evaluating the minimum density and intensification targets and forecasts contained in the Growth Plan as part of the M.C.R. process. The County is creating a new O.P. as part of the M.C.R.

In the current County of Brant’s O.P. (2012), Primary Settlement Areas, including Paris, St. George and Cainsville, areas that are fully serviced, are identified as preferred growth areas. It is important to note that while the Cainsville settlement area is currently identified in the County’s O.P. as a Primary Settlement Area, it does not have a provincially delineated B.U.A. or vacant residential land for urban development, which excludes it from the provincial L.N.A. methodology. The new Official Plan has deemed Cainsville as a Secondary Settlement Area and is not a Strategic Growth Area and will not have additional residential growth.

The County’s partially serviced Secondary Urban Settlement Areas include Mount Pleasant and Oakhill/Airport. These areas are anticipated to accommodate a modest amount of the new development. Other Secondary Urban Settlement Areas include Burford, Scotland, and Oakland which have private services. These areas in addition to the other settlements (Hamlets and Rural Residential Areas) without County water and

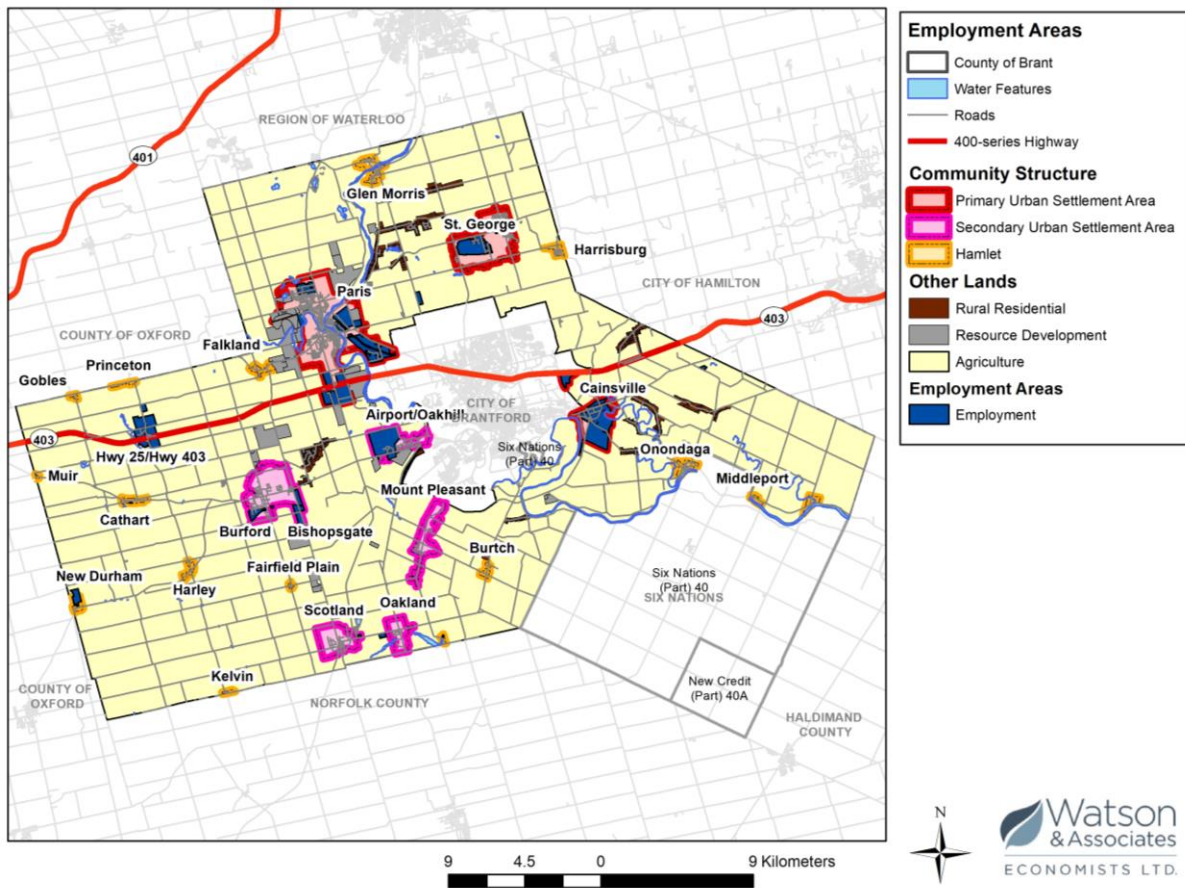
¹ Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 6, 7 and 15 to 18.



sewer services, are projected to accommodate a limited amount of forecast growth within the County. The current O.P. (2012) also notes limited opportunities for growth in the remaining rural area through severance and Additional Residential Unit (A.R.U.) opportunities.¹

Figure 2-1 provides a map of the settlement types.

Figure 2-1
County of Brant
Current County of Brant O.P. (2012)
Settlement Classification



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

The County's current O.P. (2012) defines three major housing density types generally based on housing type and density (i.e., number of units per ha). Low density includes

¹ County of Brant, O.P., 2012, Policy 1.11.2.4.1, p. 1-11.



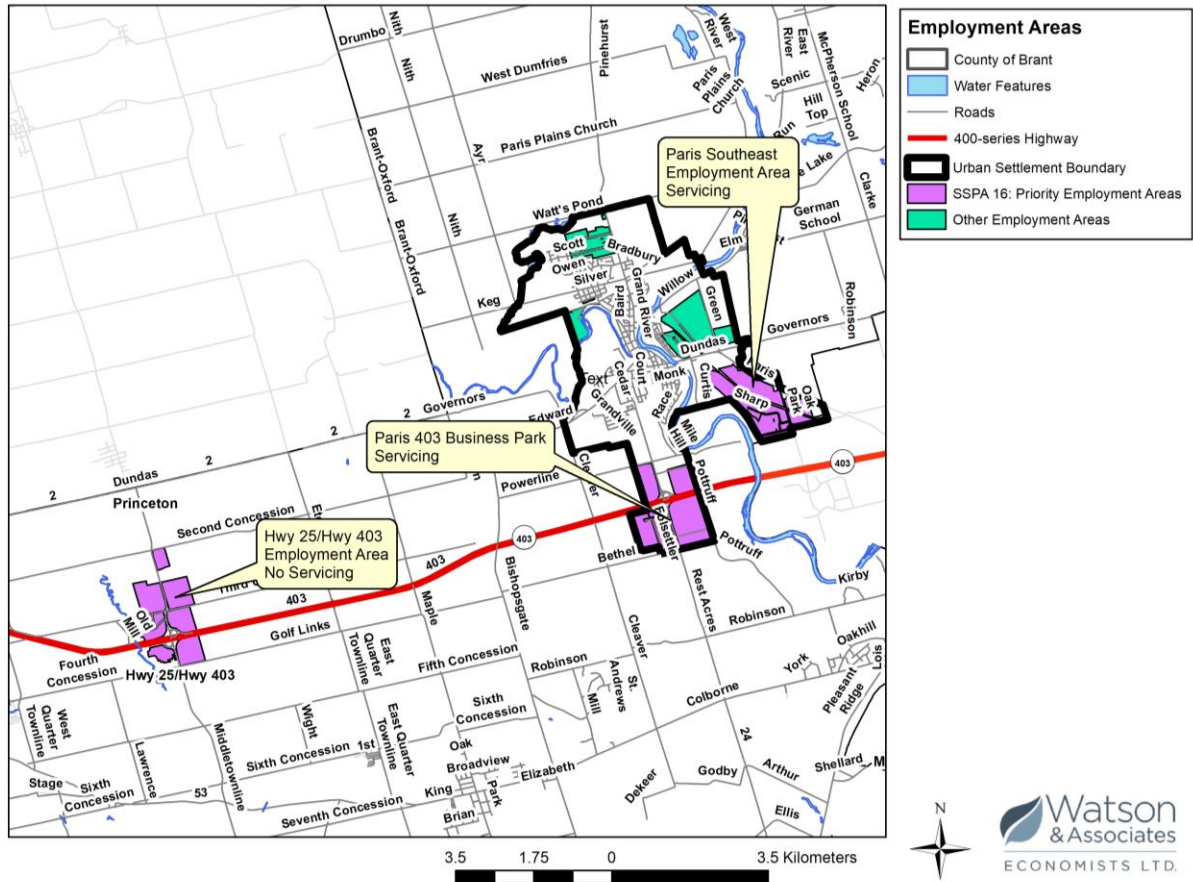
housing developments with a density not exceeding 20 units per ha and generally includes single detached, semi-detached and duplexes. Medium density includes housing developments permitted in low density with a density between 20 to 40 units per ha, as well as street fronting townhouses and low-rise apartments not exceeding 40 units per ha. High density includes all other housing types permitted in low and medium density with a density of 40 to 100 units per ha, as well as high-rise apartments.¹ The County's O.P. generally does not permit high-density housing forms with a density greater than 100 units per ha.

The County has one Employment Area designation in the County's current O.P. (2012), which includes both serviced and unserviced Employment Areas. In addition, the County has Site-Specific Policy Areas (S.S.P.A.), including a Priority Employment Area overlay (S.S.P.A. 16), which provides protection of these employment lands from conversions and identifies these areas as a priority for future Employment Area development. S.S.P.A. 16 identifies three Employment Areas as Priority Employment Areas, including the Paris 403 Business Park, a portion of the Paris Southwest Employment Area and a dry industrial area near the Highway 25 and Highway 403 interchange. These lands are located along Highway 403, as identified in Figure 2-2.

¹ County of Brant, O.P., 2012, Policies 3.3.4., 3.3.5 and 3.3.6, pp. 3-11 to 3-12.



Figure 2-2
County of Brant
Current County of Brant O.P. (2012)
S.S.P.A. 16 – Priority Employment Areas



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Key growth management targets of the current County's O.P. (2012) include the following:

- The D.G.A. of the County is planned to achieve a minimum density target that is not less than 30 residents and jobs combined per hectare, increasing to 35 residents and jobs combined per hectare by 2012, and 40 residents and jobs combined per hectare by 2022;¹

¹ County of Brant, O.P., 2012, Policy 2.2.2.3., p. 2-3.



- A minimum three-year supply of land that is able to be serviced for designated residential and employment development, redevelopment, and intensification is to be maintained;
- At all times, the accommodation of a minimum of 10 years' residential growth, including development, redevelopment, and intensification, needs to be ensured.
- By the year 2015 and for each year thereafter, the County shall strive to meet a minimum target that 15% of all residential development occurring in the County is within the B.U.A., which includes the serviced areas of St. George and Paris, as well as Burford which is unserviced;
- Residential developments are not to exceed 100 units per ha; and
- An overlay should identify three Priority Employment Areas.

The existing County O.P. does not provide direction on the amount of growth allocated to the Urban System, and it does not provide a density target for Employment Areas.

2.2 Community Structure

The County of Brant includes a blend of urban and rural communities. Provided herein is an overview of the structural components of the Urban and Rural System, including an assessment of the existing County O.P. framework compared to the provincial Growth Plan, 2019 policy framework.

The Growth Plan, 2019 requires municipalities, through the M.C.R. process, to develop a hierarchy of settlement areas that identifies where and how the municipality will grow over the 2051 planning horizon. Further, the Growth Plan, 2019 requires the majority of the growth to be directed to the Urban System, comprised of fully serviced (water/wastewater servicing) settlement areas. In addition to an Urban System, the County of Brant has a large Rural System, comprising a large geographical area of the County. The Rural System also includes a large portion of the County's population within rural settlement areas and several vibrant Employment Areas. The structural components of the Rural System are different than the Urban System with respect to function, role and scale.



2.3 Urban System

The Urban System includes urban settlement areas that are to accommodate most of the future residential and non-residential development. A key objective of the Urban System is to direct growth where there is planned and existing infrastructure in a manner that supports the principles of complete communities. Complete communities include a diverse mix of land uses that provide opportunities to live, shop and work in the same community. According to the Growth Plan, 2019, the County of Brant is required to also establish a hierarchy within the Urban System and within settlement areas.¹

Within the Urban System, growth is to be prioritized within the B.U.A. The B.U.A. includes an area within a settlement that is municipally serviced (water and wastewater) and was delineated by the Province to represent the approximate area developed as of 2006. The County of Brant has two fully serviced settlements with a delineated B.U.A., including Paris and St. George. Figures 2-3 and 2-4 illustrates the B.U.A. and D.G.A. of the settlements of these two communities.

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.1., p. 14.



Figure 2-4
County of Brant
St. George Settlement Area
D.G.A. and B.U.A.



Municipalities are required to explore opportunities to delineate strategic growth areas (S.G.A.s), areas that primarily prioritize intensification growth within the B.U.A. S.G.A.s can include major redevelopment areas, corridors with high-order transit, Major Transit Station Areas (M.T.S.A.s) and Urban Growth Centres (U.G.C.s), as identified in the Growth Plan, 2019. Based on a review of the B.U.A.s of the two settlement areas, the B.U.A.s of the County do not offer a large enough geographic area and scale to identify S.G.A.s. As such, it is recommended that the County consider the entire B.U.A. as an S.G.A. for intensification.



2.3.1 What is the Urban Area?

The urban area includes settlement areas that have full municipal servicing. These settlements have a B.U.A. where growth is to be prioritize first within the municipality. Urban areas have a mix of uses that support complete communities, including Urban Employment Areas. Urban areas outside Urban Employment Areas are referred to as Community Areas.

Urban Areas include settlement areas with full municipal servicing.

It should be noted that the Growth Plan, 2019 and the provincial L.N.A. definition of Urban Area is based on the ability of a Settlement Area to accommodate growth through intensification in the B.U.A. A key objective of the Growth Plan is to take an intensification first approach to growth which involves directing growth to the B.U.A. Municipalities may have a different definition of an Urban Area; however, settlement area boundary expansions (identifying land needs) are required to follow the provincial policies. As such, if the Municipal definition of an Urban Area is broader than the Growth Plan definition, the Municipality should provide a further breakdown of the Urban Areas in the O.P. that identify those that meet the provincial requirements of Growth Plan, 2019, policies 2.2.1. and 2.2.8. and the provincial L.N.A.

2.3.2 What is an Employment Area?

Employment Areas are clusters of industrial or export-based employment. Employment Areas accommodate uses in a range of industrial sectors as well as limited commercial uses (uses that complement the Employment Area). Employment Areas provide opportunities for economic activities that cannot be accommodated other areas, given the potential for incompatibility of surrounding uses. Land uses such as major retail, large institutional uses (e.g., schools), and residential uses are considered sensitive uses and are not permitted within an Employment Area. The Growth Plan, 2019 requires upper- and single-tier municipalities, in consultation with lower-tier municipalities, to designate all Employment Areas in the O.P. and protect them for appropriate employment uses over the long term.¹

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.5., p. 19.



Non-residential uses on lands not classified as Employment Areas are a part of the Community Area that supports the settlement area. Community Areas are the lands within the urban settlement area (Primary Urban Growth Settlements) that exclude Employment Areas. Community Areas accommodate residential uses as well as non-residential uses that support local residents and visitors/tourists.

2.3.3 Structural Components of the Urban System

The following is a summary of the key structural components of the Urban System:

- **Built-up Area (B.U.A.)** – priority areas to accommodate urban growth.
- **Designated Greenfield Area (D.G.A.)** – developing areas to accommodate the remaining urban growth not accommodated in the B.U.A.
- **Employment Areas** – areas that are protected from sensitive uses and accommodate export-based or industrial employment.
- **Community Areas** – areas that accommodate residential and employment outside Employment Areas, including major retail.
- **Major Retail** – commercial uses that are part of the highest level of commercial hierarchy within the urban area. Major retail is often defined by size; however, it should also be defined based on function.

2.4 Rural System

The Rural System includes lands that are protected from large-scale urban development. A key objective of the Rural System is to protect agriculture land, resources and the natural environment, while encouraging economic and cultural activities that support the health and prosperity of rural communities.

2.4.1 What is the Rural Area?

The Rural Area is generally the area within the municipality with no or partial municipal servicing (water/wastewater servicing). According to the Growth Plan, 2019, the Rural Area is comprised of rural settlement areas, rural lands and prime agricultural lands.¹

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Definitions, p. 81.



Rural settlement areas include existing hamlets or similar existing small settlement areas that are long established in the O.P. These communities are typically serviced by individual, private, on-site water and/or private wastewater systems.¹ It is further noted that all settlement areas are identified as hamlets in the Greenbelt Plan such as rural settlements in the Oak Ridges Moraine Conservation Plan, or as minor urban centres in the Niagara Escarpment Plan, are considered rural settlement areas in meeting the Growth Plan, 2019 definition.² According to the Growth Plan, 2019, a limited amount of growth is allocated to rural settlement areas.³

Rural lands include non-prime agriculture lands (including rural residential lots) outside rural settlement areas. Rural lands accommodate uses that are not appropriate in settlement areas, including resource-based activities and recreational activities. Rural lands also include **Rural Employment Areas**,⁴ which are defined as a cluster of industrial activities outside settlement areas, typically with partial or no services. Future Rural Employment Area growth is largely to be directed to existing designated Rural Employment Areas (as of June 16, 2006) or through expansions to accommodate existing business operations.⁵

Prime agriculture areas are where prime agricultural lands predominate. This includes areas of prime agricultural lands and associated Canada Land Inventory Class 4 through 7 lands and additional areas where there is a local concentration of farms and ongoing agriculture activities. Prime agricultural areas are to be identified by the Ontario Ministry of Agriculture, Food and Rural Affairs (O.M.A.F.R.A).⁶

2.4.2 Structural Components of the Rural System

The following is a summary of the key structural components of the Rural System:

- **Rural settlement areas** – hamlets and small-scale settlements that are to accommodate a limited amount of growth on land with private or partial servicing. According to the Growth Plan, 2019, rural settlement areas should serve as

¹ Ibid.

² Ibid.

³ Ibid., p. 13.

⁴ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9., p. 27 and Definitions, p. 81.

⁵ Ibid., Policy 2.2.9., p. 27.

⁶ Ibid., Definitions, p. 79.



community hubs where public service facilities are maintained and adapted to the needs of the surrounding community.¹

- **Prime agriculture lands** – lands identified by the O.M.A.F.R.A. where agricultural uses predominate. These lands are to be protected; however, diversification of on-farm uses (uses that are secondary to the principal agricultural use of the property) is encouraged.²
- **Rural Employment Areas** – clusters of industrial activities outside settlement areas on non-serviced lands. Rural Employment Area growth is limited to existing designated lands (as of June 16, 2006) or through the expansion of existing business operations.
- **Other rural lands** – all other non-serviced lands. These lands are to accommodate a limited amount of growth. Growth on these lands is primarily limited to resource development, recreational-based and other economic activities not accommodated within settlement areas.

2.5 Existing County of Brant Community Structure

The current County of Brant O.P. (2012) Community Structure includes the following components:

- Primary Settlement Areas
 - Full Services with delineated B.U.A.: Paris and St. George
 - Full Services: Employment Areas – Paris, St. George and Cainsville
- Secondary Settlement Areas
 - Partial Services: Mount Pleasant and Oakhill
 - Partial Services: Airport Employment Area
 - Private Services with delineated B.U.A.: Burford
 - Private Services without delineated B.U.A.: Scotland and Oakland
 - Private Services Employment Areas: Highway 25/Highway 403 Employment Area
- Hamlets
 - Private Services: 15 settlements
- Other Employment Areas (Not a Primary or Secondary Settlement Area)

¹ Ibid., Policy 2.2.9, p. 27 and Definitions, p. 81,

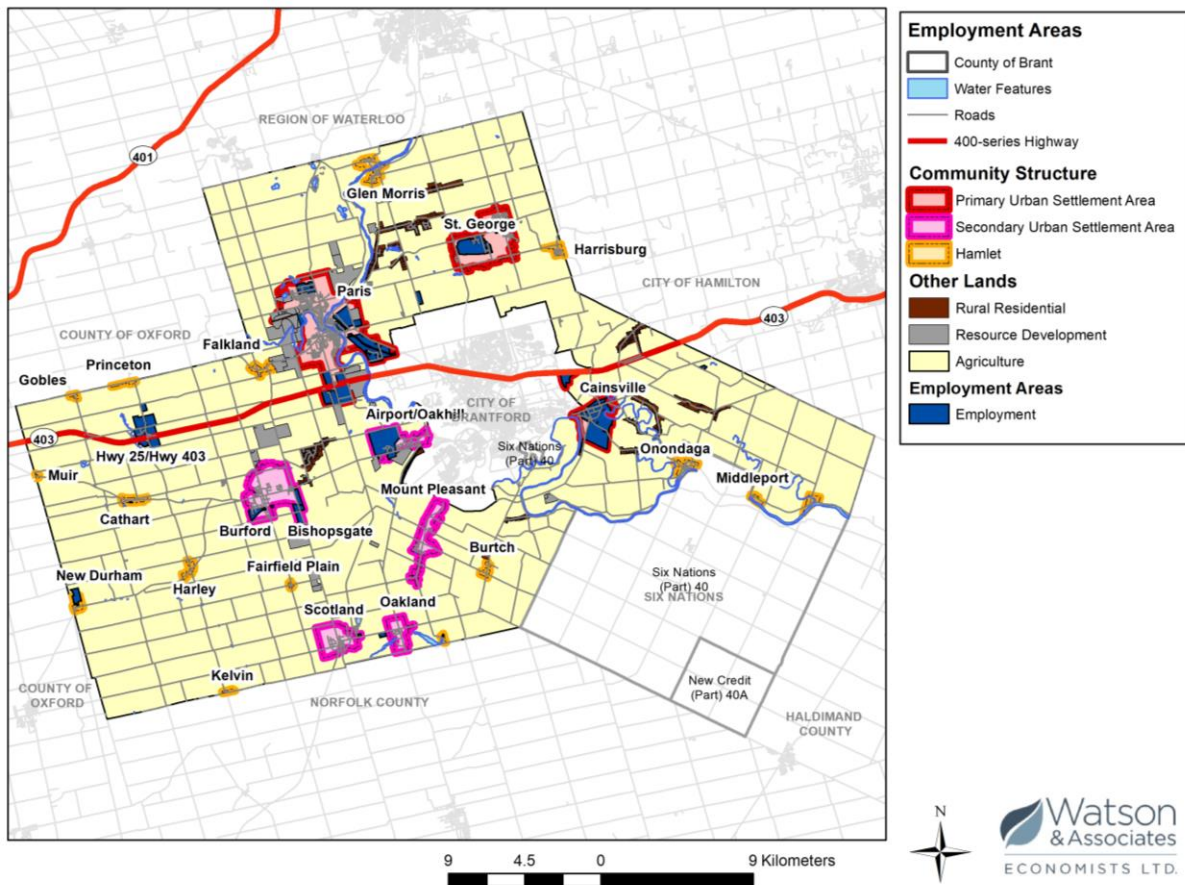
² Ibid., p. 78.



- Private Services: five Employment Areas
- Rural Residential Areas
 - Private Services
- Resource Development
- Agriculture

The existing County of Brant Community Structure is provided in Figure 2-5.

Figure 2-5
County of Brant
Current County of Brant O.P. (2012)
Existing Community Structure



Source: Watson & Associates Economists Ltd. based on current County of Brant O.P. (2012).



2.5.1 Proposed Changes to the County's Community Structure

2.5.1.1 Urban System and Rural System

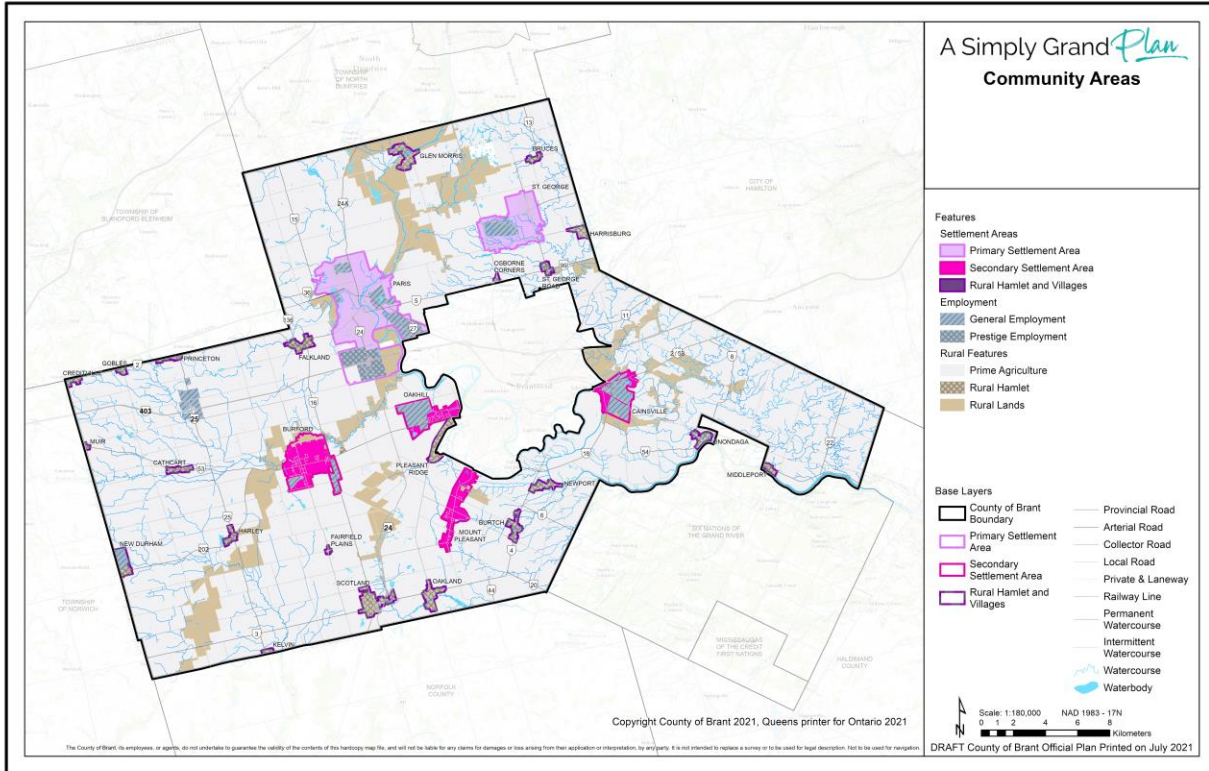
A key distinction between the Rural System and the Urban System is the amount and type of growth to be allocated. The Growth Plan, 2019 requires the majority of the forecast growth to be allocated to the areas with servicing (water/wastewater), i.e., Primary Settlement Areas (Growth Centres). While Secondary Settlement Areas have only partial servicing and limited municipal servicing (some cases servicing studies are pending) are classified as part of the Urban System in the County's new O.P., recognizing the development character of the settlement area. For the purposes of the M.C.R. Report, Secondary Settlement Areas are grouped within the Rural System in accordance with the provincial L.N.A. The Secondary Settlement Areas are anticipated to accommodate some growth based on existing servicing capacity and subject to further servicing review. In terms of a hierarchy these areas are considered a higher priority for growth than the villages and hamlets and remaining rural area. The urban land needs assessment is based on fully-serviced lands within the Primary Settlement Area and includes Paris and St. George.

Growth within the Rural System is to be compatible with the rural setting and provide opportunities to support the rural base.

Figure 2-6a and 2-6b summarizes the proposed Urban and Rural System.



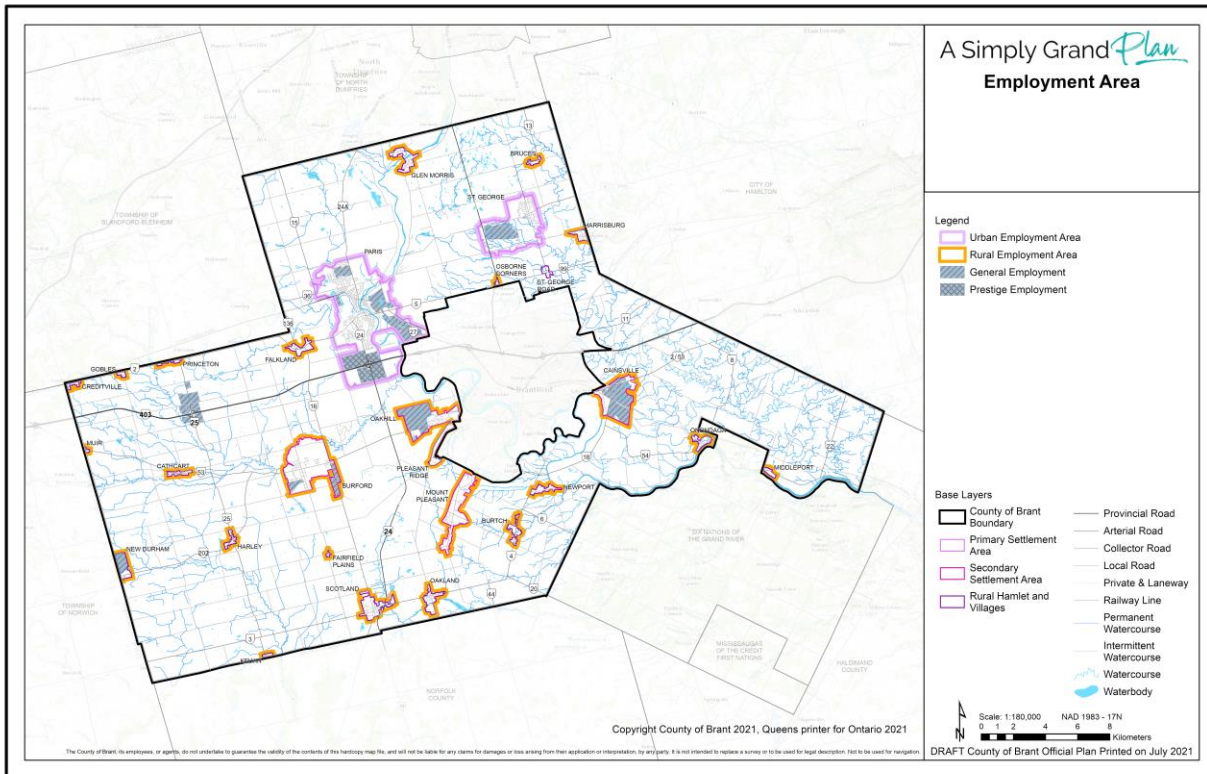
Figure 2-6a
County of Brant
Proposed Urban and Rural System



Source: County of Brant, Draft New O.P.



Figure 2-6b
County of Brant
Proposed Urban and Rural System
Employment Areas



Source: County of Brant, Draft New O.P.

2.5.1.2 Rural System Components

It is recommended that the County consider providing a distinction in the O.P. between the Rural System and the Urban System on the basis of servicing and the amount of growth to be accommodated within the Rural System. Further, the County's hamlets are an integral component of the County's rural area. While the settlement areas of Cainsville, Mount Pleasant, Burford and Oakhill meet the definition of rural settlement area according to the Growth Plan, 2019, the County should consider classifying these settlement areas as Secondary Settlement Areas since these settlement areas that have the opportunity to accommodate moderate urban growth. As Secondary Settlement Areas, these rural settlement areas will be considered a priority in directing growth outside the Primary Settlement Areas of Paris and St. George.



Within the Rural System, is proposed to include the following components in the County's new O.P.:

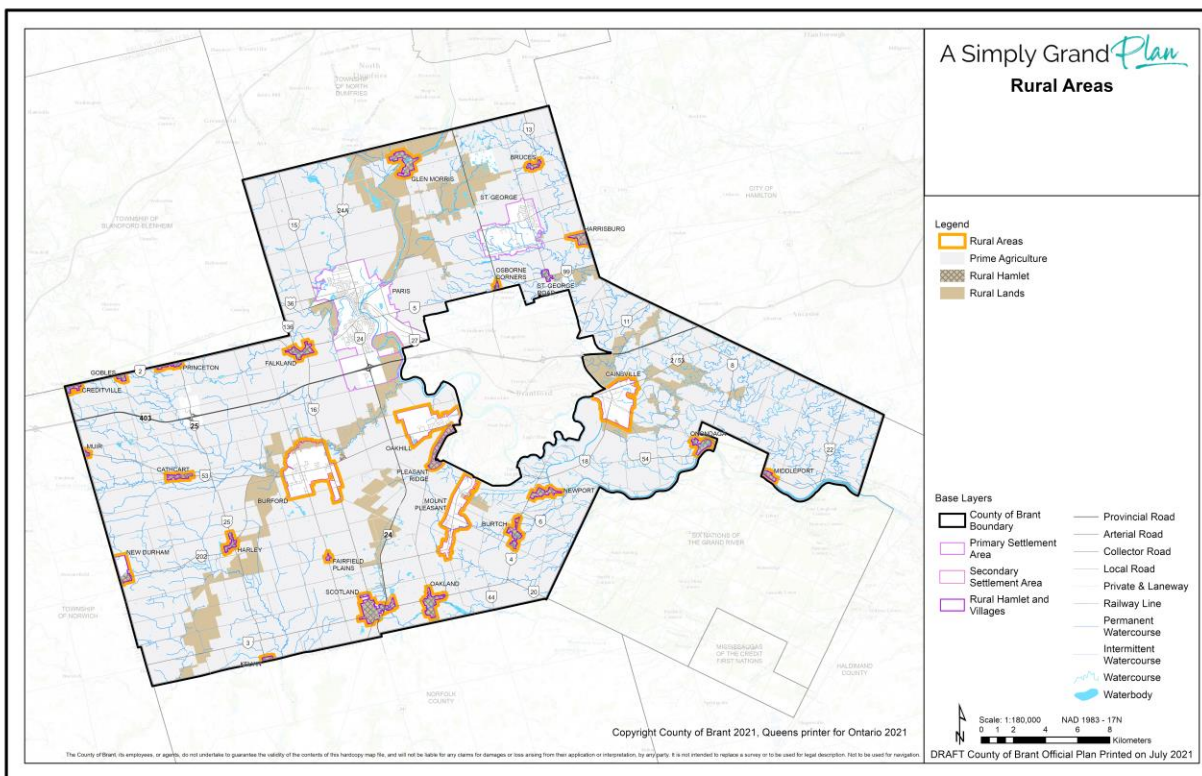
- Rural Hamlets and Villages
- Rural Employment Area (General Employment)
- Rural Lands
- Prime Agriculture Holding (Overlay)
- Prime Agriculture
- Parks and Open Space
- County Natural Heritage System Designation
- Erosion Hazard Lands and Flooding Hazards Designation.

Secondary Settlement Areas are proposed to be classified as part of the Urban System in the County's new O.P., however are subject to Growth Plan, 2019 Rural Settlement Area policies, including settlement area boundary expansion policies. As previously discussed, for the purposes of this M.C.R. Report and in accordance with the provincial L.N.A., Secondary Settlement Areas are grouped with the Rural System.

Figure 2-7 provides the proposed Rural System, including Secondary Settlement Areas. Refer to Figure 2-6b for Employment Areas.



Figure 2-7
County of Brant
Proposed Rural System, including Secondary Settlement Areas



Source: County of Brant, Draft New O.P.

2.5.1.3 Urban System Components

The Paris and St. George settlement areas are proposed as Primary Growth Settlements. These settlement areas provide full services, a delineated B.U.A., a concentration of public facilities and a range of land uses. These Primary Growth Settlements comprise the core settlements within the Urban System. Secondary Settlement Areas are considered a secondary component of the Urban System.

Within the Urban System, the following are Settlement Areas:

- Primary Settlement Areas (Growth Centres) – subject to Land Needs Assessment; and
- Secondary Settlement Areas (limited servicing and studies pending)

Within the Urban System, the following are the designations:



- Neighbourhoods Designation
- Community Corridors Designation
- Community Nodes Designation
- Parks and Open Space Designation
- Prime Agriculture Holding (Overlay, Secondary Settlement Areas only)
- Employment Areas:
 - Prestige Employment Designation (Highway 403)
 - General Employment Designation
- Natural Heritage System and Natural Hazards:
 - County Natural Heritage System Designation
 - Erosion Hazard Lands and Flooding Hazards Designation

Within the Urban System, the hierarchy would further be broken down with respect to growth opportunities, as follows:

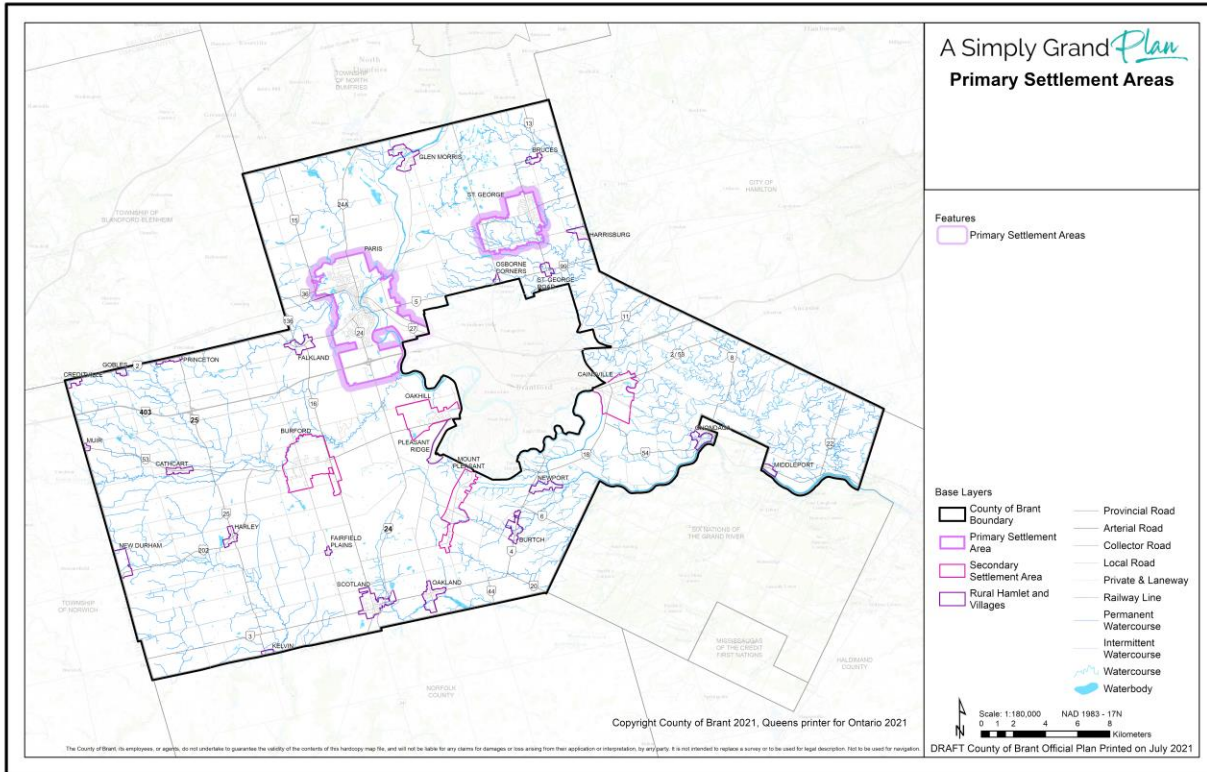
- D.G.A.;
- B.U.A.; and
- Urban Employment Areas.

Figure 2-8 provides a map of the proposed Urban System, Primary Settlement Areas.

As previously noted, Secondary Settlement Areas are proposed to be classified as part of the Urban System, however for the purposes of this M.C.R. are classified as within the Rural System.



Figure 2-8
County of Brant
Proposed Urban System – Primary Settlement Areas



Source: County of Brant, Draft New O.P.



Chapter 3

Population and Housing Analysis



3. Population and Housing Analysis

This chapter provides an assessment of forecast population and housing growth trends for the County of Brant to the year 2051 within the broader context of the G.G.H. An overview of historical population and housing trends, as well as economic and demographic growth drivers, is also included to provide context regarding the long-term growth outlook for the County. The allocation of population and housing by Urban Settlement Area and Rural System in addition to planning policy area ((D.G.A., B.U.A. and Rural Area) is discussed in Chapter 4 – Population and Housing Growth Allocations.

3.1 Introduction

3.1.1 *What Drives Population Growth?*

A broad range of considerations related to demographics, economics and socio-economics is anticipated to impact future population and employment growth trends throughout the County of Brant over the 2016 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the form, density, and location of residential and non-residential development.

As a starting point, 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 economy within the County and the surrounding region – which in this case is largely represented by the G.G.H. The G.G.H. represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents a portion of the commuter-shed for the County of Brant. Potential employment opportunities within the County and the surrounding commuter-shed represent the primary driver of net migration to this area.

The employment base within the County of Brant and the surrounding commuter-shed can be grouped into two broad categories – export-based sectors and community-based sectors, the latter primarily referring to local population serving employment. Export-based sectors are comprised of industries (i.e., economic clusters) that produce goods that reach markets outside the community (agriculture and primary resources, manufacturing, research and development as well as other knowledge-based industries). Local industries also provide services to temporary and/or other residents



of the municipality not captured by Census data as part of the permanent population base such as hotels, restaurants, tourism-related sectors, colleges and universities, as well as businesses related to financial, professional, scientific and technical services.

Economic growth in the regional export-based economy generates wealth and economic opportunities which, in turn, stimulates community-based or population-related employment sectors, including retail trade, accommodation and food and other service sectors. Economic development subsequently drives the need for labour force growth which is largely generated from positive net migration. Ultimately, population growth in the County of Brant within the 0-64 age group, will continue to be largely driven by net migration associated with the working age population and their dependents (i.e., children, spouses not in the labour force, others). On the other hand, population growth of the County's 65+ population will continue to be largely driven by the aging of the County's existing population and, to a lesser extent the attractiveness and affordability of the County to new seniors. A more detailed discussion of the long-term economic, socio-economic and demographic drivers of long-term population and employment growth in Brant County are provided in section 3.3.

3.1.2 Population, Housing and Employment Forecasting Approach

The population, household and employment growth forecast provided herein has been developed in accordance with the provincial L.N.A. methodology. The provincial L.N.A. methodology requires a population forecast by age structure and a housing forecast to be completed by applying an age-specific household formation rate based on propensities to choose different types of dwellings. This approach is commonly referred to as the cohort-survival population forecast methodology.

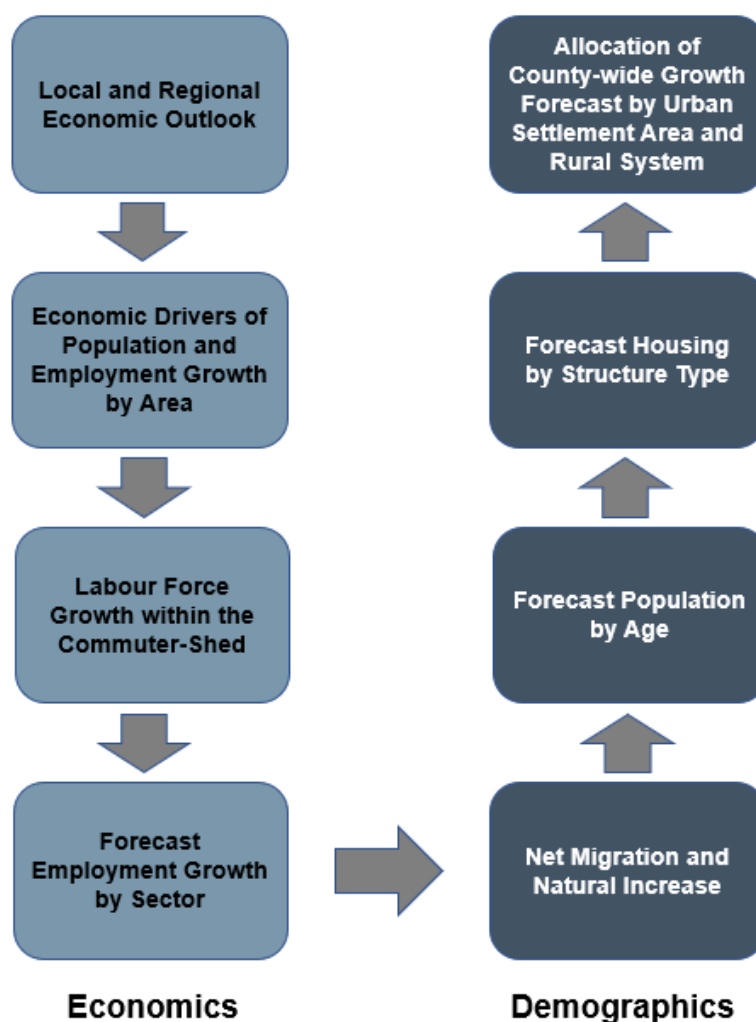
The cohort-survival population forecast methodology uses, as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality, less out-migration, by age group). Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy.

Generally, households occupied by persons between the age of 30 and 64 have a higher average persons per unit (P.P.U.) when compared to households occupied by



younger and older adults (19 to 29 and 65+ age groups). Comparatively, Brant County has a higher proportion of persons who are 65 years of age or older relative to the Province as a whole. This is important to recognize because as the County's population ages over the forecast planning horizon, its average P.P.U. level is anticipated to decline. The results of this demographic trend are further discussed in section 3.3.6 regarding forecast housing needs to 2051. Figure 3-1 summarizes the population, housing and employment forecast methodology.

Figure 3-1
Approach to Long-Term Population, Household and Employment Forecast





3.1.3 Housing Classification

Provided below is a summary of the housing structure types by density grouping included in the housing analysis of this report. The housing structure types have been categorized to align with Statistics Canada housing data and is consistent with the provincial L.N.A. These density groupings are compared with the County of Brant O.P. definitions in Figure 3-2 and are summarized below:

- Low-density residential development includes single detached and semi-detached housing. These are housing units with no units below or above. The definition of low-density residential development in the County of Brant O.P. also includes duplexes, Additional Residential Units (A.R.U.)¹ and street-fronting townhouses not exceeding 20 units per ha.²
- Medium-density residential development includes ground-oriented townhouse units, also referred to as rows and apartments in duplexes (two units located one above the other). The definition of medium-density residential development in the County of Brant O.P. includes units of the housing type permitted in the low-density category with a density between 20 units to 40 units per ha, as well as stacked-towns, special needs buildings, and low-rise apartments (four or less storeys) with a maximum density of 40 units per ha.³
- High-density residential development includes low-rise and high-rise apartment buildings. These are units that are below and/or above a unit. It is important to note that a secondary suite added to a single detached, semi-detached or townhouse unit is considered high density, reflecting the average occupancy of these units. The County of Brant O.P. classifies high-density development as high-rise apartments, as well as any unit type previously mentioned that exceeds 40 units per ha (the maximum is 100 units per ha).⁴

¹ Also referred to as Secondary Suites. According to the County of Brant O.P., an A.R.U. is permitted on the same lot as the primary dwelling, either internally within the primary dwelling or externally or within a detached structure.

² County of Brant Official Plan, 2012, Policy 3.4, pp. 3-10 to 3-14.

³ Ibid.

⁴ Ibid.



Figure 3-2
Housing Structure Type Classification

Housing Structure Type	County of Brant Municipal Comprehensive Review, 2021	County of Brant Current O.P. (2012)
Single Detached and Semi-detached	Low Density	Low Density (maximum density of 20 units per ha)
Duplex	Medium Density	Low Density (maximum density of 20 units per ha)
Townhouse/Row	Medium Density	Low Density: street-fronting townhouses (maximum density of 40 units per ha) Medium Density: stacked townhouses (maximum density of 40 units per ha)
Apartments	High Density	Medium Density: low-rise apartment buildings with a maximum height of four storeys High Density: apartment building exceeding four storeys and other units exceeding 40 units per ha (maximum 100 units per ha)
Additional Residential Units (A.R.U.)	High Density	Low Density



3.2 Review of Historical Census Population and Housing Growth Trends

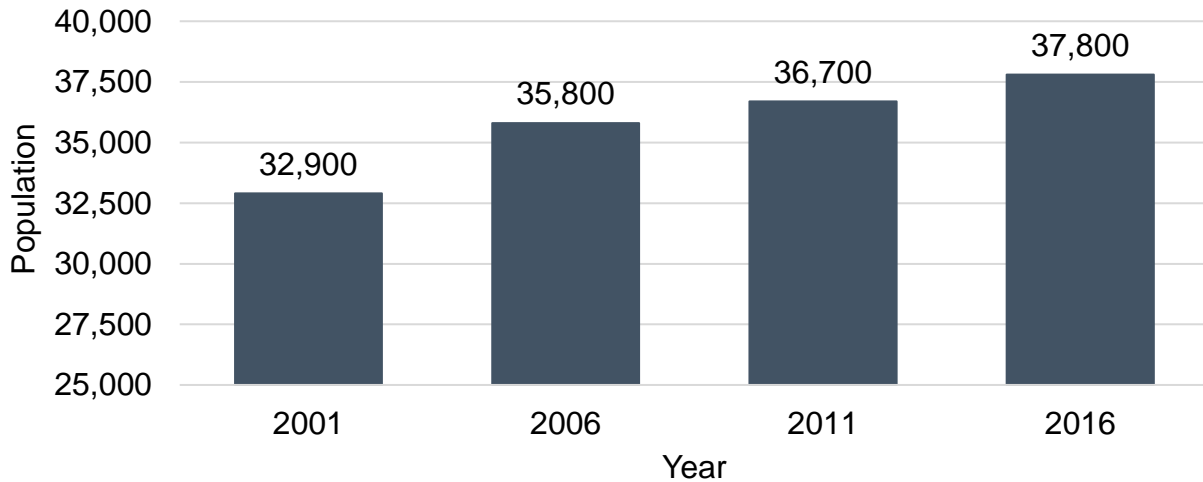
3.2.1 County of Brant Population Growth, 2001 to 2016

Figure 3-3 summarizes historical population for the County of Brant over the 15-year period from 2001 to 2016. As illustrated, the County's population base increased from 32,900 in 2001 to 37,800 in 2016. Over the past decade, the population base within the County has increased by 4,900 persons, or approximately 0.9% per year. As a comparison, the average annual population growth rate within the G.G.H. was 1.3%.

Figure 3-4 identifies the municipalities within the G.G.H., including the municipalities that comprise the Greater Toronto and Hamilton Area (G.T.H.A.) as well as those located in the G.G.H. Outer Ring. Figure 3-5 summarizes the annual population growth rate of all upper-tier/single-tier municipalities within the Outer Ring of the G.G.H. Overall, this area achieved an average annual population growth rate of 1.0% over the 2001 to 2016 period. As summarized in Figure 3-5, the City of Barrie, the County of Simcoe and the City of Guelph experienced the highest rate of annual population growth within the G.G.H. Outer Ring. The County of Brant's growth rate was close to the middle of the annual population growth range of G.G.H. Outer Ring municipalities, which ranged from 0.2% in the County of Haldimand to 2.0% in the City of Barrie. Over the 2001 to 2016 historical period, the County of Brant represented 2% of the population growth within the G.G.H. Outer Ring.



Figure 3-3
County of Brant
Historical Population, 2001 to 2016



Note: Population includes net Census undercount.

Source: Derived from Statistics Canada Census, 2001 to 2016, by Watson & Associates Economists Ltd.

Figure 3-4
Map of the G.T.H.A. and G.G.H. Outer-Ring

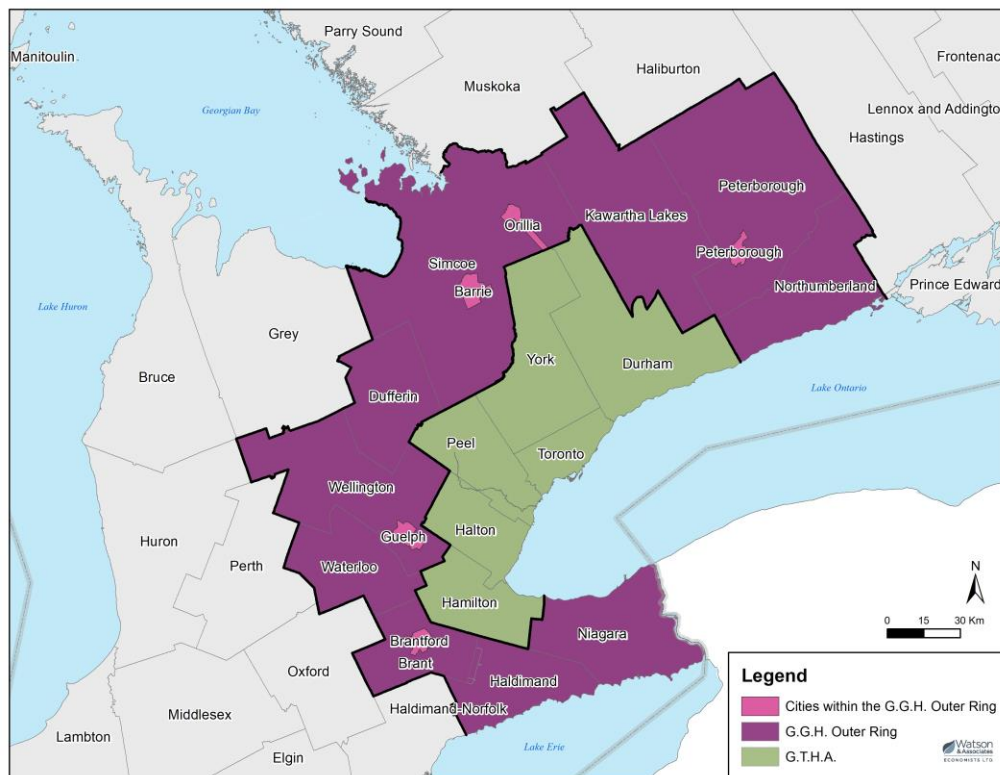
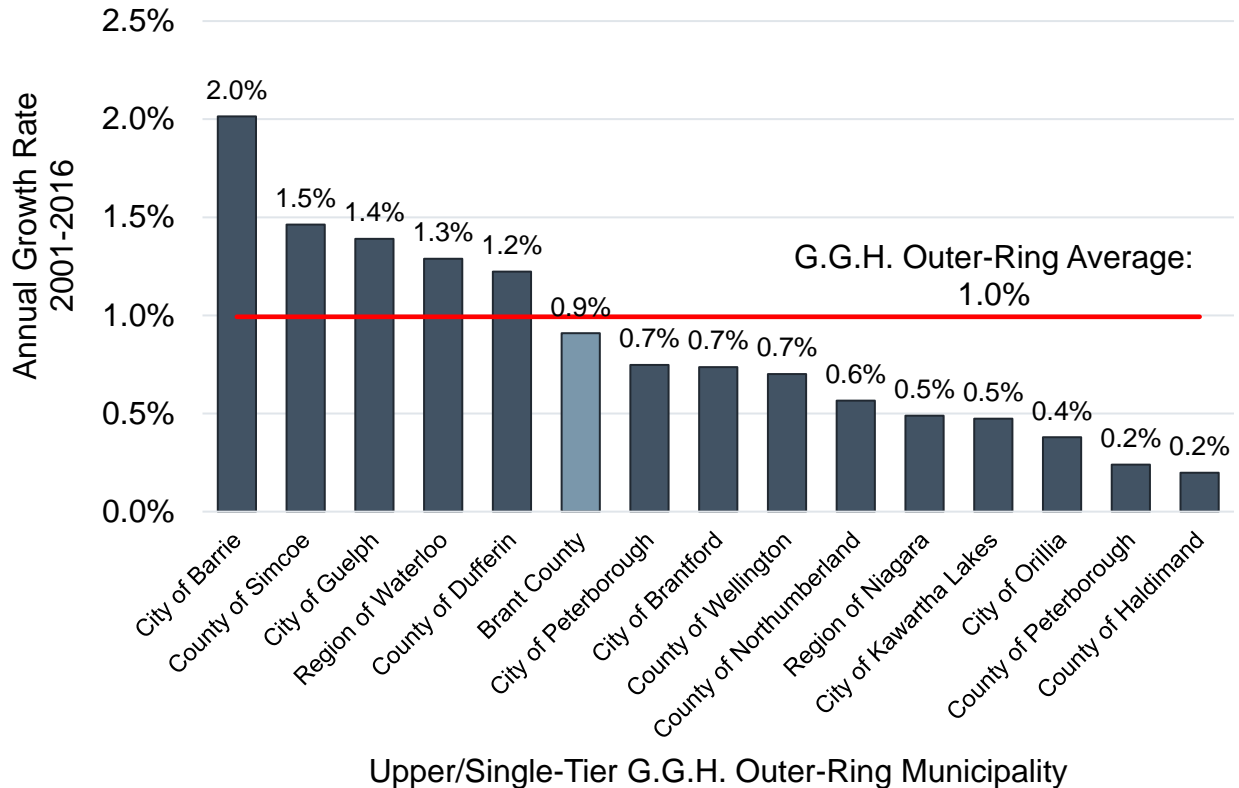




Figure 3-5
Outer-Ring G.G.H.
Historical Population, 2001 to 2016



Source: Derived from Statistics Canada Demography Division data by Watson & Associates Economists Ltd.

3.2.2 County of Brant and G.G.H. Historical Population Trends, 2001 to 2016

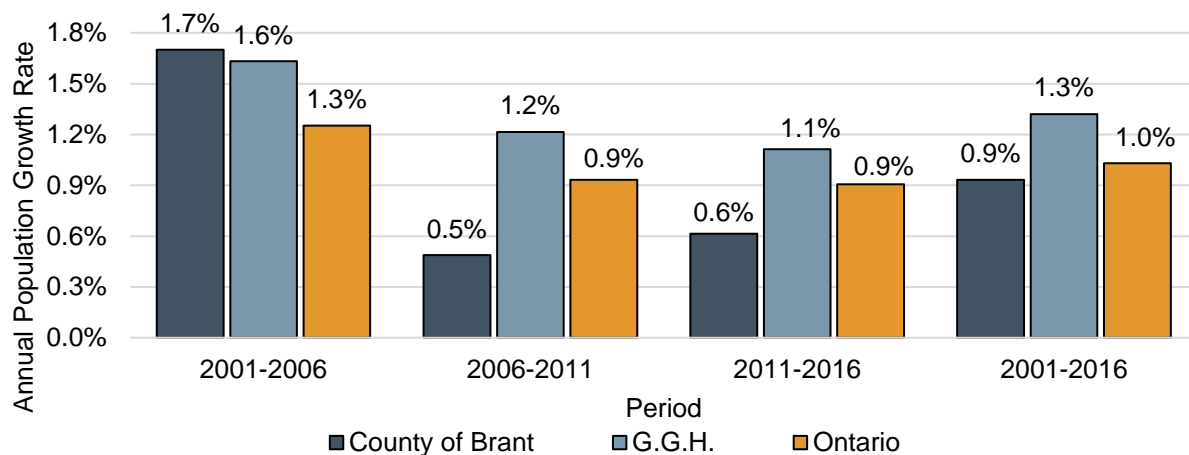
Figure 3-6 provides a summary of annual historical population growth rates for the County of Brant, the G.G.H., and the Province as a whole, over a 15-year period from 2001 to 2016. Key observations include the following:

- As previously indicated, the County of Brant experienced an annual population growth rate of 0.9% from 2001 to 2016. This is comparable to the provincial average of 1.0% but below the G.G.H. average of 1.3%;
- The annual population growth rate in the County of Brant of 1.7% from 2001 to 2006 was higher than the G.G.H. and provincial average rates, but the County's growth rate declined to 0.5% from 2006 to 2011. The broader area also



- experienced a decline during this time period as a result of the 2008/2009 global economic recession; however, it was more profound in the County of Brant; and
- Population growth rates over the most recent Census period (2011 to 2016) within the County of Brant (0.6%) have been below both the G.G.H. (1.1%) and the provincial average (0.9%).

Figure 3-6
County of Brant, G.G.H. and Ontario
Historical Population Growth Rate Trends, 2001 to 2016



Note: Population includes net Census undercount.

Source: County of Brant and Ontario derived from Statistics Canada Census and Annual Demographics Estimates data, and G.G.H. from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, August 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd.

3.2.3 County of Brant Trends in Total Population Age Structure

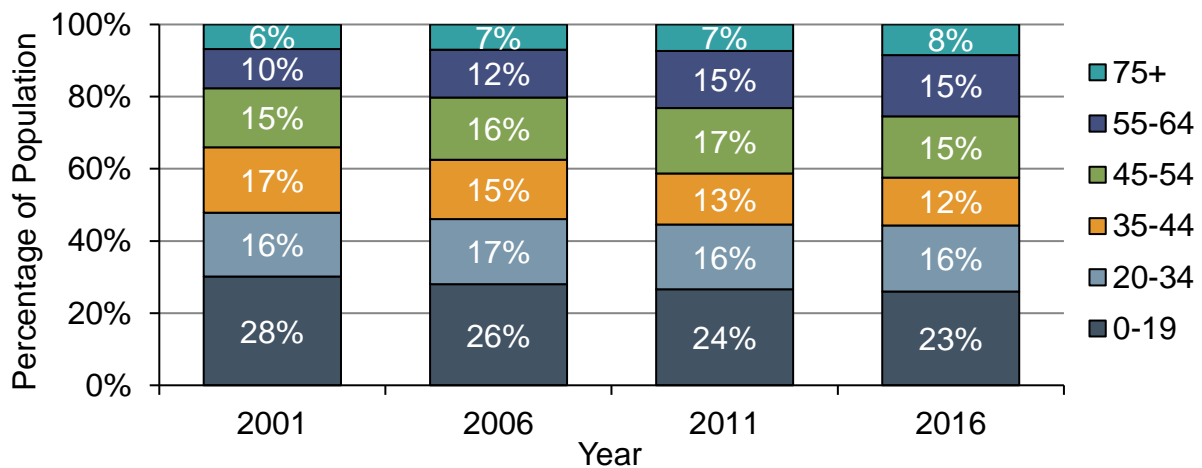
Figure 3-7 summarizes historical trends in population structure by major age group over the 2001 through 2016 period. Key observations regarding the County of Brant's historical population by age include the following:

- In 2016, the 0-19 age group (youth population) in the County of Brant accounted for 23% of the total population. Over the 2001 to 2016 period, the population in this age cohort decreased by 400, declining in population share from 28% to 23%;
- The County's young adult/adult population share (20-54 years of age) declined over the same period, comprising approximately 43% of the population in 2016:
 - The 20-34 age cohort (young adults), which comprised an estimated 16% of the population in 2016, remained stable in proportion from 16% in 2001;



- The percentage of the 35-44 age group decreased from 17% in 2001 to 12% in 2016; and
- The percentage of adults 45-54 years old accounted for 15% of the 2016 population, and remained stable at 15% in 2001;
- Collectively, the share of the County's 55+ population base increased significantly over the same period. More specifically:
 - The 55-74 age group (empty nesters/younger seniors) increased by 11 percentage points between 2001 and 2016, from 17% to 26%; and
 - The 75+ age group (older seniors) increased moderately from 6% in 2001 to 8% in 2016. Looking forward over the next three decades, the share of the County's population in the 75+ age group is anticipated to increase significantly, driven by the aging of the Baby Boom population. This is anticipated to place increasing demand on the need for seniors' housing, affordable housing, as well as social services to support the County's growing population base of seniors.

Figure 3-7
County of Brant
Population by Age Cohort, 2001 to 2016



Note: Population includes net Census undercount.

Source: Population forecast by age derived from 2001 to 2016 Statistics Canada Census and Annual Demographics Statistics data by Watson & Associates Economists Ltd.

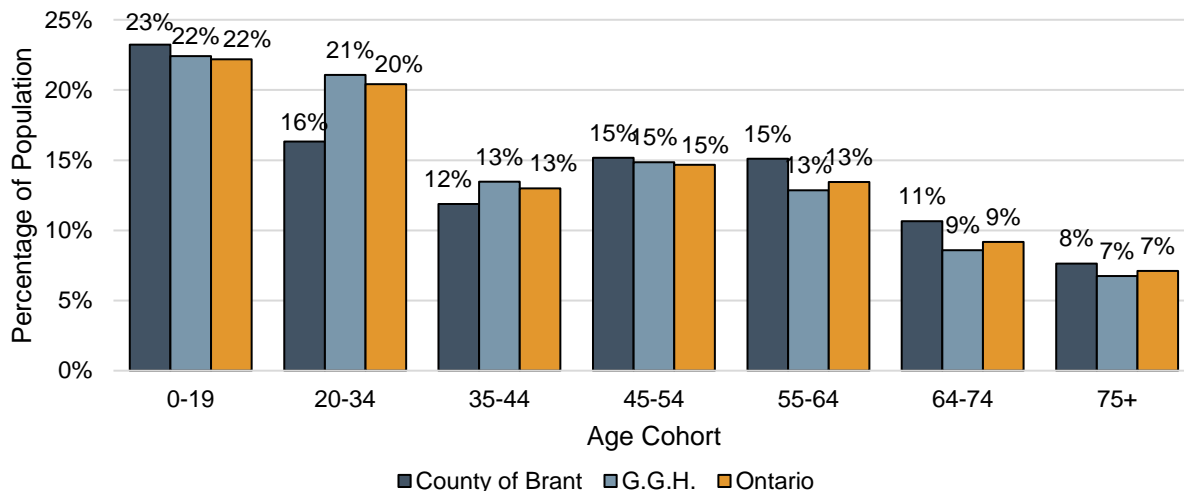
Figure 3-8 summarizes the 2016 population age structure in the County of Brant compared to the G.G.H. and the Province of Ontario as a whole. Key observations



regarding the County of Brant's historical population by age, in comparison to the G.G.H. and the Province, include:

- With the exception of the County's large youth population (ages 0-19), the County of Brant 2016 age structure is older than that of the G.G.H. and the provincial average;
- Comparatively, Brant County has a slightly higher share of youth population (0-19) relative to the G.G.H. and the provincial average;
- A lower proportion of the population in the County of Brant is concentrated in the 20-44 age group in comparison to the G.G.H. and the Province of Ontario as a whole; and
- The County of Brant has a higher proportion of adults over the age of 55, when compared to the G.G.H. and the Province of Ontario.

Figure 3-8
County of Brant,
G.G.H. and Ontario Population by Age Cohort, 2016



Note: Population includes net Census undercount.

Source: Derived from Statistics Canada Census and Annual Demographics Estimates data by Watson & Associates Economists Ltd.

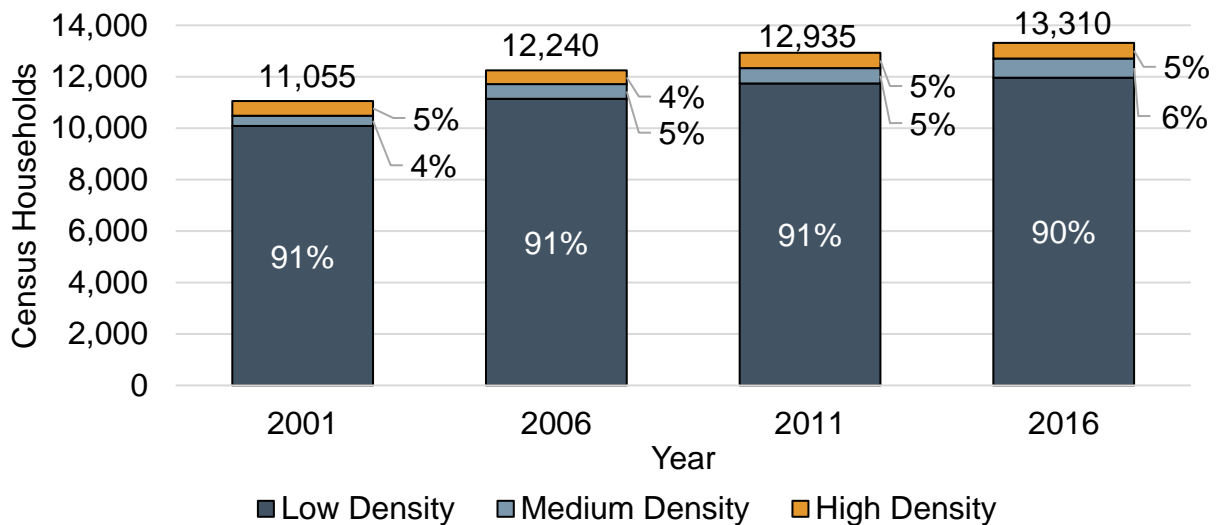
3.2.4 Historical Census Housing Trends, 2001 to 2016

Similar to population growth trends, the County of Brant has recently experienced a steady rate of housing growth, as measured by Statistics Canada Census data between 2001 and 2016. During this historical period, the County's housing base has increased by approximately 2,250 households from 11,060 to 13,310, which represents an



increase of approximately 150 Census housing units per year. Figure 3-9 and Figure 3-10 summarize housing growth by density type between 2001 and 2016. As previously discussed, low-density households largely include single and semi-detached units, townhouses and apartments in duplexes comprise medium-density households, while apartments are included in the high-density category. Historically, low-density housing has made up the majority of new housing development over the 2001 to 2016 period (at 82% of Census housing growth). Over the next 30 years, it is anticipated that housing development within the County will be increasingly concentrated in medium- and high-density forms, largely driven by needs related to housing affordability and the aging of the County's population base.

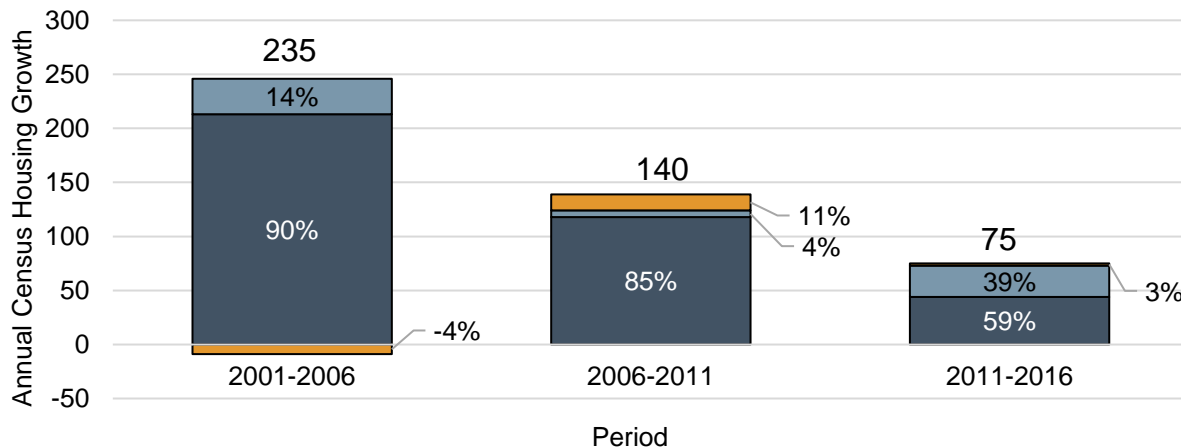
Figure 3-9
County of Brant
Historical Number of Households, 2001 to 2016



Low density includes single detached and semi-detached units.
Medium density includes townhouses and apartments in duplexes.
High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Census, 2001 to 2016, by Watson & Associates Economists Ltd.



Figure 3-10
County of Brant
Historical Share of Annual Housing Growth by Type, 2001 to 2016



■ Low Density ■ Medium Density ■ High Density

Low density includes single detached and semi-detached units.

Medium density includes townhouses and apartments in duplexes.

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

Source: Derived from Statistics Canada Census, 2001 to 2016, by Watson & Associates Economists Ltd.

3.2.5 Housing Occupancy Trends within the County of Brant

3.2.5.1 Household Headship Rates

A household headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e., cohort). Between 2001 and 2016, the County of Brant's total headship rate increased modestly from 33.6% to 35.2% (refer to Appendix A for additional details). An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age, family type and family structure. 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. Accordingly, forecast trends in population age structure provide important insights into



future headship rates and average P.P.U. trends for the County of Brant, which is further discussed below. It is important to note that headship rates by major age group are anticipated to remain relatively stable over the long-term forecast period.

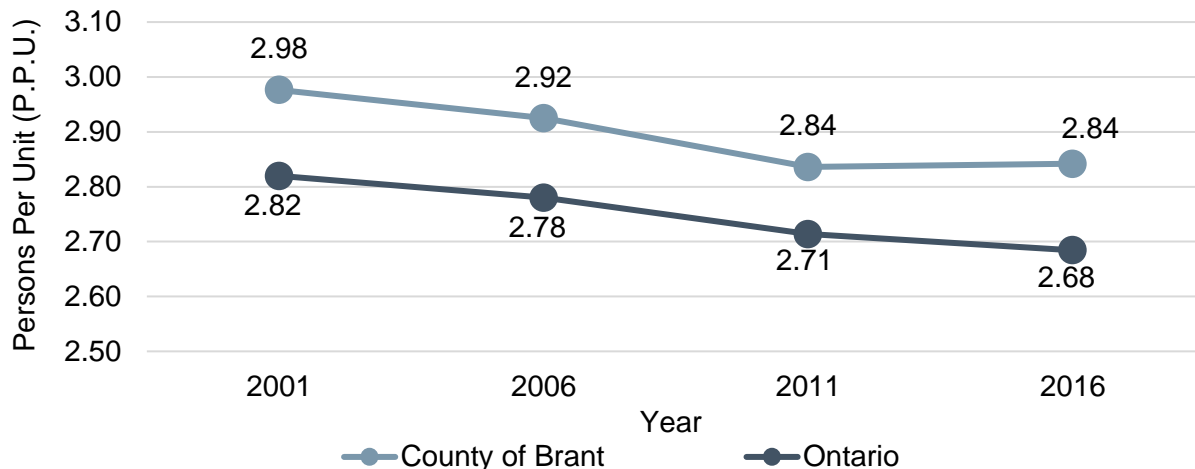
3.2.5.2 *Persons Per Housing Unit (P.P.U.)*

Figure 3-11 summarizes trends in average housing occupancy for the County of Brant and the Province of Ontario over the 2001 to 2016 period, expressed as the average number of P.P.U. Trends in household occupancy and age structure are a particularly important statistic for land-use planners, as these trends have broad implications for the amount and type of future housing needs associated with population growth as well as demands for public infrastructure, municipal services and schools. Key observations include the following:

- Average housing occupancy levels for the Province as a whole were lower relative to the County of Brant;
- The average P.P.U. for the County of Brant steadily declined over the 2001 to 2016 period, however, from 2011 to 2016, the County's average P.P.U. stabilized at 2.84. In contrast to the County of Brant, the average P.P.U. for the Province decline between 2011 and 2016;
- The recent trend toward greater stabilization in average household occupancy within the County of Brant is largely believed to be a result of increased residential development activity in the County, particularly new homes geared to families. It is further noted that potential delays in adult children leaving home, largely due to rising housing ownership and housing rental costs, are estimated to have caused upward pressure on average P.P.U. during the 2016 to 2021 period. Lastly, an increase in multi-family (i.e., multi-generational) dwellings is also believed to be driving this trend. These trends have also been observed across many other G.G.H municipalities, most notably the more populated, urbanized municipalities within the G.T.H.A.; and
- The average P.P.U. for the County of Brant is forecast to continue to decline over the longer term. This decline, however, is anticipated to occur at a much slower rate relative to historical trends, primarily as a result of strong net migration associated with young adults anticipated over the forecast period (particularly over the next 10 to 15 years).



Figure 3-11
County of Brant
Historical Persons Per Unit (P.P.U.) Trends, 2001 to 2016



Note: Population used to calculate persons per unit includes the net Census undercount.
Source: Derived from Statistics Canada Census and Annual Demographics Estimates, 2001 to 2016, by Watson & Associates Economists Ltd.

3.2.5.3 Housing Propensity by Age Structure

Figure 3-12 summarizes historical housing propensity (i.e., demand) trends by structure type for Census households (private dwellings occupied by usual residents) in the County of Brant based on 2016 Statistics Canada Census data (additional details regarding forecast age-specific housing propensity as of 2051 are provided in Appendix B). Age-specific propensities measure housing demand by dwelling structure type, by age of household maintainer.

The socio-economic characteristics of the County's population related to income/affordability, lifestyle, family size, lifestyle decisions, health and mobility vary by population age, which in turn, influences the demand for housing by structure type. As illustrated in Figure 3-10, propensities for low-density housing (single detached and semi-detached) are high among all age groups, particularly over the age of 25. Propensities for high-density housing (apartments) are highest among the under 25 age group at 23%, followed by the over 23-34 and 75+ age groups.

As previously mentioned, the County of Brant's population is aging and the 55+ age group has grown considerably over the past 15 years. Looking forward, the percentage of seniors, particularly the 75+ age group, within the County of Brant is expected to



increase in both percentage and absolute terms over the next several decades. As the average age of the County of Brant's population continues to increase, it is anticipated that the demand for higher-density housing forms will also continue to steadily increase.

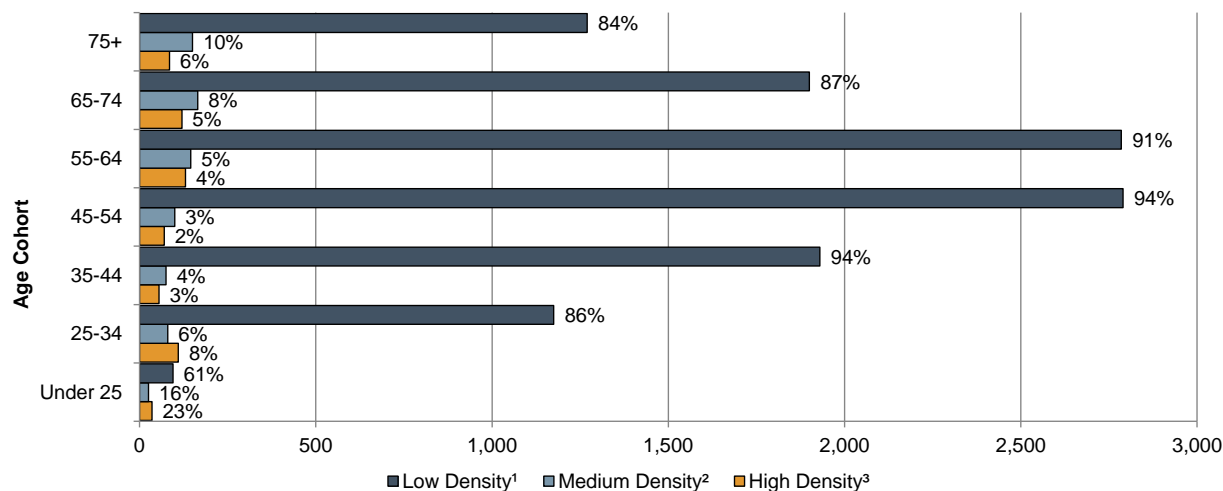
Within the 55+ age group, housing demand related to the 55-74 age group is anticipated to be relatively stronger for ground-oriented housing forms (i.e., single detached, semi-detached and townhouses) that provide proximity to urban amenities, municipal services and community infrastructure. With respect to the 75+ age group, the physical and socio-economic characteristics of this age group (on average) are considerably different than those of younger seniors, empty nesters and working adults with respect to income, mobility, and health. Typically, these socio-economic and physical characteristics represent a key driver behind the higher propensity from this age group for medium- and high-density housing forms (including seniors' housing) that are in proximity to urban amenities, health care services and other community facilities.

It is important to note that the growth in high-density housing presented in this section relates to private dwellings occupied by usual residents and does not include the population living in collective dwellings. Over the next 30 years, the rate of population growth associated with collective dwellings is anticipated to steadily increase relative to historical trends largely due to demand from the 75+ age group. The 75+ age group is anticipated to represent the fastest growing age group across the County of Brant, placing demands on accommodations such as seniors' housing (including nursing homes, assisted living, and long-term care homes), which in many cases are not categorized by Statistics Canada as private dwellings occupied by usual residents.

The County of Brant is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Accordingly, opportunities should be explored to provide a mix of future housing across a range of density types to accommodate those with varying levels of income (including affordable housing options) within the D.G.A. as well as in the B.U.A. across the County.



Figure 3-12
County of Brant
Propensity by Structure Type, 2016



¹ Includes singles and semi-detached units.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: Data from Statistics Canada 2016 Census by Watson & Associates Economists Ltd.

The housing propensity analysis, summarized above in Figure 3-12, does not provide insight with respect to housing demand by structure during the post-2016 period. As such, it is recognized that this data represents one historical information source in developing long-term assumptions regarding forecast housing growth by structure type, but it should also be supported by a thorough review of more recent and forward-looking data sources, which are discussed below.

Considering trends in housing demand by structure type over the past 10 years, it is observed that the housing market is already transitioning from low-density units to an increasingly higher share of medium-density units. As further noted in Figure 3-14, during the 2016 to 2020 period, 28% of residential building permits issued within the County of Brant were for medium- and high-density households. Comparatively, between 2011 and 2015, 25% of new residential building permits issued in the County of Brant were for medium- and high-density dwellings.

It is noted that an extrapolation of constant 2016 housing propensity rates by population age group may not generate an accurate near-term or longer-term forecast of housing demand by structure type. As such, consideration should be given to both historical trends and anticipated changes in housing propensity rates by population age group



when considering long-term housing demand by structure type. Figure 3-13 summarizes recent building permit data from 2016 to 2020 compared to the housing mix by structure type, as derived from the housing propensity analysis, using fixed propensity rates as per Statistics Canada 2016 Census data. Over the 2016 to 2020 forecast period, the fixed rate housing propensity analysis approach delivers a projection of 14% new households in the form of medium- and high-density units. In contrast, actual 2016 to 2020 residential building permit activity (new units only) indicates that the share of total units issued for medium- and high-density units was approximately double (28%), with a much stronger emphasis on demand for medium-density housing.

Figure 3-13
County of Brant
Housing Propensity Analysis by Structure Type, 2016 to 2021 vs. Residential Building Permit Data, 2016 to 2020

Housing Type	Total			Share		
	2016-2021 Propensity Forecast	2016-2020 Building Permits	Difference	2016-2021 Propensity Forecast	2016-2020 Building Permits	Difference
Low Density	1,040	1,210	-170	87%	72%	-15%
Medium Density	90	400	-310	8%	24%	16%
High Density	70	70	0	6%	4%	-2%
Total	1,196	1,680	-484	100%	100%	0%

Note: Figures have been rounded. An adjustment factor has been applied between building permit issuance and occupancy in the propensity forecast, taking into account Census housing growth vs. building permit issuance. This is largely as a result of the significantly higher rate of building permit growth between 2018 and 2021 for units which are not expected to be occupied by the 2021 Census.

Propensity forecast is based on 2016 propensity rates by age group and housing structure type.

Multiple dwellings include rows and apartments in duplexes.

Apartments include bachelor, 1 and 2+ bedroom rental and condo apartments.

Source: Watson & Associates Economists Ltd.

Comparing actual residential building permit activity between 2016 and 2020 in the County of Brant to the near-term (2016 to 2021) housing forecast by structure type using a fixed propensity rate analysis (in this case based on 2016 Census data), highlights the limitations of this approach when projecting forecast housing by structure type. Looking forward over the next decade and beyond, it is anticipated that the share of medium- and high-density housing activity will steadily increase. It is noted that 35% of housing units in the development approvals process are medium and high density, which is further discussed in section 3.2.9. The results of the 2021 Census will also be helpful in further understanding recent trends in housing propensity by age.



A housing propensity analysis by population age and housing structure type represents a useful starting approach in developing long-term assumptions regarding forecast housing growth by structure type. In addition to population age structure, however, there are a number of factors such as household income, housing demand by tenure (i.e., rental vs. ownership housing), housing affordability, lifestyle decisions, health, mobility, and planning policy, which also influence the built form and type of housing units constructed across the County of Brant. While the influence of these other socio-economic variables on the Region's future housing needs by structure type can be explored and tested to varying degrees, these impacts cannot be easily isolated when assessing the County's future housing needs.

In addition to exploring a housing propensity analysis using baseline Census data, it is recommended that forecast housing propensity rates and corresponding housing demand by structure type are annually monitored using a range of data sources. Such data sources should include, but would not be limited to, recent residential building permit activity/housing completions, active residential development applications, postcensal migration trends, trends in housing demand by tenure, trends in housing affordability, impacts of major infrastructure investments as well as planning policy and economic development initiatives.

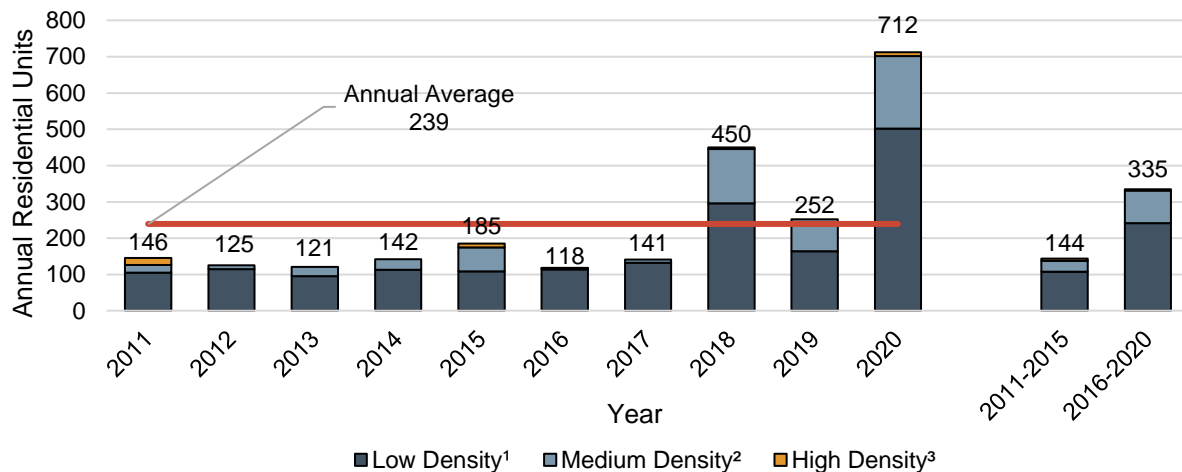
3.2.6 Housing Development Trends

Figure 3-14 summarizes total residential building permits by structure type from 2011 to 2020 for the County of Brant. Key observations include:

- The number of units from residential building permits (new units only) issued for the County of Brant between 2011 and 2020 averaged 239 units per year;
- The average number of units from residential building permits increased from 2015, averaging 335 units annually over the 2016 to 2020 period; and
- The average number of units from building permits issued for medium-density housing units increased over the past three years, representing nearly one-third of all units from residential permits issued.



Figure 3-14
County of Brant
Residential Building Permit Activity by Housing Type (New Units Only),
2011 to 2020



¹ Includes singles and semi-detached units.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: 2011 to 2018 and 2020 historical building permit data provided by the County of Brant, and 2019 from Statistics Canada, by Watson & Associates Economists Ltd.

3.2.6.1 Supply of Potential Housing Units on Vacant Lands

The County's active development application data was reviewed to provide insight into the demand for residential housing units by structure and timing of development. Figure 3-15 provides a summary of potential residential development on vacant lands within the County of Brant. The County's potential housing supply includes potential housing development that is approved/draft approved (registered unbuilt/draft approved), development that is under review or proposed, and remaining vacant lands with no applications. Throughout the County, low-density housing comprises a large share of the housing potential, at approximately 65%, followed by medium-density housing at 13% and high-density housing at 22%.

With respect to housing potential that is approved and within active applications (draft approved and proposed), which provides an indication of shorter-term housing demand, the County has a supply total of approximately 9,108 housing units. Of these, approximately 65% is low density, followed by medium density at 13%, and high density



at 22%. Housing potential within active development applications suggest a trend towards a wider range of housing types compared to historical trends.

Figure 3-15
County of Brant
Housing Potential on Vacant Lands by Status as of Year-End 2020

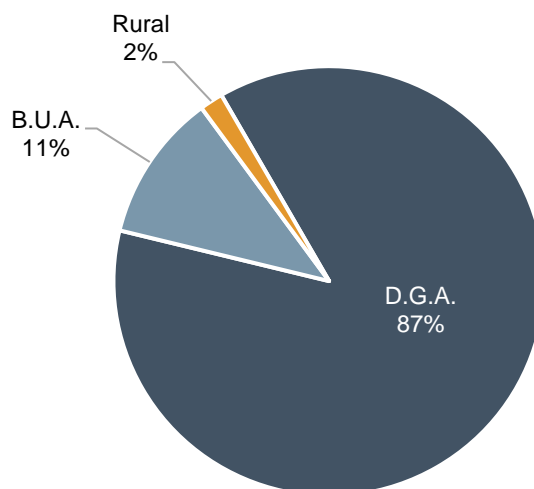
Stage of Development	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units	Total Housing Unit Share
Registered Unbuilt	1,230	534	770	2,434	26%
Draft Approved	3,036	606	1,009	4,651	48%
Proposed	1,619	83	221	1,923	20%
Sub-Total	5,885	1,223	2,000	9,108	94%
Share (%)	65%	13%	22%	100%	
Other Vacant Designated Lands (no application)	468	0	144	612	6%
Total	6,353	1,223	2,114	9,720	100%
Share (%)	65%	13%	22%	100%	

Source: Based on County of Brant data as of December 2020.

Figure 3-16 provides a summary of housing potential on vacant lands by policy area (B.U.A., D.G.A. and Rural Area). As summarized, the majority (87%) of future housing supply potential is within the D.G.A. The B.U.A. represents approximately 11% of the housing unit potential, comprising 43% low density, followed by high density at 32% and medium density at 25%. The Rural Area is estimated to comprise 2% of the housing potential within the County, or approximately 170 potential dwelling units. It is important to note that the housing potential within the Rural Area excludes a review of severance potential. Further details regarding housing potential by Urban Settlement Area and Rural System is provided in Chapter 4, Population and Housing Allocations to 2051.



Figure 3-16
County of Brant
Housing Potential on Vacant Lands by Policy Area,
Year-End 2020



Source: Based on County of Brant data as of December 2020, by Watson & Associates Economists Ltd.

3.2.6.2 Trends in County of Brant and Comparator G.G.H. Municipalities' Housing Prices, 2010 to 2020

Economic conditions and housing prices play key roles in shaping housing development trends. Over the past two decades, the G.G.H. has experienced a steady increase in housing prices driven by a number of factors including rising land prices, steady immigration, and strong population growth, as well as a robust employment market. Generally, strong fundamentals associated with the Canadian economy have also attracted a steady stream of local and foreign investment to the G.G.H. real estate market. The current low interest rate environment has also enabled the appreciation of residential real estate values, as buyers have benefitted from access to low interest rate mortgages. Most recently, the coronavirus disease (COVID-19) pandemic has accelerated housing price appreciation since mid-2020, most notably in the Province's smaller urban communities and rural areas.

Figure 3-17 summarizes historical trends in average housing sale prices for the County of Brant and several G.G.H. municipalities for single detached dwelling units between 2010 and 2020. Housing price data for townhouses and condominiums is also provided for 2020, where available. Across the G.G.H., housing prices for new single detached units vary considerably, with average prices highest in the G.T.H.A. municipalities of



Mississauga, Burlington, and Oakville. Comparatively, the average price of a single detached house is significantly lower in the City of Hamilton within the G.T.H.A. context. Average housing prices for new single detached houses within the County of Brant fall in the bottom half of the range relative to the comparator municipalities. With respect to housing appreciation for new single detached units, Burlington and Mississauga have experienced the strongest average annual growth rate over the past 10 years, with the municipalities of Milton, Guelph, Cambridge, and Brantford following in this regard. The County of Brant has experienced a relatively low rate of annual housing price appreciation for new single detached units over the last decade. As previously noted, however, recent housing price appreciation in the County of Brant has significantly accelerated across all housing types over the past year (refer to section 3.3.2 for further details).



Figure 3-17
G.G.H.
Historical Trends in Housing Prices

Municipality	New Single Detached Price, 2010	New Single Detached Price, 2020	Townhouse Price, 2020	Condominium Price, 2020	Annual Increase in New Single Detached Housing Unit, 2010-2020
City of Burlington	\$602,800	\$2,297,800	\$760,500	\$521,400	14%
City of Mississauga	\$784,400	\$2,780,400	\$833,700	\$533,800	13%
Town of Milton	\$441,100	\$1,078,200	\$731,100	\$523,500	9%
City of Guelph	\$372,700	\$907,900	\$447,300	\$369,100	9%
City of Cambridge	\$338,200	\$774,900	\$425,500	\$503,200	9%
City of Brantford	\$285,200	\$645,300	\$330,400 ¹	\$275,800 ¹	9%
Town of Oakville	\$958,700	\$2,143,700	\$915,200	\$646,000	8%
Town of Caledon	\$561,000	\$1,092,400	\$753,000	-	7%
City of Kitchener	\$388,700	\$751,300	\$416,100	\$314,900	7%
City of Waterloo	\$468,700	\$870,900			6%
City of Brampton	\$483,200	\$868,300	\$721,600	\$461,500	6%
City of Hamilton	\$422,700	\$636,200	-	-	4%
County of Brant	\$538,500	\$675,500	\$330,400 ¹	\$275,800 ¹	2%

¹ County of Brant and City of Brantford townhouse and condominium price data is the same and from the Brantford Regional Real Estate Association. Data includes the rural areas and communities in Brant County, which includes the City of Brantford; and urban areas of Paris, Burford, Mount Pleasant, Oakland, Scotland and St. George.

Source: Watson & Associates Economists Ltd. Data for average single detached prices based on the average price of new single detached units derived from Canada Mortgage Housing Corporation (CMHC), Housing Market Absorption Survey. Townhouse and condominium prices for the City of Guelph, City of Cambridge, City of Kitchener, City of Waterloo, County of Brant and City of Brantford derived from Canadian Real Estate Association MLS HPI data. Townhouse and condominium prices for the City of Burlington, Town of Milton, Town of Oakville, City of Mississauga, City of Brampton, and Town of Caledon derived from TREB Market Watch reports.

3.2.6.3 Average Household Income

Figure 3-18 summarizes average household income growth for the County of Brant and the Province of Ontario between 2000 and 2015. Key observations are as follows:

- As of 2015, the estimated average household income in the County of Brant was \$105,100, which is higher compared to the average household income for the Province of Ontario; and



- The annual rate of household income growth for the County of Brant has decreased over the past five years relative to the previous ten years. Overall household income growth over the past 15 years in the County has been higher relative to the Province of Ontario.

Figure 3-18
County of Brant and Province of Ontario
Average Household Income, 2001 to 2016 Census Years

Census Year	County of Brant Average Household Income	Province of Ontario Average Household Income
2001	\$67,600	\$66,800
2006	\$79,900	\$78,000
2011	\$94,500	\$85,800
2016	\$105,100	\$97,900
Census Year	County of Brant Average Household Income Annual Growth	Province of Ontario Average Household Income Annual Growth
2001-2006	\$2,450	\$2,240
2006-2011	\$2,920	\$1,560
2011-2016	\$2,110	\$2,420
Census Year	County of Brant Average Household Income Annual Growth Rate	Province of Ontario Average Household Income Annual Growth Rate
2001-2006	3.4%	3.1%
2006-2011	3.4%	1.9%
2011-2016	2.1%	2.7%

Note: Census year income shown is for previous year (e.g., 2001 to 2016 is 2000 to 2015 income).

Source: 2001 to 2016 data derived from Statistics Canada Census and NHS by Watson & Associates Economists Ltd.

Average household income growth has not kept pace with rising housing prices. As a result, housing affordability has been steadily eroded over the past decade across the G.G.H., most notably within the larger urban centres of the G.T.H.A. There is a need to ensure that sufficient opportunities exist within the County of Brant (and across the G.G.H. in general) to accommodate a broad range of housing types (i.e., ground



oriented and high density) for all household income levels, including market, affordable, assisted and emergency housing.^{1, 2, 3}

3.3 County of Brant Population and Housing Forecast to 2051

3.3.1 Population and Employment Growth Outlook for the Greater Golden Horseshoe, 2016 to 2051

A key driver of the County of Brant's future economic potential is its geographic location within Ontario. The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of approximately 5.3 million people (153,000 annually), or 1.3% annually between 2016 and 2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase from 4.6 million in 2016 to 7.0 million in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051.

The G.G.H. represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The industrial and office commercial real estate markets within the G.G.H. 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 G.G.H. is highly attractive to new businesses and investors on an international level. The G.G.H. 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 United States (U.S.) border. In turn, this continues to support steady population and

¹ Affordable housing as defined in the P.P.S., 2020, p. 39.

² Assisted housing refers to housing that is available to low- and moderate-income households for rent or purchase where part of the housing cost is subsidized through a government program.

³ Emergency housing refers to shelters, supportive housing, transitional housing, etc.



housing growth within this region, largely driven by international and inter-provincial net migration to the area.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. As illustrated in Figure 3-19, due to its geographic location within the western region of the G.G.H. Outer Ring, Brant County is forecast to experience significant outward growth pressure over the next several decades largely from G.T.H.A. municipalities in the west and north, which have historically been amongst the fastest growing municipalities in Ontario in recent decades.

Figure 3-19
G.G.H.
County of Brant within the Context of the G.G.H.

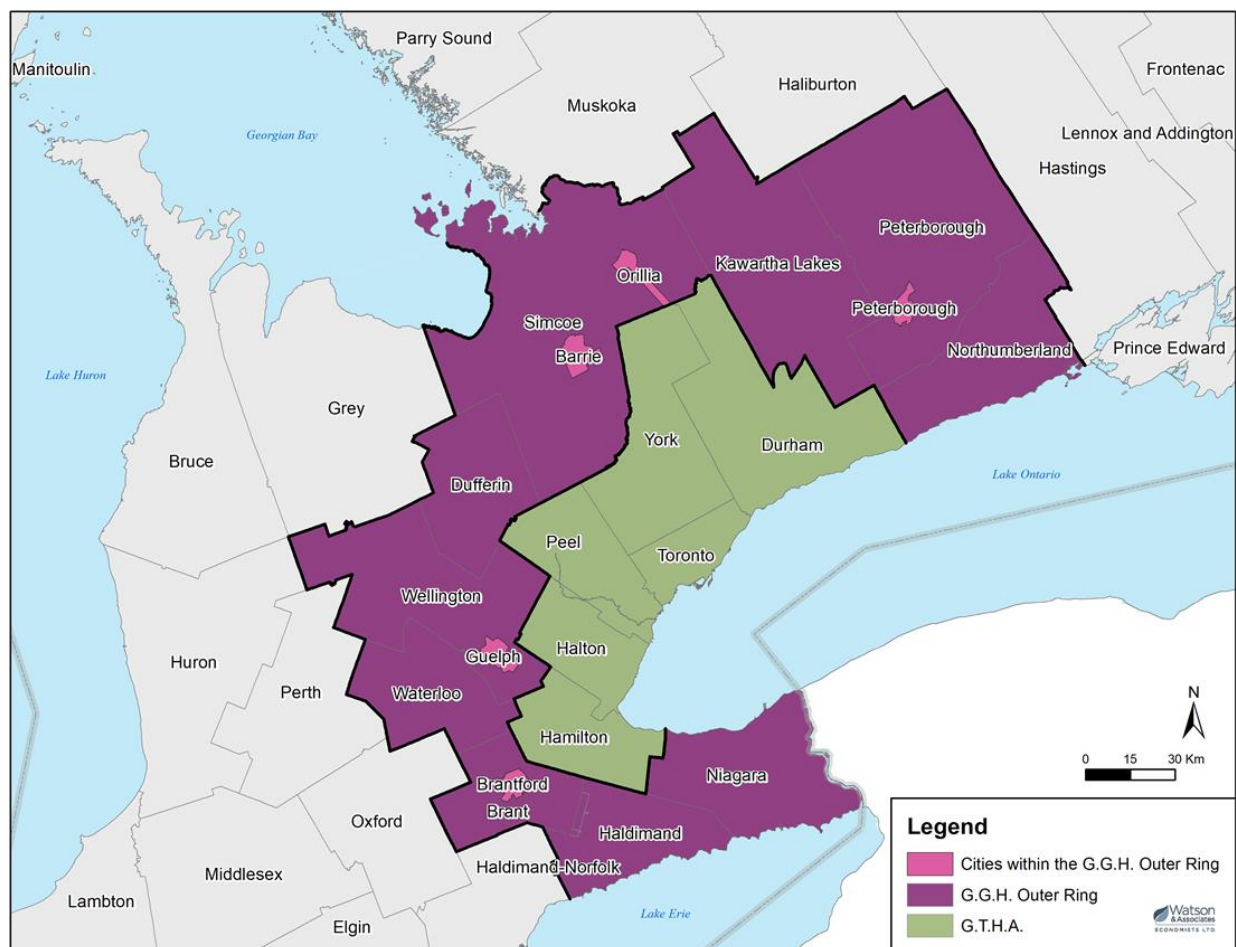


Figure 3-20 through to Figure 3-22 summarize the historical and long-term population employment growth forecast for the G.G.H. between the G.T.H.A. and the G.G.H. Outer



Ring. Figure 3-20 and Figure 3-21 identify that the G.T.H.A. has historically experienced a higher rate of population and employment relative to the G.G.H. Outer Ring over the 2001 to 2016 period. Looking forward, forecast annual population and the employment growth rate of the G.G.H. Outer Ring are anticipated to increase significantly, driven by continued outward growth pressure from the G.T.H.A. and steady net migration. In fact, the forecast annual rate of employment growth in the G.G.H. Outer Ring is expected to exceed that of the G.T.H.A. between 2016 and 2051.

Figure 3-20
G.G.H.
Historical and Forecast Population Growth
2001 to 2051

Area	2001 Population	2016 Population	2051 Population	2001 to 2016 Total Population Growth	2001 to 2016 Annual Population Growth Rate	2016 to 2051 Total Population Growth	2016 to 2051 Annual Population Growth Rate
G.T.H.A.	5,808,000	7,183,000	11,172,000	1,375,000	1.4%	3,989,000	1.3%
G.G.H. Outer Ring	2,046,000	2,355,000	3,703,000	309,000	0.9%	1,348,000	1.3%
Total G.G.H.	7,854,000	9,538,000	14,875,000	1,684,000	1.3%	5,337,000	1.3%

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. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.

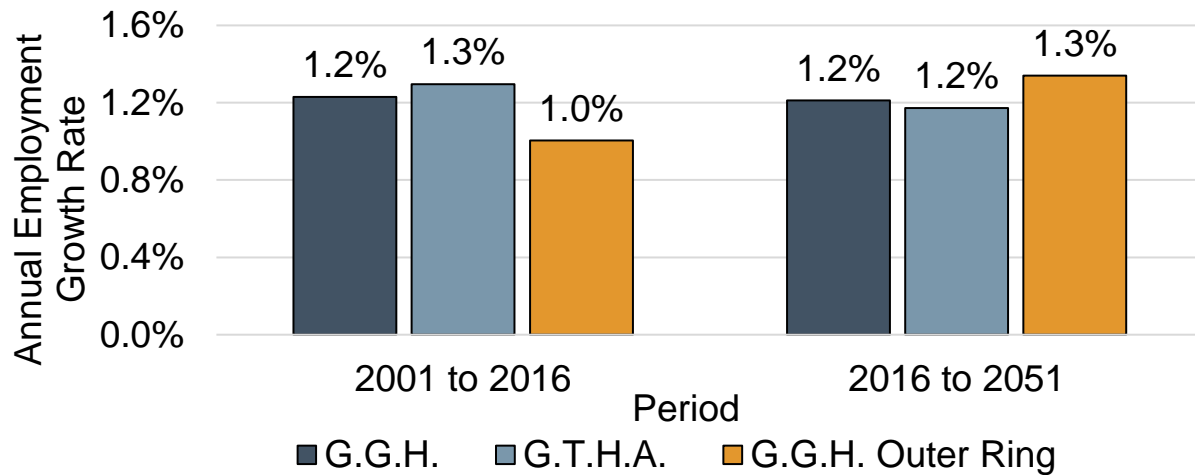
Figure 3-21
G.G.H.
Historical and Forecast Employment Growth
2001 to 2051

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

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. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.



Figure 3-22
G.G.H.
Historical and Forecast Annual Employment Growth Rate
2001 to 2051



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. Ontario.ca/growth planning. Derived by Watson & Associates Economists Ltd.

3.3.2 Near-Term Impacts of COVID-19 on Population Growth and Longer-Term Impacts on the Economy and the Real Estate Market in the County of Brant

Since being declared a pandemic by the World Health Organization (W.H.O.) on March 12, 2020, the economic impacts of COVID-19 on global economic output have been significant. Economic sectors such as travel and tourism, accommodation and food, manufacturing, and energy have been hit particularly hard. On the other hand, many other employment sectors (particularly knowledge-based sectors), which are more adaptable to the current remote work environment, have been less negatively impacted and in some cases have prospered.

Canada's gross domestic product (G.D.P.) annualized growth rate declined by approximately 39% in the second quarter of 2020 (April to June) due to COVID-19. As restrictions gradually loosened during that period, beginning in May 2020, businesses



came out of lockdown during the summer months and economic activity grew at a pace of 40.6% in the third quarter, although G.D.P. was still short of pre-pandemic levels.^{1, 2}

Economic growth continued through to the fourth quarter of 2020 at an annualized rate of 9.6% despite increased COVID-19 restrictions towards the end of November 2020. Despite this fourth quarter increase, real G.D.P. in 2020 declined overall by 5.4%.³ Heading into 2021, Canada's economy grew sharply by 5.6% in the first quarter, but due to the impacts of the third COVID-19 wave in April 2021, the Province-wide lockdown has weighed on economic activity in the second quarter of 2021. Given the strong performance leading up to April 2021, it is expected that any setbacks due to the lockdown will be quickly recouped once restrictions ease.^{4, 5}

Overall, required modifications to social behavior (e.g., 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, continued tensions, logistical challenges and constraints related to international trade have also begun to raise further questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

At present, the level of sustained economic impact related to this “exogenous shock” to the world and the Canadian economy is still relatively uncertain. While the prospects for a global recovery have improved in recent months, the pace of this global economic recovery has been uneven, largely due to the rate at which countries have been able to vaccinate their residents.⁶

Despite the near-term consequences of COVID-19, particularly related to immigration as well as businesses in the retail, travel and tourism sector, the long-term economic and housing outlook for the G.G.H. remains positive as the region continues to be

¹ Reuters Business News, August 28, 2020.

² CBC Business News, 2020 was the worst year on record for Canada's economy. It shrank by 5.4%, March 2, 2021.

³ Ibid.

⁴ Ontario Newsroom, Office of the Premier, Ontario Declares Second Provincial Emergency to Address COVID-19 Crisis and Save Lives, January 12, 2021.

⁵ Financial Post, Canada's economy posts 5.6% annualized growth in Q1, June 1, 2021.

⁶ Global Government Forum. OECD Warns of Uneven Economic Recovery from COVID-19, Despite Global Growth. June 1, 2021.



attractive to international investment and newcomers alike. While the housing market across the G.G.H. experienced a slow start in early 2020 due to COVID-19, pent-up demand and historically low mortgage rates have accelerated housing demand across the G.G.H., particularly in the Outer Ring, with record sales and higher average selling prices. Since the beginning of the COVID-19 pandemic in early 2020, outward growth pressure from the G.T.H.A. to the G.G.H. Outer Ring has accelerated. According to the Brantford Regional Real Estate Association (B.R.E.A.A.), the average selling price across the Brant County Region in 2020 was \$591,600, up by approximately 32% from 2019, and prices have continued to increase reaching a high of \$718,800 in February 2021. Housing sales are also up by nearly 12% in 2020 compared to 2019, with continued strong sales in early 2020.^{1, 2}

Notwithstanding the recent positive real estate trends identified for the G.G.H. as a whole, the G.G.H. Outer Ring, and the County of Brant, there are a number of factors to remain cautious about with respect to the broader demand for housing over the near term (i.e., the next one to three years). Reduced immigration levels in 2020 and expected lower levels in 2021 are anticipated to slow population growth to the G.G.H. and the County of Brant, potentially placing downward pressure on housing market demand if domestic demand slows (refer to section 3.3.3).³ Tighter mortgage rules could also temper the hot real-estate market as home buyers would face stiffer mortgage stress tests. The Governor of the Bank of Canada has warned that houses who have overextended on their mortgages are vulnerable to rising interest rates when they must be renewed, and not to expect the rapid price increase to continue indefinitely.⁴

These above-mentioned factors have the potential to reduce population growth levels and soften the housing market in areas of Ontario where population growth is most

¹ The B.R.E.A.A. represents the Brant County Region which includes the rural areas and communities in the Brant County Census Division. This includes the City of Brantford; and urban areas of Paris, Burford, Mount Pleasant, Oakland, Scotland and St. George.

² Brantford Regional Real Estate Association, 2020 and 2021 year-to-date February statistics.

³ “Very difficult” to meet Canada's immigration targets after pandemic drop: immigration lawyer. CTV News. January 14, 2021.

⁴ CTV Business News, Mortgage stress tests set to tighten in wake of Bank of Canada warnings, May 20, 2021.



heavily dependent on immigration. Among G.G.H. municipalities, the City of Toronto, Peel Region, and York Region could potentially be the most heavily impacted by such a trend, while the remaining “905” area of the G.T.H.A. and the G.G.H. Outer Ring, including the County of Brant, which is more dependent on inter-provincial and intra-provincial net migration as a source of housing demand, may potentially be less impacted.

In addition to its 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 taking place prior to the pandemic. Businesses 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. 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 to consider the manner in which these impacts are likely to influence the nature of employment by type, as well as by place of work. These factors are further discussed in Chapter 6.

As of 2016, approximately 13% of the County of Brant workforce is identified as working from home on a full-time basis. The percentage of workers who reported having no fixed place of work (N.F.P.O.W.) in 2016 was 14%.^{1,2} It is anticipated that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will steadily increase over the long term. As this percentage continues to steadily rise, it may reduce the relative need for future commercial and institutional building space associated with the employment forecasts set out in Schedule 3 of the Growth Plan.

¹ Work at home and N.F.P.O.W. employment derived from 2001 and 2016 Statistics Canada Census data.

² Statistics Canada defines N.F.P.O.W. employees as “persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”



3.3.3 Near-Term Immigration Levels for Canada are Likely to Remain Below Historical Averages Due to COVID-19

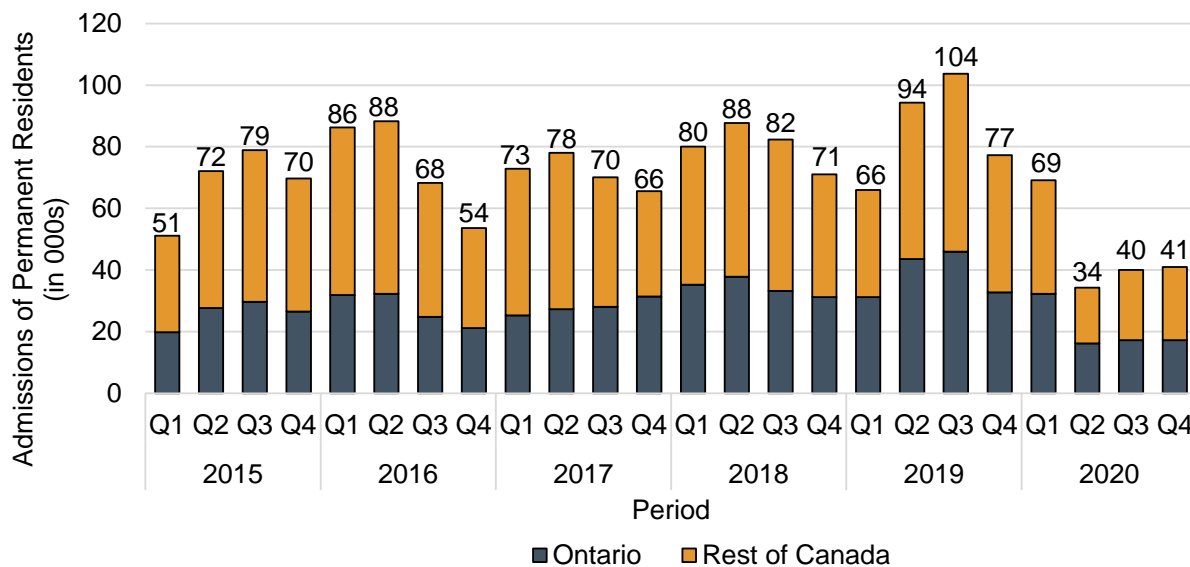
In October 2020, the Canadian federal government released its Immigration Levels Plan for the next three years. Canada has continued to raise the immigration targets and aims to welcome 401,000 new permanent residents in 2021, 411,000 in 2022, and 421,000 in 2023. This is an increase of 50,000 newcomers annually from the previous targets of 351,000 in 2021 and 361,000 in 2026. The increase in immigration targets will make up for the shortfall in 2020 and fill crucial labour market gaps to ensure Canada remains competitive on the world stage. With a focus on economic growth, 60% of admissions are to come from the economic class.¹

Figure 3-23 summarizes admissions to Canada and Ontario by quarter since 2015. Looking forward through 2021, immigration levels to Canada and Ontario are anticipated to remain low as a result of travel restrictions due to COVID-19. A recent report prepared by the Federal Department of Immigration, Refugees and Citizenship Canada (IRCC) indicates that when travel restrictions begin to ease, a significant surge of applications and support requirements is anticipated. Sustainable higher levels of immigration in line with the increased immigration targets, however, will be largely dictated by the on-going strength of the national and provincial economies.

¹ Immigration, Refugee and Citizenship Canada news release, October 20, 2020. <https://www.canada.ca/en/immigration-refugees-citizenship/news/2020/10/government-of-canada-announces-plan-to-support-economic-recovery-through-immigration.html>



Figure 3-23
Ontario and Canada
Quarterly Admission of Permanent Residents in Ontario Versus the Rest of Canada,
2015 to 2020



Source: Derived from IRCC, December 31, 2020, data, by Watson & Associates Economists Ltd.

3.3.4 Longer-Term Growth Drivers and Disruptors in the County of Brant

A number of regional and local growth drivers and disruptors have been identified which are anticipated to influence future population, housing and employment growth within the County of Brant over the 2016 to 2051 period. These drivers and disruptors are identified below.

3.3.4.1 Regional Infrastructure Assets

The County of Brant continues to have a strong appeal to both businesses and residents. This appeal is largely attributed to the County's geographic location directly outside the G.T.H.A. The County of Brant offers proximity and access to key regional infrastructure such as the Toronto Pearson International Airport, Highway 403, Hamilton Airport and Hamilton Port, which serves as Canada's major trade corridor and links major urban centres in Ontario and Quebec to the U.S. The County's highway and arterial road network also offers residents and businesses connectivity within the County as well as transportation access to surrounding employment markets. These



attributes make the County of Brant an attractive destination for permanent residents of all ages as well as small, mid-sized and large businesses.

3.3.4.2 Regional Economic Opportunities

As previously discussed in Chapter 2, the County of Brant is characterized by a blend of expansive rural lands and vibrant Urban Settlement Areas. The County's "small town" urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. For the County of Brant, COVID-19 has acted as a near-term driver of housing demand, 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 the County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in the County of Brant over the long term.

The existing employment base in the County of Brant is concentrated in a number of export-based and community-based employment sectors. The County's employment base is particularly concentrated in manufacturing, transportation and warehousing, construction, agriculture, retail and wholesale trade, and health care and social assistance. Many of these sectors are also anticipated to represent the fastest growing segments of the regional economy; however, it is also noted that a number of emerging knowledge-based sectors are also anticipated to experience steady employment growth over the next several decades. This is discussed further in Chapter 6.

Despite a relatively modest regional growth outlook for manufacturing employment, this sector continues to be a dominant component of the County's industry base. Looking forward, opportunities exist mainly for small to mid-sized firms that will benefit from the economic synergies offered between the County and the larger and growing employment markets within neighbouring areas such as the City of Brantford, Waterloo Region, and the west G.T.H.A.

The County's employment base is also highly concentrated in the creative class economy, including people engaged in arts and culture as artists, actors, performers, writers, and designers. Many of these jobs, as well as the occupations in the County's rural areas are oriented towards small businesses and home-based occupations. The



County is also rich in architectural heritage with numerous historic mills, barns, train stations, bridges, places of worship, and other buildings. The County offers a broad range of entertainment and dining options as well social events and festivals, which attract a growing number of people (both residents and visitors) to the County every year.

With 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 the productivity of the industry by providing value-added products and services, which in turn also helps drive the County's tourism sector. It is one of the key planning principles for the County of Brant to promote and protect the predominantly agricultural character and economy of the County by ensuring the continued viability of agricultural resource areas, the agricultural industry, and agricultural communities in the County. The agricultural 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, as well as other on-farm diversified uses.

The County of Brant has also experienced steady employment growth in the transportation and warehousing sector over the past decade. Rising industrial land prices are anticipated to continue to shift the concentration of land expansive industrial uses within this sector from the G.T.H.A. to outer regions of the G.G.H. and beyond, including the County of Brant. Future demand along the Highway 403 corridor in the County of Brant is anticipated in the logistics sector, driven by competitive development costs and the strategic location for these operations.

As the employment base continues to grow within the County and the surrounding commuter-shed, the economy is also anticipated to diversify generating a range of new live/work and commuting opportunities. As the local employment base and economy within the surrounding commuter-shed continues to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population growth across the County. Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated within neighbouring municipalities within the G.G.H. Outer Ring. Raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the



broader G.G.H. regional economy should represent a key long-term economic development strategy for the County of Brant.

3.3.4.3 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. Looking forward, these “soft” factors represent a key reason why the County’s relative competitive position is likely to strengthen over time, by attracting new residents and business development over the long term.

3.3.5 County of Brant Population Forecast to 2051

3.3.5.1 County of Brant Recommended Long-Term Growth Forecast

The long-term growth population and employment forecast for the County of Brant, as set out in Schedule 3 of the Growth Plan, 2019, has been comprehensively evaluated herein within the context of historical growth trends, the broader growth outlook for the G.G.H., and the influence of regional growth drivers on the share of G.G.H. growth allocated to the County of Brant. These factors are summarized below and used to further rationalize the Growth Plan, 2019 long-term population and employment growth for the County of Brant to the year 2051, as the recommended long-term growth scenario.

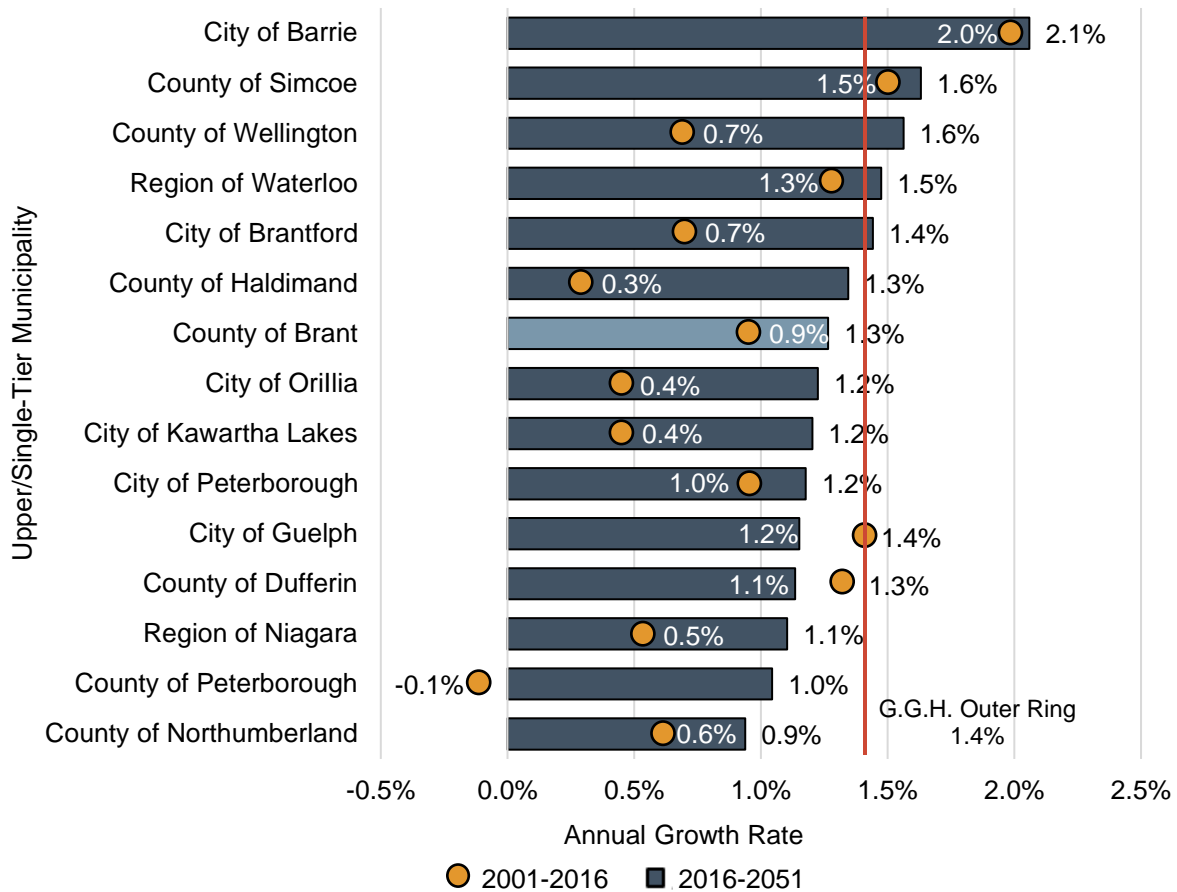
As illustrated in Figure 3-24 and Figure 3-25, the population and employment base for the County of Brant grew at an annual rate of 0.9% and 1.0%, respectively, between 2001 and 2016. Over the 2016 to 2051 forecast period, the rate of annual population and employment growth within the County of Brant is forecast to increase to 1.3% and 1.6%, respectively. Further details regarding the County’s long-term employment outlook are provided in Chapter 6.

Relative to the rate of population and employment growth for the G.G.H. Outer Ring, and more specifically the neighbouring municipalities to the County of Brant, the long-



term growth outlook for the County, as outlined in the Growth Plan, 2019, appears to be reasonable with the broader area and appropriate for the purposes of long-range planning.

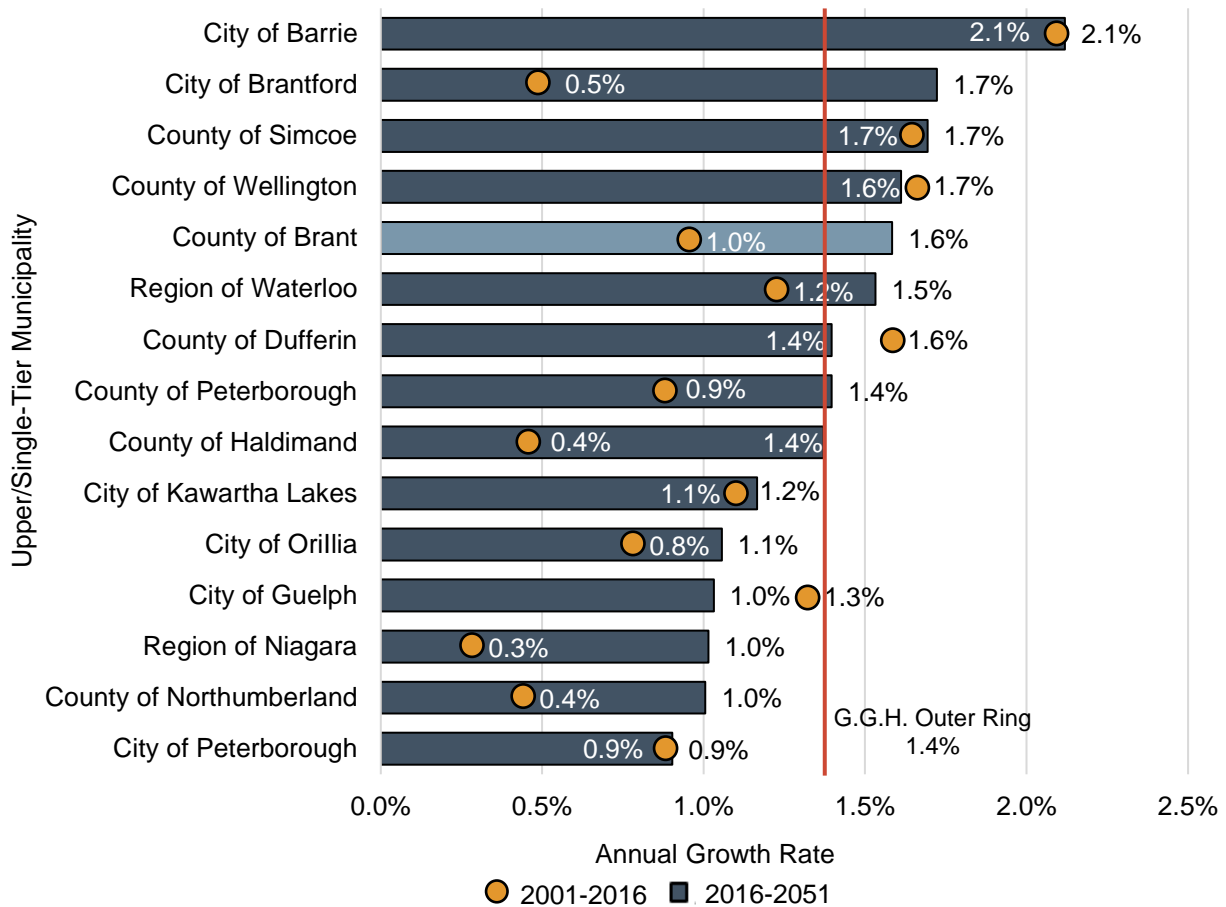
Figure 3-24
G.G.H. Outer Ring
Annual Population Growth Rate by Municipality, 2016 to 2051 (Schedule 3)



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.



Figure 3-25
G.G.H. Outer Ring
Annual Employment Growth Rate by Municipality, 2016 to 2051 (Schedule 3)

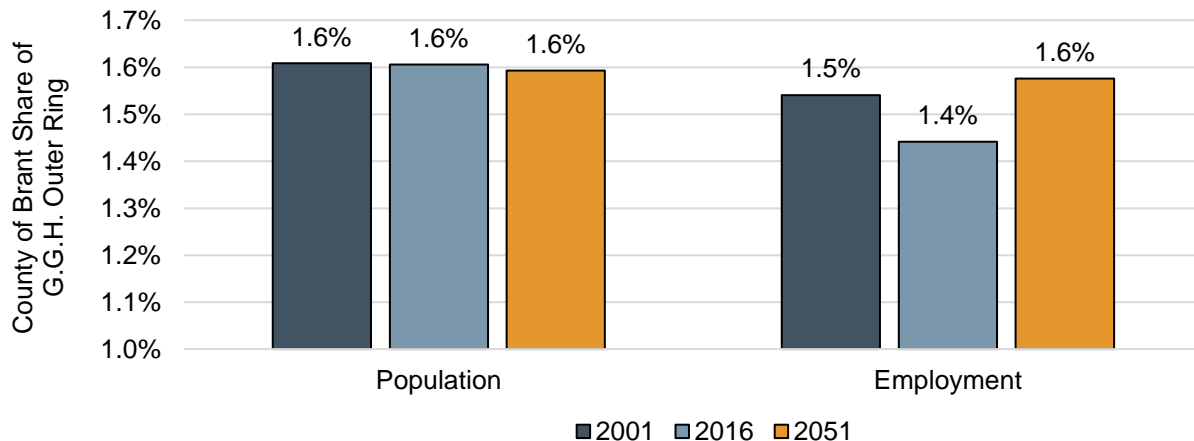


Source: Derived from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd., 2020.

As illustrated in Figure 3-26, the County of Brant has historically accommodated a steady share of G.G.H. Outer Ring population and a decreasing share of employment within the G.G.H. Outer Ring. Looking forward, the County of Brant’s population is forecast to grow at a comparable rate relative to the G.G.H. Outer Ring as a whole, while the rate of County-wide employment growth is forecast to outpace to G.G.H. average. As such, the share of total G.G.H. Outer Ring population within the County of Brant is forecast to remain stable and the share of employment is expected to increase over the long-term planning horizon.



Figure 3-26
G.G.H.
County of Brant Share of G.G.H. Outer Ring
Population and Employment, 2001 to 2051 (Schedule 3)



Source: 2001 to 2016 derived from Statistics Canada Census and Annual Demographic Estimates : Subprovincial Areas. 2051 from A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.

The Ontario Ministry of Finance (M.O.F.) population projections provide further insight into long-term population trends across Ontario and the G.G.H. In summary, recent population projection updates prepared by the M.O.F. continue to identify a shift in population growth across the G.G.H. from the G.T.H.A. to the G.G.H. Outer Ring. The most recent M.O.F. population projections (Spring 2021) identify that the impacts of COVID-19 have potentially accelerated this shift in population growth from the G.T.H.A. to the G.G.H. Outer Ring; however, these impacts are anticipated to return to their longer-term pre-pandemic trendline by 2022.

When considering long-term population growth scenarios for the County of Brant, it is important to monitor long-term provincial growth forecasts prepared by the Ministry of Municipal Affairs and Housing (M.M.A.H.) and the M.O.F. for the G.G.H. as well as its sub-regional areas. Over the near term, it is anticipated that population growth rates within the County of Brant will outpace the G.G.H. as a whole, which is supported by recent residential building permit activity experienced across the County over the past few years.¹ Over the longer-term, however, population growth rates are anticipated to

¹ Brant County Population, Household and Employment Forecast Update, 2011-2041. Final. May 5, 2015.



moderate due to the aging of the local/regional population, primarily driven by the aging of the Baby Boomers.

As the County's population continues to age, net migration will become an increasing source of population growth. The aging of the population is also anticipated to place downward pressure on labour force participation rates and ultimately labour force growth over the long term. As summarized in section 3.3.5.7, the level of annual net migration required to achieve the Growth Plan, 2019 population is significantly higher than historical trends achieved between 2001 and 2016. While it is reasonable to expect that forecast annual net migration levels in the County of Brant will be higher relative to historical trends, achieving even higher levels of net migration than what has been identified to generate the County's 2051 population forecast is not considered to be a likely long-term scenario.

Based on the review of the County's long-term growth outlook provided in this report, the 2051 population and employment forecast, as set out in Schedule 3 of the Growth Plan, 2019, is the recommended long-term growth scenario for the County of Brant. The Schedule 3 Growth Plan, 2019 forecast for Brant County:

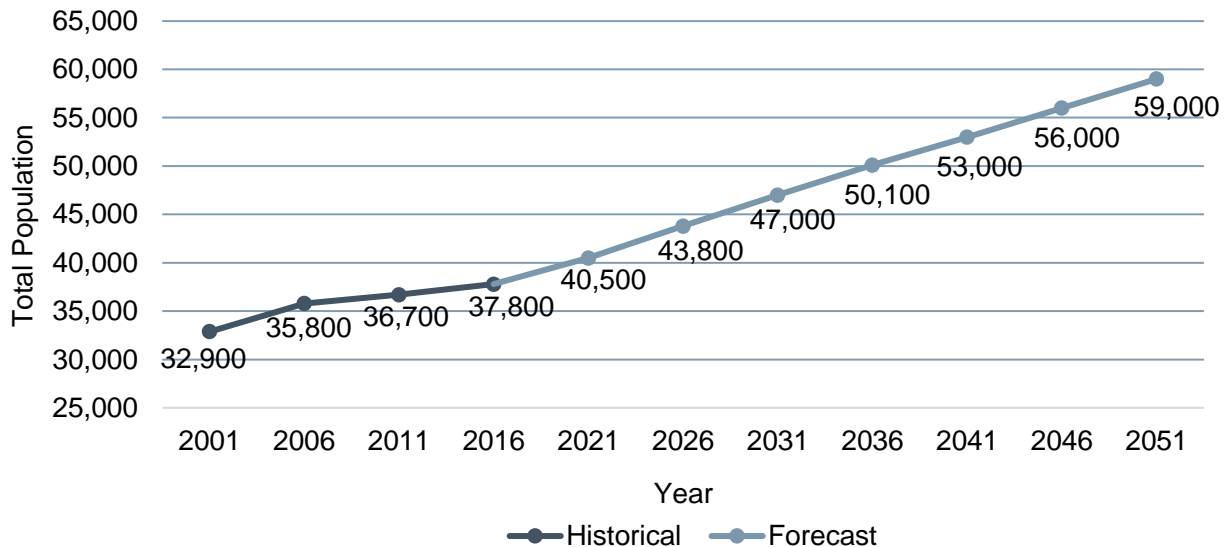
- Represents a reasonable increase in long-term population and employment growth relative to historical trends;
- Accurately identifies the anticipated influence of identified regional and local growth drivers on future development trends across the County; and
- Represents a reasonable change in the share of total population and employment in the County of Brant relative to the G.G.H. Outer Ring as a whole.

In accordance with the detailed review of the County's long-term population and employment growth outlook provided herein, a higher long-term population and employment forecast for the County of Brant is not supported for the purposes of long-term growth management and urban land needs analysis.

Figure 3-27 summarizes the County of Brant's total population growth forecast over the 2016 to 2051 period relative to historical population between 2001 and 2016. By 2051, the County of Brant's total population base is forecast to grow to approximately 59,000. This represents an increase of approximately 21,200 persons between 2016 and 2051, or an average annual population growth rate of 1.3% during this time period.



Figure 3-27
County of Brant
Population Growth Forecast to 2051



Note: Population includes net Census undercount.

Source: Historical data derived from Statistics Canada Census and Annual Demographic Estimates: Subprovincial Areas, 2001 to 2016. Forecast by Watson & Associates Economists Ltd.

3.3.5.2 Total Population Growth Forecast by Major Age Group

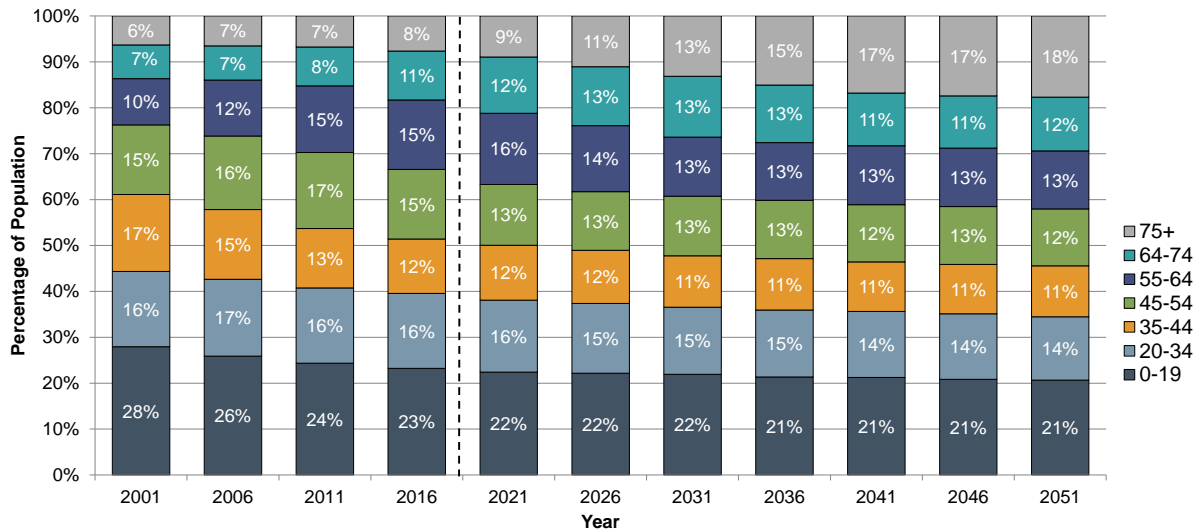
Figure 3-28 summarizes the total population growth forecast for the County of Brant by the percentage population by major age group. Additional details regarding the population forecast by age are provided in Appendix B. Key observations include:

- The percentage of the County of Brant's youth (0-19) is forecast to gradually decline from 23% in 2016 to 21% in 2051;
- The 20-34 age cohort (young adults), which comprised 16% of the population in 2016, is forecast to decrease in percentage share to 14% in 2051;
- The share of population in the 35-54 age group (adults) is forecast to decline from 27% to 23% over the same period;
- The percentage of empty nesters/younger seniors (age 55-74) is forecast to decline from 15% to 13%; and
- The percentage of population in the age 75+ age group (older seniors) is forecast to more than double from 8% in 2016 to 18% in 2051. As previously mentioned,



this is anticipated to place increasing demand on the need for seniors' housing, affordable housing, as well as community and social services.

Figure 3-28
County of Brant
Total Population by Major Age Group, 2016 to 2051



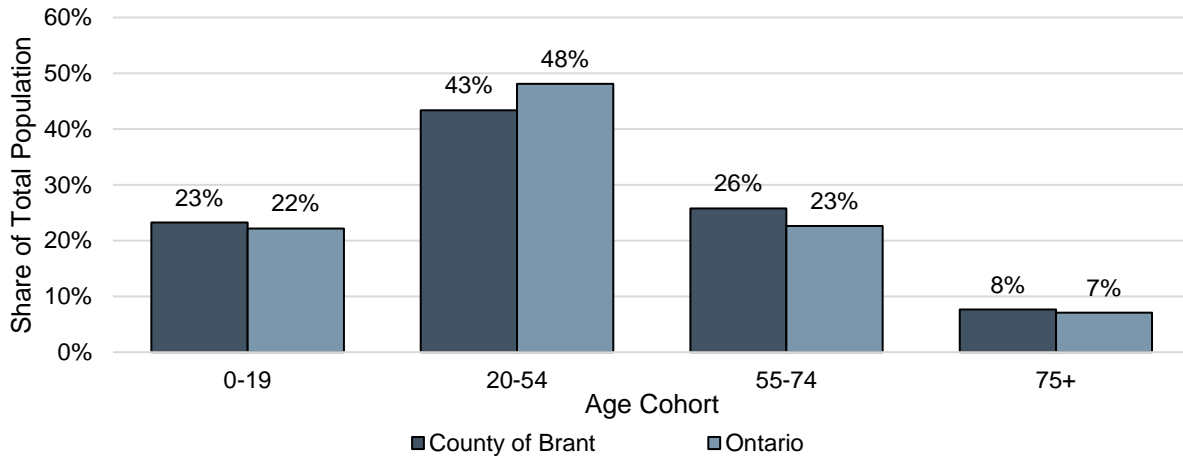
Note: Population includes net Census undercount.
 Source: Population forecast by age derived from 2001 to 2016 Statistics Canada Census and Annual Demographics Estimates data by Watson & Associates Economists Ltd. 2016 to 2051 population forecast by age prepared by Watson & Associates Economists Ltd.

3.3.5.3 County of Brant Population Comparison by Major Age Group

Figure 3-29 and Figure 3-30 summarize the 2016 and 2046 population age structure in the County of Brant compared to the Province of Ontario as a whole. Generally, the County of Brant's existing population is older than that of the Province of Ontario. By 2046, the County's population age structure is anticipated to continue to be older compared to the Province of Ontario.

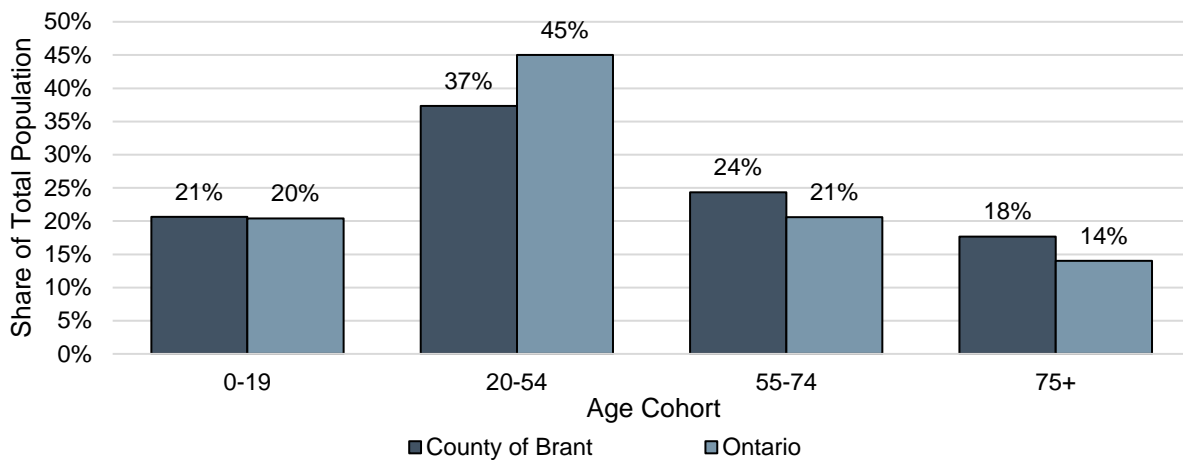


Figure 3-29
County of Brant and Ontario
Comparison of Population Age Structure, 2016



Note: Population used to calculate shares includes the net Census undercount.
Source: Ontario and City of Guelph derived from Statistics Canada Census and Table 17-10-0139-01 by Watson & Associates Economists Ltd.

Figure 3-30
County of Brant and Ontario
Comparison of Population Age Structure, 2046



Note: Population used to calculate shares includes the net Census undercount.
Source: Ontario derived from Ontario Ministry of Finance Population Projections, Summer 2020, and County of Brant by Watson & Associates Economists Ltd.



3.3.5.4 Planning for Existing and Future Generations within the County of Brant

As previously identified, forecast trends in population age structure are important to address as these demographic trends will directly influence the rate of future population growth as well future housing needs, infrastructure requirements and community services across the County of Brant. For most Canadian municipalities, including the County of Brant, the influence of key demographic groups such as Generation Z, Millennials, and Baby Boomers on the future of local real estate markets is particularly important to address. A brief summary of how these demographic groups are anticipated to shape future housing market demand across the County of Brant is provided below.

3.3.5.5 Addressing the Future Housing Needs of Millennials and Generation Z

Millennials are typically defined as the segment of the population that reached adulthood during the 2000s. While there is no standard age group associated with the Millennial generation, persons born between 1980 and 1992 (currently 29 to 41 years of age in 2021) best fit the definition of this age group. Millennials represent a large cohort in Canada, rivaling the Baby Boomer generation in terms of size and impacts on the real-estate market and labour force base. As of 2016, Millennials comprise approximately 15% of the County of Brant's population,¹ slightly lower than the Ontario provincial average of 17%. As of 2016, Millennials within the neighbouring G.G.H. municipalities (City of Guelph, City of Hamilton, Region of Waterloo, County of Dufferin, and Region of Halton) represent between 14% to 20% of their respective municipalities' population base.²

Home ownership is considered important for most Millennials. A recent Royal LePage study found that nearly half the Canadians aged 25-35 owned their home, and that 68% who currently are not homeowners planned to purchase a home in the next five years, with 72% being confident in their financial outlook. Nearly two-thirds of this age group who are employed or seeking employment feel the ability to work remotely for an employer is important, and approximately half said this has increased their likeliness to move further from their place of work. In total, nearly two in five are considering a move to a less dense area due to the COVID-19 pandemic, while approximately half said

¹ Statistics Canada, Census 2016, population by age.

² Ibid.



COVID-19 did not impact their desire to move into less dense areas. Given an option, 45% indicated they would prefer living in a city, while 47% said they would choose small town or country living. The most attractive features of living in a city were walkability (21%) and access to events, attractions and other entertainment options (21%), followed by diversity of people and cultures (18%), and more employment opportunities (17%). The top reasons for wanting to move to a less dense area included access to more outdoor space (62%) and lower home prices (61%), followed by the affordability of larger properties (51%).¹

Much of this demand for future home ownership appears to be the desire for additional floor space and a yard, in many cases to accommodate a growing family. Anticipated housing demand by the Millennial population is expected to drive future housing needs across Brant County, largely in Primary Settlement Areas (Growth Centres: Paris/St. George), which provide options for first-time homebuyers as well as “move-up” buyers with growing families. With this in mind, housing demand within this demographic group is anticipated to be primarily strong for grade-related housing forms including single and semi-detached, townhouses, including back-to-back and stacked townhouses.

Generation Z, the cohort which directly follows the Millennial Generation, is now entering the real estate and labour markets. Demographers and researchers typically use the mid-1990s to mid-2000s as starting birth years to describe the Generation Z cohort. For the purposes of this study, we have assumed that those born between 1993 and 2005 (16 to 28 years of age as of 2021) comprise Generation Z. As of 2016, this population represented 16% of the County’s population base; however, at that time, this population base was primarily a youth population base (11 to 23 years of age) and not a major component of the housing market. Over the next several decades, Generation Z is also anticipated to place increased demand on medium- and high-density ownership and rental housing.

It is also important to recognize the impact of Millennials and Generation Z on the nature of future employment growth, which will be increasingly driven by the knowledge-based economy. Compared to older age groups, Millennials and Generation Z have a higher average level of education attainment in Canada compared to older age groups. Millennials are considered the most educated generation; nearly 70% of Millennials

¹ Royal LePage 2021 Demographic Survey (full national, regional and city-level results): rlp.ca/table_2021demographicsurvey



have a post-secondary certificate, diploma and degree compared to the previous generation, Gen-X at approximately 55%.¹ This bodes well in accommodating labour within the knowledge-based economy; however, it has posed a challenge in accommodating employment in other sectors of the economy, including unskilled employment, as a greater share of the Baby Boomer generation enters retirement. Generation Z will continue to serve as a catalyst for both growth and change related to future office, retail, institutional and industrial developments across the County of Brant. The extent to which the County of Brant can capitalize on potential demand from these demographic groups is subject to a number of economic and socio-economic variables (e.g., relative housing costs/affordability, local and regional employment opportunities, broadband infrastructure, lifestyle preferences, local amenities, community services and perceived quality of life).

3.3.5.6 *Continuing to Plan for Older Generations*

As previously discussed, the average age of the population base in the County of Brant is getting older, due to the large concentration of Baby Boomers within the County. As of 2021, this age group is between 57 and 75 years of age. As of 2016, Baby Boomers comprised 27% of the County's population base, slightly higher than the Ontario provincial average of 25%.² As the County's Baby Boom population continues to age, the percentage of seniors, particularly older seniors (i.e., 75 years of age and older) within the County is anticipated to steadily increase over the 2016 to 2051 forecast period. From 2001 to 2016, the County's 75+ population grew at an annual rate of 2.2%. Over the 2016 and 2051 period, the forecast population growth rate for the 75+ age group is forecast to increase to 3.7% annually. This demographic trend is anticipated to be largely driven by the aging of the County's existing population, as opposed to net-migration of older residents into the County. It is important to recognize that not only is the Baby Boom age group large in terms of its population share in the County of Brant, it is also diverse with respect to age, income, health, mobility, and lifestyle/life stage.

Considerable research has been undertaken over the past decade regarding the aging population and its impact on housing needs over the long term. The majority of

¹ Statistics Canada, Income Statistics Division and Analytical Studies Branch, Statistics Canada, Economic Well-being Across Generations of Young Canadians: Are Millennials Better or Worse Off?, April 2019.

² Statistics Canada, Census 2016, population by age.



literature and commentary regarding the housing needs of older Canadians suggests that a large percentage of seniors will “age in place”; that is, they will continue to live in their current home and/or community for as long as possible even if their health changes. While there is strong rationale to support “aging in place” as a general concept, it is important to address the current characteristics of the County’s housing stock occupied by older adults (i.e., house size, built-form, location and amenities) against the socio-economic characteristics of older residents in the County (i.e. household income, housing affordability, mobility, health, etc.). These factors are also important to recognize when comparing housing preferences of Baby Boomers with previous generations. With this in mind, it is important to recognize that the concept of “aging in place” should emphasize the goal to age with some level of independence “within the community,” as opposed to simply “aging at home.” The overarching message around “aging in place” is that seniors require choice as well as access to services and amenities regarding their living arrangements. This could involve the creation of new housing through infill or intensification of established areas which can facilitate “aging in place” by providing housing options that allow seniors to remain in their communities when responding to life changes.

3.3.5.7 Components of Population Growth

Figure 3-31 through to Figure 3-33 summarize population growth in the County of Brant by component, including net migration and natural increase (births less deaths). As previously mentioned, net migration is anticipated to represent the largest component of forecast population growth in the County of Brant. This is a result of diminishing population growth from natural increase due to the aging of the population. Net migration can be broken into three broad categories, including:

- **International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents. Over the last decade, this component of net migration is anticipated to represent a relatively small source of net migration for the County of Brant;
- **Inter-provincial Net Migration** – is comprised of in-migration less out-migration from other Canadian Provinces/Territories. Historically this has also not been a major source of net-migration for the County of Brant; and
- **Intra-provincial Net Migration** – Includes in-migration less out-migration from elsewhere within the Province of Ontario. This has been a significant source of net migration over the last decade for the County of Brant.

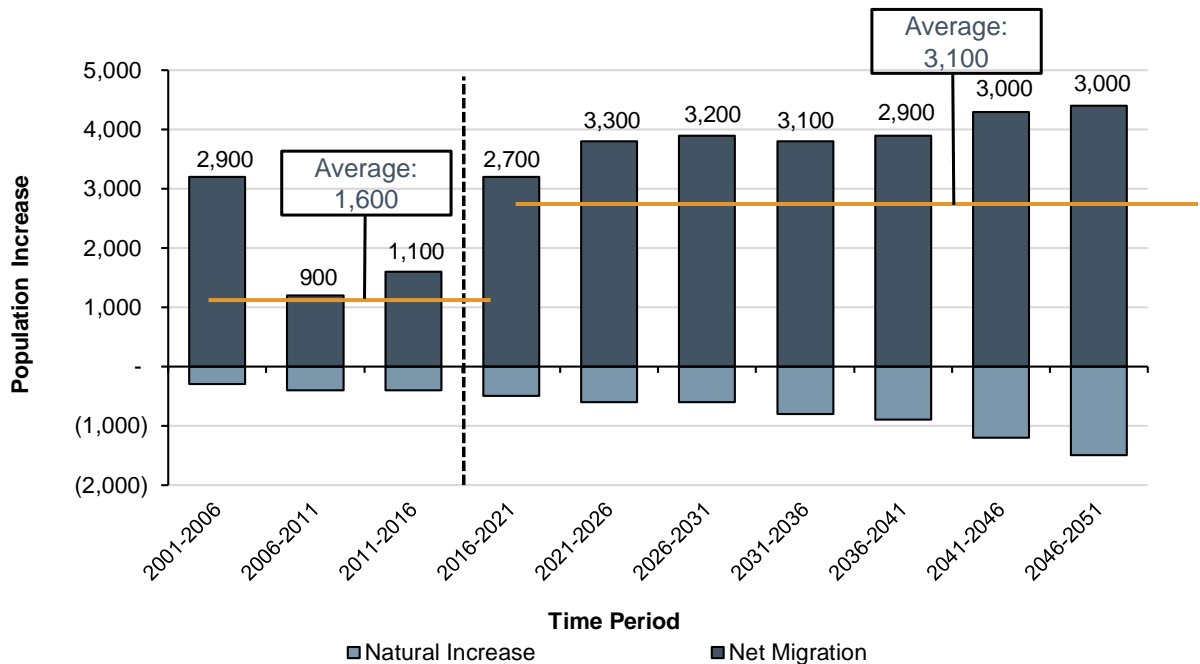


Key observations with respect to the components of population growth in the County of Brant include:

- Over the 2016 to 2051 period, population growth within the County of Brant is anticipated to be driven solely from net migration;
- The County is forecast to accommodate nearly 800 net new migrants per year (or 3,900 migrants every five years). Relative to historical trends, this represents a considerable increase (i.e., almost double) in the average historical levels of net migration experienced between 2001 and 2016;
- As previously discussed, forecast net migration in the County of Brant is anticipated to be largely driven by the long-term economic growth prospects in the regional economy and surrounding commuter-shed. Local housing growth opportunities targeted to a broad range of demographic groups (i.e., first-time homebuyers, families, empty nesters, and seniors) and the County's attractiveness as a place to work and live also represent key drivers of net future migration within the County; and
- The County is anticipated to experience relatively strong net migration across most major age groups.



Figure 3-31
County of Brant
Historical and Forecast Population Growth Associated with Net Migration
and Natural Increase, 2016 to 2051

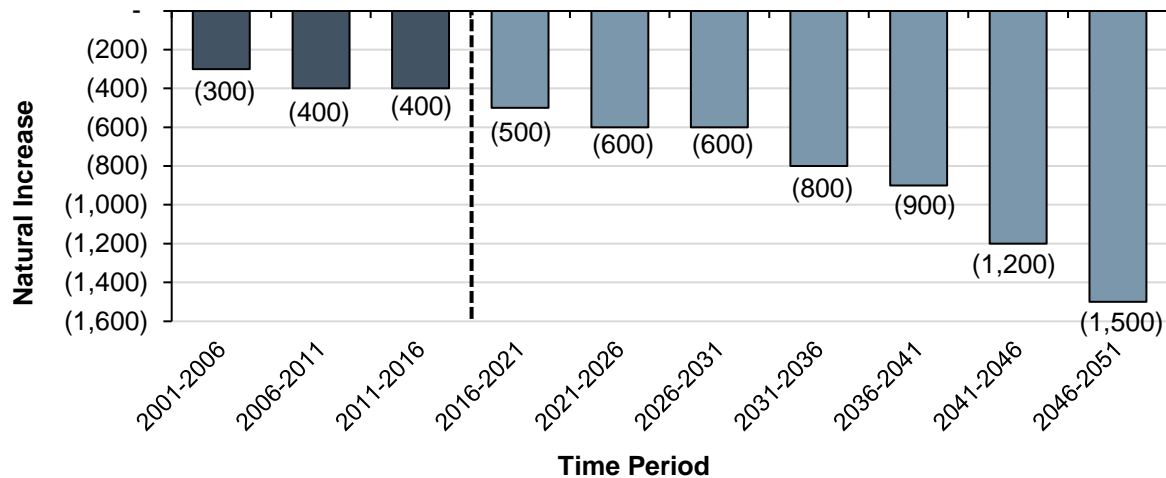


Note: Population includes net Census undercount.
Source: Historical net migration and natural increase derived from Statistics Canada, Demography Division. 2016 to 2051 estimated by Watson & Associates Economists Ltd.

Figure 3-32 summarizes forecast population growth associated with natural increase for the County of Brant relative to historical trends, while Figure 3-33 summarizes forecast population growth associated with net migration for the County. As previously illustrated, historical population growth (2001 to 2016) associated with natural increase has been negative in the County of Brant, due to the aging of the population. Over the forecast period, the share of population growth associated with natural increase is forecast to continue to decline, particularly during the post-2041 period.



Figure 3-32
County of Brant
Historical and Forecast Natural Increase, 2016 to 2051



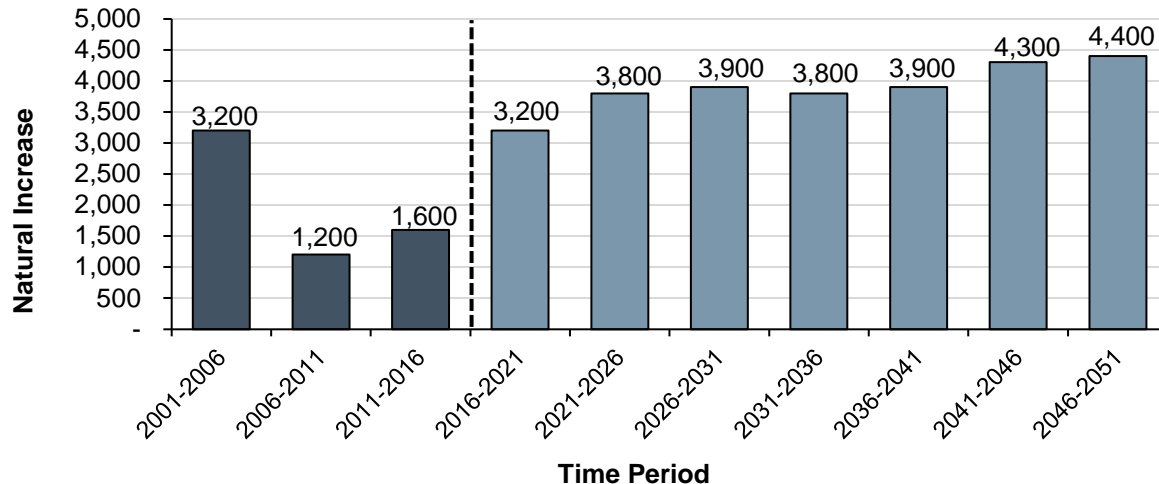
Note: Population includes net Census undercount.

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

As summarized in Figure 3-33, net migration is anticipated to increase significantly over the forecast period compared to historical trends over the past 15 years. Similar to recent historical trends, it is anticipated that a large component of net migration will come from intra-provincial migration, primarily from larger urban centres within the west G.T.H.A.



Figure 3-33
County of Brant
Historical and Forecast Net Migration Increase, 2016 to 2051



Note: Population includes net Census undercount.

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

3.3.6 County of Brant Housing Forecast to 2051

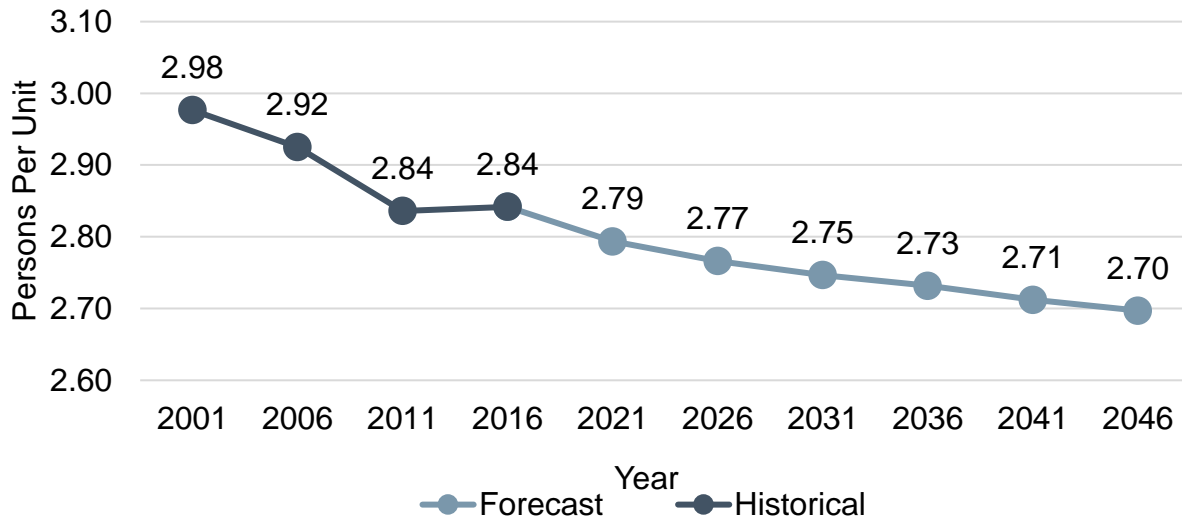
3.3.6.1 Anticipated Housing Occupancy Trends to 2051

3.3.6.1.1 Persons Per Unit

Figure 3-34 summarizes anticipated long-term forecast average housing occupancy trends (i.e., P.P.U.) for the County of Brant from 2016 to 2051 within the context of historical trends from 2001 to 2016. As previously discussed, this P.P.U. forecast is based on a headship rate analysis. As previously mentioned, recent P.P.U. levels have stabilized within the County of Brant. Recent upward impacts of COVID-19 on housing prices and rents may further exacerbate this trend as young adults defer entering into the housing market. Over the long-term forecast period, however, average household occupancy levels are expected to decline between 2016 and 2051, largely as a result of the aging of the population.



Figure 3-34
County of Brant
Historical and Forecast P.P.U., 2016 to 2051



Note: Population includes net Census undercount.

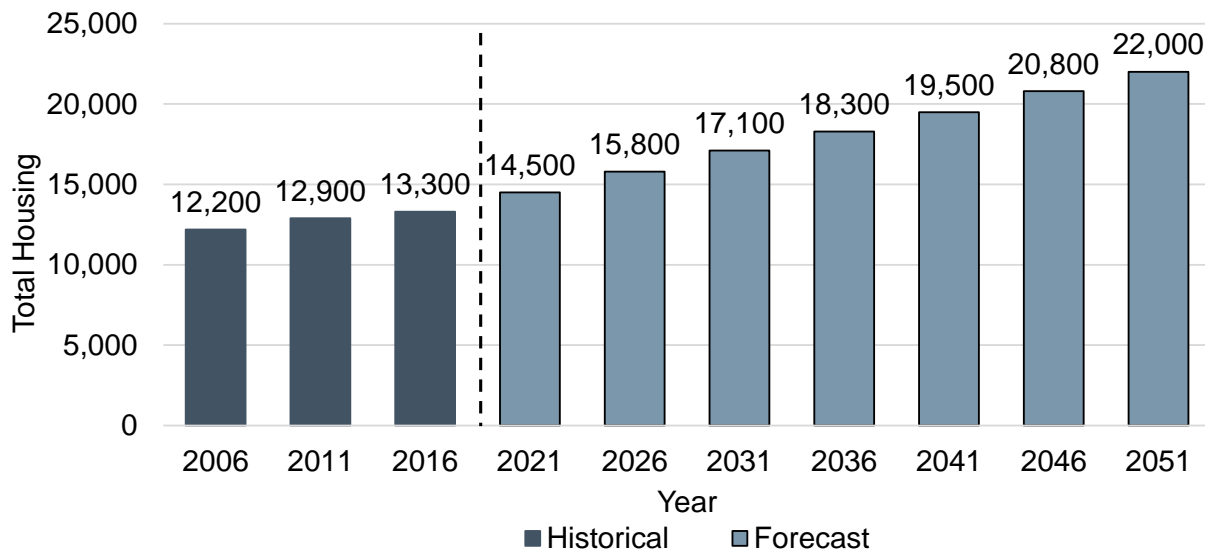
Source: Historical data derived from from Statistics Canada Census and Annual Demographic Estimates data, 2001 to 2016. Forecast by Watson & Associates Economists Ltd.

3.3.6.2 County-Wide Housing Forecast to 2051

Figure 3-35 summarizes the long-term total household forecast for the County of Brant to 2051. As of 2016, the County's housing base was approximately 13,300 units. By 2051, the number of households in the County is anticipated to increase to approximately 22,000 total households. This represents an annual housing growth rate of approximately 1.4% over the 35-year forecast period. This represents a higher rate of forecast housing growth relative to the County's historical 15-year average annual housing growth rate (1.2% from 2001 to 2016). As previously discussed, recent residential building permit activity (new units only) has been relatively strong in recent years, generating an estimated increase of approximately 240 occupied households per year between 2016 and 2021. Over the 2021 to 2051 forecast period, the County is forecast to average approximately 250 new housing units per year, which is approximately 66% higher than the average level of 150 new housing units which was achieved from 2006 to 2016.



Figure 3-35
County of Brant
Household Forecast, 2016 to 2051



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

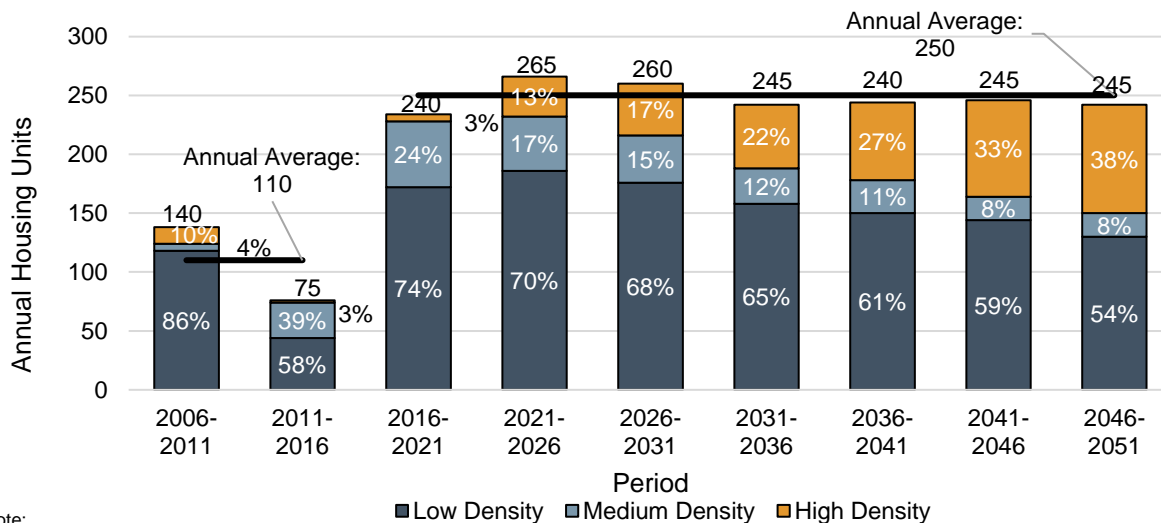
Figure 3-36 summarizes the long-term total annual household forecast for the County of Brant in five-year increments from 2016 to 2051 and by housing type. It is anticipated that a large component of housing growth will include low-density housing development at 64%, followed by medium density at 14% and high density at 22%. As previously discussed within this chapter, the propensity analysis suggests that there is a preference for low-density housing developments. While there is strong demand for low-density housing within the County, increasing demand is also anticipated for medium- and high-density housing forms to provide greater choice in housing options by type and tenure for a broad range of residents by age and income.

Addressing the interconnection between the County's competitive economic position and its longer-term housing needs by market segment is critical in realizing the County's future forecast population and employment growth potential as well as the County's ultimate goals related to prosperity, opportunity, and livability. This approach recognizes that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. To ensure that economic growth is not constrained by future labour shortages, effort will be required by Brant County and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a



diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the Region’s attractiveness to older population segments.

Figure 3-36
County of Brant
Annual Household Forecast by Housing Type,
5-Year Growth Increment, 2016 to 2051



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.
Secondary unit potential is included in the high-density housing category.

Source: 2006 to 2016 derived from Statistics Canada Census and 2016 to 2051 forecast by Watson & Associates Economists Ltd.

3.4 Observations

It is recognized that future population and employment growth within the County of Brant is strongly correlated with the growth outlook and competitiveness of the economy within the County of Brant and the surrounding region – which in this case is largely represented by the G.G.H.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. Due to its geographic location within the southwestern region of the G.G.H. Outer Ring, the County of Brant is forecast to experience significant outward growth pressure over the next several decades largely from the west and north G.T.H.A.



upper-tier municipalities, which have historically been amongst the fastest growing municipalities in Ontario in recent decades.

By 2051, the County of Brant's total population base is forecast to grow to approximately 59,000 persons as per Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 21,200 residents between 2016 and 2051, or an average annual population growth rate of 1.3% during this time period.

Accommodating forecast total population growth in the County of Brant will require approximately 8,700 new households, or almost 248 new Census households annually over the 2016 to 2051 period (or 250 over the 2021 to 2051 period). In accordance with the comprehensive analysis provided as part of this report, the Growth Plan, 2019 is recommended as the preferred long-term growth scenario for the County of Brant. As such, a higher long-term population forecast for the County of Brant is not supported for the purposes of long-term growth management and urban land needs analysis.

It is important to recognize that while the County's population base is growing, it is also getting older. Between 2016 and 2051, the 75+ age group (older seniors) is forecast to represent the fastest growing population age group, with an average annual population growth rate of 3.7%. With an aging population, the County will be more reliant on net migration as a source of population as opposed to natural increase. With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density forms including seniors' housing and affordable housing options. The County of Brant is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.



Chapter 4

Population and Housing Allocations



4. Population and Housing Growth Allocations to 2051

4.1 Introduction

This chapter provides a summary of the forecast population and housing allocations by Urban System and Rural System within the County of Brant.¹ Detailed tables on population and housing growth allocations are provided in Appendix C.

4.1.1 Allocation Review

The population and housing allocations by Primary Settlement Areas (Growth Centres) (Urban System) and Rural System were developed based on a detailed review of the following local supply and demand factors.

Local Supply Factors:

- Supply of potential future housing stock in the development process by housing structure type and approval status;
- Housing intensification opportunities;
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process;
- Water and wastewater servicing capacity and potential solutions to overcome constraints (where identified); and
- Provincial policy direction regarding forecast residential growth by urban system versus rural system.

Demand Factors:

- Historical population and housing activity by structure type based on Statistics Canada (Census) data by Primary Settlement Areas (Growth Centres) and Rural Settlements (Secondary Settlement Areas and Hamlets) and remaining areas in the Rural System;

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

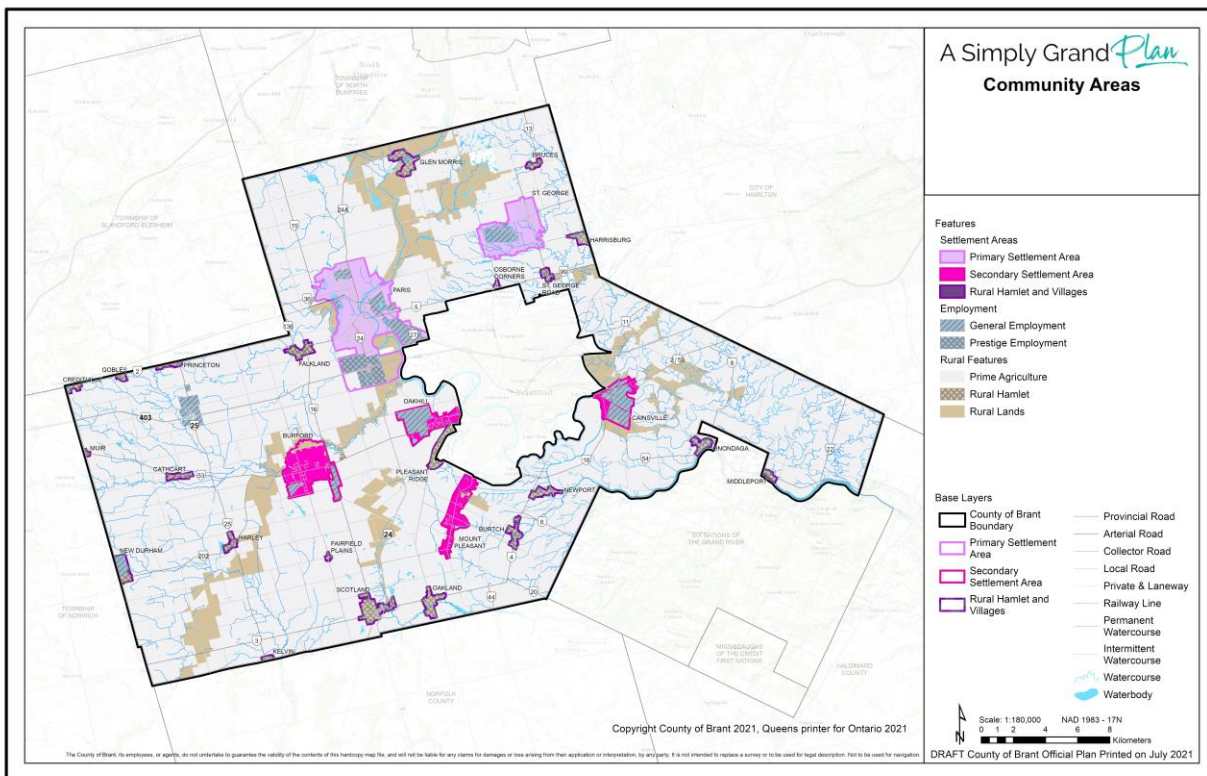


- A review of historical residential building permit activity (new units only) by structure type from 2011 to 2020 by Primary Settlement Areas (Growth Centres) and the Rural System;
- The influence of population and employment growth within the surrounding market areas on the geographic distribution of growth and settlement patterns across the County;
- Market demand for housing intensification; and
- Appeal to families and empty nesters/seniors.

4.1.2 Location of Urban Settlement Areas and Rural System

Figure 4-1 provides a map of the Community Structure which illustrates the proposed Urban System and Rural System within the County of Brant as discussed in Chapter 2.

Figure 4-1
County of Brant
Map of Proposed Community Structure



Source: County of Brant, Draft New O.P.

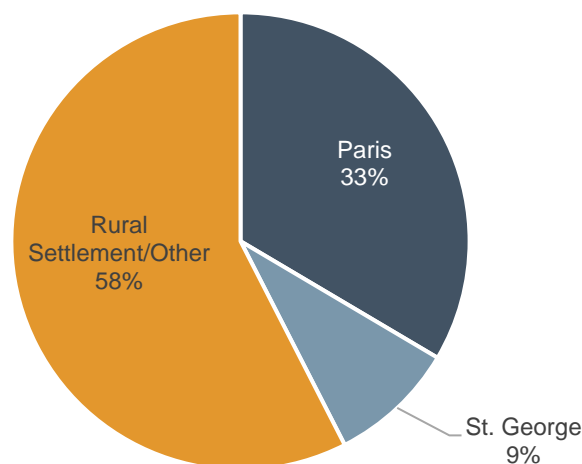


4.2 County of Brant Population by Primary Urban Growth Settlements and Rural System

4.2.1 County of Brant Population and Housing by Geographic Area, 2016

In 2016, the County of Brant had a population of approximately 37,800. Of the County's 2016 population base, approximately 42% was located within the County of Brant's Primary Settlement Areas (Growth Centres) of Paris and St. George, as illustrated in Figure 4-2. In terms of population, Paris was the largest urban settlement area with a population of 12,700. This is followed by St. George with a population of approximately 3,400. The County's Rural System accommodated a population of approximately 21,800, representing 58% of the County's population base.

Figure 4-2
County of Brant
Population by Area, 2016

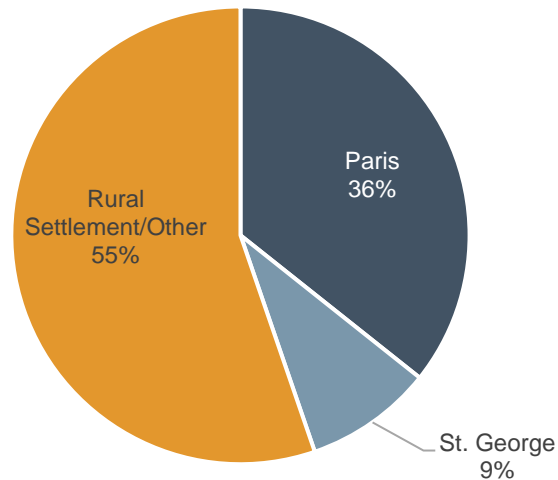


Source: Watson & Associates Economists Ltd.

The County of Brant had a housing base of approximately 30,270 in 2016, of which 45% was accommodated in the Primary Settlement Areas (Growth Centres) of Paris and St. George. In terms of total households, Paris accommodated 4,740 units and St. George 1,200 units. The County's Rural System accommodated approximately 7,330 households, representing 55% of the County total.



Figure 4-3
County of Brant
Housing by Area, 2016



Source: Watson & Associates Economists Ltd.

4.2.2 Historical Growth by Primary Settlement Areas (Growth Centres) and Rural System, 2006 to 2016

Figure 4-4 and Figure 4-5 summarize historical population and housing growth trends in the County of Brant by Primary Settlement Areas (Growth Centres) and Rural System over the past 10 years by Census period. Key observations include:

- The Primary Settlement Areas (Growth Centres) of Paris experienced the most County-wide growth, with its population increasing by 1,050 people representing 53% of the County of Brant's population growth over the 10-year period. Households increased by 490 units in Paris representing 48% of County-wide housing growth over the same period. In terms of annual growth rates, the Paris population grew at a rate of 0.9% and housing 1.1%, which is higher than the County-wide rate of 0.5% and 0.8%, respectively.
- The Primary Settlement Areas (Growth Centres) of St. George grew by 280 people, representing 14% of the County of Brant population growth over the 10-year period. Households increased by 160 units in St. George representing 15% of County-wide housing growth over the same period. Even with lower total population and housing growth relative to the other areas, St. George experienced population and housing annual growth rates of 0.9% and 1.4%, well above the County-wide average.



- The Rural System population increased by 670 people from 2006 to 2016, comprising 34% of County-wide growth. Housing units increased by 380 units over the 10-year period, accounting for 37% of all housing unit growth in the County of Brant. In terms of annual growth rates, the Rural System has experienced relatively lower population and housing rates of 0.3% and 0.5%, respectively, relative to Paris and St. George.

Figure 4-4
County of Brant
Historical Population Growth by Primary Settlement Areas (Growth Centres) and Rural System, 2006 to 2016

Area	2006	2016	2006 to 2016	10-Year Annual Average	Share of County 10-Year Growth	10-Year Annual Growth Rate
Paris	11,630	12,680	1,050	105	53%	0.9%
St. George	3,070	3,350	280	28	14%	0.9%
Rural System ¹	21,100	21,770	670	67	34%	0.3%
County of Brant	35,800	37,800	2,000	200	100%	0.5%

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

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

Source: Watson & Associates Economists Ltd.

Figure 4-5
County of Brant
Historical Census Housing Growth by Primary Settlement Areas (Growth Centres) and Rural System, 2006 to 2016

Area	2006	2016	2006 to 2016	10-Year Annual Average	Share of County 10-Year Growth	10-Year Annual Growth Rate
Paris	4,240	4,740	490	49	48%	1.1%
St. George	1,040	1,200	160	16	15%	1.4%
Rural System ¹	6,950	7,330	380	38	37%	0.5%
County of Brant	12,240	13,270	1,030	103	100%	0.8%

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

Note: Figures may not equal totals due to rounding.

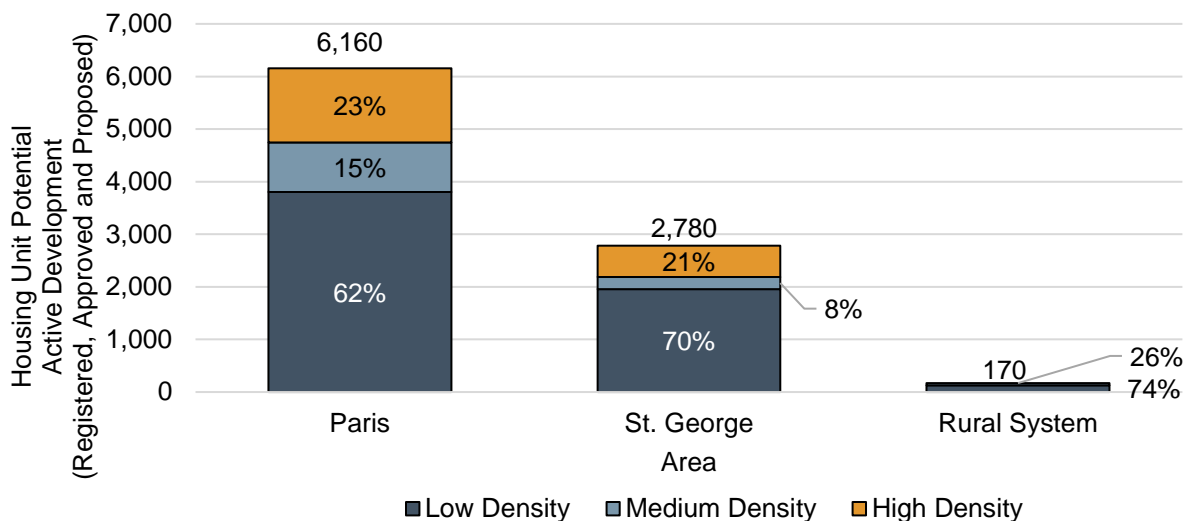
Source: Watson & Associates Economists Ltd.



4.2.3 Anticipated Housing Development by Primary Settlement Areas (Growth Centres) and Rural System

The County's active residential development application data was reviewed to provide insight into the demand for residential housing units by Primary Settlement Areas (Growth Centres) and Rural System. Figure 4-6 and Figure 4-7 provide a summary of potential housing units on vacant lands with approved and proposed development applications. It is estimated that approved applications (registered unbuilt and draft approved) have the potential to accommodate 7,190 housing units, of which the majority of these developments are concentrated in Paris (61%) followed by St. George (39%). It is estimated that proposed developments have the potential to accommodate an additional 1,920 units, the majority of which are concentrated in Paris. Overall, Paris represents 68% of the housing unit potential with respect to active developments in the planning approvals process, followed by St. George at 30% and the remaining 2% in the Rural System.

Figure 4-6
County of Brant
Housing Potential on Vacant Lands
Registered Unbuilt/Draft Approved and Applications Under Review
by Primary Settlement Areas (Growth Centres) and Rural System, Year-End 2020



Note: The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Source: Derived from County of Brant data by Watson & Associates Economists Ltd.



Figure 4-7a
County of Brant
Housing Potential on Vacant Lands
Registered Unbuilt/Draft Approved and Applications Under Review
by Primary Settlement Areas (Growth Centres) and Rural System, Year-End 2020

Area & Stage of Development	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units	Total Housing Unit Share
Paris – Registered	1,133	534	770	2,437	27%
Paris – Draft Approved	1,176	374	417	1,967	22%
Paris – Proposed	1,493	39	221	1,753	19%
Paris – Total	3,802	947	1,408	6,157	68%
St. George – Registered	97	0	0	97	1%
St. George – Draft Approved	1,860	232	592	2,684	29%
St. George – Total	1,957	232	592	2,781	30%
Rural System – Proposed/Total	126	44	0	170	2%
County of Brant Total	5,885	1,223	2,000	9,108	100%

Source: Based on County of Brant data as of December 2020.

In addition to an active development pipeline of approximately 9,100 potential housing units within the County, there is the potential for an additional 610 housing units on vacant urban lands within no active applications in Paris. In total, the County of Brant has the potential to accommodate 9,110 housing units on designated lands including active applications in the Rural System.



Figure 4-8
County of Brant
Housing Potential on Vacant Urban Lands, No Active Applications,
As of Year-End 2020

Area	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units
Paris	468	0	144	612
Share	76%	0	24%	100%

Source: Based on County of Brant data as of December 2020.

4.2.4 County of Brant Population and Housing Allocations by Primary Settlement Areas (Growth Centres) and Rural System to 2051

Figure 4-9 to Figure 4-14 provide a summary of the population and housing forecast to 2051 by Primary Settlement Areas (Growth Centres) and Rural System. Further details are provided in Appendix C. While population and employment growth rates vary by geographic area, each of the areas share a number of relatively common attributes with respect to long-term residential development and demographic trends. These include:

- All areas are expected to experience housing growth over the long-term forecast period;
- Average annual new housing construction is anticipated to increase from recent levels experienced over the past ten years in Primary Settlement Areas (Growth Centres);
- Future housing growth will be dominated by low-density housing forms; however, increasing market opportunities will exist for medium-density and high-density housing; and
- P.P.U. levels are forecast to experience a slight decline over the planning horizon. In addition to previously discussed demographic trends, a moderate shift from Census families and Census non-families is also forecast to have a downward influence on projected P.P.U. levels.

As identified above, various factors were considered in allocating population and housing growth by Primary Settlement Areas (Growth Centres) and Rural System. In



In addition to the above considerations, a number of assumptions were made with respect to the residential growth potential of each area, based on discussions with County staff.

Key observations regarding the housing and population growth allocations by Primary Settlement Areas (Growth Centres) and Rural System are provided below. As previously mentioned, further details on the population and housing by Primary Settlement Areas (Growth Centres) and Rural System are provided in Appendix C, which includes details on the housing by structure type, existing population and housing base and forecast to 2051.

Paris

- The existing population base in Paris as of 2016 comprises 34% of the population within the County of Brant.
- As summarized in Figure 4-10, Paris is anticipated to accommodate the largest share (approximately 60%) of the County's population growth over the 2016 to 2051 forecast horizon. This is consistent with historical population and housing trends observed.
- Paris is anticipated to grow at an annual population rate of 2.0% over the next 35 years (2016 to 2051), which is higher than the annual growth rate experienced over the most recent 10-year Census period (2006 to 2016) at 0.9% annually.
- As summarized in Figure 4-12, Paris is anticipated to add 5,135 additional housing units over the 2016 to 2051 period, representing approximately 147 units annually, which is almost triple the annual housing units added over the 2006 to 2016 period (as previously summarized in Figure 4-5, the annual households added over the 2006 to 2016 period was 49 units).
- It is anticipated that Paris will accommodate a wide range of housing by structure type compared to historical trends; however, the largest portion of housing growth is anticipated in low-density housing forms as summarized in Figure 4-14. This is consistent with upcoming development in the Primary Settlement Areas (Growth Centres) active development pipeline (registered/unbuilt and proposed), as previously discussed.
- The majority of future development in Paris is anticipated to be accommodated within the D.G.A., as will be discussed later in this chapter.



St. George

- St. George's existing population base as of 2016 comprises 9% of the population within the County of Brant.
- As summarized in Figure 4-10, St. George is anticipated to accommodate approximately one-fifth (20%) of the County's population growth over the 2016 to 2051 forecast horizon. It is important to recognize that most of the population growth (nearly 80%) during the long-term planning horizon will occur post-2031 (2031 to 2051).
- Population growth within St. George is anticipated to be significantly higher than historical trends. As summarized in Figure 4-11, St. George is anticipated to achieve a slightly higher rate of population growth (2.3% annually) relative to Paris. Comparatively, the annual population growth rate in St. George over the 2006 to 2016 period was approximately 0.9% annually.
- As summarized in Figure 4-12, St. George is anticipated to add 1,650 additional housing units over the 2016 to 2051 period, or approximately 47 units annually, which is significantly higher than the housing units added over the 2006 to 2016 period of approximately 16 units annually.
- The majority of future urban development in St. George is anticipated to be accommodated within the D.G.A., as will be discussed later in this chapter.

Rural System

- The 2016 population of the Rural System comprises 58% of the County of Brant population.
- As summarized in Figure 4-10, the Rural System is anticipated to accommodate one-fifth (20%) of the County's population growth over the 2016 to 2051 forecast horizon. It is important to recognize that almost a quarter of the population growth during this period has already occurred over the last five years (2016 to 2021).
- Post-2021, it is anticipated that growth within the Rural System will gradually slow, largely due to municipal servicing constraints.
- As a result, the Rural System is anticipated to have a noticeably lower growth rate relative to the Primary Settlement Areas (Growth Centres) of Paris and St. George. The annual population growth rate of the Rural System is anticipated to



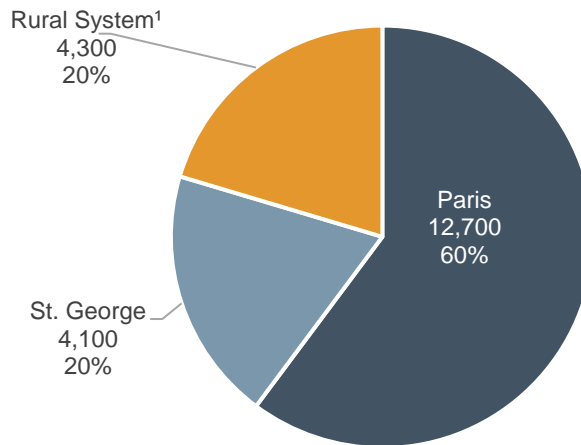
increase at a rate of 0.5%, which is higher than the growth rate observed over the most recent 10-year Census period of 0.3% annually.

Figure 4-9
County of Brant
Population Forecast by Primary Settlement Areas (Growth Centres) and Rural System

Year	Paris	St. George	Rural System ¹	County of Brant
2016	12,700	3,400	21,800	37,800
2051	25,400	7,500	26,100	59,000
2016 to 2051	12,700	4,100	4,300	21,200

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Note: Figures may not add precisely due to rounding.
Source: Based on County of Brant data as of December 2020.

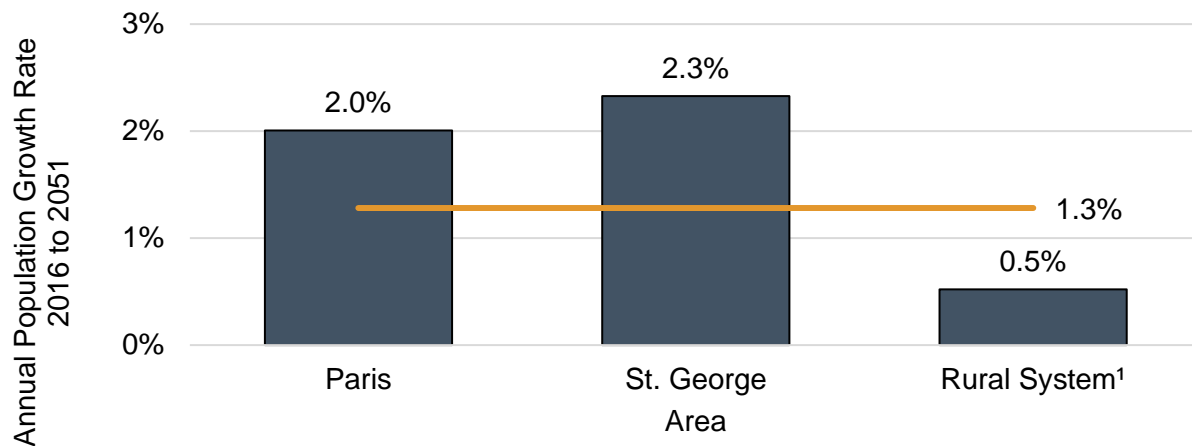
Figure 4-10
County of Brant
Population Growth Allocation, 2016 to 2051
by Primary Settlement Areas (Growth Centres) and Rural System



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Note: Figures have been rounded.
Source: Watson & Associates Economists Ltd.



Figure 4-11
County of Brant
Annual Population Growth Rate, 2016 to 2051
By Primary Settlement Areas (Growth Centres) and Rural System



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
 Note: Population includes net Census undercount.
 Source: Watson & Associates Economists Ltd.

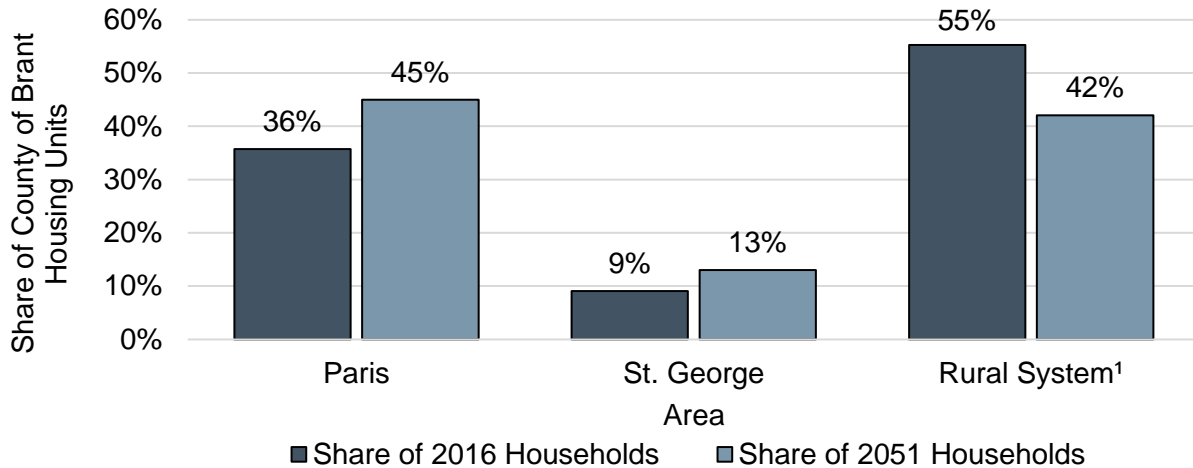
Figure 4-12
County of Brant
Housing Forecast by Primary Settlement Areas (Growth Centres) and Rural System

Year	Paris	St. George	Rural System ¹	County of Brant
2016	4,735	1,200	7,330	13,265
2051	9,870	2,850	9,225	21,940
2016 to 2051	5,135	1,650	1,895	8,675

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
 Note: Figures may not add precisely due to rounding.
 Source: Based on County of Brant data as of December 2020.

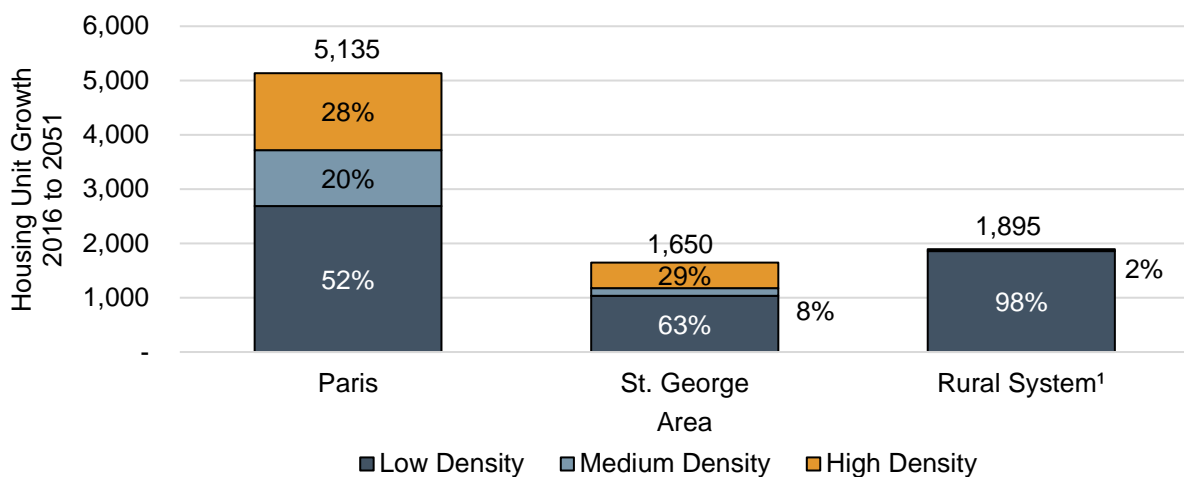


Figure 4-13
County of Brant
Share of County Housing Units in 2016 and 2051
By Primary Settlement Areas (Growth Centres) and Rural System



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Source: Watson & Associates Economists Ltd.

Figure 4-14
County of Brant
Housing Growth by Primary Settlement Areas (Growth Centres) and Rural System,
2016 to 2051



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Note: Figures have been rounded.
Source: Watson & Associates Economists Ltd.



4.3 Intensification Analysis

4.3.1 *Defining Residential Intensification*

The Growth Plan considers any residential development within the delineated B.U.A. as intensification, which counts towards the intensification target. As previously discussed in Chapter 2, a B.U.A. was delineated for all urban settlements within the G.G.H. by the Province in 2006. The B.U.A. was based on the portion of the urban settlement that was primarily developed as of 2006. The remaining portion of the urban settlement outside the B.U.A. is referred to as the D.G.A. It is important to note that the delineation of the B.U.A. does not change over time.

As discussed in Chapter 2, the Growth Plan intensification target is a minimum and planning for a lower target requires an alternative request to be made to the Province. The intensification target is based on the minimum percentage of all residential development occurring annually within the delineated B.U.A. This target is measured from July 2022 to 2051. The start of the period in mid-2022 represents the required O.P. review completion deadline for all upper-tier and single-tier municipalities in accordance with the Growth Plan. The County of Brant is required to target or improve upon the existing intensification target set in the County's existing O.P. which is currently 15%.

Intensification can take many forms. The P.P.S., 2020 defines intensification as development of a property, site or area at a higher density than currently exists already. As previously discussed, intensification under the Growth Plan builds on the P.P.S. definition, but also includes all other residential development within the B.U.A. The following are examples of intensification forms:

- Development on vacant sites within the B.U.A.;
- Redevelopment, including the reuse of brownfield sites;
- Additional development on underutilized lots;
- Infill development, development on small vacant sites surrounded by developed parcels;
- Expansion or conversion of existing buildings (e.g., non-residential building converted to residential use); and
- Second Units (or Additional Residential Unit).



4.3.1.1 *Benefits of Residential Intensification*

Residential intensification provides an opportunity to broaden the choice of housing, particularly towards medium- and high-density housing forms in settings which are rich in urban amenities, such as downtown areas, as well as other potential redevelopment areas, which can encourage pedestrian friendly, healthy and complete communities. More specifically, residential intensification provides many potential benefits for the County of Brant including:

- Opportunities to promote “Place-Making”¹ and enhance the vibrancy of mature neighbourhoods and core areas by continuing to attract new residents as well as commercial investment;
- Supporting local businesses by increasing foot traffic;
- Creating active streets to promote healthier lifestyle options (i.e., pedestrian and cycling);
- Decreasing the number or length of automotive travel trips by providing housing opportunities for shopping and employment options closer to home;
- Reducing the County’s need to accommodate housing within existing greenfield areas and/or urban expansion areas;
- Expanding the housing options with a potential for higher density, or housing in a mixed-use environment; and
- Potential environmental impacts associated with reduced automobile dependency and urban land consumption.

4.3.1.2 *County of Brant Residential Intensification Trends*

Since 2006, a large portion of housing growth that occurred within the County’s B.U.A. primarily consisted of at-grade housing (singles, semi-detached and townhouses) that included the completion of later phases of subdivisions that were built after the delineation of the B.U.A. in 2006. Over the 2016 to 2020 period, approximately 29% of the County’s housing occurred within the B.U.A., representing approximately 69 housing units annually. It is important to recognize, however, that a large share of residential intensification the County has recently achieved has been associated with single-

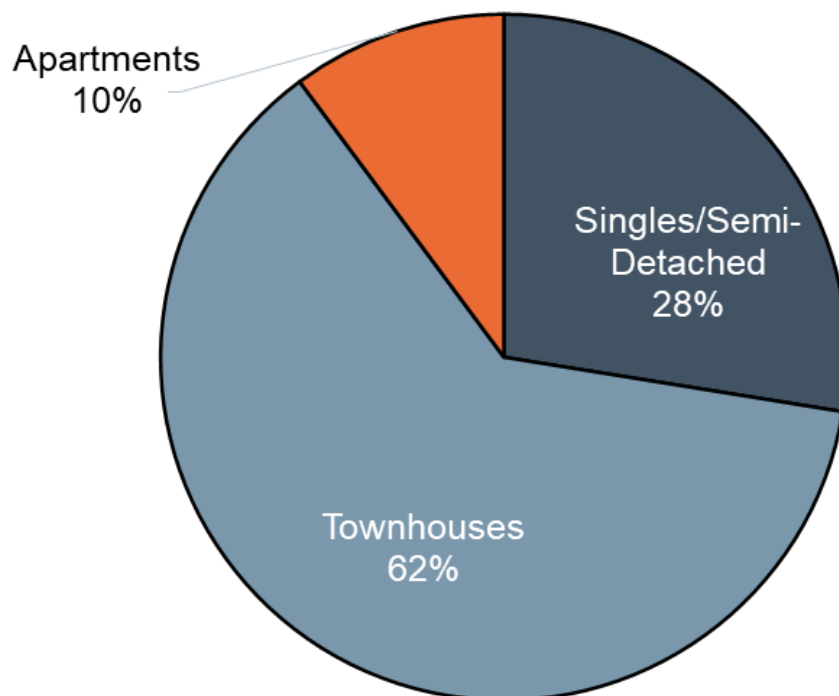
¹ Place-making is a process of creating unique, quality locations, places or spaces that possess a strong sense of place. With respect to places of work, the concept of place-making often encompasses the attraction of knowledge-based workers and businesses with an emphasis on collaboration, connection, and innovation.



detached housing development associated with the rounding out of low-density subdivisions since the creation of the B.U.A. in 2006. Over the long-term planning horizon, it is anticipated these opportunities will steadily diminish over time.

As summarized in Figure 4-15, residential housing growth over this most recent five-year period still includes a large portion of at-grade housing, approximately 90% of the housing development within the B.U.A. This housing growth primarily consisted of the completion of subdivisions, as well as 15 infill sites accommodating over 530 housing units on 20 ha of land. Examples of intensification development over the past five years is provided in Figure 4-16.

Figure 4-15
County of Brant
New Housing Unit Activity within the B.U.A.,
2016 to 2021



Source: Derived from the County of Brant building permit activity by Watson & Associates Economists Ltd. Based on occupancy of building permits issued between 2015 and 2020.



Figure 4-16
County of Brant
Examples of Intensification Developments in the B.U.A.



Re-purposed Apartments, Paris –
14 West River (56 units)



Townhouse Infill Development, Paris
– 23 & 59 Cedar St. (48 units)



Single/Semi/Townhouse Infill Development,
Paris – Willow Street Hampton Trails (24 units)



Townhouse Infill Development, Paris –
80 Willow Street (95 units)

4.3.1.3 *Housing Supply Opportunities within the B.U.A.*

As summarized in Figure 4-17, the County has approximately 1,165 residential housing units in the B.U.A. that are in the planning approval process (i.e., approved and proposed). This includes sites that can accommodate a mix of at-grade housing, such as single/semi-detached and townhouses. The largest development in the planning process in the B.U.A. is the approved residential development on the former Paris Golf Course lands with approximately 780 units. In addition to the units in the approvals process, the County has conducted a review of short-, medium- and long-term residential intensification supply opportunities within the Paris and St. George B.U.A. of sites that are not currently in the planning approval process. The County has identified 52 intensification sites within Paris and St. George (totalling 64 ha) that depending on



the density have the potential to accommodate between 2,820 and 4,940 residential units, as summarized in Figure 4-17, Table B.

Overall, the B.U.A. of Paris and St. George has the potential to accommodate up to 6,100 residential units, as summarized in Figure 4-17, Table C.

Figure 4-17
County of Brant
B.U.A.
Residential Housing Unit Potential

Table A: Approved/Proposed	Low-Density Units	Medium-Density Units	High-Density Units	Total Units
Paris	463	275	343	1,081
St. George	0	0	84	84
Total	463	275	427	1,165

Table B: Additional Intensification Opportunities	Low-Range Yield Units	High-Range Yield Units
Paris	1,739	3,045
St. George	1,079	1,890
Total	2,818	4,935

Table C: Total Intensification Potential	Low-Range Yield Units	High-Range Yield Units
Total Intensification Potential (Table A + B)		
Paris	2,820	4,126
St. George	1,163	1,974
Total	3,983	6,100

Source: Based on County of Brant residential supply. Data summarized by Watson & Associates Economists Ltd.



Figure 4-18a
County of Brant
Paris B.U.A.
Residential Housing Unit Intensification Potential

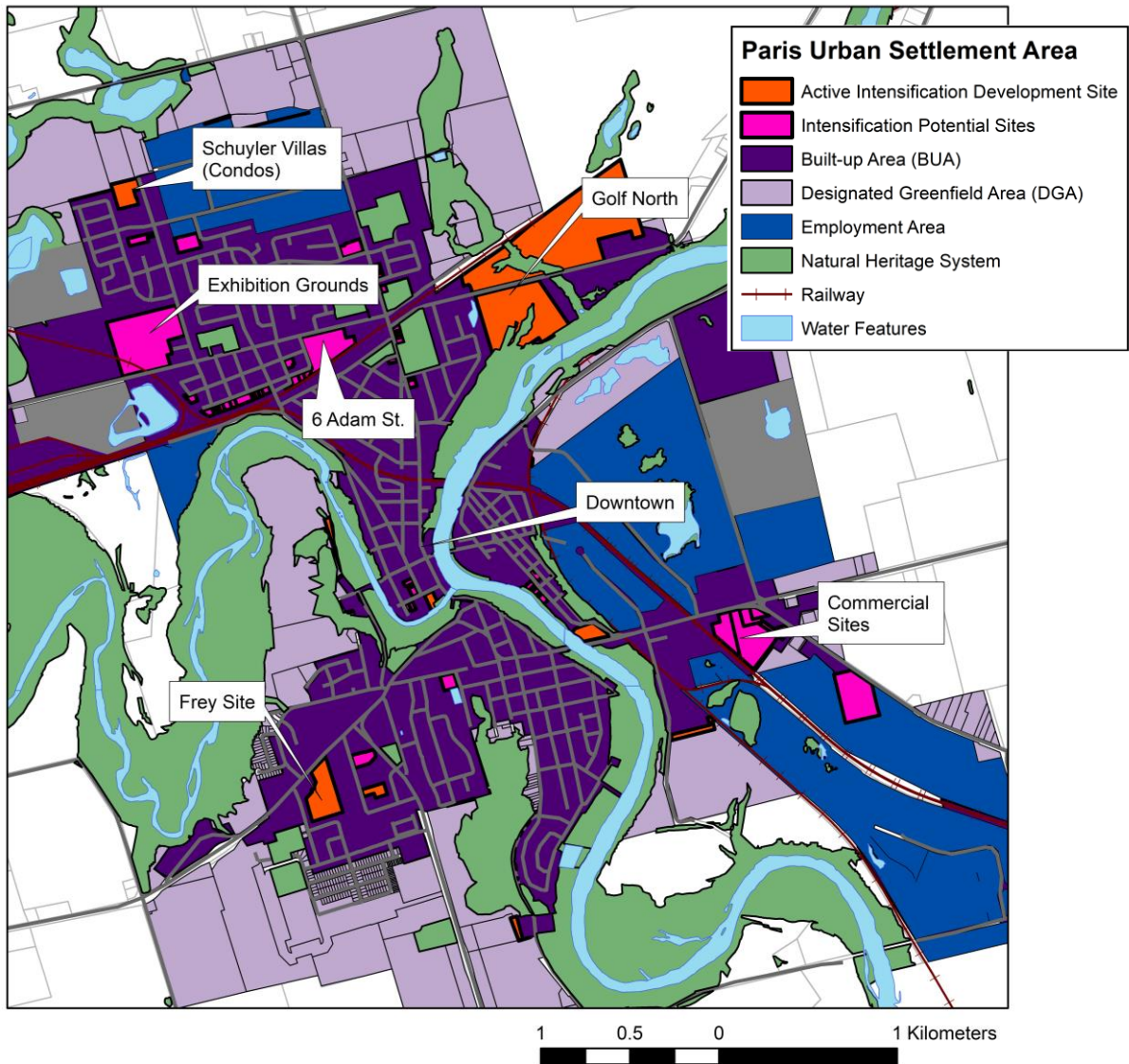
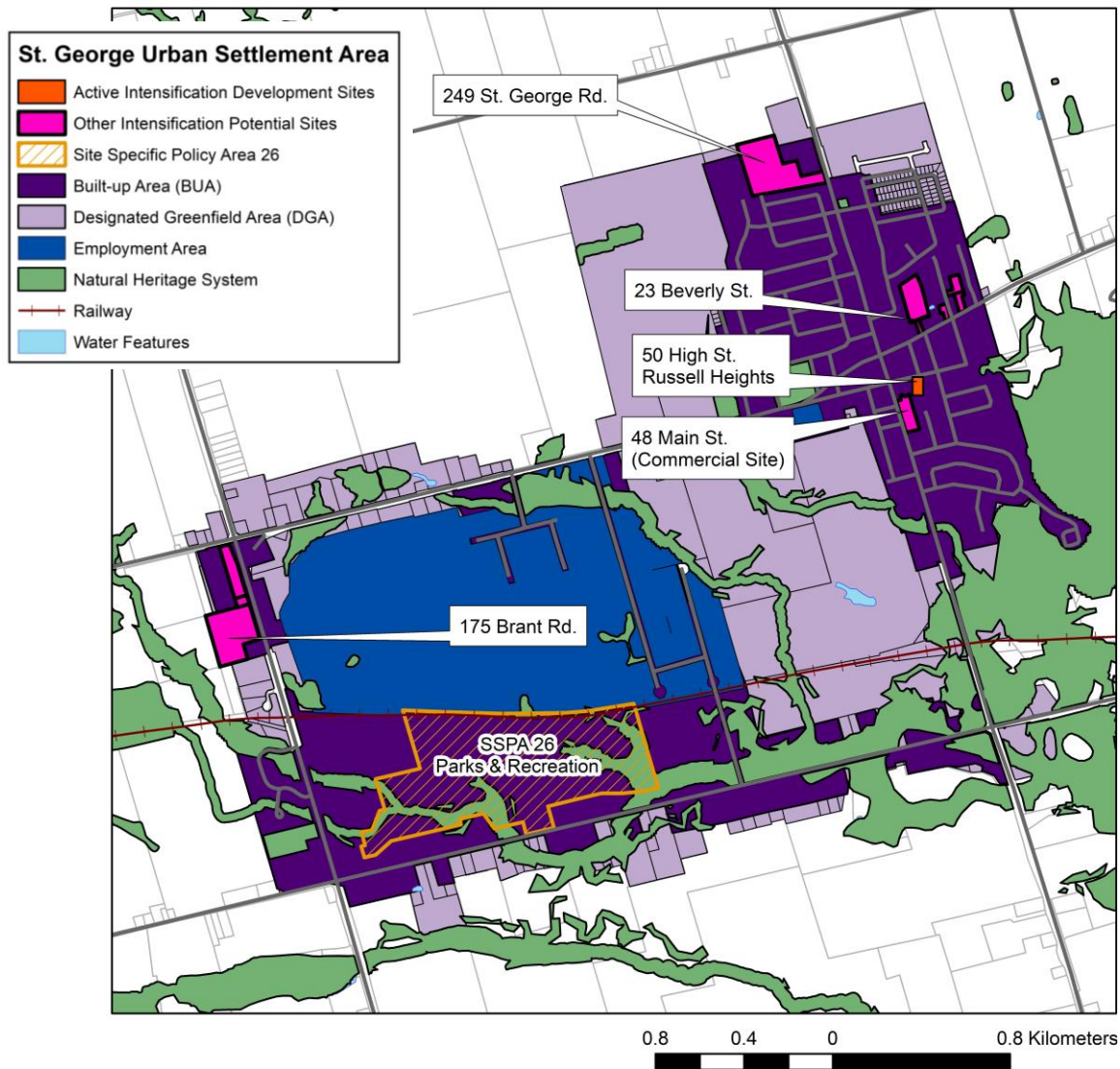




Figure 4-18b
County of Brant
St. George B.U.A.
Residential Housing Unit Intensification Potential



4.3.1.4 Second Unit Opportunities

Opportunities to accommodate future housing growth through second units is an important consideration. The More Homes, More Choice: Ontario's Housing Supply Action Plan, 2019 and *Bill 108, More Homes, More Choice Act, 2019* emphasize to decision-makers that affordable housing is a key priority for the Province. In accordance with the Act, municipalities are required to establish O.P. policies and



zoning by-law provisions allowing second units in detached, semi-detached and row houses, as well as in ancillary structures. Brant’s mature neighbourhoods are characterized by a significant share of low-density housing, conducive to the development of second units. Second units offer an effective means to achieve intensification. Over the forecast horizon, it is assumed that the County’s D.G.A. and Rural Area will also provide opportunities for second suites. A second unit forecast has been prepared based on available C.M.H.C. survey data on the average shares in the municipalities of the surrounding area (e.g., City of Brantford and City of Hamilton).¹ It is estimated that approximately 3% of low-density housing units forecast by 2051 in the County of Brant would accommodate second units. Based on this assumption, approximately 520 second units (17 units annually) are anticipated to be accommodated in the County by 2051. As summarized in Figure 4-19, approximately 55% would be accommodated in the B.U.A., 25% in the D.G.A. and 20% in the Rural Area. It is important to note that secondary units have a high-density occupancy but are a grade-related housing form. For the purposes of forecasting and land needs presented herein, all secondary units are captured as high density.

Figure 4-19
County of Brant
Second Unit Forecast, 2021 to 2051

Second Unit Forecast	Total Housing Units	Annual Housing Units
Low-Density Housing Units at 2051	17,490	
Estimated Low-Density Units Accommodating Second Units at 2051 (3%)	520	
B.U.A. Share of Total Second-Unit Forecast, 2021-2051 (55%)	286	10
D.G.A. Share of Total Second-Unit Forecast, 2021-2051 (25%)	130	4
Rural Area Share of Total Second-Unit Forecast, 2021-2051 (20%)	104	3
Total Second Units, County-Wide, 2051	520	17

Source: Watson & Associates Economists Ltd.

¹ CMHC, Housing Market Insight Ontario, Secondary Suites in Ontario, June 2021, Table 1. CMHC report is based on 2019 survey completed.



4.3.1.5 Intensification Target and Housing Forecast in B.U.A.

As previously noted, the County has a current intensification target of 15% of housing annually within the B.U.A. The B.U.A. in Paris, and to a lesser extent, St. George offers an opportunity to accommodate a wide range of housing options (low, medium, and high density). As well, the active planning applications/approved developments suggest the County can achieve at least 48 units annually in the B.U.A. Accordingly, it is recommended that the County target a higher intensification rate of 20% of housing growth within the B.U.A.

Figure 4-20
County of Brant
Residential Housing Forecast by Policy Area, 2022 to 2051

Area	B.U.A.	D.G.A.	Rural	Total	B.U.A.	D.G.A.	Rural	Total
Paris	1,305	2,777	0	4,080	32%	68%	0%	100%
St. George	84	1,476	0	1,560	5%	95%	0%	100%
Total Urban Area	1,389	4,253	0	5,640	25%	75%	0%	100%
Rural Area	0	0	1,200	1,200	0%	0%	100%	0%
County-Wide	1,389	4,253	1,200	6,840	20%	62%	18%	100%
Shares	20%	62%	18%	100%	20%	62%	18%	100%

Note: Totals have been rounded and may not add up precisely. Second units are embedded in the above figure.

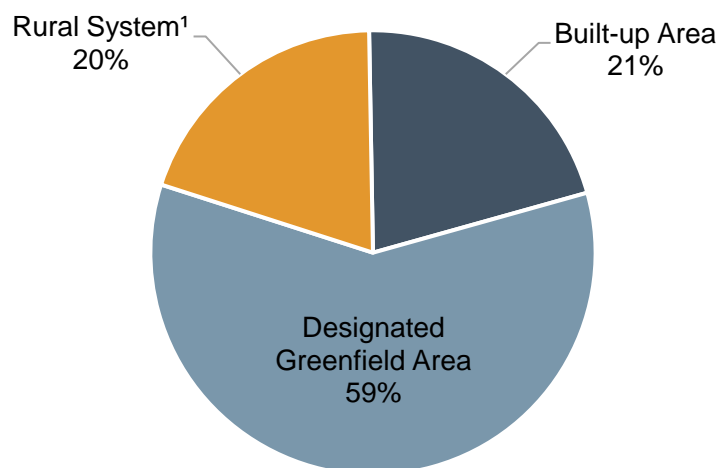
Source: Watson & Associates Economists Ltd.

4.4 Population and Housing Forecast by Policy Area (B.U.A./D.G.A.) to 2051

As previously discussed, most of the County's population and housing growth is directed to Urban Settlement Areas with municipal servicing. As summarized in Figure 4-21, 80% of population growth is anticipated to be accommodated within the County's Urban System from 2016 to 2051, of which 59% is in the D.G.A. and 21% in the B.U.A. The remaining 20% of population growth is to be accommodated within the County's Rural System. It is anticipated that the County will shift more towards an increasingly concentrated population within the Urban Settlement Areas, enlarging the County's Urban System population base share of 42% in 2016 to 56% by 2051.



Figure 4-21
County of Brant
Population Growth by Policy Area (B.U.A./D.G.A.)
2016 to 2051



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Source: Watson & Associates Economists Ltd.

4.5 Observations

Over the forecast horizon, it is anticipated that the County's two Primary Settlement Areas (Growth Centres), as well as its Secondary Settlement Areas, hamlets and remaining rural areas, will all continue to experience housing growth. The Urban Settlement Area of Paris, located in the northern portion of the County just outside the City of Brantford, is anticipated to accommodate a large portion of the County's population growth (60%) over the long-term planning horizon. The Urban Settlement Area of St. George is anticipated to accommodate approximately one-fifth of the County's population growth (20%), while the Rural System is also anticipated to accommodate one-fifth of the County's population growth (20%). A lack of municipal water servicing is expected to limit future residential development within the County's Secondary Settlement Areas and Hamlet Areas.

Over the forecast horizon, it is anticipated that the County will become increasingly more urban. As of 2016, approximately 42% of the County's population is within the Urban System, while 58% of the County's population is within the Rural System. Looking forward, it is anticipated that by 2051, approximately 58% of the County's



population base will be concentrated within the Urban System, which includes Paris and St. George. It is anticipated that the Urban System within the County will accommodate an additional 16,800 persons by 2051. As a comparison, this growth increment is greater than the estimated Urban System population base as of 2016 (2016 population within the Urban System is estimated at 16,000). It is anticipated that the County's Urban Settlement Areas will play an increasing role in broadening future housing options available within the County with respect to housing by structure type. Chapter 5 explores the urban land requirements to accommodate future urban growth within the existing settlement boundaries of the Urban Settlement Areas.

It is recommended that the County target a higher intensification rate of 20% of housing growth within the B.U.A. The B.U.A. in Paris, and to a lesser extent, St. George offers an opportunity to accommodate a wide range of housing options (low, medium, and high density). As well, the active planning applications/approved developments suggest that the County can achieve at least 48 units annually in the B.U.A.



Chapter 5

Community Area Land Needs Assessment



5. Community Area Land Needs Assessment

5.1 Introduction

5.1.1 L.N.A. Methodology

As previously discussed in Chapter 2, the Minister formally issued the final L.N.A. methodology on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.¹ Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019 to assess the quantity of land required to accommodate forecast growth.

As previously discussed, the L.N.A. methodology identifies that the results of a land needs assessment can only be implemented through an M.C.R. As previously stated, an M.C.R. is a new O.P. or an O.P.A. initiated by an upper- or single-tier municipality under section 26 of the *Planning Act*, which comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas within the urban system including **Community Areas** and **Employment Areas**. It is important to recognize that the provincial L.N.A. methodology focuses on the urban system, where there are settlement areas with servicing and urban amenities that support the growth management policies of the Growth Plan.

Provided below is a summary of the two areas that are reviewed for land requirements.

“Community Areas: Areas where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment land employment jobs. Community areas include delineated built-up areas [B.U.A.] and the designated greenfield area [D.G.A.] (excluding employment areas).

Employment Areas: Areas where most of the employment land employment (employment in industrial-type buildings) jobs are, as well as some office jobs and some population-related jobs, particularly those

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



providing services to the employment area. Employment areas (including prime employment areas) may be located in both delineated built-up areas [D.G.A.] and the designated greenfield area [D.G.A].”

This chapter reviews the Community Area land needs within the Urban System (Paris and St. George), specifically the D.G.A. portion of the Community Area, as identified in light purple in Figures 5-1 and 5-2.

Figure 5-1
County of Brant
Paris D.G.A.

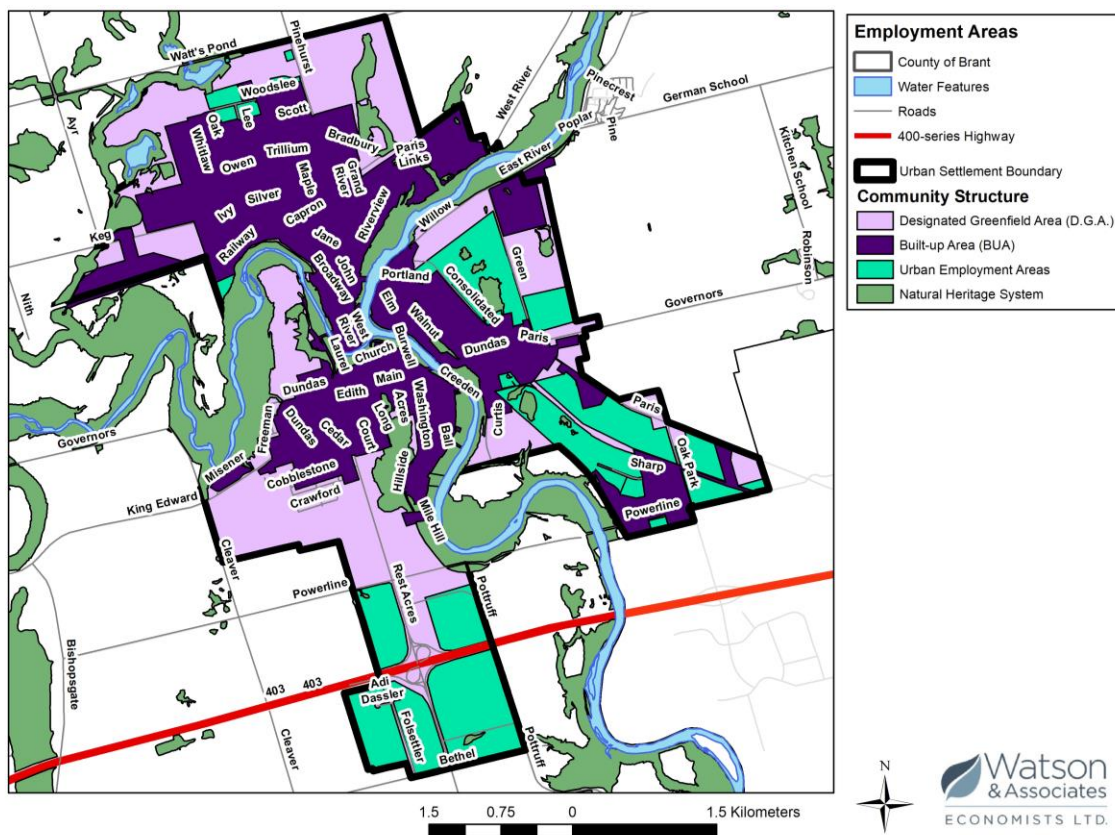




Figure 5-2
County of Brant
St. George D.G.A.



In total, the L.N.A. methodology provides six key components in establishing Community Area land needs. The previous chapters form the first five components of the L.N.A. for Community Area land needs. This chapter summarizes the last component of the L.N.A. for Community Area land needs. It should be noted that the population-related employment (P.R.E.) component of the L.N.A. for Community Area land needs is summarized in this chapter. More details on P.R.E. are provided in Chapter 6 within the context of the broader discussion of the County's employment forecast and employment growth allocations.



5.2 Designated Greenfield Area Land Supply

5.2.1 D.G.A. Land Supply Methodology

The provincial L.N.A. methodology requires an assessment of land needs be carried out based on the calculation of the total D.G.A. gross developable land area in accordance with the Growth Plan, 2019. The first step in calculating the D.G.A. land supply is to identify the total gross developable land within the Community Area D.G.A., as well as lands that support the function of this area, including non-residential lands (e.g., lands that accommodate P.R.E.), local roads, parks/trails, recreational lands/facilities and local infrastructure (e.g., stormwater ponds). Environmental features identified as Natural Heritage System in the County's mapping are excluded from the land supply. Other exclusions include the land area accommodating highways, utility corridors and cemeteries, as these land features support the broader area. County of Brant geographic information systems (G.I.S.) data was utilized to calculate the land supply.

It is important to recognize that the D.G.A. land supply includes developed and vacant lands and, therefore, requires an analysis to determine the total amount of population and P.R.E. the D.G.A. can accommodate at its fully developed state or by 2051. The people and jobs density is a key component in determining the yield of population and employment the D.G.A. can support by 2051.

5.2.2 D.G.A. Land Supply by Status

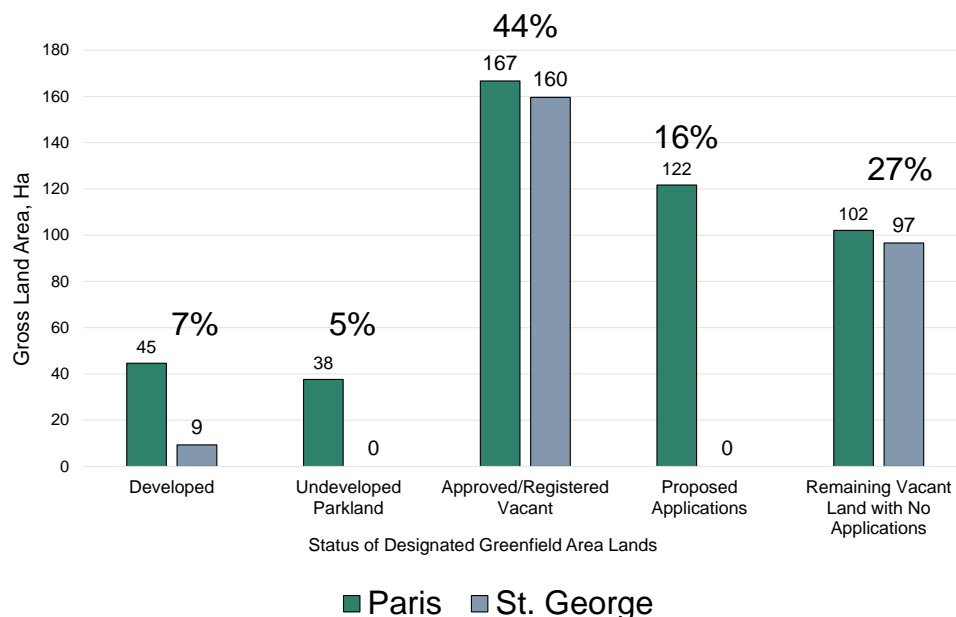
Figure 5-3 provides a summary of the D.G.A. land supply by status, while Appendix D provides detailed mapping of the D.G.A., identifying the approximate land area of the D.G.A. in large D.G.A. blocks. This analysis was carried out in January 2020, based on a comprehensive review of building permit data and active applications. Again, it is important to note that the land needs assessment is based on total designated land area and total people and jobs at 2051; therefore, updating the base to reflect new growth and development is not necessary. This analysis is used primarily to understand density.

As identified in Figure 5-3, the County has 739 ha of D.G.A. lands. Approximately 54 ha or 7% of the D.G.A. is developed, while 327 ha or 44% of the land area is anticipated to accommodate approved developments (registered and draft approved). These two status categories, represent just over half (51%) the D.G.A. land category and provide



greater certainty with respect to calculating the average forecast residential density and population yield. The remaining vacant D.G.A. lands provide a greater opportunity to adjust average density levels and include lands with proposed development applications (16%), lands with no applications (27%), and undeveloped parkland (5%).

Figure 5-3
County of Brant
D.G.A. Land Supply by Status, January 2020



Note: Proposed applications exclude conversion requests.

Source: Watson & Associates Economists Ltd. based on County of Brant planning application developed.

5.2.3 Developed and Approved Developments in the D.G.A.

As previously mentioned, approximately 54 gross ha of D.G.A. lands within the County are developed. As summarized in Figure 5-5, these developed lands accommodate approximately 2,100 people and jobs and generate an average density of 39 people and jobs/gross ha. Density ranges from 35 to 57 people and jobs/ha in D.G.A. neighbourhoods. The Paris Sport Centre has a density of 12 jobs/ha. Overall, the D.G.A. in Brant is tracking close to the Growth Plan density target of 40 people and jobs/ha by 2051.



Figure 5-5a
 County of Brant
 Paris and St. George
 Developed D.G.A. Land Area, ha, January 2020

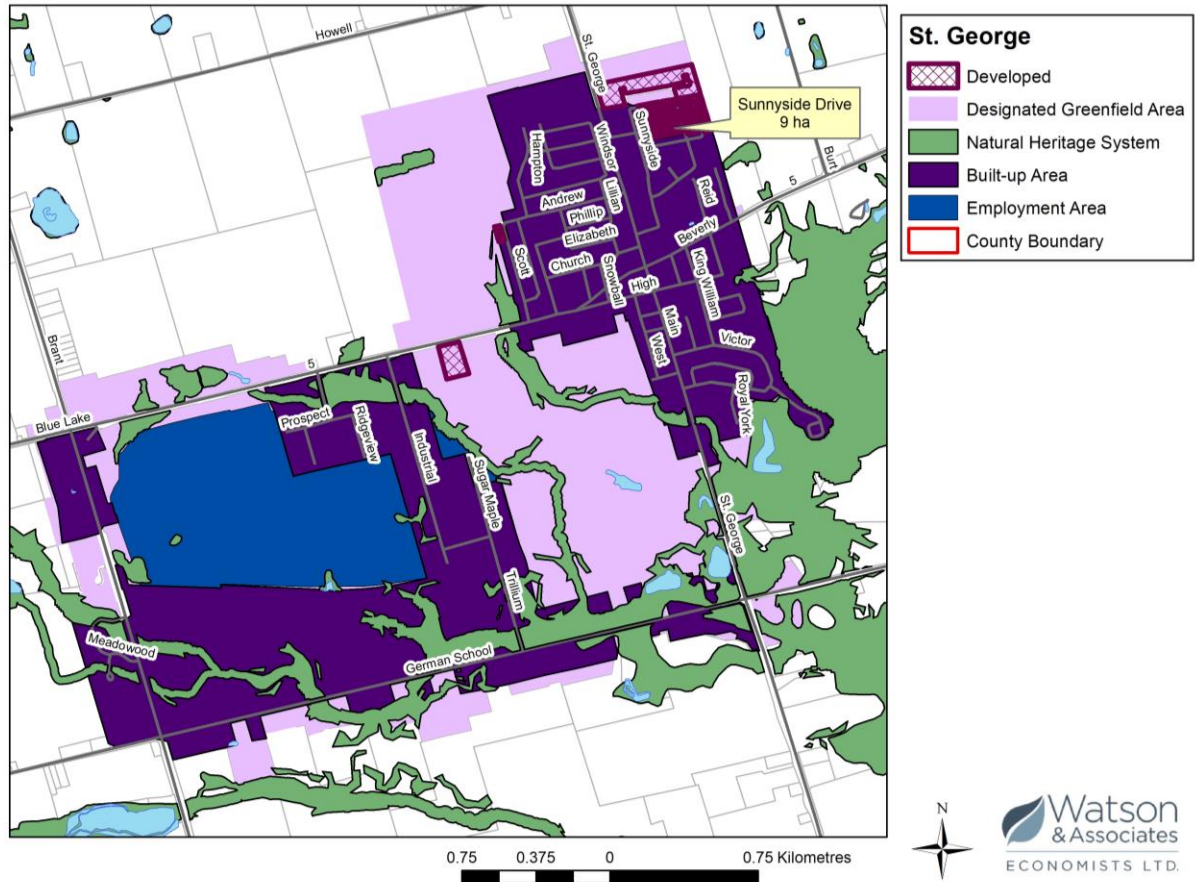
Subdivision Name	Location Description	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units	Total People and Jobs	Total Gross Land Area (ha)	People and Jobs Density (p&j/ha)
Paris - Brookfield Subdivision - Phase 1	Paris - North	68	67	0	135	455	8	57
Freeman St./Farrugie St.	Paris - West	44	0	0	44	176	4	50
Cobblestone/Grandview (North of Arlington Parkway)	Paris - South	120	32	0	152	753	21	36
Mile Hill	Paris - West	57	0	0	57	223	6	35
Riverview	Paris - East	23	0	0	23	86	2	44
Paris Sports Centre	Paris - South	0	0	0	0	45	4	12
Total Paris		312	99	0	411	1,738	45	39
Sunnyside Drive	St. George - North	105	0	0	105	365	9	39
Total St. George		105	0	0	105	365	9	39
Total County of Brant D.G.A.		417	99	0	516	2,103	54	39

Source: Watson & Associates Economists Ltd.

The following figures provide a map of the developed D.G.A. lands relative to the rest of the D.G.A. As shown, most of the D.G.A. lands, especially within St. George, are undeveloped.



Figure 5-5c
County of Brant
St. George
Developed D.G.A. Land Area, ha, January 2020



Based on a review of approved developments in the D.G.A., the County is anticipated to exceed the Growth Plan target. Based on what is currently developed and what is approved, the County is anticipated to reach a density of 52 people and jobs/ha, as summarized in Figure 5-6, which represents approximately 51% of the D.G.A. land area. The developed and approved lands are anticipated to accommodate 6,540 housing units and a people and jobs base of 19,600 by 2051.



Figure 5-6
County of Brant
Paris and St. George
Developed and Approved Yields on D.G.A. Lands, January 2020

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	417	99	0	516	54	1,620	2,100	39
Draft Approved/Registered	3,669	844	1,511	6,024	326	16,950	17,500	54
Developed & Draft Approved/Registered	4,086	943	1,511	6,540	380	18,570	19,600	52

Source: Watson & Associates Economists Ltd.

Appendix D provides additional mapping identifying lands with approved and proposed developments, as well as a breakdown of the above figure for Paris and St. George.

5.3 D.G.A. Land Needs

5.3.1 D.G.A. Housing and Employment Growth Forecast to 2051

Figure 5-7 provides the housing, population and employment forecast for Paris and St. George. Key highlights include:

- The D.G.A. at 2051 is anticipated to add approximately 4,680 units, bringing the total units in the D.G.A. to 5,190 units by 2051. This is less growth than the previously discussed active development pipeline, which has the potential to accommodate an additional 6,020 units. The difference is largely due to long-term demand considerations. It is recommended that the County monitor the rate of growth and review servicing constraints in St. George, and consider any adjustments by the next M.C.R.
- By 2051, it is anticipated that the D.G.A. will accommodate a population base of 14,100 persons, just under a quarter (24%) of the County's population base by 2051.



Figure 5-7
County of Brant
Paris D.G.A.
Housing and Population Forecast by 2051

Year	Population (Including Census Undercount)	Households			
		Low Density	Medium Density	High Density	Total
2020	1,300	310	100	0	410
2051	9,900	2,405	605	630	3,640
2020-2051	8,600	2,095	505	630	3,230

Source: Watson & Associates Economists Ltd.

Figure 5-8
County of Brant
St. George D.G.A.
Housing and Population Forecast by 2051

Year	Population (Including Census Undercount)	Households			
		Low Density	Medium Density	High Density	Total
2020	400	105	0	0	105
2051	4,200	1,050	120	385	1,555
2020-2051	3,800	945	120	385	1,450

Source: Watson & Associates Economists Ltd.

Figure 5-9
County of Brant
St. George and Paris
Housing and Population Forecast by 2051

Year	Population (Including Census Undercount)	Households			
		Low Density	Medium Density	High Density	Total
2020	1,700	415	100	0	515
2051	14,100	3,455	725	1,015	5,195
2020-2051	12,400	3,040	625	1,015	4,680

Source: Watson & Associates Economists Ltd.



5.3.2 Community Area Employment in the D.G.A.

Over the forecast, it is assumed that 1 P.R.E. job is required for every 4.5 residents in the D.G.A. Compared to the B.U.A., fewer P.R.E. jobs relative to the population base are anticipated on D.G.A. lands. Work at home employment is forecast to represent a larger component of P.R.E. in the D.G.A. compared to the B.U.A. The D.G.A. currently has a small commercial and institutional base (less than 500 jobs) on which to build. Further, based on a review of commercial site opportunities within the B.U.A., there are significant opportunities for new commercial development on vacant sites, as well as an opportunity for intensification. The majority of P.R.E. has been allocated to the B.U.A. at approximately 60%. This is discussed further in Chapter 6. By 2051, it is forecast that approximately 3,100 jobs will be accommodated within the D.G.A.

5.3.3 D.G.A. Land Needs to 2051

Figure 5-10 identifies the Community Area land needs for Paris and St. George. Key highlights include the following:

- As summarized in Figure 5-10, the County is anticipated to accommodate a population and employment base in the D.G.A. of 17,200 by 2051.
- As previously discussed, the County is anticipated to achieve a density of 50 people and jobs/ha by 2051, based on a review of existing development and approved development applications.
- The D.G.A. has a supply of 739 gross ha of developable land, which is greater than the land requirement of 344 gross ha to accommodate 17,200 people and jobs. As a result, the County is estimated to have a surplus of Community Area land of approximately 395 gross ha.



Figure 5-10
County of Brant
Paris and St. George
Community Area Land Needs to 2051

Community Area Land Needs		Paris D.G.A.	St. George D.G.A.	Total D.G.A.
Total D.G.A. Population and Employment Forecast at 2051	A	12,100	5,100	17,200
People and Jobs Density/gross ha	B	50	50	50
Land Requirement, gross ha	$C = A / B$	242	102	344
Total D.G.A. Land Area, gross ha	D	473	266	739
Land Surplus at 2051, gross ha	$E = D - C$	231	164	395

Source: Watson & Associates Economists Ltd.

5.3.4 Excess Community Area Lands

As previously discussed, the County has a surplus of 395 ha of D.G.A. Community Area lands. Figures 5-11 and 5-12 are maps that identify the excess lands in Paris and St. George. It is important to note that the maps identify large tracts of lands (larger than 5 ha) that are considered excess.

As identified on Figure 5-11, the excess lands within Paris primarily include D.G.A. Community Area lands designated Urban Residential that are vacant with no approvals in place (e.g., registered unbuilt and draft approved), totalling 187 ha.

D.G.A. Community Area lands designated Commercial along the Paris Road corridor are considered excess, totalling 14 hectares. Chapter 6 provides a further discussion on the commercial land needs. As discussed in that Chapter, Paris has an estimated surplus of 31 ha of designated commercial lands. Figure 5-11 does not identify all excess D.G.A. Community Area lands that are designated Commercial. It is important that the County retain some surplus commercial lands to support a range of commercial options for residents across Paris.

D.G.A. lands identified as excess in St. George include all D.G.A. lands outside approved development site areas. As previously discussed, St. George has a municipal servicing constraint.



These excess lands are not considered to be needed until the post-2051 period and will be subject to ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered interchangeable with the identified shortfall of Urban Employment Areas discussed in Chapter 6. It is recommended that the County's new O.P. identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.

Figure 5-11
County of Brant
Paris
D.G.A. Community Area Excess Lands to 2051

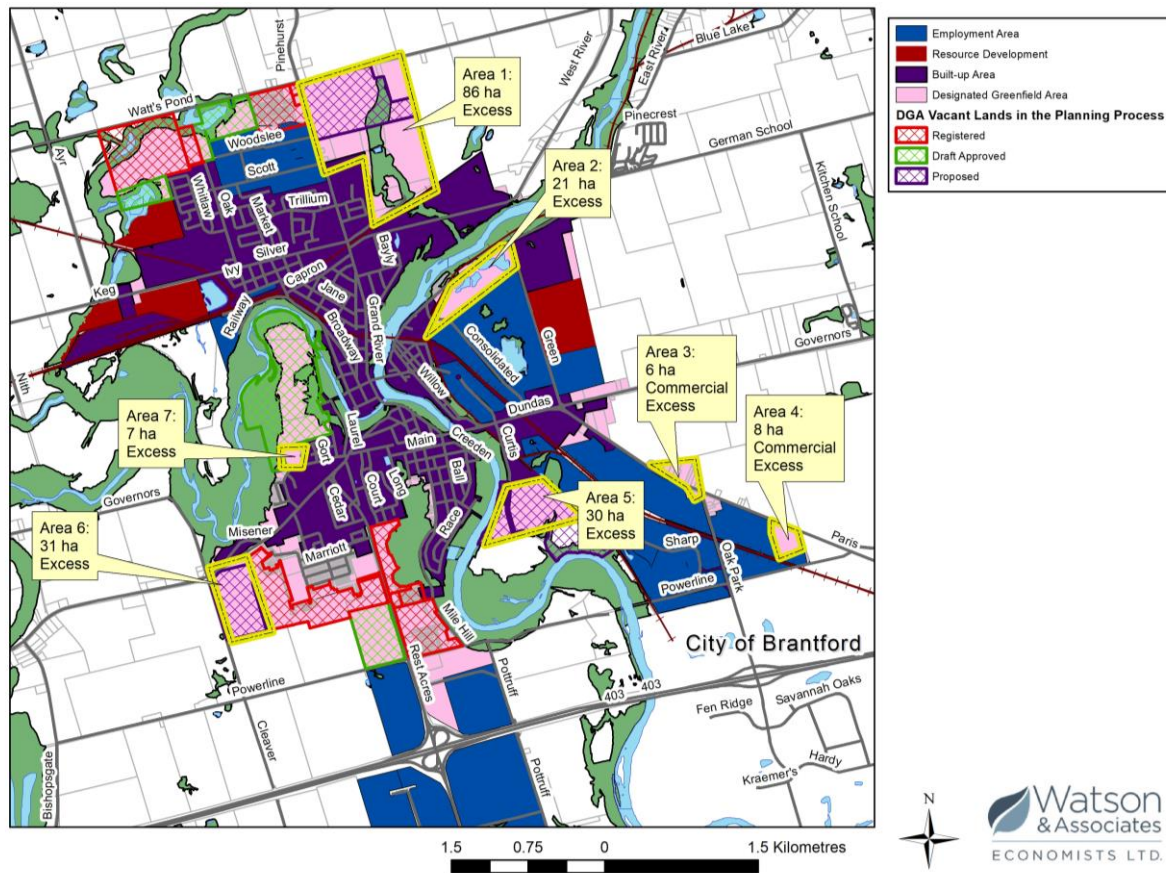
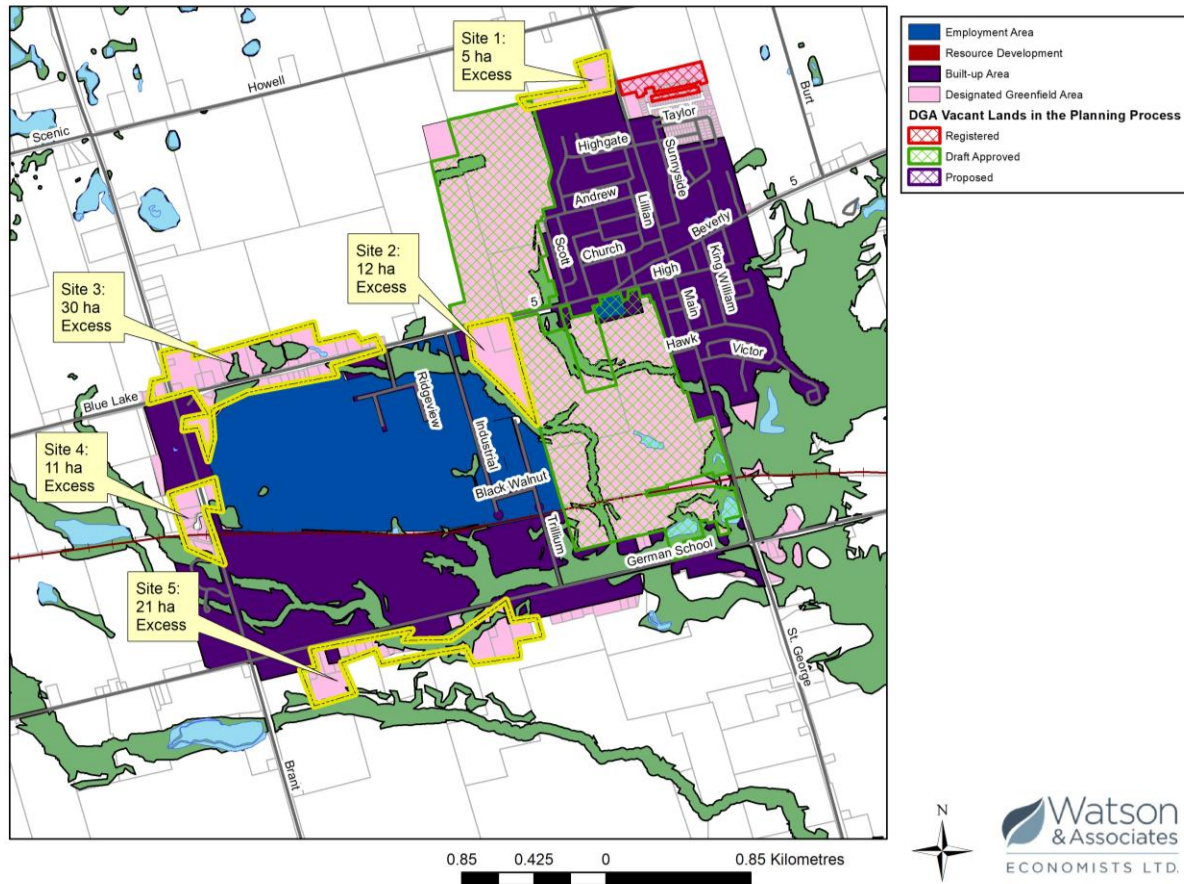




Figure 5-11
County of Brant
St. George
D.G.A. Community Area Excess Lands to 2051



5.3.5 Observations

The County has a robust supply of potential housing development in the planning approvals process (i.e., development pipeline). The County's supply of housing in the development pipeline is anticipated to accommodate a greater range of housing options compared to the existing D.G.A. base.

Based on the comprehensive analysis carried out herein, it has been determined that the County has a surplus of Community Area land of approximately 395 gross ha to 2051. These surplus lands are not considered to be needed until the post-2051 period, and will be subject to ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered



interchangeable with the identified shortfall of Urban Employment Areas discussed in Chapter 6. It is recommended that the County's new O.P. identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.



Chapter 6

Employment Analysis



6. Employment Analysis

6.1 Introduction

This chapter provides an assessment of historical and forecast employment growth trends for the County of Brant to the year 2051 within the broader context of the G.G.H. and the Province of Ontario, based on recent Statistics Canada data as well as other available information sources. A commentary is also provided on key drivers and disruptors anticipated to impact employment and shape the development patterns of the Commercial and Employment Areas of the County's Urban System. This review has been prepared to provide insight with respect to the County's long-term employment forecast to 2051 by employment category, and ultimately by location (Urban Employment Area, Urban Community Area, Rural Employment Area and Remaining Rural Area). The employment forecast is further allocated by the Primary Settlement Areas (Urban System) and Rural System in this chapter, and Employment Area land needs are provided.

6.1.1 Employment Land-Use Categories

The long-term employment forecast prepared herein includes a breakdown of employment by category, including P.R.E., urban employment lands employment (E.L.E.), rural E.L.E. and other rural employment. These employment categories, as defined by the Province, are generally based on built-form and land-use characteristics. The majority of the County's industrial sector employment is accommodated in industrial-type buildings, referred to as E.L.E. The County's commercial and institutional sector employment is generally accommodated in commercial and institutional-type buildings, referred to as P.R.E. Given the importance and relative magnitude of E.L.E. within the County's rural areas, this report further breaks down E.L.E., as urban E.L.E. (employment within Primary Settlement Areas (Growth Centres)) and rural E.L.E. (employment outside Primary Settlement Areas (Growth Centres)).

The following is a summary of the employment categories in accordance with the provincial L.N.A.



6.1.1.1 Urban Population-Related Employment (P.R.E.)

Urban P.R.E. includes employment in institutional and commercial sectors not accommodated within industrial-type buildings (E.L.E.). Commercial and institutional sector employment in industrial-type buildings (e.g., retail tenant in a multi-tenant industrial building) represents a small share of the County's E.L.E. Work at home employment is also captured as P.R.E. within the County of Brant. Urban P.R.E. is located within the County's Primary Settlement Areas (Growth Centres) and is largely accommodated in downtown cores, commercial nodes and corridors along arterial roads, neighbourhood plazas, schools, and standalone institutional and retail buildings.

6.1.1.2 Urban Employment Lands Employment (E.L.E.)

Urban E.L.E. represents jobs accommodated in industrial-type buildings within Primary Settlement Areas (Growth Centres). This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities as well as a limited amount of employment associated with office commercial and employment-supportive uses. E.L.E. includes a very small portion of employment in the commercial and institutional sectors.

6.1.1.3 Rural Employment Lands Employment (E.L.E.)

Rural E.L.E. represents jobs accommodated in industrial-type buildings outside of Primary Settlement Areas (Growth Centres). This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities as well as a limited amount of employment associated with office commercial and employment-supportive uses. Rural E.L.E. is predominantly comprised of industrial sector employment, with a small portion of commercial and institutional employment accommodated in rural industrial-type buildings, referred to as rural E.L.E.

6.1.1.4 Other Rural Employment

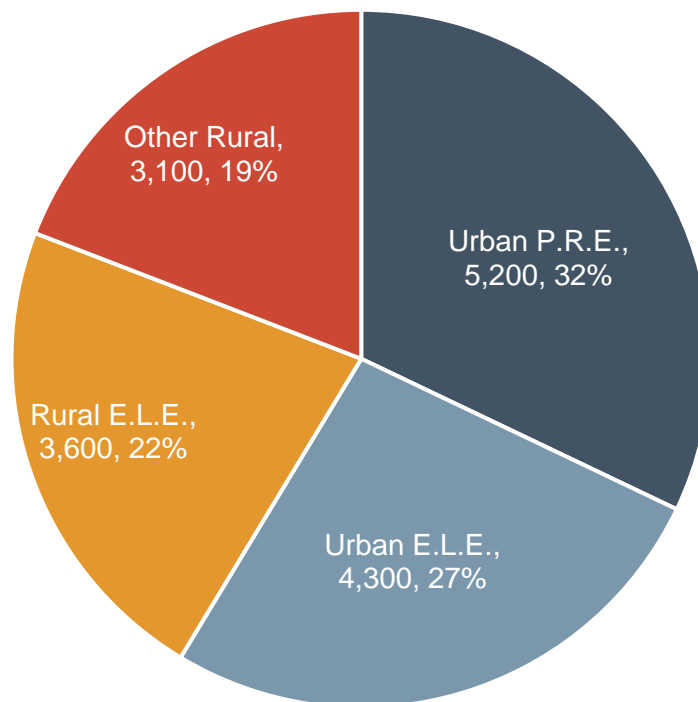
Other rural employment includes employment within the Rural System that is not E.L.E., such as employment in agriculture, resource development, work at home, recreation/ tourism and P.R.E.



6.1.1.5 Summary of Employment by Category, 2021

The County's employment base is estimated at 16,100 jobs as of 2021. Figure 6-1 provides a breakdown by the employment categories previously discussed. As summarized in Figure 6-1, urban P.R.E. accommodates the largest share of employment at 32%, followed by urban E.L.E. at 27%, rural E.L.E. at 22% and other rural at 19%.

Figure 6-1
County of Brant
Employment by Category, 2021



Source: Watson & Associates Economists Ltd., 2021.

6.1.2 Employment by Location Type

The forecast to 2051 includes a further breakdown of employment with respect to employment by geographic location.



6.1.2.1 Urban System

As previously mentioned, within the County's Urban System, employment is grouped into two broad categories: Urban Employment Areas and Urban Community Areas. The Urban System accommodates 59% of the County's employment base. The categories by geographic location are provided below.

Urban Employment Areas

Urban Employment Areas include predominantly E.L.E. in industrial-type buildings. Urban Employment Areas are clusters of industrial and export-based activities, identified in the County O.P. as lands designated as Employment in Paris and St. George. These areas are to be protected from sensitive uses, such as residential, specific institutional uses (e.g., schools, daycares and places of worship) and major retail uses.¹ While Urban Employment Areas are intended to serve industrial-type or export-based activities, Urban Employment Areas do permit some P.R.E. type uses, including employment in commercial and institutional-type buildings. The existing County of Brant O.P. permits the following P.R.E.-type uses: public self-storage; motor vehicle body shops; offices; medical/dental clinics; research facilities; and commercial uses that serve the industrial area, such as restaurants. Commercial uses that serve the industrial area, such as restaurants, daycare services and fitness centres are also permitted.²

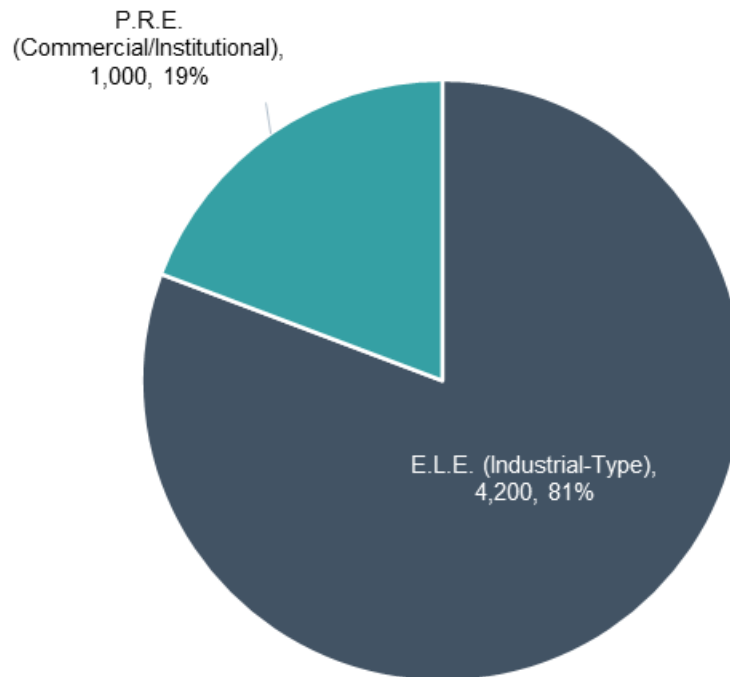
As summarized in Figure 6-2, it is estimated that Urban Employment Areas (located in Paris and St. George) accommodate 5,300 jobs and this employment base is comprised of 80% E.L.E. and 19% P.R.E. Urban Employment Areas in St. George are predominantly E.L.E. with approximately 60 P.R.E. jobs, while Paris Employment Areas have approximately 980 P.R.E. jobs. P.R.E. jobs in Paris Employment Areas include restaurants (e.g., Tim Horton's, Dominos and Mario's Pizza), a laundromat, a fitness centre, equipment rental/sales outlets, automotive repair centres and small office operations. Employment Areas in Paris also include place of worship uses which have a low employment yield. As previously discussed, provincial policy requires municipalities to plan Employment Areas that are protected from sensitive uses, such as place of worship facilities.

¹ Provincial Policy Statement, 2020, Definition of Sensitive Uses, p. 51.

² County of Brant Official Plan, 2012, policy 3.12.2, pp. 3-29 and 3-30.



Figure 6-2
County of Brant
Urban Employment Areas
Composition of Employment, 2021



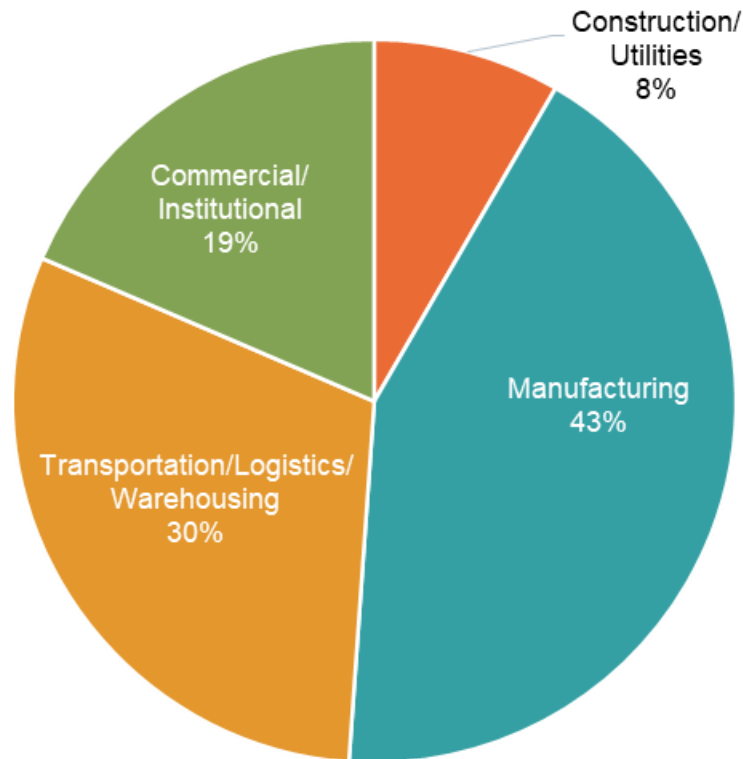
Source: Watson & Associates Economists Ltd.

With an estimated employment of 5,300, Urban Employment Areas comprise 33% of the County's employment base as of 2021.

Figure 6-3 provides further details on employment by sector within Urban Employment Areas. As summarized, manufacturing comprises 43% of the employment base in Urban Employment Areas, the largest sector. Transportation, logistics and warehousing represent the second largest share at 30%, followed by commercial/institutional employment at 19% and construction/utilities employment at 8%.



Figure 6-3
County of Brant
Urban Employment Areas
Employment by Sector, 2021



Source: Watson & Associates Economists Ltd., 2021.

Urban Community Area

The Urban Community Area includes all other lands not part of the Urban Employment Area within the Primary Settlement Areas (Growth Centres) of Paris and St. George. Non-residential uses in the Urban Community Area include those that serve the local trading area of the settlement area, as well as visitors to the area. Paris and St. George both have a downtown core, a key focal point of the community. The core area represents the largest cluster of commerce activity in the settlement area. In addition, Paris and, to a lesser extent, St. George have clusters of commercial development on lands designated General Commercial, Shopping Centre Commercial and Mixed Use. Generally, the largest retail uses are outside the downtown core areas. Institutional developments are accommodated on sites designated as Institutional in the County's O.P., as well as lands designated for residential use and commercial use.



Urban Community Areas represent 26% of the County's employment base as of 2021.

6.1.2.2 *Rural System*

Within the County's Rural System, employment is grouped into two broad categories, Rural Employment Areas and Other Rural. The Rural System accommodates 41% of the County's employment as of 2021. The categories by geographic location are provided below.

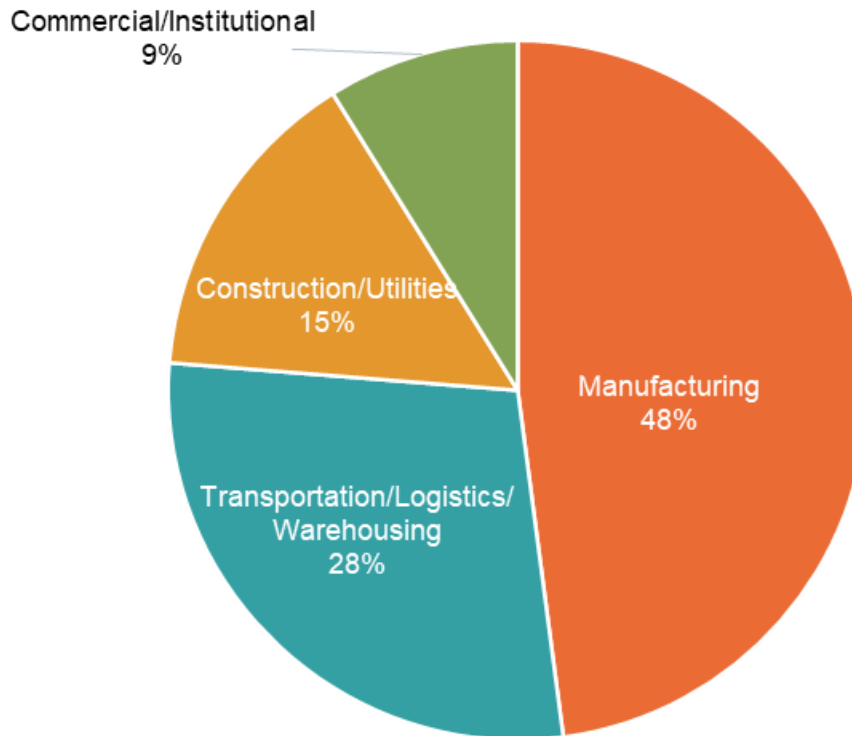
Rural Employment Area

Rural Employment Areas include predominantly E.L.E. in industrial-type buildings on lands with no municipal services. Rural Employment Areas are clusters of industrial and export-based activities. Similar to Urban Employment Areas, Rural Employment Areas accommodate some P.R.E. uses. Apart from fitness centres and daycare services, Rural Employment Areas accommodate the same P.R.E. uses as previously discussed for Urban Employment Areas. It is estimated that Rural Employment Areas accommodate 91% E.L.E. jobs and 9% P.R.E. jobs. As summarized in Figure 6-4, manufacturing employment represents nearly half (48%) the employment base in Rural Employment Areas, followed by transportation, logistics and warehousing at 28% and construction/utilities at 15%.

Overall Rural Employment Areas represent an important component of the County's employment base, representing 24% of the County's employment as of 2021.



Figure 6-4
County of Brant
Rural Employment Areas
Employment by Sector, 2021



Source: Watson & Associates Economists Ltd., 2021.

Other Rural Employment

Other Rural Employment includes all other lands outside Rural Employment Areas in the Rural System. Non-residential uses in this category include uses associated with primary sectors (e.g., agriculture, quarrying, etc.), commercial and institutional uses within Secondary Settlement Areas, Hamlets and a small base of industrial, commercial and institutional uses in the countryside. Other Rural Employment comprises approximately 17% of the County's employment base as of 2021.

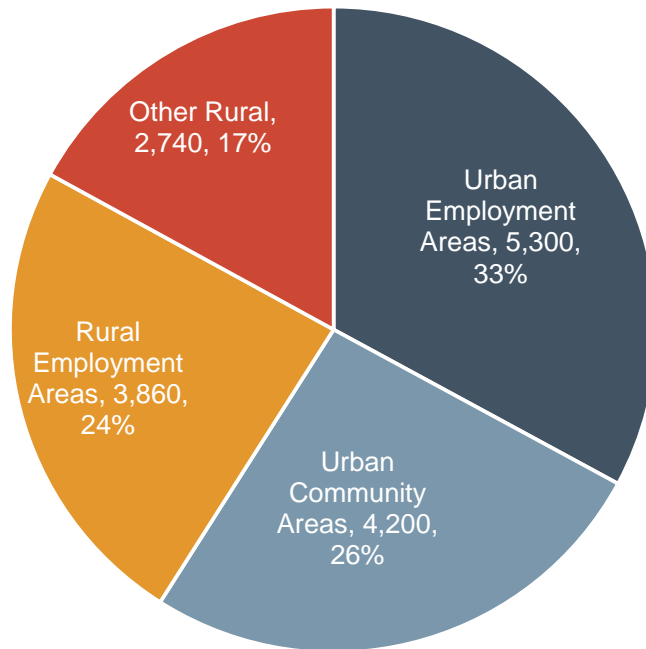
6.1.2.3 Summary of Employment by Location Type

As previously discussed, the County's employment base is estimated at 16,100 jobs as of 2021. Figure 6-5a provides a breakdown by the employment location types previously discussed. As summarized in Figure 6-5a, Urban Employment Areas



accommodate the largest share of employment at 33%, followed by Urban Community Areas at 26%, Rural Employment Areas at 24% and Other Rural at 17%.

Figure 6-5a
County of Brant
Employment by Location Type, 2021



Source: Watson & Associates Economists Ltd., 2020.



Figure 6-5b
County of Brant
Employment by Location Type and Location Type, 2021

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,300	0	0	5,300	33%
Urban Community Areas	4,200	0	0	0	4,200	26%
Rural Employment Areas	0	0	3,600	260	3,860	24%
Other Rural	0	0	0	2,740	2,740	17%
Total Employment	5,200	4,300	3,600	3,000	16,100	100%
Share (%)	32%	27%	22%	19%	100%	

Source: Watson & Associates Economists Ltd.

6.2 Macro-Trends, Disruptors and Employment Outlook

Following steady economic growth since the world economy rebounded from the 2008/2009 financial crisis, the world changed dramatically in 2020. The December 2019 outbreak of COVID-19 was officially declared a global pandemic by the World Health Organization (W.H.O.) on March 12, 2020, and has inflicted rising economic and human costs throughout the world. In response to the threat of further escalation associated with the spread of the virus, governments around the world have implemented quarantine and physical distancing practices in what has been referred to as the “Great Lockdown.”

To date, the downward impact of these containment measures on global economic output, commodity prices, and consumer spending has been severe. Economic sectors such as travel and tourism, accommodation and food, retail and personal services, manufacturing, energy, and finance have been hit particularly hard. On the other hand, many other employment sectors (particularly knowledge-based sectors), which are more adaptable to the current remote work environment have been less negatively impacted, and in some cases have prospered.

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 (refer to section 6.7.5 herein). Lastly, continued tensions and constraints related to international trade have also begun to raise further questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

At present, the level of sustained economic impact related to this “exogenous shock” to the world and Canadian economy is largely unknown. While the prospects for a global recovery have improved in recent months, the pace of this global economic recovery has been uneven, largely due to the rate at which countries have been able to vaccinate their residents.¹ Generally, it is clear that the longer COVID-19 persists on an international scale, the greater the severity of the current global downturn and prolonged disruption. In its latest World Economic Outlook, the International Monetary Fund (I.M.F.) baseline scenario estimates that the global economy contracted 3.5% in 2020 which represented a more significant economic contraction than what was experienced during the height of the 2008/2009 financial crisis.

For Canada’s largest trading partner, the U.S., real G.D.P. was estimated to contract by 3.4% in 2020 and is expected to rebound by 5.1% in 2021.² The recovery of the U.S. economy will largely depend on the U.S. administration’s response to dealing with the virus domestically, in conjunction with their approach to on-going international trade and protectionist policies.

6.2.1.1 Provincial Context

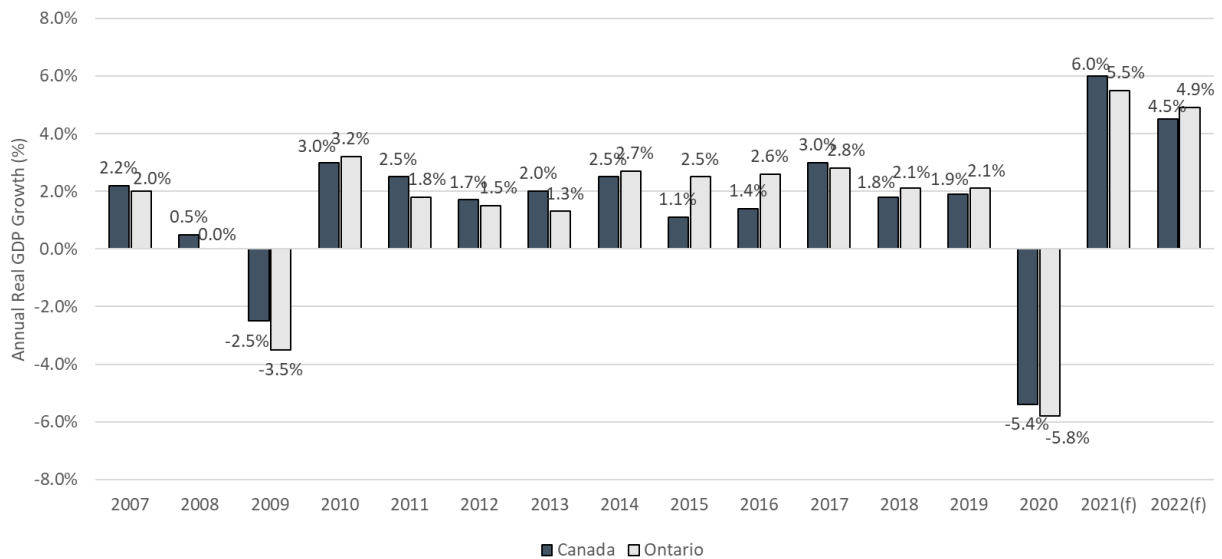
Over the past decade, the Canadian and Ontario economies have experienced relatively strong economic growth, as illustrated in Figure 6-6. While the recent performance of the national and Ontario economies has remained relatively strong over the past several years through to early 2020, the COVID-19 pandemic poses significant risks to the national and provincial economies which are important to recognize. As illustrated in Figure 6-6, the Ontario economy is estimated to have contracted by 5.8% in 2020, while G.D.P. growth is forecast to rebound by 5.5% in 2021. By 2022, BMO Capital Markets forecast the Ontario economy will continue its momentum, growing by 4.9%, while the overall Canadian economy is expected to grow by 4.5%.

¹ Global Government Forum. OECD Warns of Uneven Economic Recovery from COVID-19, Despite Global Growth. June 1, 2021.

² World Economic Outlook. International Monetary Fund. January 2021.



Figure 6-6
Ontario and Canada
Annual Real G.D.P. Growth
Historical (2007 to 2020) and Forecast (2021 to 2022)



Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, April 2021, by Watson & Associates Economists Ltd.
Note: 2020 (Ontario), 2021 and 2022 are forecast by BMO Capital Markets Economics.

Domestically, the Ontario housing market also continues to pose a risk to the overall provincial 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 G.T.H.A., has contributed to record consumer debt loads and eroded housing affordability.

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by G.D.P. output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector. Much of this shift has occurred during the past two decades, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. In contrast, service-based sectors such as financial and business services have experienced significant increases over the past several years.

While the manufacturing sector remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to

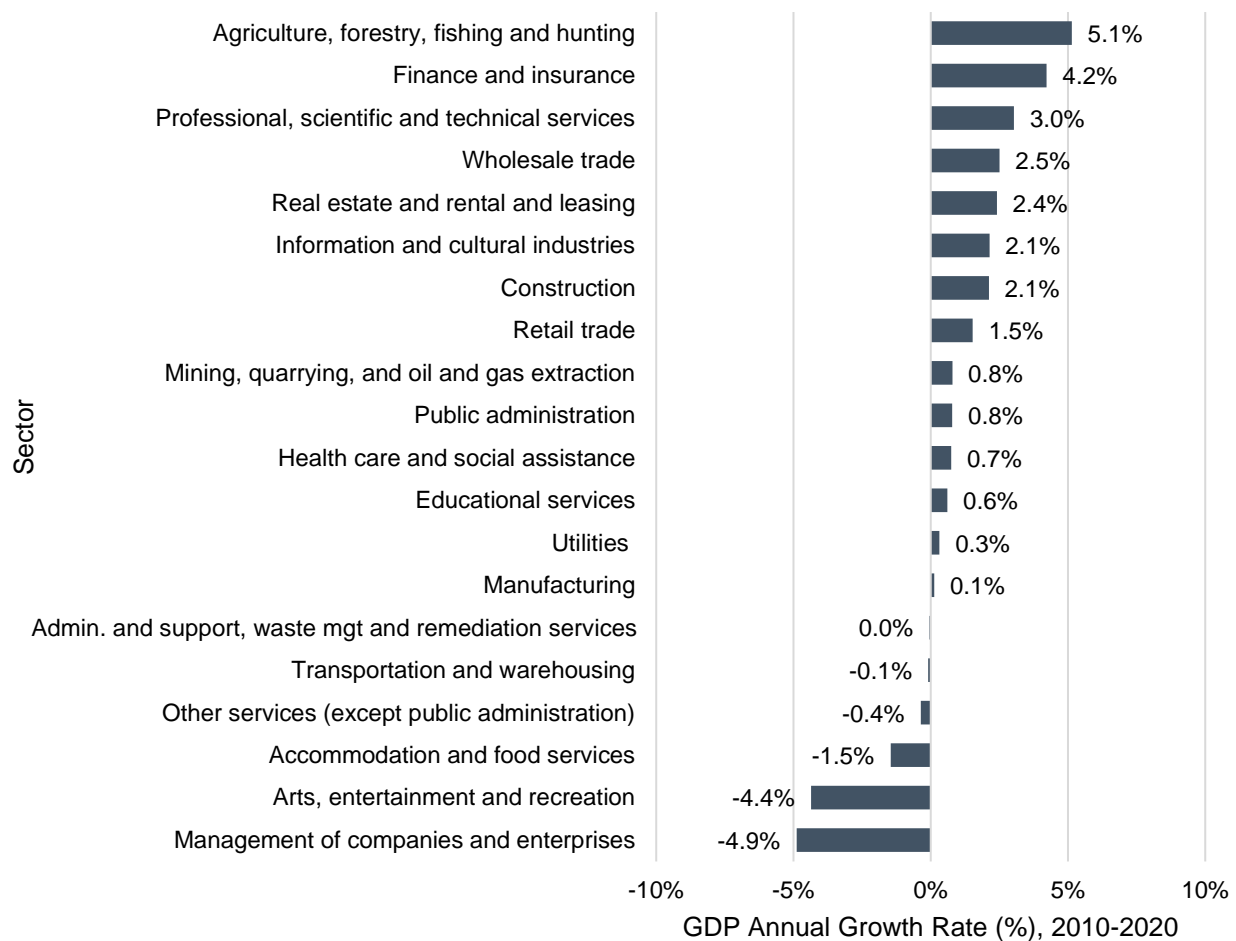


increased outsourcing of production processes to overseas manufacturers. Looking forward, there will continue to be a manufacturing focus in Ontario; however, industrial processes are anticipated to become increasingly more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

As summarized in Figure 6-7, a range of commercial, institutional, and industrial sectors have experienced increases in G.D.P. in Ontario over the past decade. G.D.P. growth has been particularly strong in agriculture, forestry, fishing and hunting, finance and insurance, wholesale trade, professional, scientific and technical services and real estate and rental and leasing. A number of knowledge-based sectors, including information and cultural industries and educational services, have experienced notable increases in G.D.P. Within the industrial sector, construction has also experienced significant increases in G.D.P. As previously discussed in Section 6.2, many sectors outside of knowledge-based sectors have been negatively impacted by COVID-19 which has resulted in lower levels of G.D.P growth or decline over the 10-year period. Some of these sectors include manufacturing, transportation and warehousing, accommodation and food services and arts, entertainment and food services which had strong growth to 2019.



Figure 6-7
Ontario
Change in Provincial G.D.P. by Sector, 2010 to 2020



Note: Based on chained 2012 dollars.

Source: Derived from Statistics Canada GDP by industry data, Table 36-10-0402-02, by Watson & Associates Economists Ltd.

As previously mentioned in Chapter 3, a key driver of the future economic potential for the County of Brant is its geographic location within Ontario. The County of Brant is located within the G.G.H., one of the fastest growing regions in North America. In many respects, the County of Brant's long-term population and employment growth potential is largely tied to the success of the G.G.H. as a whole.

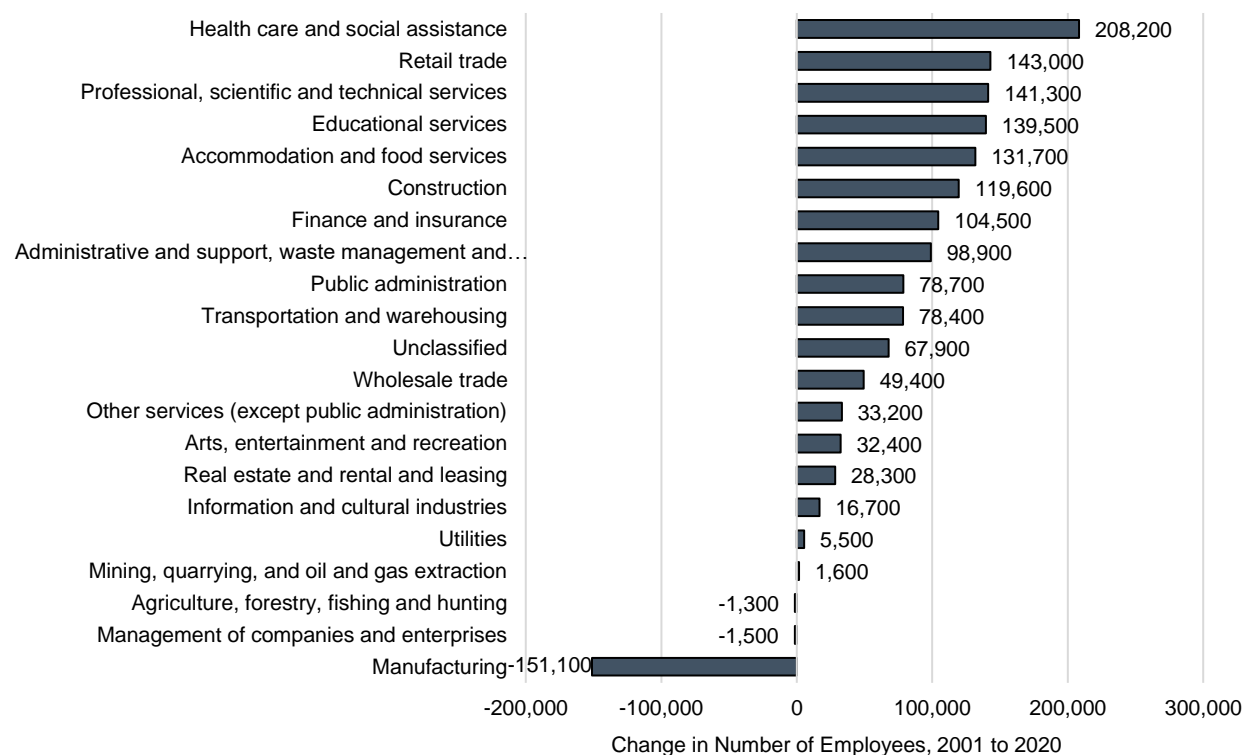
6.2.1.2 G.G.H. Trends

As summarized in Figure 6-8, total employment has grown by 37% within the G.G.H. from 2001 to 2020. While this region has experienced a large increase in service and



knowledge-based sectors, manufacturing and primary sectors have shown a decrease in the number of jobs within this period. It is noted, however, that the manufacturing sector has been experiencing a gradual recovery in recent years. With respect to employment, the sectors with the highest growth have been health care and social assistance, retail trade, professional, scientific and technical services, and education.

Figure 6-8
G.G.H.
Change in Employment, 2001 to 2020



Note: Includes employees only.

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

6.3 County of Brant Long-Term Employment Forecast to 2051

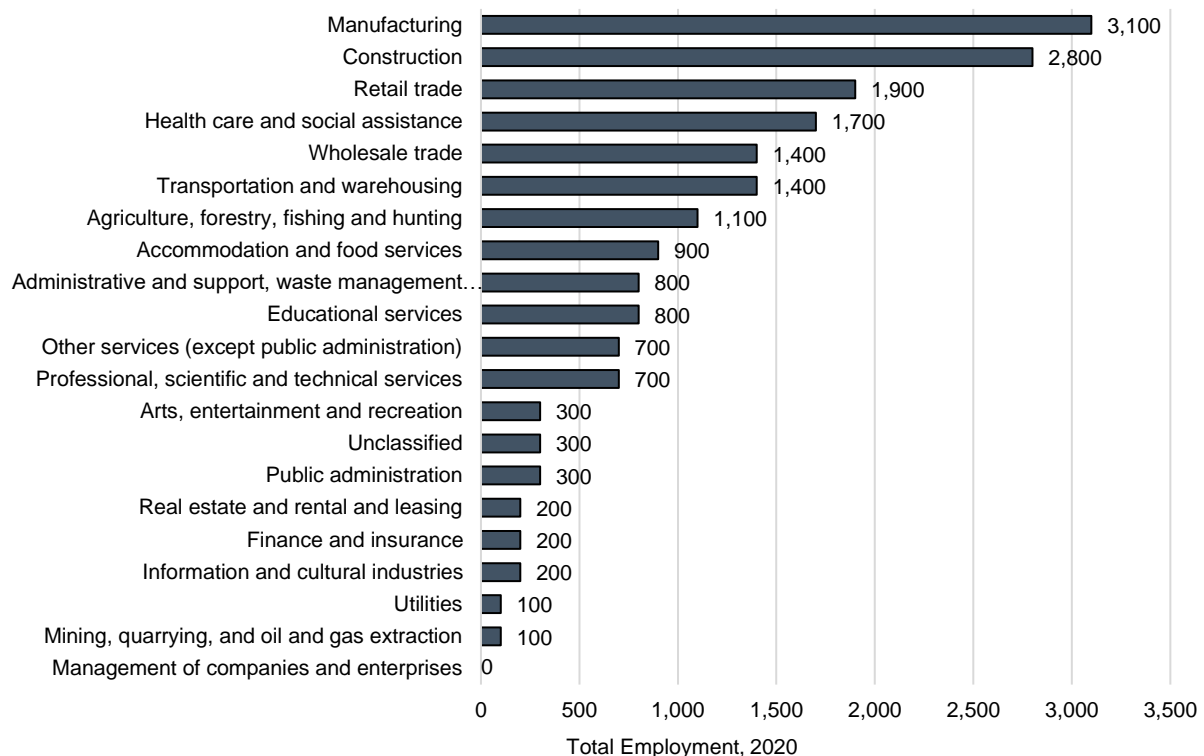
6.3.1 County of Brant Historical Employment Trends by Employment Sector

The County of Brant has a diverse employment base, as illustrated in Figure 6-9. The largest sector in the County is manufacturing which accommodates 3,100 jobs or 16%



of total employment. Other key sectors include construction; retail trade; health care, transportation and warehousing, and wholesale trade.

Figure 6-9
County of Brant
Employment by Sector, 2020



Note: Figure includes employed and self-employed jobs.
Source: Derived from EMSI data by Watson & Associates Economists Ltd.

Figure 6-10 summarizes the County's concentration of employment as a portion of its employment base relative to the Province. Sectors with a very high concentration of employment within the County relative to the Province are identified in purple, while sectors with a slightly higher concentration are identified in grey and sectors with a low concentration are identified in red. It is noted that all industrial sectors are more concentrated within the County relative to the Province.

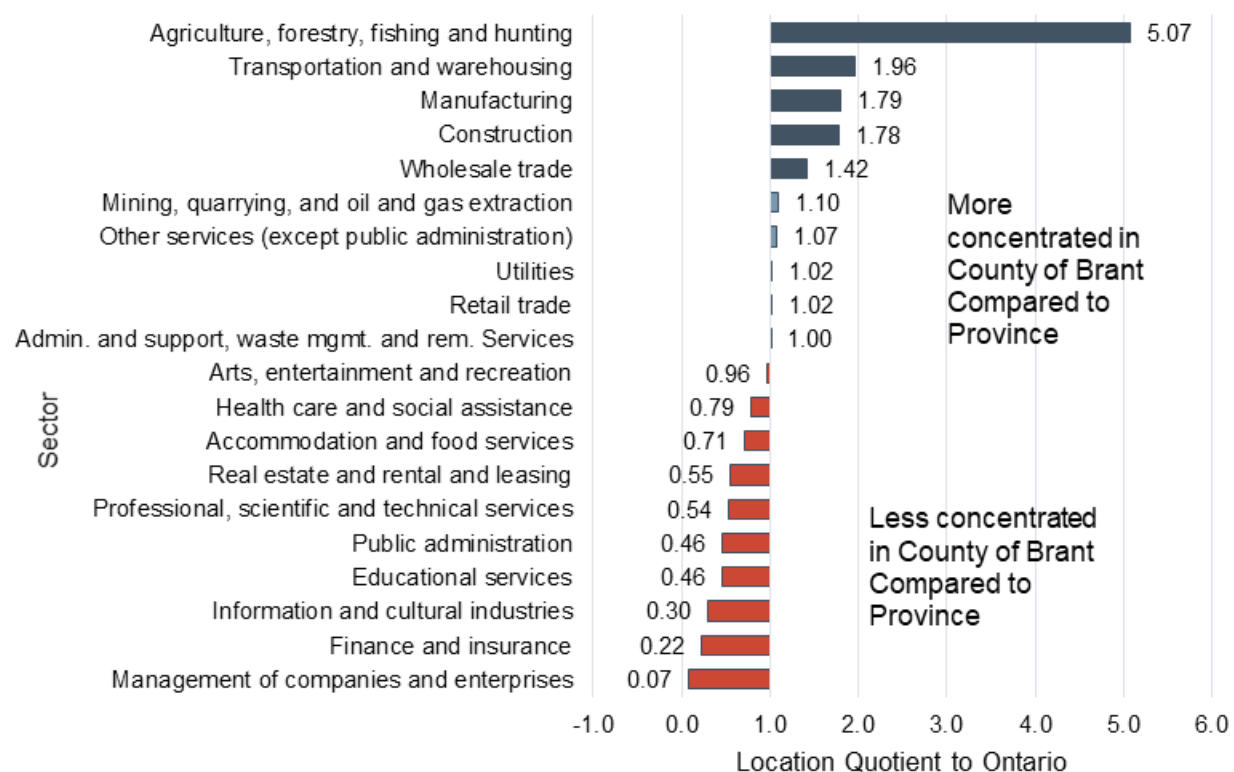
Agriculture, forestry, and fishing is estimated to be five times more concentrated within the County than in the Province, followed by transportation and warehousing, manufacturing, construction, and wholesale trade. Compared to the Province, within



the commercial and institutional sectors the County also has a slightly higher concentration in retail trade.

Employment sectors with a lower concentration of employment compared to the Province include a mix of commercial and institutional sectors, including public administration, office type sectors and commercial service sectors that serve the local and regional population.

Figure 6-11
County of Brant
Employment Base Relative to the Province of Ontario



Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2020.
Note: Figure includes employees.

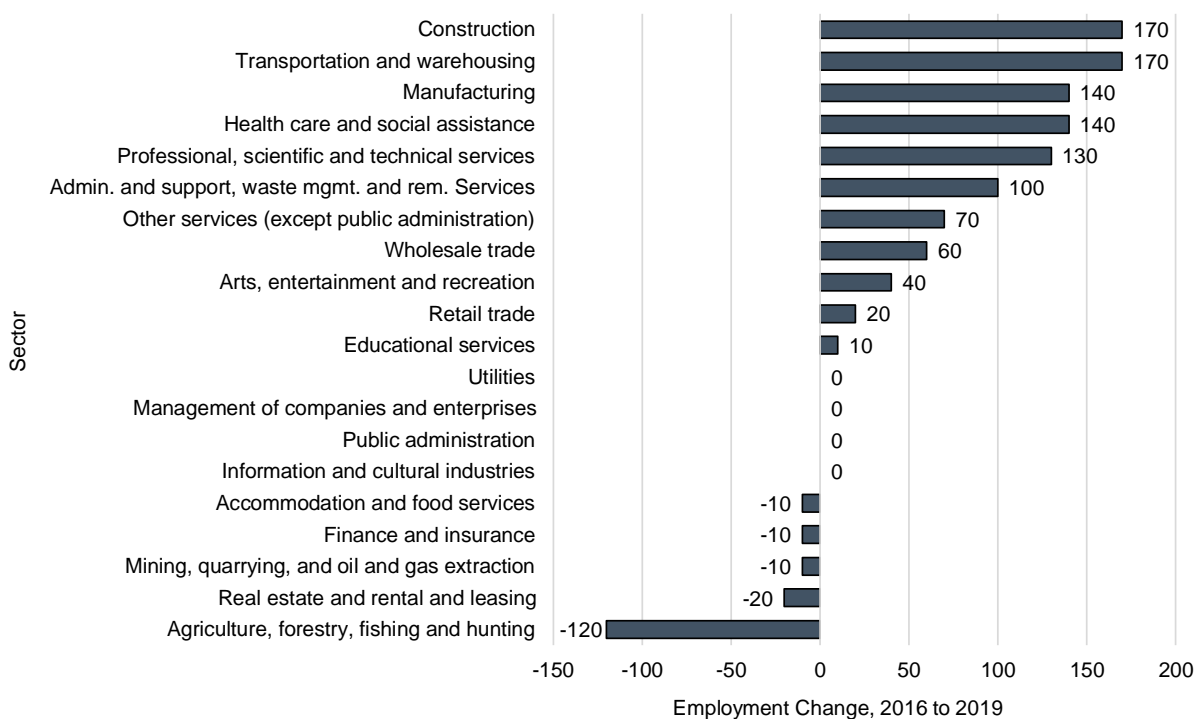
6.3.2 Change in Employment by Sector

In many respects, recent employment trends within County of Brant are similar to the broader trends experienced across the G.G.H. and the Province as a whole. As summarized in Figure 6-12, over the 2016 to 2019 period, the County of Brant added employment in several employment sectors, industrial sectors (construction, transportation and warehousing, manufacturing, and wholesale trade), and commercial



sectors (professional, scientific and technical services, arts and entertainment, and retail trade), and institutional sectors (health care and education).¹ The industrial sectors, as previously discussed, already had a strong presence in the County; however, the commercial and institutional sectors that did not have a strong presence have recently experienced substantial growth. Over the forecast horizon, it is anticipated that a number of these sectors will continue to grow based on the macro-trends and employment outlook previously discussed.

Figure 6-12
County of Brant
Change in Employment by Sector,
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.

6.3.3 County-Wide Employment Forecast to 2051

In accordance with Schedule 3 of the Growth Plan, 2019, the County of Brant employment base is forecast to reach 26,000 jobs by 2051. Based on the County's

¹ Based on OMAFRA EMSI Analyst data.



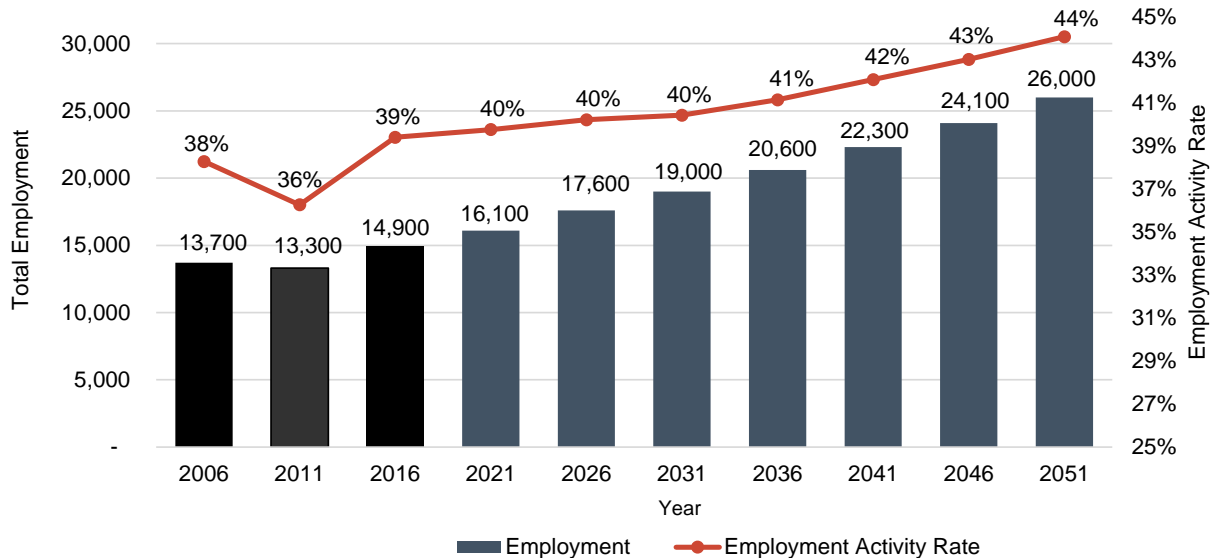
current employment base of 16,100 jobs as of 2021 and the Growth Plan, 2019 forecast of 26,000 jobs by 2051, the County of Brant is forecast to add approximately 9,900 jobs, an annual growth rate of 1.6%.

Figure 6-13 summarizes the long-term employment forecast for the County of Brant by total employment and employment activity rate in comparison to recent historical trends. The County's employment activity rate (ratio of jobs to population) has increased slightly since 2001. Over the long term, the County's employment activity rate is anticipated to increase from approximately 39% in 2016 to 44% by 2051. This moderate increase is anticipated to be largely driven by opportunities within the County's export-based employment sectors (e.g., transportation, wholesale trade, construction, small-scale to mid-sized manufacturing, and agri-business). There is also employment growth potential within P.R.E. sectors such as retail, accommodation and food, professional, scientific and technical scientific services, and health care. Growth within these P.R.E. sectors is anticipated to be driven by population growth within the County's Primary Settlement Areas (Growth Centres).

A large percentage of forecast job growth is anticipated to be accommodated through home occupations, home-based businesses and off-site employment, accounting for approximately 25% of employment growth over the 2016 to 2051 period. This employment generally does not directly generate significant additional demand for urban land.



Figure 6-13
County of Brant
Employment Forecast 2051



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.

6.3.4 County-wide Employment by Employment Category, 2016 to 2051

Figures 6-14 and 6-15 summarize the forecast by employment category (Urban P.R.E., Urban E.L.E., Rural E.L.E. and Other Rural). The following provides a summary with respect to the long-term employment outlook by employment category for the County from 2016 to 2051.

6.3.4.1 Urban P.R.E.

Urban P.R.E., as previously discussed, includes employment in institutional and commercial sectors within the Primary Settlement Areas (Growth Centres) including retail, personal services, accommodation and food, health and social services, education, and other services.

- Urban P.R.E. growth over the 2016 to 2051 period is expected to add 140 employees annually, representing 44% of overall employment growth in the County.



- E-commerce is anticipated to reduce the need for “bricks and mortar” retail over the long-term horizon. Despite this trend, it is important to recognize that the current commercial structure in the County’s Primary Settlement Areas (Growth Centres) is primarily oriented towards local-serving P.R.E. uses (uses that serve the immediate needs of residents), which are not as susceptible to e-commerce. P.R.E. uses related to work at home employment, tourism services, commercial services, local retail serving (e.g., grocery stores and pharmacy) and institutional uses (e.g., medical/health care) are anticipated to comprise the bulk of the P.R.E. growth over the next 30 years.
- Currently, there are approximately 4 residents for every 1 P.R.E. Community Area job in the County of Brant. Since 2006, this ratio has remained unchanged, which suggests that P.R.E. is growing at the same pace as population growth.
- Over the forecast horizon, it is anticipated that the total P.R.E. ratio will decrease slightly to 3 residents per 1 P.R.E. Community Area job, largely driven by strong growth related to work at home employment.
- Urban P.R.E. employment includes work at home employment which is anticipated to account for approximately 14% of P.R.E. growth.

6.3.4.2 *Urban E.L.E.*

As previously discussed, Urban E.L.E. represents jobs accommodated in industrial-type buildings on lands designated as Industrial in the Primary Settlement Areas (Growth Centres). This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities, as well as a limited amount of employment associated with commercial- and employment-supportive uses.

- As previously identified, the County has a diverse industrial base.¹ Over the past five years, the County has experienced employment growth in manufacturing, logistics/warehousing and construction sectors.
- Looking forward over the next 30 years, the County is anticipated to continue to accommodate steady urban E.L.E. growth comprised of a diverse range of industrial sectors. It is anticipated that urban E.L.E. will accommodate just under half (46%) the County’s employment growth, or 146 employees annually.

¹ Based on O.M.A.F.R.A. EMSI Analyst data.



6.3.4.3 *Rural E.L.E.*

Rural E.L.E., as previously discussed, consists of employment in industrial-type buildings within the Rural System. Rural E.L.E. includes dry industrial uses, uses that require no or partial municipal services (water and wastewater servicing).

- Rural E.L.E. represents a large portion (24%) of the County's employment base and includes some of the County's largest employers, including Stubbe's Precast (New Durham), Walter's Group (Highway 25/Highway 403), Beauti-Tone Paint factory (Burford), and Curtiss-Wright Valves Division-Farris (Cainsville).
- Recent rural E.L.E. growth has been largely associated with expansions of existing rural E.L.E. and modest growth on new sites.
- Over the forecast horizon, growth in rural E.L.E. is anticipated to include industrial employment in construction, select commercial uses (such as automotive/truck repair), logistics, and warehousing, sectors that typically do not require water services, fire protection, or urban amenities.
- It is anticipated that rural E.L.E. will accommodate approximately 3% of the County's employment growth, or 10 employees annually. Rural E.L.E. growth is anticipated to be accommodated through existing industrial operations, as well as new development opportunities in Cainsville and within the Highway 25/Highway 403 Employment Area.

6.3.4.4 *Other Rural Employment*

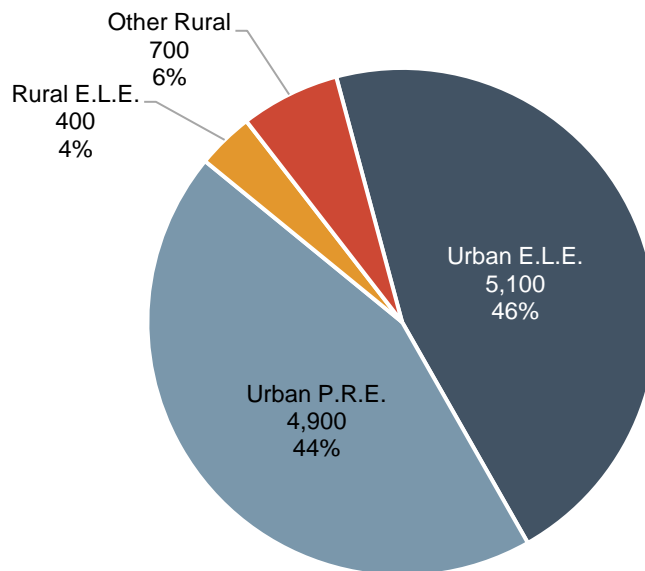
Other Rural Employment, as previously discussed, consists of employment within the Rural System that is not located in a Rural Employment Area.

- This category of employment represents 18% of the County's employment base.
- The primary sector, which includes agriculture and aggregates industries, has been a major driver of rural employment growth. Commercial and institutional uses in the Secondary Settlement Areas, Hamlets and the Remaining Rural Area are also a component of this category.
- Over the forecast horizon, it is anticipated that rural employment will continue to grow in rural-based sectors (primary sectors), as well as uses related to recreation and tourism.
- Value-added on-farm diversified uses are anticipated to be a key growing component of the County's rural work at home and off-site employment base.



- Technological innovation and improved broadband regional telecommunications will provide more opportunities for rural residents to work from home.
- It is anticipated that Other Rural Employment will accommodate approximately 6% of the County's employment growth, or 21 employees annually.

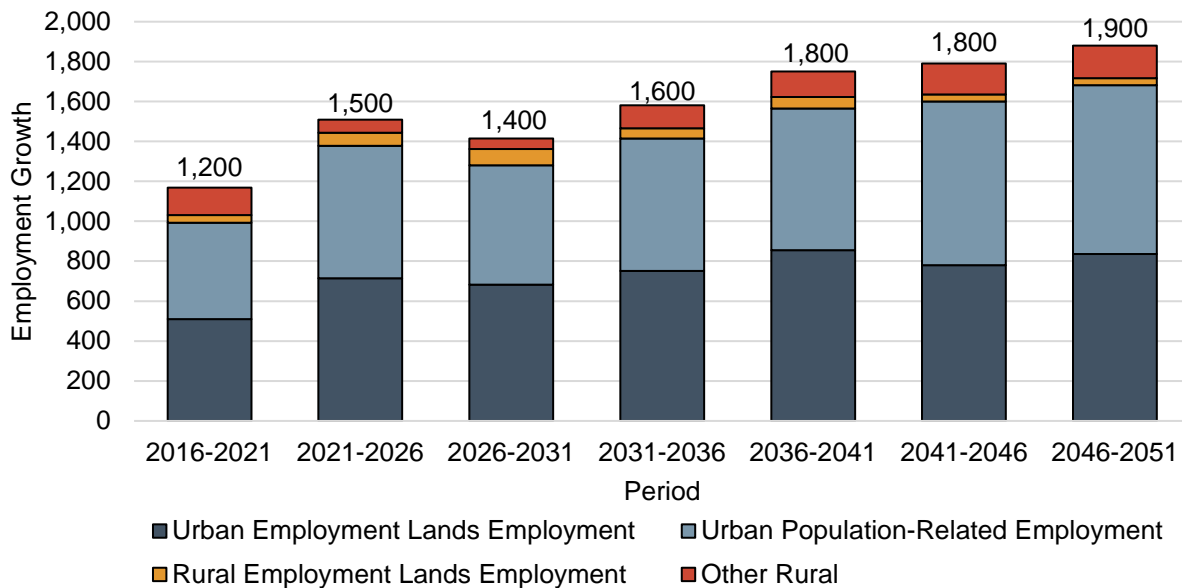
Figure 6-14
County of Brant
Employment Forecast by Employment Category,
2016 to 2051



Source: Watson & Associates Economists Ltd.



Figure 6-15
County of Brant
Employment Forecast by Employment Category, 2016 to 2051



Source: Watson & Associates Economists Ltd.

6.4 Employment Allocation by Settlement Area and Rural System to 2051

This chapter provides a summary of the forecast employment allocations by Primary Settlement Areas (Growth Centres) of Paris and St. George and the Rural System within the County of Brant. The employment allocations are further broken out by geographic policy area which includes Employment Areas, Urban Community Areas, Rural Employment Areas and Remaining Rural Area. Detailed tables on employment growth allocations are provided in Appendix C.

6.4.1 Employment by Primary Settlement Areas (Growth Centres) and Rural System

The employment growth forecast by Primary Settlement Areas (Growth Centres) and Rural System has been prepared based on a review of the following:



Local Supply Factors:

- A survey of vacant and occupied commercial space within the County's Primary Settlement Areas (Growth Centres);¹
- The availability and marketability (i.e., location, proximity to major highways, market character, etc.) of the County's supply of designated vacant serviced or serviceable employment lands; and
- Water and wastewater servicing capacity and potential solutions to overcome constraints (where identified).

Local Demand Factors:

- A review of historical and forecast employment growth rates within the County of Brant's commuter-shed;
- Discussions with County staff regarding recent non-residential development trends and future employment prospects in Paris, St. George and the Rural System;
- Impacts of local population growth by Primary Settlement Areas (Growth Centres) and Rural System on demands for P.R.E.;
- Review of recent Urban and Rural Employment Area absorption; and
- Recent non-residential building permit data by industrial, commercial, and institutional (I.C.I.) sector by Primary Settlement Areas (Growth Centres).

For each of the County's Primary Settlement Areas (Growth Centres), employment is forecast to grow at a rate higher than the past decade. This is partially driven by steady P.R.E. growth which is largely driven by strong local population growth and commercial opportunities. Accordingly, the largest share of P.R.E. has been allocated to Paris which has the largest share of population growth. In addition, Paris is anticipated to accommodate a strong rate of E.L.E. growth due to its opportunity to accommodate export-base industries with fully serviced sites and access to a 400-series highway.

6.4.2 Overview of Community Structure – Non-Residential Lands

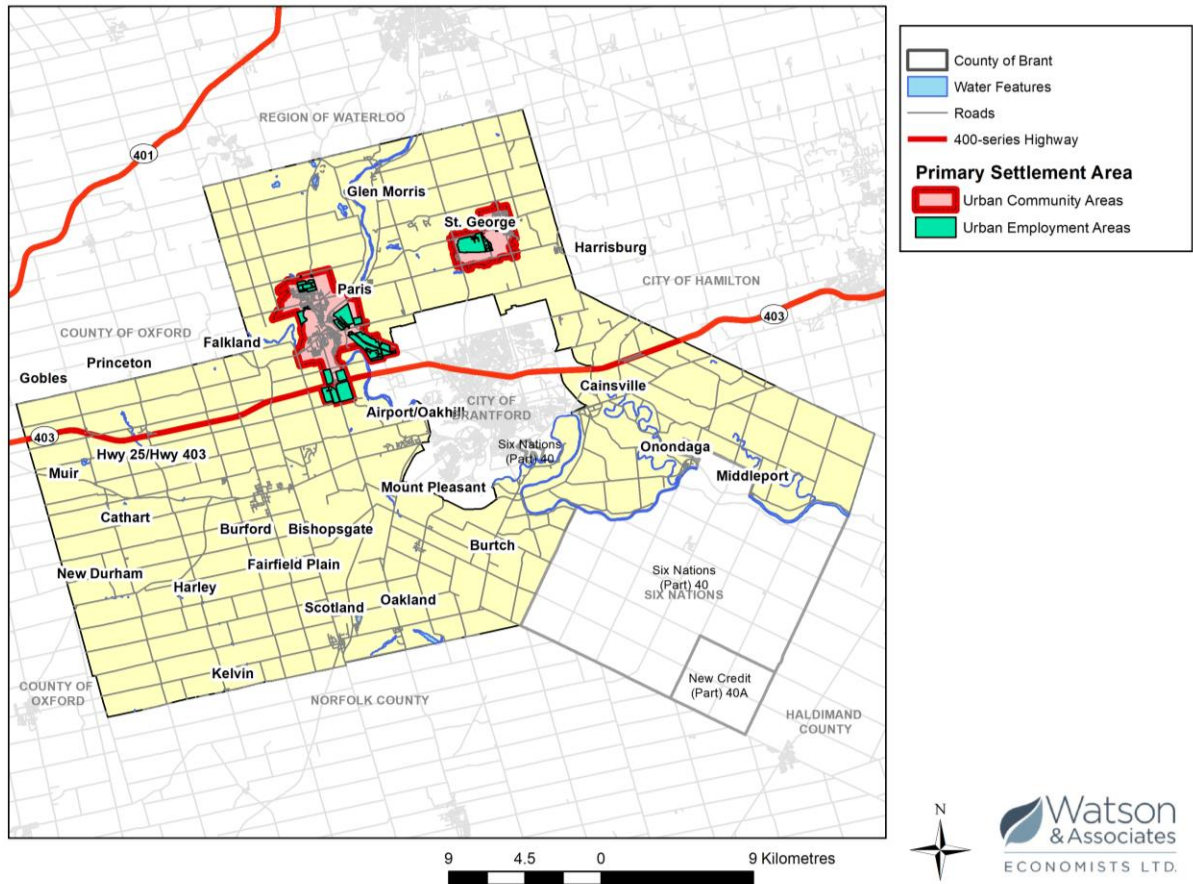
Figure 6-16 provides a map of the Primary Settlement Areas within the County of Brant. Non-residential lands within the Primary Settlement Areas of Paris and St. George are

¹ Details to be provided in the Phase 2 Report.



considered as urban non-residential lands and include two key components, Employment Areas and Community Areas.

Figure 6-16
County of Brant
Primary Settlement Areas
Urban Community Area and Urban Employment Area



Source: Watson & Associates Economists Ltd.

Figure 6-17 illustrates the County's non-residential land-use designations, using Paris and the surrounding rural area as an example. Lands designated for non-residential uses represent a core component of where employment growth is to be accommodated over the forecast horizon, including:

- Commercial
 - Core Area



- Mixed Use
- Shopping Centre Commercial
- General Commercial
- Institutional
- Employment
 - Urban Employment Area
 - Rural Employment Area.

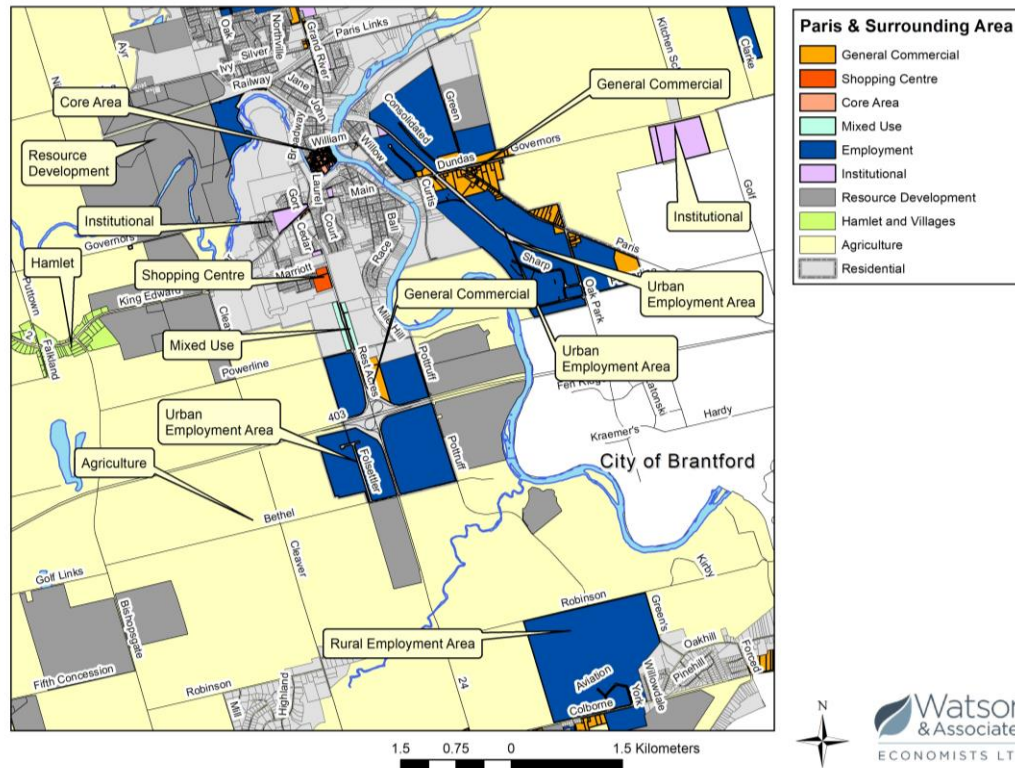
Work at home employment, rural employment outside Rural Employment Areas and non-residential development on residential lands (uses that are permitted) are anticipated to accommodate employment growth as well. Key designations in the Rural System include:

- Resource Development
- Hamlets & Villages
- Secondary Settlement Areas:
 - Core Area
 - General Commercial
 - Institutional
- Agriculture.

Further details on the role, function and purpose of these designations are provided later in this chapter.



Figure 6-17
County of Brant
Current County of Brant O.P. (2012)
Non-Residential O.P. Designations
Paris and Surrounding Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

6.5 Existing Employment Base by Settlement Area, 2021

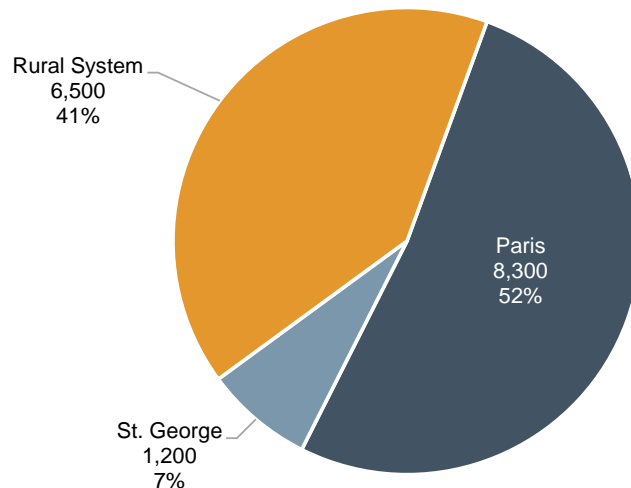
6.5.1 Existing Employment Base

As of 2021, the County of Brant's employment base was estimated at 14,900. As summarized in Figure 6-18, just over one-half (52%) of the County's employment base is accommodated within Paris. A large portion of the employment base is within the Rural System at 41%. The Rural System comprises a diverse range of employment including resource development, agriculture, Employment Areas, and a small component of P.R.E. St. George represents 7% of the County's employment base.



Further details on the employment base for each Area Municipality is provided in Appendix C.

Figure 6-18
County of Brant
Share of 2021 Employment Estimate by Primary Settlement Areas (Growth Centres)
and Rural System



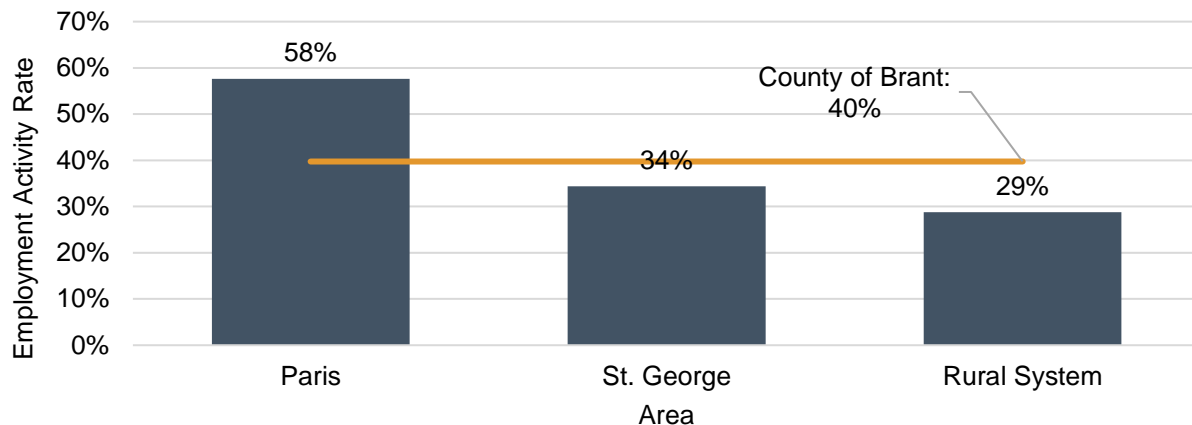
Note: Figures have been rounded.
Source: Watson & Associates Economists Ltd.

6.5.2 Employment Activity Rates by Area

Figure 6-19 summarizes the employment activity rate (ratio of jobs to population) by settlement area and the total Rural System compared to the County of Brant employment activity rate of 40% as of 2021. A high employment activity rate suggests a larger portion of employment relative to the population base of the settlement area. As summarized, Paris has a high employment activity rate at 58%. Paris has a large employment base and relies on in-commuting from the County and the surrounding G.G.H. municipalities. St. George has an employment activity at 34%, below the County-wide average of 40%. A key challenge for St. George over the forecast horizon is its ability to attract non-residential growth that will serve the residential growth anticipated and contribute towards building a complete community over the long term. The employment activity rate within the Rural System is at 29%, which is also below the County-wide average. A key challenge for the Rural System includes maintaining agriculture employment by supporting on-farm diversification, in light of trends related to increased automation and consolidation of agriculture operations.



Figure 6-19
County of Brant
Employment Activity Rate by Area, 2021



Note: Population used to calculate the employment activity rate includes the net Census undercount.
Source: Watson & Associates Economists Ltd.

6.5.3 Urban and Rural System Employment by Type, 2021

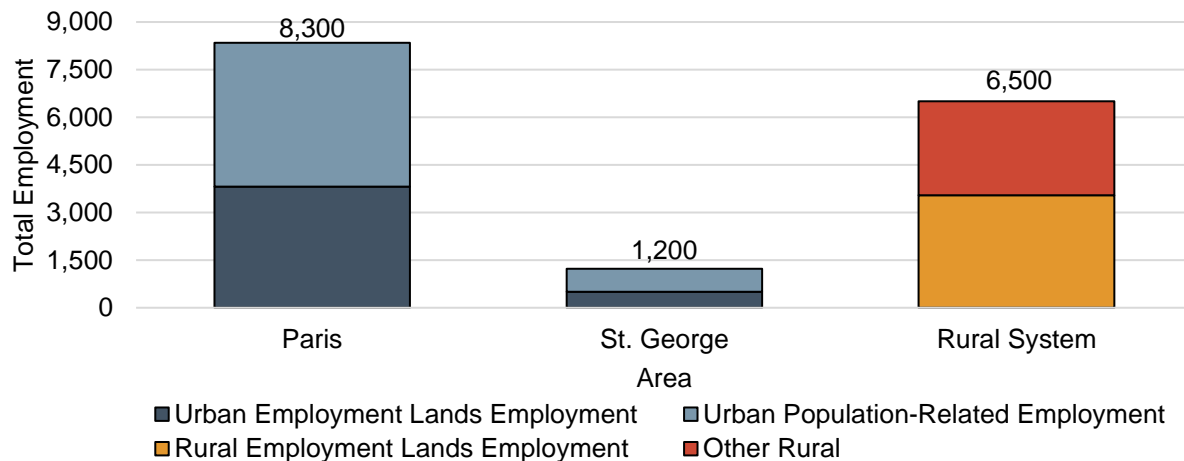
As previously discussed, the County of Brant has a diverse employment base, accommodating a range of sectors and uses in the Urban and the Rural Systems. Figure 6-20 illustrates the 2021 estimated employment for each Area Municipality by employment type (urban E.L.E., urban P.R.E. and rural E.L.E.).

Key highlights include:

- The employment base in Paris includes a split in employment between P.R.E. and E.L.E., with P.R.E. having a slightly larger share at 54% of the employment base;
- St. George with only 1,200 jobs has approximately 59% of P.R.E. A large portion of the P.R.E. is related to work at home employment. E.L.E. represents 41% of the employment base in St. George; and
- The Rural System has approximately 6,500 jobs and is slightly more oriented towards rural E.L.E. at 54%. The remaining 46% of the employment within the Rural System is comprised of a diverse range of employment, referred to as Other Rural in Figure 6-21 and includes employment in agriculture, resource development and to a lesser extent P.R.E.



Figure 6-20
County of Brant
2021 Estimate by Area and Employment Type



Note: Figures have been rounded.
Source: Watson & Associates Economists Ltd.

6.6 Employment Forecast by Area Municipality, 2016 to 2051

Figures 6-21 through to 6-25 summarize the employment forecast to 2051 by Area Municipality. Further details are provided in Appendix C. While employment growth rates vary for St. George and Paris, each share several relatively common attributes with respect to long-term employment trends, as follows:

- Paris and St. George are expected to experience steady to strong employment growth over the long-term forecast period;
- Annual employment growth is anticipated to increase from recent levels experienced over the last 10-year Census period for St. George and Paris;
- Future employment growth will comprise a diverse range of employment sectors, including E.L.E.; and
- P.R.E. will be driven by population growth.

As identified above, various factors were considered in allocating employment growth by Area Municipality. In addition to the above considerations, several assumptions have been made with respect to the employment growth potential for Paris, St. George,



and the Rural System, based on discussions with the County and feedback from County Council.

Key observations on the employment growth allocation have been organized by Area Municipality. As previously mentioned, further details on the employment growth allocation are provided in Appendix C, including details on employment by employment category, existing employment base, and employment forecast to 2051. Figures are provided based on the 2016 to 2051 period, as well as 2021 to 2051, to align with the land needs analysis, based on the existing inventory of vacant non-residential lands.

Paris

- The existing employment base in Paris, as of 2021, comprises 87% of the employment within the Urban System; the remaining 13% is in St. George. Overall, Paris represents 52% of the County's employment base (including the Rural System).
- As summarized in Figure 6-21b, Paris is anticipated to accommodate 73% of the County-wide employment growth over the 2021 to 2051 period. Growth is anticipated to accommodate 57% E.L.E. and 43% P.R.E. serving the local population base.
- As summarized in Figure 6-23, Paris is anticipated to grow at an annual employment rate of 2.1% over the next 30 years (2021 to 2051), which is slightly lower than the annual growth rate experienced over the most recent five-year period (2016 to 2021), which averaged 2.4% annually.
- Paris is anticipated to add 7,200 employees over the 2021 to 2051 period, representing approximately 240 employees annually. This is higher than the annual employment added over the most recent five-year period, 2016 to 2021, of 186 employees annually.

St. George

- St. George's existing employment base, as of 2021, comprises 13% of the employment within the Urban System and 7% of the employment County-wide.
- As summarized in Figure 6-21b, St. George is anticipated to accommodate 17% of the County's employment growth over the forecast horizon.
- Employment growth within St. George is anticipated to be significantly higher than historical trends, largely driven by population growth and the need for P.R.E.



to support the local population base. It is noted that wastewater servicing constraints in St. George may potentially limit the amount of employment allocated to this area over the long-term planning horizon, and could result in further refinements to the growth allocations by urban and rural area during the next M.C.R. review.

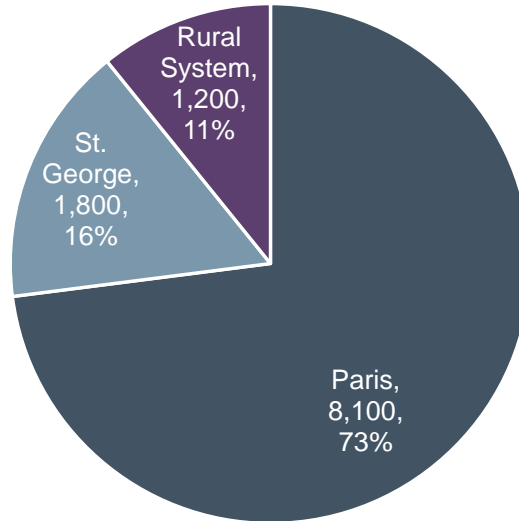
- As summarized in Figure 6-23, St. George is anticipated to achieve a relatively higher rate of employment growth (3.1% annually) compared to Paris and the County. As summarized in Figure 6-22b, St. George is anticipated to add 1,700 additional employees over the 2021 to 2051 period, approximately 60 employees annually.
- Employment growth is anticipated to include primarily urban P.R.E. at 67% and a small portion of urban E.L.E. at 28%.

Rural System

- The Rural System comprises 41% of the County's employment base. By 2051, the Rural System is anticipated to comprise 29% of the County's employment base. The shift towards a greater employment share within the Urban System is due to opportunities to accommodate E.L.E. in Paris, and the need for P.R.E. to support the local population in Paris and St. George.
- As summarized in Figure 6-21b, the Rural System is anticipated to add 1,000 employees over the 2021 to 2051 period, or 35 employees annually. Employment growth in the Rural System is anticipated to be comprised of 33% E.L.E., with the remaining 68% of employment across a range of sectors.
- On-farm diversification opportunities are expected to maintain employment levels in the agriculture sector and broaden employment opportunities in the Rural System. In addition, the Rural System is anticipated to support growth in work at home employment, given improvements in internet services expected over the planning horizon.

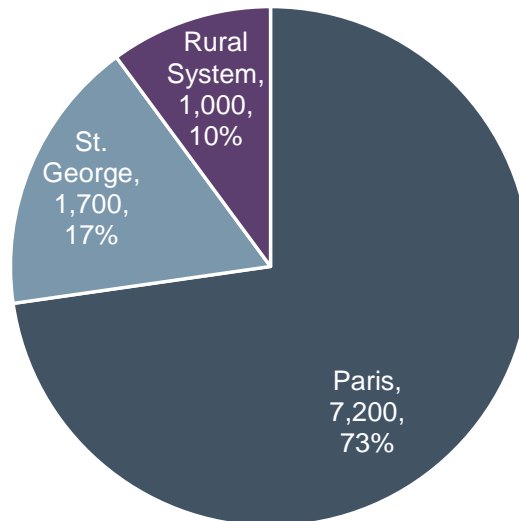


Figure 6-21a
County of Brant
Employment Growth Allocation by Area,
2016 to 2051



Source: Watson & Associates Economists Ltd.

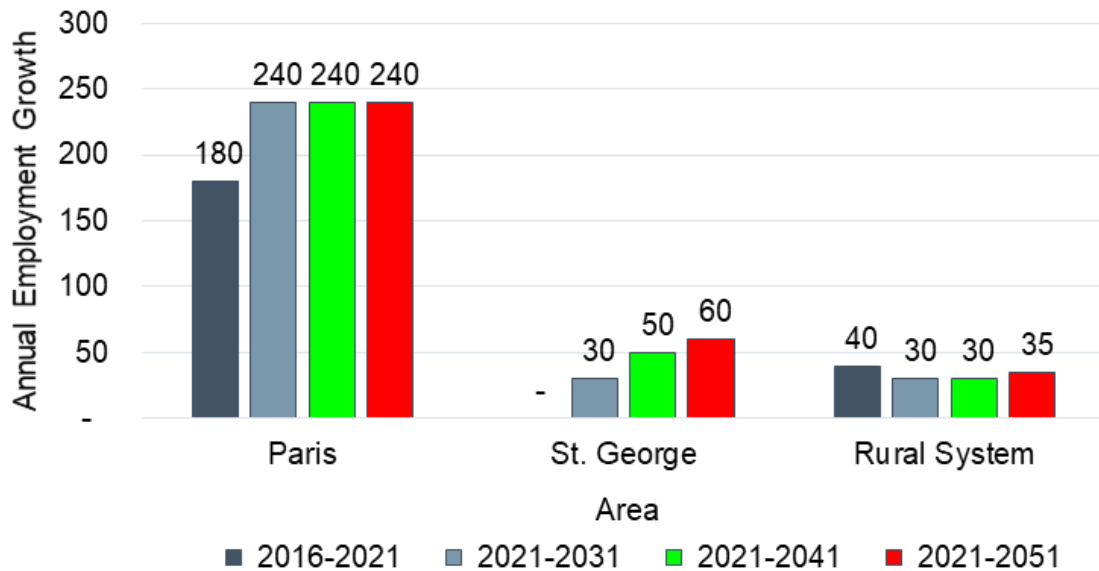
Figure 6-21b
County of Brant
Employment Growth Allocation by Area,
2021 to 2051



Source: Watson & Associates Economists Ltd.

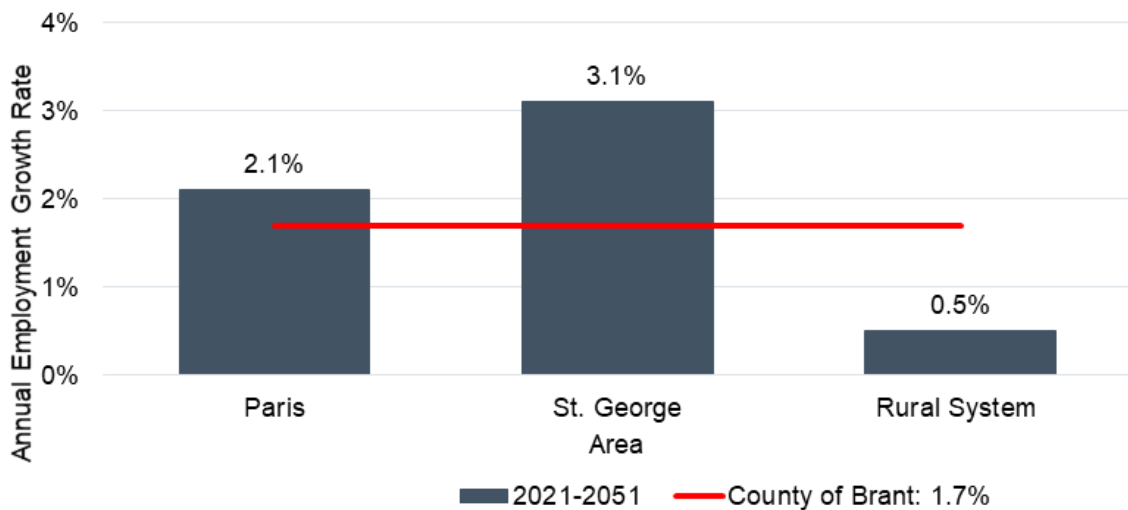


Figure 6-22
County of Brant
Annual Employment Growth by Area
2016 and 2051



Source: Watson & Associates Economists Ltd., 2021.

Figure 6-23
County of Brant
Forecast Annual Employment
Growth Rates, 2021 to 2051



Source: Watson & Associates Economists Ltd.



Figure 6-24a
County of Brant
Employment Category Growth by Area
2016 to 2051

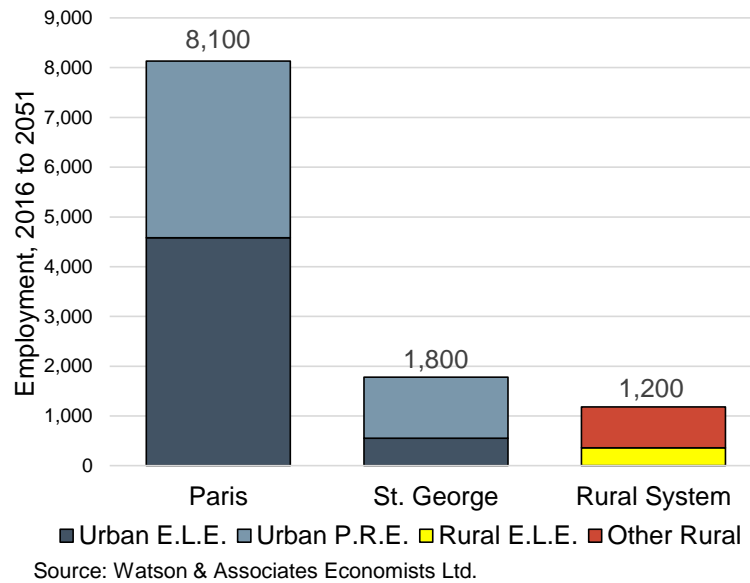


Figure 6-24b
County of Brant
Employment Category Growth by Area
2021 to 2051

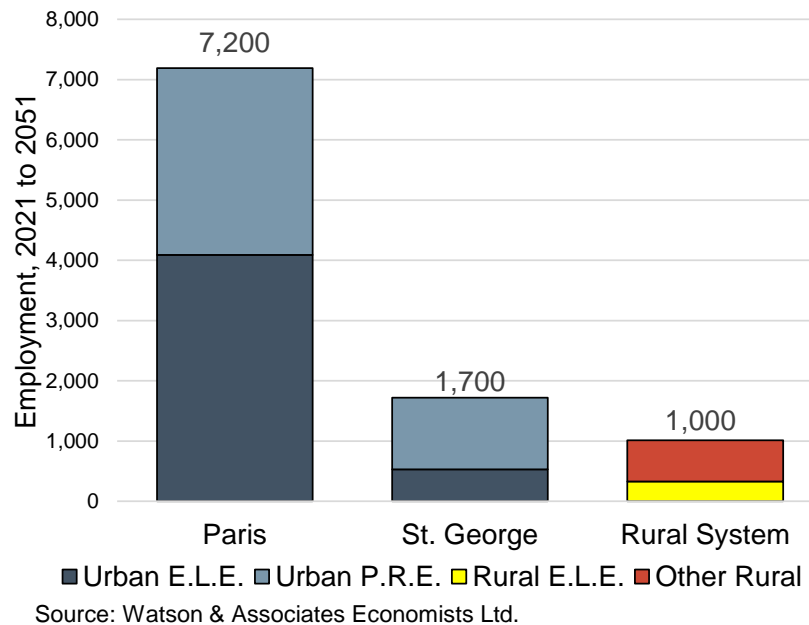
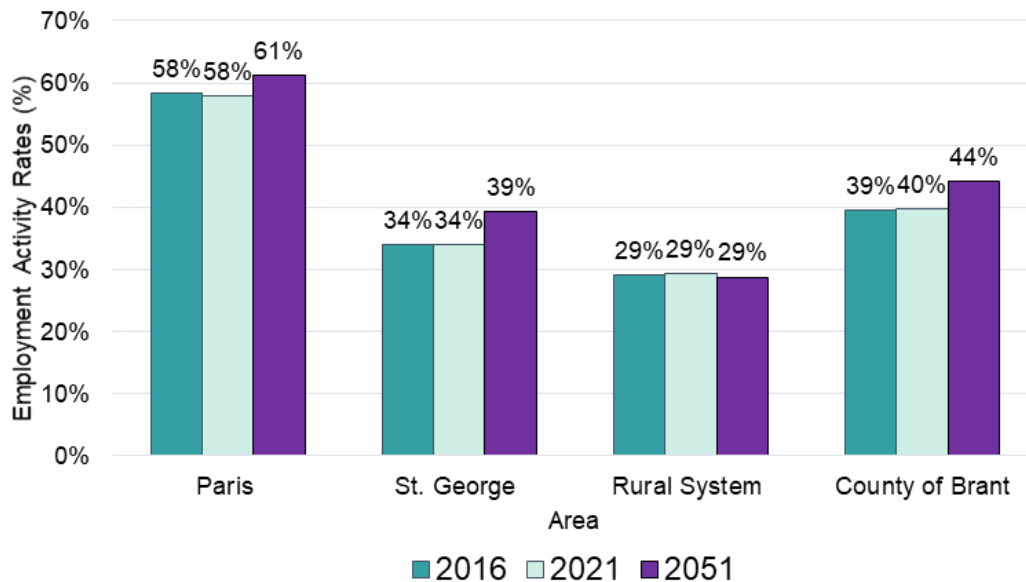




Figure 6-25
County of Brant
Employment Activity Rates,
2016, 2021 and 2051



Source: Watson & Associates Economists Ltd.

6.6.1 Employment Growth Allocation by Geographic Policy Area

As previously discussed, employment growth by category is further allocated by geographic area, which includes Employment Areas, Urban Community Areas, Rural Employment Areas and Remaining Rural Area. As previously discussed, while Employment Areas accommodate the County's E.L.E., Employment Areas also accommodate P.R.E. uses based on current O.P. permissions.

6.6.1.1 Urban System

Overall, the Urban System is anticipated to accommodate 90% of the County's employment growth over the 2021 to 2051 forecast horizon. Details of the growth allocation by the two policy areas (Urban Employment Area and Urban Community Area) are provided below.

Urban Employment Areas

Over the forecast period, it is anticipated that 100% of urban E.L.E. growth will be accommodated in the Urban Employment Area. As summarized in Figure 6-27, P.R.E.



uses are anticipated to comprise 18% of the employment growth accommodated in Urban Employment Areas (approximately 1,035 jobs), while E.L.E. is anticipated to represent 82% of the Urban Employment Area growth over the 2021 to 2051 period (approximately 4,690 jobs). P.R.E. uses accommodated in Urban Employment Areas are anticipated to comprise commercial uses that support the function of the Employment Area, as well as select commercial uses that are permitted in Employment Areas.

Paris is anticipated to accommodate 90% of the County’s Urban Employment Area growth, while St. George is anticipated to accommodate the remaining 9% of the Urban Employment Area growth.

Figure 6-26
County of Brant
Urban System
Urban Employment Areas by Employment Type, 2021 to 2051

Employment Type in Employment Areas	Paris	St. George	Total Urban Employment Area	Share (%)
Urban P.R.E. Employment	975	60	1,035	18%
Urban E.L.E. Employment	4,150	540	4,690	82%
Total Urban Employment Area	5,200	600	5,725	100%
Share (%)	91%	9%	100%	

Source: Watson & Associates Economists Ltd.

Urban Employment Areas are anticipated to accommodate approximately 5,700 jobs over the 2021 to 2051 period, or 57% of the County’s employment growth over the 2021 to 2051 horizon.

Urban Community Areas

Over the period, it is anticipated that Urban Community Areas will accommodate 76% of the County’s forecast urban P.R.E. The remaining 24% of forecast urban P.R.E. is anticipated to be accommodated in Urban Employment Areas. Urban Community Areas are anticipated to accommodate 34% of the County’s employment growth (3,300 jobs) over the 2021 to 2051 horizon.



As summarized in Figure 6-27, Paris is anticipated to accommodate 65% of the County’s Urban Community Area growth, while St. George is anticipated to accommodate the remaining 35%.

Since employment growth in the Community Area is largely driven by population growth, Figure 6-27 also provides a comparison of the ratio of population growth to Community Area employment for Paris and St. George. As summarized in Figure 6-27, it is anticipated that the County will add 1 Community Area job for every 4.6 new residents added to the Urban System. Compared to Paris, it is anticipated that St. George will add more Community Area employment relative to its population growth. St. George is forecast to add 1 Community Area job for every 3.5 residents, compared to Paris adding 1 Community Area job for every 5.2 residents. As discussed further in this chapter, St. George has a very small commercial base, and over the forecast horizon St. George will have significant demand for additional commercial space. While robust population growth is anticipated for Paris, the commercial base in Paris is more extensive than St. George and already has a strong commercial base to support future growth.

Figure 6-27
County of Brant
Urban System
Urban Community Area Employment Type, 2021 to 2051

Employment Type in Urban Community Areas	Paris	St. George	Total Urban Community Area	Share (%)
Urban P.R.E.	2,125	1,130	3,255	100%
Urban E.L.E.	0	0	0	0%
Total Urban Community Area (A)	2,125	1,130	3,255	100%
Share (%)	65%	35%	100%	
Population, 2021 to 2051 (B)	11,000	4,000	15,000	
Ratios of Residents to Community Area Job Number of Residents per 1 job (C = B / A)	5.2	3.5	4.6	

Source: Watson & Associates Economists Ltd.

Figure 6-28 provides a summary of the Community Area employment growth by policy area, D.G.A., and B.U.A. for Paris and St. George. It is anticipated over the forecast horizon that 80% of the Community Area will be accommodated in the D.G.A. It is important to recognize there are opportunities in the D.G.A. to accommodate additional



development and employment growth on existing commercial sites (intensification). A greater share of Community Area growth is anticipated in the B.U.A. in St. George compared to Paris, due to intensification and vacant site opportunities in St. George. Further, in St. George a large portion of the designated commercial lands along the Brant Road corridor are classified as within the B.U.A.; however, they are not fully developed.

Figure 6-28
County of Brant
Urban Community Areas
Urban Community Areas by Policy Area (D.G.A. and B.U.A.), 2021 to 2051

Employment Type in Urban Community Areas	Paris	St. George	Total Urban Community Area	Share (%)
Designated Greenfield Areas (D.G.A.)	1,800	800	2,600	80%
Built-up Areas (B.U.A.)	325	330	655	20%
Total Urban Community Area (A)	2,125	1,130	3,255	100%
Share (%)	65%	35%	100%	

Source: Watson & Associates Economists Ltd.

6.6.1.2 Rural System

As summarized in Figure 6-29, rural E.L.E. represents a third of the employment growth anticipated in the Rural System, while the remaining 67% represents a diverse range of employment including work at home employment and employment in agriculture, resource development, and to a lesser extent commercial employment.



Figure 6-29
County of Brant
Rural Employment by Employment Type, 2021 to 2051

Rural Employment Type	Total Rural System	Share of Rural (%)
Rural E.L.E.	330	33%
Other Rural	680	67%
Total Rural	1,010	100%

Source: Watson & Associates Economists Ltd.

Rural Employment Areas

As summarized in Figure 6-30, over the forecast it is anticipated that the majority of rural E.L.E. will be accommodated in Rural Employment Areas (90%). A small portion (10%) of rural E.L.E. is anticipated to be accommodated on small rural sites outside Employment Areas. It is anticipated that Rural Employment Areas will accommodate a small portion of non-E.L.E. uses, primarily commercial uses (approximately 100 employees).

Rural Employment Areas are anticipated to accommodate 400 jobs over the 2021 to 2051 horizon, accommodating 40% of the Rural System employment growth and 4% of the County's employment growth.

Figure 6-30
County of Brant
Rural Employment Areas, 2021 to 2051

Rural Employment Type	Share of Rural Employment in Rural Employment	Rural Employment Area	Rural Employment Area
Rural E.L.E. in Rural Employment Areas	90%	300	75%
Other E.L.E. in Rural Employment Areas	15%	100	25%
Total Rural Employment Area	40%	400	100%

Source: Watson & Associates Economists Ltd.

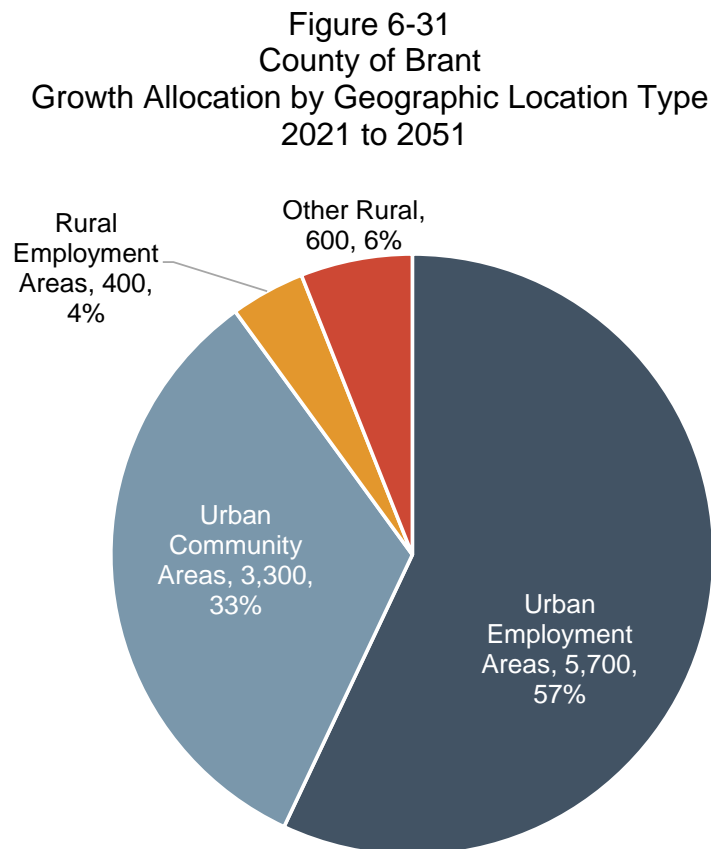


Other Rural Employment

The remaining rural employment (approximately 600 jobs) is forecast to represent 6% of the County's employment growth over the forecast horizon.

6.6.1.3 Summary of Employment by Area Type, 2021 to 2051

Figure 6-31 provides a summary of the County's employment growth allocation by area type as discussed above.



Note: Figures has been rounded.

Source: Watson & Associates Economists Ltd.

Further details on the opportunity to accommodate commercial development and Employment Area development, including land needs, are provided in the following section. In addition, a discussion of employment growth opportunities in the Rural Area is provided.



6.7 Commercial Overview

Commercial lands accommodate a large proportion of the population-related employment base, primarily within the Urban Community Area. A small portion of commercial growth is anticipated to be accommodated in Employment Areas, as well as within the Rural System. Provided herein is a summary of the commercial sector and the opportunity to accommodate commercial employment in the County.

6.7.1 County of Brant Official Plan Commercial Policies

Commercial areas in the County O.P. have been designated Core Area (as defined in section 3.8 of the O.P.), General Commercial (as defined in section 3.9 of the O.P.) and Shopping Centre Commercial (as identified in section 3.10 of the O.P.). In accordance with section 2.5.2 of the O.P., priority should be given to locate commercial and retail uses in proximity to Highway 403, including interchanges, and on land that is fully serviced or on land where services can be reasonably extended.

6.7.1.1 Core Areas

As identified in section 3.8.1 of the O.P., lands designated Core Area are primarily the downtown areas within the Primary Settlement Areas (Growth Centres) and Secondary Settlement Areas of Paris, Burford, and St. George. These areas function as primary activity centres and gathering places within the County and are the location for a wide range of uses, including retail, service commercial, cultural, tourism, recreational, entertainment, business and professional, government, institutional, social and community, employment, and residential uses.

6.7.1.2 General Commercial

As per section 3.9.2 of the O.P., the predominant use of land in the General Commercial designation is retail commercial, entertainment, professional offices, financial institutions, assembly halls, eating establishments, automotive uses, hotels and motels, community facilities, and residential uses above the first floor.

The General Commercial designation is intended to provide for commercial establishments offering goods and services which primarily serve the County's market area.



6.7.1.3 Shopping Centre Commercial

Shopping Centre Commercial, as opposed to General Commercial is intended to serve residents of the County beyond the limits of the County.

The Shopping Centre Commercial designation includes primarily retail stores, as well as personal and service commercial uses, restaurants, financial institutions, and commercial recreational establishments. Furthermore, large format retail uses shall be permitted in the Shopping Centre Commercial designation within the Urban Settlement Areas through site-specific amendment to the County O.P. and Zoning By-law.

6.7.2 Characteristics of the County of Brant's Commercial Space

The County's commercial base is primarily concentrated in Paris, and to a lesser extent St. George. Other settlement areas across the County accommodate a small commercial base, less than 50,000 sq.ft. (4,700 sq.m). After Paris and St. George, Burford has the largest commercial base at approximately 47,000 sq.ft. (4,400 sq.m).

As summarized in Figure 6-32, the County of Brant has approximately 683,000 sq.ft. (64,000 sq.m) of commercial space within the Primary Settlement Areas (Growth Centres) of Paris and St. George. Provided below is a summary of the commercial base in Paris and St. George.

Paris

Paris has a vibrant downtown which includes a large concentration of service businesses and specialty stores that cater to the population base of the County and visitors to the area. Paris has two large supermarkets (Sobeys and No Frills) anchoring the Paris commercial base in the north and south.

Canadian Tire and Home Hardware are the largest retailers providing comparison-based retail goods that compete within the regional market area, notably with the City of Brantford. There are two accommodation facilities, a budget motel in the southeast end and a historic hotel in the downtown core. Office uses are in small-scale office buildings (less than 20,000 sq.ft./1,900 sq.ft.), as well as



No Frills Grocery Store, Paris. A large commercial use of approximately 30,000 sq.ft. (2,800 sq.m).



in units in retail buildings. Paris is the primary service centre for health and medical care services in the County, with the Willett Urgent Care Centre as an important anchor to the community.

Paris has approximately 586,000 sq.ft. (54,400 sq.m) of commercial building space. Relative to the population base, Paris has approximately 41 sq.ft. (3.8 sq.m) of commercial building space per resident (commercial building space per capita), which is considered low, but within an average range for a community within proximity to a larger urban centre (i.e., City of Brantford).

Approximately 29,000 sq.ft. (2,700 sq.m) of the commercial building space in Paris is vacant. The commercial building space vacancy rate is 5%, which is considered low. Most of the vacant space is concentrated in one large unit of 20,000 sq.ft. (1,900 sq.m) within a plaza in the Grand River St. N. commercial corridor. A healthy commercial vacancy rate is generally within 5% to 10% which supports the ability of the market to accommodate relocations of retailers. At the time of this study there was approximately 70,000 sq.ft. (6,500 sq.m) of commercial space under construction within the Rest Acres Road commercial corridor, and additional multi-unit commercial leasing opportunities for a new unbuilt retail plaza at 185 & 197 Pinehurst Road, which is not included in the building space inventory.

St. George

St. George accommodates a small commercial base of approximately 90,000 sq.ft. (8,400 sq.m). The commercial base includes two distinct functions. The western extent of the St. George settlement area along Brant Road (Highway 24) primarily serves passing motorists. This area is primarily undeveloped with only a few commercial businesses. The downtown core primarily serves the convenience and immediate needs of residents (convenience stores, small grocery store and bank), as well as providing a small base of service businesses and restaurants for the local population and surrounding rural area. The downtown core of St. George includes a traditional Main Street; however, retail uses are primarily on the one side of the street. Infill opportunities and conversion of



Food Town Grocery Store, St. George. The largest commercial use of approximately 12,000 sq.ft. (1,110 sq.m).

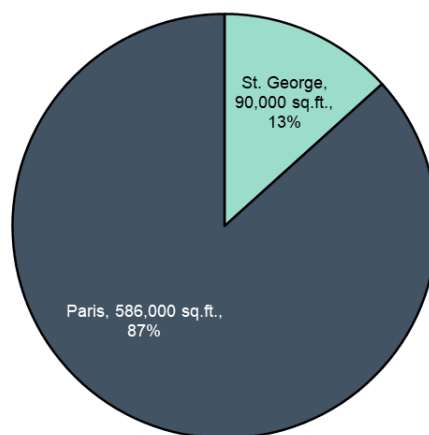


residential buildings on designated lands in the core provide an opportunity to strengthen the commercial base of the core and provide additional commercial uses on the west side of the Main Street.

St. George has approximately 26 sq.ft. (2.4 sq.m) of commercial building space per resident (commercial building space per capita) which is considered very low and reflects a community where the majority of commercial shopping is done outside the community.

St. George offers a limited amount of available vacant commercial building space. Approximately 2,700 sq.ft. (250 sq.m) of the commercial building space in St. George is vacant. The commercial building space vacancy rate is 3%, which is considered below a healthy range in a balanced market.

Figure 6-321
County of Brant
Paris and St. George Commercial Building Space, G.L.A. (sq.ft.),
January 2021



Source: Based on site visits by Watson & Associates Economists Ltd.

6.7.3 Commercial Nodes and Corridors in Paris and St. George

Paris has four distinct commercial nodes/corridors, as illustrated in Figure 6-33a. The four commercial nodes and corridors include:

- Paris Downtown Core;
- Grand River St. N.;
- Rest Acres Rd.; and



- Dundas St. E. and Paris Rd.

Provided below is a summary of the nodes and corridors. Further information on the building space and land supply is provided in Appendix F.

Paris Downtown Core

The Paris downtown core has approximately 198,000 sq.ft. (18,400 sq.m) of commercial space on approximately 4 ha of designated lands. The designated downtown Core Area includes a large residential component of at-grade residential uses (single detached, semi-detached and townhouses), which comprise 38% of the downtown Core Area. The commercial base is largely oriented towards Grand River St., a historical Main Street, and the adjacent side streets. The repurposed industrial building, the Paris Wincey Mills, is a multi-storey, mixed-use building accommodating a range of office and retail uses. The downtown core offers the opportunity for infill and conversion of residential uses to non-residential uses; however, given the location is within a floodplain, there are restrictions on development within the downtown core. It is estimated that there is less than 1 ha of vacant designated commercial land in this node. Further, the downtown core only has two vacant storefronts of approximately 3,300 sq.ft. (310 sq.m) of building space as of January 2021.

Grand River St. N.

The Grand River St. N. commercial corridor caters to auto-oriented travel in the north end of Paris, a gateway to Paris from the north. This corridor includes the largest retail plazas in Paris, as well as two large retailers, Canadian Tire and Sobeys. It is estimated that this corridor accommodates approximately 161,000 sq.ft. (15,000 sq.m) of commercial space over 7 ha of developed commercial land. It is estimated that there is approximately 3 ha of vacant designated commercial land in this corridor. This corridor has approximately 20,000 sq.ft. (1,900 sq.m) of commercial building space (consisting of a former liquidation store) as of January 2021. This area also offers potential intensification opportunities, as the average building coverage is below the industry standard of 25% (ratio of building space to land area).

Rest Acres Road

Rest Acres Road is the newest commercial corridor in Paris, serving as a gateway to Paris from the 403 Highway in the south. This area offers the largest opportunity to



attract regional trade given sites are near the 403 Highway. As of January 2021, there was approximately 41,000 sq.ft. (3,800 sq.m) of built commercial space on approximately 1.5 ha of developed designated commercial lands. At the time of compiling the commercial inventory, a new commercial development (1070 Rest Acres Rd.) of approximately 70,000 sq.ft. (6,500 sq.m) was under construction (not included in the inventory). The Rest Acres Rd. corridor provides approximately 23 ha of vacant designated commercial land. This corridor also includes three different commercial designations: Shopping Centre Commercial, General Commercial, and Mixed Use.

Dundas Street E. and Paris Road

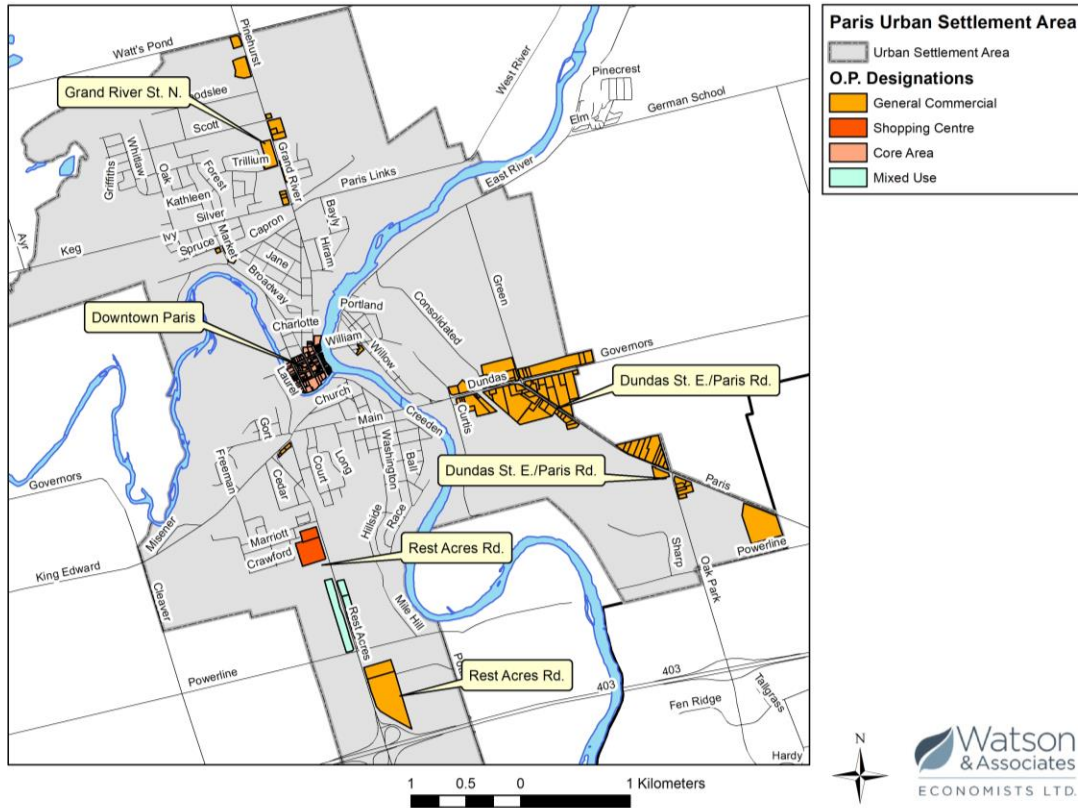
The Dundas Street E. and Paris Road commercial corridor is adjacent to an Employment Area. This auto-oriented corridor is an important gateway to Paris from the southeast and serves in supporting the employment uses in the Employment Area. The total commercial building space is estimated at 140,000 sq.ft./13,000 sq.m accommodated on approximately 15 ha of developed designated land. The largest commercial uses in this area include a No Frills grocery store, a building supply store (Brantford Granite & Quartz) and a motel. Developed commercial lands within this corridor have very low building coverage ratios, a building ratio of less than 10%. As such, this area offers significant intensification opportunities. In addition, a large portion of the designated base is occupied by rural residential uses (approximately 25 ha), which over the planning horizon could accommodate commercial development. There is approximately 20 ha of vacant commercial land.

Other Commercial Sites in Paris

There are 46,000 sq.ft. (4,300 sq.m) of additional commercial built space in Paris outside the corridors identified above (accommodated on parcels of approximately 3 ha). This commercial space is located on lands designated as residential, Employment Area and small commercial designated sites. The largest supply of commercial building space outside the corridors and nodes of designated commercial space includes commercial space within the Paris Flats neighbourhood (approximately 15,000 sq.ft./1,400 sq.m), as well as along Dumfries Street (approximately 11,000 sq.ft./1,000 sq.m), areas that are designated as urban residential.



Figure 6-33a
County of Brant
Paris Commercial Nodes & Corridors



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

St. George has three distinct commercial nodes/corridors, as illustrated in Figure 6-33b. The three commercial nodes and corridors include:

- St. George Downtown Core;
- Brant Road; and
- Site Specific Policy Area 25.

Provided below is a summary of the nodes and corridors. Further information on the building space is provided in Appendix F and land supply is provided in Appendix G.

St. George Downtown Core

The St. George downtown core has approximately 76,000 sq.ft. (7,100 sq.m) of commercial space on approximately 4 ha of designated commercial land. The



commercial building space in the core is primarily concentrated on one side of the Main Street, a traditional Main Street. The downtown core of St. George has a developed commercial land area similar in size to the developed commercial land area in the Paris downtown core, however with significantly less commercial space in St. George. The St. George downtown core provides opportunities for intensification, as there are sites with low utilization of commercial building space, opportunities for infill development, as well as opportunities for residential building conversions to non-residential uses. It is estimated that there is approximately 1.5 ha of vacant land within the St. George downtown core.

Site Specific Policy Area 25

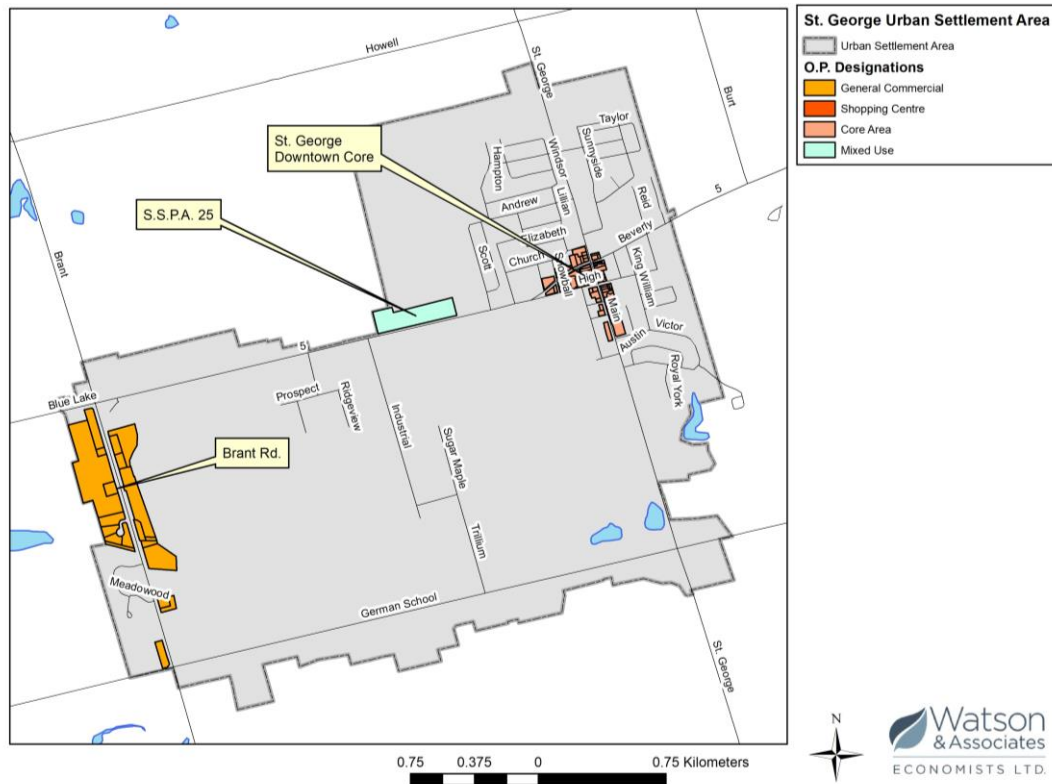
Site Specific Policy Area 25 is an undeveloped designated mixed-use site of approximately 5 ha and according to the County of Brant O.P. excludes residential uses. These lands are part of a larger area planned for new residential communities to the south.

Brant Road

Brant Road is a commercial corridor along the western extent of the St. George settlement area. This area offers a large supply of vacant designated lands oriented towards passing motorists. It is estimated that there is approximately 2 ha of developed and 17 ha of vacant land. Further opportunities include the potential development on lands with rural residences of approximately 5 ha. The commercial corridor currently includes a Tim Hortons, a gas station and an automotive repair operation.



Figure 6-33b
County of Brant
St. George Commercial Nodes & Corridors



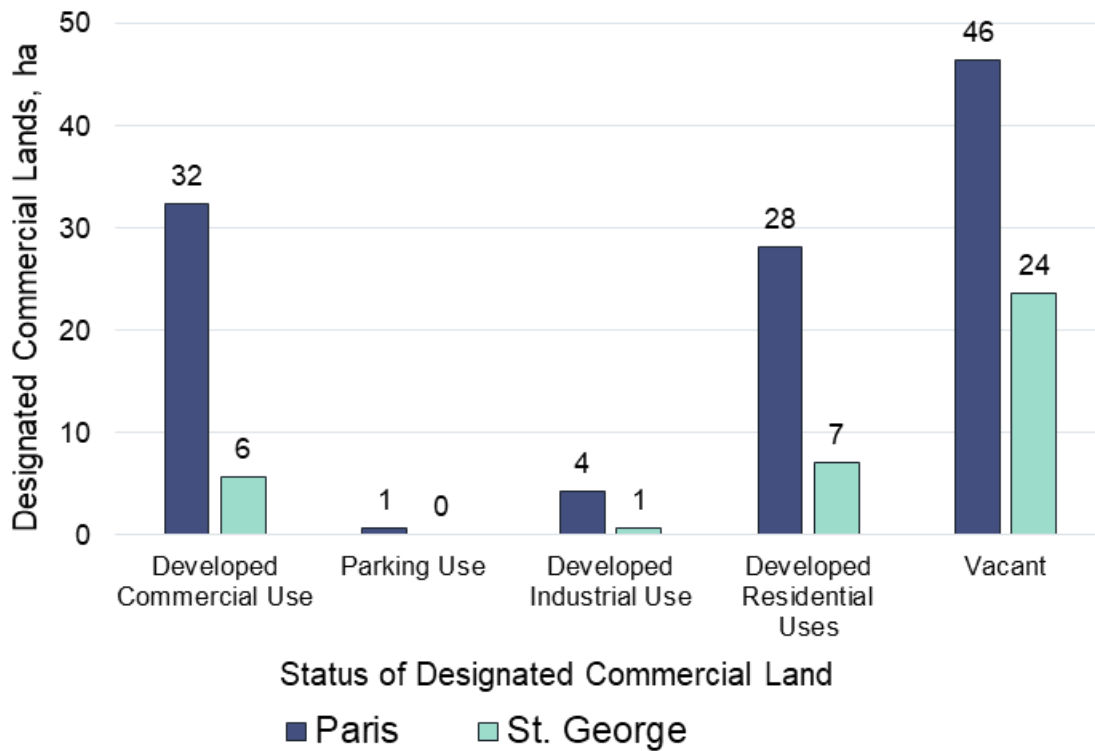
Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

6.7.4 Developed and Vacant Commercial Lands

Overall, the County has approximately 149 ha of designated commercial land in St. George and Paris. Figure 6-34 summarizes the status of designated commercial lands within these settlement areas. As summarized in Figure 6-33, the County has 32 ha and 6 ha of developed commercial lands in Paris and St. George, respectively. It is estimated that the vacant commercial land supply represents nearly half (47%) the designated commercial land supply. In addition, a large component of the designated commercial land supply includes lands that are currently occupied by rural single detached dwellings, which over the forecast horizon may provide opportunities for additional commercial development.



Figure 6-34
County of Brant
Status of Designated Commercial Land
Paris and St. George as of January 2021



Source: Watson & Associates Economists Ltd. as of January 2021 based on a desktop review of aerial imagery and site visits.

Appendix G provides mapping on the designated commercial land supply, while Appendix F provides details on the commercial building space on developed commercial lands.

6.7.5 Disruptors and Outlook for Commercial Growth

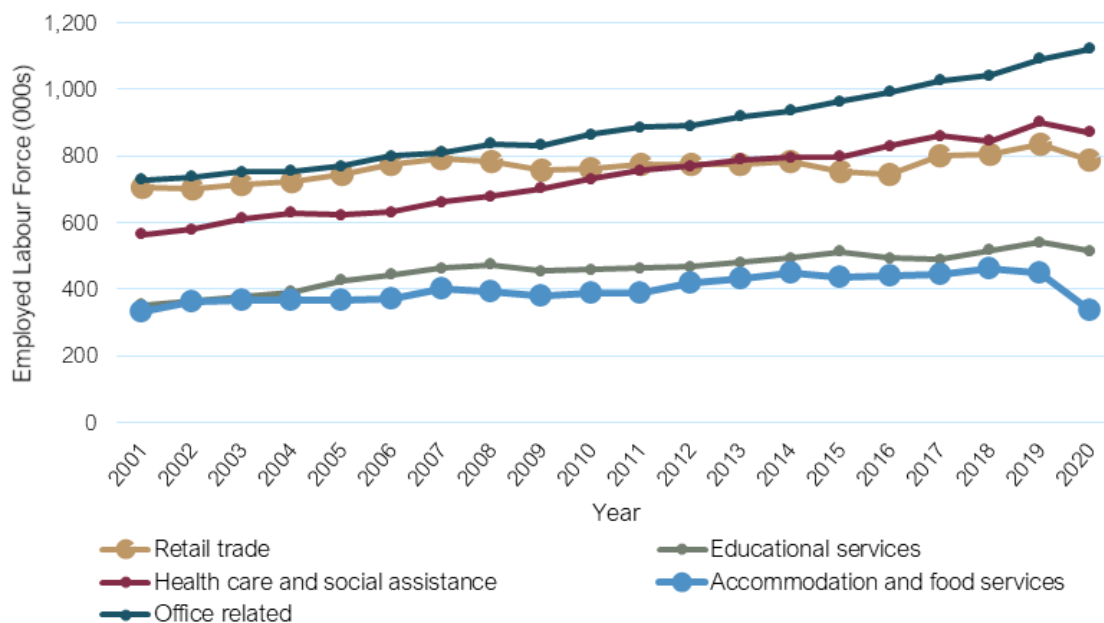
There are a number of major retail trends influencing the commercial landscape across the Country, which generally will influence the demand for retail and commercial space within the County of Brant. These trends are discussed below.



6.7.5.1 Labour Trends in Population-Related Employment Sectors in Ontario

Figure 6-35 summarizes employment growth trends within P.R.E. sectors over the past two decades (i.e., 2001 to 2020). As shown, employment within the retail trade sector has remained relatively stable over the period, while office-related and health care and social assistance have grown and become larger components of the employment base in Ontario. The expansion of these sectors has resulted in an increase of health-care practices and a rise in the number of office tenants within shopping centres and retail plazas that provide convenient locations to their clients. These sectors typically can accommodate up to 30% or 40% of the gross leasable area (G.L.A.) space of a retail site. Other than office-based sectors, all sectors have experienced a decline in labour force between 2019 and 2020 as a result of the COVID-19 pandemic. This decline has been most evident in the accommodation and food services sector which had generally remained steady since 2001.

Figure 6-35
Ontario
Labour Force Employment by Population-Related Sectors
2001 to 2020



Source: Derived from Statistics Canada Table 14-10-0023-01 by Watson & Associates Economists Ltd., 2021.



6.7.5.2 E-Commerce Retail Sales

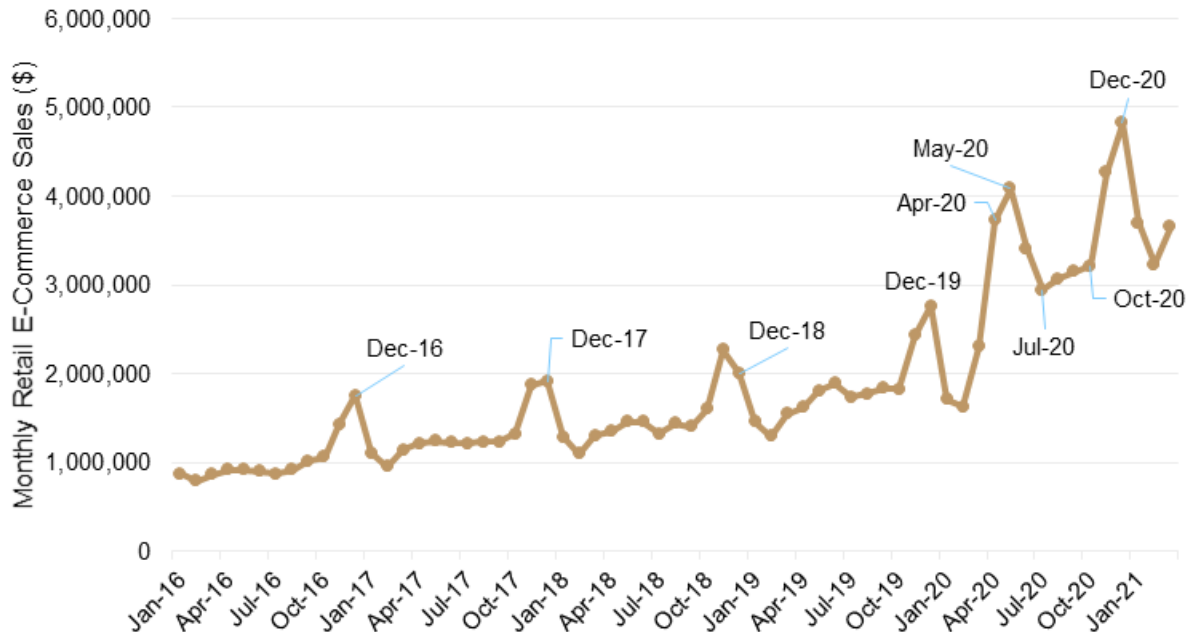
Figure 6-36 illustrates the monthly e-commerce retail sales since 2016. Since that time, e-commerce sales have increased significantly; between January 2016 and January 2021, there has been an increase of 322% in overall retail e-commerce sales. The COVID-19 lockdown which involved the temporary closure of stores in the second quarter of 2020 and during the first half of 2021, resulted in a significant increase in e-commerce spending. May 2020 represented the largest single-month increase in non-seasonal (excluding November and December) e-commerce spending in Canada. Canada is one of the largest e-commerce markets in the world and depending on the source is often placed within the top ten by country in terms of e-commerce sales, ahead of Russia, Spain, Italy and Brazil.¹ Retail e-commerce sales have risen steadily in Canada, with the proportion of online sales to total retail trade rising from 2.4% in 2016 to 7.8% percent in December 2020.² It is anticipated that e-commerce levels will eventually drop with the gradual re-opening of stores, restaurants and other service commercial uses in Canada post the COVID-19 pandemic. Further, the recent announcement by the Canadian government that it will ease the quarantine requirements for fully vaccinated international travellers bodes well for the hardest hit travel and hospitality sector. The digital impact of retail sales is even greater with mobile purchasing platforms (e.g., uberEats, Skip the Dishes) that support retail sales of local retailers by providing alternative platforms for purchasing products and services.

¹ Due to the variation of e-commerce reporting by country, there is no standard reporting. Various publications cited Canada often within the top ten. Sources with publications on e-commerce reporting include eMarketer, Forbes, Statista and J.P. Morgan Chase Bank.

² Statistics Canada, Retail Trade, December 2020, released February 19, 2021.



Figure 6-36
Canada
Monthly Canadian E-commerce Sales
January 2016 to January 2021



Source: Derived from Statistics Canada, Canadian Monthly E-Commerce sales, January 2016 to January 2021 by Watson & Associates Economists Ltd., 2021.

6.7.5.3 Service-Based Commercial Uses Leading Commercial Growth

The rise of e-commerce has influenced the demand for retail square footage, in particular the demand for retail goods. While e-commerce has been capturing market share from goods-based retailers, growth in service-based retailers continues as they provide social experiences and other services that cannot be purchased remotely. Further, mobile delivery platforms, such as Skip the Dishes and uberEats, are extending the customer reach of food service establishments, including adding convenience for food service establishments that do not offer their own delivery service. Service-based retailers typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-based retailers are driving the intensification of retail plazas, power centres and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers.



6.7.5.4 Innovation in Retail Platforms and Delivery

As previously discussed, technology, specifically e-commerce, is providing opportunities for retail and service establishments to better reach customers. In addition, technology is also providing opportunities for innovation in retail platforms. Beyond bricks-and-mortar retail buildings, retailers and service providers are also investing in self-serve kiosks and providing retail platforms on wheels, such as trucks converted to libraries to reach customers and provide access to library resources and staff assistance.

The automation of retail stores is anticipated to have an impact on the function of bricks-and-mortar retail stores, blurring the lines between warehousing and retail. Retailers are utilizing technology used in warehousing to improve profitability, including using robotics to track inventory and automating transactions. The key objectives of increasing automation in a retail store are to increase profitability and enhance convenience for customers. Convenience is typically tied to the dominant mode of traffic to the store and is focused on reducing the time a customer spends at the store. Walmart Canada, for example, recently renovated an existing Scarborough store with a 22,000 sq.ft. (2,000 sq.m) fully automated fulfillment centre where customers drive up to automated kiosks that can serve more than five customers at a time.

6.7.5.5 Increasing Productivity of Retail Stores

Retailers are embracing the concept of “just-in-time retail” which involves using the latest technologies in controlling product inventory and applying scheduling techniques to provide the same product assortment with less real-estate square footage.

While “sales per square foot (sq.ft.)” has been a typical measuring metric for store performance, retailers are now also evaluating store performance based on meeting other corporate objectives, including enabling e-commerce sales or creating a showroom for brand experiences.

6.7.5.6 Small Store and “Right-Size” Store Format

The majority of Canada’s top retail players (e.g., Canadian Tire, Sobeys, and Loblaw), which have traditionally been “big-box” retailers, have developed small-store prototypes that range in size from 5,000 to 20,000 sq.ft. (460 to 1,860 sq.m). The small-store prototype is about serving a more defined targeted demographic from a smaller local trading area and pursuing infill opportunities that may have been overlooked in the past.



The small-store footprint provides developers with greater flexibility in incorporating retail into mixed-use developments and small infill retail sites.

With the exit of large retailers from Canada within the past decade (e.g., Sears, Target, and Future Shop), retail property owners are redeveloping or breaking up big-box retail buildings into multiple retail units. Further, over the past few years, retailers have been rationalizing retail networks which has led to some store closures and downsizing of leased space to a “right-sized” footprint (i.e., leased space is being subdivided).

6.7.5.7 Redeveloping and Re-Purposing Aging Retail Sites

As the retail base is evolving, the retail-built forms of mature retail areas are becoming less desirable and require new building forms and a new tenant mix. As a result, municipalities and developers across Canada are exploring opportunities for the redevelopment of aging retail sites to other uses (i.e., mixed use) or other retail development concepts.

6.7.5.8 Farmgate Retail in the Rural Area

Farmgate retail businesses are market outlets on agriculture land where farmers sell agricultural and craft products directly to the consumer, local restaurants and caterers. Farmgate retail can range from a produce stand to an all-season store. Farmgate retail has become an increasingly important component of rural tourism and commerce, especially within the County of Brant. Farmgate provides an opportunity for urban residents to connect with farmers, while providing an opportunity for farmers to supplement income with another revenue stream that contributes towards the long-term sustainability of farming. Provincial policies support this type of activity. The P.P.S., 2020 supports on-farm diversified uses which allow farms to explore options for generating income to help support agriculture for the long term. O.P. policies and zoning by-laws accommodating this form of rural commerce range across the G.G.H. The County of Brant O.P.’s supports and permits small-scale farmgate retail with some conditions.¹

¹ County of Brant Official Plan, 2012, Policy 1.11.2.6.2, p. 1-16.



6.7.6 National Commercial Outlook

Since the early 2000s, retail growth in Canada has primarily focused on infilling existing retail sites through “baby-box” retail pads (smaller retailers with a similar building design to big-box retailers) in power centres, expansions of regional shopping centres and retail growth oriented towards serving the local needs of a neighbourhood. National and regional retail trends suggest that retail growth will continue through infilling efforts on existing retail sites, with an emphasis on retail uses focused on local-serving uses (e.g., food store, pharmacy), experiences (e.g., food services, escape rooms and bars), services (e.g., tutoring centres, dry cleaning, daycare, hair salon and medical/dental offices) and “bargain hunting” retail destinations with no e-commerce platforms (e.g., Dollarama, HomeSense and Winners). These retail uses tend to have a smaller retail footprint ranging from 1,500 sq.ft. (140 sq.m) up to 40,000 sq.ft. (3,700 sq.m) which provides more flexibility in accommodating mixed-use or intensification environments.

The anticipated population growth in the County of Brant will continue to support demand for new local-serving retail, as consumers do not want to travel far to buy these products. Accommodating local-serving retail uses that contribute towards building walkable communities should be a key objective in planning for intensification as well as greenfield areas. Despite the population growth anticipated, other retail uses that are more comparison based (e.g., general merchandise, apparel, furniture and electronics) are expected to grow at a slower pace due to proximity to the City of Brantford and national retail trends.

As previously discussed, e-commerce and automation of retail stores is anticipated to have an impact on the function of bricks-and-mortar retail stores, blurring the lines between warehousing and retail. Planning for retail uses will require a need to focus not only on the type of use, but a review of any secondary functions such as warehousing.

6.8 Community Area Commercial Land Needs to 2051

The following section reviews the commercial demand requirements in Paris and St. George and provides an assessment of whether there is a significant supply of designated commercial lands to accommodate commercial demand. It is important to recognize that this commercial analysis is a sub-set of Community Area land requirements. The purpose of this analysis is to determine whether changes are required within the Community Area to accommodate commercial growth.



6.8.1 Paris Settlement Area

As previously discussed, the Paris Settlement Area has a low commercial vacancy rate and a commercial base primarily oriented towards local-serving retail uses, such as grocery stores, drug stores, restaurants and personal services. Over the forecast horizon, the Paris Settlement Area is anticipated to require 535,000 sq.ft. (49,700 sq.m) of additional commercial building space, approximately 18,000 sq.ft. (1,700 sq.m) of building space annually. Furthermore, over the forecast horizon, the per capita commercial space ratio (commercial space relative to population) is anticipated to increase from 41 sq.ft. of commercial space per resident to 45 sq.ft. (4 sq.m) per resident. Growth on commercial sites is anticipated to comprise local-serving retail uses, as well as institutional uses, such as medical/dental offices. While the per capita commercial space is low relative to other comparable communities in the G.G.H., it is important to recognize the national commercial trends such as e-commerce, which reduce the need for commercial space.

Figure 6-37
Paris Settlement Area
Commercial G.L.A. Space Demand (sq.ft.), 2021 to 2051

Period	Population	Commercial G.L.A. Space (sq.ft.)	Per Capita Commercial Space (sq.ft. per resident)
2021	14,400	596,000	41
2031	18,800	796,000	42
2041	21,900	950,000	43
2051	25,400	1,131,000	45
2021-2051	11,000	535,000	49

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-38, approximately 119,000 sq.ft. (11,000 sq.m) of commercial building space is anticipated to be accommodated on existing developed sites (intensification), while 416,000 sq.ft. (38,600 sq.m) is anticipated to be accommodated on new lands.



Figure 6-38
Paris Settlement Area
Commercial G.L.A. Building Space, Intensification and Demand on New Lands,
2021 to 2051

Period	Commercial G.L.A. Space (sq.ft.)	Commercial Growth Accommodated Through Intensification (sq.ft.)	Commercial G.L.A. Demand on New Lands (sq.ft.)
2021-2051	535,000	119,000	416,000

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-39, based on building coverage of 25% (the ratio of the building footprint relative to required land area to support the development), there is a demand for 15 ha of designated commercial land. Based on the existing supply of 46 ha of designated commercial land in Paris, there is more than enough designated commercial land to support the commercial growth forecast over the planning horizon. As a result, there is a surplus of 31 ha of designated commercial lands.

Figure 6-39
Paris Settlement Area
Commercial Land Requirement (ha), 2021 to 2051

Period	Commercial G.L.A. Demand on New Lands (sq.ft.)	Commercial Building Coverage	Commercial Land Demand (ha)	Commercial Land Supply (ha)	Commercial Land Surplus (ha)
2021-2051	416,000	25%	15	46	31

Source: Watson & Associates Economists Ltd.

6.8.2 St. George Settlement Area

As previously discussed, the Paris Settlement Area has a low commercial vacancy rate and a small commercial base. Residents within St. George would generally require frequent shopping trips outside the community to support commercial needs. As summarized in Figure 6-40, over the forecast horizon, the St. George Settlement Area is anticipated to require 165,000 sq.ft. (15,000 sq.m) of additional commercial building



space, approximately 5,500 sq.ft. (510 sq.m) of building space annually. Furthermore, over the forecast horizon, the per capita commercial space ratio (commercial space relative to population) is anticipated to increase from 26 sq.ft. (2.4 sq.m) of commercial space per resident to 34 sq.ft. (3 sq.m) per resident. Growth on commercial sites is anticipated to comprise local-serving retail uses, as well as institutional uses such as medical/dental offices. While the per capita commercial space is low relative to other comparable communities in the G.G.H., it is important to recognize the proximity of St. George to larger urban centres such as Paris.

Figure 6-40
St. George Settlement Area
Commercial G.L.A. Space Demand (sq.ft.), 2021 to 2051

Period	Population	Commercial G.L.A. Space, (sq.ft.)	Per Capita Commercial Space (sq.ft. per resident)
2021	3,500	90,000	26
2031	4,300	120,000	28
2041	6,000	192,000	32
2051	7,500	255,000	34
2021-2051	4,000	165,000	41

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-41, approximately 27,000 sq.ft. (2,500 sq.m) of commercial building space is anticipated to be accommodated on existing developed sites (intensification), while 138,000 sq.ft. (12,800 sq.m) is anticipated to be accommodated on new lands.



Figure 6-41
St. George Settlement Area
Commercial G.L.A. Building Space, Intensification and Demand on New Lands,
2021 to 2051

Period	Commercial G.L.A. Space, (sq.ft.)	Commercial Growth Accommodated Through Intensification (sq.ft.)	Commercial Demand on New Lands (sq.ft.)
2021-2051	165,000	27,000	138,000

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-42, based on building coverage of 25% (the ratio of the building footprint relative to required land area to support the development), there is a demand for 5 ha of designated commercial land. Based on the existing supply of 24 ha of designated commercial land in St. George, there is more than enough designated commercial land to support the commercial growth forecast over the planning horizon. As a result, there is a surplus of 18 ha of designated commercial lands.

Figure 6-42
St. George Settlement Area
Commercial Land Requirement (ha), 2021 to 2051

Period	Commercial G.L.A. Demand on New Lands (sq.ft.)	Commercial Building Coverage	Commercial Land Demand (ha)	Commercial Land Supply (ha)	Commercial Land Surplus (ha)
2021-2051	138,000	25%	5	24	18

Source: Watson & Associates Economists Ltd.

6.8.3 Urban Commercial Land Requirement

The County of Brant has a surplus of approximately 49 ha of designated urban commercial land to accommodate the commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.



6.9 Employment Area Overview

6.9.1 County of Brant Official Plan Employment Area Policies

As per section 3.12 of the County O.P., the Employment designation applies to land that is comprised of or intended to be developed for light, heavy and prestige industrial uses, limited-service commercial uses, and related uses. Other uses permitted within the Employment designation include hotels/motels in cases where the employment lands have frontage on an arterial road, commercial recreational uses, and agricultural uses. Uses not permitted include institutional, general commercial, and large format retail.

In accordance with section 3.12.3 of the O.P., save and except for land identified as Site Specific Policy Area 16 in section 4.2.16 of this Plan (Priority Employment Areas), the County may permit conversion of land designated Employment to non-employment uses without an M.C.R. or Area Study subject to meeting the conditions mentioned in the section.

6.9.1.1 County of Brant Official Plan Employment Policies

In addition to Employment Area policies in section 3.12, there are certain site-specific policy areas identified within the O.P. These include the following:

6.9.1.1.1 Site Specific Policy Area 2 – Cainsville/Brant East Employment Lands

These lands include the Employment designated areas in the settlement area of Cainsville/Brant East. Industrial development shall only occur on these lands after the provision of full services.

6.9.1.1.2 Site Specific Policy Area 15 – Oakhill/Airport Area

Site Specific Policy Area 15 includes lands within the Oakhill/Airport Area, and the area including and abutting the Brantford Airport as identified in Schedule A of the O.P. For these lands, the permitted use shall be limited to uses that have limited or restricted outside storage, light industrial uses and may also include workshops, warehouses, service shops, commercial land uses such as office supplies, home furnishings and appliances, veterinary offices, funeral homes, assembly halls and recreational facilities. All development on the lands should include prestige site design characteristics.



It is further noted in the O.P. that the Brantford Municipal Airport is a multi-use facility owned and operated by the City of Brantford and the restrictions noted in Site Specific Policy Area 15 are not intended to impact upon the operations of the Brantford Airport.

6.9.1.1.3 Site Specific Policy Area 22 – St. George Employment Designation

The Employment Area in St. George has been identified as providing no municipal wastewater services. Accordingly, permitted uses in the Employment Area are required to have regard to partial services and do not result in excessive amounts of wastewater. Dry industrial and employment uses with minimal wastewater produced from industrial processing, washing, cooling or other purposes are to be considered for this area. It is noted that the zoning by-law will specifically define the dry employment and industrial uses that are permitted in this area. It is further noted that the County will encourage the application of water conservation technologies as well as low-impact development principles.¹

6.9.1.1.4 Site Specific Policy Area 16 - Priority Employment Areas

As part of the M.C.R. of Employment Lands (2009), it was established that there are more vacant employment lands within the County than what is required to meet the needs within the planning period. The areas identified as priority Employment Areas include certain Employment designated areas (including the Paris 403 Business Park, the Highway 25 and Highway 403 Employment Area, and the Paris Southeast Employment Area) and have been identified in Schedule A of the O.P.

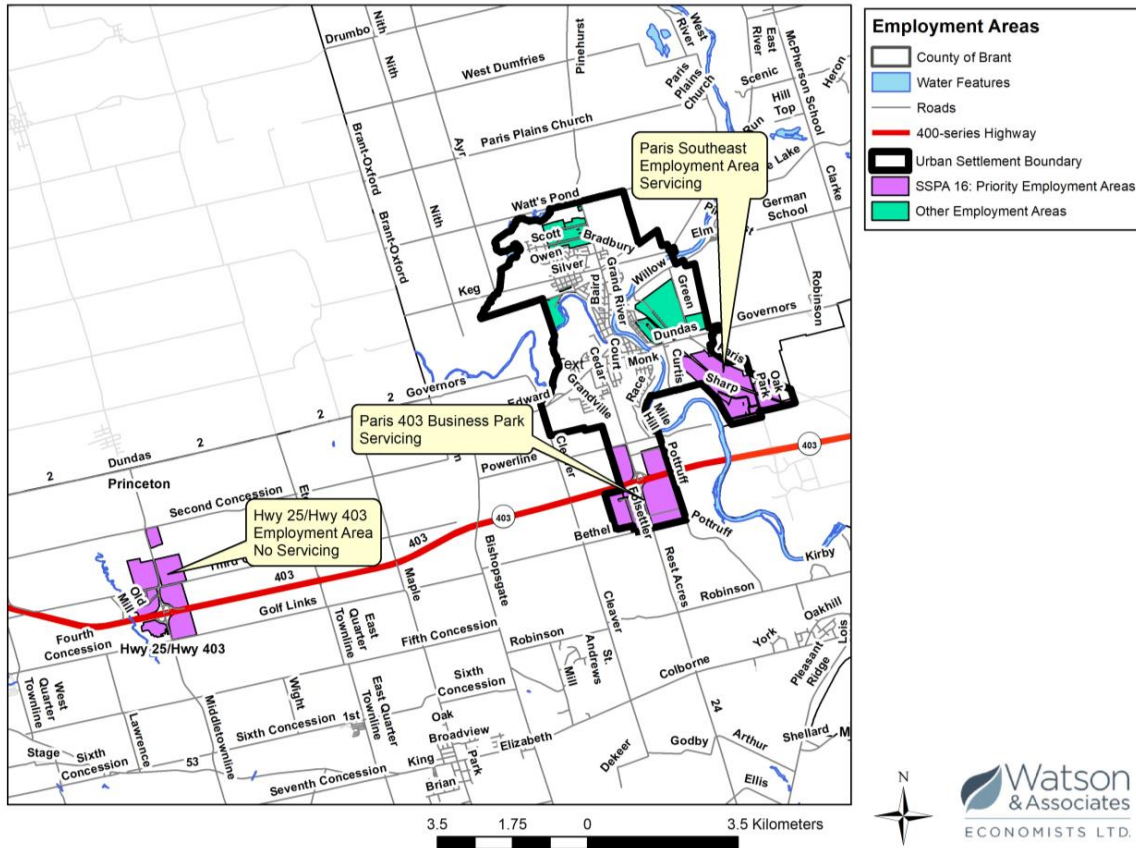
These areas are intended to have a greater level of protection from conversion to non-employment uses and an M.C.R and Area Study shall be required prior to the consideration of a change from Employment to another land use. The lands included as Special Policy Area 16, located along the Highway 403 corridor, have been identified as a priority for employment uses related to green energy technology.

Figure 6-43 provides the location of the Priority Employment Areas.

¹ County of Brant Official Plan, 2021, Policy 4.1.22., pp. 5-8 and 5-9.



Figure 6-43
County of Brant
S.S.P.A. 16 – Priority Employment Areas



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

6.9.2 Characteristics of the County of Brant's Employment Areas

The County's Employment Area base is comprised of a blend of Employment Areas with full servicing, partial servicing (water only) and private services (i.e., no water and wastewater municipal servicing). Employment Areas in Paris provide full municipal servicing and opportunities to accommodate additional serviced employment sites. While St. George is a part of the County's urban system, the Employment Area in St. George currently contains water only servicing. Employment Areas in the Rural System, including Cainsville and the Airport Employment Area have servicing, but there



are currently limitations on servicing. The Cainsville Employment Area is anticipated to expand municipal servicing to accommodate new development.¹

Employment Areas in Paris provide urban amenities that compete with Urban Employment Areas in the G.G.H., including Employment Areas with arterial road and highway access, as well as park/recreational and commercial amenities in proximity to Employment Areas.

6.9.3 Employment Area Land Supply Inventory Approach

In generating this employment land inventory, all parcels designated in the County's O.P. as "Employment" have been reviewed. The supply review was carried out in accordance with the provincial L.N.A. The analysis was completed primarily through a desktop review using G.I.S. mapping software and the review and assistance of County of Brant staff. Spatial overlays utilized to develop the land supply inventory included parcel fabric, land-use layers (including the County of Brant O.P. designation layers), non-residential building permit data, building footprints, hydrology/wetlands and orthophotos. A third-party data source, InfoCanada Business Directory, was utilized to estimate employment and employment density on developed sites.

It is important to note that the land supply includes the parcel as well as internal infrastructure such as local roads and stormwater ponds. The land supply excludes environmental features (Natural Heritage System), highways, utilities corridors and cemeteries. As noted, the supply analysis was completed in accordance with provincial L.N.A. requirements.

Employment lands are considered developed if a building permit has been issued by January 1, 2021 and the land is anticipated to be occupied with employment by mid-2021. It is important to note that sites are identified as occupied if there is a building on the parcel or a permit has been issued as of January 1, 2021.

As part of the analysis, Watson with assistance with the County of Brant staff identified sites that would likely remain undeveloped by 2051 due to site constraints such as parcels with no existing/planned roads. Sites where environmental and/or topography features may reduce marketability were also discounted from the inventory. As an

¹ Expansion of municipal servicing is currently under review by the County as part of an agreement with the City of Brantford.



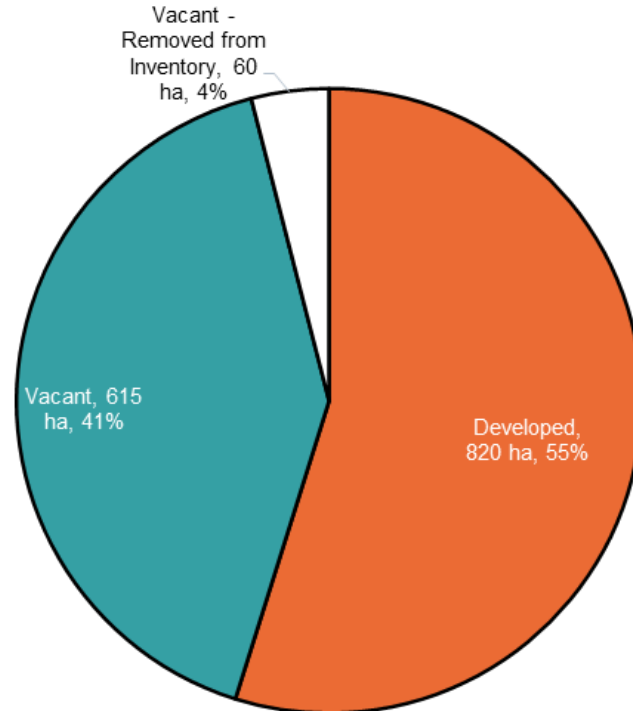
example, the Employment Area near the former landfill and railway line in the west Paris area has been removed from the inventory. In total, approximately 60 ha of designated Employment Area land has been removed from the County's Employment Area land supply inventory.

The land supply review includes all parcels designated as Employment in the County's O.P. The Urban Employment Area land needs includes only those designated within the settlement area of Paris and St. George in accordance with the provincial L.N.A. Employment Areas outside the Paris and St. George area considered Rural Employment Areas are not required to be identified in terms of land requirements. The expansion of Rural Employment Areas as discussed in Chapter 8 is reviewed based on different provincial policy requirements and considerations.

As summarized in Figure 6-44, the County has approximately 1,500 ha of designated Employment Area land (occupied/vacant) and approximately 55% of the land inventory is occupied/developed. Employment Area land supply mapping is provided in Appendix H (Urban) and Appendix J (Rural).



Figure 6-44
County of Brant
Designated Employment Areas
Land Supply by Supply Status (ha), 2021



Source: Watson & Associates Economists Ltd.

6.9.3.1 *Employment Area Classification*

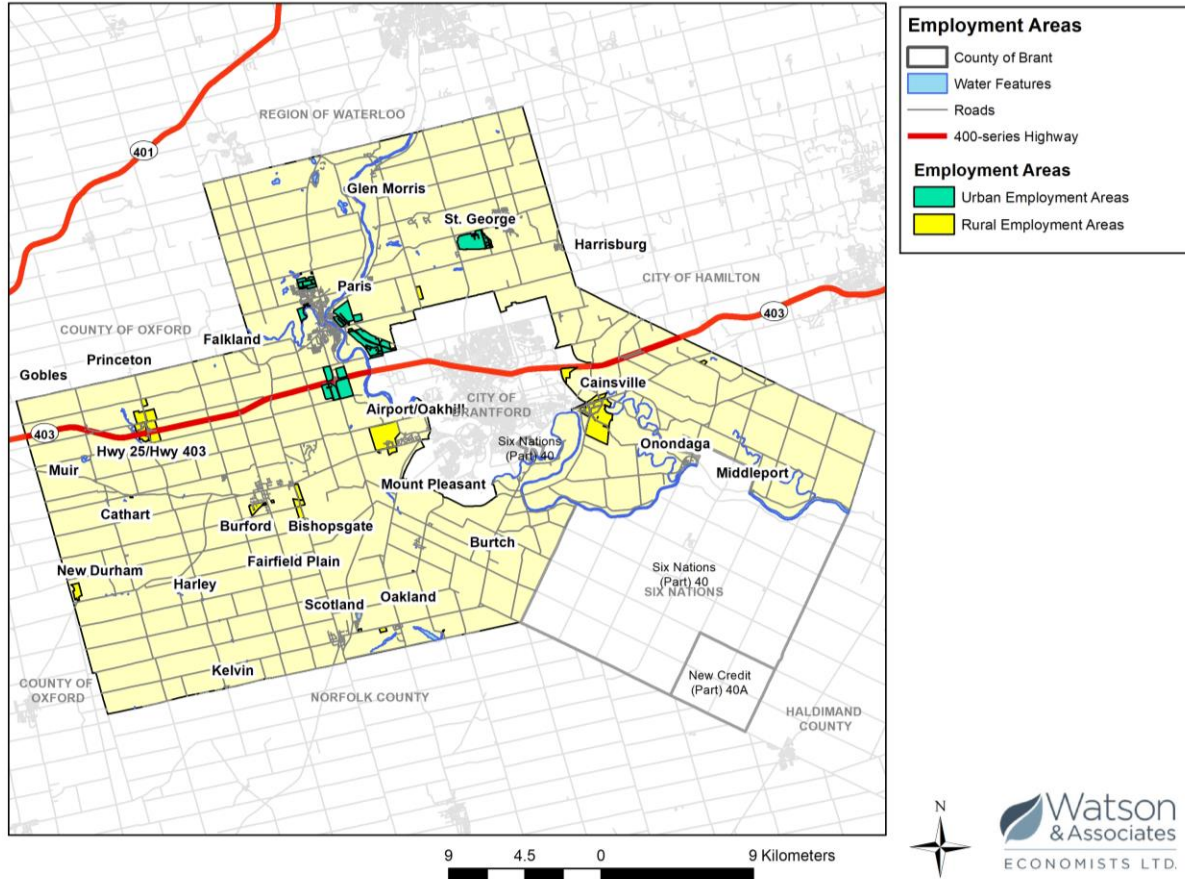
As previously noted, the County's Employment Area Land Supply is classified in two broad categories:

- Urban Employment Areas – Paris and St. George; and
- Rural Employment Areas – Cainsville Employment Area; Burford Employment Area; Highway 25/Highway 403 Employment Area; Airport Employment Area; and New Durham Employment Area.

Figure 6-45 illustrates the location of Urban Employment Areas (identified in green) and Rural Employment Areas (identified in yellow).



Figure 6-45
County of Brant
Existing Designated Employment Areas



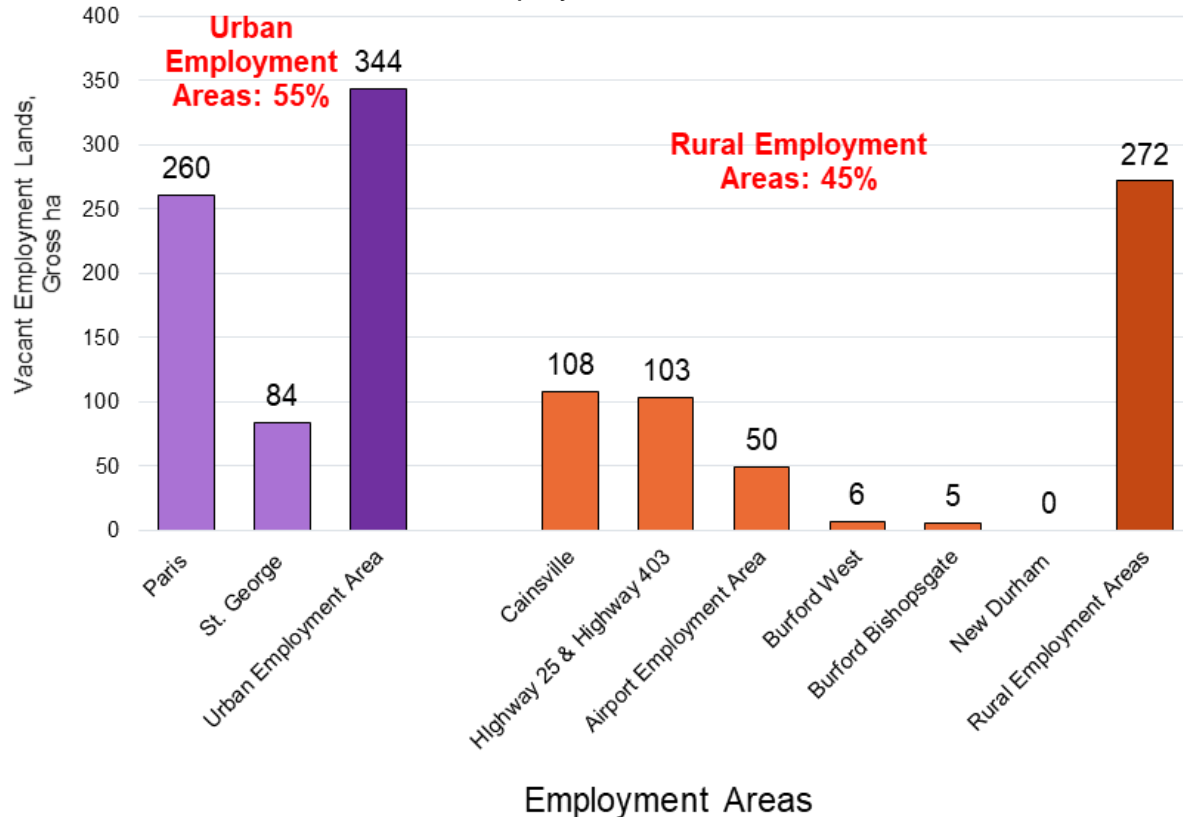
Source: Watson & Associates Economists Ltd.

6.9.3.2 County-wide Employment Area Inventory by Employment Area

As of January 1, 2021, the County has a land supply of 615 ha of vacant designated lands in Employment Areas. Approximately 344 ha of designated land is available within the Urban System (Paris and St. George), as identified in Figure 6-46. As of January 1, 2021, approximately 356 ha of Employment Area land in Paris and St. George was developed.



Figure 6-46
County of Brant
Designated Employment Areas
Vacant Employment Lands, Gross ha



Note: Gross land area calculated in accordance with requirements of the Growth Plan.
Source: Watson & Associates Economists Ltd.

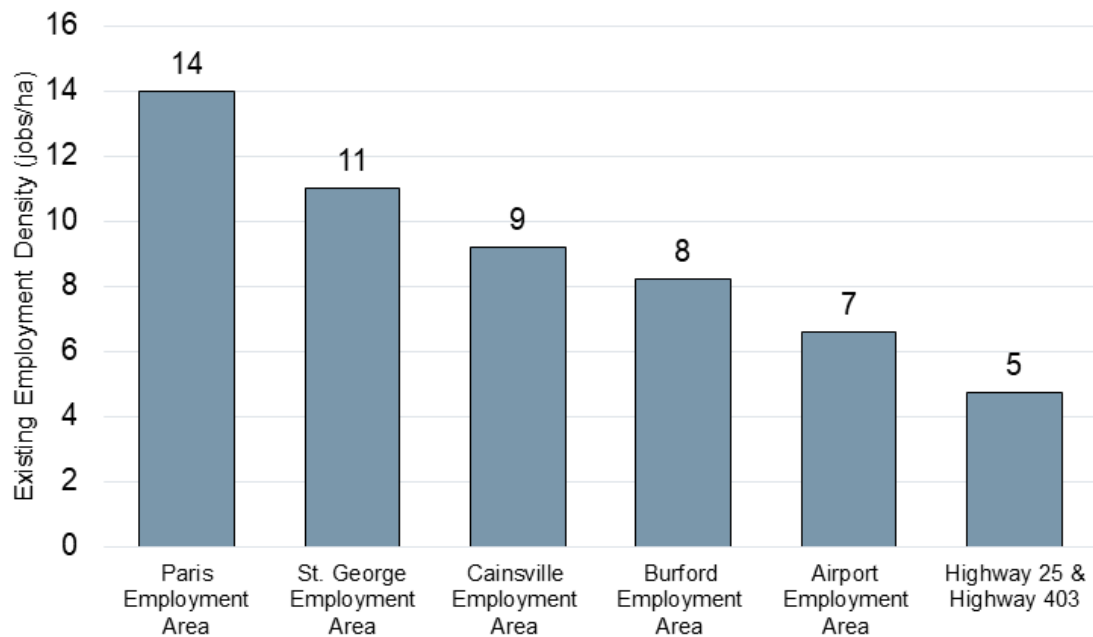
6.9.3.3 Employment Area Density

As summarized in Figure 6-47, the existing employment density in the County's Employment Areas ranges from 5 jobs/gross ha in the Highway 25/Highway 403 Employment Area to 14 jobs/gross ha in Paris (15 jobs/net ha). Over the past decade, the average employment density on recently absorbed parcels has generally been lower or near the existing density average. This can be largely attributed to a few land-extensive industrial developments in Paris. Within Paris, the Southeast Employment Area has the highest Employment Area density at 23 jobs/gross ha. The higher employment density is largely attributed to long-established major manufacturing employers, including Tigercat and Patriot Forge, as well as businesses on small



parcels. Of the developed parcels in Paris, less than a third (approximately 29%) of developed parcels have a density higher than 14 jobs/gross ha and most of these parcels were developed more than a decade ago.

Figure 6-47
County of Brant
Employment Area Employment Density (jobs/gross ha)
by Employment Area 2021



Source: Watson & Associates Economists Ltd. based on InfoCanada Business Database and developed sites identified by Watson.



Figure 6-48
County of Brant
Employment Area Employment Density (jobs/gross ha)
Paris and St. George

Employment Areas	2021 Developed (gross ha)	2021 Employment Estimates	Employment Density (jobs/gross ha)
Paris Employment Areas	339	4,700	14
St. George Employment Areas	49	560	11
Urban Employment Areas	389	5,260	14
Rural Employment Areas	431	3,860	9
Total Employment Areas	820	9,120	11

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.

There are two diverging trends across the G.G.H. which are influencing average density trends on employment lands. On the one hand, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive warehousing and logistics facilities to support distribution and transportation of goods throughout the rapidly expanding G.G.H. population base.

On the other hand, growing demand within the multi-tenant industrial/commercial uses (including small-scale office) with a range of diverse employment uses is anticipated to have a modest upward influence on average employment densities on employment lands over the long term.

In accordance with the broader density discussed above, it is anticipated that employment densities on employment lands in Paris and St. George will be comparable to existing density levels over the long term (i.e., 2051).

6.9.3.4 Historical Urban Employment Area Land Absorption

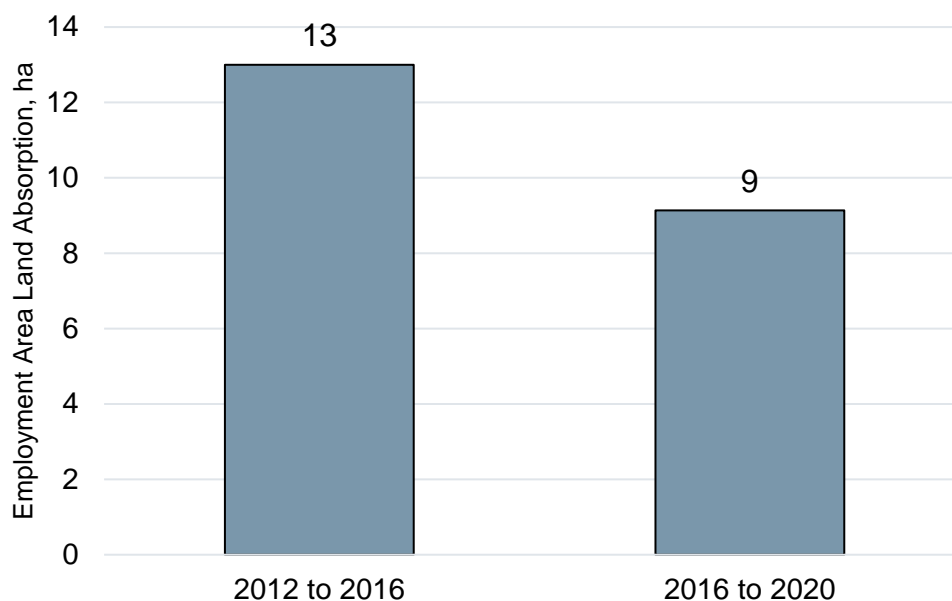
Figure 6-49 provides a summary of the annual Employment Area land absorption in Paris over the 2012 to 2016 period and over the most recent few years (2016 to 2020).



Employment Area land absorption averaged 13 ha annually over the 2012 to 2016 period. In 2012, the Paris 403 Business Park opened for development. Two years after the opening of the Paris 403 Business Park, absorption totalled 48 ha. Since 2016, Employment Area land absorption averaged 9 ha annually. Absorption was primarily concentrated in the Paris Southeast Employment Area and the Paris 403 Business Park, specifically the lands to the southwest of Rest Acres/Highway 403.

Since 2012, Employment Area land absorption within the St. George Employment Area has been minimal.

Figure 6-49
County of Brant
Paris Employment Areas
Average Annual Employment Area Land Absorption (ha), 2012 to 2020



Source: Watson & Associates Economists Ltd.

6.9.3.5 *Urban Employment Areas in Paris*

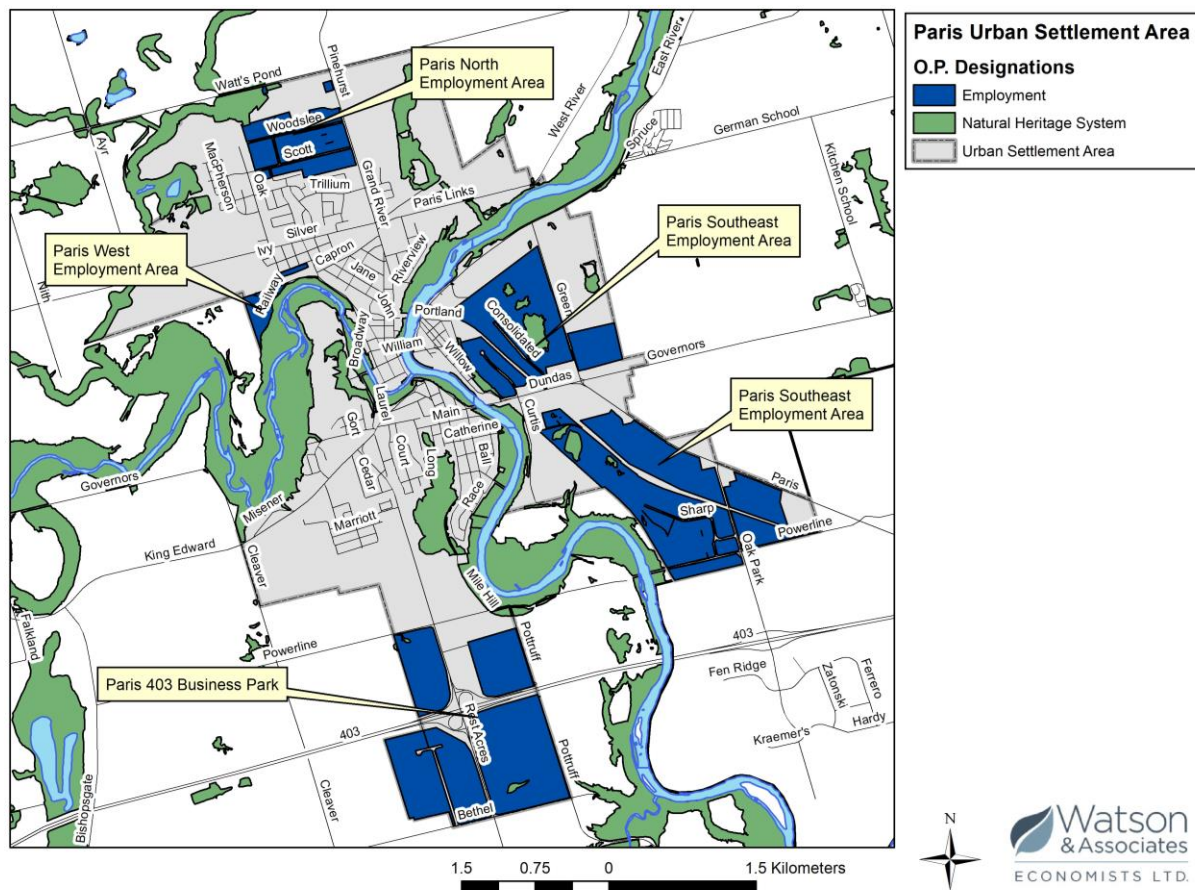
Figure 6-50 provides a map of the location of Employment Areas in Paris and includes the following five Employment Areas:

- Paris North Employment;



- Paris Southeast Employment Area;
- Paris West Employment Area; and
- Paris 403 Business Park.

Figure 6-50
County of Brant
Designated Employment Areas in Paris Settlement Area
Location of Employment Areas



Provided below is a brief description of the Employment Areas.

Paris North Employment Area

The North Paris Employment Area is a mature Employment Area of approximately 62 gross ha located in the north-end of Paris. The Employment Area is located west of Grand River Street North. The Employment Area has approximately 10 ha of vacant



Employment Area land and accommodates a mix of industrial sectors, as well as commercial uses.

Large employers in this Employment Area include Miss Mary Maxim (craft supply distributor) and Pinty's Delicious Foods Inc. (food distributor). Most businesses in this Employment Area are small and medium-sized employers with less than 50 employees and no parcel exceeds 5 ha in size.

Paris West Employment Area

The Paris West Employment Area is a mature Employment Area located near the railway yard and former landfill in Paris. The Employment Area accommodates a small employment base on a few small parcels. The developable land area of this Employment Area is small, i.e., less than 20 ha. Due to site constraints (topography and environmental features) this Employment Area offers no vacant parcels for development. Employers in this area include Paris Kitchens (cabinet manufacturer) and a few small businesses.

Paris Southeast Employment Area

The Paris Southeast Employment Area is a mature Employment Area with 107 ha of vacant Employment Area lands with a range of parcel sizes available. This Employment Area includes a diverse range of businesses, including heavy and light industrial uses. A designated commercial area separates the Employment Area into two areas along the major arterial street, Dundas Street. The adjacent commercial area also provides commercial uses that support the function of the Employment Area, including restaurants, a motel and a cardlock facility. The Paris Southeast Employment Area provides opportunities for intensification on large, underutilized parcels. Intensification potential mapping is provided in Appendix I.

Major employers include Tigercat (equipment manufacturer), Patriot Forge Inc. (steel fabricator) and CoorsTek Paris (ceramics manufacturer). Other employers include a range of small and medium businesses in construction, logistics/warehousing/trucking and manufacturing.



Paris 403 Business Park

The Paris 403 Business Park is the newest Employment Area in Paris (opening in 2012) and is surrounded by the 403 Highway/Rest Acres Road interchange. The Employment Area is approximately 220 ha in area, with approximately 143 ha of undeveloped land. Since 2012, the majority of Employment Area land absorption in Paris has occurred in this Employment Area. Given the proximity and access to the Highway 403 interchange, the Paris 403 Business Park provides opportunities for prestige Employment Area uses.

Major employers include Adidas (sporting goods warehouse operation) and BGI Retail (display stand manufacturer), Scotlynn Commodities (transportation provider) and an Ontario Provincial Police Station.

6.9.3.6 Urban Employment Areas in St. George

Figure 6-51 provides a map of the location of Employment Areas in St. George. Within St. George there is a large Employment Area (Site Specific Policy Area 22) with water-only servicing and one fragmented employment land site, Site Specific Policy Area 17. Site Specific Policy Area 17 is the former Parmalat industrial site. In addition, to employment uses, this site permits residential uses. Since this site permits non-Employment Area uses, it has been excluded from the land supply inventory.

Employment Area, S.S.P.A. 22 has been identified in the current County's O.P. (2012) as not planned to accommodate wastewater services. Permitted uses are limited to dry employment and industrial uses that are appropriate for partial services and do not result in excessive amounts of wastewater. Dry industrial and employment uses are considered to be those in which the principal source of wastewater is related to domestic purposes, and minimal wastewater is produced from industrial processing, washing, cooling or other purposes.¹ Occupied uses in this Employment Area include small businesses with generally less than 30 employees per establishment.

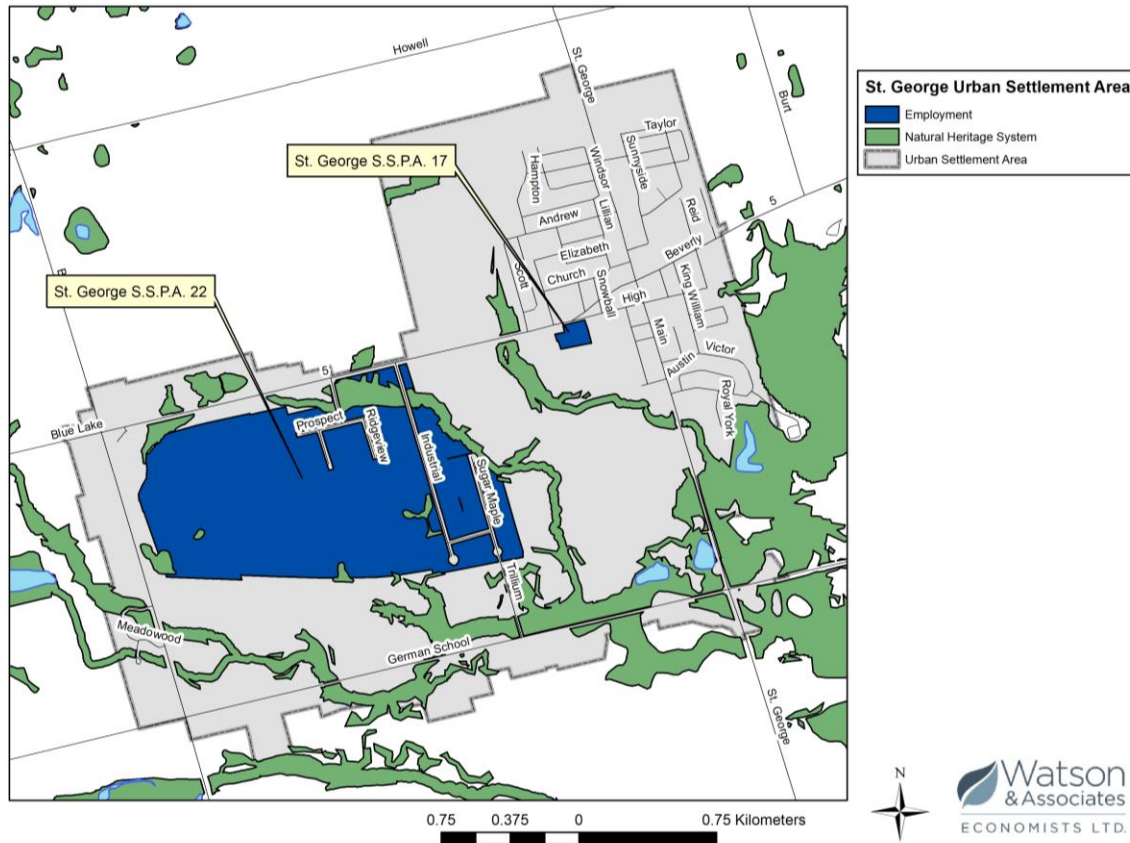
St. George has approximately 84 ha of vacant Employment Area land. It is important to recognize that large tracts of land currently do not have road access. As a result, a

¹ County of Brant Official Plan, 2012, Policy 4.1.22, p. 5-8.



portion (western extent) of the designated land area has been removed from the vacant supply inventory.

Figure 6-51
County of Brant
Designated Employment Areas in St. George Settlement Area
Location of Employment Areas



6.9.4 Developed and Vacant Urban Employment Area Lands

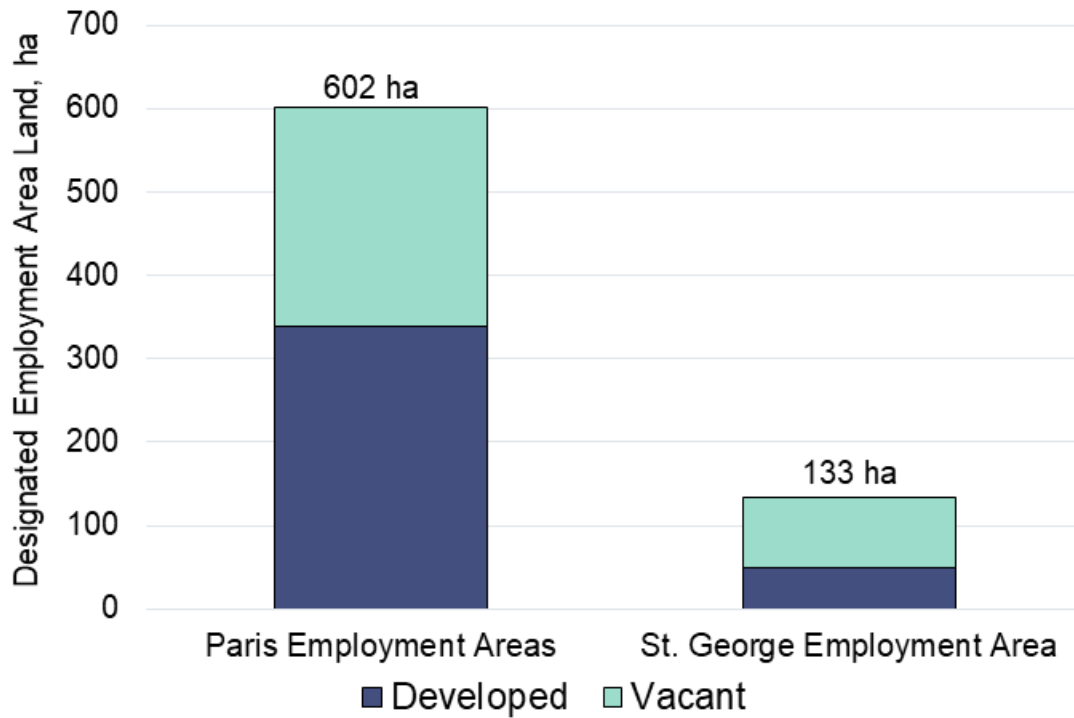
Figures 6-52 and 6-53 provide details on the Employment Area land supply in the County's Urban Employment Areas. Key highlights include the following:

- Paris has a designated Employment Area land supply of 602 ha and approximately 44% of the designated land area is vacant;
- St. George has a designated Employment Area land supply of 133 ha and approximately 62% of the designated land area is vacant; and



- Most of the vacant land supply is comprised of large parcels in Paris and St. George, larger than 10 ha.

Figure 6-52
County of Brant
Developed and Vacant Urban Employment Area Land Supply



Source: Watson & Associates Economists Ltd.



Figure 6-53a
County of Brant
Paris Employment Areas
Vacant Urban Employment Land Supply by Parcel Size

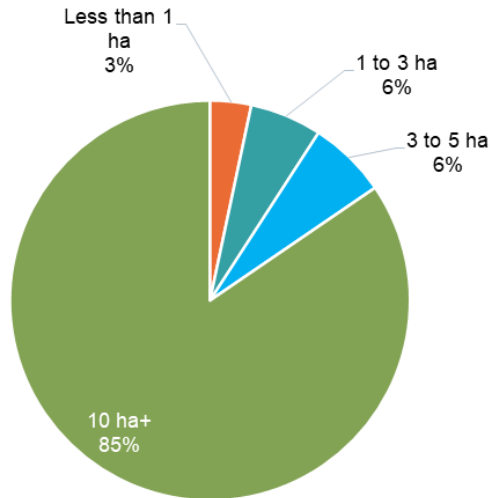
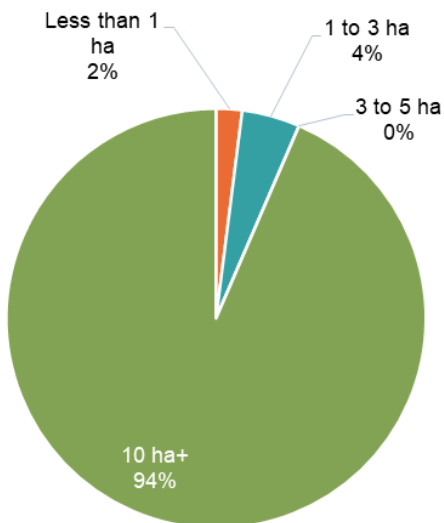


Figure 6-53b
County of Brant
St. George Employment Area
Vacant Urban Employment Land Supply by Parcel Size



Source: Watson & Associates Economists Ltd.



6.9.5 Urban Land Vacancy Allowance Adjustment

This allowance is a necessary downward adjustment to land supply, in order to reflect the fact that 100% of any large area of employment lands is unlikely to be absorbed in the foreseeable future. There are various reasons for this occurring, including:

- parcels have become landlocked or difficult to access, with poor road visibility;
- parcels are held off the market for speculative reasons, such as selective marketing, expansion of an adjacent site, long term land banking or proposed land-use conversion;
- parcels are unusually expensive to service;
- sites are inefficient in size/shape; and
- sites have physical constraints (i.e., poor soil conditions and sites which have unattractive surroundings or potential land-use conflicts).

Figure 6-54 summarizes the land vacancy adjustment for Paris and St. George. A land vacancy adjustment of 15% was assumed for the Paris Employment Areas. As a result, approximately 39 ha of vacant employment land supply has been reduced. A higher land vacancy adjustment of 30% was assumed for the St. George Employment Area reflecting the limitations of the St. George Employment Area due to water-only servicing. Approximately 25 ha have been removed from the St. George Employment Area land supply inventory.

Figure 6-54
County of Brant
Urban Employment Area
Adjusted Vacant Employment Supply

Vacant Employment Area Land	Paris	St. George	Paris & St. George
Supply, gross ha (Vacant)	260	84	344
Land Vacancy Adjustment	15%	30%	19%
Land Vacant Adjustment, deducted, gross ha	39	25	64
Adjusted Land Supply, gross ha	221	58	280

Source: Watson & Associates Economists Ltd.



6.9.6 Intensification Potential in Paris Urban Employment Areas

As part of the land supply review, a review of intensification potential was carried out for the Paris Employment Areas. Employment Areas in Paris have full municipal servicing (water/wastewater). Using G.I.S. parcel fabric data and orthophotos, underutilized employment land parcels were identified in Paris. Parcels with low building coverage of less than 10% and employment lands used for parking and storage were identified as underutilized. It is important to note that the review of the intensification potential on employment lands was carried out as a desktop review and is based on a single criterion, building coverage. This review is considered the first step in understanding the County's intensification potential.

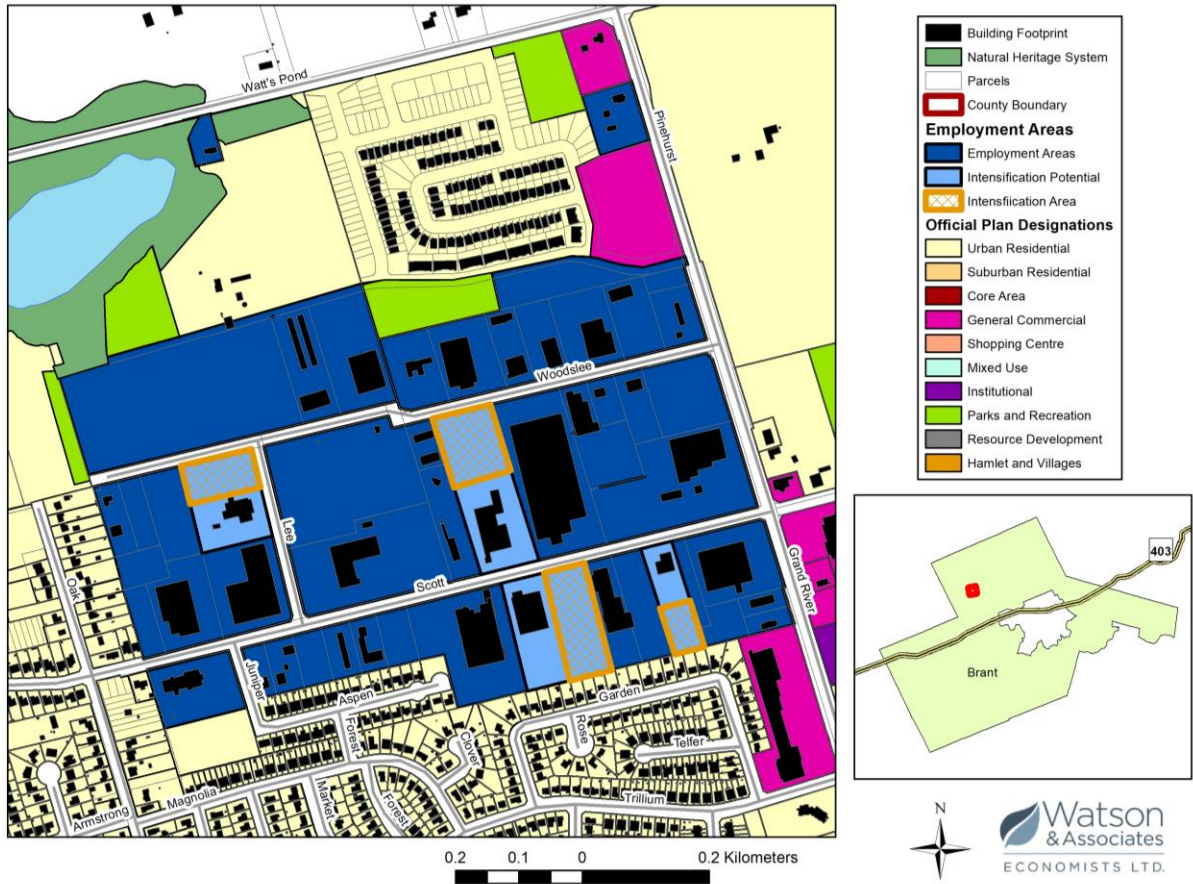
Forms of intensification could include the following:

- Expansion of an existing building;
- Subdividing of a parcel; and
- Redevelopment of a parcel with a higher yielding employment use.

Figures 6-55a through to 6-55d provide mapping of the parcels identified for intensification. Potential parcels are highlighted in light blue and overlaid is a potential intensification area within the parcel (identified by an orange crosshatch).



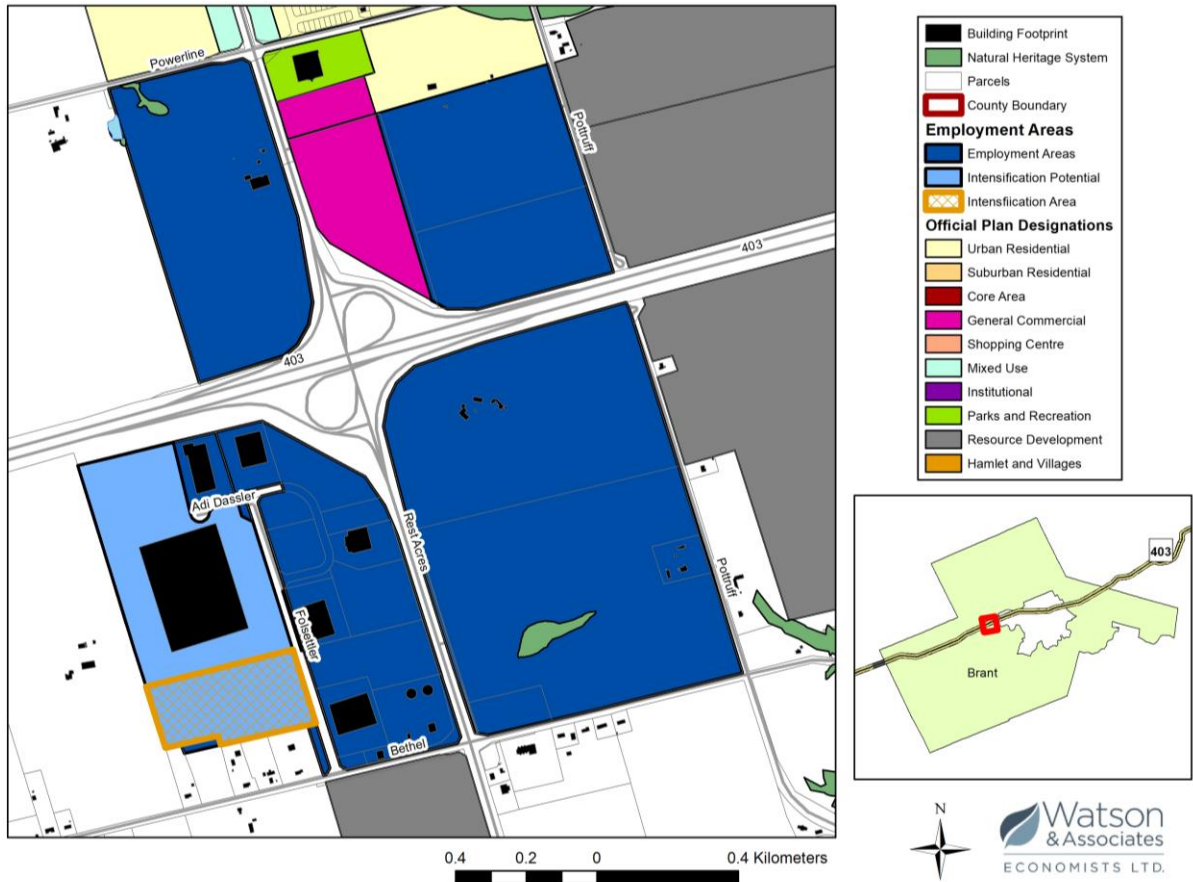
Figure 6-55a
County of Brant
Paris North Employment Area
Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



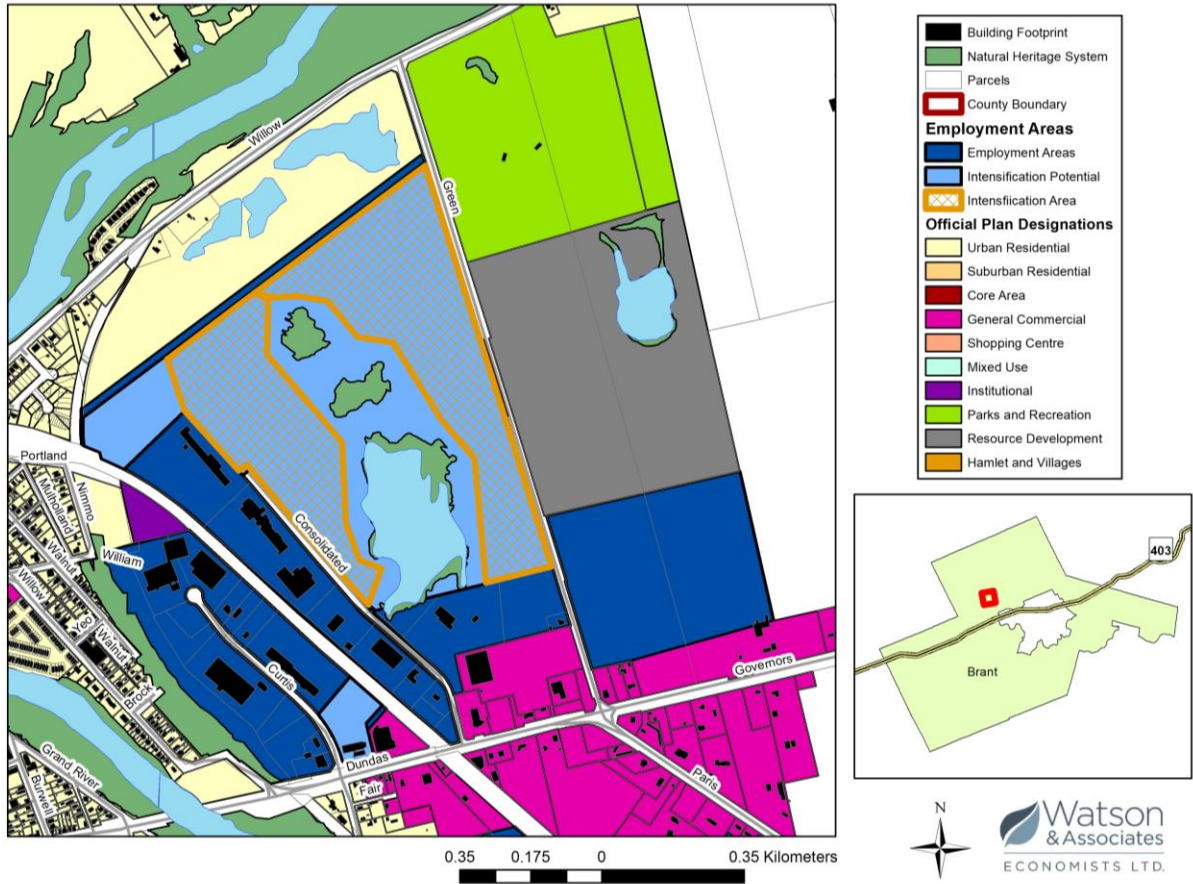
Figure 6-55b
County of Brant
Paris 403 Business Park
Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



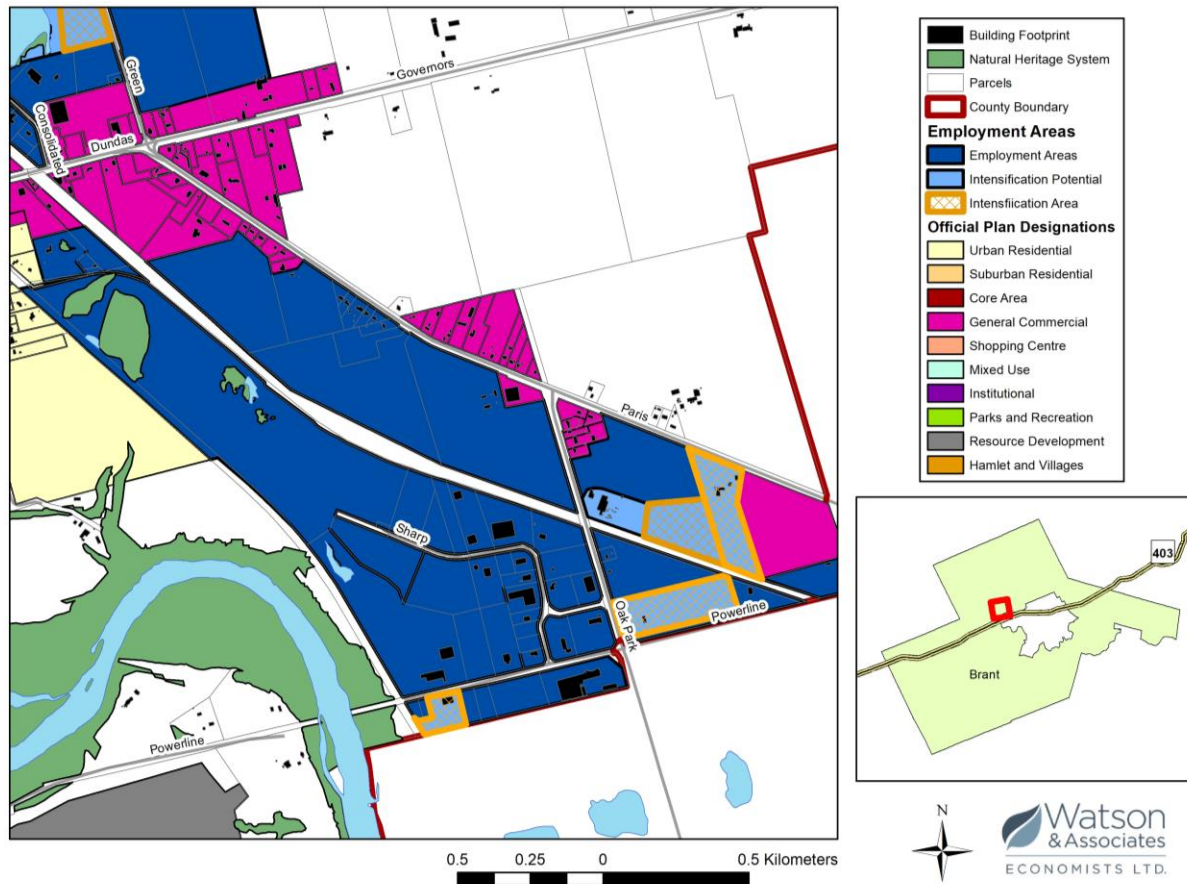
Figure 6-55c
County of Brant
Paris Southeast Employment Area – North Portion
Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Figure 6-55d
County of Brant
Paris Southeast Employment Area – South Portion
Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

It is estimated that there is potential for intensification on approximately 70 ha of designated Employment Area land (areas identified in the mapping in the orange crosshatch). The Southeast Employment Area provides the greatest potential for development.

As summarized in Figure 6-56, approximately 37 ha or 53% of the intensification land area is applied to the land needs calculation over the forecast horizon. This assumption reduces the demand for development on vacant lands by 10% (i.e., 10% of land demand to be accommodated through intensification).



Figure 6-56
County of Brant
Urban Employment Area
Intensification Potential in Paris

Intensification Potential, ha	Paris
Intensification Potential Identified, ha	70
Intensification Applied to Demand, ha	37
Portion of Intensification Potential Applied to Demand (%)	53%

Source: Watson & Associates Economists Ltd.

6.10 Planning for Employment Areas

As previously mentioned, structural changes in the economy are modifying the character of economic activities in Employment Areas and impacting their built form and character. In recognizing these recent structural changes in the regional economy, there is a need for the City to ensure that the amount, type, and location of Brant's established and planned Employment Areas are well aligned with anticipated market demand. This requires that near-term (i.e., shovel-ready lands) and longer-term land needs are adequately addressed. It also requires that the County's Employment Areas be uniquely planned and designed to accommodate a range of traditional industrial sectors related to manufacturing, Goods Movement, construction, and utilities.

6.10.1 Planning for Industrial Sectors

A number of emerging industrial sectors are anticipated to influence the demand for employment lands in Brant across a wide range of uses. Advanced manufacturing is evolving and is requiring integrated operations on larger sites in a "campus-style" setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics, and on-site manufacturing.

As previously mentioned, the Goods Movement sector is evolving and responding to consumer demands, as e-commerce is growing in Canada. Emerging Goods Movement uses in Brant are anticipated to include warehousing facilities requiring specialized functions that focus on serving the expanding urban population within the local and surrounding area. Key requirements include improvements to accessibility to



the labour force, such as public transportation and buildings with a range of design options.

6.10.2 Planning for Goods Movement Sectors

As previously mentioned, recent industrial development activity across the G.T.H.A. and beyond has been driven by rising demand in the Goods Movement sector. Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas. Across North America, the Goods Movement industry is continuously evolving at a rapid pace. As previously mentioned, e-commerce and technological improvements represent the biggest drivers of change in the Goods Movement industry, driven by the rapid growth of mobile technology. Key considerations in planning for the Goods Movement sector include the following:

- Just-in-time manufacturing will continue to be the industry norm, placing increasing emphasis on more frequent and smaller deliveries by truck transport, typically during the last mile. As the e-commerce market continues to expand, this component of the supply chain is becoming increasingly important to businesses as it has a direct influence on the customer experience. In addition to the need to provide timely, accurate service delivery, it is also critical for the industry to ensure cost efficiency given that 30 per cent to over 50 per cent of total parcel delivery cost are associated with this leg of the supply chain.
- To overcome potential cost challenges, industries are acquiring properties in ideal urban locations and adaptively redeveloping existing buildings to create a new industrial product type: the urban warehouse. The features of the urban warehouse are as varied as the locations in which they are located, and often depend on the amount of goods being distributed. Unlike traditional fulfillment centers that grow horizontally, urban warehouses grow vertically with either high, clear heights or multi-level configurations that utilize complex automated material handling systems. By emphasizing volume of storage as opposed to area, high land prices can be spread across a greater storage capacity.
- Automation of distribution centres allows for more vertical storage; however, the need for numerous loading bays will dictate land requirements, and the industry



trend is for more and more bays at facilities. Using automated logistics solutions and robotic systems improves efficiency and reduces the requirement for daylight or height limits of warehouse space, thus allowing for more vertical storage. Vertical storage and increased automation also reduces the distance inside warehouses, further speeding up the delivery process.

- Autonomous trucking technology is currently being tested worldwide. A key driver of this technology is the reduction of transportation costs (i.e. labour) combined with improved road safety. Although the full implementation of driverless trucks remains far ahead in the future, advances in technology have come quicker than expected. Autonomous trucking technology is likely to affect industrial real estate in several ways. Lower transportation costs are anticipated to drive the need for fewer, but larger, consolidated warehouses in locations where land costs are lower. Typically, the larger the property, the lower the average employment density.
- Locations close to multi-modal facilities continue to be very attractive with access to rail – this is generating increased demand for larger-scale logistics hubs. Core components of integrated intermodal terminals, often referred to as freight hubs or freight villages, include general warehousing/storage, distribution centres, transshipment facilities, vehicle maintenance/repair services, and transportation/logistics uses.

6.10.3 Planning for Knowledge-Based Sectors

As previously noted, recent market demand on employment lands has been increasingly driven by growth in knowledge-based or creative class economies. As these sectors continue to grow, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming increasingly dominant built forms within Employment Areas.

Accommodating new development and expansions related to light industrial and office uses requires that Employment Areas are planned to achieve a compact, transit-supportive (e.g., connections to public transportation systems), and pedestrian-oriented environment with access to employment-supportive uses such as amenities, entertainment, cultural activities, and public spaces. At the same time, demand will continue to exist for industrial and commercial uses in prestige Employment Areas that offer ample land supply. For these Employment Areas, highway access and



exposure/visibility and design are critical, particularly for the corporate office component.

To address the broad needs of industry, a range of employment and commercial areas by site size, access, designation/zoning, and surrounding land use should be considered across a number of locations throughout Brant. In many cases, new major office/head offices accommodated in Employment Areas integrate industrial, office, and training facilities on site. Where feasible, prestige employment sites also provide significant land area to accommodate surface parking and, in some cases, future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than standalone major office developments. Given the unique operational requirements of these facilities, such uses often cannot be accommodated in downtown or mixed-use office settings. In industrial/business parks, prestige office uses are often positioned at gateway locations (i.e., at major highway interchanges) with direct highway access/exposure as well as strong connectivity to arterial roads, and offer live/work opportunities.

6.10.4 Planning for Employment-Supportive Uses

As industrial demand within the County's urban Employment Areas continues to increase for light industrial and knowledge-based uses, there will be increasing need to accommodate commercial service, retail and community/institutional uses. To varying degrees, ancillary uses such as restaurants, entertainment facilities and personal services (e.g. dry cleaners and service or repair shops) are permitted in Employment Areas with the intention to support and/or complement employment uses. Municipalities also typically accommodate select community/institutional uses such as recreation centres and emergency services facilities in Employment Areas. In some prestige Employment Areas, such uses are permitted in addition to core office and other stand-alone commercial uses such as hotels and convention centres.

Accommodating an adequate mix of supportive uses in Employment Areas, such as retail and personal services, can strengthen such areas by providing amenities and services to employees/employers. On the other hand, overly permissive policies related to employment-supportive uses, however, can lead to land-use conflicts (e.g. increased traffic congestion, safety, parking or off-site nuisances), competition with neighbouring commercial areas, upward influence on land values, fragmentation of the existing industrial land supply and/or erosion of Employment Areas.



When planning for Employment Areas, employment-supportive locations should be identified where services/amenities such as restaurants, personal services, medical offices and fitness centres can cluster together. The planning and development of these services/amenities in conjunction with the primary employment land uses helps improve the quality of life for employees by offering them access to services/amenities before or after work, or over lunch. In concert with this approach is the design of Employment Areas to be more pedestrian-, bicycle- and transit-friendly such that employees can easily access services/amenities, which helps to reduce the number and duration of trips via private automobile.

The inclusion of serviced commercial and employment-supportive uses relates to the desire to create more complete business parks or industrial areas, as well as to address transitional uses between industrial uses and adjacent Community Areas. Ultimately, the primary intention of employment-supportive uses in Employment Areas should be to serve the needs of employers and employees within the Employment Areas as opposed to the broader population. Though these uses are typically not land extensive, their inclusion in industrial areas could draw clientele from beyond the local area – particularly for services like health care, government, educational institutions or restaurants/drinking places – which could create unintended conflicts within the industrial area/business park. Accordingly, there is a balance needed in the accommodation of employment-supportive uses in Employment Areas, given the potential impacts these uses may have on the County.

6.10.5 Major Retail in Employment Areas

While non-industrial uses can directly support the function of Employment Areas, large freestanding retail uses can potentially create negative impacts on the surrounding industrial or employment uses, which in turn, may negatively impact the future prospects of an area for industrial development. Though large, freestanding, retail uses generate employment, they may also absorb large shares of land through their configuration or requirements (e.g., parking), draw considerable traffic from outside the immediate area (creating congestion in the industrial area), or affect the character of the Employment Area. As such, approaches should be developed to discourage major retail development in Employment Areas.



Under Growth Plan, 2019, employment land protection policies have been strengthened with respect to prohibiting uses such as major retail in Employment Areas. As a result, Growth Plan provides that, for any major retail uses that are permitted in Employment Areas, a municipality should establish a size or scale threshold for such use. The definition of major retail is not specified in Growth Plan or the P.P.S., 2020, as such restrictions for retail on employment lands vary across the G.G.H.

6.11 Urban Employment Area Land Needs to 2051

6.11.1 Urban Employment Area Land Demand to 2051

Over the forecast horizon, demand for Employment Area land is approximately 331 ha (11 ha annually) in Paris and 53 ha (2 ha annually) in St. George. As previously discussed, it is assumed that 10% of the Employment Area land demand in Paris will be accommodated on existing Employment Area sites through intensification. While a density of 14 jobs/ha is applied to new Employment Area lands, it is important to note that including the intensification adjustment, the overall Employment Area density for Paris would increase to 15 jobs/ha by 2051, as summarized in Figure 6-59. Figures 6-57 (Paris) and 6-58 (St. George) provide further details on the Employment Area land demand forecast to 2051.

Figure 6-57
County of Brant
Paris Urban Employment Area
Urban Employment Land Demand to 2051

Paris Employment Areas	Employment	Density (jobs/ha)	Land Area (ha)	Demand Adjusted for Intensification, ha	Annual Land Absorption, ha
Employment Land Employment (E.L.E.)	4,150	12	346	311	10
Population-Related Employment (P.R.E.)	975	45	22	16	1
Total Employment Area	5,125	14	368	331	11

Notes: May not add up precisely due to rounding. Intensification adjustment is 37 ha (Figure 6-56)

Source: Watson & Associates Economist Ltd.



Figure 6-58
County of Brant
St. George Urban Employment Area
Urban Employment Land Demand to 2051

St. George Employment Area	Employment	Density (jobs/ha)	Land Area (ha)	Demand Adjusted for Intensification, ha	Annual Land Absorption, ha
Employment Land Employment (E.L.E.)	540	11	51	51	2
Population-Related Employment (P.R.E.)	60	40	2	2	0
Total Employment Area	600	12	53	53	2

Notes: No intensification demand has been identified for St. George given that the Employment Area is water only servicing. May not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure 6-59
County of Brant
Urban Employment Area Density at 2051

	Paris Employment Areas	St. George Employment Area
Employment, 2021 (A)	4,700	560
Land Area, 2021 (B)	339	49
Density (jobs/ha) (C = A / B)	14	11
Employment, 2021 to 2051 (D)	5,100	600
Land Area, 2021 to 2051 (E)	368	53
Density (jobs/ha) (F = D / E)	14	11
Land Area, 2021 to 2051, Adjusted for Intensification (Paris, G = E x 10% = 37 ha adjustment)	331	53
Employment, 2051 (F = A + D)	9,800	1,160
Land Area, 2051 (G = B + E)	670	102
Density (jobs/ha) (H = F / G)	15	12

Source: Watson & Associates Economists Ltd.

6.11.2 Urban Employment Area Land Needs to 2051

As summarized in Figure 6-60, comparing Urban Employment Area demand in Paris against the current vacant land supply generates an Employment Area shortfall of approximately 110 gross ha. In contrast, a small Employment Area surplus of 5 ha has been identified in St. George. Overall, the need for an additional 105 ha of Employment Area land has been identified to accommodate forecast demand to the year 2051.

Figure 6-60
County of Brant
Urban Employment Area Land Needs to 2051

Urban Employment Area Land Needs	Paris	St. George	Paris & St. George
Employment Area Land Supply (adjusted), ha	221	58	280
Employment Area Land Demand, ha	331	53	384
Employment Land Needs, Shortfall, ha	(110)	5	(105)

Source: Watson & Associates Economists Ltd.



6.12 Observations

The long-term economic outlook for the County is very positive. As previously noted, as the local employment base and economy within the surrounding commuter-shed continues to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population and P.R.E. growth across the County.

Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated in neighbouring municipalities within the G.G.H. Outer Ring. As such, raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy will continue to be a key long-term economic development objective for the County of Brant. Achieving the County-wide employment forecast and allocations by settlement area (Paris and St. George) will also require significant investment and effort on behalf of both the public and private sector to attract and accommodate new employers and facilitate the expansion of existing businesses across a broad range of established and emerging employment sectors.

As previously noted, the County's competitive economic position is highly tied to its ability to attract and accommodate a growing skilled and unskilled labour force pool. To ensure that economic growth is not constrained by future labour shortages, effort will be required by the County of Brant and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

The County of Brant has a surplus of approximately 49 ha of designated urban commercial lands to accommodate the commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.

The County has a shortfall of designated Urban Employment Area lands of approximately 105 gross ha. The shortfall within Paris is approximately 110 ha, as St.



George has a small surplus of 5 gross ha. The County should explore options to add additional Urban Employment Areas, including expanding the settlement area boundary in Paris to accommodate additional Employment Area lands in the Paris 403 Business Park.



Chapter 7

Employment Area Conversions Review



7. Employment Area Conversions Review

7.1 What is an Employment Area Conversion?

Changes to the designation of a site designated in the County's O.P. as "Employment" to allow for uses not permitted for that designation, including residential, mixed-use and specific commercial uses, is considered an Employment Area land conversion. The conversion of Employment Area lands generally occurs during the M.C.R. process as there is a need to understand the broader impacts of the conversion under the policy framework of the Growth Plan, 2019 and the P.P.S., 2020, as well as local site-specific considerations. As part of this M.C.R., Employment Area conversion requests have been reviewed and evaluated.¹ Based on this review, a series of recommendations have been made with respect to a number of sites within the Urban and Rural Employment Areas where conversion requests have been submitted.

7.2 Policy Context

The Growth Plan, 2019 and the P.P.S, 2020 provide a framework for assessing the conversion of lands within Employment Areas. The following briefly summarizes the Growth Plan, 2019 policies in regard to Employment Area conversions (Policies 2.2.5.9 and 2.2.5.10).

Within an M.C.R.:

- Conversions of Employment Areas to non-employment uses may be permitted only through an M.C.R., where it is demonstrated that:
 - there is a need for the conversion;
 - the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
 - the municipality will maintain sufficient employment lands to accommodate forecast employment growth to the horizon of this Plan;
 - the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan; and

¹ Refer to sections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.



- there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.

Outside an M.C.R.:

- Lands within an existing Employment Area may be converted to non-employment uses outside a municipally initiated M.C.R. (until the next M.C.R.) where certain criterion can be met:
 - there is a need for the conversion;
 - the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan;
 - there are existing or planned infrastructure and public service facilities to accommodate the proposed uses;
 - the conversion must maintain a “significant number” of jobs on the subject lands through the establishment of a development criteria; and
 - the site must not be a part of a provincially significant employment zone (P.S.E.Z).

Subsection 2.2.5.11 of the Growth Plan, 2019 further states that any change to an O.P. to permit new or expanded opportunities for major retail in an Employment Area may only occur in accordance with Policy 2.2.5.9 or Policy 2.2.5.10, as previously summarized as the criteria for the M.C.R.

7.3 Approach

As part of its M.C.R. process, the County of Brant invited landowners to submit requests for properties that are currently designated for employment to be converted to permit non-employment uses. Submissions were due to the County by December 31, 2020. All requests have been reviewed and evaluated against the County's developed criteria for conversion considerations, which is based on provincial policies and County of Brant objectives. As indicated to landowners, there is no guarantee that requests will result in a staff recommendation and/or Council's decision to convert employment lands to non-employment uses.

In total, the County has received six formal submissions to convert specific Employment Area sites to non-employment uses, which comprise 107 ha of designated, vacant



Employment Area land. These lands have been evaluated based on the provincial framework, as well as a set of local criteria and principles drawing on the following:

- A review of best practices across the G.G.H.;
- Relevant provincial planning policies and supporting documents related to the Growth Plan, 2019 and the P.P.S., 2020; and
- The evolving nature of Employment Areas within the County of Brant with respect to land use, economy and transportation.

A series of local planning principles, listed below, have been established as part of the evaluation of Employment Area land conversions. These principles are meant to provide further rationale to guide the local employment conversion criteria. Again, it is noted that these principles were developed using policy directions and guidance from the P.P.S., 2020, the Growth Plan, 2019, as well as reference to best practices in protecting, planning, and developing employment lands.

1) Provide specifically designated Employment Area opportunities to establish themselves and their viability.

There are specific designated Employment Areas that have previously been designated through an exercise which resulted in Council approval (e.g., Council approved O.P.A., Secondary Plan, etc.) and because of externalities such as planning appeals, development agreements, funding agreements, municipal servicing, etc., they have not yet established their marketability, viability, and/or presence. A conversion request within these specific designated Employment Areas would be premature and potentially provide a barrier to the implementation of the Employment Area.

2) Protect Employment Areas in proximity to major transportation corridors and Goods Movement infrastructure to ensure businesses have access to a transportation network that safely and efficiently moves goods and services.

In contrast to other urban land uses (e.g., commercial, mixed-use and residential areas), Employment Areas provide the opportunity to accommodate industrial sectors that cannot be easily accommodated in other areas of the County. The Growth Plan, 2019 and the P.P.S., 2020 contain policies that protect Employment Areas in proximity to major Goods Movement facilities and corridors which require those locations. To continue to be competitive and attractive to a broad range of industrial and commercial



sectors, municipalities need to ensure that medium- to large-scale vacant sites have good access to trade corridors near major highway interchanges as well as other major Goods Movement and transportation facilities such as ports, rail yards, intermodal facilities, and airports.

3) The configuration, location, and contiguous nature of Employment Areas need to be maintained in order to prevent fragmentation and provide business-supportive environments.

Preserving the overall configuration, location, and contiguous nature of Employment Areas ensures the County can continue to be competitive and attractive to a broad range of industrial and commercial sectors. Potential risks of Employment Areas becoming fragmented over time are to be mitigated. Encouraging contiguous Employment Areas of critical mass supports market choice and municipal competitiveness, while also enabling businesses to establish relationships and synergies, thereby developing strong business-supportive environments to various scales (i.e., locally and regionally).

4) Provide a variety of Employment Area lands in order to improve market supply potential and regional attractiveness to a variety of employment sectors and business sizes.

Municipalities need to ensure a sufficient supply of municipally serviced (and/or serviceable) lands within Employment Areas, by location, access, site size, zoning, tenure, etc., are offered. This will ensure a sufficient market choice of designated Employment Areas is provided to accommodate a variety of employment sectors and business sizes. The County will need to ensure that it offers a diverse supply of employment land supply, including a range of parcel sizes.

5) Retain the employment and job potential of Employment Areas.

Recommended Employment Area conversion should maintain or improve the County's overall ratio of jobs to population (i.e., employment activity rate), without undermining the functionality and competitive position of existing Employment Areas.

6) Support efforts of transformative change in Brownfield Areas if it can be demonstrated that the site offers characteristics that support residential intensification and higher-density mixed-use development.



It is recognized that over time large abandoned industrial sites, i.e., brownfield sites, may provide opportunities for transformative change over the long term. Efforts that encourage transformative change on brownfield sites should be supported when it can be demonstrated that the employment conversion request supports residential intensification and higher-density mixed-use development (i.e., intensification node or corridor) as set out under the provincial and local Employment Area conversion framework described herein.

7) Align with County interests and policies related to Employment Areas in order to support achieving municipal goals and mandates of planning for, protecting, and preserving Employment Areas.

It is recognized that there are various municipal interests and policies related to Employment Areas that speak to planning for, protecting, and preserving Employment Areas. As such, the purpose of this principle is to align as best as possible to County mandates, goals, and objectives, for example, included in the County's Strategic Plan, O.P., Secondary Plans, etc., which provide insight related to the County's vision towards planning for, protecting, and preserving Employment Areas.

8) Limit and/or mitigate land-use incompatibilities where necessary.

The Growth Plan, 2019 and the P.P.S., 2020 contain policies that speak to avoiding or limiting land-use incompatibilities with sensitive land uses (e.g., residential uses, education and health care facilities, day care centres). Employment Areas may also accommodate industries that require adequate separation from sensitive land uses.

7.3.1 Localized Criteria Evaluation

As part of this M.C.R., a list of localized criteria was prepared to assess in evaluating Employment Area land conversions. Appendix K provides details of the localized criteria. The localized criteria consider the location, surrounding uses and compatibility of proposed conversion, quality of the site as an Employment Area, impact on the overall employment land supply, and municipal interests.

The following provides a summary of the criteria prepared:

- The site is in proximity and has access to major transportation corridors (e.g., highways, rail, cross-jurisdictional connections);



- The site is located outside or on the fringe of an assembly of an Employment Area;
- The site offers limited market supply potential for Employment Areas due to a range of issues (site configuration, size, access, physical conditions and servicing constraints, etc.);
- The proposed conversion to non-employment uses is compatible within surrounding land uses/and or could be mitigated from potential land-use conflicts;
- The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites;
- The conversion request is supporting the long-term prosperity of the County through redevelopment of a brownfield site that is no longer viable for Employment Area purposes. This site would retain the employment and job potential of the Employment Area;
- The conversion of the site to non-employment uses would not conflict with municipal interests and policies; and
- The conversion of the site would not cause cross-jurisdictional issues that cannot be overcome.

7.4 Employment Area Conversion Requests Reviewed

Figure 7-1 summarizes the Employment Area land conversion requests received and reviewed as part of this M.C.R. In total, six sites were reviewed (four site areas) representing approximately 107 vacant ha. Each of the submissions reviewed seek a land-use redesignation from Employment Area to Urban Community Area (i.e., residential and/or mixed use), within Paris and St. George. As previously discussed in Chapter 5, there is a significant surplus of Urban Community Area land, totalling 395 gross ha, in the County's D.G.A. lands within Paris and St. George. In addition, as discussed in Chapter 5, the B.U.A. offers an intensification potential to support a wide-range of housing options, including at-grade housing. Furthermore, as discussed in Chapter 6, the County has a shortfall of Employment Area land of 105 ha. As such, it is important to note any Employment Area conversion to a non-employment use will exacerbate this shortfall. Given the sufficiency of the County's potential long-term housing supply in both greenfield and intensification areas, there is not a demonstrated need to create additional Community Area land through the conversion of the County's Employment Areas.



Notwithstanding the sufficiency of the County's Community Area land supply, it is important that all vacant lands which form part of the County's Employment Area inventory are available, serviceable and marketable over the long-term planning horizon. If it is determined that a site is not feasible for Employment Area land development and the conversion of such a site supports the County's local planning principles, such lands will be considered for conversion regardless of long-term Community Area land need.

Figure 7-1
County of Brant
Conversion Request Sites Reviewed

Site	Site Location	Employment Area	Land Area, ha	Conversion Request
Site 1	67 Woodslee Ave.	Paris North Employment	4.2 ha	Mixed-Use Development
Site 2	326 Grand River St.	Paris North Employment	3.0 ha	Mixed-Use Commercial Development
Site 3a/ Site 3b	Sharp Rd.	Paris Southeast Employment Area	16.0 ha (approx.)	Urban Residential
Site 4a/ Site 4b	95 Old Onondaga Rd./North of 366 County Rd. 18	Cainsville Employment Area	84.0 ha	Urban Residential
Total County of Brant			107 ha	

Source: Watson & Associates Economists Ltd.

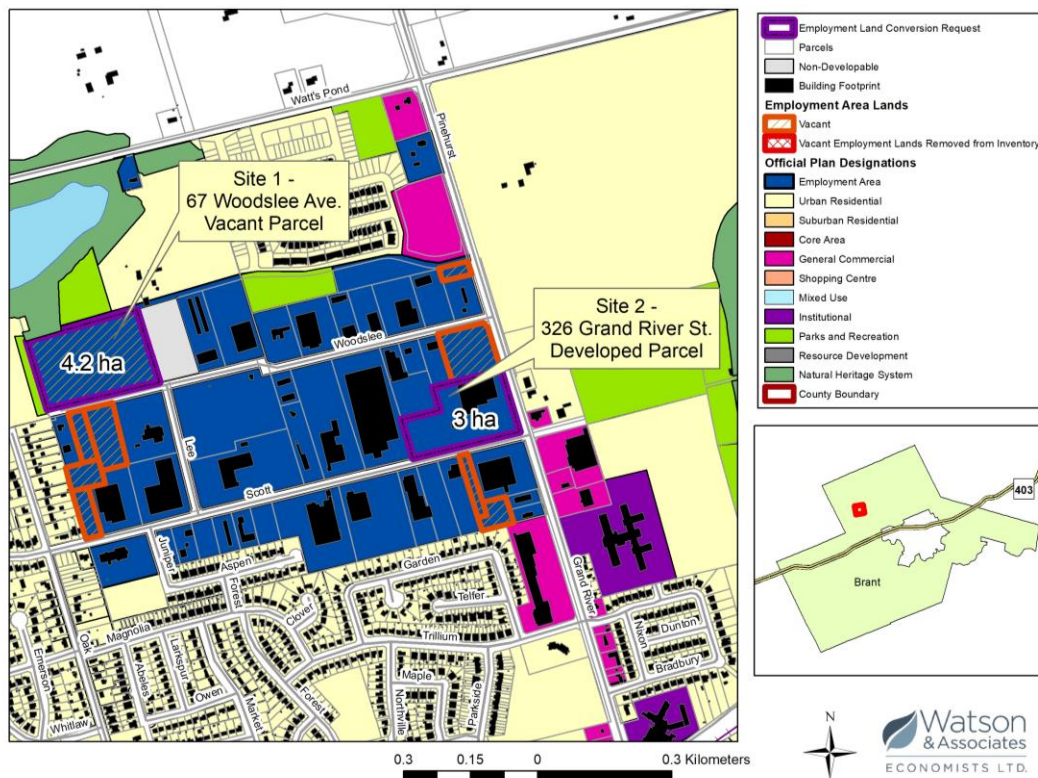
7.4.1 Paris North Employment Area

As identified in Figure 7-2, there are two Employment Area land site conversion requests in the Paris North Employment Area. As discussed in Chapter 6, the Paris North Employment Area is a mature Employment Area with only 10 ha of vacant Employment Area land remaining. The Employment Area accommodates a range of businesses, primarily small and medium-sized businesses. A large parcel at the centre of the Employment Area is a County recreational site with soccer fields (Woodslee Avenue/Lee Road, SE). All occupied and vacant parcels are less than 5 ha in size. The Employment Area is adjacent to a large commercial corridor in Paris (Grand River



St. N.), to the east. Other surrounding uses include residential and parkland. The Employment Area provides the opportunity to accommodate E.L.E. that does not require large sites or prestige industrial location requirements, such as access to highway.

Figure 7-2
County of Brant
Paris North Employment Area
Employment Area Land Conversion Requests



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Site 1 – 67 Woodslee Avenue

These lands are part of the Northwest Paris Area Study which was approved by County Council in 2012; the preferred concept on the lands had a mix of residential, commercial and employment. The lands were recently identified as surplus to the water tower and conveyed to Pinevest Homes (Woodslee) Inc. The lands had been utilized for agricultural purposes for the past several years and there are no structures. Recently they have been utilized for topsoil storage for the Brookfield development located to the



north of the lands. The site is currently vacant and is located adjacent to the County water tower directly to the east. To the south of the site are employment lands, consisting of both occupied and vacant lands. Residential and parkland uses are located to the north and west of the site.

Additional lands owned by the County and adjacent to the water tower were not included in the recent sale. It is acknowledged that affordable housing and the delivery of such housing play prominent roles to ensure that the availability of the opportunity is evaluated in future development applications.

Given the historical context of the above, however, the M.C.R. recommends that the County should retain this site as Employment Area land, as this site is among the largest in the Paris North Employment Area. The Paris North Employment Area has a limited supply of vacant employment land, and this Employment Area is important in contributing towards a range of Employment Area options for the County over the long-term planning horizon.

It is recommended that the site remain as an Employment Area for the following reasons:

- There is no demonstrated need for additional Community Area lands within the County, and the subject lands are required for Employment Area use over the long term;
- The site has market potential for a medium-sized employment use, or could be subdivided to accommodate a number of smaller-scale developments (it is encouraged that the County maintain its supply of serviced or serviceable vacant employment land parcels that are medium to large in size);
- It is located within an established Employment Area (i.e., not located on the fringe, fragmented, or outside an Employment Area). Conversion of the site would potentially undermine the planned function of the area by risking further erosion of the Employment Area through subsequent conversion requests; and
- The conversion to non-employment uses is generally not compatible with the surrounding land uses in the Employment Area, particularly the occupied and vacant Employment Area lands located directly to the south.



Site 2 – 326 Grand River St. N.

The applicant is seeking a conversion of this site to allow for a broader range of commercial uses in order to market the lands to a wider range of users. The site is developed; however, it is underutilized with a large portion of the parcel undeveloped. Current uses include a multi-tenant industrial building with industrial and commercial uses as permitted in the O.P. The site is adjacent to other Employment Area uses to the west and to the south. To the north is an undeveloped vacant parcel currently used for trailer parking. To the southeast is a veterinary clinic and the Sobeys Plaza.

It is recommended that the County retain this site as Employment Area land; however, consideration should be given to broadening the range of land uses permitted on this site to include uses that would allow for additional commercial uses. Notwithstanding, this consideration for a broader range of land uses, it is recommended that sensitive commercial and institutional uses, including major retail and places of worship, not be permitted on this site or within the surrounding area.

The Community Corridor Designation includes areas of the County of Brant that bound neighbourhoods and employment areas, providing a transportation corridor and a mix of amenities to nearby residents and workers. Often located along arterial or collector roads, these corridors connect community nodes and act as a linear focus for mixed-use development, intensification, high standards of urban design, the efficient transportation of goods, and a shared space between automobiles, public transit, and active transportation modes.

7.4.2 Paris Southeast Employment Area

The Paris Southeast Employment Area is a mature Employment Area located along Dundas Street, a major arterial road within the County. The Employment Area is located within 1 km of Highway 403. The Employment Area includes a range of heavy and light industrial uses, including several of the County's largest employers. Heavy industrial uses are located primarily in the northern portion of the Employment Area, north of Dundas Street. A commercial corridor breaks the Employment Area into two areas. The proposed conversion site is situated in the southern portion of the Employment Area, south of Dundas Street. Located directly to the south of the Employment Area, south of the Alexander Graham Bell Parkway (Highway 403) at the Oak Park Road interchange, is the City of Brantford Northwest Industrial Park. The



Paris Southeast Employment Area has approximately 107 ha of vacant employment land. The Employment Area offers an opportunity to accommodate a wide range of industrial uses, including General and Prestige Uses.

Site 3a and 3b – Sharp Road

The applicants of these sites are seeking a conversion on two parcels totalling 16 ha, to accommodate urban residential uses. As identified in Figure 7-3, the large parcel, Site 3b, is proposed to be subdivided and the southern portion is to remain an Employment Area. To the west of the site are undeveloped lands designated Urban Residential which are planned to be a part of a broader residential development that would include the proposed conversion site. To the east and south of the site are vacant Employment Area lands. To the north is the Dundas Street Commercial Corridor.

The applicant had discussed the process associated with the conversion of the lands and the broader development of the area for some time with County staff. The proposed O.P.A. gives consideration to the broader planning area to establish a comprehensive approach to land uses that would generally be similar to considerations in an area study. The lands were previously owned by the County and purchased by Telephone City Aggregates Ltd. (TCA) as they were not determined as a priority for employment lands for the County of Brant. The lands are not located in a high priority area, such as Rest Acres Road and Highway 403, and as a result were sold by the County. On that basis, the applicant is making the request to change the land use for the purposes of future mixed-use development.

The applicant has also been working in corporation with adjacent landowners as it relates to the potential land uses and consideration of a new road network for the area. The new road network proposes a roundabout at Dundas Street/Willow Street/Willis Avenue as a means to improve traffic movement through the area. The purposed road network also provides the opportunity of maintaining Curtis Avenue in its current condition as access for existing homes.

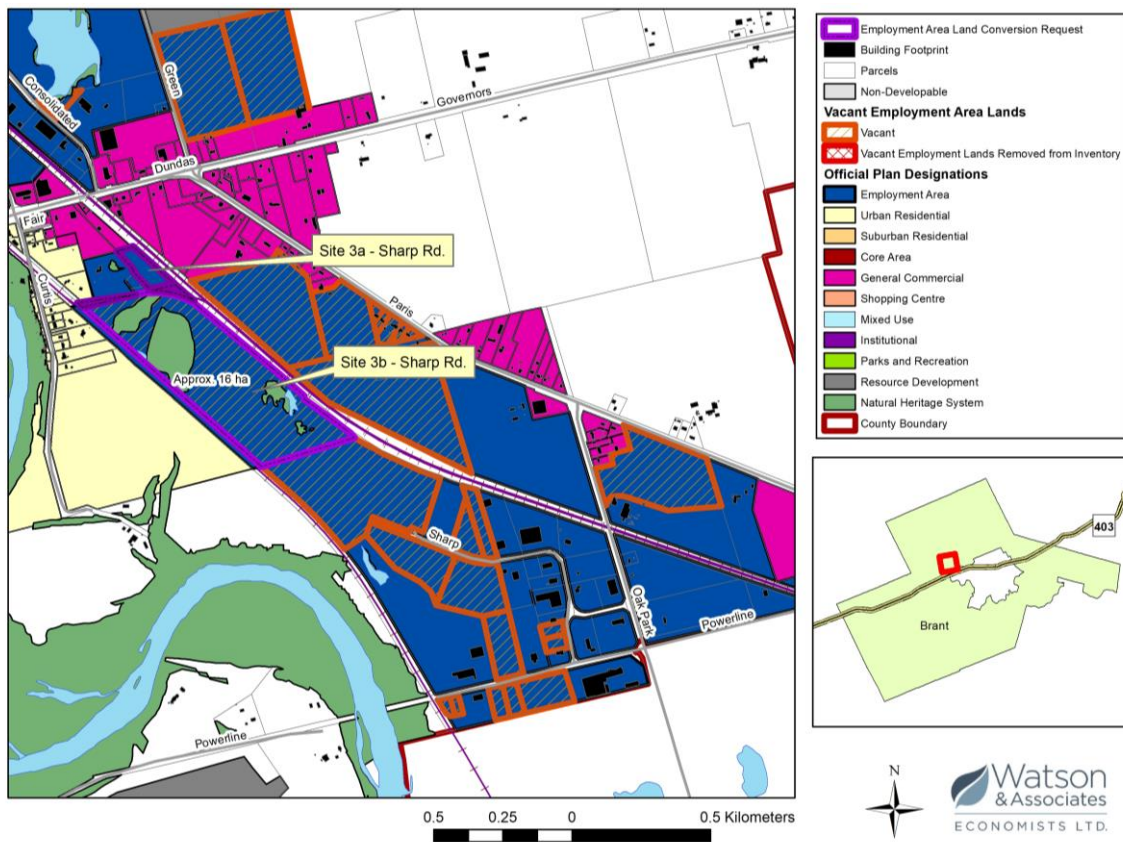
It is recommended that these sites remain as an Employment Area for the following reasons:

- There is no demonstrated need for additional Community Area lands within the County, and the subject lands are required for Employment Area use over the long term;



- The site has market potential to accommodate a large-scale employment use, or could be subdivided to accommodate a number of medium- to small-scale developments (it is encouraged that the County maintain its supply of serviced or serviceable vacant employment land parcels that are medium to large in size);
- It is located within an established Employment Area (i.e., not located on the fringe, fragmented, or outside an Employment Area). Conversion of the site would potentially undermine the planned function of the area by risking further erosion of the Employment Area through subsequent conversion requests; and
- The conversion to non-employment uses is generally not compatible with the surrounding land uses in the Employment Area, particularly the occupied and vacant Employment Area lands located directly to the south.

Figure 7-3
County of Brant
Paris Southeast Employment Area
Employment Area Land Conversion Requests



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



7.4.3 Cainsville Employment Area

The Cainsville Employment Area is a large Employment Area within the Rural System. Cainsville has a very small residential component, primarily a strip of rural residential lots along the Grand River and Blossom Road. The remaining area of Cainsville is primarily comprised of general industrial sites within a low building coverage (i.e., ratio of building space to land area) that provides space for permitted outside storage. Industrial uses primarily include businesses in construction, warehousing/logistics as well as some manufacturing. The Employment Area has existing servicing constraints; however, municipal servicing options for this area are currently under review with the City of Brantford as part of the County's annexation agreement with the City of Brantford. It is noted that this municipal servicing agreement with the City of Brantford does not allow for residential development, as per the Boundary Adjustment Agreement, 2016. This agreement will not be up for consideration to be re-negotiated.

Site 4a and 4b – 95 Old Onondaga Rd./ N. of 366 Count Road 18

As illustrated in Figure 7-4, there are two sites under review, Site 4a and Site 4b. These sites form the southern portion of the Cainsville Employment Area and are undeveloped. The applicant is requesting the conversion of 84 ha of Employment Area lands to Urban Residential use. Based on a review of the site, it is recommended the site remain as Employment Area for the following reasons:

- There is no demonstrated need for additional Community Area lands within the County, and the subject lands are required for Employment Area use over the long term;
- The site represents a significant component of the County's vacant employment land supply. The site has market potential to accommodate a large-scale employment use, or could be subdivided to accommodate a number of medium- to small-scale developments (it is encouraged that the County maintain its supply of serviced or serviceable vacant employment land parcels that are medium to large in size);
- It is located within an established Employment Area (i.e., not located on the fringe, fragmented, or outside an Employment Area). Conversion of the site would potentially undermine the planned function of the existing Employment Area located directly to the north by creating potential land-use incompatibilities



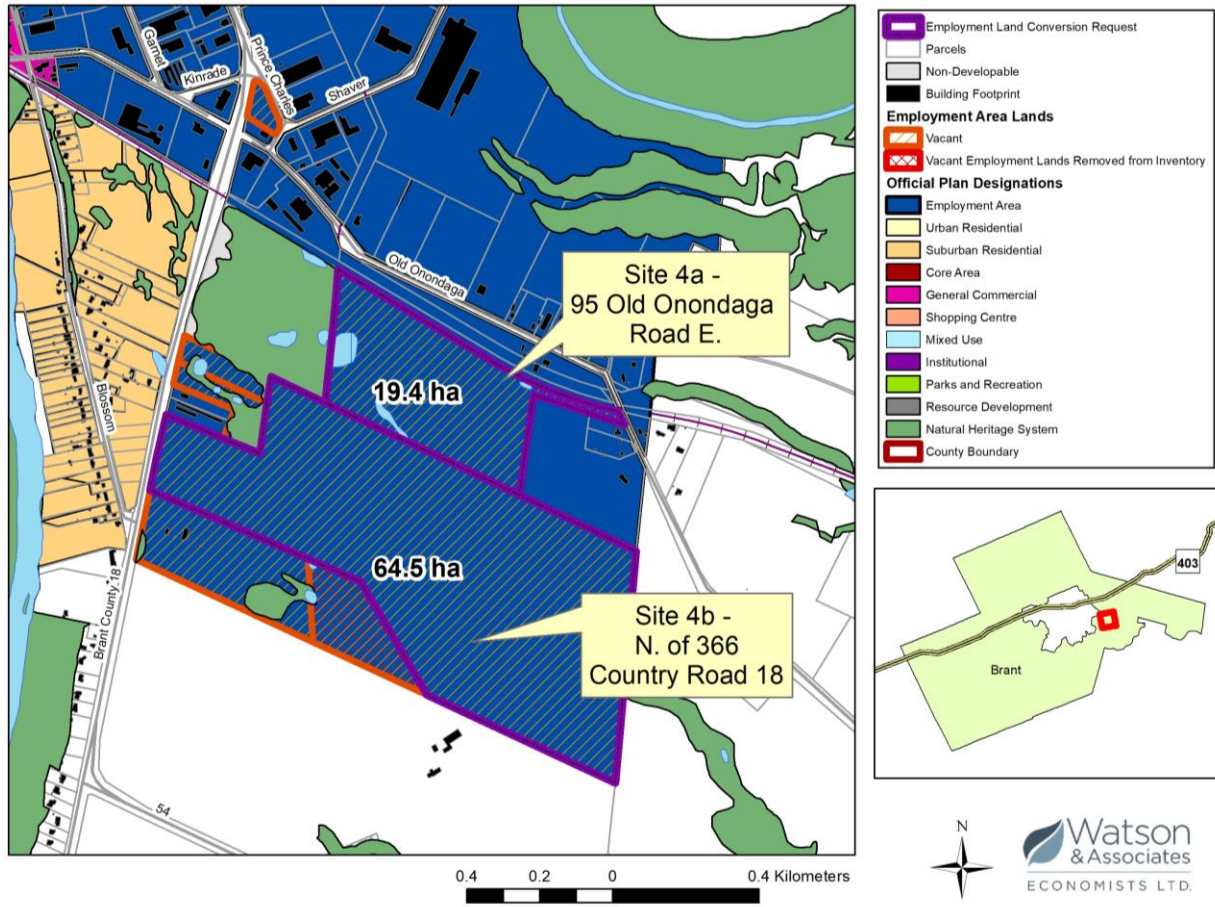
and/or risking further erosion of the Employment Area through subsequent conversion requests;

- The site is located in proximity to major transportation corridors (e.g., arterial roads and highways);
- In accordance with Growth Plan policy 2.2.5.9 (e), there are no existing or planned infrastructure and public service facilities to accommodate the proposed uses (e.g., libraries, schools, retail, and indoor/outdoor recreation); and
- The conversion of this site to Community Area is not supported by the City of Brantford/Brant County Municipal Servicing Agreement.

It is further recommended that the County consider the preparation of a Secondary Plan for this Employment Area to more clearly define the long-term vision for this area and identify potential land uses and target sectors. Such a study would help ensure that this Employment Area is planned to achieve its maximum potential as a fully municipal-serviced Employment Area over the long term.



Figure 7-4
County of Brant
Cainsville Employment Area
Employment Area Land Conversion Requests



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

7.5 Recommendations

It is recommended that all sites requested for conversion remain Employment Areas. A conversion request site evaluation has been completed for each Employment Area and is provided in Appendix K.



Chapter 8

Settlement Boundary Area Expansion Assessment for Employment Areas



8. Settlement Area Boundary Expansion Assessment for Employment Areas

8.1 Introduction

8.1.1 What is a Settlement Area Boundary Expansion (S.A.B.E.)?

A settlement boundary is a delineated area in the County's O.P. for each settlement area. To expand an existing settlement area, an adjustment to the settlement boundary is required. Any adjustments to the settlement boundary need to be updated in the County's O.P. as part of the M.C.R. In accordance with the Growth Plan, 2019, a small settlement area boundary expansion (S.A.B.E.) of 40 hectares or less can occur outside an M.C.R., as previously discussed in Chapter 2. Ultimately, a S.A.B.E. requires the completion of an assessment, including supporting studies, which will be reviewed by the Province as part of the M.C.R.

8.1.2 Policy Context

The Growth Plan, 2019 provides direction for where and when S.A.B.E.s are permitted. This includes policies directing expansions to areas with sufficient planned or existing infrastructure and public service facility capacity to bring lands within the Urban System. S.A.B.E.s should avoid Prime Agricultural Areas and the Natural Heritage System where possible in both the Urban and Rural Systems.

The approach in assessing a S.A.B.E. for the Urban System and Rural System differs. Generally, the Growth Plan, 2019 requires only minor S.A.B.E. requests within the Rural System which includes rounding out existing residential developments and expansions for Rural Employment Area for existing businesses. Within the Urban System, the Growth Plan, 2019 requires a S.A.B.E. be based on a detailed assessment once it has been established that there is a need such an expansion.¹ According to the P.P.S., 2020, the level of detail of the S.A.B.E. assessment should correspond with the

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.8 and Policy 2.2.9, pp. 25 to 27.



complexity and scale of the S.A.B.E. or development proposal.¹ Further details on the policy requirements for Urban and Rural S.A.B.E.s are provided below.

8.1.2.1 Urban S.A.B.E.

According to the Growth Plan, 2019, a S.A.B.E. for additional lands within the Urban System needs to be justified through an L.N.A. Once a need has been established, the S.A.B.E. is then reviewed based on the feasibility of the proposed expansion, and the most appropriate location for the proposed expansion will be identified based on the comprehensive application of the policies of the Growth Plan, including the following:

- Sufficient opportunities to accommodate growth are provided (i.e., land configuration supports an optimal net developable area and ratio);
- Adjacent land uses are compatible;
- Infrastructure in the area is available, planned or can be provided;
- Expansion near key hydrologic areas and environmental features is avoided where possible;
- Agriculture assessment if on prime agriculture lands is conducted; and
- There is compliance with minimum distance separation (M.D.S.) formulae if in proximity to agriculture operations.²

8.1.2.2 Rural S.A.B.E.

Rural S.A.B.E. requirements for residential lands are limited to minor rounding of existing residential development and hamlet boundaries. An adjustment to the boundary of hamlets for residential development requires a site-specific review based on planning rationale. Similar to the urban S.A.B.E., a rural S.A.B.E. also requires an agricultural assessment if on prime agriculture lands and compliance with M.D.S. formulae if in proximity to agriculture operations.

According to the Growth Plan, 2019, expansions to existing Rural Employment Areas may be permitted only if necessary to support the immediate needs of existing businesses and if compatible with the surrounding uses.³ S.A.B.E. requests for Rural

¹ Provincial Policy Statement, 2020, Policy 1.1.3.8, p. 10.

² A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9.3, p. 25.

³ Ibid., Policy 2.2.9., pp. 27 and 28.



Employment Areas are generally only permitted for existing Rural Employment Areas and for existing businesses. Development in the Rural Area is permitted for:

- Management or use of resources;
- Resource-based recreational uses; and
- Other land uses that are compatible with the rural landscape and are not appropriate for the urban settlement area.¹

8.1.3 County S.A.B.E. Requests Received

The County received many S.A.B.E. requests from landowners to accommodate additional Urban Employment Area, Rural Employment Area, Urban Community Area (residential lands) and Secondary Settlement Areas and Hamlets, for both residential and employment lands to be added to the settlement areas.

Based on the results of the L.N.A., the County does not require additional lands to accommodate Urban Community Area growth (for residential and population-related employment). Accordingly, no S.A.B.E. for Community Area lands will be considered as part of this M.C.R. As previously noted, however, a need for approximately 105 ha of Urban Employment Area lands by 2051 has been identified. As a result, it is recommended that the County explore options to expand its designated Urban Employment Area land supply. Urban S.A.B.E. to accommodate an Urban Employment Area will be evaluated based on criteria and matrix in accordance with the provincial policy framework.

S.A.B.E. requests are summarized below based on the Urban System and the Rural System.

Urban System

Urban Employment Area S.A.B.E. requests:

- Paris South Employment Area (13) – see Figure 8-2

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9., pp. 27 and 28.



Urban Community Area (residential) S.A.B.E. requests:

- Paris East (1) – 750 Governors Road East
- Paris Sharp Road (2) – 18.2 ha TCA lands outside the Paris Settlement Area Boundary, south of Sharp Road

Rural System – Secondary Settlement Areas and Rural Lands

Secondary Settlement Area/Rural Employment Area S.A.B.E. requests:

- Cainsville Employment Area (2) – Papple Road (93 ha); 112-114 Old Onondaga Road (42 ha + 26 ha)
- New Durham Employment Area (1)
- Airport/Oakhill Employment Area (1) – conversion to residential
- Burford (1) – north side Eighth Concession Road/Bishopsgate Road

Secondary Settlement Areas and Hamlets Residential S.A.B.E. requests:

- Oakhill/Airport Settlement Area (3) – 243; 245; and 299-301 Oakhill Drive
- Mount Pleasant (2)
- Hamlets - Cathcart (1), Onondaga (1)

S.A.B.E. requests within the Rural System have been reviewed by County staff in accordance with the provincial policy framework of the P.P.S., 2020, the Growth Plan, 2019, and based on the justification that constitutes good land-use planning, meeting the intent and tests of the *Planning Act*. The review is also based on the Municipal Comprehensive Review and Residential and Employment Land Needs Assessment, along with the Preliminary Policy Directions presented to Council on June 10, 2021 regarding S.A.B.E.s. The allocation of growth (residential) regarding the Primary Settlement Areas and Secondary Settlement Areas indicated that the majority of residential growth will be in the County's Strategic Growth Areas of Paris and St. George, with full municipal services; supporting the Growth Plan, 2019 and the P.P.S., 2020. In addition, several of the S.A.B.E. requests for rural employment lands did not constitute or justify an overall need for additional rural employment lands nor the expansion of an existing business. Specifically in Cainsville, the Brant-Brantford Boundary Adjustment Agreement states that full municipal services will only be available within the current settlement area boundary of Cainsville, for only industrial,



commercial and institutional (IC&I) lands; and this Boundary Adjustment Agreement will not be re-negotiated.

Most of the S.A.B.E. requests outside the Strategic Growth Areas did not constitute minor rounding out of Secondary Settlement Areas, where only partial or no servicing is available. In addition to the County's infrastructure, the impacts to the protection resources indicate that the proposals received are not supportable for further review.

8.2 S.A.B.E. Review Approach

S.A.B.E. requests adjacent to the Paris 403 Business Park were selected as the focus area for review since these sites are in proximity to an Employment Area with the greatest demand for Employment Area growth. The Paris 403 Business Park has been identified by the County of Brant as a potential P.S.E.Z., an area identified for long-term protection related to job creation and economic development. A request for the P.S.E.Z. has been submitted to the Province for the creation of a P.S.E.Z. within the Paris 403 Business Park. The Paris 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

The S.A.B.E. requests in the Paris 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes which will be submitted to and examined by Province for review and approval:

- Municipal Servicing (water/wastewater and transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction Impacts;
- Land-Use Planning; and
- Market Analysis.

Figure 8-1 provides the S.A.B.E. evaluation criteria summary and is based on the above six themes which have been organized to address the policy requirements of the Growth Plan, 2019 and the P.P.S., 2020, as well as local criteria. It is important to note that the evaluation criteria have been summarized based on background work completed. The matrix includes 21 local and provincial criteria for a S.A.B.E. assessment within an evaluation spectrum that assess the site based on how well the



S.A.B.E. site addresses the criteria. The evaluation spectrum ranges from favourable in dark green to less favourable in orange. It is important to note that the evaluation matrix does not use a quantitative scoring and/or weighting system. The purpose of the matrix is to review each site based on a comprehensive criterion and identify potential opportunities and challenges for each site.

A completed matrix has been prepared for each of the nine S.A.B.E.s in the Focus Area and is provided in Appendix L. Key highlights of the results of the assessment are discuss herein. S.A.B.E. requests within the Rural System are discussed later in this chapter in accordance with the provincial policy framework.



Figure 8-1a
County of Brant
Settlement Area Boundary Expansion (S.A.B.E.) Criteria Matrix

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/wastewater and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?	Available	Highly Feasible	Feasible	Low Feasibility	Growth Plan, 2019 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019 - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available	Highly Feasible	Feasible	Low Feasibility	P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019 - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019 - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS	Less than 10%	10% to 25%	Greater than 25%	Growth Plan 2019 - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No	Within 1 km	Adjacent to Site	On Site	Growth Plan, 2019 - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No	Adjacent to site buffered	Adjacent to site not buffered	On Site	Growth Plan, 2019 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Figure 8-1b
County of Brant
Settlement Area Boundary Expansion (S.A.B.E.) Criteria Matrix

Topic Area	Criteria	Evaluation		Provincial Policy Relationship	Topic Area	Criteria
Agriculture & Agri-Food Network	As defined by the P.P.S., 2020, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7		Actively used for agriculture, Class 4 to 7	Class 1 to 3	P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture	Low level of agriculture activity (mixed: crops/ & or livestock)	Moderate level of agriculture activity (crops)	High level of agriculture activity (crops)	Growth Plan, 2019 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to the surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Local Criteria
	Any impact on Minimum Distance Separation (M.D.S.) requirements?	Outside any Setback	Minimal Impact	Moderate Impact	High Impact	Growth Plan, 2019, 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Figure 8-1c
County of Brant
Settlement Area Boundary Expansion (S.A.B.E.) Criteria Matrix

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints at the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No	Low	Moderate	High	Local Criteria
	Is the expansion area located in an area with potential high demand for employment growth?	Yes		No		Local Criteria
	Does the site area offer the opportunity to expand the existing Employment Area (critical mass)?	Adjacent	Separated by Arterial	Separated by Highway	Separated by Other Uses	Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity	Good Opportunity	Moderate Opportunity	Low Opportunity	Local Criteria
	Does the site offer good connectivity and exposure to major transportation corridors, including a provincial highway?	Direct Access	Within 1 km via Arterial	Beyond 1 km via Arterial	Not on Major Arterial and 1 km+ from Highway	Growth Plan, 2019 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing the site area as Employment Area on nearby or adjacent uses?	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019, 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Local Criteria
	Does the site offer a good transition from new to existing development?	Highest Opportunity	Good Opportunity	Moderate Opportunity	Low Opportunity	Growth Plan, 2019 - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8

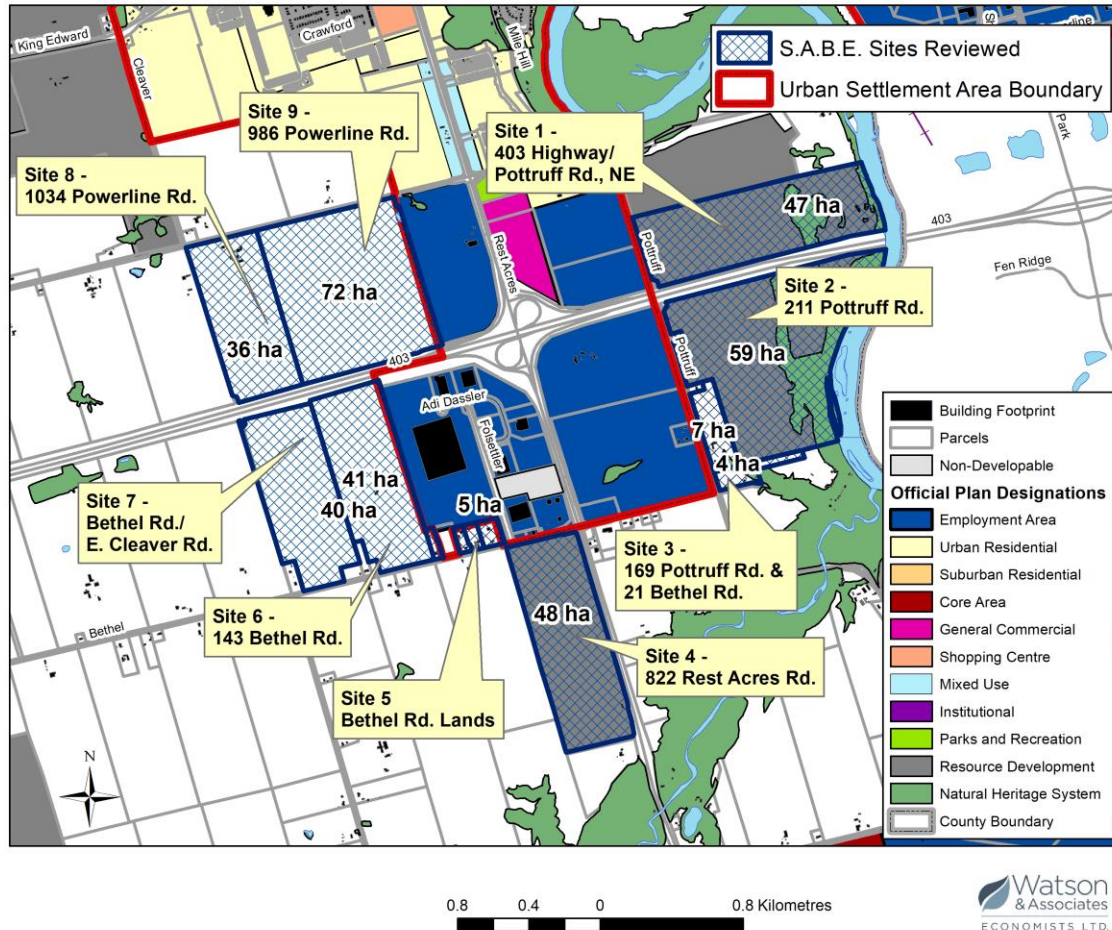


8.3 S.A.B.E. Employment Areas Sites Assessed

8.3.1 S.A.B.E. Locations

Figure 8-2 provides a map of the nine S.A.B.E. Urban Employment Area requests in the Paris 403 Business Park including size of site (net of environmental features). Overall, the nine packaged requests total approximately 345 gross ha (net of natural heritage features and constraint lands).

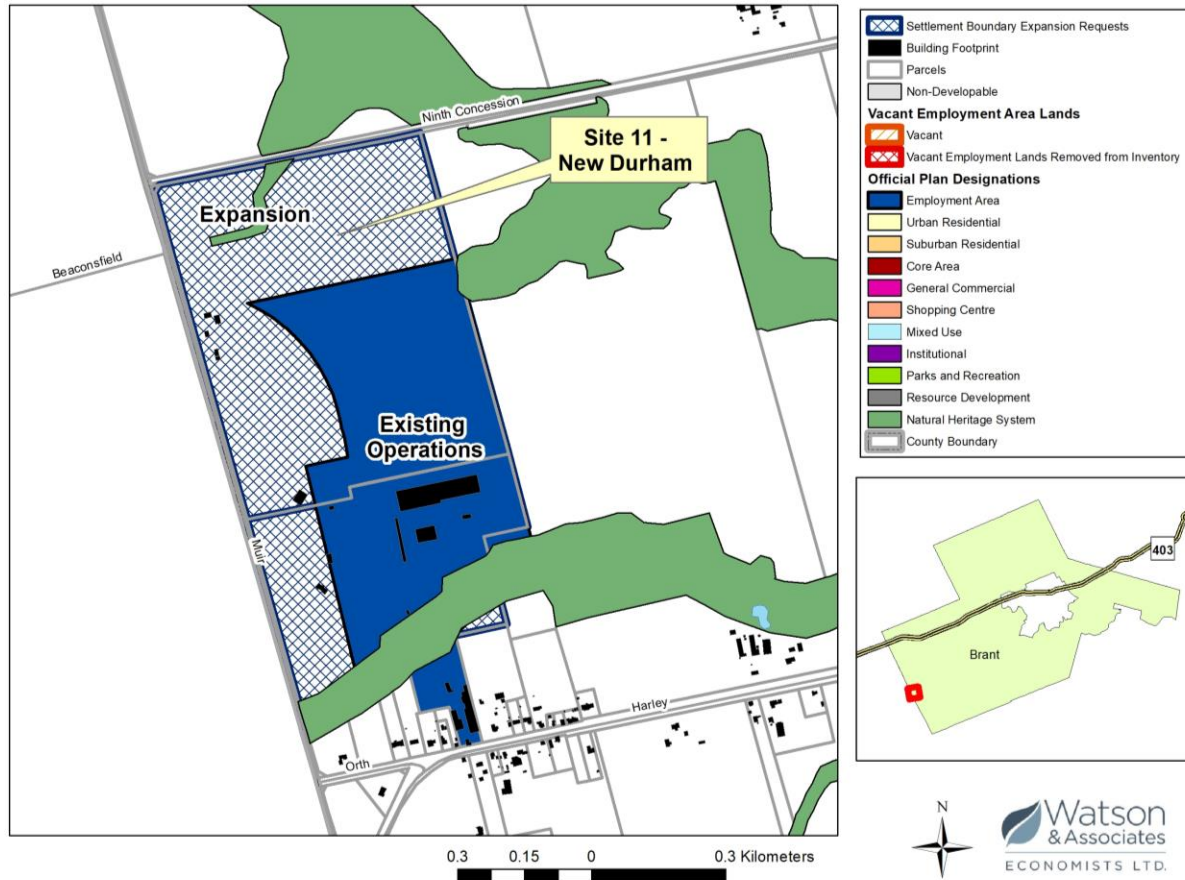
Figure 8-2
County of Brant
S.A.B.E. Urban Employment Area Sites Reviewed



Note: Figure includes current County of Brant O.P. (2012) Designations.



Figure 8-3
County of Brant
S.A.B.E. Rural Employment Area Reviewed



Note: Figure includes current County of Brant O.P. (2012) Designations.

8.3.2 S.A.B.E. Site Descriptions

Site 1 - 403 Highway and Pottruff Road Rd. (northwest quadrant of highway interchange)

- S.A.B.E. Site 1 is situated on lands currently designated in the County's O.P. as Resource Development, east of Pottruff Road and north of Highway 403.
- Site 1 is approximately 47 ha net of environmental features.
- Pottruff Road separates the S.A.B.E. from Employment Area lands to the west which are currently vacant. To the north and east of the site is the Grand River. There is also a tract of agriculture land to the northeast. To the south are



additional lands designated as Resource Development which are also a S.A.B.E. site (Site 2).

- Site 1 as Resource Development has approximately a 15-year lifespan remaining on resource extraction capability.
- The following are some considerations:
 - Lifespan of the land as an aggregate operation; Growth Plan, 2019 Policy 4.2.8 requires municipalities to conserve aggregate resources;
 - Impact on environmental features, including the Grand River; and
 - Potential fragmented agriculture lands to the northeast.

Site 2 – 211 Pottruff Road (southeast quadrant of highway interchange)

- S.A.B.E. Site 2 is situated on lands currently designated in the County's O.P. as Resource Development, east of Pottruff Road and south of Highway 403.
- Site 2 is approximately 59 ha net of environmental features.
- Pottruff Road separates the S.A.B.E. from Employment Area lands to the west which are currently vacant. There is also a small tract of designated agriculture to the west. To the east of the site is the Grand River. To the north are additional lands designated as Resource Development which are also a S.A.B.E. site (Site 1). To the south includes designated agriculture lands.
- Site 2 as Resource Development has approximately a 10-year lifespan remaining on resource extraction capability.
- The following are some considerations:
 - Lifespan of the land as an aggregate operation; Growth Plan, 2019 Policy 4.2.8 requires municipalities to conserve aggregate resources;
 - Impact on environmental features, including the Grand River; and
 - Impact on the small tract of designated agriculture lands between Site 2 and the existing Employment Area.

Site 3 – 169 Pottruff Road and 21 Bethel Road (south of the existing Employment Area)

- S.A.B.E. Site 3 is situated on lands currently designated in the County's O.P. as Agriculture, east of Pottruff Road and south of Highway 403.
- The sites are privately owned; the owners live at both addresses.
- The sites are surrounded by employment/industrial lands and owners would like to transition the properties to allow, as an example, M1 and M2 zoning to permit family businesses or other options.



- Site 3 consists of two narrow parcels of approximately 11 ha net of environmental features and are between designated Employment Area lands to the west and Resource Development lands (also reviewed as S.A.B.E. Site 2) to the east.

Site 4 – 822 Rest Acres Road (southeast quadrant of highway interchange)

- S.A.B.E. Site 4 is situated on lands currently designated in the County's O.P. as Resource Development, east of Rest Acres Road and south of Highway 403.
- Site 4 is approximately 48 ha net of environmental features.
- Site is surrounded by designated agriculture land to the east, west and south. To the north are designated occupied/developed Employment Area lands.
- Site 4 could be considered as future employment lands after a 25-year+ resource extraction.
- The following are some considerations:
 - Lifespan of the land as an aggregate operation; Growth Plan, 2019 Policy 4.2.8 requires municipalities to conserve aggregate resources; and
 - Containment of urban growth since surrounded by rural lands.

Site 5 – Bethel Rd. Lands (multiple sites, adjacent to existing Employment Area)

- S.A.B.E. Site 5 is situated on lands currently designated in the County's O.P. as Agriculture and the lands are adjacent to occupied and developed Employment Areas to the north and east. To the south of the multiple sites are designated agriculture lands.
- The four sites are small and total 5 ha; the S.A.B.E. would involve a minor rounding out of the existing Employment Area and provide a more logical southern delineation of the Employment Area.

Site 6 – 143 Bethel Rd. (southwest quadrant of highway interchange)

- S.A.B.E. Site 6 is situated on lands currently designated in the County's O.P. as Agriculture and is adjacent to occupied and developed Employment Areas to the east. The site is surrounded by additional S.A.B.E. sites to the west (Site 7) and to the north (Site 9). To the south is designated Agriculture land.
- Site 6 is approximately 41 hectares.



Site 7 – Bethel Rd./Cleaver Rd. (southeast quadrant of highway interchange)

- S.A.B.E. Site 7 is situated on lands currently designated in the County's O.P. as Agriculture and is surrounded by additional S.A.B.E. sites to the east (Site 6) and to the north (Site 8), although to the north is Highway 403. To the west and south is designated Agriculture land.
- Site 7 is approximately 40 hectares.
- Site 7 would require that Site 6 be brought into the Urban System; otherwise, Site 7 would not form as part of contiguous Employment Area.

Site 8 – 986 Powerline Road (northwest quadrant of highway interchange)

- Site 8 is approximately 36 ha on lands designated Agriculture. To the north and west of the site are Agriculture lands. Another S.A.B.E. request is to the east (Site 9) and to the south is Highway 403 with another S.A.B.E. site to the south (Site 7).
- To the northeast is an aggregate operation.
- Site 8 would require that Site 9 be brought into the Urban System; otherwise, Site 8 would not form as part of contiguous Employment Area.

Site 9 – 1034 Powerline Road (northwest quadrant of highway interchange)

- S.A.B.E. Site 9 is the largest S.A.B.E. site at 72 ha. The site is adjacent to the vacant designated Employment Area lands to the east. To the north are agriculture lands that are between Site 9 and the existing urban area. S.A.B.E. Site 9 is situated on lands currently designated in the County's O.P. as Agriculture. To the west of the site is another S.A.B.E. Site (Site 8) and to the south (Site 7), although to the south is Highway 403.
- The following are some considerations:
 - Designated agriculture lands to the north that may become fragment since surrounded by urban uses on three sides; and
 - Containment of urban growth since surrounded by rural lands.

Site 11 – New Durham

- Site 11 (New Durham) involves the expansion of the existing operation, requiring 23 ha of land. The expansion would allow a larger employer to expand its



existing operations, which is a large successful business and employer that has created many jobs in the rural area.

- Based on the Growth Plan, 2019, the request meets the S.A.B.E. requirements for rural S.A.B.E.
- The evaluation was contingent on an Agricultural Impact Assessment (A.I.A.) and M.D.S. requirements, which were submitted with the application and were successful with minimal impacts to the agricultural system, as per the County's A.I.A. evaluation.

8.4 S.A.B.E. Employment Area Assessment

The following section summarizes the results of the S.A.B.E. preliminary analysis and results. As previously discussed, an evaluation matrix and background work have been completed as part of the S.A.B.E. assessment. The main purpose of this section is to summarize the findings of the County's technical analysis and technical studies submitted, to assess the most appropriate locations for new employment lands.

This report also provides the S.A.B.E. concept maps which presents the general layout of the preferred S.A.B.E. areas based on the technical review results. The concept map will be subject to more detailed analysis of water, wastewater and transportation infrastructure needs, and A.I.A. and M.D.S. calculations.

The results of the S.A.B.E. review consist of a draft S.A.B.E. area, which will be submitted to the Province for review, along with the new O.P.

The completed evaluation matrix and select background work are provided in Appendix L.

8.4.1.1 *Municipal Servicing (Water/Wastewater and Transportation)*

The County undertook a review to establish infrastructure planning principles, timing and growth allocation, phasing of water/wastewater availability and relevant Master Servicing Plans used to evaluate the S.A.B.E. requests. The review included a high-level assessment of available servicing capacity and infrastructure cost impacts.

Transportation planning principles were established through a policy review and discussions regarding the County's Transportation Master Plan which is underway. Transportation implications of accommodating forecast additional growth included



advantages and disadvantages of the S.A.B.E. locations for additional employment lands from a transportation perspective.

Section 2.2.8 of the Growth Plan, 2019 requires that there be sufficient capacity in existing and planned infrastructure, including transit and transportation corridors and facilities, to service new or expanded settlement areas. The Growth Plan, 2019 requires that transportation infrastructure related to the movement of people and goods is an important investment to be considered as part of the land-use planning process.

The municipal servicing component of the review of the sites assessed the following criteria:

- Optimize the use of existing infrastructure where possible, with consideration to available and reserve capacity in the water and wastewater system.
- Utilize infrastructure where future planned growth is located.
- How easily can a water/wastewater servicing and connection be made available to the lands?
- Provide the reliability and security in the long-term distribution of drinking water and collection of wastewater.
- When extending services, what is the level of impact on the natural environment, including key hydrologic features and areas?
- How feasible is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?
- Can sustainable modes of transportation and the impact of transportation networks on the natural environment be addressed?

Key highlights of the assessment included the following:

- Water and wastewater servicing requirements and timing for each parcel were assessed. The northwest quadrant of the Highway 403/Rest Acres Road area was better positioned for immediate future servicing (Sites 8 and 9). The southeast quadrant (Sites 2 and 3) was less preferred based on servicing requirements, but long-range the servicing would be more favourable (15 years+). The southwest quadrant (Sites 6 and 7), west of Bethel Well are better positioned for future servicing, but have additional details and require a Phase 2 Detailed Assessment of infrastructure associated with the S.A.B.E. and the impacts to key hydrologic features of the Bethel Wellhead Protection Area.



- Transportation review included sustainable modes of transportation, vehicle traffic and road network connectivity. The goods flow movement is categorized as an economic transportation principle. The preliminary assessment gave relative merit for expansion options in the Highway 403/Rest Acres Road corridor for additional prestige employment lands meeting these criteria.
- For Climate Change and sustainable modes of transportation, the location of the Highway 403/Rest Acres Road corridor provides facilitated access to employment lands with less distance travelled through urban areas of Paris.

Overall, from a municipal servicing perspective the following sites rank the most favourable:

- Sites in the northwest quadrant, Sites 8 and 9 (totalling 108 ha).

Further, from a municipal servicing perspective the following sites provide opportunity, but require a detailed assessment of infrastructure associated with the S.A.B.E. and impact of the Bethel Wellhead Protection Area:

- Sites in the southwest quadrant, Sites 6 and 7 (totalling 80 ha).

The following sites are less preferred from a municipal servicing perspective within the short and medium term (within 15 years), but provide opportunity in the long term:

- Sites in the southeast quadrant, Sites 2 and 3 (totalling 70 ha).

8.4.1.2 Environmental Protection and Protection of Resources

Section 4.2.1 of the Growth Plan, 2019 requires that watershed planning be undertaken and water resource systems identified. Moreover, watershed planning or the equivalent will inform decisions on allocation of growth. The environmental protection and protection of resources component of the review of the sites assessed the following criteria:

- What is the impact on the watershed if developed as urban?
- How fragmented is the site area when planning to protect the Natural Heritage System? (recognizing the importance to preserve linkages between natural features)
- How much of the site area includes Natural Heritage Systems lands?



- What is the impact on Climate Change, Energy and Emissions Reductions?
- Does the site area contain known mineral resources (aggregates) or are there mineral resources or active aggregate operations in proximity to the site (adjacent to site, within 1 km)?
- Consider the natural, built, cultural environment and heritage of the community.
- Determine the archaeological potential of the sites for S.A.B.E. and any previous cultural heritage sites.
- Take into consideration any issues and concerns from our Indigenous partners and neighbours with any S.A.B.E. request, and impact to Treaty Lands.
- Any cultural or heritage features, landscapes, buildings on site or adjacent to the site?

Key highlights of the assessment included the following:

- Contiguous expansion of existing settlement area and employment lands in Paris.
- Proximity to existing or planned transportation infrastructure.
- Avoidance of natural areas and constraint lands.
- Connection with planned infrastructure for water and wastewater over the long term.
- Any mineral resource extraction sites (Sites 1, 2 and 4) will not be ready for employment land re-designation until the life expectancy of these sites is exhausted.

Overall, from the environmental protection and protection of resources perspective the following sites are considered favourable:

- Sites in the northwest quadrant, Sites 8 and 9 (totalling 108 ha)
- Sites in the southeast quadrant, Site 5 (totalling 5 ha).

Additionally, the following sites are within the Bethel Wellhead Protection Area and require further study:

- Sites in the southwest quadrant, Sites 6 and 7 (totalling 81 ha).



In addition, the following sites have aggregate operations and would not be ready for employment land re-designation until the life expectancy of these sites is exhausted.

- Sites 1 (northeast quadrant), 2 (southeast quadrant) and 4 (south of Employment Area) (totalling 154 ha).

8.4.1.3 Agriculture & Agri-Food Network

The County undertook an A.I.A. along with M.D.S. calculations, which is required by provincial and municipal policy to provide specific recommendations for the S.A.B.E. that will minimize impact on the County's agricultural system. The assessment is intended to minimize the impacts on the Agricultural System and also ensure compliance with M.D.S. formulae associated with certain farm operations.

The agriculture and agri-food network component of the review of the sites assessed the following criteria:

- As defined by the P.P.S., 2020, what is the agriculture soil class of the lands?
- What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)
- Would the urbanization of the site area introduce/increase traffic flow to the surrounding area?
- Identification of properties subject to Minimum Distance Separation (M.D.S.) formulae.
- Are there any areas with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)

Overall, a S.A.B.E. on all the sites reviewed would have a low impact on the agriculture and agri-food network in the County. The agriculture soil type for all sites is Class 4 to 7. None of the sites have specialty crops (e.g., fruit harvesting). Two of the sites have some agricultural activity; however, the agriculture activity is considered low with a mix of crops and livestock. Some of the sites would require an M.D.S. assessment; however, it is estimated that the impact would be low.

Key findings on the agriculture and agri-food network are provided below.



Very low impact on Agriculture and Agri-Food Network:

- Site 1 (northwest quadrant) – Not actively used for agriculture; Class 4 to 7; and negligible impact on surrounding agriculture operations.
- Site 2 (southeast quadrant) – Not actively used for agriculture; Class 4 to 7; and negligible impact on surrounding agriculture operations.
- Site 3 (southeast quadrant) – Not actively used for agriculture; Class 4 to 7; and negligible impact on surrounding agriculture operations.
- Site 5 (southwest quadrant) – Not actively used for agriculture; Class 4 to 7; negligible impact on surrounding agriculture operations; site area already includes a developed industrial use; and small site (5 ha).

Low impact on Agriculture and Agri-Food Network:

- Site 4 (south of existing Employment Area) – Not actively used for agriculture; Class 4 to 7; minimal impact on surrounding agriculture operations; and M.D.S. minimal impact.
- Site 6 (southwest quadrant) – Low level of agriculture activity (mixed: crops and/or livestock); Class 4 to 7; and minimal impact on surrounding agriculture operations.
- Site 7 (southwest quadrant) – Low level of agriculture activity (mixed: crops and/or livestock); Class 4 to 7; and minimal impact on surrounding agriculture operations.
- Site 8 (northwest quadrant) – Not actively used for agriculture; Class 4 to 7; minimal impact on surrounding agriculture operations; and M.D.S. minimal impact.
- Site 9 (northwest quadrant) – Not actively used for agriculture; Class 4 to 7; minimal impact on surrounding agriculture operations; and M.D.S. minimal impact.

Further details on the impact on the agriculture and agri-food network would be provided in a separate document once candidate sites are selected.

8.4.1.4 Market Analysis

As previously discussed, the Paris 403 Business Park has been selected as the focus area for an Urban Employment Area S.A.B.E. due to anticipated market demand for



Employment Area development. Each of the nine sites has been further reviewed based on their market potential and ability to add to the competitiveness of the County's Employment Area land supply. A market analysis of each site has been conducted based on the following criteria:

- Are there constraints at the site area that would negatively impact the feasibility of the development of the site (e.g., contaminated lands and topography)?
- Is the expansion area located in an area with potential high demand for employment growth?
- Does the site area offer the opportunity to expand the existing Employment Area (critical mass)?
- Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?
- Does the site offer good connectivity and exposure to major transportation corridors, including a provincial highway?

Key highlights of the assessment included the following:

- Since Sites 1, 2 and 4 have operated as aggregate operations, they will require site remediation to transition to Employment Area use which may delay the timing of the lands for development and it may pose challenges in providing an optimal building site area. Sites 1 and 2 also have significant environmental features and are adjacent to the Grand River. When compared to the other candidate sites, Sites 1 and 2 potentially provide a less favourable site configuration for Employment Area development and land utilization.
- Site 5 totals 5 ha and from a market perspective does not provide a significant benefit in supporting long-term employment planning. It is recognized, however, that from a planning perspective these sites have merit in bringing them into the Urban System as they enhance the configuration of the Employment Area by providing a discernible boundary to the Paris 403 Business Park.
- Sites 6, 7, 8 and 9 are generally large flat parcels with no major environmental features (Natural Heritage Systems).
- All sites are within 1 km of the Highway 403 interchange. Road improvements to facilitate the traffic to and from these sites will need to be considered.



Overall, from a market analysis perspective the following sites rank the most favourable:

- Sites 6, 7 (southwest quadrant), 8 and 9 (northwest quadrant) (totalling 189 ha).

8.4.1.5 Growth Management/Land-Use Planning

Each of the candidate sites has been reviewed based on its ability to contain urban growth, compatibility with surrounding land uses and general planning principles outlined in the Growth Plan, 2019 and the P.P.S., 2020, related to Employment Areas.

A review of each site has been conducted within the context of growth management and land-use planning principles based on the following criteria:

- What are the impacts of developing the site area as an Employment Area on nearby or adjacent uses?
- How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)
- Does the site offer a good transition from new to existing development?

Key highlights of this assessment included the following:

- Sites 7 and 8 cannot be brought into the Urban System independently since these sites are not adjacent to the existing Employment Area. These sites are dependent lands to the east being brought into the Urban System.
- Site 9, while adjacent to an existing Employment Area to the east, may lead to the fragmentation of designated agriculture land to the north, which is surrounded by the urban area on three sides.
- Sites 6 and 7 are adjacent to the existing Employment Area and would not lead to the fragmentation of surrounding agricultural lands.
- Site 4 would lead to an irregular Employment Area boundary, extending much further south than the rest of the Employment Area. As such, expanding into this site would not provide a discernable edge to the southern boundary of the Employment Area, which may lead to land-use conflicts with the surrounding agricultural area.
- Sites 1, 2 and 4 are designated as Resource Development and are active operations. The depletion of the County’s aggregate lands would not support



Growth Plan, 2019 Policy 4.2.8 which requires municipalities conserve aggregate resources.

- Site 5 would provide for a logical Employment Area, although the land area would not provide a significant contribution in reducing the County's deficit of Urban Employment Area lands.

Overall, from a growth management and land-use planning perspective the following sites rank most favourable:

- Sites 6 (southwest quadrant), 7 (southwest quadrant), 8 (northwest quadrant) and 9 (northwest quadrant) (totalling 189 ha).

In addition, the following smaller sites should be considered for urban expansion:

- Site 5 (totalling 5 ha).

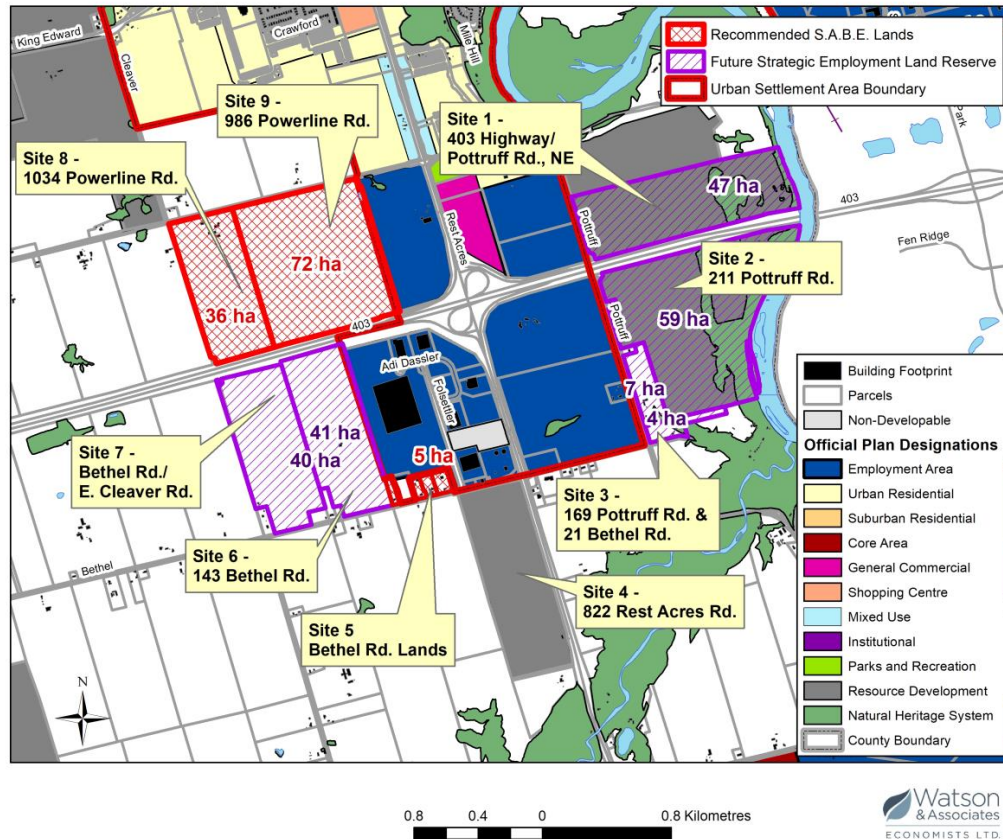
8.5 S.A.B.E. Employment Area Recommendations

Based on the S.A.B.E. Employment Area assessment, it is recommended that Sites 8 and 9 as identified in Figure 8-4 be brought into the urban boundary to accommodate Employment Area land S.A.B.E, totalling 108 ha. These sites rank favourable based on all the S.A.B.E. criteria themes discussed. The sites are a favourable from a market and growth management perspective, as well as the most feasible for municipal servicing and have the least impact on the environment/resources and the agriculture base of the County. In addition, it is recommended that Site 5, a site area with multiple small parcels totalling 5 ha, be brought into the Paris settlement area designated as Employment. These sites are not anticipated to contribute significant employment; however, they would provide a more discernible southern edge of the Employment Area. It should be noted that some of the parcels are already developed.

Furthermore, it is recommended that the County identify possible lands for potential S.A.B.E. As part of the S.A.B.E. analysis, the County identified Future Strategic Employment Reserve lands (approximately 198 ha) which are identified for future S.A.B.E. if demand warrants over the 2051 horizon. Sites recommended for S.A.B.E. and as Future Strategic Employment Reserve lands are areas to be reviewed if demand warrants over the planning horizon.



Figure 8-4
County of Brant
S.A.B.E. Urban Employment Area Recommendation



Note: Figure includes current County of Brant O.P. (2012) Designations.

8.6 Rural Employment Area S.A.B.E.

8.6.1 S.A.B.E. Locations

Figures 8-5 and 8-6 provide maps of the two S.A.B.E. Rural Employment Area requests in Cainsville and New Durham. Overall, the nine requests total 125 gross ha (net of environmental features). The two Rural Employment Area S.A.B.E. requests were reviewed based on the Growth Plan, 2019 Policy 2.2.9.

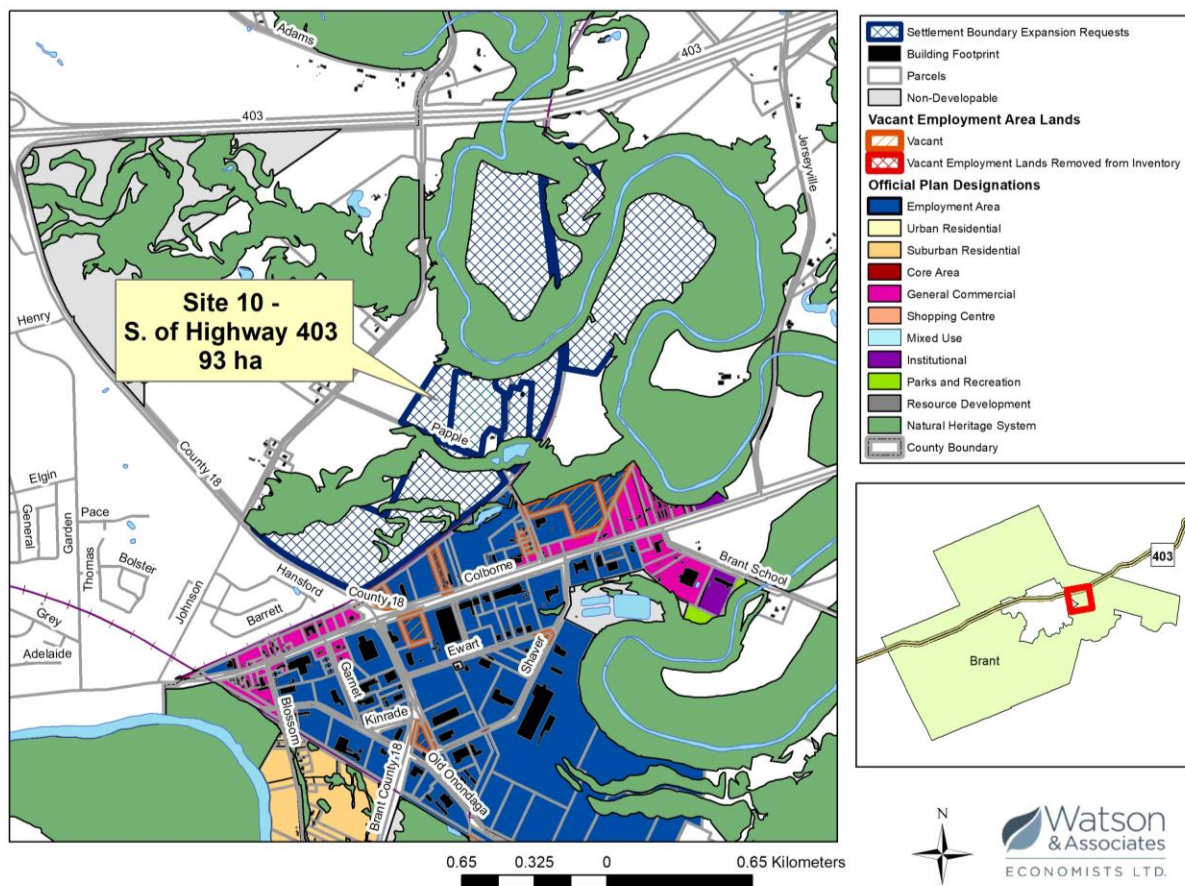
- Site 10 (Cainsville) is a large site of 93 ha. The S.A.B.E. is not part of a proposal for an expansion of existing use or businesses. As such, based on the Growth Plan, 2019, expansion does not meet the requirement for S.A.B.E. for Rural



Employment Areas. Further, it is important to note that the site consists of a large supply of vacant land which provides opportunities for existing businesses to expand within Cainsville over the longer term.

- Site 11 (New Durham) involves the expansion of the existing operation, requiring 23 ha of land. The expansion would allow a larger employer to expand its operations. Based on the Growth Plan, 2019, the request meets the S.A.B.E. requirements for a rural S.A.B.E., contingent on agricultural impact and M.D.S. requirements.

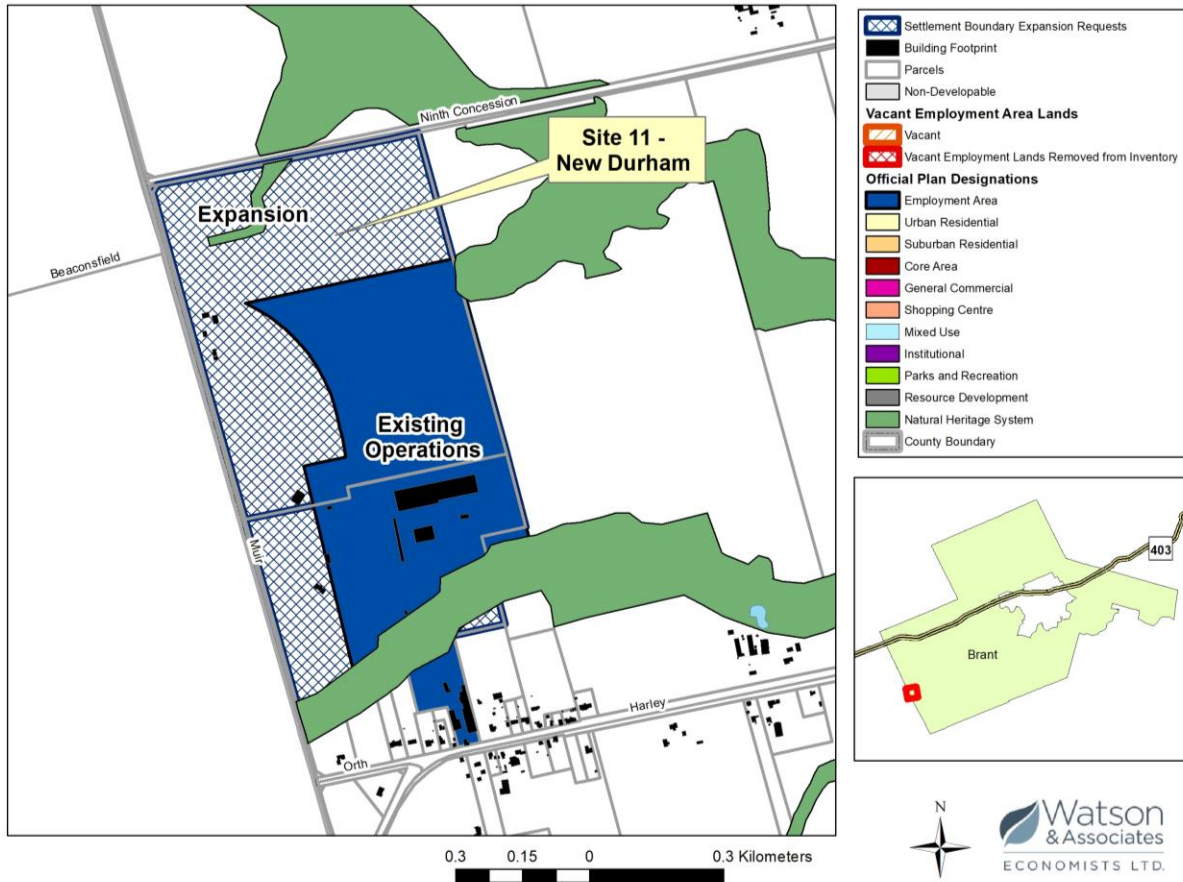
Figure 8-5
County of Brant
S.A.B.E. Rural Employment Area Requests



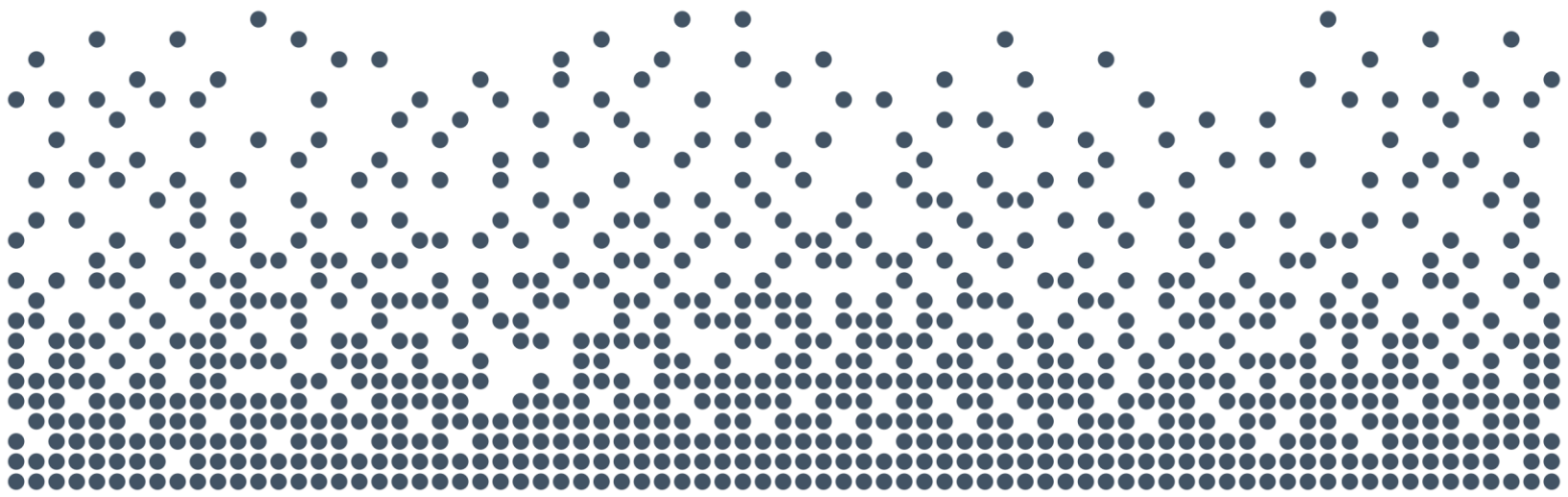
Note: Figure includes current County of Brant O.P. (2012) Designations.



Figure 8-6
County of Brant
S.A.B.E. Rural Employment Area Requests



Note: Figure includes current County of Brant O.P. (2012) Designations.



Chapter 9

Conclusions



9. Conclusions

Based on the comprehensive analysis carried out herein, it has been determined that the County has a surplus of Community Area land of approximately 395 gross ha to 2051. These surplus lands are not considered to be needed until the post-2051 period and will be subject on ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered interchangeable with the identified shortfall of Urban Employment Areas, which is identified in Chapter 6. It is recommended that the County's new O.P. identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.

The County of Brant has a surplus of approximately 49 ha of designated urban commercial land to accommodate commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.

The County has a shortfall of designated Urban Employment Area lands of approximately 105 gross ha. The shortfall within Paris is approximately 110 ha, and St. George has a small surplus of 5 gross ha. The County should explore options to add additional Urban Employment Areas, including expanding the settlement area boundary in Paris to accommodate additional Employment Area lands in the Paris 403 Business Park. The County received several requests for S.A.B.E.s in this area. The Paris 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

The S.A.B.E. requests in the Paris 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes which will be submitted to and examined by the Province for review and approval:

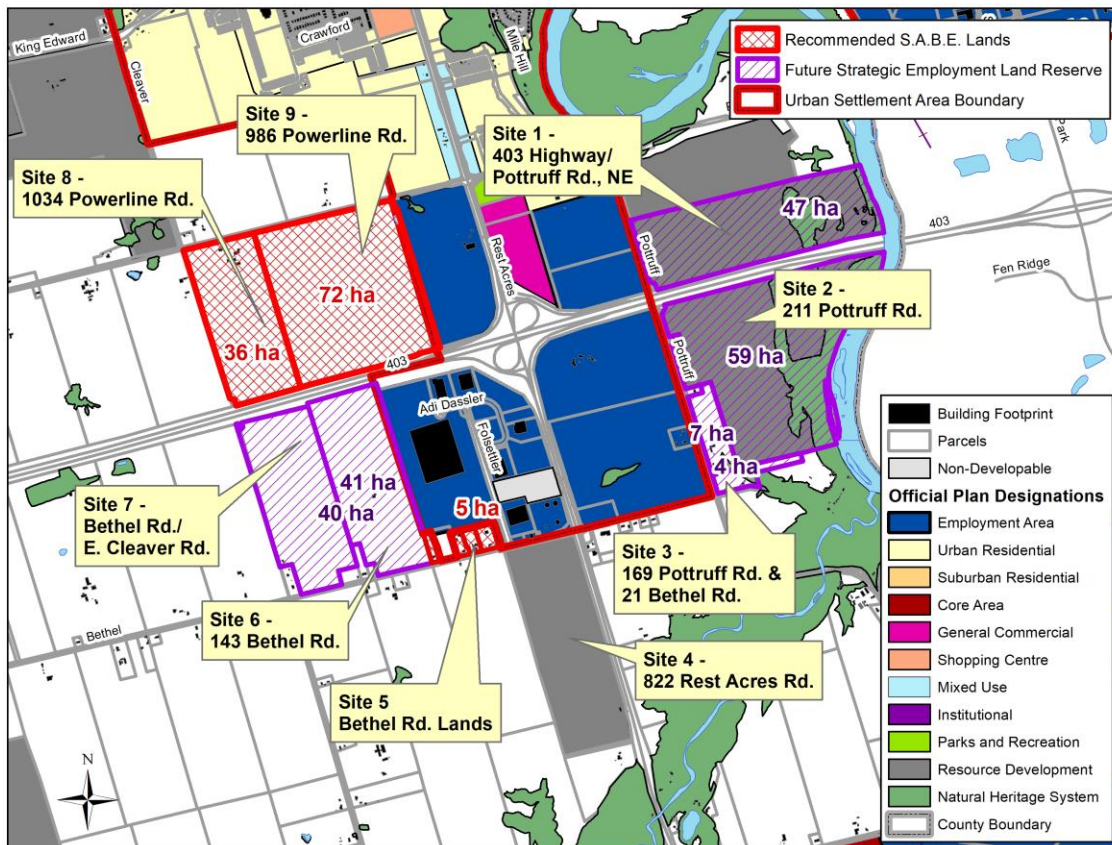
- Municipal Servicing (Water/Wastewater and Transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction Impacts;
- Land-Use Planning; and



- Market Analysis.

As part of the S.A.B.E. analysis, the County identified areas for immediate need by 2051 (approximately 113 ha), as well as Future Strategic Employment Reserve lands (approximately 198 ha) which are identified for future S.A.B.E. if demand warrants over the 2051 horizon. Sites recommended for S.A.B.E. and as Future Strategic Employment Reserve are identified in Figure 9-1.

Figure 9-1
County of Brant
S.A.B.E. Sites Reviewed



0.8 0.4 0 0.8 Kilometres

Watson & Associates
ECONOMISTS LTD.

Note: Figure includes current County of Brant O.P. (2012) Designations.

The County reviewed six requests for Employment Area land conversions. It is recommended that all sites requested for conversion remain as Employment Areas,



except for 326 Grand River St. N., a site which is recommended to broaden the permissions for commercial uses as part of the proposed Grand River St. N. corridor overlay. A conversion request site evaluation has been completed for each Employment Area and is provided in Appendix K.

A preliminary policy directions report has been prepared and is informed based on the findings of this M.C.R. report, as well as consultation with the public and Council. The preliminary policy direction report was completed in tandem with this M.C.R. report. Key technical findings and milestones of the M.C.R. were presented to Council and the public over the past year. This M.C.R. report primarily includes information to support the growth management policy theme of the County's new O.P. These preliminary directions aim to inform and develop policies and procedures for the County of Brant to the year 2051, based on seven strategic directions. The County's new O.P. has been completed in draft form for public comment.



Appendix A

County of Brant Housing Headship Rates



Appendix A: County of Brant Housing Headship Rates, 2016 to 2051

Figure A-1: County Brant, Housing Headship Rates, 2016 to 2051

Age Cohort	Household Headship Rates									
	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-14	-	-	-	-	-	-	-	-	-	-
15-24	3.6%	4.7%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%
25-34	34.2%	31.4%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%
35-44	47.8%	47.8%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%
45-54	50.2%	48.9%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%
55-64	52.4%	56.9%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%
65-74	57.8%	55.8%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%
75+	62.6%	60.9%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%
Total	34.2%	35.3%	35.2%	35.8%	36.2%	36.4%	36.6%	36.9%	37.1%	37.3%

Source: 2006 to 2016 derived from Statistics Canada Census data, and 2016 to 2051 by Watson & Associates Economists Ltd.



Appendix B

County of Brant Population and Housing Forecast



Appendix B: County of Brant Population and Housing Forecast

Figure B-1: County of Brant, Population and Housing to 2051

	Year	Population (Including Census undercount) ¹	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Other	Total Households	
Historical	Mid-2001	32,900	31,700	600	31,100	10,060	410	570	30	11,060	2.98
	Mid-2006	35,800	34,400	500	33,900	11,090	570	530	60	12,240	2.92
	Mid-2011	36,700	35,600	600	35,100	11,640	600	600	100	12,940	2.84
	Mid-2016	37,800	36,700	800	35,900	11,910	750	610	50	13,310	2.84
Forecast	Mid-2021	40,500	39,300	900	38,400	12,770	1,030	640	50	14,500	2.79
	Mid-2026	43,800	42,500	1,000	41,500	13,700	1,260	810	50	15,820	2.77
	Mid-2031	47,000	45,600	1,100	44,600	14,580	1,460	1,030	50	17,110	2.75
	Mid-2036	50,100	48,600	1,100	47,500	15,370	1,610	1,300	50	18,330	2.73
	Mid-2041	53,000	51,500	1,200	50,300	16,120	1,750	1,630	50	19,540	2.71
	Mid-2046	56,000	54,400	1,300	53,100	16,840	1,850	2,040	50	20,770	2.70
	Mid-2051	59,000	57,300	1,300	56,000	17,490	1,950	2,500	50	21,990	2.68
Incremental	Mid-2001 to Mid-2006	2,900	2,700	-100	2,800	1,030	160	-40	30	1,180	
	Mid-2006 to Mid-2011	900	1,200	100	1,200	550	30	70	40	700	
	Mid-2011 to Mid-2016	1,100	1,100	200	800	270	150	10	-50	370	
	Mid-2016 to Mid-2021	2,700	2,600	100	2,500	860	280	30	0	1,190	
	Mid-2016 to Mid-2031	9,200	8,900	300	8,700	2,670	710	420	0	3,800	
	Mid-2016 to Mid-2041	15,200	14,800	400	14,400	4,210	1,000	1,020	0	6,230	
	Mid-2016 to Mid-2051	21,200	20,600	500	20,100	5,580	1,200	1,890	0	8,680	

¹ Census undercount estimated at approximately 3.0%. Note: Population has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure B-2: County of Brant, Total Population Forecast by Major Age Group, 2016 to 2051

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	9,200	9,300	8,900	8,800	9,100	9,700	10,300	10,700	11,300	11,700	12,200
20-34	5,400	6,000	6,000	6,200	6,400	6,700	6,900	7,300	7,600	8,000	8,200
35-44	5,500	5,400	4,700	4,500	4,800	5,100	5,300	5,600	5,700	6,000	6,600
45-54	5,000	5,700	6,100	5,700	5,400	5,600	6,100	6,400	6,600	7,100	7,300
55-64	3,300	4,400	5,300	5,700	6,300	6,300	6,000	6,300	6,800	7,100	7,400
65-74	2,400	2,700	3,100	4,000	5,000	5,600	6,200	6,300	6,100	6,400	6,900
75+	2,100	2,300	2,500	2,900	3,600	4,800	6,200	7,500	8,900	9,800	10,400
Total	32,900	35,800	36,700	37,800	40,500	43,800	47,000	50,100	53,000	56,000	59,000

Source: 2001 to 2016 Derived from from Statistics Canada, Demography Division. 2016 to 2051 forecast by Watson & Associates Economists Ltd.

¹ Population includes Census undercount. Forecast population includes net Census undercount of approximately 3.0%.

Note: Figures may not add precisely due to rounding.

Figure B-3: County of Brant, Total Population Forecast Shares by Major Age Group, 2016 to 2051

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	28%	26%	24%	23%	22%	22%	22%	21%	21%	20.8%	20.7%
20-34	16%	17%	16%	16%	16%	15%	15%	15%	14%	14.3%	13.8%
35-44	17%	15%	13%	12%	12%	12%	11%	11%	11%	10.8%	11.1%
45-54	15%	16%	17%	15%	13%	13%	13%	13%	12%	12.6%	12.4%
55-64	10%	12%	15%	15%	16%	14%	13%	13%	13%	12.7%	12.6%
65-74	7%	7%	8%	11%	12%	13%	13%	13%	11%	11.4%	11.7%
75+	6%	7%	7%	8%	9%	11%	13%	15%	17%	17.4%	17.7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100.0%	100.0%

Source: 2001 to 2016 Derived from from Statistics Canada, Demography Division. 2016 to 2051 forecast by Watson & Associates Economists Ltd.

¹ Population includes Census undercount. Forecast population includes net Census undercount of approximately 3.0%.

Note: Figures may not add precisely due to rounding.



Appendix C

County of Brant Population, Housing and Employment Forecasts by Urban Growth Settlement Area and Rural System



Appendix C-1: County of Brant Total Population and Housing Forecasts by Urban Growth Settlement Area and Rural System

Figure C-1: County of Brant Population, Housing and Employment, 2016 to 2051

Area	Forecast Period	Total Population With Undercount ¹	Total Residential Units	Persons Per Unit (P.P.U.)	Total Employment (Including N.F.P.O.W.) ²	Employment Activity Rate
Paris	2016	12,700	4,735	2.68	7,400	58.4%
	2021	14,400	5,460	2.64	8,300	57.9%
	2031	18,800	7,195	2.61	10,700	57.1%
	2041	21,900	8,435	2.60	13,100	59.6%
	2051	25,400	9,870	2.57	15,500	61.2%
	2016-2051	12,700	5,135		8,100	
St. George	2016	3,400	1,200	2.83	1,200	34.9%
	2021	3,500	1,265	2.77	1,200	35.3%
	2031	4,300	1,550	2.77	1,500	35.5%
	2041	6,000	2,235	2.68	2,200	36.0%
	2051	7,500	2,850	2.63	3,000	39.2%
	2016-2051	4,100	1,650		1,800	
Rural System	2016	21,800	7,330	2.97	6,300	29.1%
	2021	22,600	7,730	2.92	6,500	28.8%
	2031	24,000	8,330	2.88	6,800	28.3%
	2041	25,100	8,825	2.84	7,100	28.4%
	2051	26,100	9,225	2.83	7,500	28.8%
	2016-2051	4,300	1,895		1,200	
County of Brant	2016	37,800	13,265	2.85	14,900	39.4%
	2021	40,500	14,455	2.80	16,100	39.7%
	2031	47,000	17,070	2.75	19,000	40.4%
	2041	53,000	19,500	2.72	22,300	42.1%
	2051	59,000	21,940	2.69	26,000	44.1%
	2016-2051	21,200	8,675		11,100	

¹ Population includes net Census undercount at approximately 3.0%.

² Statistics Canada defines employees with no fixed place of work as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Source: Watson & Associates Economists Ltd.



Appendix C-2: County of Brant Detailed Population and Forecasts by Urban Growth Settlement Area and Rural System

Figure C-2: Paris Population and Housing Forecast, 2016 to 2051

Year	Population (Including Census Undercount) ¹	Households				Persons Per Unit (P.P.U.)
		Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	12,700	3,665	560	510	4,735	2.60
2021	14,400	4,065	850	545	5,460	2.56
2026	16,700	4,585	1,065	715	6,365	2.55
2031	18,800	5,030	1,230	935	7,195	2.53
2036	20,400	5,370	1,365	1,120	7,855	2.53
2041	21,900	5,700	1,430	1,305	8,435	2.53
2046	23,700	6,040	1,515	1,605	9,160	2.51
2051	25,400	6,355	1,585	1,930	9,870	2.49
Incremental						
2016-2021	1,700	400	290	35	725	
2021-2031	4,400	965	380	390	1,735	
2021-2041	7,500	1,635	580	760	2,975	
2021-2051	11,000	2,290	735	1,385	4,410	

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached houses as well as “other” detached houses as per Statistics Canada.

³ Includes all townhouses and apartments in duplexes.

⁴ Includes all apartments with less than or greater than five storeys.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-3: St. George, Population and Housing Forecast, 2016 to 2051

Year	Population (Including Census Undercount) ¹	Households				Persons Per Unit (P.P.U.)
		Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	3,400	1,090	70	40	1,200	2.75
2021	3,500	1,155	70	40	1,265	2.69
2026	3,700	1,215	80	40	1,335	2.62
2031	4,300	1,395	115	40	1,550	2.65
2036	4,900	1,570	115	125	1,810	2.65
2041	6,000	1,795	175	265	2,235	2.60
2046	6,900	2,025	190	375	2,590	2.59
2051	7,500	2,125	210	515	2,850	2.56
Incremental						
2016-2021	100	65	-	-	65	
2021-2031	800	240	45	-	285	
2021-2041	2,500	640	105	225	970	
2021-2051	4,000	970	140	475	1,585	

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached house as well as “other” detached houses as per Statistics Canada.

³ Includes all townhouses and apartments in duplexes.

⁴ Includes all apartments with less than or greater than five storeys.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-4: Rural System, Population and Housing Forecast, 2016 to 2051

Year	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
		Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	21,800	7,155	115	60	7,330	2.88
2021	22,600	7,555	115	60	7,730	2.83
2026	23,400	7,905	115	60	8,080	2.81
2031	24,000	8,155	115	60	8,330	2.80
2036	24,700	8,430	140	60	8,630	2.78
2041	25,100	8,625	140	60	8,825	2.76
2046	25,400	8,770	145	60	8,975	2.75
2051	26,100	9,015	150	60	9,225	2.74
2016-2021	800	400	-	-	400	
2021-2031	1,400	600	-	-	600	
2021-2041	2,500	1,070	25	-	1,095	
2021-2051	3,500	1,460	35	-	1,495	

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached houses as well as “other” detached houses as per Statistics Canada.

³ Includes all townhouses and apartments in duplexes.

⁴ Includes all apartments with less than or greater than five storeys.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure C-5: Housing Forecast by Urban Growth Settlement Area and Rural System, 2016 to 2051

Year	Paris	St. George	Rural System	County of Brant
Total Households				
2016	4,735	1,200	7,330	13,265
2021	5,460	1,265	7,730	14,455
2026	6,365	1,335	8,080	15,775
2031	7,195	1,550	8,330	17,070
2036	7,855	1,810	8,630	18,290
2041	8,435	2,235	8,825	19,500
2046	9,160	2,590	8,975	20,725
2051	9,870	2,850	9,225	21,940
Share of 2016 County Households	36%	9%	55%	100%
Share of 2051 County Households	45%	13%	42%	100%
Housing Growth				
2016 - 2051	5,135	1,650	1,895	8,675
Annual Growth Rate, 2016 - 2051	2.1%	2.5%	0.7%	1.4%
Share of Household Growth, 2016 - 2051	59%	19%	22%	100%

Source: Watson & Associates Economists Ltd.



Appendix C-3: County of Brant Employment Forecasts by Urban Growth Settlement Area and Remaining Rural Area

Figure C-6: County of Brant Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	3,800	4,800	8,600	3,500	2,800	6,300	14,900	58%	42%
2021	4,300	5,300	9,600	3,500	3,000	6,500	16,100	60%	40%
2026	5,000	5,900	10,900	3,600	3,000	6,600	17,600	62%	38%
2031	5,700	6,500	12,200	3,700	3,100	6,800	19,000	64%	36%
2036	6,500	7,200	13,600	3,700	3,200	6,900	20,600	66%	34%
2041	7,300	7,900	15,200	3,800	3,300	7,100	22,300	68%	32%
2046	8,100	8,700	16,800	3,800	3,500	7,300	24,100	70%	30%
2051	8,900	9,600	18,500	3,900	3,600	7,500	26,000	71%	29%
Incremental Growth									
2016 - 2021	500	500	1,000	0	100	200	1,200	85%	15%
2016 - 2026	1,200	1,100	2,400	100	200	300	2,700	89%	11%
2016 - 2031	1,900	1,700	3,700	200	300	400	4,100	89%	11%
2016 - 2036	2,700	2,400	5,100	200	400	600	5,700	89%	11%
2016 - 2041	3,500	3,100	6,600	300	500	800	7,400	89%	11%
2016 - 2046	4,300	3,900	8,200	300	700	1,000	9,200	89%	11%
2016 - 2051	5,100	4,800	9,900	400	800	1,200	11,100	89%	11%

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure C-7: Paris Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	3,300	4,100	7,400	0	0	0	7,400	100%	0%
2021	3,800	4,500	8,300	0	0	0	8,300	100%	0%
2026	4,500	5,100	9,600	0	0	0	9,600	100%	0%
2031	5,100	5,600	10,700	0	0	0	10,700	100%	0%
2036	5,800	6,100	11,900	0	0	0	11,900	100%	0%
2041	6,500	6,500	13,100	0	0	0	13,100	100%	0%
2046	7,200	7,100	14,300	0	0	0	14,300	100%	0%
2051	7,900	7,600	15,500	0	0	0	15,500	100%	0%
Incremental Growth									
2016 - 2021	500	400	900	0	0	0	900	100%	0%
2016 - 2026	1,200	1,000	2,200	0	0	0	2,200	100%	0%
2016 - 2031	1,800	1,500	3,300	0	0	0	3,300	100%	0%
2016 - 2036	2,500	2,000	4,400	0	0	0	4,400	100%	0%
2016 - 2041	3,200	2,400	5,600	0	0	0	5,600	100%	0%
2016 - 2046	3,900	3,000	6,900	0	0	0	6,900	100%	0%
2016 - 2051	4,600	3,500	8,100	0	0	0	8,100	100%	0%

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-8: St. George Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	500	700	1,200	0	0	0	1,200	100%	0%
2021	500	700	1,200	0	0	0	1,200	100%	0%
2026	500	800	1,300	0	0	0	1,300	100%	0%
2031	600	900	1,500	0	0	0	1,500	100%	0%
2036	700	1,100	1,800	0	0	0	1,800	100%	0%
2041	800	1,400	2,200	0	0	0	2,200	100%	0%
2046	900	1,600	2,500	0	0	0	2,500	100%	0%
2051	1,000	1,900	3,000	0	0	0	3,000	100%	0%
Incremental Growth									
2016 - 2021	0	0	100	0	0	0	100	100%	0%
2016 - 2026	100	100	200	0	0	0	200	100%	0%
2016 - 2031	100	200	300	0	0	0	300	100%	0%
2016 - 2036	200	400	600	0	0	0	600	100%	0%
2016 - 2041	300	700	1,000	0	0	0	1,000	100%	0%
2016 - 2046	400	900	1,400	0	0	0	1,400	100%	0%
2016 - 2051	500	1,200	1,800	0	0	0	1,800	100%	0%

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure C-9: Rural System Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	0	0	0	3,500	2,800	6,300	6,300	0%	100%
2021	0	0	0	3,500	3,000	6,500	6,500	0%	100%
2026	0	0	0	3,600	3,000	6,600	6,600	0%	100%
2031	0	0	0	3,700	3,100	6,800	6,800	0%	100%
2036	0	0	0	3,700	3,200	6,900	6,900	0%	100%
2041	0	0	0	3,800	3,300	7,100	7,100	0%	100%
2046	0	0	0	3,800	3,500	7,300	7,300	0%	100%
2051	0	0	0	3,900	3,600	7,500	7,500	0%	100%
Incremental Growth									
2016 - 2021	0	0	0	0	100	200	200	0%	100%
2016 - 2026	0	0	0	100	200	300	300	0%	100%
2016 - 2031	0	0	0	200	300	400	400	0%	100%
2016 - 2036	0	0	0	200	400	600	600	0%	100%
2016 - 2041	0	0	0	300	500	800	800	0%	100%
2016 - 2046	0	0	0	300	700	1,000	1,000	0%	100%
2016 - 2051	0	0	0	400	800	1,200	1,200	0%	100%

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.



Appendix C-10: County of Brant Employment by Urban Growth Settlement Area and Rural System, 2051

Year	Paris	St. George	Rural System	County of Brant
Total Employment				
2016	7,400	1,200	6,300	14,900
2021	8,300	1,200	6,500	16,100
2026	9,600	1,300	6,600	17,600
2031	10,700	1,500	6,800	19,000
2036	11,900	1,800	6,900	20,600
2041	13,100	2,200	7,100	22,300
2046	14,300	2,500	7,300	24,100
2051	15,500	3,000	7,500	26,000
Share of 2016 Employment	50%	8%	42%	100%
Share of 2051 Employment	60%	11%	29%	100%
Employment Growth				
2016 - 2051	8,100	1,800	1,200	11,100
Annual Growth Rate, 2016 to 2051	2%	3%	0%	2%
Share of Employment Growth, 2016 to 2051	73%	16%	11%	100%

Note: Figures may not add precisely due to rounding.
 Source: Watson & Associates Economists Ltd.



Appendix C-4: County of Brant Employment Forecasts by Employment Location Type

Figure C-11
County of Brant
Employment by Type and Location Type, 2021

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,300	0	0	5,300	33%
Urban Community Areas	4,200	0	0	0	4,200	26%
Rural Employment Areas	0	0	3,600	300	3,900	24%
Other Rural	0	0	0	2,700	2,700	17%
Total	5,200	4,300	3,600	3,000	16,100	100%
Share (%)	32%	27%	22%	19%	100%	

Source: Watson & Associates Economists Ltd.

Figure C-12
County of Brant
Employment by Type and Location Type, 2051

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	2,000	9,000	0	0	11,000	42%
Urban Community Areas	7,500	0	0	0	7,500	29%
Rural Employment Areas	0	0	3,900	400	4,300	17%
Other Rural	0	0	0	3,400	3,400	12%
Total	9,500	9,000	3,900	3,800	26,000	100%
Share (%)	37%	35%	15%	14%	100%	

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-13
County of Brant
Employment by Type and Location Type, 2021 – 2051

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,700	0	0	5,700	58%
Urban Community Areas	3,300	0	0	0	3,300	33%
Rural Employment Areas	0	0	300	100	400	4%
Other Rural	0	0	0	700	700	5%
Total	4,300	4,700	300	800	9,900	100%
Share (%)	44%	47%	3%	6%	100%	

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-14
County of Brant
Paris and St. George Urban Employment Areas
Employment by Type and Location Type by 2051

Urban Employment Areas	Paris Employment Areas	St. George Employment Areas	Urban Employment Area: Paris & St. George (Rounded)
Developed			
Employment	4,700	560	5,300
Employment Lands Employment (Industrial-Type)	3,720	500	4,200
Population-Related Employment (Commercial/Institutional)	980	60	1,000
Land Area, Gross ha	313	43	400
Density (jobs/ha)	15	13	13
Employment Area, % E.L.E.	79%	89%	79%
Employment Area, % P.R.E.	21%	11%	19%
2021 - 2051			
Employment	5,125	600	5,700
Employment Lands Employment (Industrial-Type)	4,150	540	4,700
Population-Related Employment (Commercial/Institutional)	975	60	1,000
Land Area, ha	342	46	388
Density	15	13	15
Employment Area, % E.L.E.	81%	90%	82%
Employment Area, % P.R.E.	19%	10%	18%
2051			
Employment	9,825	1,160	11,000
Employment Lands Employment (Industrial-Type)	7,870	1,040	8,900
Population-Related Employment (Commercial/Institutional)	1,955	120	2,100
Employment Area, % E.L.E.	80%	90%	81%
Employment Area, % P.R.E.	20%	10%	19%

Source: Watson & Associates Economists Ltd.

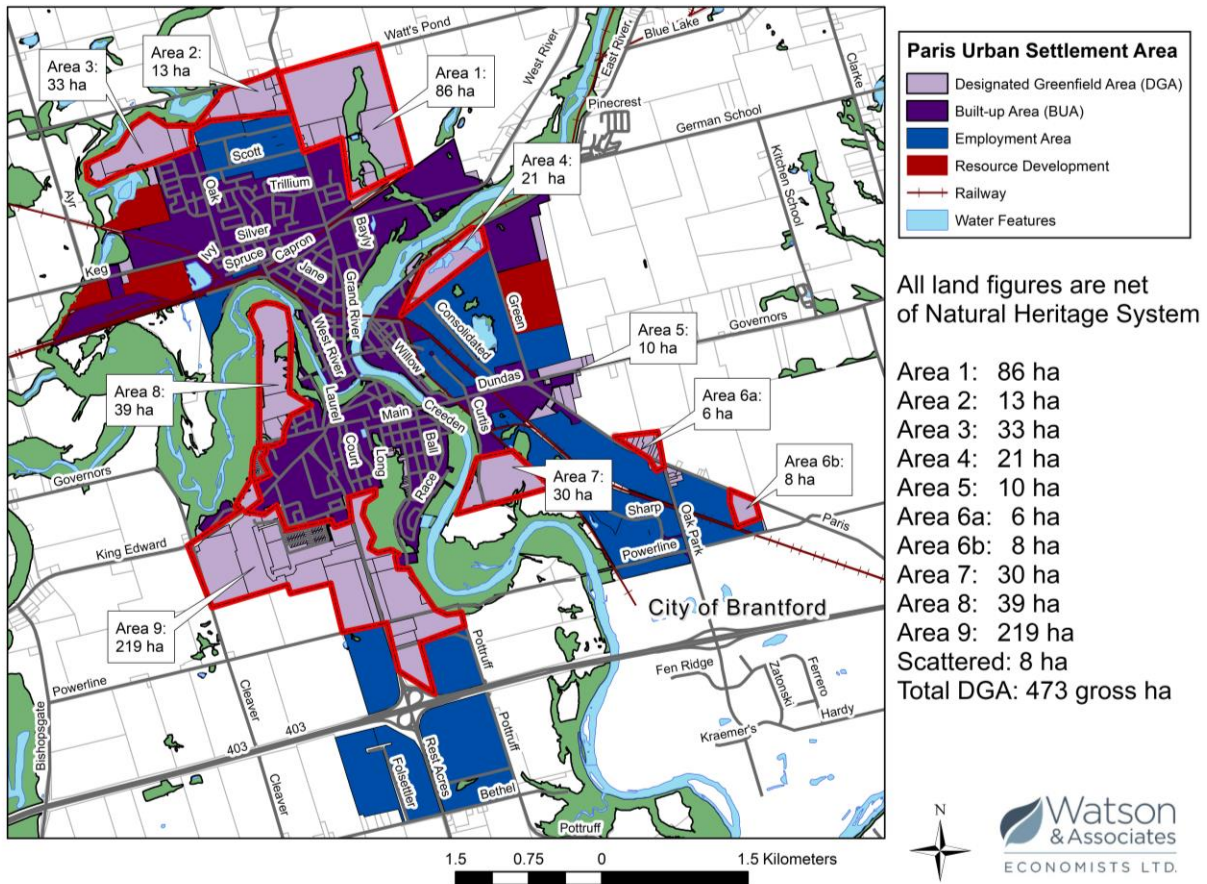


Appendix D

Community Area Land Supply Maps and Tables



Appendix D-1: Paris Community Area D.G.A. Land Area, Gross ha



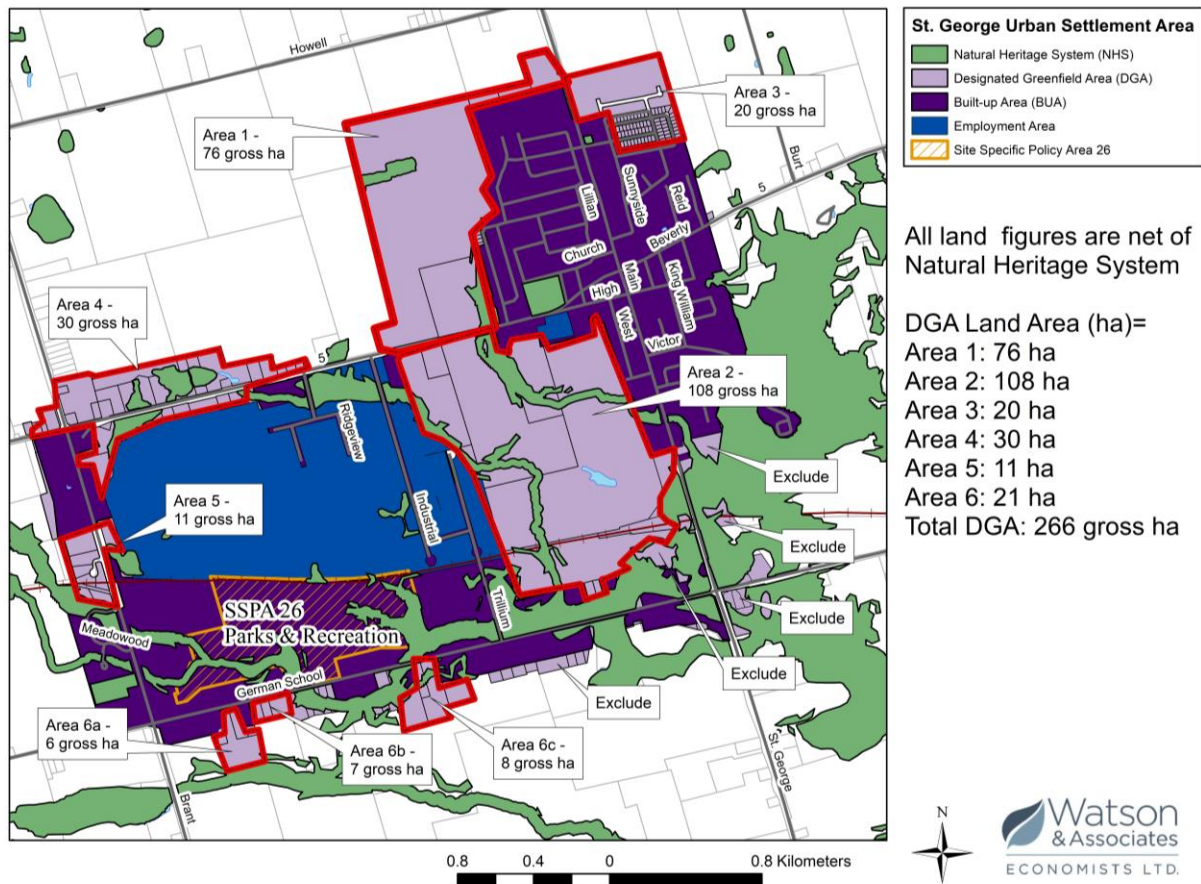
The D.G.A. within Paris has a total developable land area of 473 gross ha.

Land area, based on the total designated land area in the D.G.A., includes developed lands, vacant lands, parks/recreational lands and non-residential lands (except Employment Area lands).

Land area excludes Natural Heritage Systems, highways, utilities corridors and Employment Areas.



Appendix D-2: St. George Community Area D.G.A. Land Area, Gross ha



The D.G.A. within St. George has a total developable land area of 266 gross ha.

Land area, based on the total designated land area in the D.G.A., includes developed lands, vacant lands, parks/recreational lands and non-residential lands (except Employment Area lands).

Land area excludes Natural Heritage Systems, highways, utilities corridors and Employment Areas.



Appendix D-3: D.G.A. Developed and Approved Analysis

Paris

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	312	99	0	411	45	1,270	1,740	39
Draft Approved/Registered	1,712	612	919	3,243	167	8,850	9,100	55
Developed & Draft Approved/Registered	2,024	711	919	3,654	211	10,120	10,840	51

St. George

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	105	0	0	105	9	350	365	39
Draft Approved/Registered	1,957	232	592	2,781	160	8,100	8,380	52
Developed & Draft Approved/Registered	2,062	232	592	2,886	169	8,450	8,745	52

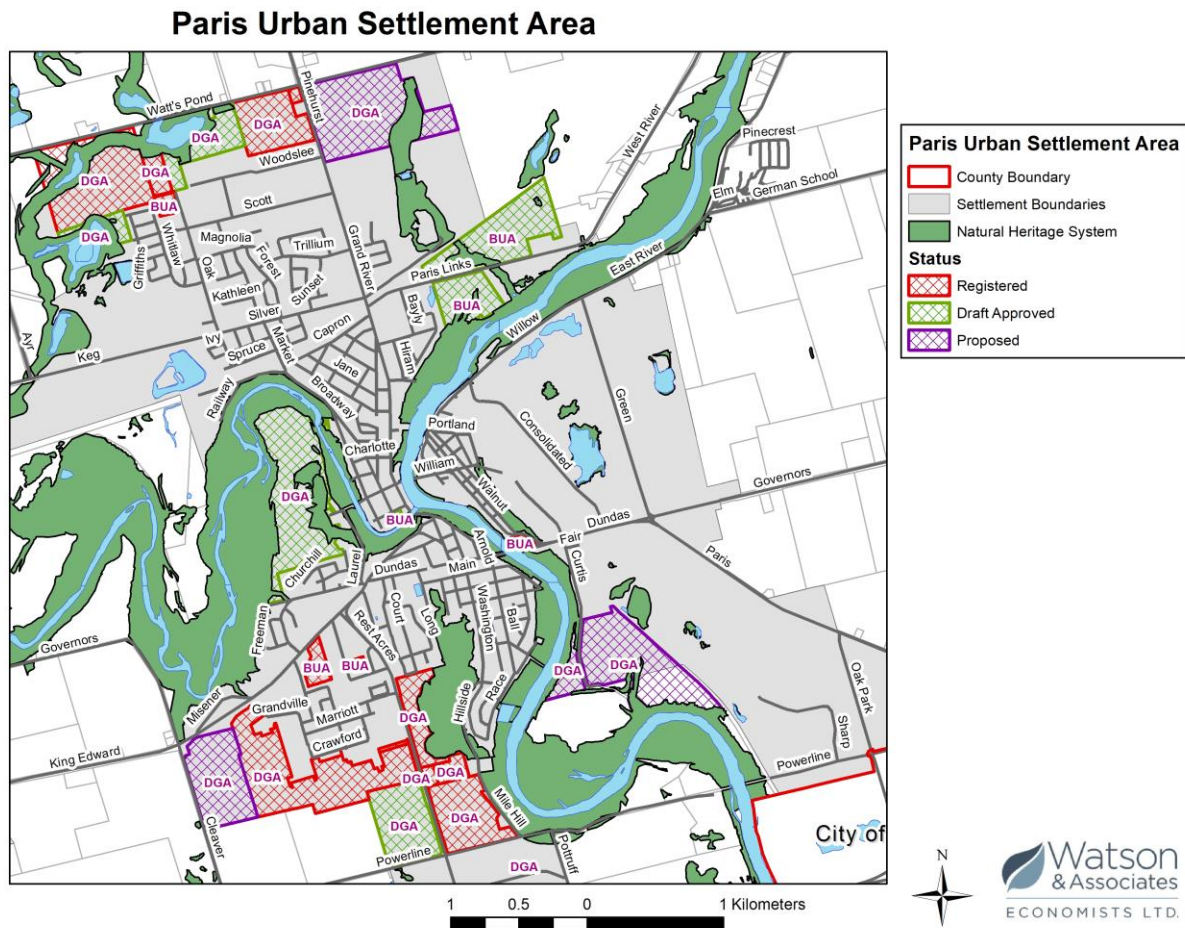
Paris & St. George

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed - Paris and St. George	417	99	0	516	54	1,620	2,100	39
Draft Approved/Registered	3,669	844	1,511	6,024	326	16,950	17,500	54
Developed & Draft Approved/Registered	4,086	943	1,511	6,540	380	18,570	19,600	52

Source: Watson & Associates Economists Ltd.



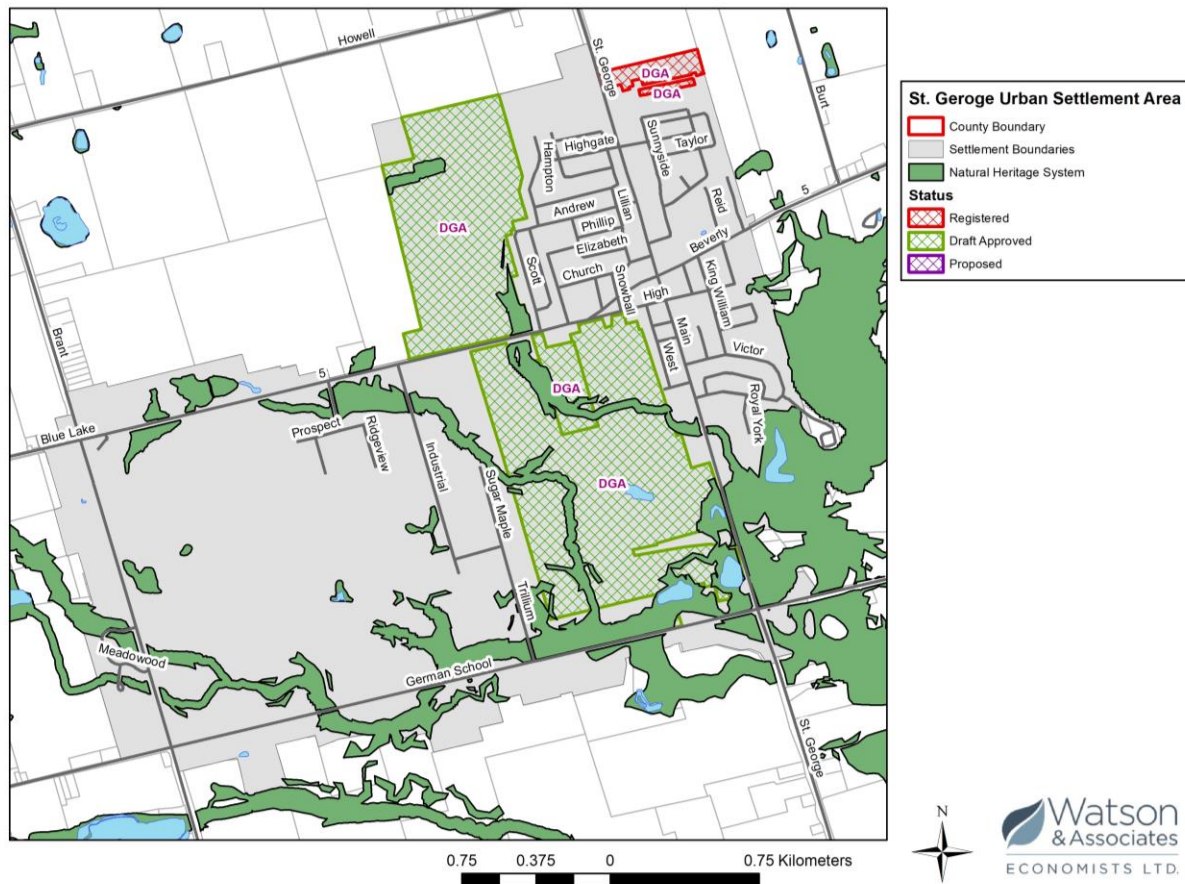
Appendix D-4: Active Residential Development in Paris (D.G.A./B.U.A.)



Map identifies the approximate land area of sites with residential development applications that are currently in the planning process, including approved and proposed developments.



Appendix D-5: Active Residential Development in St. George (D.G.A./B.U.A.)



Map identifies the approximate land area of sites with residential development applications currently in the planning process, including approved and proposed developments.

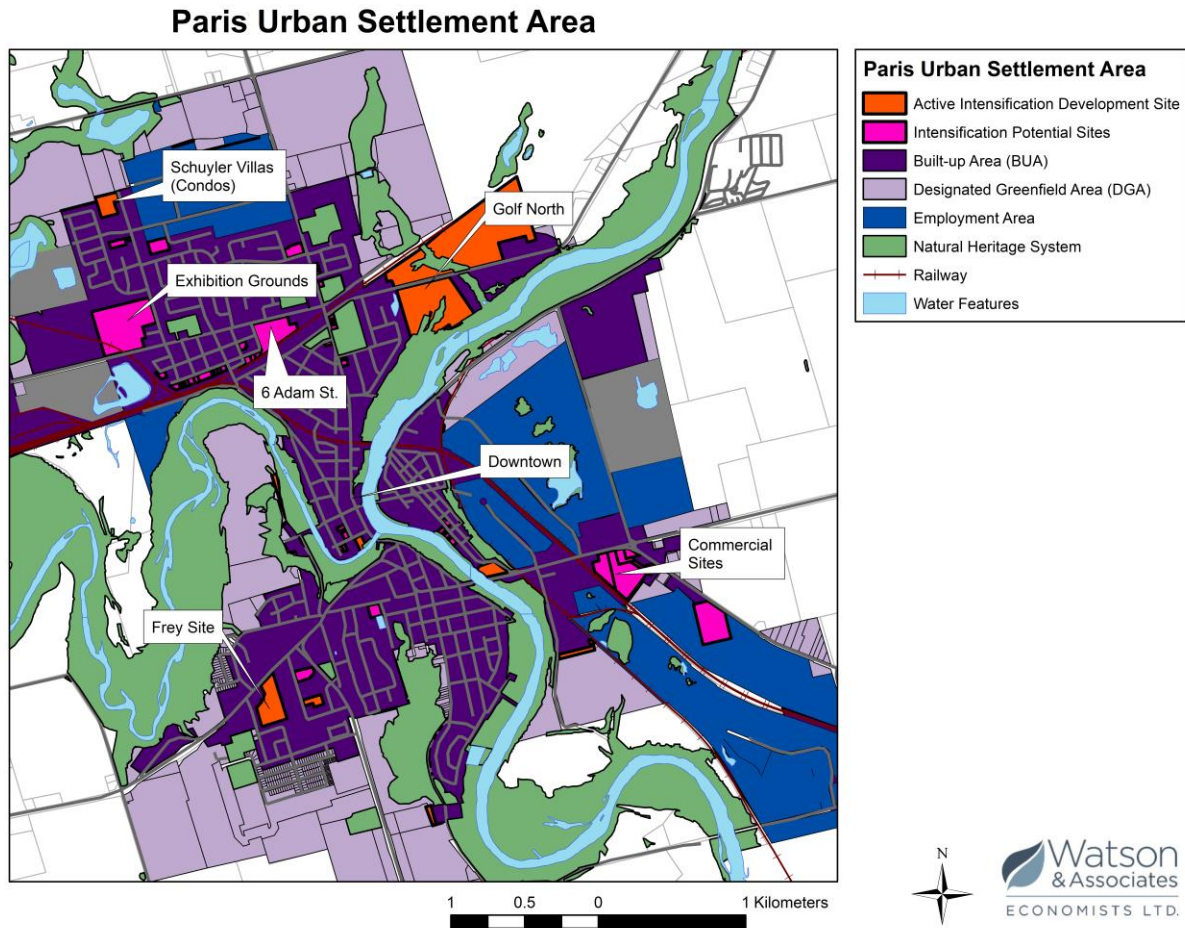


Appendix E

Intensification Opportunities to Accommodate Housing in Paris and St. George

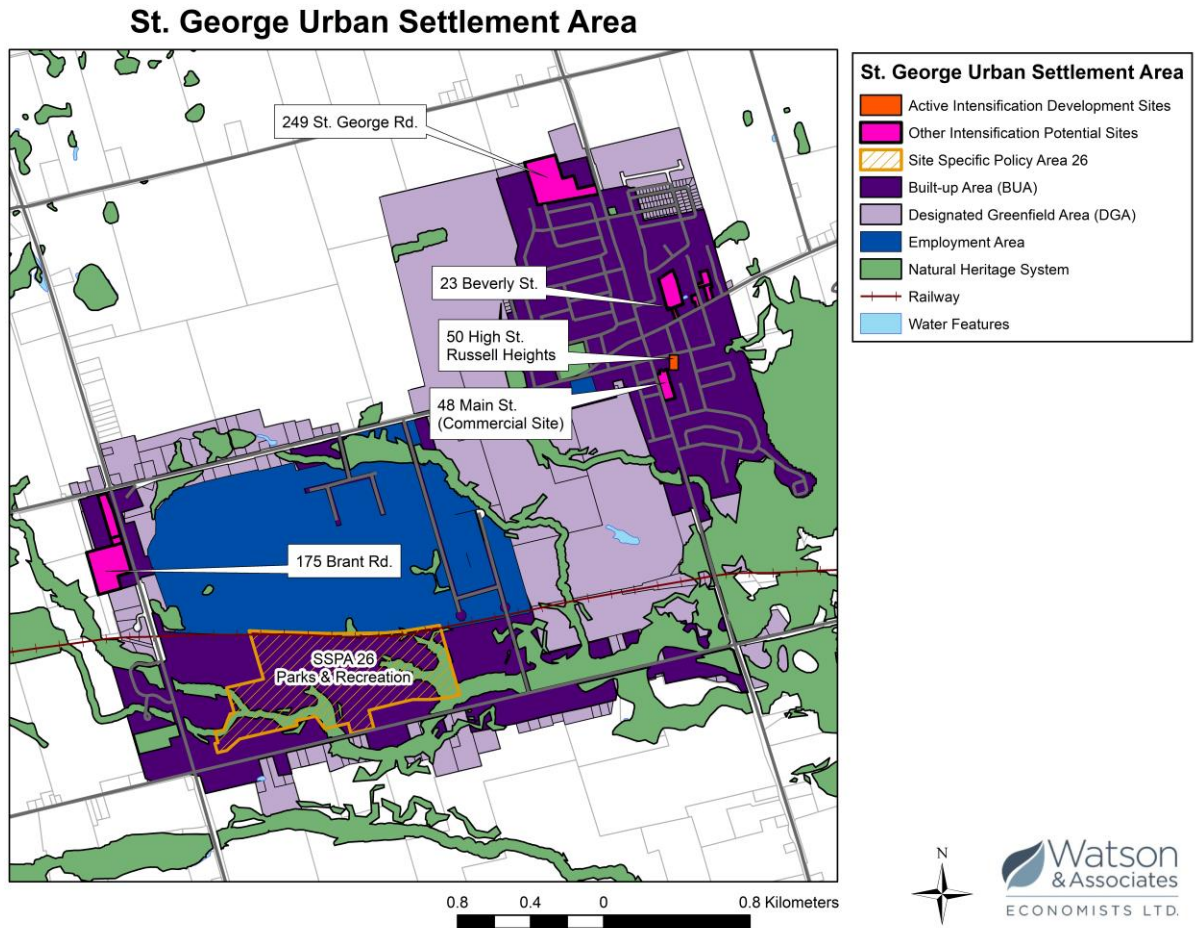


Appendix E-1: Intensification Opportunities to Accommodate Housing in Paris





Appendix E-2: Intensification Opportunities to Accommodate Housing in St. George





Appendix F

Commercial Built-Space Inventory in Paris and St. George



Appendix F-1: Commercial Built-Space Inventory in Paris

Dundas St./Paris Rd. Corridor

Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
34 Paris Rd	Vacant Building	Vacant	Vacant	700	0.01	0.5	1%	0	0
74 & 82 Dundas St	Harveys and Swiss Chalet	Food Services	Free-Standing	8,200	0.08	2.2	3%	20	9
30 Paris Rd	Paris Country Grill & Wine	Food Services	Free-Standing	2,900	0.03	0.7	4%	10	15
772 Governors Rd E	Furniture Store and Art Studio	Furniture Store	Free-Standing	4,000	0.04	0.7	5%	10	14
22 Paris Rd	Camp 31	Food Services	Free-Standing	2,300	0.02	0.3	6%	10	29
151 Dundas St. E	Tim Horton's	Food Services	Free-Standing	2,500	0.02	0.3	7%	10	29
156 Dundas St	EggsMart	Food Services	Free-Standing	1,900	0.02	0.2	7%	5	21
135 & 203 Dundas St E	Cardlock	Automotive Sales & Services	Free-Standing	7,700	0.07	0.7	10%	1	1
142 Dundas St E	Paris Factory Rides Automotive	Automotive Sales & Services	Free-Standing	5,600	0.05	0.4	12%	10	24
103 Dundas St E	Dealership	Automotive Sales & Services	Free-Standing	11,100	0.10	0.8	13%	30	40
15 Paris Rd	Motel	Accommodations	Free-Standing	6,700	0.06	0.4	16%	20	53
123 Dundas St E	Auto Service	Automotive Sales & Services	Free-Standing	2,900	0.03	0.2	16%	10	55
127 Dundas St E	Esso Gas Station	Automotive Sales & Services	Free-Standing	1,900	0.02	0.1	18%	2	18
65 Dundas St	PrimaCare Community Family H	Health Care	Medical Clinic	14,700	0.14	0.6	22%	40	65
12 Paris Rd	Rose Court Motel	Accommodations	Other	4,800	0.04	0.2	26%	5	29
71 Dundas St	No Frills	Food Store	Free-Standing	30,000	0.28	1.0	27%	80	76
72 Dundas St	Starbucks	Food Services	Free-Standing	3,000	0.03	0.1	28%	10	99
535 Paris Road	Brantford Granite & Quartz	Building Supplies Stores	Free-Standing	28,800	0.27	1.0	27%	20	20
sub-Total				139,700	1	10	12%	293	28



Paris Downtown Core

Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
121 Grand River St. N	Vacant Building	Vacant	Vacant Storefront	800	0.01	0.1	15%	0	0
120 Grand River St. N	Dental Office	Health Care	Medical Clinic	4,000	0.04	0.2	20%	10	53
139 Grand River St. N	Medical Clinic	Health Care	Medical Clinic	9,800	0.09	0.5	20%	20	44
25 Mechanic Street	LCBO	Beer, Wine & Liquor Store	Free-Standing	5,500	0.05	0.2	21%	10	41
127 Grand River St. N	Vacant Building	Vacant	Vacant Storefront	1,100	0.01	0.0	26%	0	0
138 Grand River St. N	Spa	Personal Services	Other	3,400	0.03	0.1	35%	10	111
The Paris Wincey Mills	Mixed-Use Complex	Office	Mixed-Use Complex	31,000	0.29	0.7	38%	60	80
105 - 119 Grand River St	6 Storefronts	Various	Storefront	7,700	0.07	0.2	40%	20	111
19, 21, 23, 27, 29 & 33 W	Storefronts	Various	Storefront	12,700	0.12	0.2	49%	30	124
106 Grand River St N	Arlington Hotel	Accommodations	Hotel	7,200	0.07	0.1	57%	5	43
86, 80, 72 & 68 Grand Ri	Storefronts	Various	Storefront	17,600	0.16	0.2	65%	40	161
1 to 97 Grand River St N	Storefronts	Various	Storefront	42,800	0.39	0.6	71%	90	164
66 Grand River St N	Brant County Office	Institutional Use in Retail	Institutional	18,300	0.07	0.1	79%	40	449
30, 32, 38, 40, 44, 48, 50	Storefronts	Various	Storefront	19,700	0.18	0.2	93%	40	207
6, 8, 10, 14, 16, 20, 24 &	Storefronts	Various	Storefront	15,900	0.15	0.2	98%	30	197
				197,500	1.72	4	48%	405	113

Grand River St. N. Corridor

Node	Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
Grand River St. N.	340 Grand River St. N (E	Car Wash & Pizza Restaurant	Food Services/Automotive Services	Free-Standing	4,700	0.0	0.6	7%	5	8
Grand River St. N.	304 Grand River St. N (E	Tim Horton's	Food Services	Free-Standing	2,500	0.0	0.2	9%	10	45
Grand River St. N.	308 Grand River St. N (E	Employment Area Land Site)	Food Services	Plaza	5,900	0.0	0.1	38%	10	167
Grand River St. N.	307 Grand River St. N	McDonalds	Food Services	Free-Standing	3,500	0.0	0.3	12%	10	38
Grand River St. N.	303 Grand River St. N	Dollarama	General Merchandise	Free-Standing	10,500	0.1	0.7	14%	11	16
Grand River St. N.	184 Grand River St. N	Funeral Home	Other	Other	5,000	0.05	0.3	15%	5	16
Grand River St. N.	279 Grand River St. N	Shell	Automotive Sales & Services	Free-Standing	2,500	0.0	0.2	15%	2	13
Grand River St. N.	246 & 248 Grand River S	Home Building Centre	Building Supplies Stores	Free-Standing	11,800	0.11	0.5	20%	30	56
Grand River St. N.	280 & 300 Grand River S	Canadian Tire	General Merchandise	Plaza	66,500	0.6	2.4	26%	130	54
Grand River St. N.	321 Grand River St. N	Paris Vet Clinic	Professional Services	Office	5,500	0.1	0.2	27%	10	52
Grand River St. N.	271 Grand River St. N	Subway	Food Services	Plaza	5,100	0.05	0.1	36%	16	114
Grand River St. N.	315 Grand River St. N	Sobeys	Food Store	Free-Standing	51,000	0.5	1.3	37%	100	78
Grand River St. N. - sub-Total, including commercial sites on designated Employment Area Lands					174,500	2	7	23%	339	49
Grand River St. N. - sub-Total, excluding commercial sites on designated Employment Area Lands					161,400	1.50	6	25%	314	52



Other

Node	Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
Dumfries St.	27 Dumfries St.	The Grand Bayou Cajun Kitcher	Food Services	Free-Standing	3,700	0.03	0.2	19%	3	17
Dumfries St.	28 Dumfries St.	KFC	Food Services	Free-Standing	2,000	0.02	0.1	31%	10	167
Dumfries St.	53 Dumfries St.	Vacant Building	Vacant		4,900	0.05	0.1	50%	0	0
Other	93 King Edward St	Gas Station	Automotive Sales & Services	Free-Standing	2,500	0.02	0.5	5%	2	4
Other	1105 Rest Acres Rd	Funeral Home	Other	Other	7,700	0.07	0.8	9%	10	13
Other	14 Market St.	Wrights Variety Store	Convenience Store	Free-Standing	4,000	0.04	0.2	22%	2	12
Other	32 Dundas St W	Little Paris Bread	Food Services	Storefront	2,000	0.02	0.1	25%	5	63
Other	3 Elm St	Restaurant & Office	Food Services	Office	15,000	0.10	0.3	34%	40	138
Other	7 Market St.	Titos Pizza	Food Services	Free-Standing	1,000	0.04	0.1	64%	5	86
Other	1 Grand River St. N	Wendy's General Store	Convenience Store	Free-Standing	3,300	0.03	0.0	77%	2	50
Other - sub-Total					46,100	0.42	2.20	19%	79	36
Rest Acres Rd.	1084 Rest Acres Rd	Cobblestone Pharmacy/Dental/N	Health Care	Plaza	40,800	0.38	1.5	26%	75	51
Rest Acres Rd.					40,800	0.38	1	26%	75	51
Total	Total Commercial Building Space, Sq.ft. (G.L.A.)				585,500	4.90	22	23%	1,170	54

Source: Watson & Associates Economists Ltd. Employment data derived from InfoCanada Business Directory.



Appendix F-2: Commercial Built-Space Inventory in St. George

Corridor	Largest Tenant of Building	G.L.A., Sq.ft.
Brant Rd.	Tim Hortons	2,600
Brant Rd.	Gas Station	1,000
Brant Rd.	Gas Station	1,000
Brant Rd.	Southern Pride Poultry	3,100
Brant Rd.	Ken's Auto	6,000
Brant Rd. sub-Total		13,700
Core	Foodland	12,000
Core	Esso Gas Station	1,000
Core	BMO Bank	2,500
Core	Auto Repair	3,600
Core	Car Wash	3,500
Core	Storefronts	9,700
Core	Storefronts	13,100
Core	2 Converted Houses	6,000
Core	41 Main St. Complex	5,000
Core	Plaza	11,000
Core	Plaza	4,300
Core	Plaza	4,500
Core sub-Total		76,200
Total St. George		89,900

Source: Watson & Associates Economists Ltd.

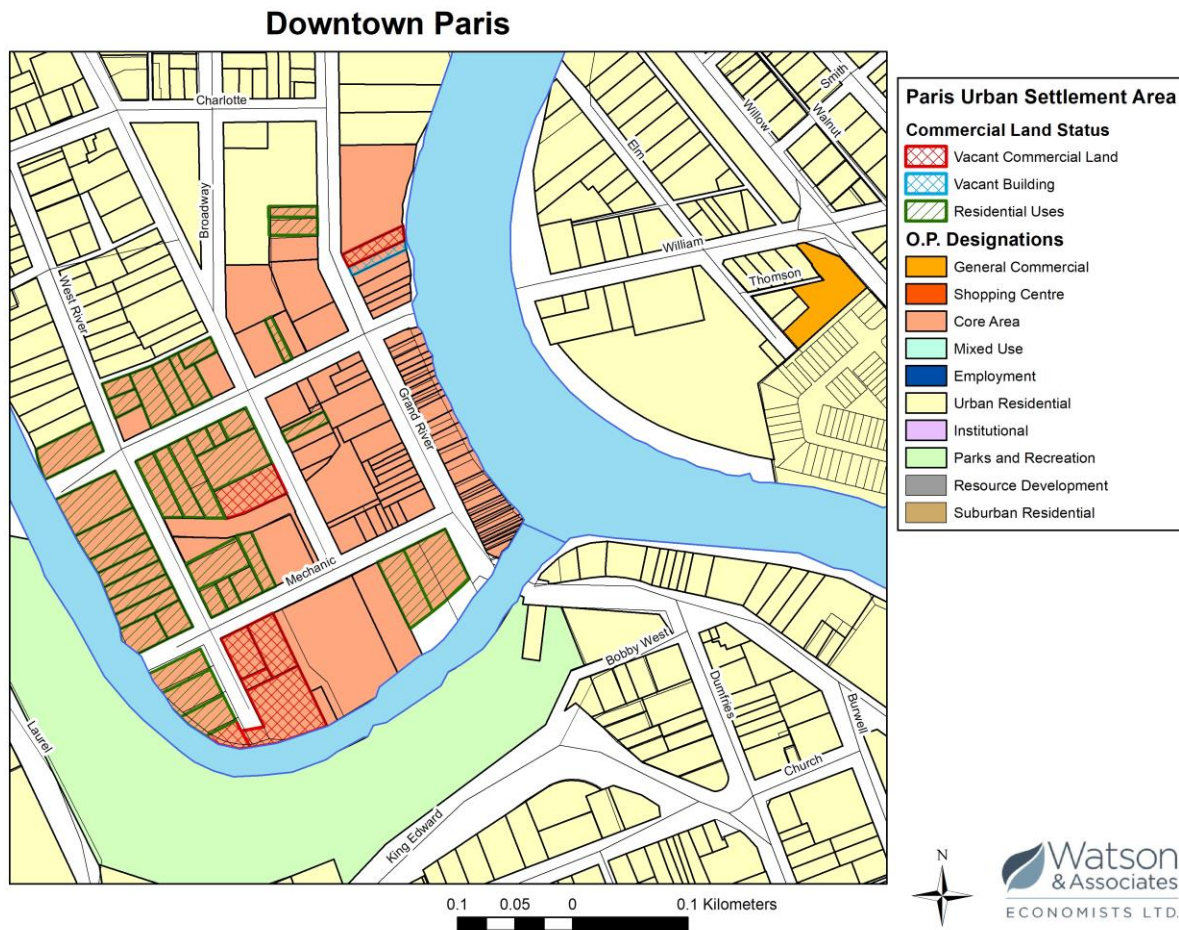


Appendix G

Designated Commercial Land Supply



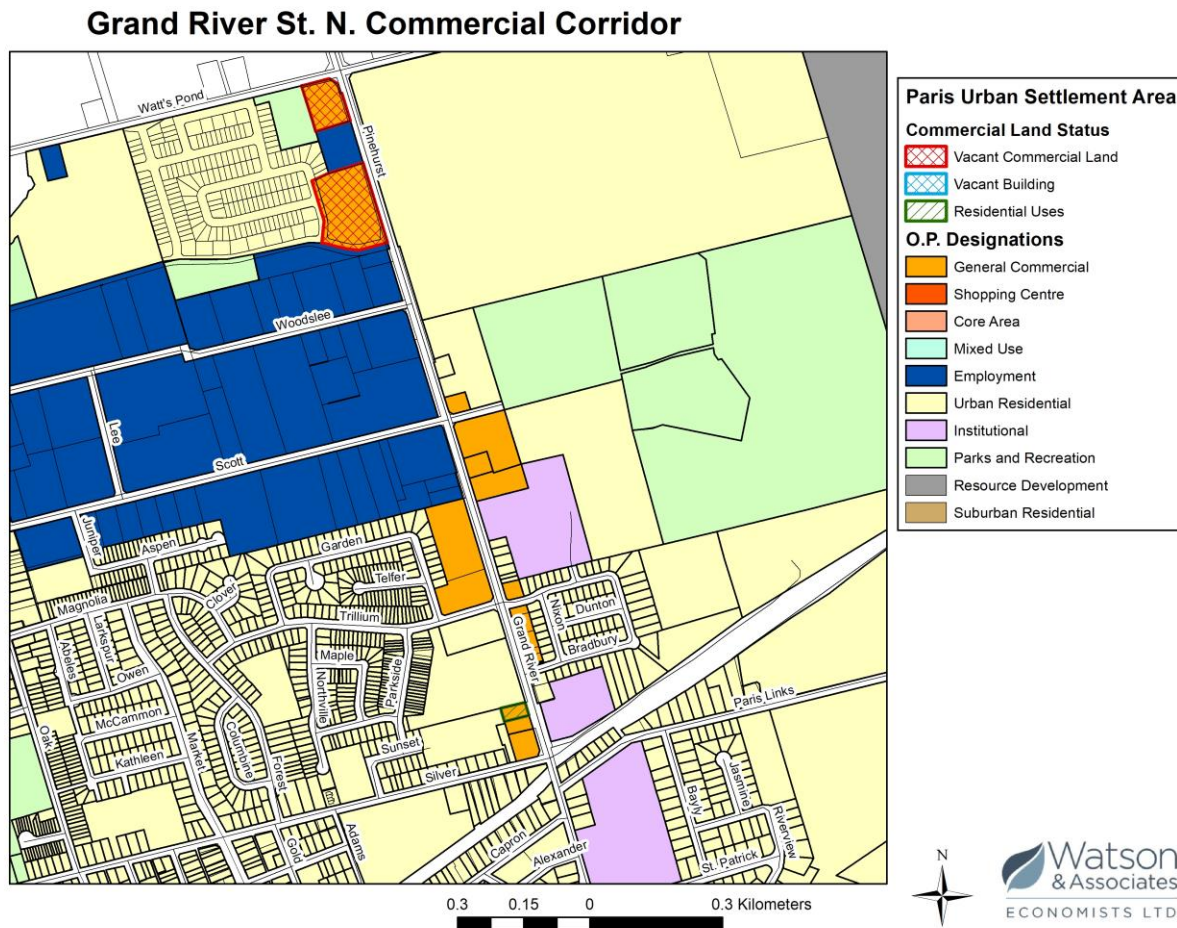
Appendix G-1: Designated Commercial Land Supply in Downtown Paris by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix G-2: Designated Commercial Land Supply in Grand River St. N. Corridor by Status

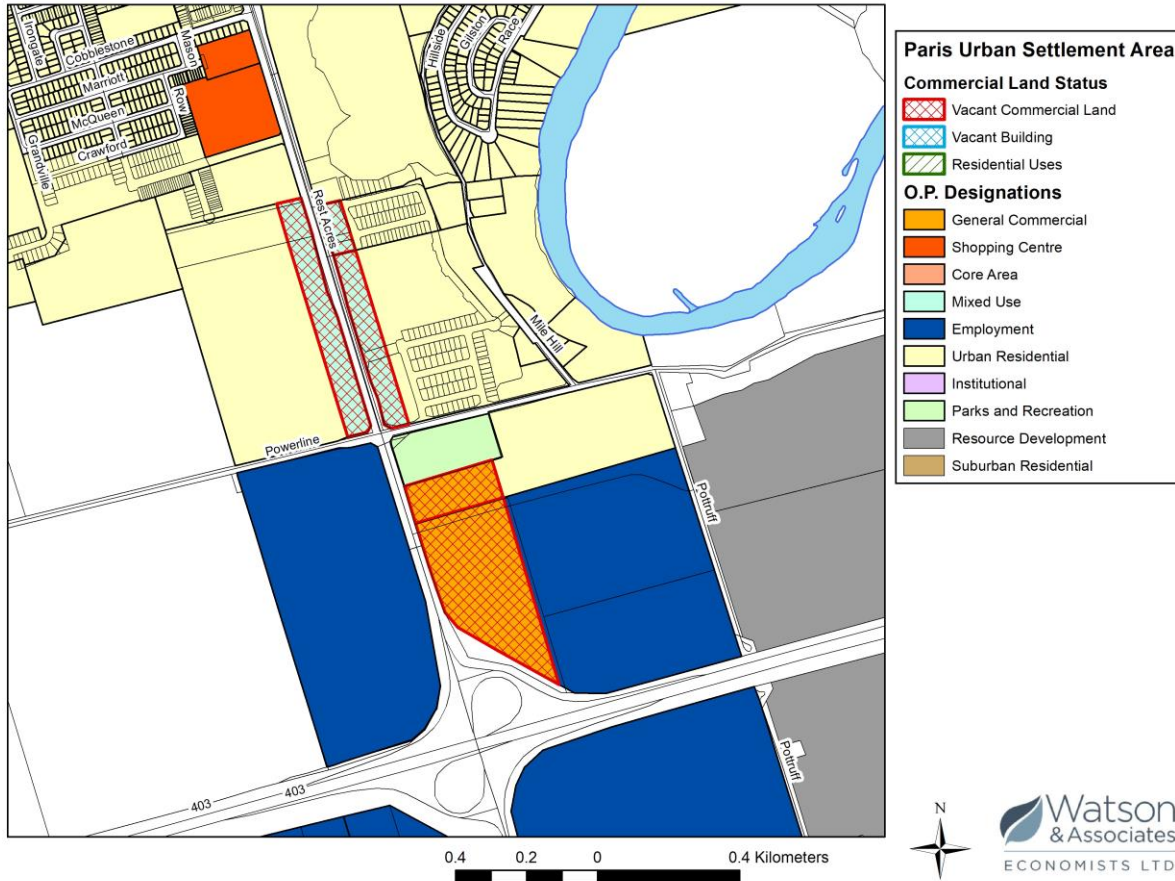


Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix G-3: Designated Commercial Land Supply in Rest Acres Road Corridor by Status

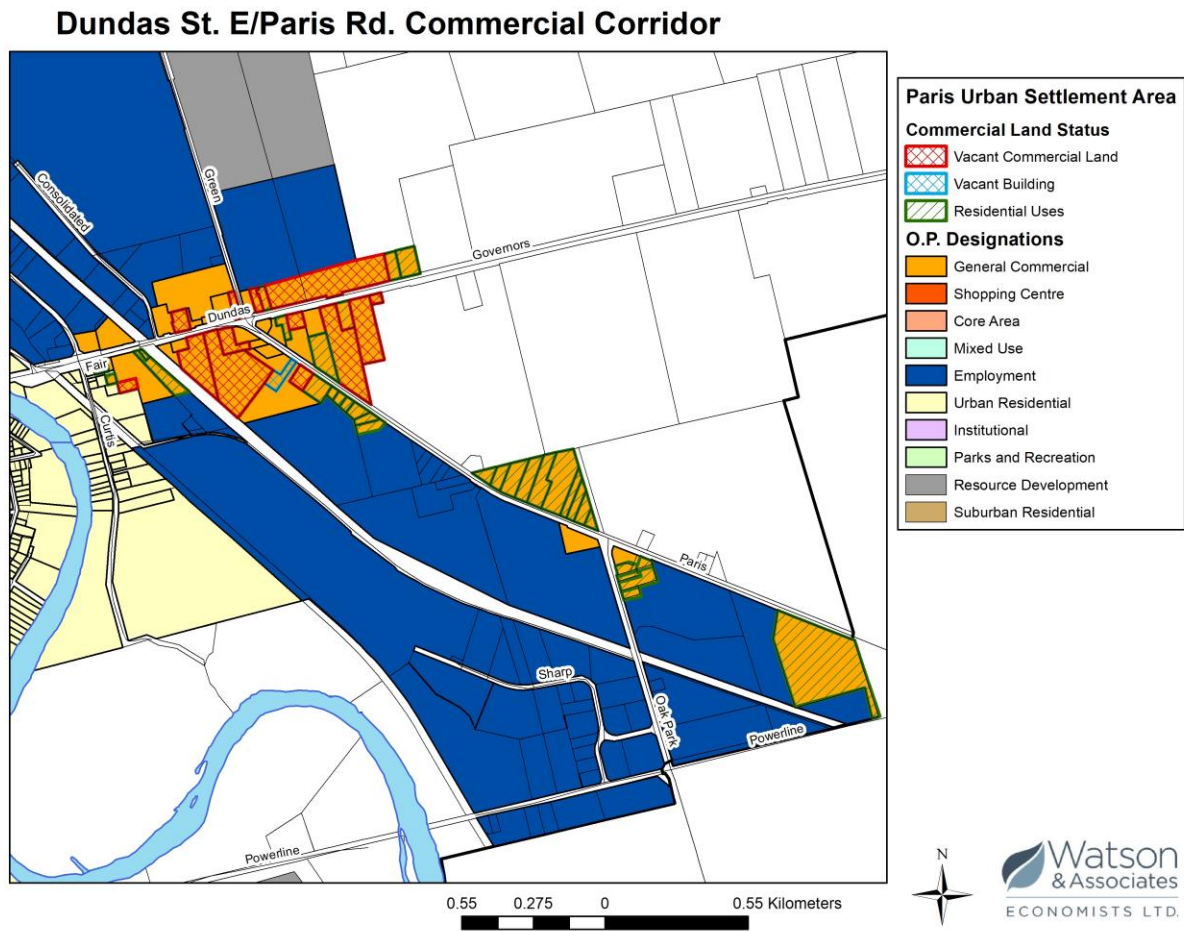
Rest Acres Rd. Commercial Corridor



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



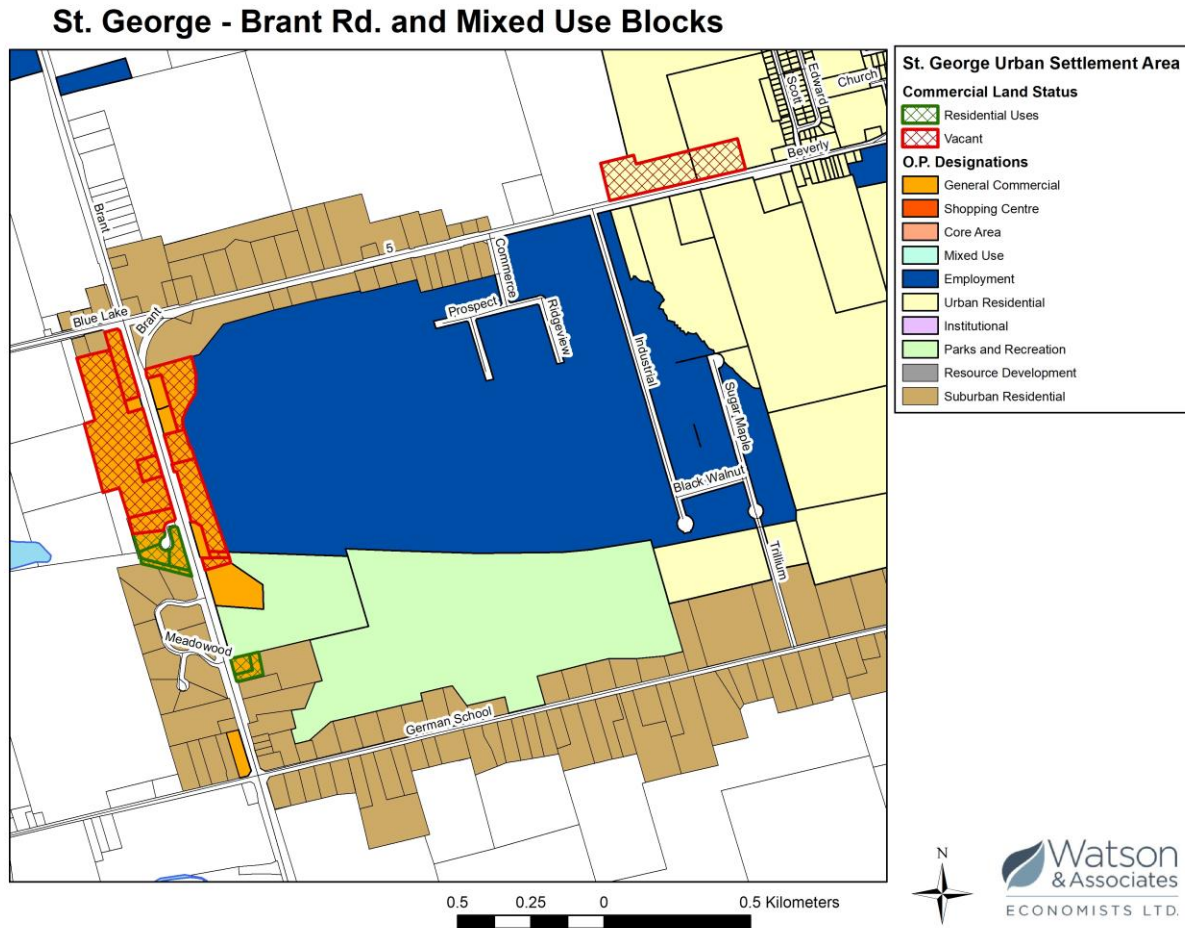
Appendix G-4: Designated Commercial Land Supply in Dundas Rd. and Paris Rd. Corridor by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



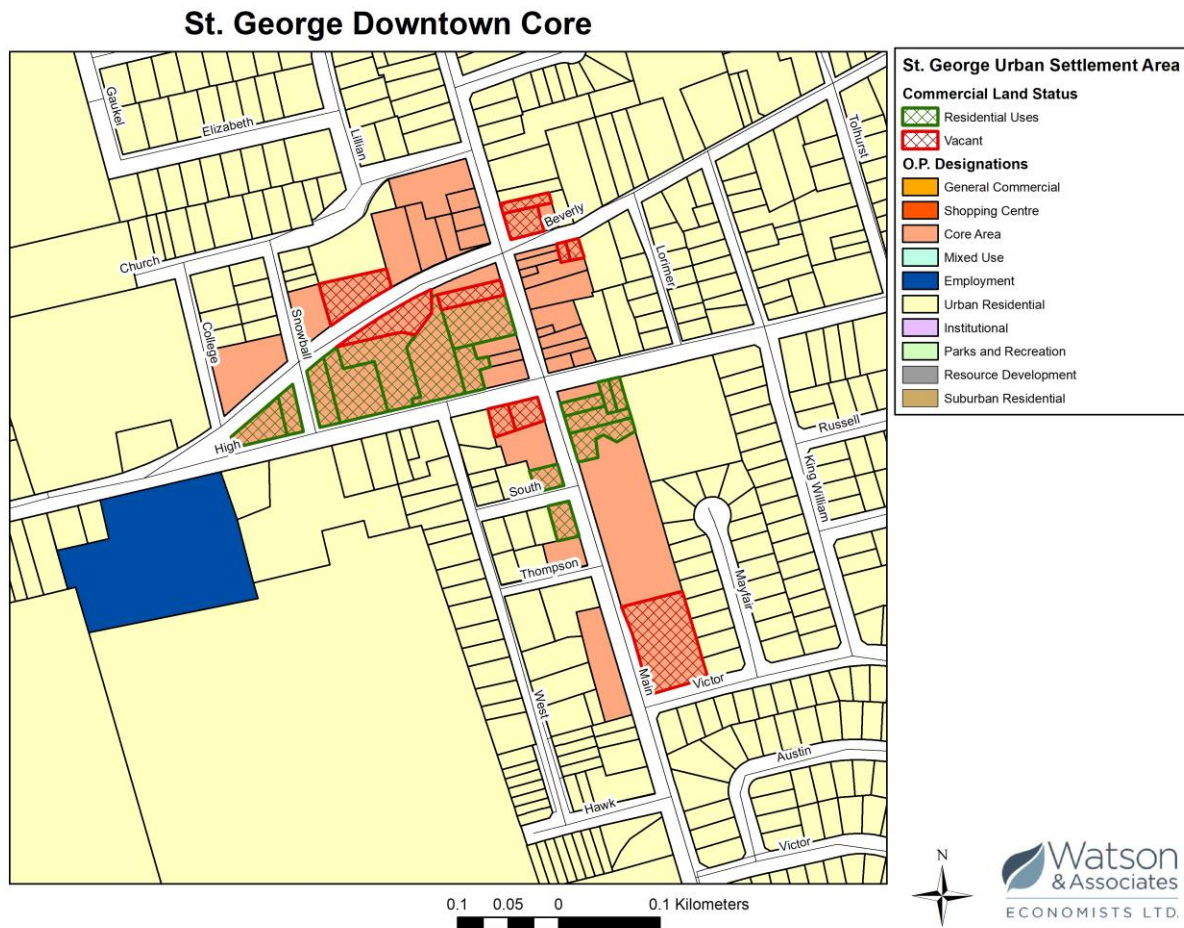
Appendix G-5: Designated Commercial Land Supply in Brant Road Corridor by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix G-6: Designated Commercial Land Supply in St. George Core by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



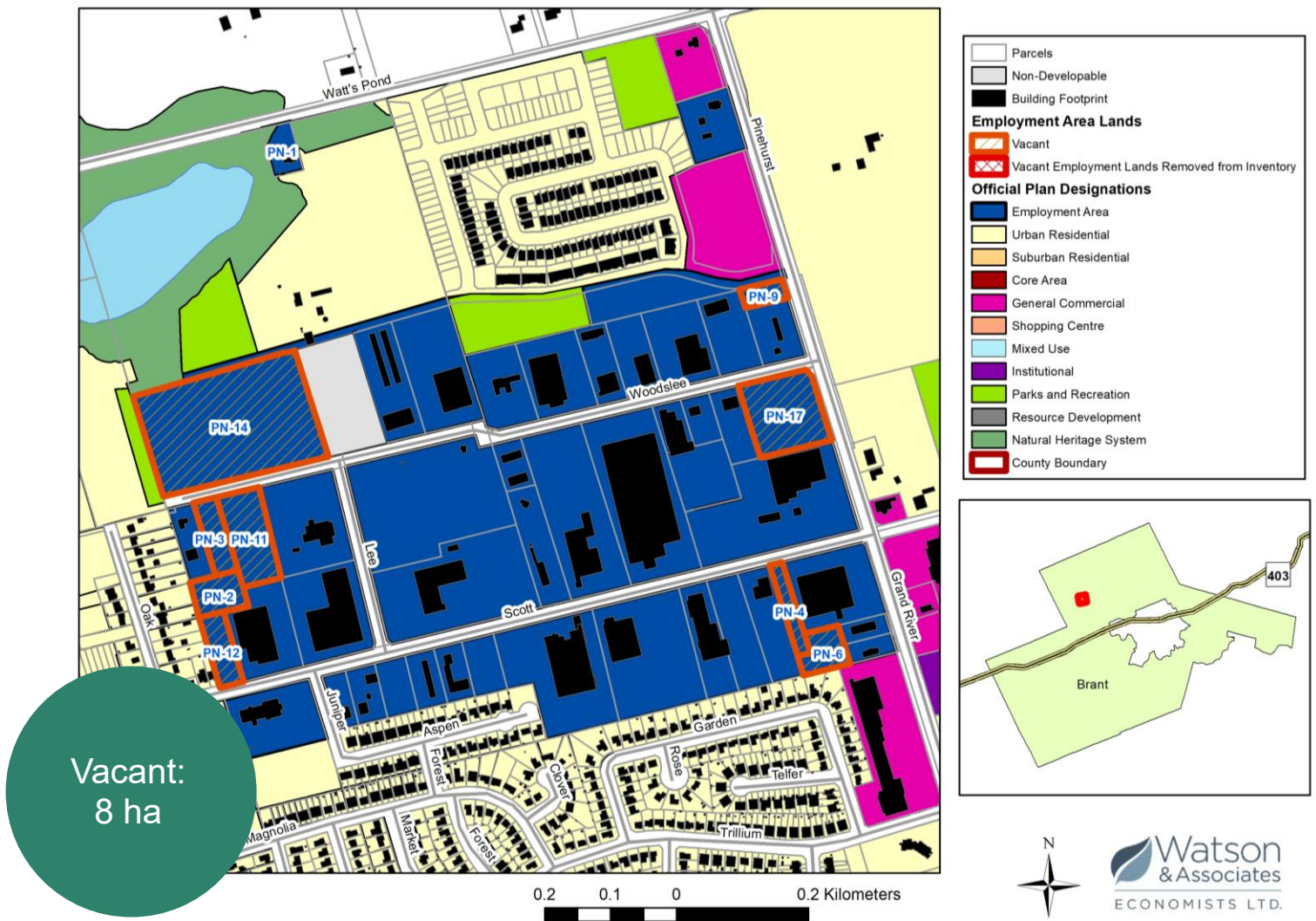
Appendix H

Urban Employment Area Developed and Vacant Land Supply



Appendix H: Employment Area Developed and Vacant Land Supply

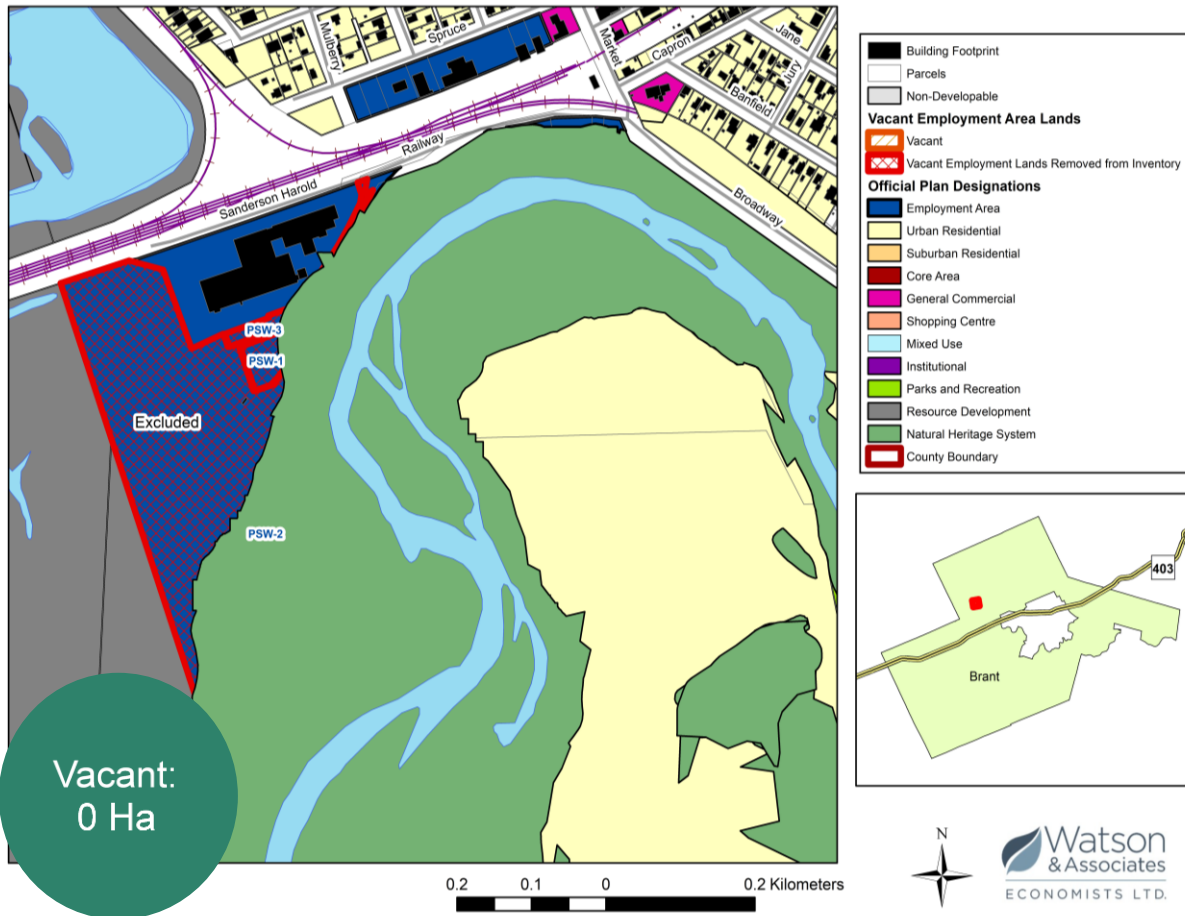
Figure H-1
Paris North Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



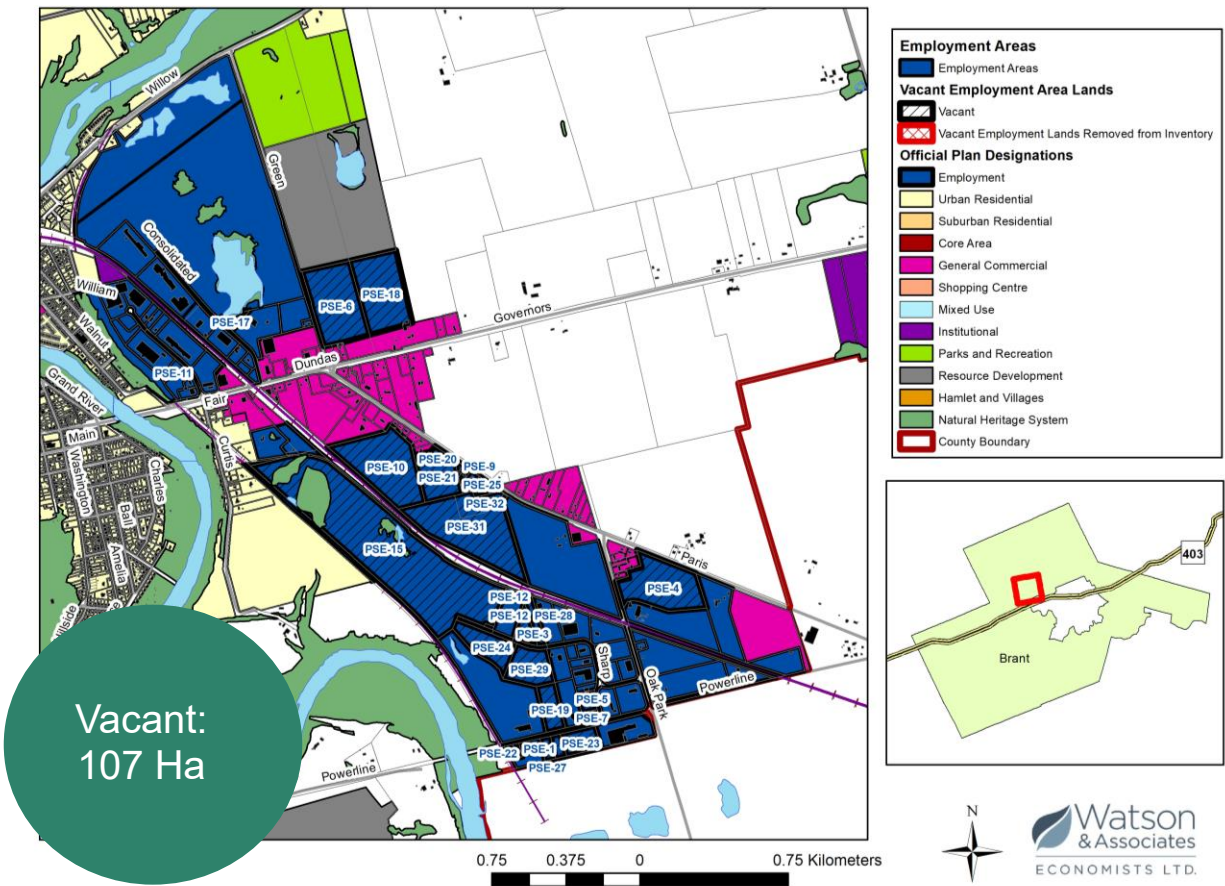
Figure H-2
Paris Southwest Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



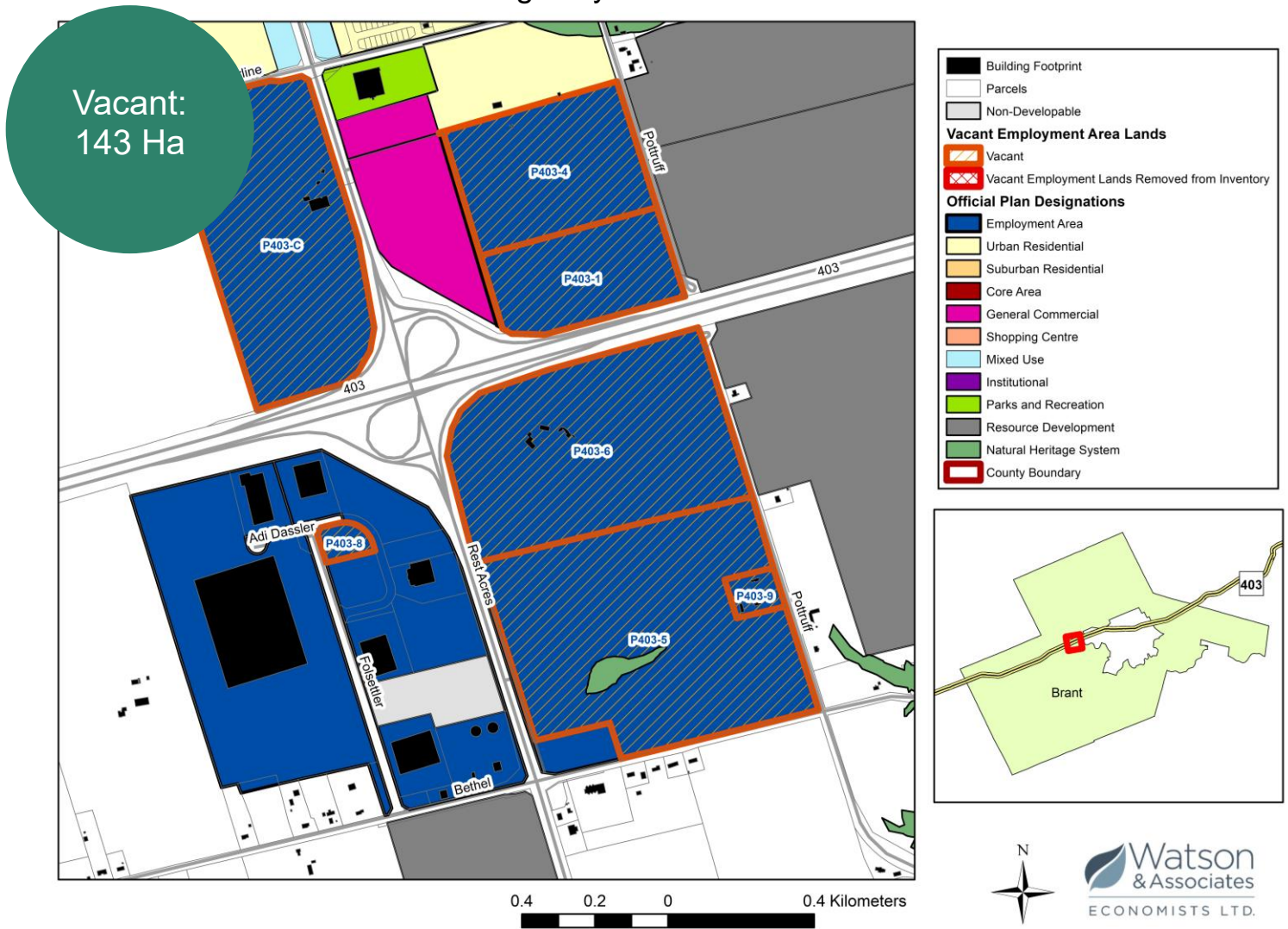
Figure H-3
Paris Southeast Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



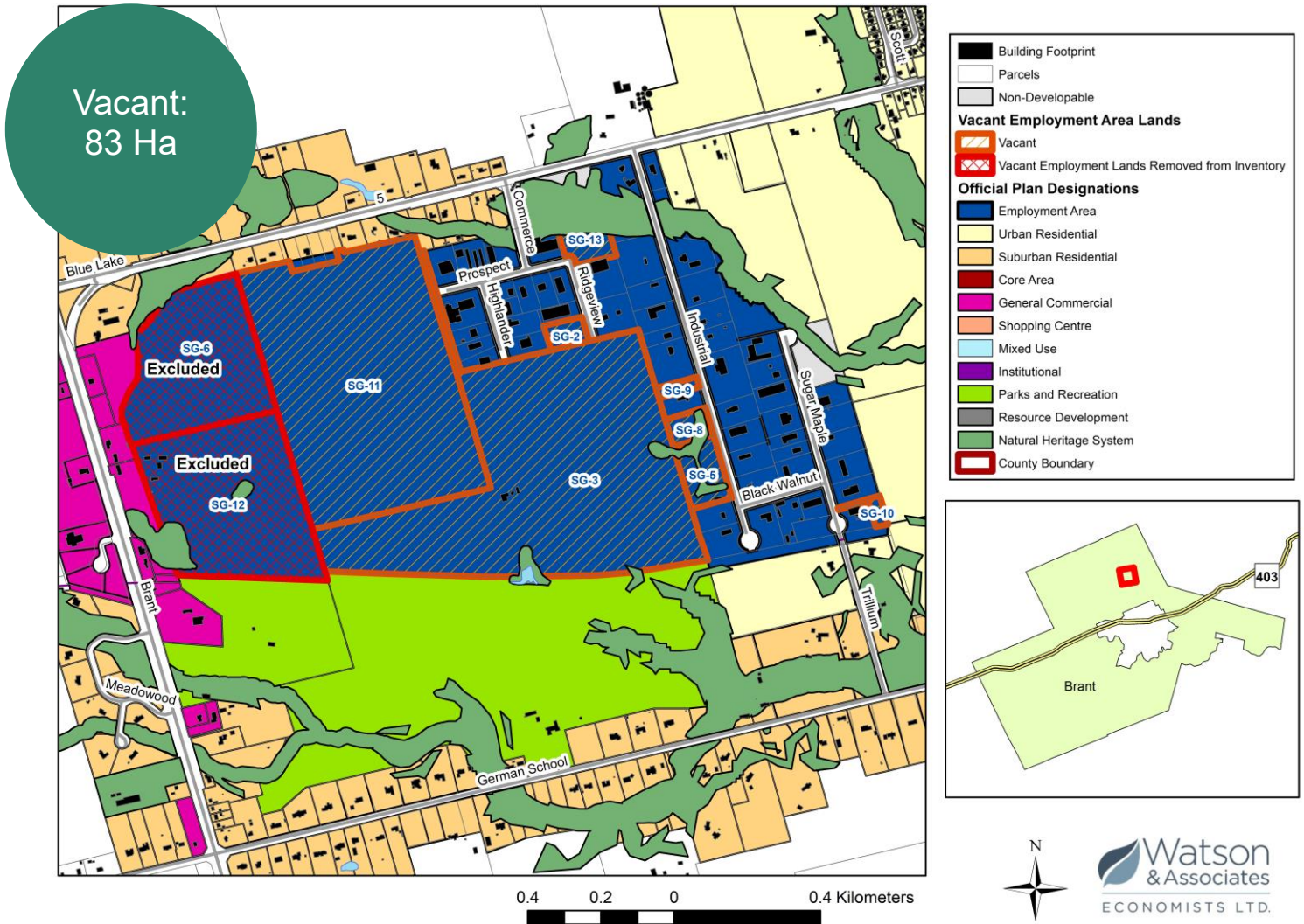
Figure H-4
Paris Highway 403 Business Park



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Figure H-5
St. George Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

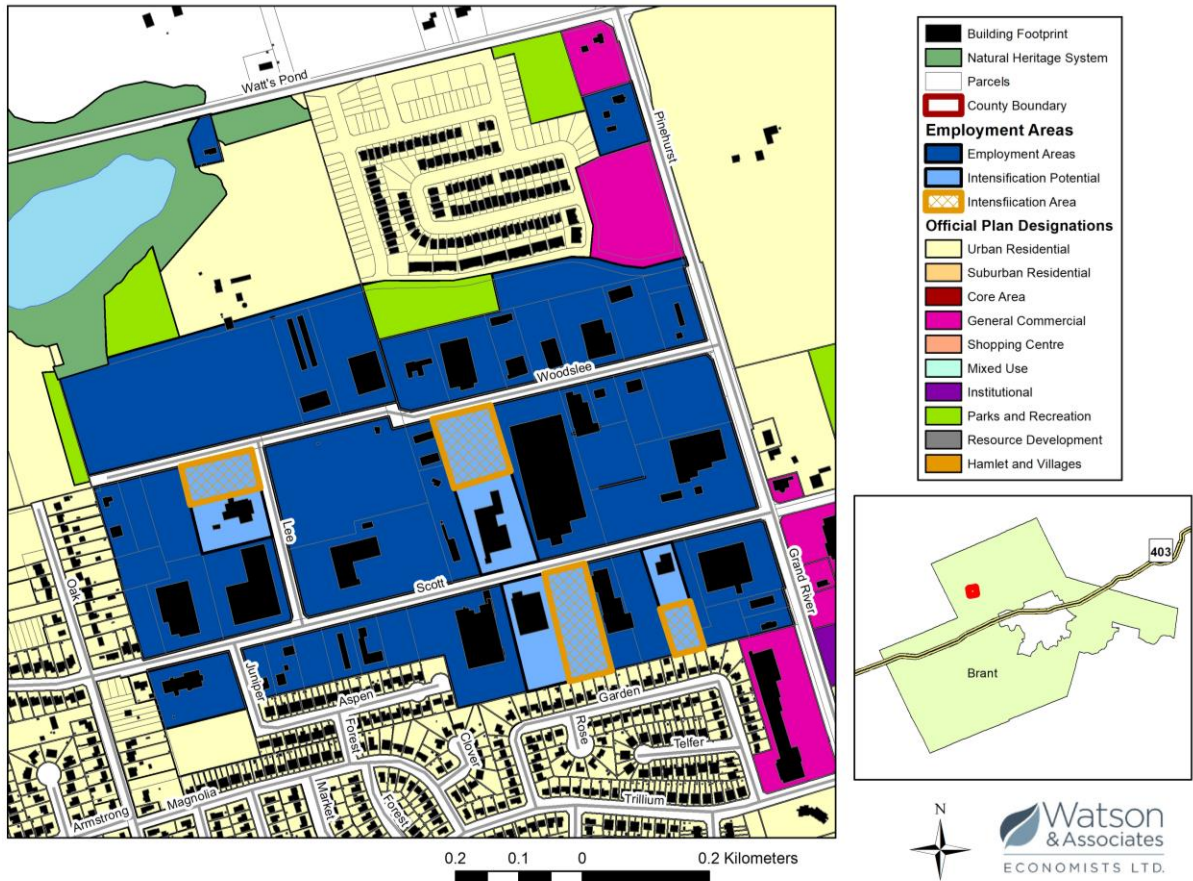


Appendix I

Employment Area Intensification Opportunities in Paris



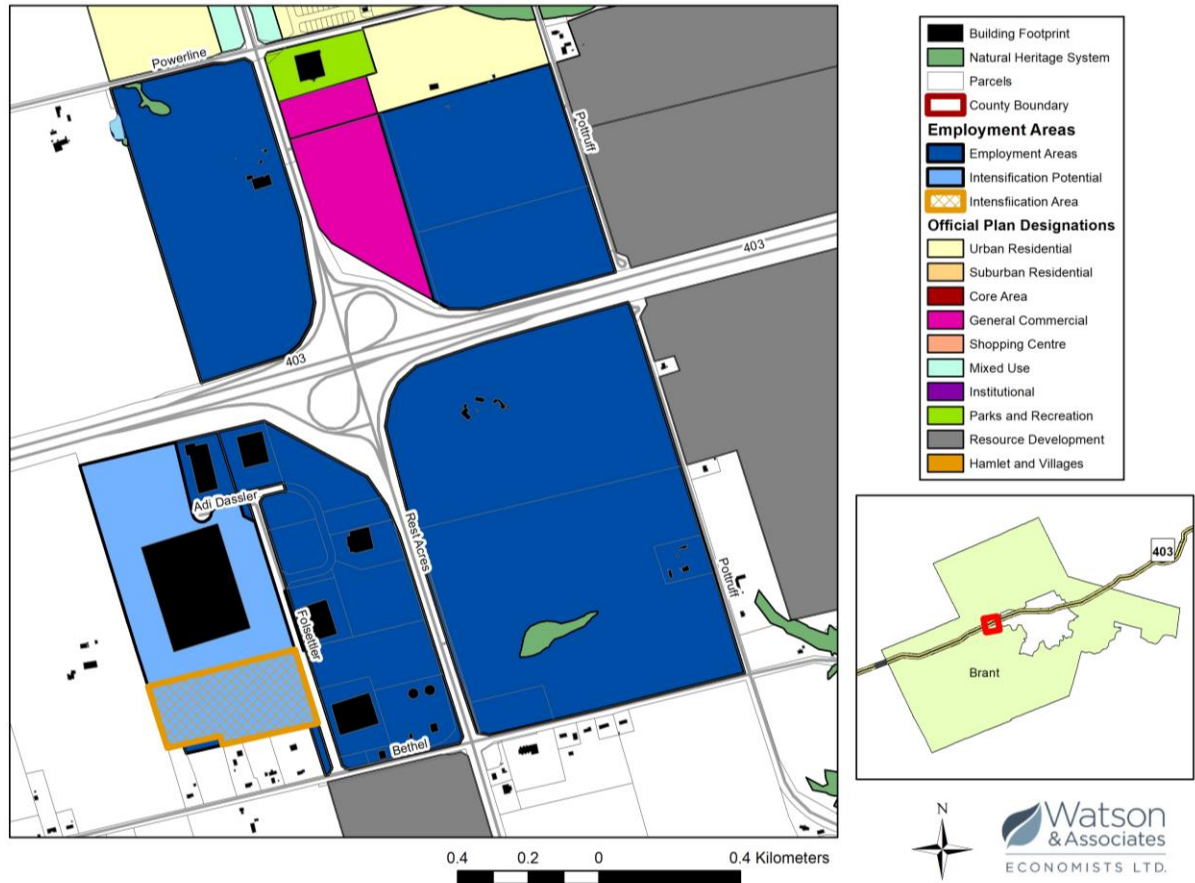
Appendix I-1: Employment Area Intensification Opportunities – North Paris Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



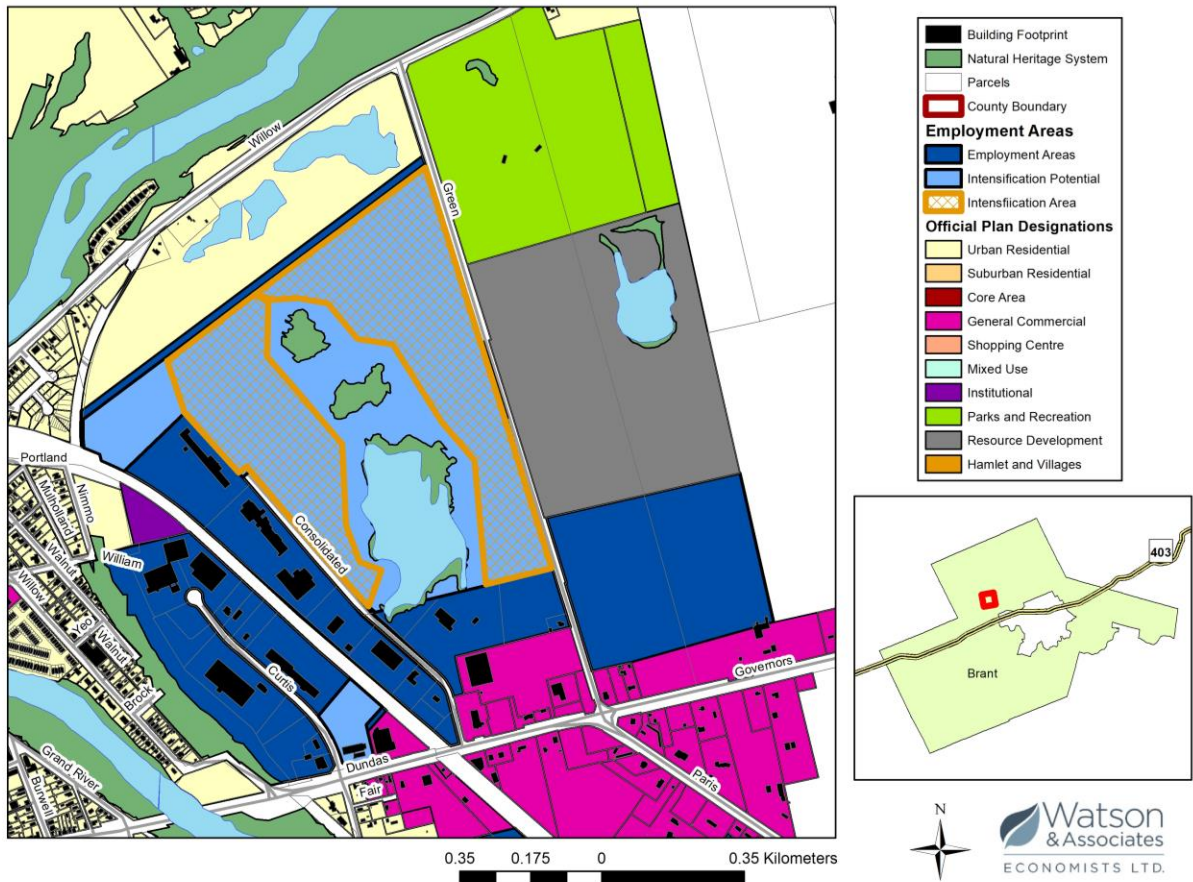
Appendix I-2: Employment Area Intensification Opportunities – Paris 403 Business Park



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



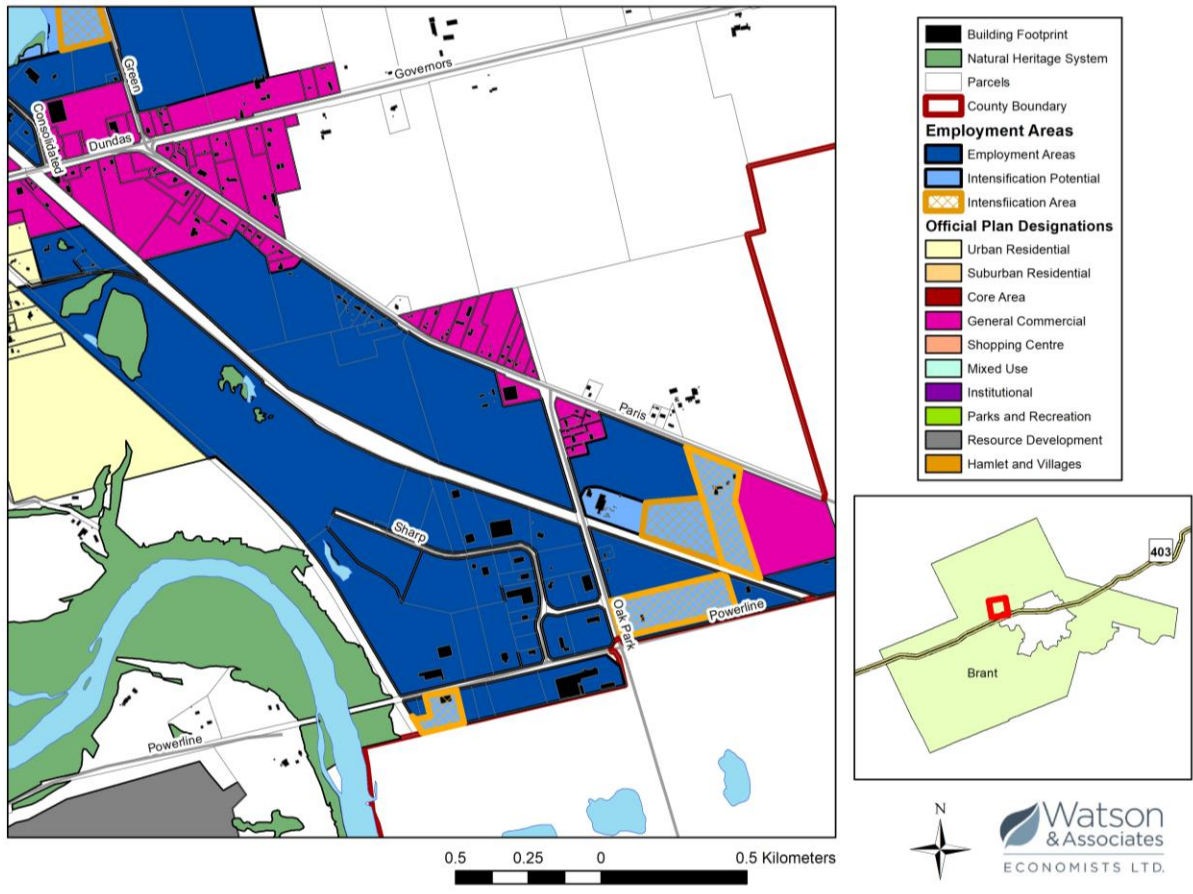
Appendix I-3: Employment Area Intensification Opportunities – Southeast Employment Area, North Portion



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix I-4: Employment Area Intensification Opportunities – Southeast Employment Area, South Portion



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



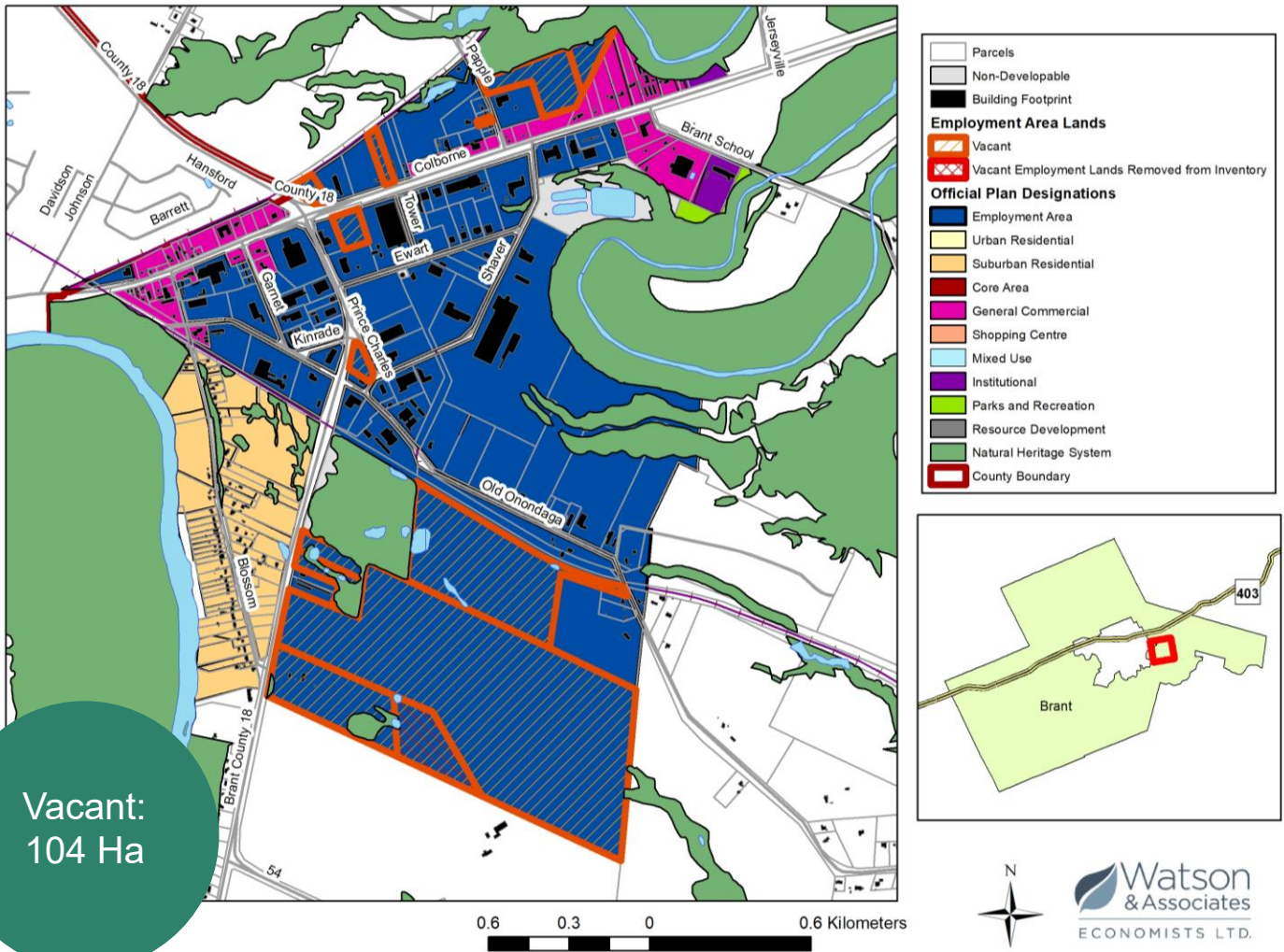
Appendix J

Rural Employment Area Developed and Vacant Land Supply



Appendix J: Rural Employment Area Developed and Vacant Land Supply

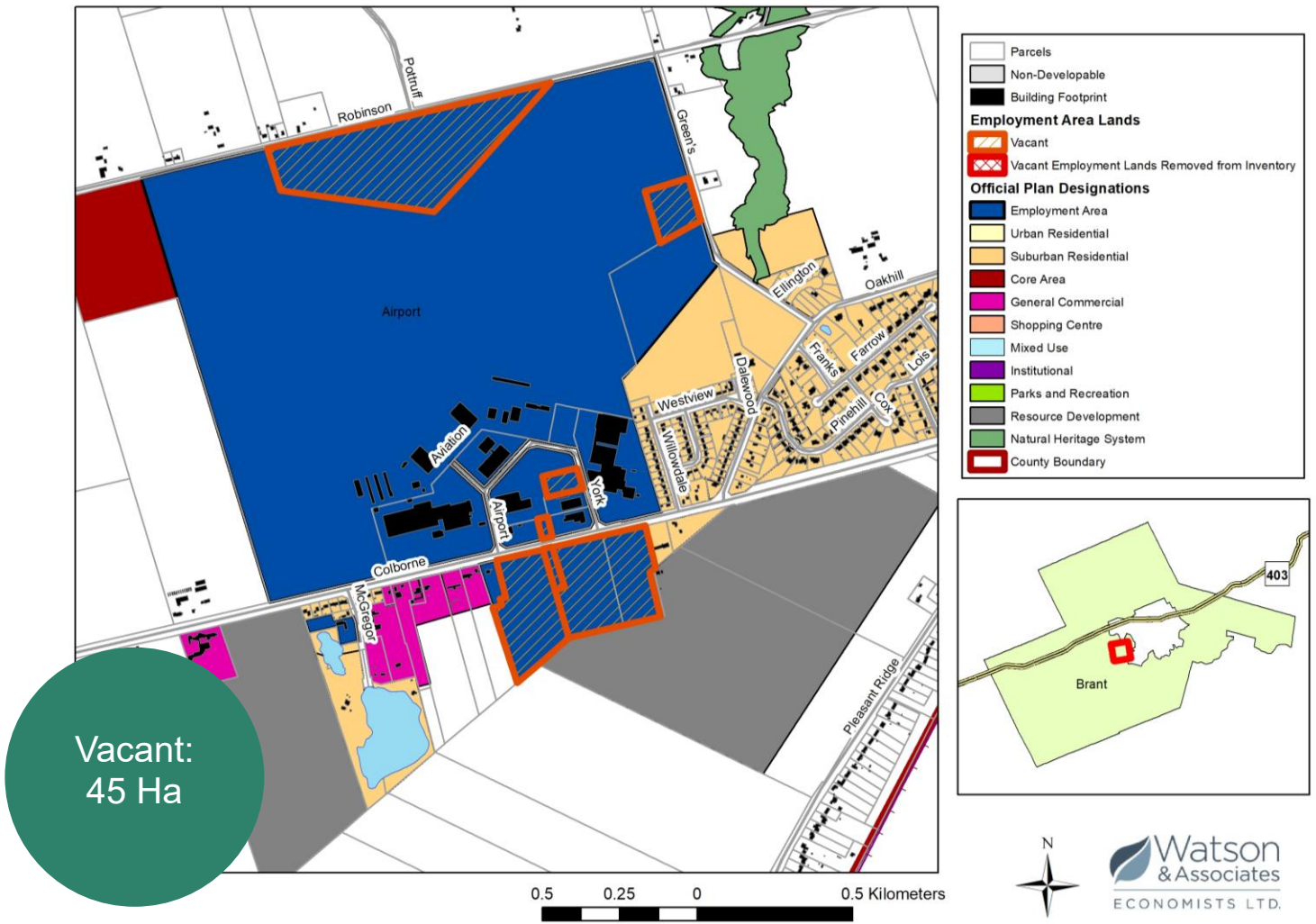
Figure J-1
Cainsville Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



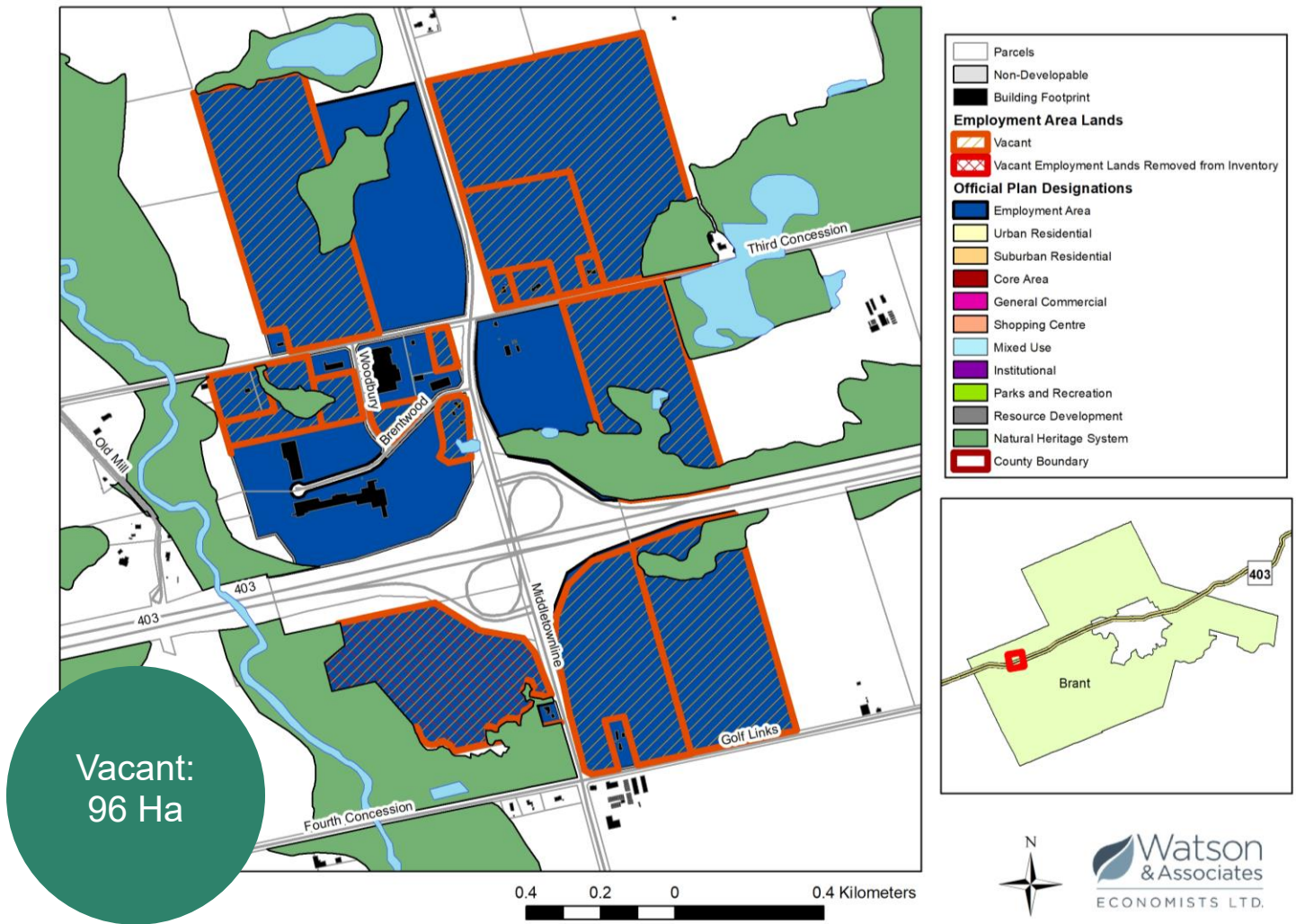
Figure J-2
Airport Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



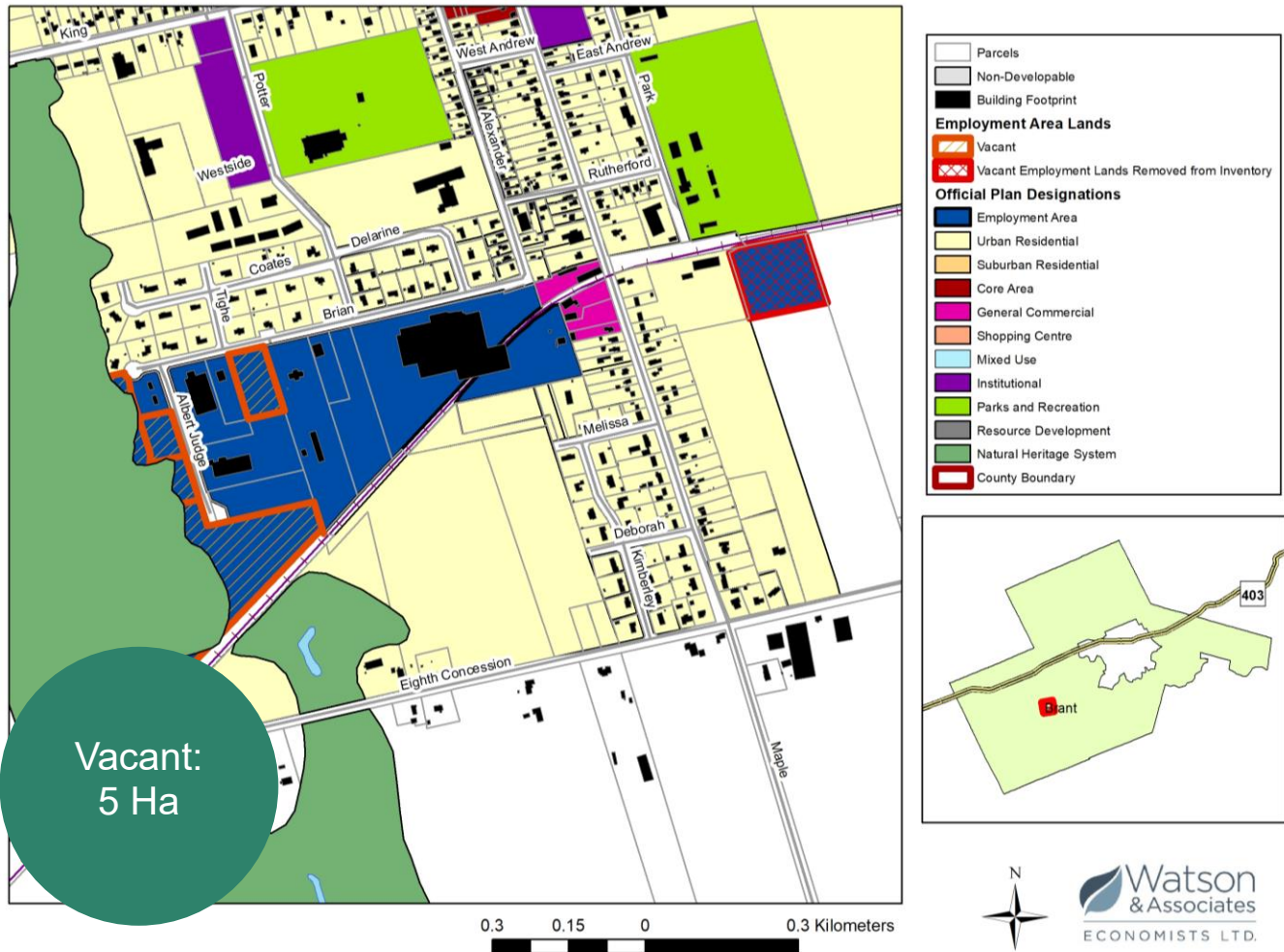
Figure J-3
Highway 25 and Highway 403 Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



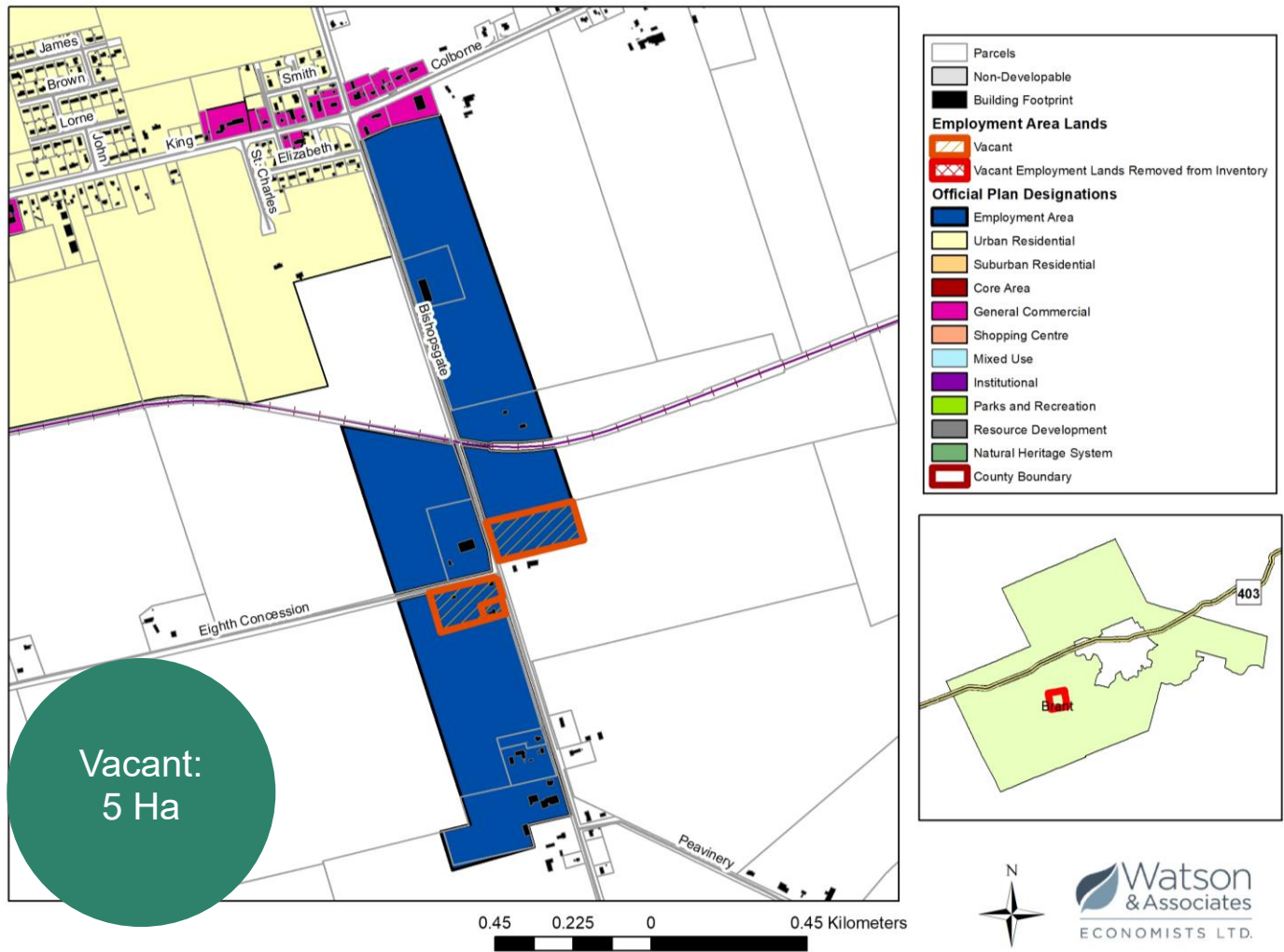
Figure J-4
Burford Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



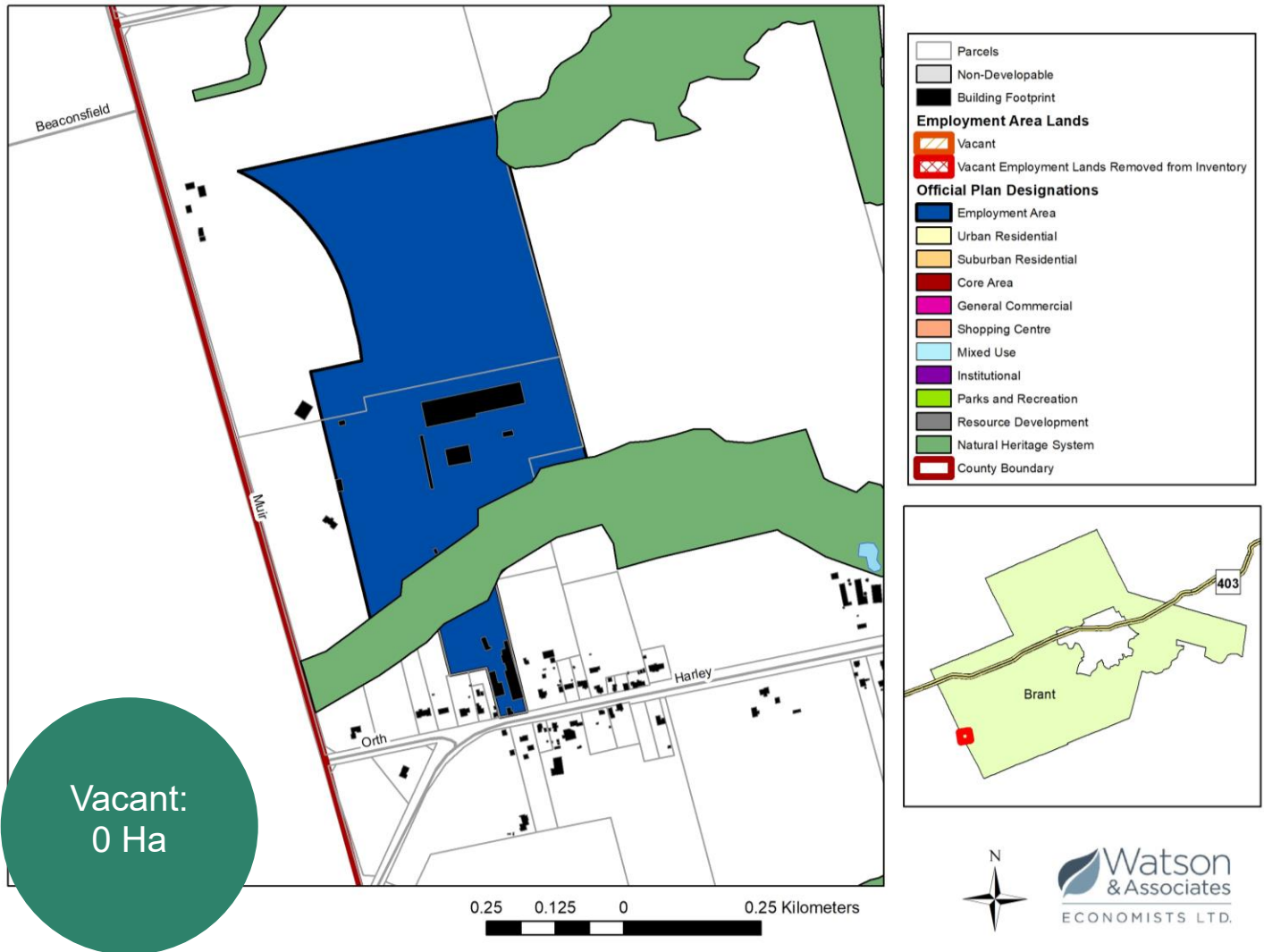
Figure J-5
Bishopsgate Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Figure J-6
New Durham Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix K Employment Area Conversion Evaluations



Appendix K: 67 Woodslee Ave., Paris North Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
5	The site is located outside or on the fringe of an assembly of Employment Areas.	✗
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	✗
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	✓
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	✗
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	✗
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	✗
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

#	
✓	4
✗	4
Suggest <u>not</u> to convert.	



Appendix K-2: 326 Grand River St. N, Paris North Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
5	The site is located outside or on the fringe of an assembly of Employment Areas.	✗
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	✗
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	✗
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	✗
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	✗
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	✗
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

#	
✓	3
✗	5
Suggest <u>not</u> to convert.	



Appendix K-3: Sharp Road, Paris Southeast Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
5	The site is located outside or on the fringe of an assembly of Employment Areas.	x
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	x
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	x
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	x
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	x
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	x
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	Yes

#	
✓	1
x	8
Suggest <u>not</u> to convert.	



Appendix K-4: Site 4a and 4b: Cainsville

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
5	The site is located outside or on the fringe of an assembly of Employment Areas.	x
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	x
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	x
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	x
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	x
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	x
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	x
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

	#
✓	0
x	10
Suggest <u>not</u> to convert.	



Appendix L

S.A.B.E. Evaluation Matrix



Appendix L: Site 1

Site 1: 403 Highway and Pottruff Road Rd., NE

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible			P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?			10% to 25%		APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site	APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?		Separated by Arterial			Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?			Moderate Opportunity		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 2

Site 2: 211 Pottruff Road Rd., NE

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact	APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?			Feasible	P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact	APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)			Modest Impact	APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?			10% to 25%	APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered	P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship	
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1	
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture				APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact				Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback				APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact				P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?		Separated by Arterial			Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)		Minimal Impact			Local Criteria
	Does it offer a good transition from new to existing development?			Moderate Opportunity		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 3

Site 3: 169 Pottruff Road & 21 Bethel Road

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?			Adjacent to Site		APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?				Low Opportunity	Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 4

Site 4: 822 Rest Acres Road

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?				Low Feasibility	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS				APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site	APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?		Adjacent to site buffered			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)				High Impact	Local Criteria
	Does it offer a good transition from new to existing development?				Low Opportunity	APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 5

Site 5 – Bethel Road Lands (5 sites)

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?			Adjacent to Site		APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?				Low Opportunity	Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 6

Site 6 – 143 Bethel Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?		Highly Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact	APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible		P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?		Actively used for agriculture, Class 4 to 7		P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)		Low level of agriculture activity (mixed: crops/ & or livestock)		APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 7

Site 7 – Bethel Rd./Clever Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible		P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%		APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?			Actively used for agriculture, Class 4 to 7	P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)		Low level of agriculture activity (mixed: crops/ & or livestock)		APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 8

Site 8: 1034 Powerline Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?		Highly Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available			P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Minimal Impact			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)			Modest Impact		Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8

Appendix L: Site 9

Site 9: 989 Powerline



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?	Available				APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact			APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)	Negligible Impact				APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS				APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No				APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No				P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Municipal Comprehensive Review

County of Brant

Final Report

Date: July 26, 2021

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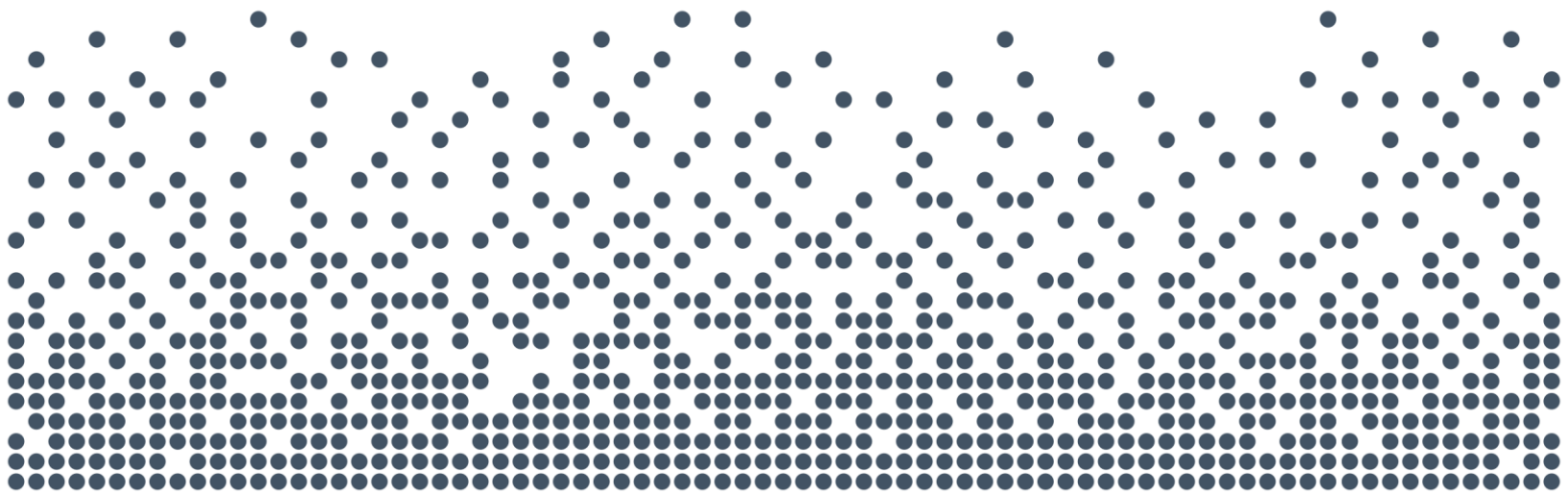
List of Acronyms and Abbreviations

A.I.A.	Agriculture Impact Assessment
A.P.T.G.	A Place to Grow
A.R.U.	Additional Residential Unit
B.U.A.	Built-up Area
D.G.A.	Designated Greenfield Area
E.L.E.	Employment Lands Employment
G.D.P.	Gross Domestic Product
G.F.A.	Gross Floor Area
G.G.H.	Greater Golden Horseshoe
G.L.A.	Gross Leasable Area
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.N.A.	Land Needs Assessment
M.D.S.	Minimum Distance Separation
M.M.A.H.	Ministry of Municipal Affairs and Housing
M.C.R.	Municipal Comprehensive Review
N.A.I.C.S.	North American Classification System



List of Acronyms and Abbreviations (Cont'd)

N.F.P.O.W.	No Fixed Place of Work
O.P.	Official Plan
P.P.S.	Provincial Policy Statement
P.P.U.	Persons Per Unit
P.R.E.	Population-Related Employment
S.A.B.E.	Settlement Area Boundary Expansion



Executive Summary



Executive Summary

The O.P. is a long-range document that is designed to manage planned change and the physical development of the County over a long-term planning horizon. The County of Brant is currently preparing to revise its O.P. to describe the type of growth the community wants and where that growth should occur over the next 30 years. The process of preparing revisions to the County's O.P. represents an M.C.R., in accordance with section 26 of the Planning Act. This process is required to bring the County's O.P. into conformity with the Growth Plan, 2019 (as amended), as well as to reflect current provincial policy direction and the County's strategic initiatives. Integral to the County's O.P. is a comprehensive review of how new development will be planned, phased, and accommodated to the year 2051. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development.

Key components of this M.C.R. report include:

- A review of the Urban and Rural Systems, including settlement hierarchy;
- Long-term population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by urban and rural area, as well as by urban settlement area;
- An analysis of urban Community Area land needs (to accommodate residential and population-related employment);
- An analysis of urban Employment Area land needs (to accommodate primarily export-based or industrial-type employment);
- An analysis of Employment Area conversion requests;
- A review of Settlement Area Boundary (S.A.B.E.) requests base; and
- Conclusions and recommendations related to the County's urban land needs, Employment Area Conversions and S.A.B.E., as well identifying next steps.

County of Brant Urban and Rural System

The County of Brant includes a blend of urban and rural communities. The Rural System includes lands that are protected from large-scale urban development. A key objective of the Rural System is to protect agriculture land, resources and the natural environment, while encouraging economic and cultural activities that support the health and prosperity of rural communities. A key objective of the Urban System is to direct



growth where there is planned and existing infrastructure in a manner that supports principles of complete communities. Complete communities include a diverse mix of land uses that provide opportunities to live, shop and work in the same community.

The Growth Plan, 2019 requires the majority of the forecast growth to be allocated to the areas with servicing (water/wastewater), i.e., Primary Settlement Areas (Growth Centres)¹ in the County's new Draft O.P. While Secondary Settlement Areas (new County Draft O.P.)² have only partial servicing and limited municipal servicing (some cases servicing studies are pending) are classified as part of the Urban System in the County's new O.P., recognizing the development character of the settlement area. For the purposes of the M.C.R. Report, Secondary Settlement Areas are grouped within the Rural System in accordance with the provincial L.N.A. The Secondary Settlement Areas are anticipated to accommodate some growth based on existing servicing capacity and subject to further servicing review. In terms of a hierarchy these areas are considered a higher priority for growth than the villages and hamlets³ and remaining rural area. The urban land needs assessment is based on fully-serviced lands within the Primary Settlement Area and includes Paris and St. George.

Paris and St. George, settlement areas are proposed as Primary Settlement Areas (Growth Centres) in accordance with the provincial Urban Settlement Area policies. These settlement areas provide full services, a delineated B.U.A., a concentration of public facilities and a range of land-uses. These Primary Settlement Areas (Growth Centres) are to comprise the only settlements within the Urban System.

Figure ES-1 provides an illustration of the proposed Urban System structure.

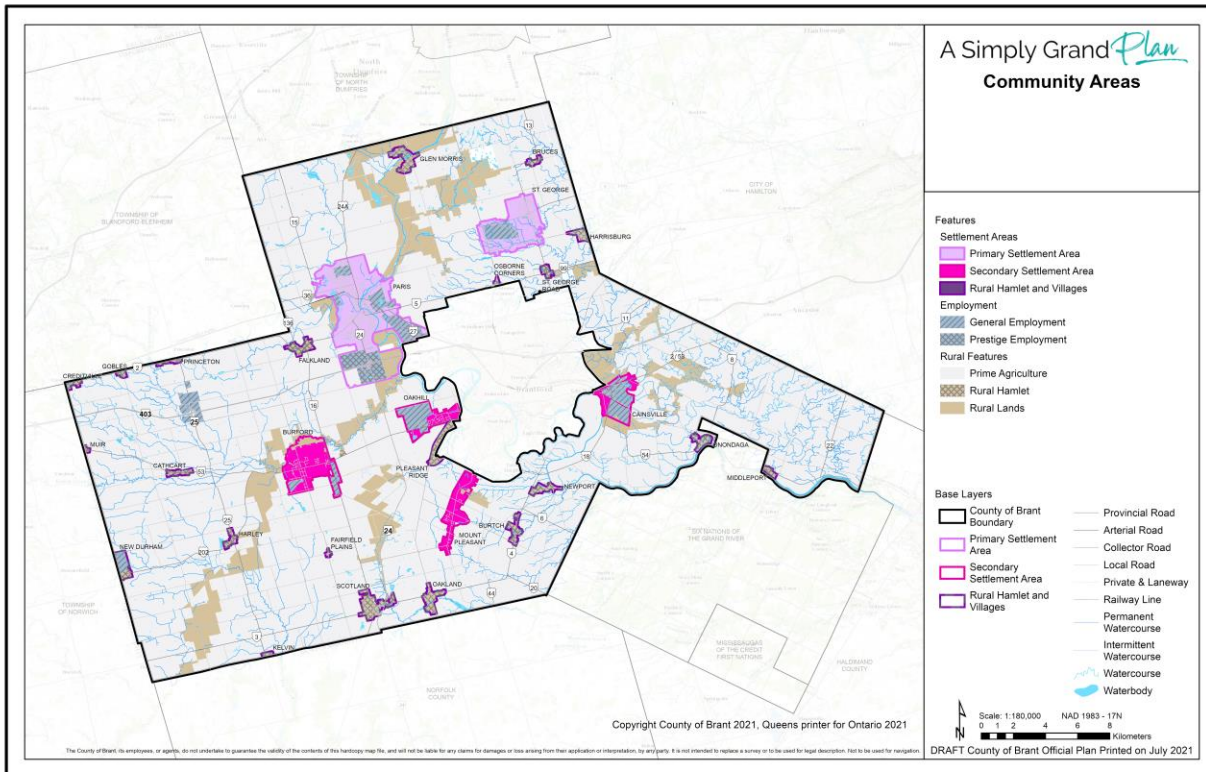
¹ Primary Settlement Areas include Paris and St. George as identified in Figure ES-1 in light purple outline.

² Secondary Settlement Areas include Cainsville, Burford, Mount Pleasant and Oakhill, as identified in Figure ES-1 in dark pink outline.

³ Villages and Hamlets include the several small settlement areas across the County. Examples of some of the village and hamlets include Glen Morris, Scotland, Oakland, New Durham and Harley, as identified in Figure ES-1 in dark purple outline.



Figure ES-1
County of Brant
Proposed Urban and Rural System



Source: County of Brant, Draft New O.P.

County of Brant Population Growth Outlook to 2051

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 economy within the County and the surrounding region – which in this case is largely represented by the G.G.H. The G.G.H. represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents a portion of the commuter-shed for the County of Brant. Potential employment opportunities within the County and the surrounding commuter-shed represent the primary driver of net migration to this area.

The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of approximately 5.3 million people (153,000 annually), or 1.3% annually between 2016 and 2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase



from 4.6 million in 2016 to 7.0 million in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051.

The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The industrial and office commercial real estate markets within the G.G.H. 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 G.G.H. is highly attractive on an international level to new businesses and investors. The G.G.H. 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 the G.G.H., largely driven by international and inter-provincial net migration to this region.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. As illustrated in Figure ES-2, due to its geographic location within the western region of the G.G.H. Outer Ring, the County of Brant is forecast to experience significant outward growth pressure over the next several decades largely from the western and northern Greater Toronto and Hamilton Area (G.T.H.A.) upper-tier municipalities, which have historically been amongst the fastest growing municipalities in Ontario in recent decades.

The County's "small town" urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. For the County of Brant, the coronavirus disease (COVID-19) pandemic has acted as a near-term driver of housing demand, 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 the County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in the County of Brant over the long term.



Over the past two decades, the County has experienced steady employment growth across a broad range of sectors including manufacturing, construction, retail, transportation and warehousing, agriculture, and tourism. The County's employment base is also highly concentrated in the creative class economy, including people engaged in arts and culture, such as artists, actors, performers, writers and designers. The economic base is also highly oriented towards small businesses and home-based occupations. To varying degrees, the County's established employment sectors are all anticipated to experience employment growth consistent with the relatively strong long-term economic outlook for the broader economy.

As the employment base continues to grow within the County and the surrounding commuter-shed, the economy is also anticipated to diversify, generating a range of new live/work and commuting opportunities that increasingly focus on emerging knowledge-based employment sectors related to professional, technical and scientific services, other business services, health care and education and information technology.

As the local employment base and economy within the surrounding commuter-shed continue to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population growth across the County. Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated in neighbouring municipalities within the G.G.H. Raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy is recommended as a key long-term economic development strategy for the County.



Figure ES-2
G.G.H.
County of Brant within the Context of the G.G.H.

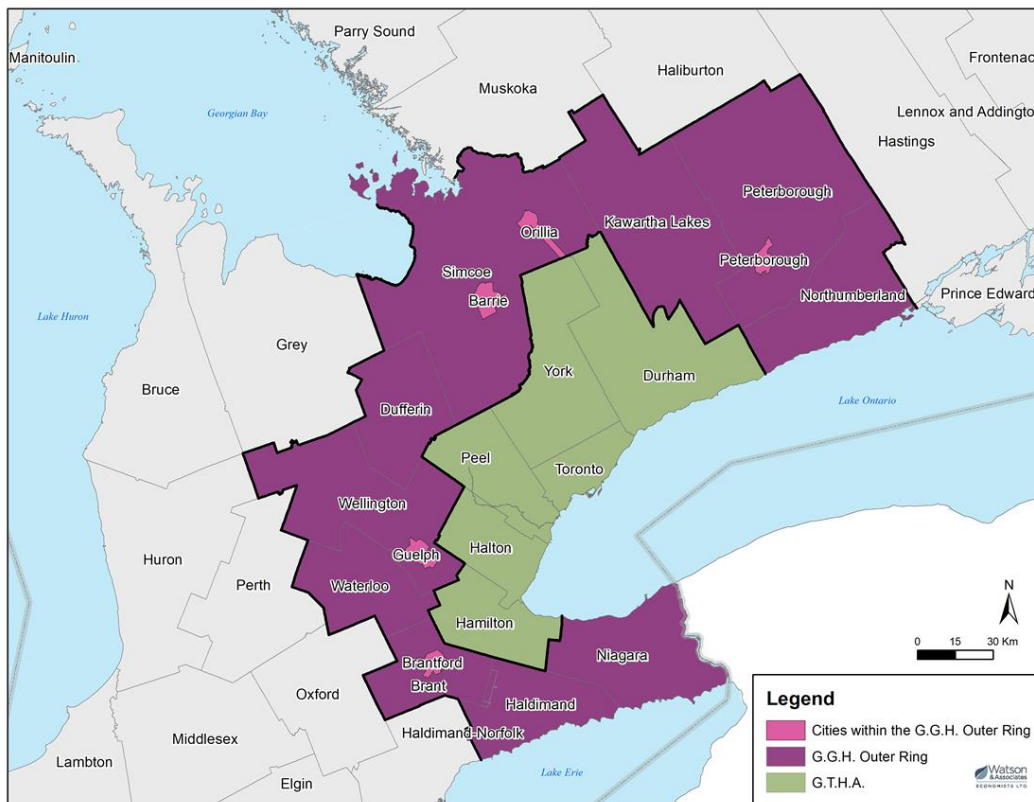


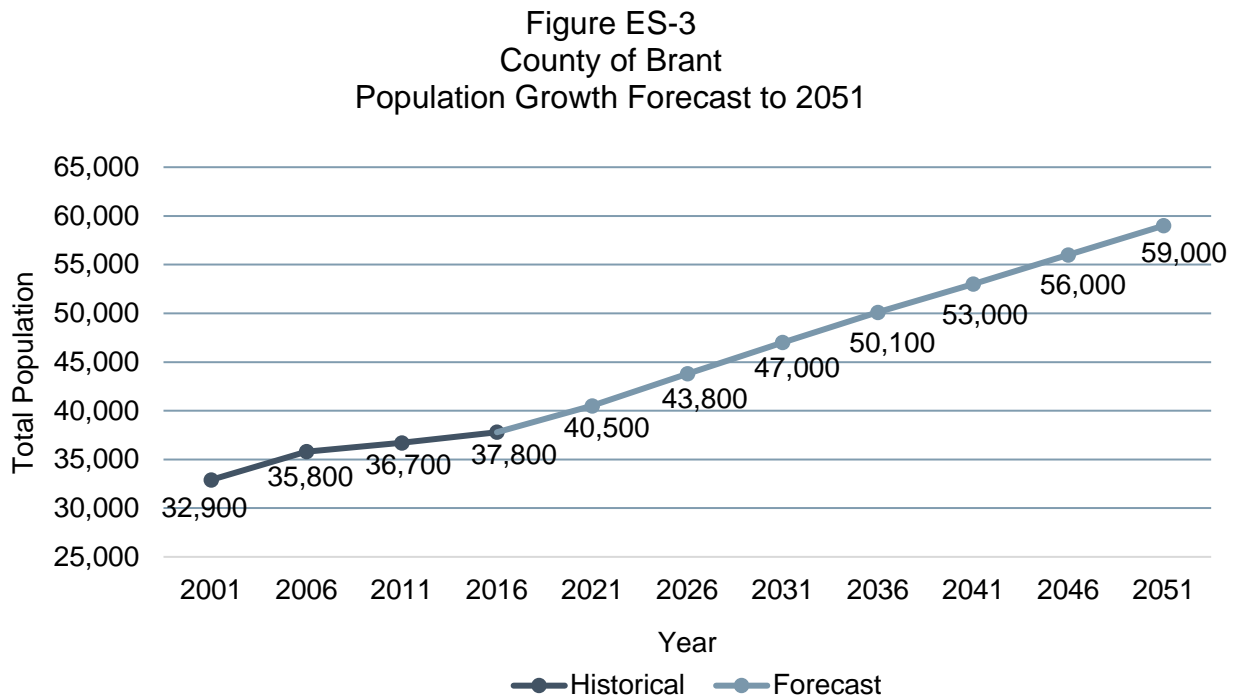
Figure ES-3 summarizes the County of Brant's total population growth forecast over the 2016 to 2051 forecast period relative to historical population between 2001 and 2016. By 2051, the County's total population base is forecast to grow to approximately 59,000. This represents an increase of approximately 21,200 persons between 2016 and 2051, or an average annual population growth rate of 1.3% during this time period. Based on the review of the County's long-term growth outlook provided in this report, the 2051 population and employment forecast, as set out in Schedule 3 of the Growth Plan, 2019, is the recommended long-term growth scenario for the County of Brant. The Schedule 3 Growth Plan, 2019 forecast for the County of Brant:

- 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 drivers on future development trends across the County; and



- Represents a reasonable increase in the share of total population and employment in the County of Brant relative to the G.G.H. Outer Ring as a whole.

As such, a higher long-term population forecast for the County of Brant is not supported for the purposes of long-term growth management and urban land needs analysis.



Note: Population includes net Census undercount.

Source: Historical data derived from from Statistics Canada Census and Annual Demographic Estimates: Subprovincial Areas, 2001 to 2016. Forecast by Watson & Associates Economists Ltd., 2020.

To accommodate the long-term population forecast, the County will require an additional 7,500 new households to be constructed over the 2021 to 2051 planning horizon, or just over 250 new households annually. As a comparison, this is approximately 66% higher than the average level of 150 new housing unit growth which was achieved from 2006 to 2016. It is anticipated that a large component of housing growth will include low-density housing; however, increasing demand is also anticipated for medium-density and high-density housing forms to provide greater choice in housing options by type and tenure for a broad range of residents by age and income.

Addressing the interconnection between the County's competitive economic position and its longer-term housing needs by market segment is critical in realizing the County's



future forecast population and employment growth potential, as well as the County's ultimate goals related to prosperity, opportunity, and livability. This approach recognizes that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. To ensure that economic growth is not constrained by future labour shortages, effort will be required by County of Brant to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

It is important to recognize that while the County's population base is growing it also is getting older. Between 2016 and 2051, the 75+ age group (older seniors) is forecast to represent the fastest growing population age group with an average annual population growth rate of 3.7%. With an aging population the County will be more reliant on net migration as a source of population as opposed to natural increase. With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand medium and high-density forms including seniors' housing and affordable housing options. The County of Brant is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.

County of Brant Population Growth Allocations, 2016 to 2051

Over the forecast horizon it is anticipated that the County's two Primary Settlement Areas (Growth Centres) as well its Secondary Settlement Areas, hamlets and remaining rural areas will all continue to experience housing growth. The Primary Settlement (Growth Centre) of Paris, located in the northern portion of the County just outside the City of Brantford is anticipated to accommodate a large portion of County's population growth (60%) over the long-term planning horizon. The Urban Settlement Area of St. George is anticipated to accommodate approximately one fifth of the County's population growth (20%), while the Rural System is anticipated to accommodate one fifth of the County's population growth (20%). A lack of municipal water servicing is expected to limit future residential development within the County's Secondary Settlement Areas and Hamlet Areas.



Over the forecast horizon, it is anticipated that the County will become increasingly more urban. As of 2016, approximately 42% of the County's population is within the Primary Settlement Areas, while 58% of the County's population is within Secondary Settlement Areas, Hamlets and Villages and the remaining rural area. Looking forward, it is anticipated that by 2051, approximately 58% of the County's population based will be concentrated within the Primary Settlement Areas, which includes Paris and St. George. It is anticipated that the Primary Settlement Areas within the County will accommodate an additional 16,800 persons by 2051. As a comparison, this growth increment is greater than the estimated Urban System population base as of 2016 (2016 population within the Urban System is estimated at 16,000). It is anticipated that the County's Urban Settlement Areas will play an increasing role in broadening future housing options available within the County with respect to housing by structure type. Chapter 5 explores the urban land requirements to accommodate future urban growth within the existing settlement boundaries of the Urban Settlement Areas.

Residential Intensification Target

It is recommended that the County target a higher intensification rate of 20% of housing growth within the B.U.A. The B.U.A. in Paris, and to a lesser extent, St. George offers an opportunity to accommodate a wide range of housing options (low, medium and high density), as well as the active planning applications/approved developments suggest that the County can achieve at least 48 units annually in the B.U.A.

Community Area Land Needs Assessment

The County has a robust supply of potential housing development in the planning approvals process (i.e. development pipeline). The County supply of housing in the development pipeline is anticipated to accommodate a greater range of housing options compared to the existing D.G.A. base.

Based on the comprehensive analysis carried out herein, it has been determined that the County has surplus of Community Area land of approximately 395 gross ha to 2051. These surplus lands are not considered to be needed until the post-2051 period and will be subject on ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered interchangeable with the identified shortfall of Urban Employment Areas, which is identified in Chapter 6. It is recommended that the County's new Official Plan will



identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify Excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.

Employment Area Analysis and Urban Employment Area Land Needs

The long-term economic outlook for the County is very positive. As previously noted, as the local employment base and economy within the surrounding commuter-shed continues to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population and population-related employment growth across the County.

Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated within neighbouring municipalities within the G.G.H. Outer Ring. As such, raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy will continue to be a key long-term economic development objective for the County of Brant. Achieving the County-wide employment forecast and allocations by settlement area (Paris and St. George) will also require significant investment and effort on behalf of both the public and private sector to attract and accommodate new employers and facilitate the expansion of existing businesses across a broad range of established and emerging employment sectors.

As previously noted, the County's competitive economic position is highly tied to its ability to attract and accommodate a growing skilled and unskilled labour force pool. To ensure that economic growth is not constrained by future labour shortages, effort will be required by the County of Brant and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options.

The County of Brant has a surplus of approximately 49 ha of designated urban commercial land to accommodate the commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.



The County has a shortfall of designated Urban Employment Area lands of approximately 105 gross ha. The shortfall within Paris is approximately 110 ha, while a small surplus of 5 gross ha has been identified in St. George. The County should explore options to add additional Urban Employment Areas, including expanding the settlement area boundary in Paris to accommodate additional Employment Area lands in the Paris 403 Business Park.

Employment Area Conversion

Changes to a site designated in the County's O.P. as "Employment" to allow for uses not permitted in the designation, including residential, mixed use and specific commercial uses, is considered an Employment Area land conversion. The conversion of Employment Area lands generally occurs during the M.C.R. process as there is a need to understand the broader impacts of the conversion under the policy framework of the Growth Plan, 2019 and P.P.S., 2020 as well as local site-specific considerations. As part of this M.C.R., Employment Area conversion requests have been reviewed and evaluated.¹ Based on this review, a series of recommendations have been made with respect to six sites within Urban and Rural Employment Area where conversion requests have been submitted.

It is recommended that all sites requested for conversion remain as Employment Area. It is recommended to broaden the permissions for commercial uses (as part of the proposed Grand River St. N. corridor overlay) for 326 Grand River St. N. in the Paris North Employment Area. A conversion request site evaluation has been completed for each Employment Area and is provided in Appendix K.

Settlement Area Boundary Expansion

It is recommended that the County expand the Urban Settlement Area Boundary to accommodate the need for Urban Employment Area land. As discussed, approximately 105 ha of Employment Area land is required. The County received numerous requests for S.A.B.E. expansion, however only requests to accommodate additional Employment Area land was reviewed as part of the M.C.R.

Settlement Area Boundary Expansion (S.A.B.E.) requests adjacent to the Paris 403 Business Park were selected as the focus area for review since these sites are in

¹ Refer to Section 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.



proximity to an Employment Area with the greatest demand for Employment Area growth. The Paris 403 Business Park has been identified by the County of Brant as a potential Provincially Significant Employment Zone (P.S.E.Z.), an area identified for long-term protection related to job creation and economic development. A request for the P.S.E.Z. has been submitted to the Province for the creation of a P.S.E.Z. within the Paris 403 Business Park. The Paris 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

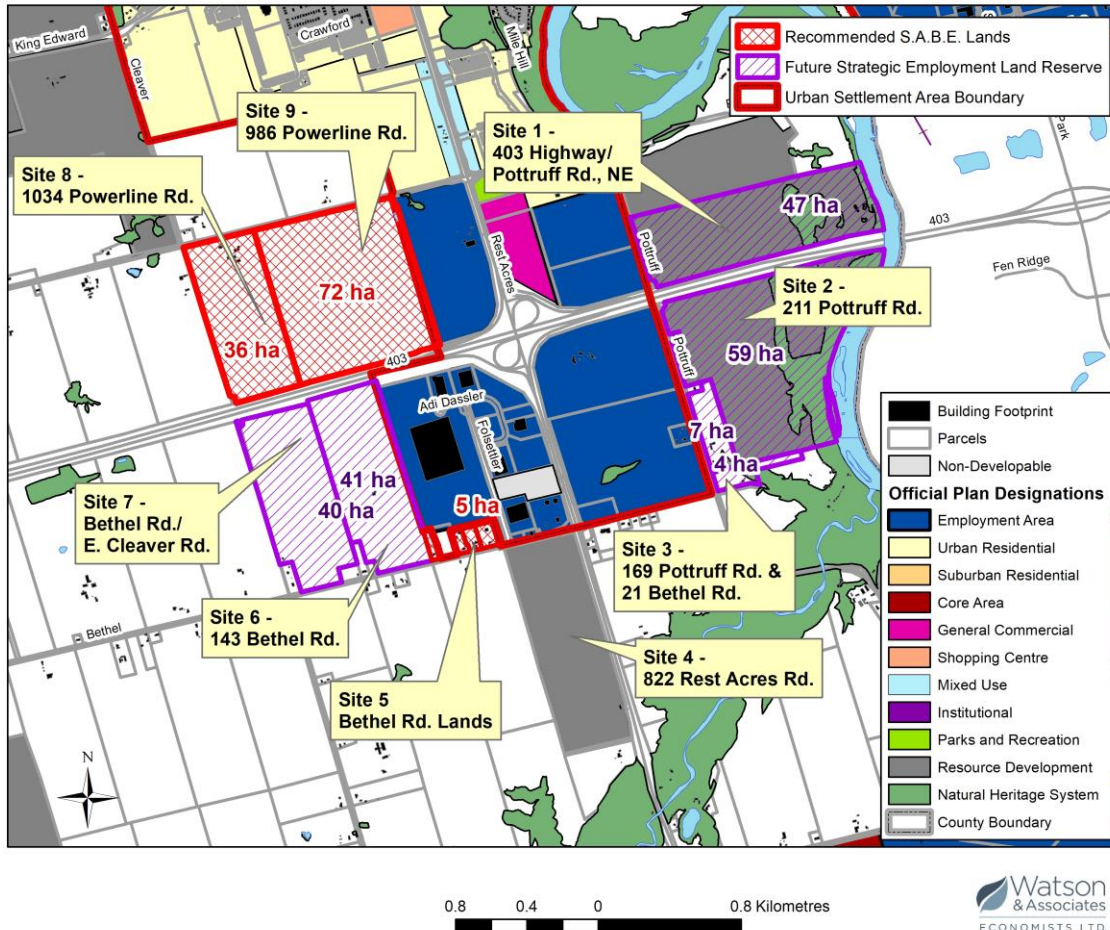
The S.A.B.E. requests in the Paris 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes which will be submitted and examined Province for review and approval:

- Municipal Servicing (water/wastewater and transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction impacts;
- Land-Use Planning; and
- Market Analysis.

As part of the S.A.B.E. analysis, the County identified lands for needed to accommodate demand between 2021 and 2051 (approximately 113 ha), as well as Future Strategic Employment Reserve lands (approximately 198 ha) which are identified for future S.A.B.E. if demand warrants over the 2051 horizon. Sites recommended for S.A.B.E. and as Future Strategic Employment Reserve are identified in Figure ES-4.



Figure ES-4
County of Brant
S.A.B.E. Candidate Sites and Sites Recommended for Expansion
403/Rest Acres Road Prestige Employment Corridor
Expansion to Paris Settlement Area Boundary

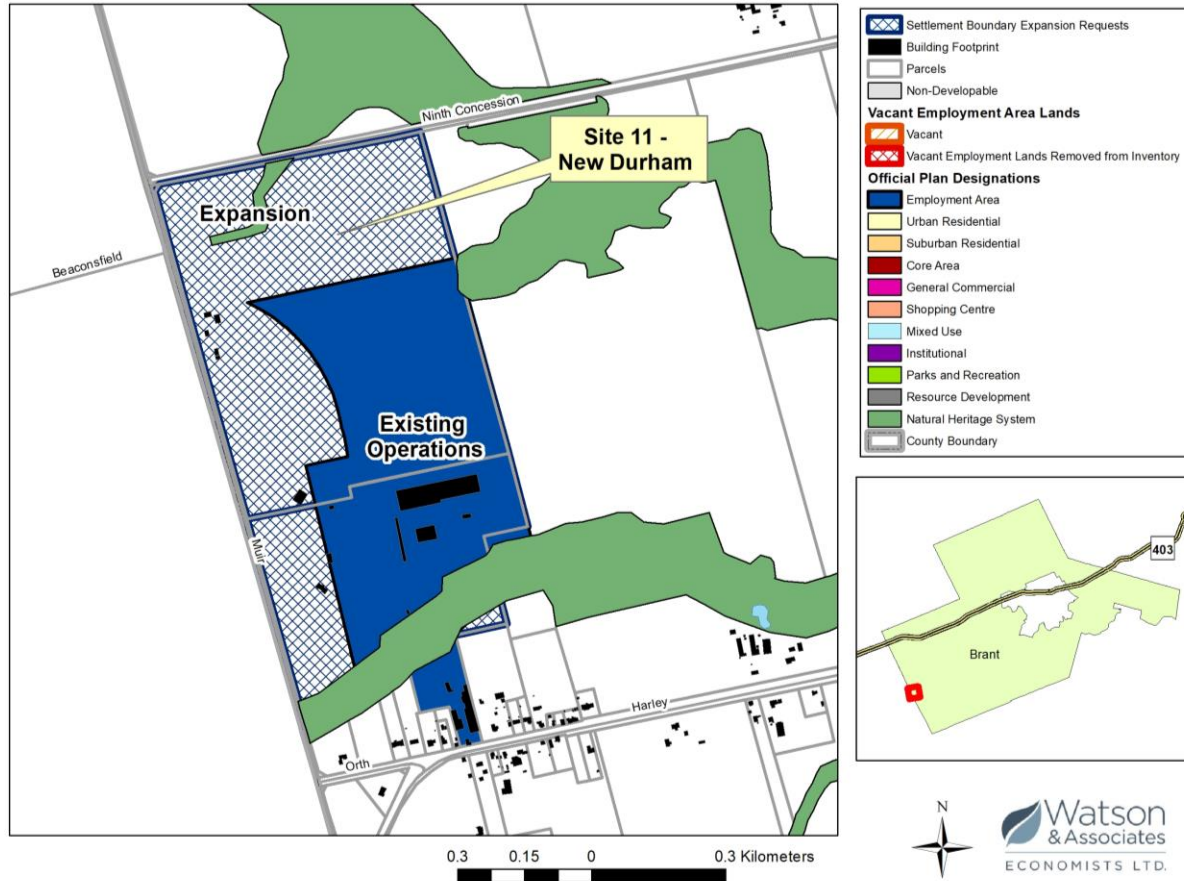


Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Expansions to Rural Employment Areas were also examined as part of this M.C.R. Figure ES-5 illustrates the location of a proposed S.A.B.E. totalling 23 ha to accommodate the potential expansion of an existing operation within the New Durham Rural Employment Area. Based on the Growth Plan, 2019 the request meets the S.A.B.E. requirements for Rural S.A.B.E. contingent on agricultural impact and M.D.S. requirements.



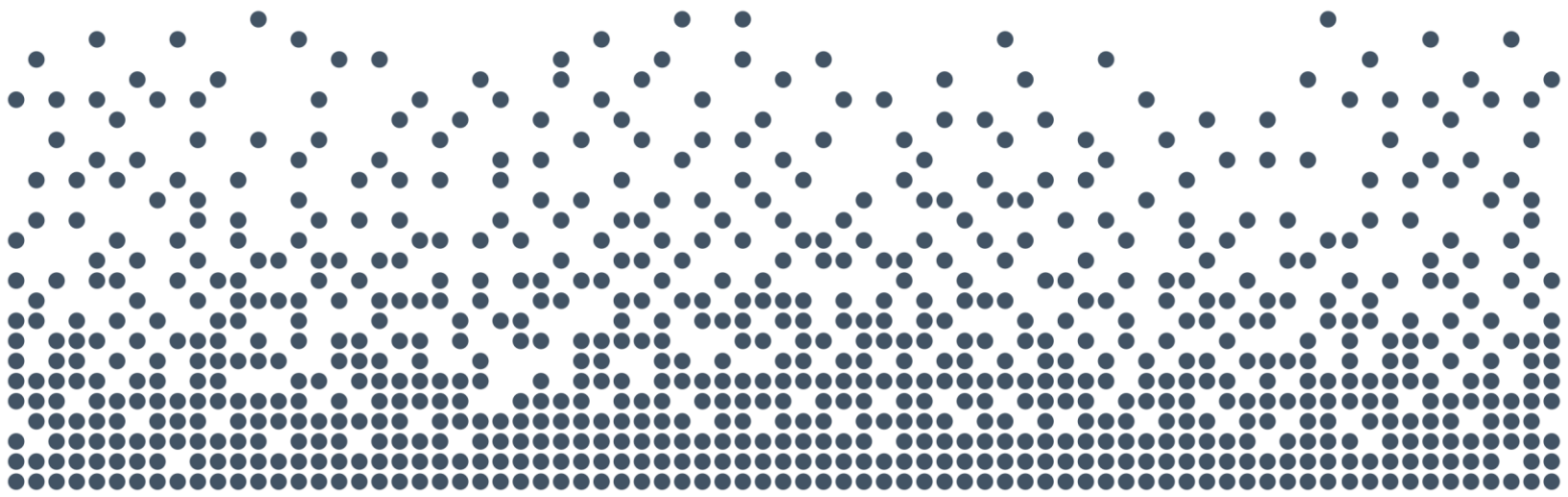
Figure ES-5
County of Brant
Recommended Rural Employment Area S.A.B.E.
New Durham Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Conclusions and Next Steps

A preliminary policy directions report has been prepared and is informed based on the findings of this M.C.R. report, as well as consultation with the public and council. The preliminary policy direction report was completed in tandem with this M.C.R. report. As key technical findings and milestones of the M.C.R. were presented to council and the public over the past year. This M.C.R. Report primarily includes information to support the Growth Management policy theme of the County's new O.P. These preliminary directions aim to inform and develop policies and procedures for the County of Brant to the year 2051 as based on seven strategic directions. The County's new O.P. has been completed in draft form for public comment.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

The County of Brant retained Watson & Associates Economists Ltd. (Watson) in early 2019 to prepare the growth management technical requirements of its Municipal Comprehensive Review (M.C.R.), and to provide the County with strategic policy recommendations to support the development of updated policies to the County's Official Plan (O.P.). The process of preparing an update to the County's O.P. represents an M.C.R. in accordance with section 26 of the *Planning Act*, R.S.O. 1990, c. P.13.

The M.C.R. technical reporting has been organized into one report which addresses the growth forecasts, growth allocations, land needs assessment and policy considerations.

Key components of this report include:

- A review of the existing policy content and community structure;
- Long-term population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by Urban Settlement Area and Rural System;
- Community Area land needs assessment including a review of designated residential and non-residential lands;
- Employment analysis and Employment Area land needs assessment;
- Employment Area conversion review;
- Settlement Area Boundary Expansion (S.A.B.E.) assessment; and
- Planning policy recommendations.

1.2 What is a Municipal Comprehensive Review?

An M.C.R. 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. An M.C.R. examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon. For municipalities located within the Greater Golden Horseshoe (G.G.H.), the long-term planning horizon is the year 2051.



The Province has defined a process for bringing an O.P. up to date with key parts of the Growth Plan, 2019¹ termed an M.C.R, which means:

“A new official plan, or an official plan amendment, initiated by an upper- or single-tier municipality under section 26 of the *Planning Act* that comprehensively applies the policies and schedules of this Plan.”

This process is specific to municipalities within the G.G.H. and is associated with its own deadline of July 1, 2022. The Growth Plan, 2019 and related guidelines set out how to complete an M.C.R.

Major components of an M.C.R. include:

- Review and refinement of the population, housing and employment forecasts;
- Review of intensification and density targets;
- Completion of an urban land needs assessment which determines if and how much new land will be needed to accommodate growth; and
- A review of O.P. policies and designations, including a range of themes, such as:
 - Building Healthy and Complete Communities;
 - Protecting What We Value;
 - How We Green;
 - Planning for Infrastructure;
 - Economic Development and Prosperity; and
 - Transportation and Mobility.

The results of the M.C.R. will assist staff in preparing amendments to the policies and maps in the County’s O.P. for consideration by Municipal Council. By completing the M.C.R., County staff will align the O.P. policies with the Growth Plan, 2019.

¹ A Place to Growth: Growth plan for the Greater Golden Horseshoe, 2019.



Chapter 2

Policy Context and Urban Structure



2. Policy Context and Community Structure

2.1 Policy Context

2.1.1 Provincial Policy Context

2.1.1.1 Provincial Policy Statement, 2020

The Provincial Policy Statement, 2020 (P.P.S., 2020) provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions “shall be consistent with” the P.P.S., 2020 (*Planning Act*, R.S.O. 1990, c. P. 13 s. 3).

The P.P.S., 2020 came into effect on May 1, 2020.¹ Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land-use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019) and the on-going updates to the Growth Plan. Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and to reduce barriers and costs to the land-use planning system in order to provide greater predictability.

A significant change of the P.P.S., 2020 with regard to housing policy is the provision of a housing options approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (Policy 1.4.3). Providing for housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

“A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts,

¹ Provincial Policy Statement, 2020 - Under the *Planning Act*. Ontario.



affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.”

Throughout the P.P.S., 2020, there is strong encouragement to consider the market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms that they have not historically had considerable success in implementing. As such, when discussing the outlook for the real estate market, it is important to discuss both existing conditions as well as the driving factors that are anticipated to encourage and disrupt housing market demand by structure type and built form. Furthermore, while market demand is important when considering long-range land-use planning, this demand must be broadly considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and diversifying an economic base and supporting job creation.

Notable policies related to planning for Employment Areas in the updated P.P.S., 2020 include requiring municipalities to have enough urban land supply to meet projected needs for a planning horizon of 25 years, and include Employment Areas as areas that could be planned for beyond this horizon, provided they are not designated beyond the planning horizon.

The P.P.S., 2020 recognizes the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. It provides details on how municipalities should plan for employment. The P.P.S., 2020 policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The policy further outlines that, during an O.P. review or update, planning authorities assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2).



2.1.1.2 *A Place to Growth, Growth Plan for the Greater Golden Horseshoe, 2019*

The Growth Plan, 2019, which was created under the *Places to Grow Act, 2005*, was updated in May 2019 and amended in August 2020. It sets out where and how growth will occur across the G.G.H. to 2051 and that all planning decisions shall conform to it.

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. Relevant aspects of the Growth Plan, 2019 for this study include the following:

Managing and Directing Growth

- Growth will be directed to settlement areas and within settlement areas in areas with existing or planned public service facilities;
- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential with convenient access to local stores, services and public service facilities;
- Municipalities should plan for a diverse range and mix of housing options, including second units and affordable housing, to accommodate people at all stages of life, and to accommodate the needs of all household sizes and incomes;
- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of mixed-use, pedestrian-friendly urban environments; and
- Municipalities should preserve lands within settlement areas in the vicinity of major highway interchanges, ports, rail yards and airports for manufacturing and associated retail, office and ancillary facilities where appropriate.

Minimum Intensification Targets¹

- New minimum intensification targets, the minimum percentage of all residential development occurring annually within the delineated built-up area (B.U.A.), have been created for upper-tier and single-tier municipalities in the G.G.H. There are two geographic groups for intensification targets. The County of Brant is in the

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.2.



lower intensification target group, which requires that by the time the next M.C.R. is approved and in effect, and for each year thereafter, the County maintain or improve upon the minimum intensification target contained in the O.P.

- It is important to note that all upper-tier and single-tier municipalities within the G.G.H. can apply for alternative intensification targets.

Minimum Greenfield Density Targets¹

- New minimum density targets have been created for the horizon of the Growth Plan, 2019 for G.G.H. upper-tier and single-tier municipalities and include two geographic groups. It is important to note that the greenfield density targets established in the Growth Plan, 2019 do not include employment lands.² The County of Brant is in the lower density target group, which is required to plan to achieve within the horizon of this Plan a minimum density target that is not less than 40 residents and jobs combined per hectare.
- All upper-tier and single-tier municipalities can apply for alternative designated greenfield area (D.G.A.) density targets.

Employment³

- According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within the settlement area. The density targets are to reflect the current and anticipated type and scale of employment that characterizes the Employment Area to which the target applies. Further, the minimum employment density target reflects opportunities for the intensification of Employment Areas on sites that support active transportation and are served by existing or planned transit.⁴
- As part of the Growth Plan, 2019, the Province allows for employment land conversions outside of an M.C.R., while ensuring protections are in place to safeguard key Employment Areas as needed.
- The conversion of employment lands to a designation that permits non-employment uses is allowed outside of an M.C.R., provided that

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.

² Ibid., section 2.2.7.

³ Ibid., section 2.2.4.

⁴ Ibid., section 2.2.5.



- there is a need;
- a significant number of jobs are maintained on those lands through the establishment of development criteria;
- there are no adverse effects on the viability of an Employment Area or the achievement of minimum intensification targets; and
- there are existing or planned services in place.¹

Settlement Area Boundary Adjustments and Expansions²

- The Growth Plan, 2019 places emphasis on a more outcome-focused approach to urban boundary expansions, rather than specifying types of studies required to justify the feasibility and location of expansions.
- Municipalities are allowed to undertake settlement area boundary expansions that are no larger than 40 ha (approximately 99 acres) outside of the M.C.R. process, subject to criteria.
- Settlement area boundary adjustments are also permitted outside of an M.C.R. provided there is no net increase in land within settlement areas, subject to criteria.
- If applicable, municipalities within the G.G.H. Outer Ring are required to identify excess lands and prohibit development on such lands to the horizon of this Plan.

Amendment 1 to A Place to Grow

On August 28, 2020, the Province released Amendment 1 to A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 which has been incorporated into an Office Consolidation, August 2020 document. The Growth Plan, 2019 has been amended in conjunction with a revised outcome-based Land Needs Assessment (L.N.A.) methodology for the G.G.H. These documents are in effect as of August 28, 2020.

The population and employment growth forecast horizon set out in Schedule 3 of the Growth Plan, 2019 and the applicable time horizon for land-use planning have now been extended to 2051. It is further noted that the recommended Schedule 3 growth forecasts are to be treated as minimums, with higher growth forecast alternatives permitted by upper- and single-tier municipalities through their respective M.C.R.

¹ Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.5.10.

² Ibid., section 2.2.8.



process.¹ If an alternative growth forecast that exceeds Schedule 3 of the Growth Plan, 2019 is utilized, the M.C.R. must demonstrate that the alternate growth scenario meets the Growth Plan, 2019 policy objectives of accommodating a range of housing choices to meet market demand and the needs of current and future residents, as well as providing additional labour opportunities for the G.G.H. labour market.² It should be noted that higher forecasts established by upper- and single-tier municipalities through their M.C.R.s will not apply to provincial ministries and agencies.³

2.1.1.3 Land Needs Assessment Methodology for the Greater Golden Horseshoe

The Minister formally issued the final Land Needs Assessment (L.N.A.) methodology on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.⁴ This methodology replaces the previous L.N.A. methodology for the G.G.H. that was issued on May 4, 2018. The revised L.N.A. methodology focuses on a more simplified and outcome-based approach in comparison to the 2018 L.N.A. methodology. Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019, to assess the quantity of land required to accommodate forecast growth.

The L.N.A. methodology identifies that the results of an L.N.A. can only be implemented through an M.C.R. As previously identified, an M.C.R. is a new O.P, or an Official Plan Amendment (O.P.A.) initiated by an upper- or single-tier municipality under section 26 of the *Planning Act*, which comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

“Community Areas: Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land

¹ Growth Plan, Office Consolidation 2020, Policy 5.2.4, p. 56.

² A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe, p. 6.

³ Growth Plan, 2019, Policy 5.2.4.8, p. 57.

⁴ A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



employment jobs. Community areas include *delineated built-up areas* and *designated greenfield areas*.”

“**Employment Areas:** Areas where most of the employment land employment jobs are (i.e., employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the employment area. Employment areas may be in both *delineated built-up areas* and *designated greenfield areas*.”¹

2.1.2 County of Brant Official Plan, 2012

2.1.2.1 Overview

The County of Brant O.P. (2012) is being reviewed as part of this M.C.R. process as it relates to growth management, growth forecasts, housing, and employment directions. As part of the M.C.R. and the O.P.’s five-year review process, the County is required to update the County’s O.P. with the current version of the Growth Plan, 2019 (as amended, Office Consolidation 2020). As previously discussed, the Growth Plan, 2019 requires municipalities to update their respective O.P. to a 2051 horizon, including reviewing and evaluating the minimum density and intensification targets and forecasts contained in the Growth Plan as part of the M.C.R. process. The County is creating a new O.P. as part of the M.C.R.

In the current County of Brant’s O.P. (2012), Primary Settlement Areas, including Paris, St. George and Cainsville, areas that are fully serviced, are identified as preferred growth areas. It is important to note that while the Cainsville settlement area is currently identified in the County’s O.P. as a Primary Settlement Area, it does not have a provincially delineated B.U.A. or vacant residential land for urban development, which excludes it from the provincial L.N.A. methodology. The new Official Plan has deemed Cainsville as a Secondary Settlement Area and is not a Strategic Growth Area and will not have additional residential growth.

The County’s partially serviced Secondary Urban Settlement Areas include Mount Pleasant and Oakhill/Airport. These areas are anticipated to accommodate a modest amount of the new development. Other Secondary Urban Settlement Areas include Burford, Scotland, and Oakland which have private services. These areas in addition to the other settlements (Hamlets and Rural Residential Areas) without County water and

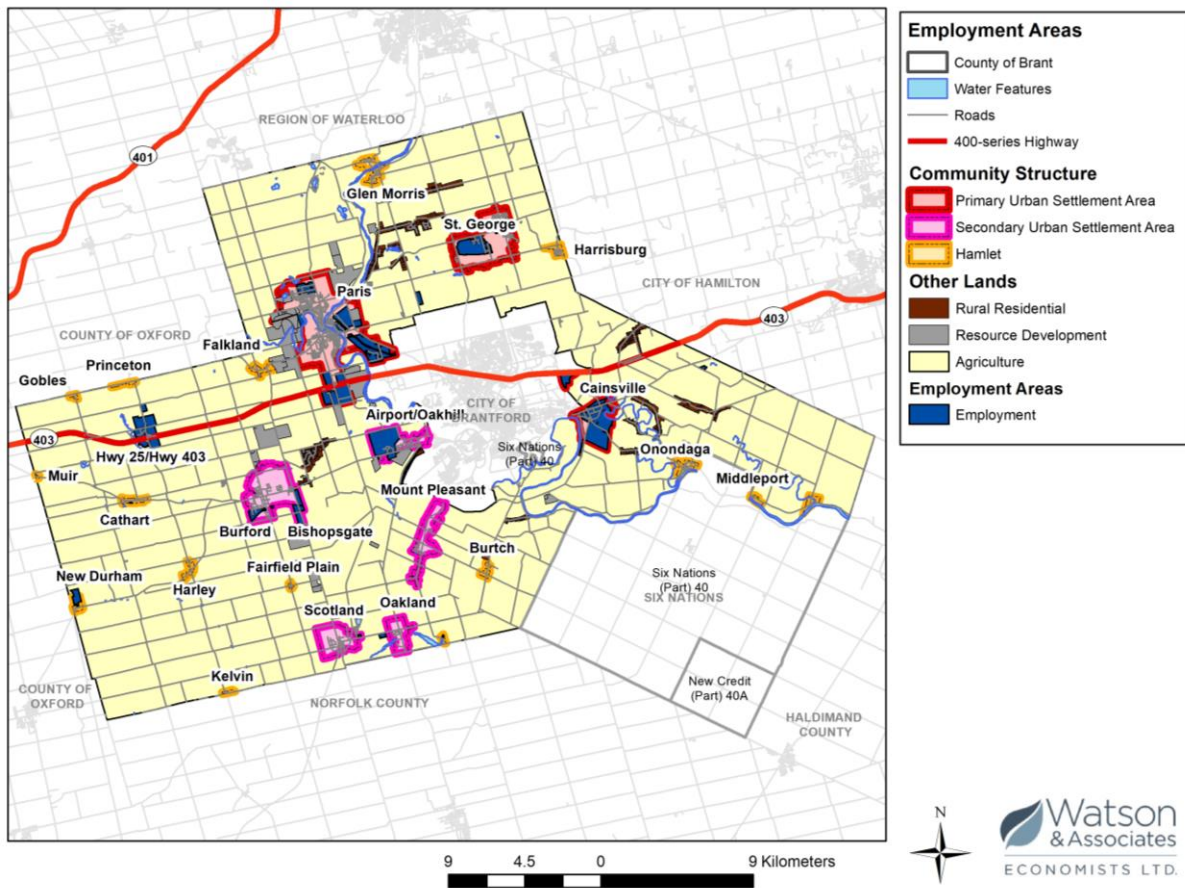
¹ Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 6, 7 and 15 to 18.



sewer services, are projected to accommodate a limited amount of forecast growth within the County. The current O.P. (2012) also notes limited opportunities for growth in the remaining rural area through severance and Additional Residential Unit (A.R.U.) opportunities.¹

Figure 2-1 provides a map of the settlement types.

Figure 2-1
County of Brant
Current County of Brant O.P. (2012)
Settlement Classification



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

The County's current O.P. (2012) defines three major housing density types generally based on housing type and density (i.e., number of units per ha). Low density includes

¹ County of Brant, O.P., 2012, Policy 1.11.2.4.1, p. 1-11.



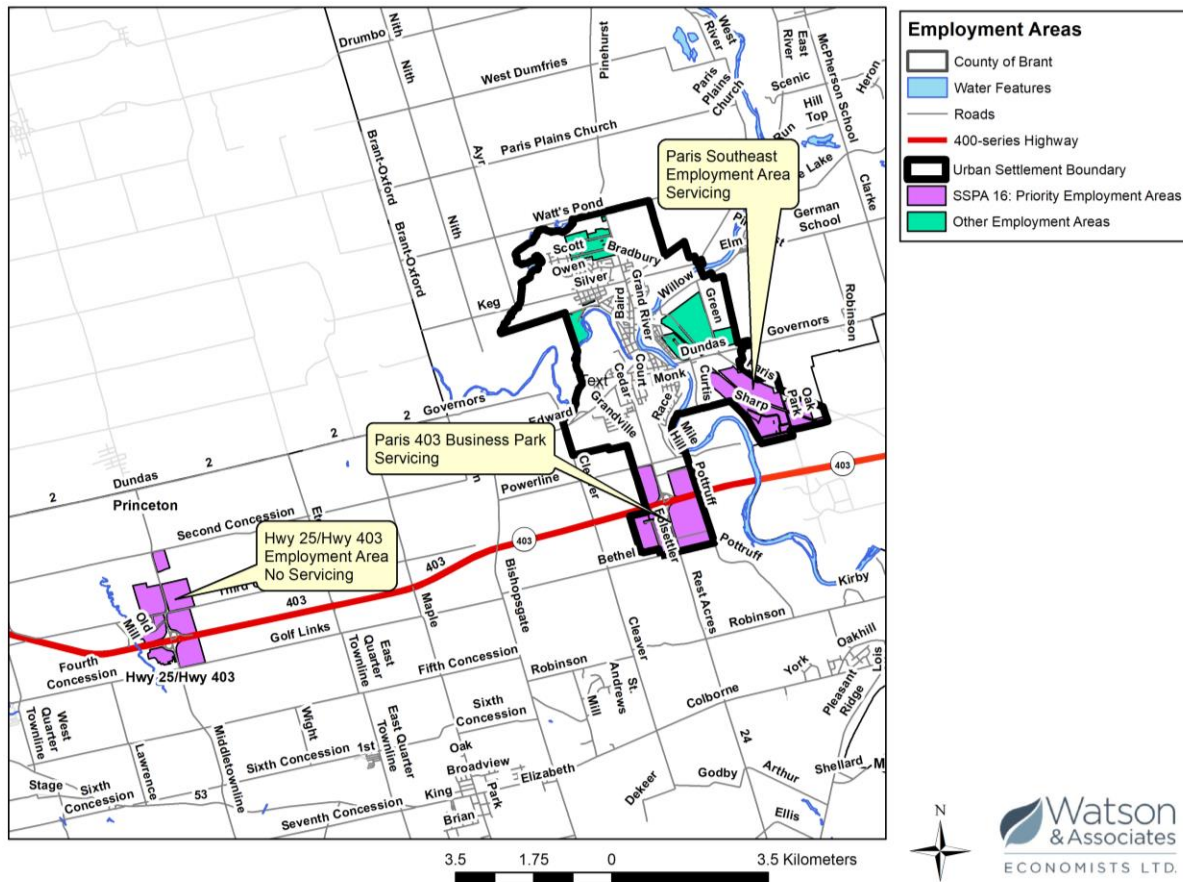
housing developments with a density not exceeding 20 units per ha and generally includes single detached, semi-detached and duplexes. Medium density includes housing developments permitted in low density with a density between 20 to 40 units per ha, as well as street fronting townhouses and low-rise apartments not exceeding 40 units per ha. High density includes all other housing types permitted in low and medium density with a density of 40 to 100 units per ha, as well as high-rise apartments.¹ The County's O.P. generally does not permit high-density housing forms with a density greater than 100 units per ha.

The County has one Employment Area designation in the County's current O.P. (2012), which includes both serviced and unserved Employment Areas. In addition, the County has Site-Specific Policy Areas (S.S.P.A.), including a Priority Employment Area overlay (S.S.P.A. 16), which provides protection of these employment lands from conversions and identifies these areas as a priority for future Employment Area development. S.S.P.A. 16 identifies three Employment Areas as Priority Employment Areas, including the Paris 403 Business Park, a portion of the Paris Southwest Employment Area and a dry industrial area near the Highway 25 and Highway 403 interchange. These lands are located along Highway 403, as identified in Figure 2-2.

¹ County of Brant, O.P., 2012, Policies 3.3.4., 3.3.5 and 3.3.6, pp. 3-11 to 3-12.



Figure 2-2
County of Brant
Current County of Brant O.P. (2012)
S.S.P.A. 16 – Priority Employment Areas



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Key growth management targets of the current County's O.P. (2012) include the following:

- The D.G.A. of the County is planned to achieve a minimum density target that is not less than 30 residents and jobs combined per hectare, increasing to 35 residents and jobs combined per hectare by 2012, and 40 residents and jobs combined per hectare by 2022;¹

¹ County of Brant, O.P., 2012, Policy 2.2.2.3., p. 2-3.



- A minimum three-year supply of land that is able to be serviced for designated residential and employment development, redevelopment, and intensification is to be maintained;
- At all times, the accommodation of a minimum of 10 years' residential growth, including development, redevelopment, and intensification, needs to be ensured.
- By the year 2015 and for each year thereafter, the County shall strive to meet a minimum target that 15% of all residential development occurring in the County is within the B.U.A., which includes the serviced areas of St. George and Paris, as well as Burford which is unserviced;
- Residential developments are not to exceed 100 units per ha; and
- An overlay should identify three Priority Employment Areas.

The existing County O.P. does not provide direction on the amount of growth allocated to the Urban System, and it does not provide a density target for Employment Areas.

2.2 Community Structure

The County of Brant includes a blend of urban and rural communities. Provided herein is an overview of the structural components of the Urban and Rural System, including an assessment of the existing County O.P. framework compared to the provincial Growth Plan, 2019 policy framework.

The Growth Plan, 2019 requires municipalities, through the M.C.R. process, to develop a hierarchy of settlement areas that identifies where and how the municipality will grow over the 2051 planning horizon. Further, the Growth Plan, 2019 requires the majority of the growth to be directed to the Urban System, comprised of fully serviced (water/wastewater servicing) settlement areas. In addition to an Urban System, the County of Brant has a large Rural System, comprising a large geographical area of the County. The Rural System also includes a large portion of the County's population within rural settlement areas and several vibrant Employment Areas. The structural components of the Rural System are different than the Urban System with respect to function, role and scale.



2.3 Urban System

The Urban System includes urban settlement areas that are to accommodate most of the future residential and non-residential development. A key objective of the Urban System is to direct growth where there is planned and existing infrastructure in a manner that supports the principles of complete communities. Complete communities include a diverse mix of land uses that provide opportunities to live, shop and work in the same community. According to the Growth Plan, 2019, the County of Brant is required to also establish a hierarchy within the Urban System and within settlement areas.¹

Within the Urban System, growth is to be prioritized within the B.U.A. The B.U.A. includes an area within a settlement that is municipally serviced (water and wastewater) and was delineated by the Province to represent the approximate area developed as of 2006. The County of Brant has two fully serviced settlements with a delineated B.U.A., including Paris and St. George. Figures 2-3 and 2-4 illustrates the B.U.A. and D.G.A. of the settlements of these two communities.

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.1., p. 14.



Figure 2-4
County of Brant
St. George Settlement Area
D.G.A. and B.U.A.



Municipalities are required to explore opportunities to delineate strategic growth areas (S.G.A.s), areas that primarily prioritize intensification growth within the B.U.A. S.G.A.s can include major redevelopment areas, corridors with high-order transit, Major Transit Station Areas (M.T.S.A.s) and Urban Growth Centres (U.G.C.s), as identified in the Growth Plan, 2019. Based on a review of the B.U.A.s of the two settlement areas, the B.U.A.s of the County do not offer a large enough geographic area and scale to identify S.G.A.s. As such, it is recommended that the County consider the entire B.U.A. as an S.G.A. for intensification.



2.3.1 What is the Urban Area?

The urban area includes settlement areas that have full municipal servicing. These settlements have a B.U.A. where growth is to be prioritize first within the municipality. Urban areas have a mix of uses that support complete communities, including Urban Employment Areas. Urban areas outside Urban Employment Areas are referred to as Community Areas.

Urban Areas include settlement areas with full municipal servicing.

It should be noted that the Growth Plan, 2019 and the provincial L.N.A. definition of Urban Area is based on the ability of a Settlement Area to accommodate growth through intensification in the B.U.A. A key objective of the Growth Plan is to take an intensification first approach to growth which involves directing growth to the B.U.A. Municipalities may have a different definition of an Urban Area; however, settlement area boundary expansions (identifying land needs) are required to follow the provincial policies. As such, if the Municipal definition of an Urban Area is broader than the Growth Plan definition, the Municipality should provide a further breakdown of the Urban Areas in the O.P. that identify those that meet the provincial requirements of Growth Plan, 2019, policies 2.2.1. and 2.2.8. and the provincial L.N.A.

2.3.2 What is an Employment Area?

Employment Areas are clusters of industrial or export-based employment. Employment Areas accommodate uses in a range of industrial sectors as well as limited commercial uses (uses that complement the Employment Area). Employment Areas provide opportunities for economic activities that cannot be accommodated other areas, given the potential for incompatibility of surrounding uses. Land uses such as major retail, large institutional uses (e.g., schools), and residential uses are considered sensitive uses and are not permitted within an Employment Area. The Growth Plan, 2019 requires upper- and single-tier municipalities, in consultation with lower-tier municipalities, to designate all Employment Areas in the O.P. and protect them for appropriate employment uses over the long term.¹

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.5., p. 19.



Non-residential uses on lands not classified as Employment Areas are a part of the Community Area that supports the settlement area. Community Areas are the lands within the urban settlement area (Primary Urban Growth Settlements) that exclude Employment Areas. Community Areas accommodate residential uses as well as non-residential uses that support local residents and visitors/tourists.

2.3.3 Structural Components of the Urban System

The following is a summary of the key structural components of the Urban System:

- **Built-up Area (B.U.A.)** – priority areas to accommodate urban growth.
- **Designated Greenfield Area (D.G.A.)** – developing areas to accommodate the remaining urban growth not accommodated in the B.U.A.
- **Employment Areas** – areas that are protected from sensitive uses and accommodate export-based or industrial employment.
- **Community Areas** – areas that accommodate residential and employment outside Employment Areas, including major retail.
- **Major Retail** – commercial uses that are part of the highest level of commercial hierarchy within the urban area. Major retail is often defined by size; however, it should also be defined based on function.

2.4 Rural System

The Rural System includes lands that are protected from large-scale urban development. A key objective of the Rural System is to protect agriculture land, resources and the natural environment, while encouraging economic and cultural activities that support the health and prosperity of rural communities.

2.4.1 What is the Rural Area?

The Rural Area is generally the area within the municipality with no or partial municipal servicing (water/wastewater servicing). According to the Growth Plan, 2019, the Rural Area is comprised of rural settlement areas, rural lands and prime agricultural lands.¹

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Definitions, p. 81.



Rural settlement areas include existing hamlets or similar existing small settlement areas that are long established in the O.P. These communities are typically serviced by individual, private, on-site water and/or private wastewater systems.¹ It is further noted that all settlement areas are identified as hamlets in the Greenbelt Plan such as rural settlements in the Oak Ridges Moraine Conservation Plan, or as minor urban centres in the Niagara Escarpment Plan, are considered rural settlement areas in meeting the Growth Plan, 2019 definition.² According to the Growth Plan, 2019, a limited amount of growth is allocated to rural settlement areas.³

Rural lands include non-prime agriculture lands (including rural residential lots) outside rural settlement areas. Rural lands accommodate uses that are not appropriate in settlement areas, including resource-based activities and recreational activities. Rural lands also include **Rural Employment Areas**,⁴ which are defined as a cluster of industrial activities outside settlement areas, typically with partial or no services. Future Rural Employment Area growth is largely to be directed to existing designated Rural Employment Areas (as of June 16, 2006) or through expansions to accommodate existing business operations.⁵

Prime agriculture areas are where prime agricultural lands predominate. This includes areas of prime agricultural lands and associated Canada Land Inventory Class 4 through 7 lands and additional areas where there is a local concentration of farms and ongoing agriculture activities. Prime agricultural areas are to be identified by the Ontario Ministry of Agriculture, Food and Rural Affairs (O.M.A.F.R.A).⁶

2.4.2 Structural Components of the Rural System

The following is a summary of the key structural components of the Rural System:

- **Rural settlement areas** – hamlets and small-scale settlements that are to accommodate a limited amount of growth on land with private or partial servicing. According to the Growth Plan, 2019, rural settlement areas should serve as

¹ Ibid.

² Ibid.

³ Ibid., p. 13.

⁴ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9., p. 27 and Definitions, p. 81.

⁵ Ibid., Policy 2.2.9., p. 27.

⁶ Ibid., Definitions, p. 79.



community hubs where public service facilities are maintained and adapted to the needs of the surrounding community.¹

- **Prime agriculture lands** – lands identified by the O.M.A.F.R.A. where agricultural uses predominate. These lands are to be protected; however, diversification of on-farm uses (uses that are secondary to the principal agricultural use of the property) is encouraged.²
- **Rural Employment Areas** – clusters of industrial activities outside settlement areas on non-serviced lands. Rural Employment Area growth is limited to existing designated lands (as of June 16, 2006) or through the expansion of existing business operations.
- **Other rural lands** – all other non-serviced lands. These lands are to accommodate a limited amount of growth. Growth on these lands is primarily limited to resource development, recreational-based and other economic activities not accommodated within settlement areas.

2.5 Existing County of Brant Community Structure

The current County of Brant O.P. (2012) Community Structure includes the following components:

- Primary Settlement Areas
 - Full Services with delineated B.U.A.: Paris and St. George
 - Full Services: Employment Areas – Paris, St. George and Cainsville
- Secondary Settlement Areas
 - Partial Services: Mount Pleasant and Oakhill
 - Partial Services: Airport Employment Area
 - Private Services with delineated B.U.A.: Burford
 - Private Services without delineated B.U.A.: Scotland and Oakland
 - Private Services Employment Areas: Highway 25/Highway 403 Employment Area
- Hamlets
 - Private Services: 15 settlements
- Other Employment Areas (Not a Primary or Secondary Settlement Area)

¹ Ibid., Policy 2.2.9, p. 27 and Definitions, p. 81,

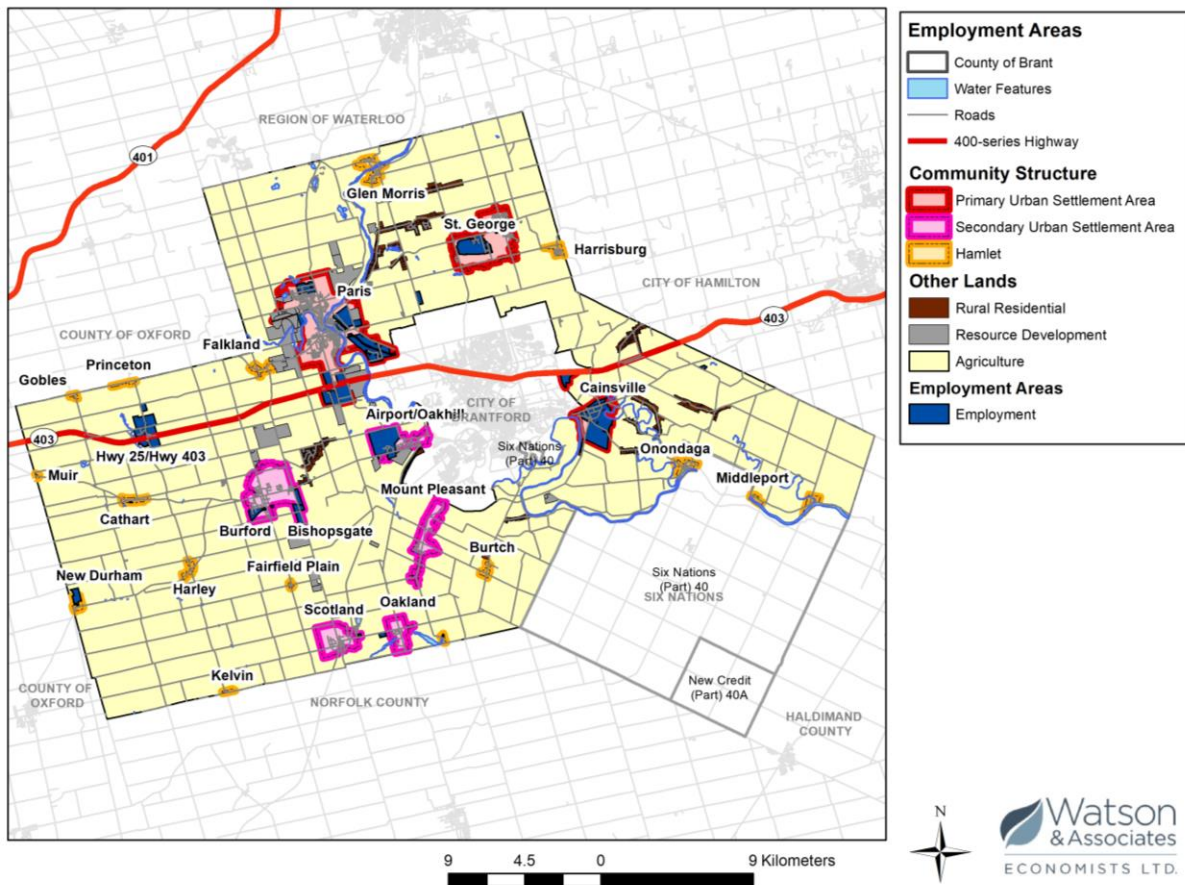
² Ibid., p. 78.



- Private Services: five Employment Areas
- Rural Residential Areas
 - Private Services
- Resource Development
- Agriculture

The existing County of Brant Community Structure is provided in Figure 2-5.

Figure 2-5
County of Brant
Current County of Brant O.P. (2012)
Existing Community Structure



Source: Watson & Associates Economists Ltd. based on current County of Brant O.P. (2012).



2.5.1 Proposed Changes to the County's Community Structure

2.5.1.1 Urban System and Rural System

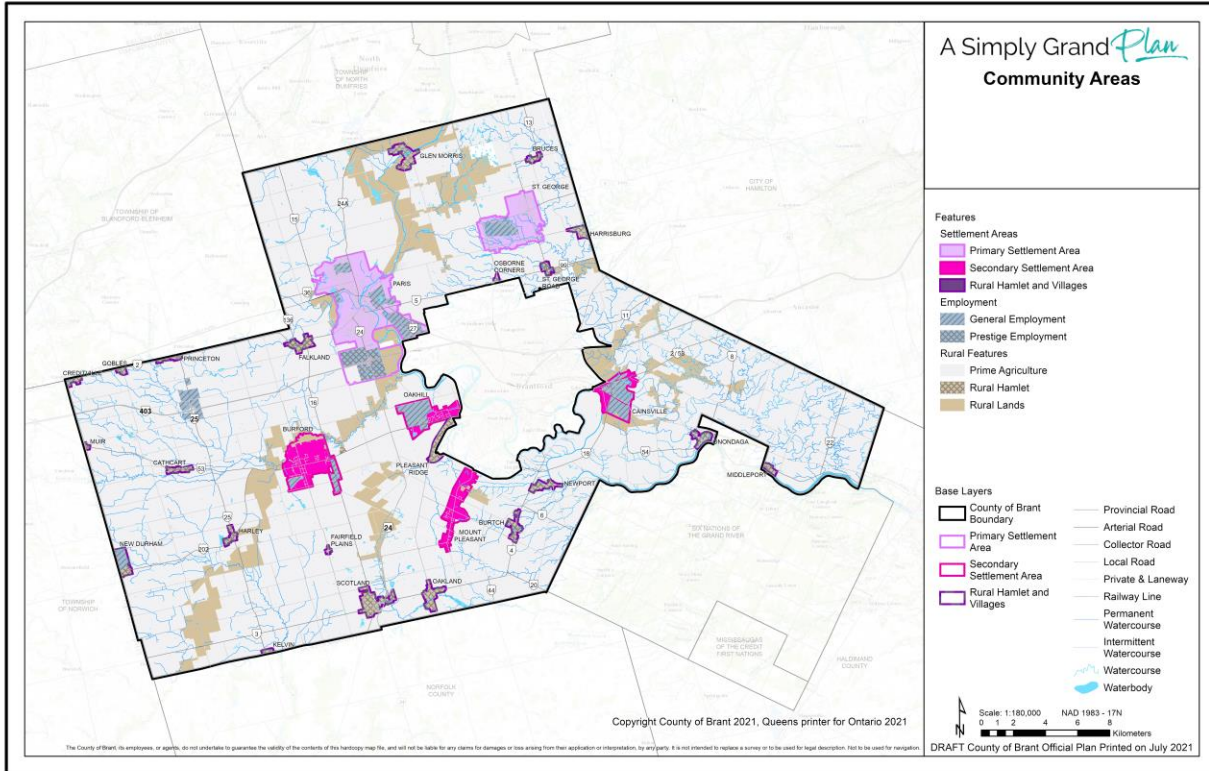
A key distinction between the Rural System and the Urban System is the amount and type of growth to be allocated. The Growth Plan, 2019 requires the majority of the forecast growth to be allocated to the areas with servicing (water/wastewater), i.e., Primary Settlement Areas (Growth Centres). While Secondary Settlement Areas have only partial servicing and limited municipal servicing (some cases servicing studies are pending) are classified as part of the Urban System in the County's new O.P., recognizing the development character of the settlement area. For the purposes of the M.C.R. Report, Secondary Settlement Areas are grouped within the Rural System in accordance with the provincial L.N.A. The Secondary Settlement Areas are anticipated to accommodate some growth based on existing servicing capacity and subject to further servicing review. In terms of a hierarchy these areas are considered a higher priority for growth than the villages and hamlets and remaining rural area. The urban land needs assessment is based on fully-serviced lands within the Primary Settlement Area and includes Paris and St. George.

Growth within the Rural System is to be compatible with the rural setting and provide opportunities to support the rural base.

Figure 2-6a and 2-6b summarizes the proposed Urban and Rural System.



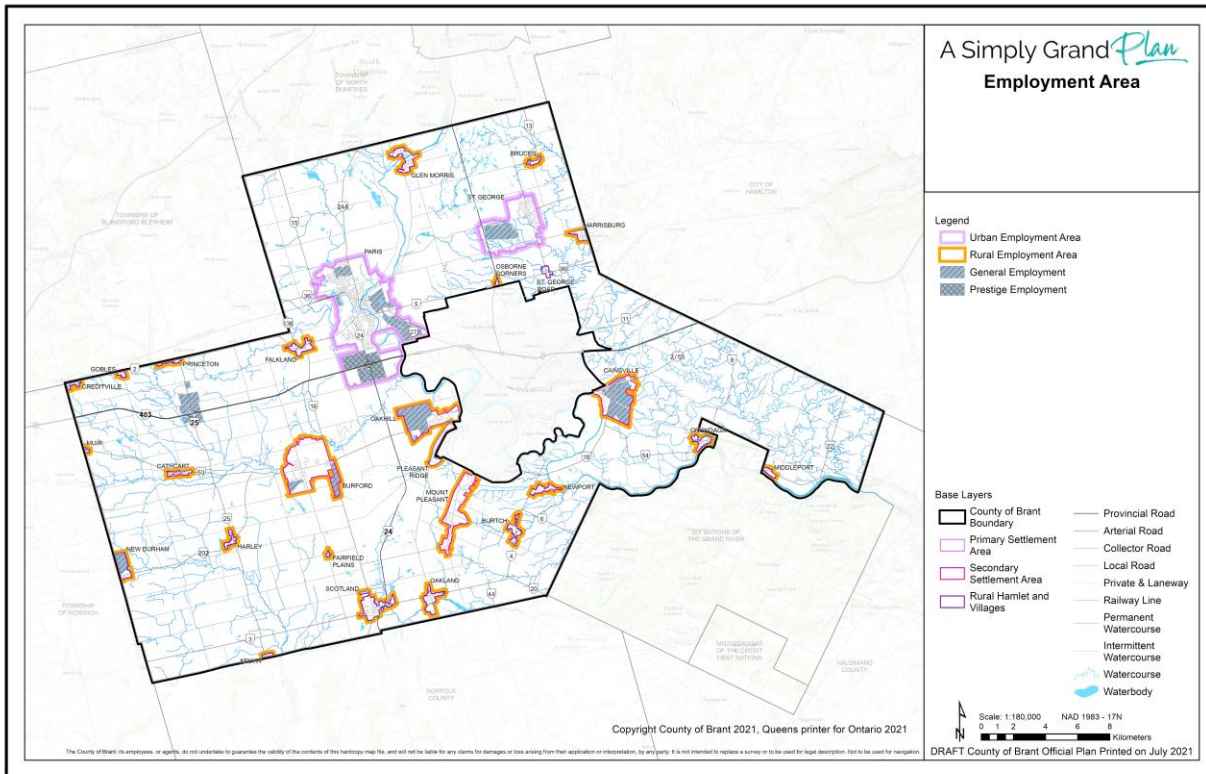
Figure 2-6a
County of Brant
Proposed Urban and Rural System



Source: County of Brant, Draft New O.P.



Figure 2-6b
County of Brant
Proposed Urban and Rural System
Employment Areas



Source: County of Brant, Draft New O.P.

2.5.1.2 Rural System Components

It is recommended that the County consider providing a distinction in the O.P. between the Rural System and the Urban System on the basis of servicing and the amount of growth to be accommodated within the Rural System. Further, the County's hamlets are an integral component of the County's rural area. While the settlement areas of Cainsville, Mount Pleasant, Burford and Oakhill meet the definition of rural settlement area according to the Growth Plan, 2019, the County should consider classifying these settlement areas as Secondary Settlement Areas since these settlement areas that have the opportunity to accommodate moderate urban growth. As Secondary Settlement Areas, these rural settlement areas will be considered a priority in directing growth outside the Primary Settlement Areas of Paris and St. George.



Within the Rural System, is proposed to include the following components in the County's new O.P.:

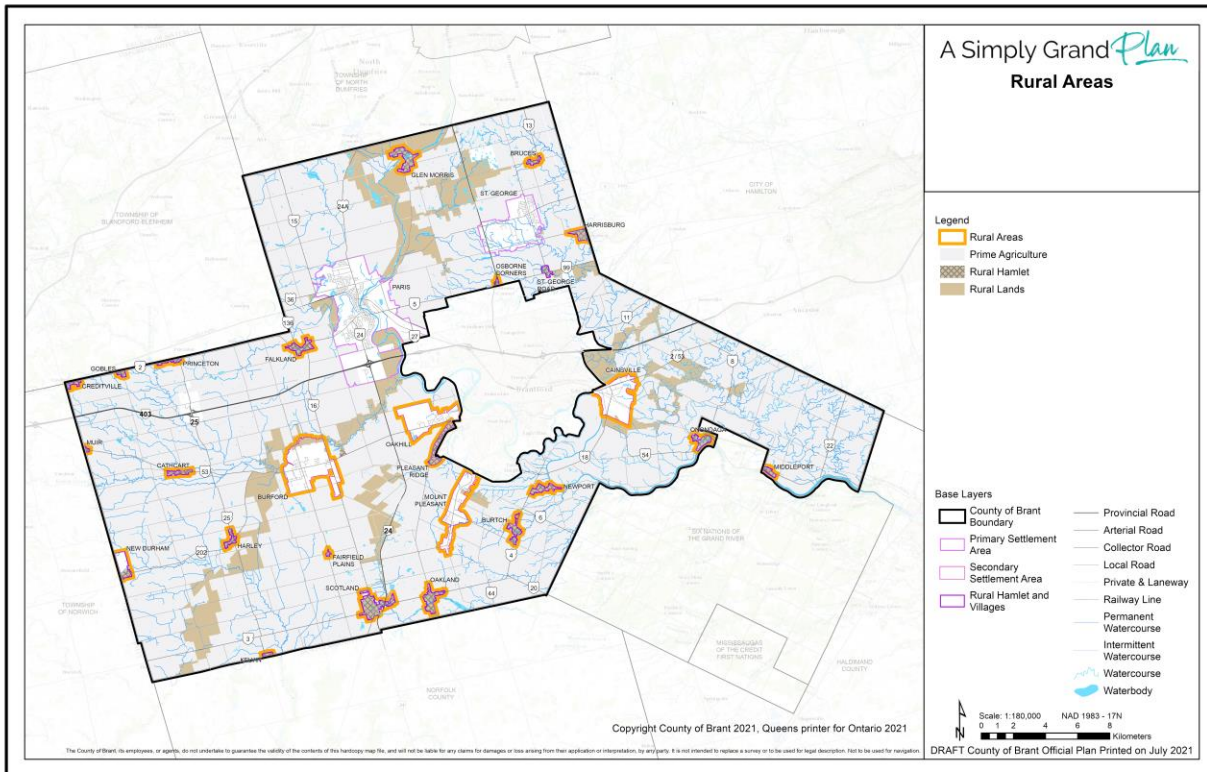
- Rural Hamlets and Villages
- Rural Employment Area (General Employment)
- Rural Lands
- Prime Agriculture Holding (Overlay)
- Prime Agriculture
- Parks and Open Space
- County Natural Heritage System Designation
- Erosion Hazard Lands and Flooding Hazards Designation.

Secondary Settlement Areas are proposed to be classified as part of the Urban System in the County's new O.P., however are subject to Growth Plan, 2019 Rural Settlement Area policies, including settlement area boundary expansion policies. As previously discussed, for the purposes of this M.C.R. Report and in accordance with the provincial L.N.A., Secondary Settlement Areas are grouped with the Rural System.

Figure 2-7 provides the proposed Rural System, including Secondary Settlement Areas. Refer to Figure 2-6b for Employment Areas.



Figure 2-7
County of Brant
Proposed Rural System, including Secondary Settlement Areas



Source: County of Brant, Draft New O.P.

2.5.1.3 Urban System Components

The Paris and St. George settlement areas are proposed as Primary Growth Settlements. These settlement areas provide full services, a delineated B.U.A., a concentration of public facilities and a range of land uses. These Primary Growth Settlements comprise the core settlements within the Urban System. Secondary Settlement Areas are considered a secondary component of the Urban System.

Within the Urban System, the following are Settlement Areas:

- Primary Settlement Areas (Growth Centres) – subject to Land Needs Assessment; and
- Secondary Settlement Areas (limited servicing and studies pending)

Within the Urban System, the following are the designations:



- Neighbourhoods Designation
- Community Corridors Designation
- Community Nodes Designation
- Parks and Open Space Designation
- Prime Agriculture Holding (Overlay, Secondary Settlement Areas only)
- Employment Areas:
 - Prestige Employment Designation (Highway 403)
 - General Employment Designation
- Natural Heritage System and Natural Hazards:
 - County Natural Heritage System Designation
 - Erosion Hazard Lands and Flooding Hazards Designation

Within the Urban System, the hierarchy would further be broken down with respect to growth opportunities, as follows:

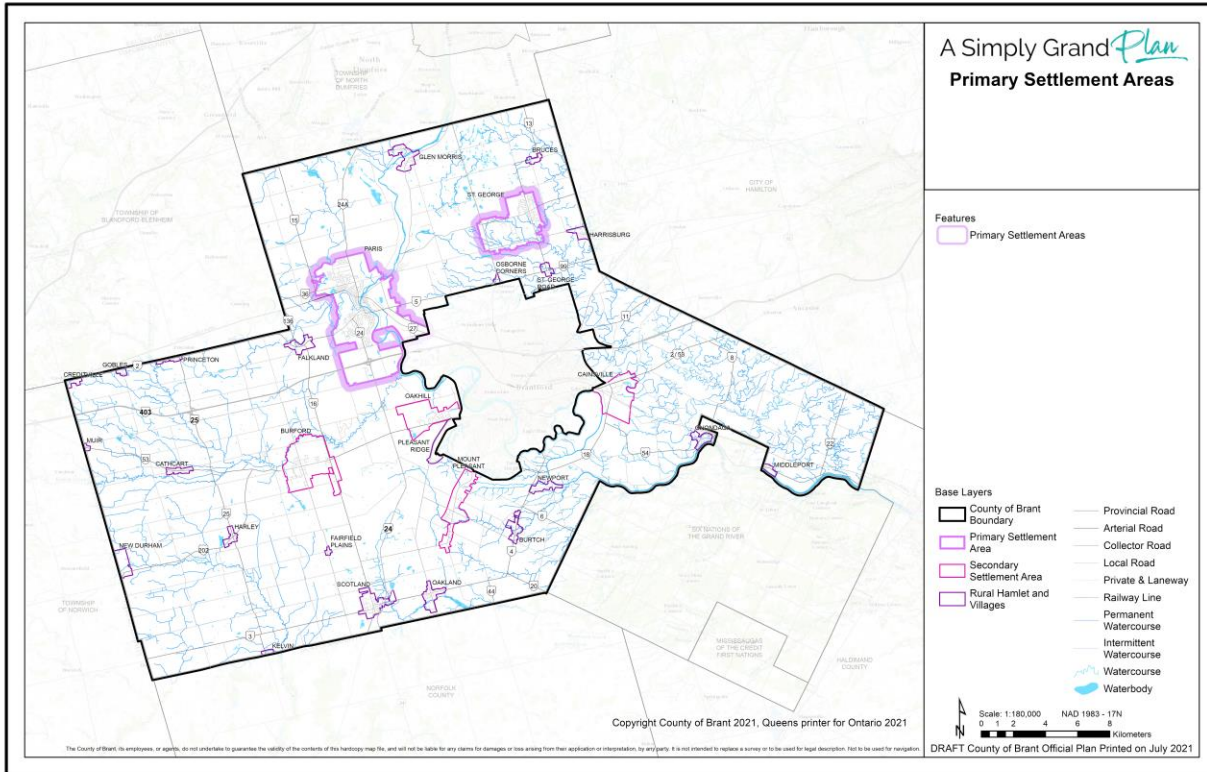
- D.G.A.;
- B.U.A.; and
- Urban Employment Areas.

Figure 2-8 provides a map of the proposed Urban System, Primary Settlement Areas.

As previously noted, Secondary Settlement Areas are proposed to be classified as part of the Urban System, however for the purposes of this M.C.R. are classified as within the Rural System.



Figure 2-8
County of Brant
Proposed Urban System – Primary Settlement Areas



Source: County of Brant, Draft New O.P.



Chapter 3

Population and Housing Analysis



3. Population and Housing Analysis

This chapter provides an assessment of forecast population and housing growth trends for the County of Brant to the year 2051 within the broader context of the G.G.H. An overview of historical population and housing trends, as well as economic and demographic growth drivers, is also included to provide context regarding the long-term growth outlook for the County. The allocation of population and housing by Urban Settlement Area and Rural System in addition to planning policy area ((D.G.A., B.U.A. and Rural Area) is discussed in Chapter 4 – Population and Housing Growth Allocations.

3.1 Introduction

3.1.1 *What Drives Population Growth?*

A broad range of considerations related to demographics, economics and socio-economics is anticipated to impact future population and employment growth trends throughout the County of Brant over the 2016 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the form, density, and location of residential and non-residential development.

As a starting point, 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 economy within the County and the surrounding region – which in this case is largely represented by the G.G.H. The G.G.H. represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents a portion of the commuter-shed for the County of Brant. Potential employment opportunities within the County and the surrounding commuter-shed represent the primary driver of net migration to this area.

The employment base within the County of Brant and the surrounding commuter-shed can be grouped into two broad categories – export-based sectors and community-based sectors, the latter primarily referring to local population serving employment. Export-based sectors are comprised of industries (i.e., economic clusters) that produce goods that reach markets outside the community (agriculture and primary resources, manufacturing, research and development as well as other knowledge-based industries). Local industries also provide services to temporary and/or other residents



of the municipality not captured by Census data as part of the permanent population base such as hotels, restaurants, tourism-related sectors, colleges and universities, as well as businesses related to financial, professional, scientific and technical services.

Economic growth in the regional export-based economy generates wealth and economic opportunities which, in turn, stimulates community-based or population-related employment sectors, including retail trade, accommodation and food and other service sectors. Economic development subsequently drives the need for labour force growth which is largely generated from positive net migration. Ultimately, population growth in the County of Brant within the 0-64 age group, will continue to be largely driven by net migration associated with the working age population and their dependents (i.e., children, spouses not in the labour force, others). On the other hand, population growth of the County's 65+ population will continue to be largely driven by the aging of the County's existing population and, to a lesser extent the attractiveness and affordability of the County to new seniors. A more detailed discussion of the long-term economic, socio-economic and demographic drivers of long-term population and employment growth in Brant County are provided in section 3.3.

3.1.2 Population, Housing and Employment Forecasting Approach

The population, household and employment growth forecast provided herein has been developed in accordance with the provincial L.N.A. methodology. The provincial L.N.A. methodology requires a population forecast by age structure and a housing forecast to be completed by applying an age-specific household formation rate based on propensities to choose different types of dwellings. This approach is commonly referred to as the cohort-survival population forecast methodology.

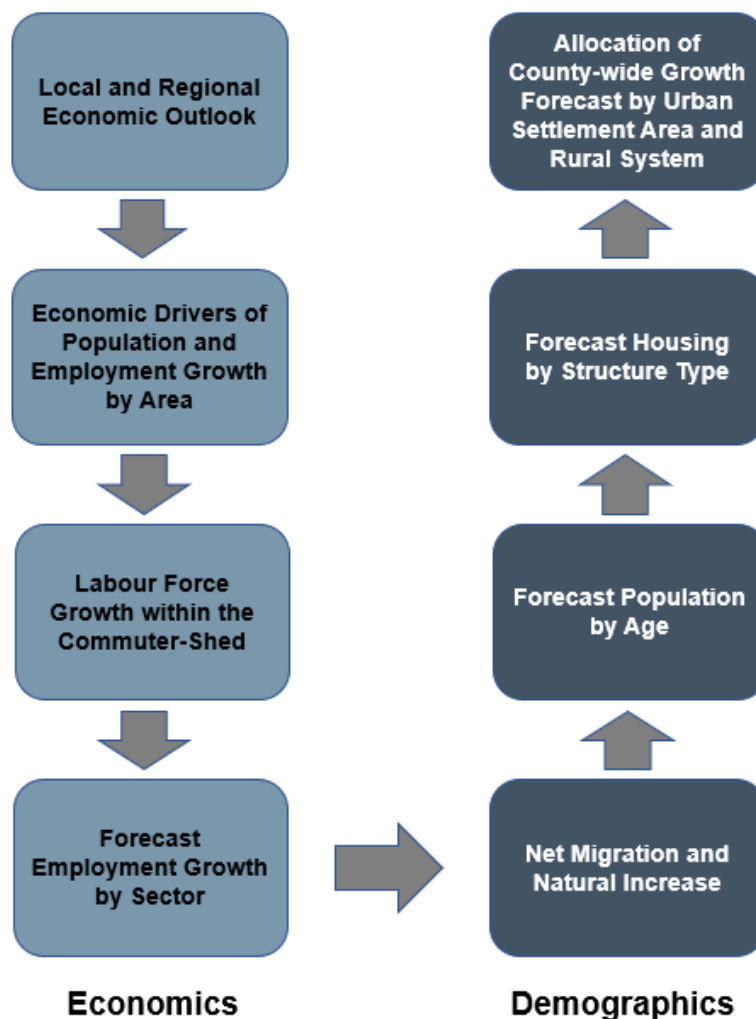
The cohort-survival population forecast methodology uses, as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality, less out-migration, by age group). Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy.

Generally, households occupied by persons between the age of 30 and 64 have a higher average persons per unit (P.P.U.) when compared to households occupied by



younger and older adults (19 to 29 and 65+ age groups). Comparatively, Brant County has a higher proportion of persons who are 65 years of age or older relative to the Province as a whole. This is important to recognize because as the County's population ages over the forecast planning horizon, its average P.P.U. level is anticipated to decline. The results of this demographic trend are further discussed in section 3.3.6 regarding forecast housing needs to 2051. Figure 3-1 summarizes the population, housing and employment forecast methodology.

Figure 3-1
Approach to Long-Term Population, Household and Employment Forecast





3.1.3 Housing Classification

Provided below is a summary of the housing structure types by density grouping included in the housing analysis of this report. The housing structure types have been categorized to align with Statistics Canada housing data and is consistent with the provincial L.N.A. These density groupings are compared with the County of Brant O.P. definitions in Figure 3-2 and are summarized below:

- Low-density residential development includes single detached and semi-detached housing. These are housing units with no units below or above. The definition of low-density residential development in the County of Brant O.P. also includes duplexes, Additional Residential Units (A.R.U.)¹ and street-fronting townhouses not exceeding 20 units per ha.²
- Medium-density residential development includes ground-oriented townhouse units, also referred to as rows and apartments in duplexes (two units located one above the other). The definition of medium-density residential development in the County of Brant O.P. includes units of the housing type permitted in the low-density category with a density between 20 units to 40 units per ha, as well as stacked-towns, special needs buildings, and low-rise apartments (four or less storeys) with a maximum density of 40 units per ha.³
- High-density residential development includes low-rise and high-rise apartment buildings. These are units that are below and/or above a unit. It is important to note that a secondary suite added to a single detached, semi-detached or townhouse unit is considered high density, reflecting the average occupancy of these units. The County of Brant O.P. classifies high-density development as high-rise apartments, as well as any unit type previously mentioned that exceeds 40 units per ha (the maximum is 100 units per ha).⁴

¹ Also referred to as Secondary Suites. According to the County of Brant O.P., an A.R.U. is permitted on the same lot as the primary dwelling, either internally within the primary dwelling or externally or within a detached structure.

² County of Brant Official Plan, 2012, Policy 3.4, pp. 3-10 to 3-14.

³ Ibid.

⁴ Ibid.



Figure 3-2
Housing Structure Type Classification

Housing Structure Type	County of Brant Municipal Comprehensive Review, 2021	County of Brant Current O.P. (2012)
Single Detached and Semi-detached	Low Density	Low Density (maximum density of 20 units per ha)
Duplex	Medium Density	Low Density (maximum density of 20 units per ha)
Townhouse/Row	Medium Density	Low Density: street-fronting townhouses (maximum density of 40 units per ha) Medium Density: stacked townhouses (maximum density of 40 units per ha)
Apartments	High Density	Medium Density: low-rise apartment buildings with a maximum height of four storeys High Density: apartment building exceeding four storeys and other units exceeding 40 units per ha (maximum 100 units per ha)
Additional Residential Units (A.R.U.)	High Density	Low Density



3.2 Review of Historical Census Population and Housing Growth Trends

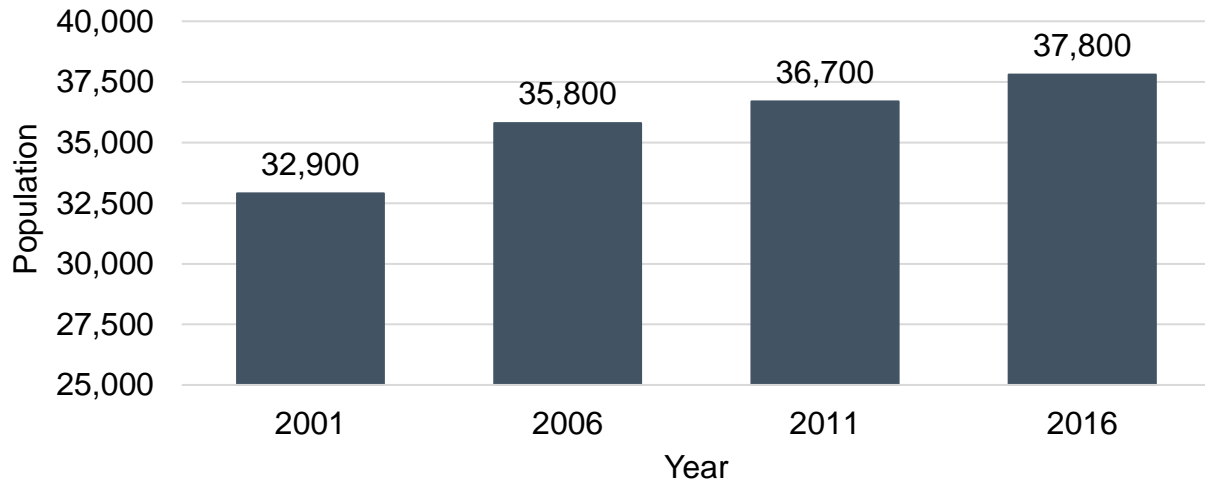
3.2.1 County of Brant Population Growth, 2001 to 2016

Figure 3-3 summarizes historical population for the County of Brant over the 15-year period from 2001 to 2016. As illustrated, the County's population base increased from 32,900 in 2001 to 37,800 in 2016. Over the past decade, the population base within the County has increased by 4,900 persons, or approximately 0.9% per year. As a comparison, the average annual population growth rate within the G.G.H. was 1.3%.

Figure 3-4 identifies the municipalities within the G.G.H., including the municipalities that comprise the Greater Toronto and Hamilton Area (G.T.H.A.) as well as those located in the G.G.H. Outer Ring. Figure 3-5 summarizes the annual population growth rate of all upper-tier/single-tier municipalities within the Outer Ring of the G.G.H. Overall, this area achieved an average annual population growth rate of 1.0% over the 2001 to 2016 period. As summarized in Figure 3-5, the City of Barrie, the County of Simcoe and the City of Guelph experienced the highest rate of annual population growth within the G.G.H. Outer Ring. The County of Brant's growth rate was close to the middle of the annual population growth range of G.G.H. Outer Ring municipalities, which ranged from 0.2% in the County of Haldimand to 2.0% in the City of Barrie. Over the 2001 to 2016 historical period, the County of Brant represented 2% of the population growth within the G.G.H. Outer Ring.



Figure 3-3
County of Brant
Historical Population, 2001 to 2016



Note: Population includes net Census undercount.

Source: Derived from Statistics Canada Census, 2001 to 2016, by Watson & Associates Economists Ltd.

Figure 3-4
Map of the G.T.H.A. and G.G.H. Outer-Ring

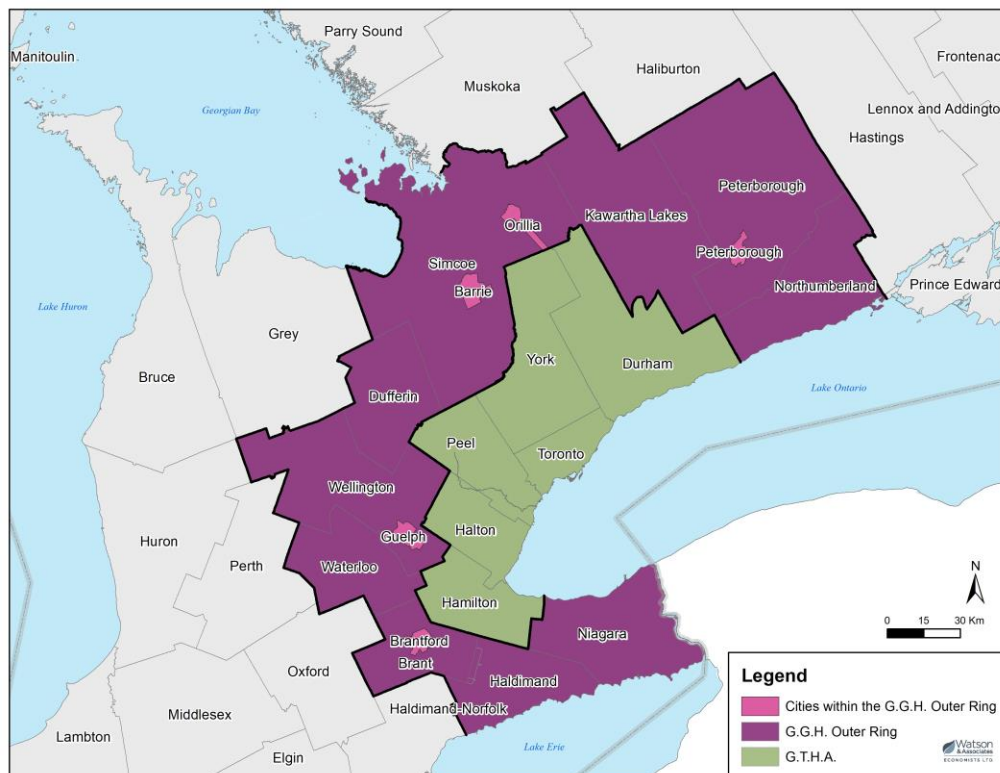
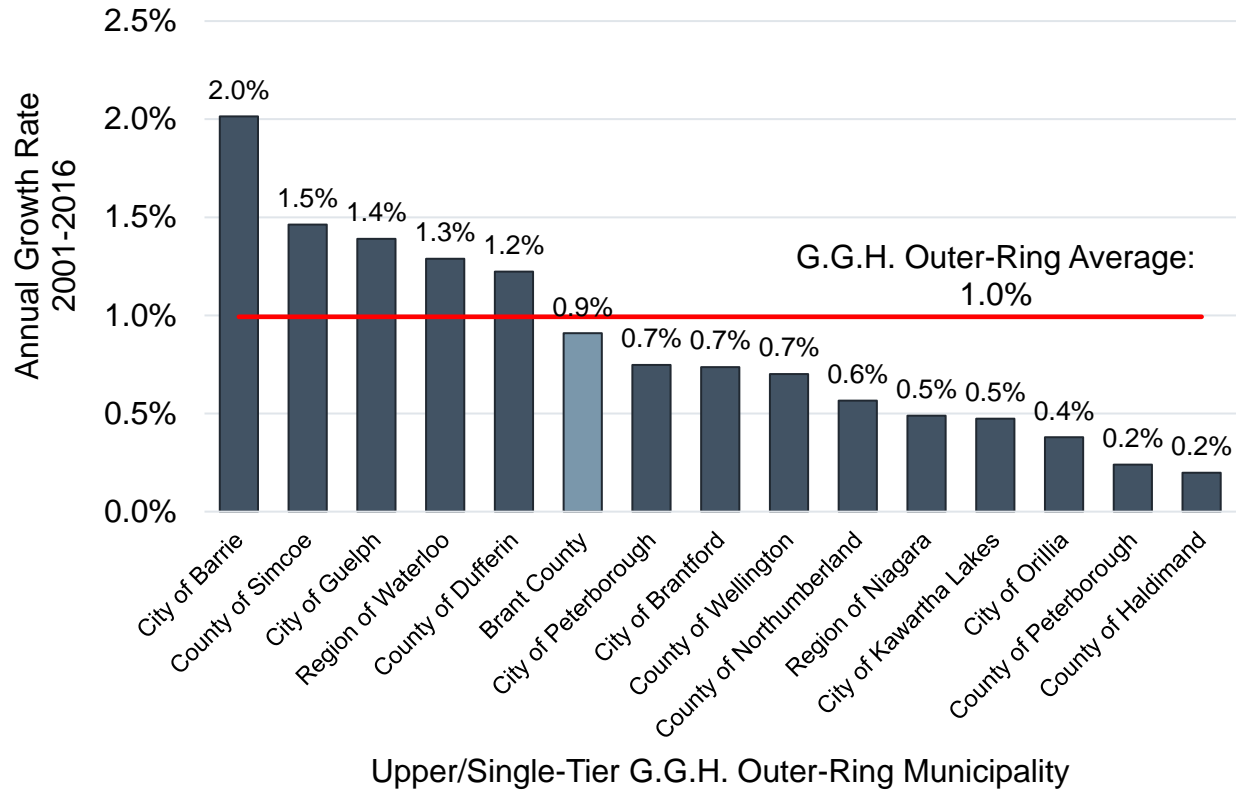




Figure 3-5
Outer-Ring G.G.H.
Historical Population, 2001 to 2016



Source: Derived from Statistics Canada Demography Division data by Watson & Associates Economists Ltd.

3.2.2 County of Brant and G.G.H. Historical Population Trends, 2001 to 2016

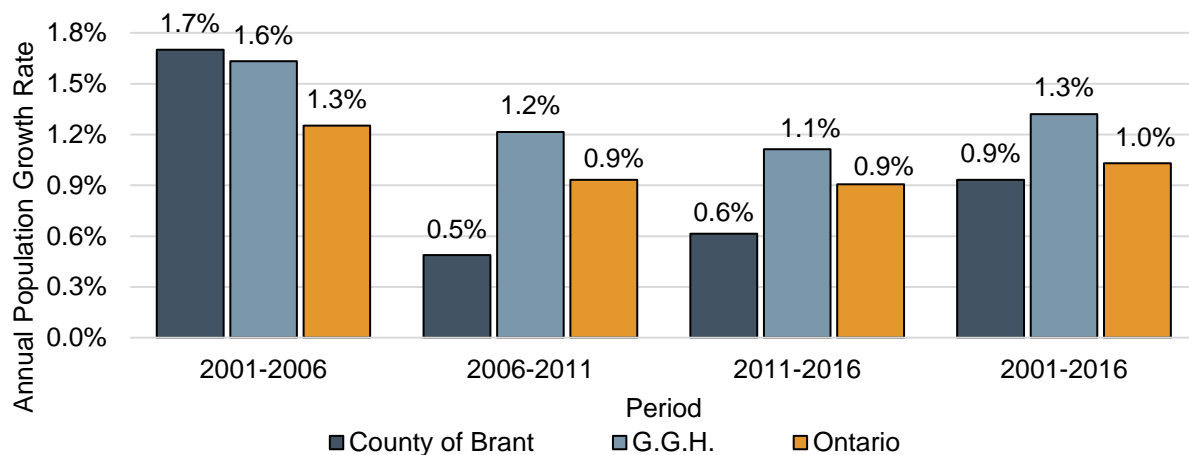
Figure 3-6 provides a summary of annual historical population growth rates for the County of Brant, the G.G.H., and the Province as a whole, over a 15-year period from 2001 to 2016. Key observations include the following:

- As previously indicated, the County of Brant experienced an annual population growth rate of 0.9% from 2001 to 2016. This is comparable to the provincial average of 1.0% but below the G.G.H. average of 1.3%;
- The annual population growth rate in the County of Brant of 1.7% from 2001 to 2006 was higher than the G.G.H. and provincial average rates, but the County's growth rate declined to 0.5% from 2006 to 2011. The broader area also



- experienced a decline during this time period as a result of the 2008/2009 global economic recession; however, it was more profound in the County of Brant; and
- Population growth rates over the most recent Census period (2011 to 2016) within the County of Brant (0.6%) have been below both the G.G.H. (1.1%) and the provincial average (0.9%).

Figure 3-6
County of Brant, G.G.H. and Ontario
Historical Population Growth Rate Trends, 2001 to 2016



Note: Population includes net Census undercount.

Source: County of Brant and Ontario derived from Statistics Canada Census and Annual Demographics Estimates data, and G.G.H. from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, August 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd.

3.2.3 County of Brant Trends in Total Population Age Structure

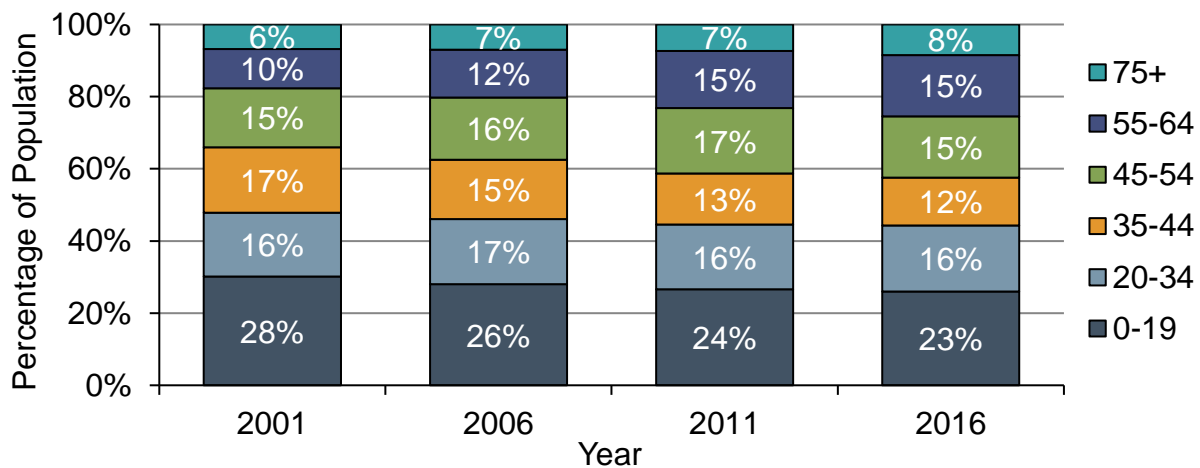
Figure 3-7 summarizes historical trends in population structure by major age group over the 2001 through 2016 period. Key observations regarding the County of Brant's historical population by age include the following:

- In 2016, the 0-19 age group (youth population) in the County of Brant accounted for 23% of the total population. Over the 2001 to 2016 period, the population in this age cohort decreased by 400, declining in population share from 28% to 23%;
- The County's young adult/adult population share (20-54 years of age) declined over the same period, comprising approximately 43% of the population in 2016:
 - The 20-34 age cohort (young adults), which comprised an estimated 16% of the population in 2016, remained stable in proportion from 16% in 2001;



- The percentage of the 35-44 age group decreased from 17% in 2001 to 12% in 2016; and
- The percentage of adults 45-54 years old accounted for 15% of the 2016 population, and remained stable at 15% in 2001;
- Collectively, the share of the County's 55+ population base increased significantly over the same period. More specifically:
 - The 55-74 age group (empty nesters/younger seniors) increased by 11 percentage points between 2001 and 2016, from 17% to 26%; and
 - The 75+ age group (older seniors) increased moderately from 6% in 2001 to 8% in 2016. Looking forward over the next three decades, the share of the County's population in the 75+ age group is anticipated to increase significantly, driven by the aging of the Baby Boom population. This is anticipated to place increasing demand on the need for seniors' housing, affordable housing, as well as social services to support the County's growing population base of seniors.

Figure 3-7
County of Brant
Population by Age Cohort, 2001 to 2016



Note: Population includes net Census undercount.

Source: Population forecast by age derived from 2001 to 2016 Statistics Canada Census and Annual Demographics Statistics data by Watson & Associates Economists Ltd.

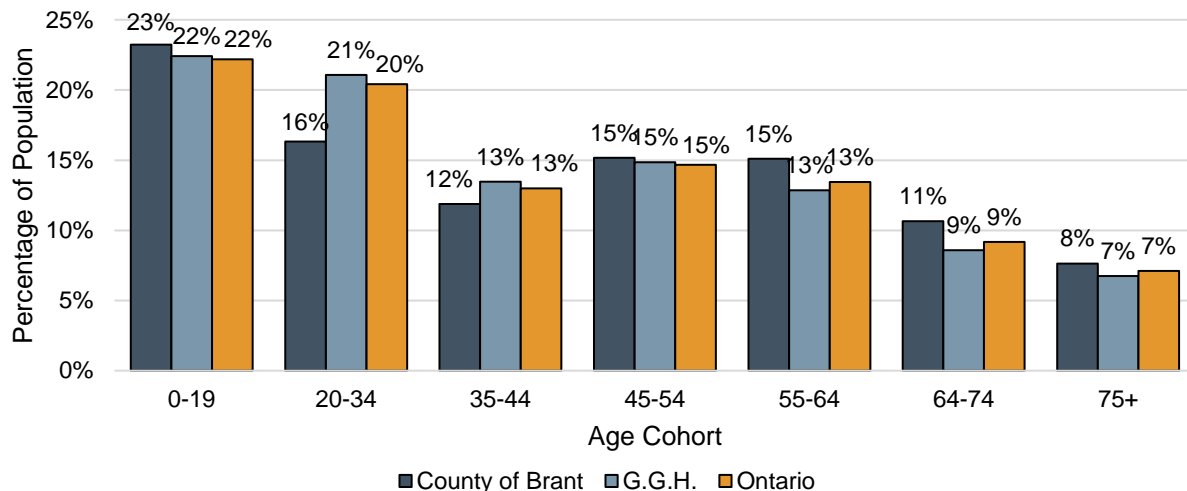
Figure 3-8 summarizes the 2016 population age structure in the County of Brant compared to the G.G.H. and the Province of Ontario as a whole. Key observations



regarding the County of Brant's historical population by age, in comparison to the G.G.H. and the Province, include:

- With the exception of the County's large youth population (ages 0-19), the County of Brant 2016 age structure is older than that of the G.G.H. and the provincial average;
- Comparatively, Brant County has a slightly higher share of youth population (0-19) relative to the G.G.H. and the provincial average;
- A lower proportion of the population in the County of Brant is concentrated in the 20-44 age group in comparison to the G.G.H. and the Province of Ontario as a whole; and
- The County of Brant has a higher proportion of adults over the age of 55, when compared to the G.G.H. and the Province of Ontario.

Figure 3-8
County of Brant,
G.G.H. and Ontario Population by Age Cohort, 2016



Note: Population includes net Census undercount.

Source: Derived from Statistics Canada Census and Annual Demographics Estimates data by Watson & Associates Economists Ltd.

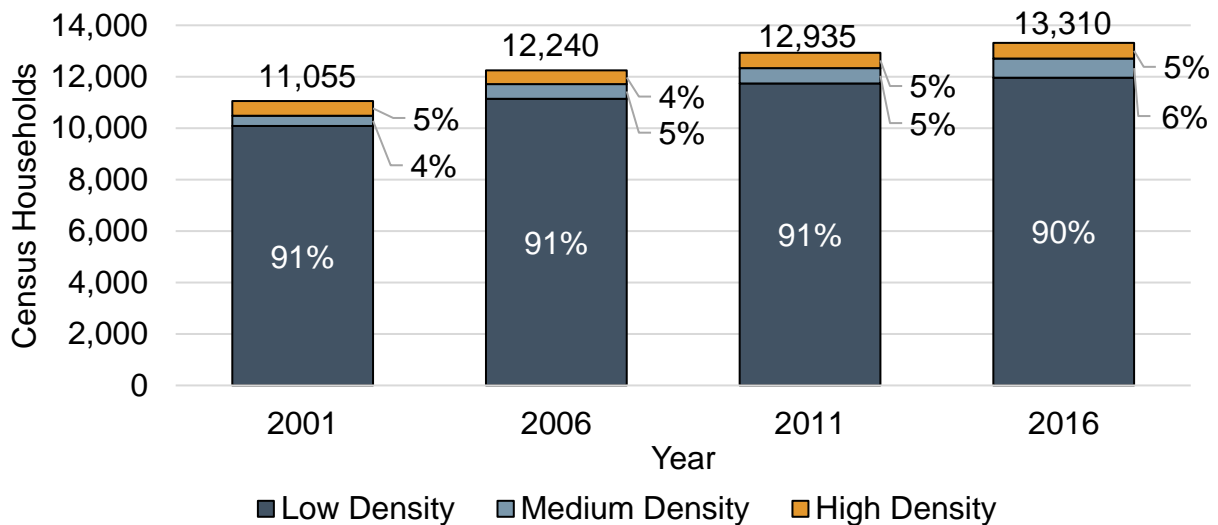
3.2.4 Historical Census Housing Trends, 2001 to 2016

Similar to population growth trends, the County of Brant has recently experienced a steady rate of housing growth, as measured by Statistics Canada Census data between 2001 and 2016. During this historical period, the County's housing base has increased by approximately 2,250 households from 11,060 to 13,310, which represents an



increase of approximately 150 Census housing units per year. Figure 3-9 and Figure 3-10 summarize housing growth by density type between 2001 and 2016. As previously discussed, low-density households largely include single and semi-detached units, townhouses and apartments in duplexes comprise medium-density households, while apartments are included in the high-density category. Historically, low-density housing has made up the majority of new housing development over the 2001 to 2016 period (at 82% of Census housing growth). Over the next 30 years, it is anticipated that housing development within the County will be increasingly concentrated in medium- and high-density forms, largely driven by needs related to housing affordability and the aging of the County's population base.

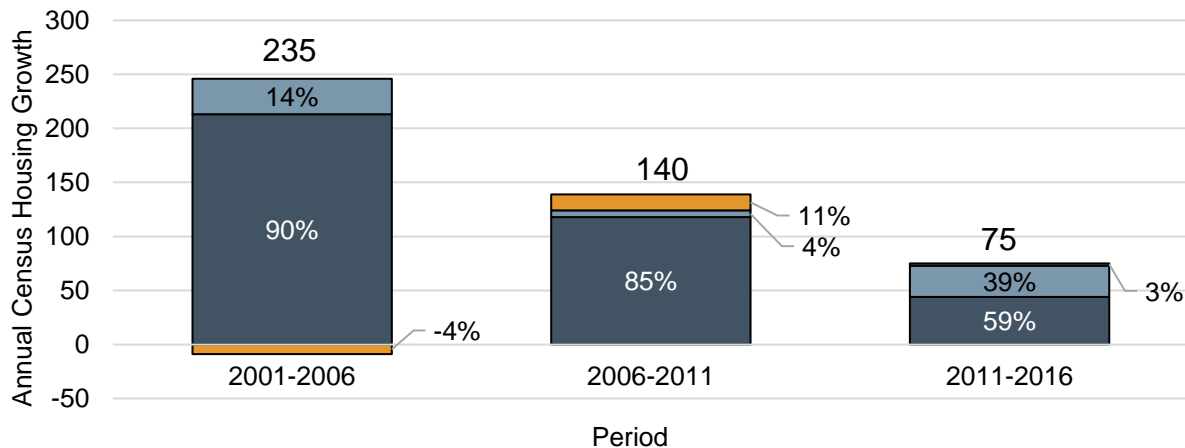
Figure 3-9
County of Brant
Historical Number of Households, 2001 to 2016



Low density includes single detached and semi-detached units.
Medium density includes townhouses and apartments in duplexes.
High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Census, 2001 to 2016, by Watson & Associates Economists Ltd.



Figure 3-10
County of Brant
Historical Share of Annual Housing Growth by Type, 2001 to 2016



■ Low Density ■ Medium Density ■ High Density

Low density includes single detached and semi-detached units.

Medium density includes townhouses and apartments in duplexes.

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

Source: Derived from Statistics Canada Census, 2001 to 2016, by Watson & Associates Economists Ltd.

3.2.5 Housing Occupancy Trends within the County of Brant

3.2.5.1 Household Headship Rates

A household headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e., cohort). Between 2001 and 2016, the County of Brant's total headship rate increased modestly from 33.6% to 35.2% (refer to Appendix A for additional details). An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age, family type and family structure. 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. Accordingly, forecast trends in population age structure provide important insights into



future headship rates and average P.P.U. trends for the County of Brant, which is further discussed below. It is important to note that headship rates by major age group are anticipated to remain relatively stable over the long-term forecast period.

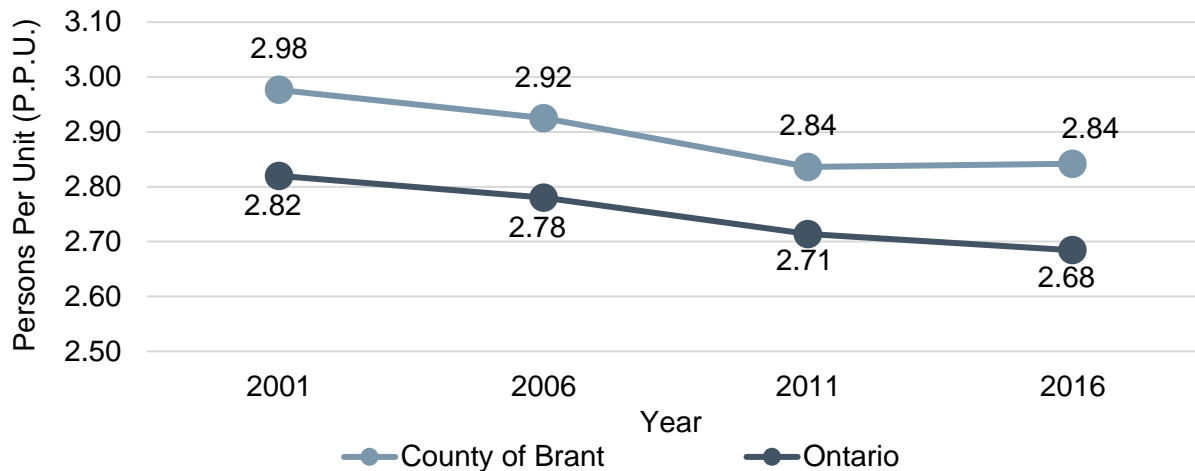
3.2.5.2 *Persons Per Housing Unit (P.P.U.)*

Figure 3-11 summarizes trends in average housing occupancy for the County of Brant and the Province of Ontario over the 2001 to 2016 period, expressed as the average number of P.P.U. Trends in household occupancy and age structure are a particularly important statistic for land-use planners, as these trends have broad implications for the amount and type of future housing needs associated with population growth as well as demands for public infrastructure, municipal services and schools. Key observations include the following:

- Average housing occupancy levels for the Province as a whole were lower relative to the County of Brant;
- The average P.P.U. for the County of Brant steadily declined over the 2001 to 2016 period, however, from 2011 to 2016, the County's average P.P.U. stabilized at 2.84. In contrast to the County of Brant, the average P.P.U. for the Province decline between 2011 and 2016;
- The recent trend toward greater stabilization in average household occupancy within the County of Brant is largely believed to be a result of increased residential development activity in the County, particularly new homes geared to families. It is further noted that potential delays in adult children leaving home, largely due to rising housing ownership and housing rental costs, are estimated to have caused upward pressure on average P.P.U. during the 2016 to 2021 period. Lastly, an increase in multi-family (i.e., multi-generational) dwellings is also believed to be driving this trend. These trends have also been observed across many other G.G.H municipalities, most notably the more populated, urbanized municipalities within the G.T.H.A.; and
- The average P.P.U. for the County of Brant is forecast to continue to decline over the longer term. This decline, however, is anticipated to occur at a much slower rate relative to historical trends, primarily as a result of strong net migration associated with young adults anticipated over the forecast period (particularly over the next 10 to 15 years).



Figure 3-11
County of Brant
Historical Persons Per Unit (P.P.U.) Trends, 2001 to 2016



Note: Population used to calculate persons per unit includes the net Census undercount.
Source: Derived from Statistics Canada Census and Annual Demographics Estimates, 2001 to 2016, by Watson & Associates Economists Ltd.

3.2.5.3 Housing Propensity by Age Structure

Figure 3-12 summarizes historical housing propensity (i.e., demand) trends by structure type for Census households (private dwellings occupied by usual residents) in the County of Brant based on 2016 Statistics Canada Census data (additional details regarding forecast age-specific housing propensity as of 2051 are provided in Appendix B). Age-specific propensities measure housing demand by dwelling structure type, by age of household maintainer.

The socio-economic characteristics of the County's population related to income/affordability, lifestyle, family size, lifestyle decisions, health and mobility vary by population age, which in turn, influences the demand for housing by structure type. As illustrated in Figure 3-10, propensities for low-density housing (single detached and semi-detached) are high among all age groups, particularly over the age of 25. Propensities for high-density housing (apartments) are highest among the under 25 age group at 23%, followed by the over 23-34 and 75+ age groups.

As previously mentioned, the County of Brant's population is aging and the 55+ age group has grown considerably over the past 15 years. Looking forward, the percentage of seniors, particularly the 75+ age group, within the County of Brant is expected to



increase in both percentage and absolute terms over the next several decades. As the average age of the County of Brant's population continues to increase, it is anticipated that the demand for higher-density housing forms will also continue to steadily increase.

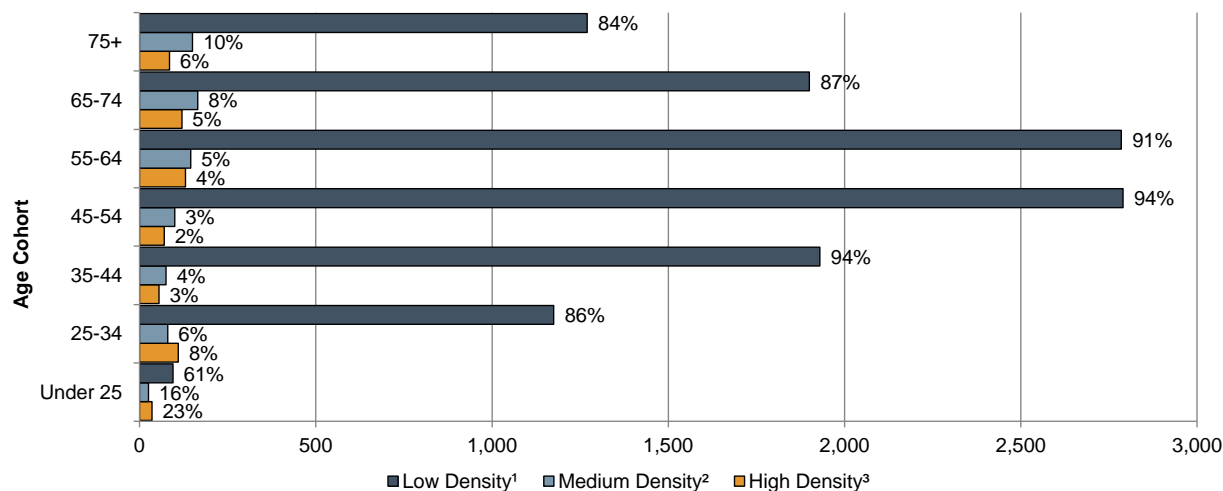
Within the 55+ age group, housing demand related to the 55-74 age group is anticipated to be relatively stronger for ground-oriented housing forms (i.e., single detached, semi-detached and townhouses) that provide proximity to urban amenities, municipal services and community infrastructure. With respect to the 75+ age group, the physical and socio-economic characteristics of this age group (on average) are considerably different than those of younger seniors, empty nesters and working adults with respect to income, mobility, and health. Typically, these socio-economic and physical characteristics represent a key driver behind the higher propensity from this age group for medium- and high-density housing forms (including seniors' housing) that are in proximity to urban amenities, health care services and other community facilities.

It is important to note that the growth in high-density housing presented in this section relates to private dwellings occupied by usual residents and does not include the population living in collective dwellings. Over the next 30 years, the rate of population growth associated with collective dwellings is anticipated to steadily increase relative to historical trends largely due to demand from the 75+ age group. The 75+ age group is anticipated to represent the fastest growing age group across the County of Brant, placing demands on accommodations such as seniors' housing (including nursing homes, assisted living, and long-term care homes), which in many cases are not categorized by Statistics Canada as private dwellings occupied by usual residents.

The County of Brant is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Accordingly, opportunities should be explored to provide a mix of future housing across a range of density types to accommodate those with varying levels of income (including affordable housing options) within the D.G.A. as well as in the B.U.A. across the County.



Figure 3-12
County of Brant
Propensity by Structure Type, 2016



¹ Includes singles and semi-detached units.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: Data from Statistics Canada 2016 Census by Watson & Associates Economists Ltd.

The housing propensity analysis, summarized above in Figure 3-12, does not provide insight with respect to housing demand by structure during the post-2016 period. As such, it is recognized that this data represents one historical information source in developing long-term assumptions regarding forecast housing growth by structure type, but it should also be supported by a thorough review of more recent and forward-looking data sources, which are discussed below.

Considering trends in housing demand by structure type over the past 10 years, it is observed that the housing market is already transitioning from low-density units to an increasingly higher share of medium-density units. As further noted in Figure 3-14, during the 2016 to 2020 period, 28% of residential building permits issued within the County of Brant were for medium- and high-density households. Comparatively, between 2011 and 2015, 25% of new residential building permits issued in the County of Brant were for medium- and high-density dwellings.

It is noted that an extrapolation of constant 2016 housing propensity rates by population age group may not generate an accurate near-term or longer-term forecast of housing demand by structure type. As such, consideration should be given to both historical trends and anticipated changes in housing propensity rates by population age group



when considering long-term housing demand by structure type. Figure 3-13 summarizes recent building permit data from 2016 to 2020 compared to the housing mix by structure type, as derived from the housing propensity analysis, using fixed propensity rates as per Statistics Canada 2016 Census data. Over the 2016 to 2020 forecast period, the fixed rate housing propensity analysis approach delivers a projection of 14% new households in the form of medium- and high-density units. In contrast, actual 2016 to 2020 residential building permit activity (new units only) indicates that the share of total units issued for medium- and high-density units was approximately double (28%), with a much stronger emphasis on demand for medium-density housing.

Figure 3-13
County of Brant
Housing Propensity Analysis by Structure Type, 2016 to 2021 vs. Residential Building Permit Data, 2016 to 2020

Housing Type	Total			Share		
	2016-2021 Propensity Forecast	2016-2020 Building Permits	Difference	2016-2021 Propensity Forecast	2016-2020 Building Permits	Difference
Low Density	1,040	1,210	-170	87%	72%	-15%
Medium Density	90	400	-310	8%	24%	16%
High Density	70	70	0	6%	4%	-2%
Total	1,196	1,680	-484	100%	100%	0%

Note: Figures have been rounded. An adjustment factor has been applied between building permit issuance and occupancy in the propensity forecast, taking into account Census housing growth vs. building permit issuance. This is largely as a result of the significantly higher rate of building permit growth between 2018 and 2021 for units which are not expected to be occupied by the 2021 Census.

Propensity forecast is based on 2016 propensity rates by age group and housing structure type.

Multiple dwellings include rows and apartments in duplexes.

Apartments include bachelor, 1 and 2+ bedroom rental and condo apartments.

Source: Watson & Associates Economists Ltd.

Comparing actual residential building permit activity between 2016 and 2020 in the County of Brant to the near-term (2016 to 2021) housing forecast by structure type using a fixed propensity rate analysis (in this case based on 2016 Census data), highlights the limitations of this approach when projecting forecast housing by structure type. Looking forward over the next decade and beyond, it is anticipated that the share of medium- and high-density housing activity will steadily increase. It is noted that 35% of housing units in the development approvals process are medium and high density, which is further discussed in section 3.2.9. The results of the 2021 Census will also be helpful in further understanding recent trends in housing propensity by age.



A housing propensity analysis by population age and housing structure type represents a useful starting approach in developing long-term assumptions regarding forecast housing growth by structure type. In addition to population age structure, however, there are a number of factors such as household income, housing demand by tenure (i.e., rental vs. ownership housing), housing affordability, lifestyle decisions, health, mobility, and planning policy, which also influence the built form and type of housing units constructed across the County of Brant. While the influence of these other socio-economic variables on the Region's future housing needs by structure type can be explored and tested to varying degrees, these impacts cannot be easily isolated when assessing the County's future housing needs.

In addition to exploring a housing propensity analysis using baseline Census data, it is recommended that forecast housing propensity rates and corresponding housing demand by structure type are annually monitored using a range of data sources. Such data sources should include, but would not be limited to, recent residential building permit activity/housing completions, active residential development applications, postcensal migration trends, trends in housing demand by tenure, trends in housing affordability, impacts of major infrastructure investments as well as planning policy and economic development initiatives.

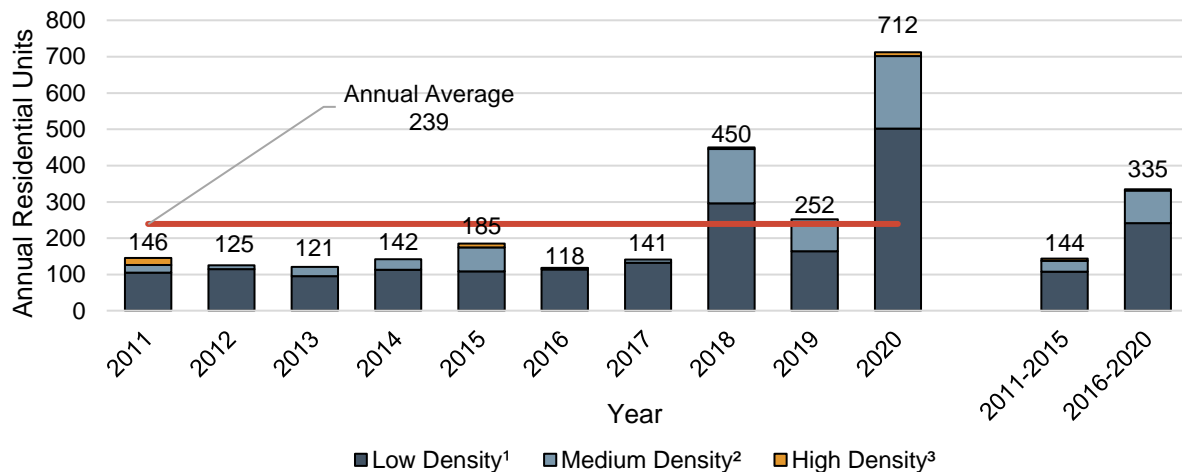
3.2.6 Housing Development Trends

Figure 3-14 summarizes total residential building permits by structure type from 2011 to 2020 for the County of Brant. Key observations include:

- The number of units from residential building permits (new units only) issued for the County of Brant between 2011 and 2020 averaged 239 units per year;
- The average number of units from residential building permits increased from 2015, averaging 335 units annually over the 2016 to 2020 period; and
- The average number of units from building permits issued for medium-density housing units increased over the past three years, representing nearly one-third of all units from residential permits issued.



Figure 3-14
County of Brant
Residential Building Permit Activity by Housing Type (New Units Only),
2011 to 2020



¹ Includes singles and semi-detached units.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: 2011 to 2018 and 2020 historical building permit data provided by the County of Brant, and 2019 from Statistics Canada, by Watson & Associates Economists Ltd.

3.2.6.1 Supply of Potential Housing Units on Vacant Lands

The County's active development application data was reviewed to provide insight into the demand for residential housing units by structure and timing of development. Figure 3-15 provides a summary of potential residential development on vacant lands within the County of Brant. The County's potential housing supply includes potential housing development that is approved/draft approved (registered unbuilt/draft approved), development that is under review or proposed, and remaining vacant lands with no applications. Throughout the County, low-density housing comprises a large share of the housing potential, at approximately 65%, followed by medium-density housing at 13% and high-density housing at 22%.

With respect to housing potential that is approved and within active applications (draft approved and proposed), which provides an indication of shorter-term housing demand, the County has a supply total of approximately 9,108 housing units. Of these, approximately 65% is low density, followed by medium density at 13%, and high density



at 22%. Housing potential within active development applications suggest a trend towards a wider range of housing types compared to historical trends.

Figure 3-15
County of Brant
Housing Potential on Vacant Lands by Status as of Year-End 2020

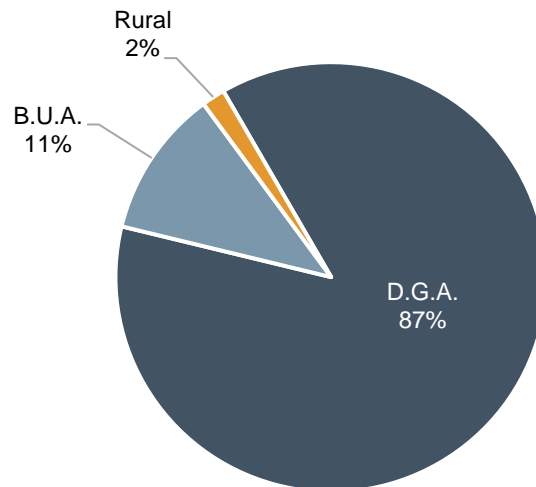
Stage of Development	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units	Total Housing Unit Share
Registered Unbuilt	1,230	534	770	2,434	26%
Draft Approved	3,036	606	1,009	4,651	48%
Proposed	1,619	83	221	1,923	20%
Sub-Total	5,885	1,223	2,000	9,108	94%
Share (%)	65%	13%	22%	100%	
Other Vacant Designated Lands (no application)	468	0	144	612	6%
Total	6,353	1,223	2,114	9,720	100%
Share (%)	65%	13%	22%	100%	

Source: Based on County of Brant data as of December 2020.

Figure 3-16 provides a summary of housing potential on vacant lands by policy area (B.U.A., D.G.A. and Rural Area). As summarized, the majority (87%) of future housing supply potential is within the D.G.A. The B.U.A. represents approximately 11% of the housing unit potential, comprising 43% low density, followed by high density at 32% and medium density at 25%. The Rural Area is estimated to comprise 2% of the housing potential within the County, or approximately 170 potential dwelling units. It is important to note that the housing potential within the Rural Area excludes a review of severance potential. Further details regarding housing potential by Urban Settlement Area and Rural System is provided in Chapter 4, Population and Housing Allocations to 2051.



Figure 3-16
County of Brant
Housing Potential on Vacant Lands by Policy Area,
Year-End 2020



Source: Based on County of Brant data as of December 2020, by Watson & Associates Economists Ltd.

3.2.6.2 Trends in County of Brant and Comparator G.G.H. Municipalities' Housing Prices, 2010 to 2020

Economic conditions and housing prices play key roles in shaping housing development trends. Over the past two decades, the G.G.H. has experienced a steady increase in housing prices driven by a number of factors including rising land prices, steady immigration, and strong population growth, as well as a robust employment market. Generally, strong fundamentals associated with the Canadian economy have also attracted a steady stream of local and foreign investment to the G.G.H. real estate market. The current low interest rate environment has also enabled the appreciation of residential real estate values, as buyers have benefitted from access to low interest rate mortgages. Most recently, the coronavirus disease (COVID-19) pandemic has accelerated housing price appreciation since mid-2020, most notably in the Province's smaller urban communities and rural areas.

Figure 3-17 summarizes historical trends in average housing sale prices for the County of Brant and several G.G.H. municipalities for single detached dwelling units between 2010 and 2020. Housing price data for townhouses and condominiums is also provided for 2020, where available. Across the G.G.H., housing prices for new single detached units vary considerably, with average prices highest in the G.T.H.A. municipalities of



Mississauga, Burlington, and Oakville. Comparatively, the average price of a single detached house is significantly lower in the City of Hamilton within the G.T.H.A. context. Average housing prices for new single detached houses within the County of Brant fall in the bottom half of the range relative to the comparator municipalities. With respect to housing appreciation for new single detached units, Burlington and Mississauga have experienced the strongest average annual growth rate over the past 10 years, with the municipalities of Milton, Guelph, Cambridge, and Brantford following in this regard. The County of Brant has experienced a relatively low rate of annual housing price appreciation for new single detached units over the last decade. As previously noted, however, recent housing price appreciation in the County of Brant has significantly accelerated across all housing types over the past year (refer to section 3.3.2 for further details).



Figure 3-17
G.G.H.
Historical Trends in Housing Prices

Municipality	New Single Detached Price, 2010	New Single Detached Price, 2020	Townhouse Price, 2020	Condominium Price, 2020	Annual Increase in New Single Detached Housing Unit, 2010-2020
City of Burlington	\$602,800	\$2,297,800	\$760,500	\$521,400	14%
City of Mississauga	\$784,400	\$2,780,400	\$833,700	\$533,800	13%
Town of Milton	\$441,100	\$1,078,200	\$731,100	\$523,500	9%
City of Guelph	\$372,700	\$907,900	\$447,300	\$369,100	9%
City of Cambridge	\$338,200	\$774,900	\$425,500	\$503,200	9%
City of Brantford	\$285,200	\$645,300	\$330,400 ¹	\$275,800 ¹	9%
Town of Oakville	\$958,700	\$2,143,700	\$915,200	\$646,000	8%
Town of Caledon	\$561,000	\$1,092,400	\$753,000	-	7%
City of Kitchener	\$388,700	\$751,300	\$416,100	\$314,900	7%
City of Waterloo	\$468,700	\$870,900			6%
City of Brampton	\$483,200	\$868,300	\$721,600	\$461,500	6%
City of Hamilton	\$422,700	\$636,200	-	-	4%
County of Brant	\$538,500	\$675,500	\$330,400 ¹	\$275,800 ¹	2%

¹ County of Brant and City of Brantford townhouse and condominium price data is the same and from the Brantford Regional Real Estate Association. Data includes the rural areas and communities in Brant County, which includes the City of Brantford; and urban areas of Paris, Burford, Mount Pleasant, Oakland, Scotland and St. George.

Source: Watson & Associates Economists Ltd. Data for average single detached prices based on the average price of new single detached units derived from Canada Mortgage Housing Corporation (CMHC), Housing Market Absorption Survey. Townhouse and condominium prices for the City of Guelph, City of Cambridge, City of Kitchener, City of Waterloo, County of Brant and City of Brantford derived from Canadian Real Estate Association MLS HPI data. Townhouse and condominium prices for the City of Burlington, Town of Milton, Town of Oakville, City of Mississauga, City of Brampton, and Town of Caledon derived from TREB Market Watch reports.

3.2.6.3 Average Household Income

Figure 3-18 summarizes average household income growth for the County of Brant and the Province of Ontario between 2000 and 2015. Key observations are as follows:

- As of 2015, the estimated average household income in the County of Brant was \$105,100, which is higher compared to the average household income for the Province of Ontario; and



- The annual rate of household income growth for the County of Brant has decreased over the past five years relative to the previous ten years. Overall household income growth over the past 15 years in the County has been higher relative to the Province of Ontario.

Figure 3-18
County of Brant and Province of Ontario
Average Household Income, 2001 to 2016 Census Years

Census Year	County of Brant Average Household Income	Province of Ontario Average Household Income
2001	\$67,600	\$66,800
2006	\$79,900	\$78,000
2011	\$94,500	\$85,800
2016	\$105,100	\$97,900
Census Year	County of Brant Average Household Income Annual Growth	Province of Ontario Average Household Income Annual Growth
2001-2006	\$2,450	\$2,240
2006-2011	\$2,920	\$1,560
2011-2016	\$2,110	\$2,420
Census Year	County of Brant Average Household Income Annual Growth Rate	Province of Ontario Average Household Income Annual Growth Rate
2001-2006	3.4%	3.1%
2006-2011	3.4%	1.9%
2011-2016	2.1%	2.7%

Note: Census year income shown is for previous year (e.g., 2001 to 2016 is 2000 to 2015 income).

Source: 2001 to 2016 data derived from Statistics Canada Census and NHS by Watson & Associates Economists Ltd.

Average household income growth has not kept pace with rising housing prices. As a result, housing affordability has been steadily eroded over the past decade across the G.G.H., most notably within the larger urban centres of the G.T.H.A. There is a need to ensure that sufficient opportunities exist within the County of Brant (and across the G.G.H. in general) to accommodate a broad range of housing types (i.e., ground



oriented and high density) for all household income levels, including market, affordable, assisted and emergency housing.^{1, 2, 3}

3.3 County of Brant Population and Housing Forecast to 2051

3.3.1 Population and Employment Growth Outlook for the Greater Golden Horseshoe, 2016 to 2051

A key driver of the County of Brant's future economic potential is its geographic location within Ontario. The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of approximately 5.3 million people (153,000 annually), or 1.3% annually between 2016 and 2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase from 4.6 million in 2016 to 7.0 million in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051.

The G.G.H. represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The industrial and office commercial real estate markets within the G.G.H. 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 G.G.H. is highly attractive to new businesses and investors on an international level. The G.G.H. 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 United States (U.S.) border. In turn, this continues to support steady population and

¹ Affordable housing as defined in the P.P.S., 2020, p. 39.

² Assisted housing refers to housing that is available to low- and moderate-income households for rent or purchase where part of the housing cost is subsidized through a government program.

³ Emergency housing refers to shelters, supportive housing, transitional housing, etc.



housing growth within this region, largely driven by international and inter-provincial net migration to the area.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. As illustrated in Figure 3-19, due to its geographic location within the western region of the G.G.H. Outer Ring, Brant County is forecast to experience significant outward growth pressure over the next several decades largely from G.T.H.A. municipalities in the west and north, which have historically been amongst the fastest growing municipalities in Ontario in recent decades.

Figure 3-19
G.G.H.
County of Brant within the Context of the G.G.H.

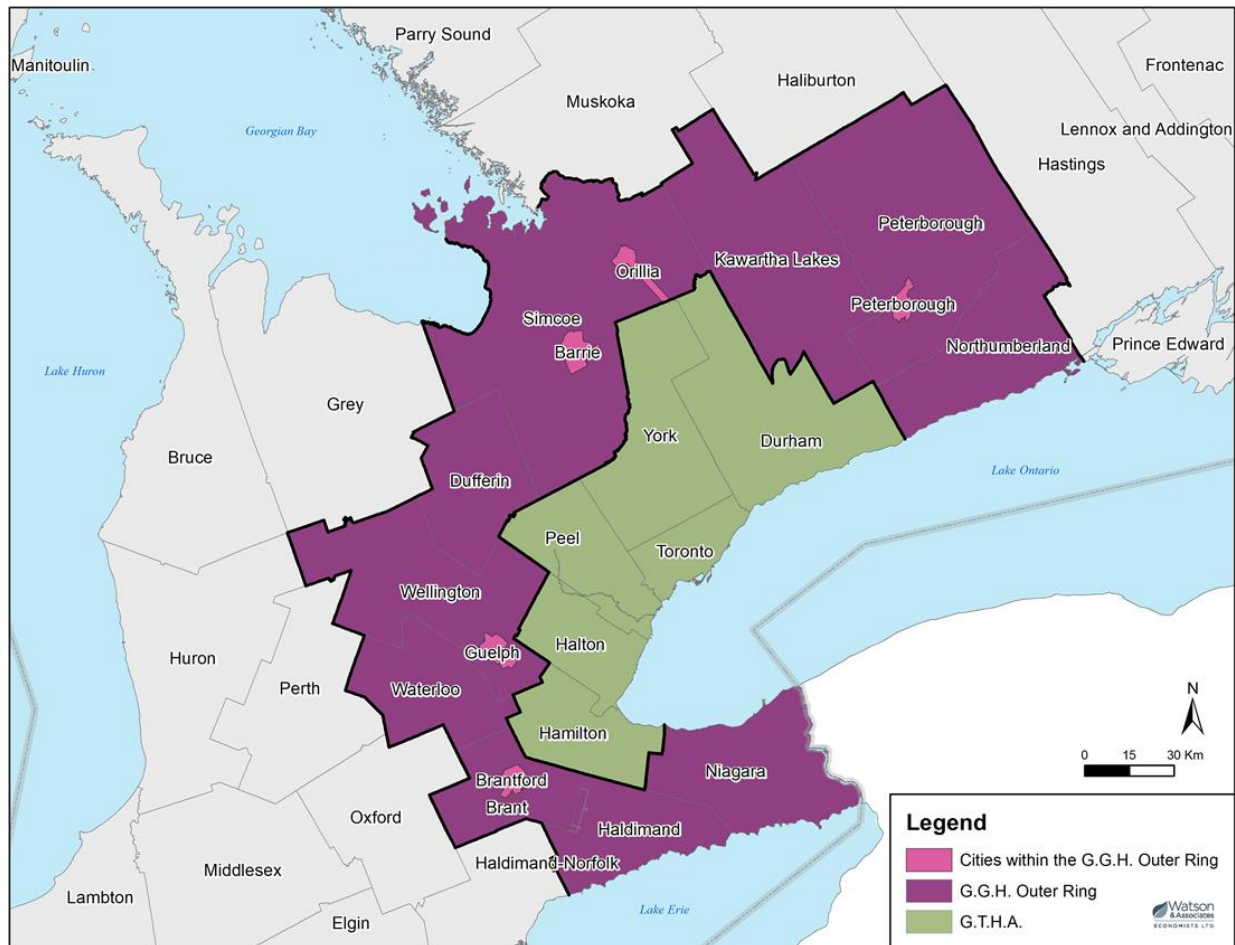


Figure 3-20 through to Figure 3-22 summarize the historical and long-term population employment growth forecast for the G.G.H. between the G.T.H.A. and the G.G.H. Outer



Ring. Figure 3-20 and Figure 3-21 identify that the G.T.H.A. has historically experienced a higher rate of population and employment relative to the G.G.H. Outer Ring over the 2001 to 2016 period. Looking forward, forecast annual population and the employment growth rate of the G.G.H. Outer Ring are anticipated to increase significantly, driven by continued outward growth pressure from the G.T.H.A. and steady net migration. In fact, the forecast annual rate of employment growth in the G.G.H. Outer Ring is expected to exceed that of the G.T.H.A. between 2016 and 2051.

Figure 3-20
G.G.H.
Historical and Forecast Population Growth
2001 to 2051

Area	2001 Population	2016 Population	2051 Population	2001 to 2016 Total Population Growth	2001 to 2016 Annual Population Growth Rate	2016 to 2051 Total Population Growth	2016 to 2051 Annual Population Growth Rate
G.T.H.A.	5,808,000	7,183,000	11,172,000	1,375,000	1.4%	3,989,000	1.3%
G.G.H. Outer Ring	2,046,000	2,355,000	3,703,000	309,000	0.9%	1,348,000	1.3%
Total G.G.H.	7,854,000	9,538,000	14,875,000	1,684,000	1.3%	5,337,000	1.3%

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. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.

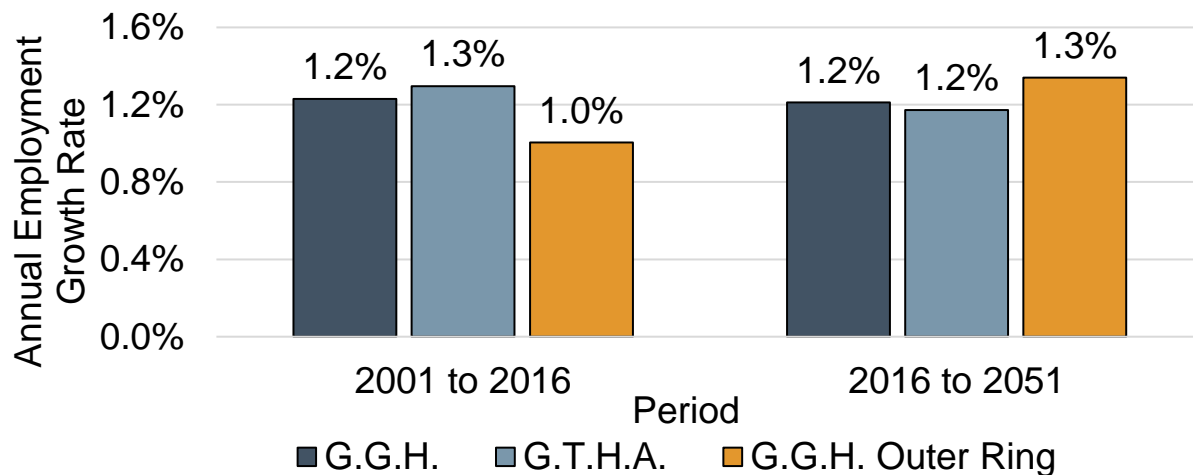
Figure 3-21
G.G.H.
Historical and Forecast Employment Growth
2001 to 2051

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

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. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.



Figure 3-22
G.G.H.
Historical and Forecast Annual Employment Growth Rate
2001 to 2051



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. Ontario.ca/growth planning. Derived by Watson & Associates Economists Ltd.

3.3.2 Near-Term Impacts of COVID-19 on Population Growth and Longer-Term Impacts on the Economy and the Real Estate Market in the County of Brant

Since being declared a pandemic by the World Health Organization (W.H.O.) on March 12, 2020, the economic impacts of COVID-19 on global economic output have been significant. Economic sectors such as travel and tourism, accommodation and food, manufacturing, and energy have been hit particularly hard. On the other hand, many other employment sectors (particularly knowledge-based sectors), which are more adaptable to the current remote work environment, have been less negatively impacted and in some cases have prospered.

Canada's gross domestic product (G.D.P.) annualized growth rate declined by approximately 39% in the second quarter of 2020 (April to June) due to COVID-19. As restrictions gradually loosened during that period, beginning in May 2020, businesses



came out of lockdown during the summer months and economic activity grew at a pace of 40.6% in the third quarter, although G.D.P. was still short of pre-pandemic levels.^{1, 2}

Economic growth continued through to the fourth quarter of 2020 at an annualized rate of 9.6% despite increased COVID-19 restrictions towards the end of November 2020. Despite this fourth quarter increase, real G.D.P. in 2020 declined overall by 5.4%.³ Heading into 2021, Canada's economy grew sharply by 5.6% in the first quarter, but due to the impacts of the third COVID-19 wave in April 2021, the Province-wide lockdown has weighed on economic activity in the second quarter of 2021. Given the strong performance leading up to April 2021, it is expected that any setbacks due to the lockdown will be quickly recouped once restrictions ease.^{4, 5}

Overall, required modifications to social behavior (e.g., 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, continued tensions, logistical challenges and constraints related to international trade have also begun to raise further questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

At present, the level of sustained economic impact related to this “exogenous shock” to the world and the Canadian economy is still relatively uncertain. While the prospects for a global recovery have improved in recent months, the pace of this global economic recovery has been uneven, largely due to the rate at which countries have been able to vaccinate their residents.⁶

Despite the near-term consequences of COVID-19, particularly related to immigration as well as businesses in the retail, travel and tourism sector, the long-term economic and housing outlook for the G.G.H. remains positive as the region continues to be

¹ Reuters Business News, August 28, 2020.

² CBC Business News, 2020 was the worst year on record for Canada's economy. It shrank by 5.4%, March 2, 2021.

³ Ibid.

⁴ Ontario Newsroom, Office of the Premier, Ontario Declares Second Provincial Emergency to Address COVID-19 Crisis and Save Lives, January 12, 2021.

⁵ Financial Post, Canada's economy posts 5.6% annualized growth in Q1, June 1, 2021.

⁶ Global Government Forum. OECD Warns of Uneven Economic Recovery from COVID-19, Despite Global Growth. June 1, 2021.



attractive to international investment and newcomers alike. While the housing market across the G.G.H. experienced a slow start in early 2020 due to COVID-19, pent-up demand and historically low mortgage rates have accelerated housing demand across the G.G.H., particularly in the Outer Ring, with record sales and higher average selling prices. Since the beginning of the COVID-19 pandemic in early 2020, outward growth pressure from the G.T.H.A. to the G.G.H. Outer Ring has accelerated. According to the Brantford Regional Real Estate Association (B.R.E.A.A.), the average selling price across the Brant County Region in 2020 was \$591,600, up by approximately 32% from 2019, and prices have continued to increase reaching a high of \$718,800 in February 2021. Housing sales are also up by nearly 12% in 2020 compared to 2019, with continued strong sales in early 2020.^{1, 2}

Notwithstanding the recent positive real estate trends identified for the G.G.H. as a whole, the G.G.H. Outer Ring, and the County of Brant, there are a number of factors to remain cautious about with respect to the broader demand for housing over the near term (i.e., the next one to three years). Reduced immigration levels in 2020 and expected lower levels in 2021 are anticipated to slow population growth to the G.G.H. and the County of Brant, potentially placing downward pressure on housing market demand if domestic demand slows (refer to section 3.3.3).³ Tighter mortgage rules could also temper the hot real-estate market as home buyers would face stiffer mortgage stress tests. The Governor of the Bank of Canada has warned that houses who have overextended on their mortgages are vulnerable to rising interest rates when they must be renewed, and not to expect the rapid price increase to continue indefinitely.⁴

These above-mentioned factors have the potential to reduce population growth levels and soften the housing market in areas of Ontario where population growth is most

¹ The B.R.E.A.A. represents the Brant County Region which includes the rural areas and communities in the Brant County Census Division. This includes the City of Brantford; and urban areas of Paris, Burford, Mount Pleasant, Oakland, Scotland and St. George.

² Brantford Regional Real Estate Association, 2020 and 2021 year-to-date February statistics.

³ "Very difficult" to meet Canada's immigration targets after pandemic drop: immigration lawyer. CTV News. January 14, 2021.

⁴ CTV Business News, Mortgage stress tests set to tighten in wake of Bank of Canada warnings, May 20, 2021.



heavily dependent on immigration. Among G.G.H. municipalities, the City of Toronto, Peel Region, and York Region could potentially be the most heavily impacted by such a trend, while the remaining “905” area of the G.T.H.A. and the G.G.H. Outer Ring, including the County of Brant, which is more dependent on inter-provincial and intra-provincial net migration as a source of housing demand, may potentially be less impacted.

In addition to its 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 taking place prior to the pandemic. Businesses 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. 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 to consider the manner in which these impacts are likely to influence the nature of employment by type, as well as by place of work. These factors are further discussed in Chapter 6.

As of 2016, approximately 13% of the County of Brant workforce is identified as working from home on a full-time basis. The percentage of workers who reported having no fixed place of work (N.F.P.O.W.) in 2016 was 14%.^{1,2} It is anticipated that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will steadily increase over the long term. As this percentage continues to steadily rise, it may reduce the relative need for future commercial and institutional building space associated with the employment forecasts set out in Schedule 3 of the Growth Plan.

¹ Work at home and N.F.P.O.W. employment derived from 2001 and 2016 Statistics Canada Census data.

² Statistics Canada defines N.F.P.O.W. employees as “persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”



3.3.3 Near-Term Immigration Levels for Canada are Likely to Remain Below Historical Averages Due to COVID-19

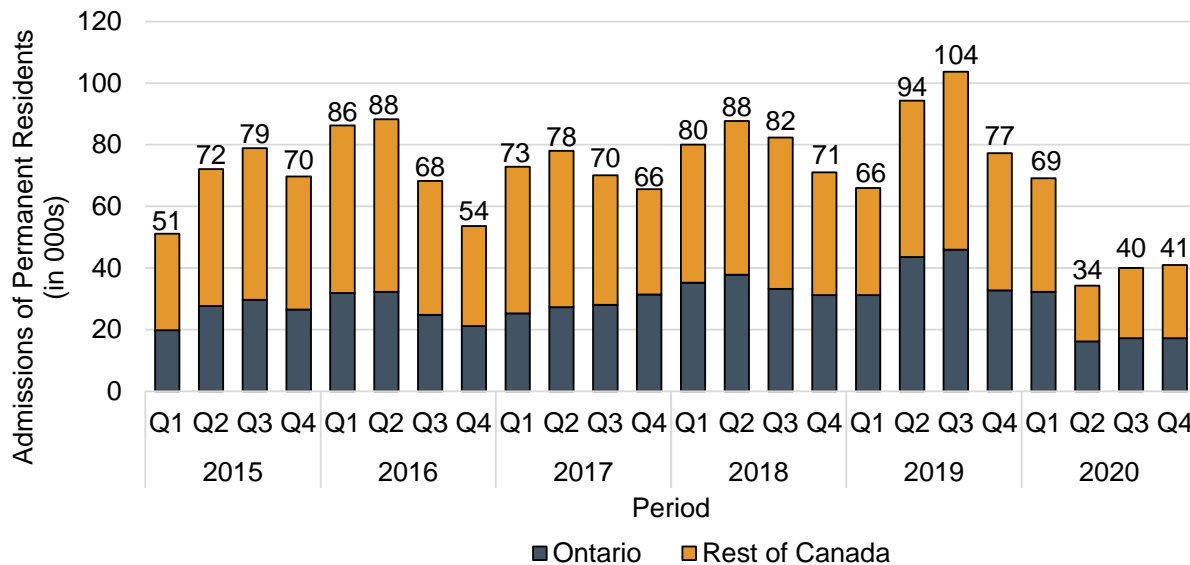
In October 2020, the Canadian federal government released its Immigration Levels Plan for the next three years. Canada has continued to raise the immigration targets and aims to welcome 401,000 new permanent residents in 2021, 411,000 in 2022, and 421,000 in 2023. This is an increase of 50,000 newcomers annually from the previous targets of 351,000 in 2021 and 361,000 in 2026. The increase in immigration targets will make up for the shortfall in 2020 and fill crucial labour market gaps to ensure Canada remains competitive on the world stage. With a focus on economic growth, 60% of admissions are to come from the economic class.¹

Figure 3-23 summarizes admissions to Canada and Ontario by quarter since 2015. Looking forward through 2021, immigration levels to Canada and Ontario are anticipated to remain low as a result of travel restrictions due to COVID-19. A recent report prepared by the Federal Department of Immigration, Refugees and Citizenship Canada (IRCC) indicates that when travel restrictions begin to ease, a significant surge of applications and support requirements is anticipated. Sustainable higher levels of immigration in line with the increased immigration targets, however, will be largely dictated by the on-going strength of the national and provincial economies.

¹ Immigration, Refugee and Citizenship Canada news release, October 20, 2020. <https://www.canada.ca/en/immigration-refugees-citizenship/news/2020/10/government-of-canada-announces-plan-to-support-economic-recovery-through-immigration.html>



Figure 3-23
Ontario and Canada
Quarterly Admission of Permanent Residents in Ontario Versus the Rest of Canada,
2015 to 2020



Source: Derived from IRCC, December 31, 2020, data, by Watson & Associates Economists Ltd.

3.3.4 Longer-Term Growth Drivers and Disruptors in the County of Brant

A number of regional and local growth drivers and disruptors have been identified which are anticipated to influence future population, housing and employment growth within the County of Brant over the 2016 to 2051 period. These drivers and disruptors are identified below.

3.3.4.1 Regional Infrastructure Assets

The County of Brant continues to have a strong appeal to both businesses and residents. This appeal is largely attributed to the County's geographic location directly outside the G.T.H.A. The County of Brant offers proximity and access to key regional infrastructure such as the Toronto Pearson International Airport, Highway 403, Hamilton Airport and Hamilton Port, which serves as Canada's major trade corridor and links major urban centres in Ontario and Quebec to the U.S. The County's highway and arterial road network also offers residents and businesses connectivity within the County as well as transportation access to surrounding employment markets. These



attributes make the County of Brant an attractive destination for permanent residents of all ages as well as small, mid-sized and large businesses.

3.3.4.2 Regional Economic Opportunities

As previously discussed in Chapter 2, the County of Brant is characterized by a blend of expansive rural lands and vibrant Urban Settlement Areas. The County's "small town" urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. For the County of Brant, COVID-19 has acted as a near-term driver of housing demand, 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 the County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in the County of Brant over the long term.

The existing employment base in the County of Brant is concentrated in a number of export-based and community-based employment sectors. The County's employment base is particularly concentrated in manufacturing, transportation and warehousing, construction, agriculture, retail and wholesale trade, and health care and social assistance. Many of these sectors are also anticipated to represent the fastest growing segments of the regional economy; however, it is also noted that a number of emerging knowledge-based sectors are also anticipated to experience steady employment growth over the next several decades. This is discussed further in Chapter 6.

Despite a relatively modest regional growth outlook for manufacturing employment, this sector continues to be a dominant component of the County's industry base. Looking forward, opportunities exist mainly for small to mid-sized firms that will benefit from the economic synergies offered between the County and the larger and growing employment markets within neighbouring areas such as the City of Brantford, Waterloo Region, and the west G.T.H.A.

The County's employment base is also highly concentrated in the creative class economy, including people engaged in arts and culture as artists, actors, performers, writers, and designers. Many of these jobs, as well as the occupations in the County's rural areas are oriented towards small businesses and home-based occupations. The



County is also rich in architectural heritage with numerous historic mills, barns, train stations, bridges, places of worship, and other buildings. The County offers a broad range of entertainment and dining options as well social events and festivals, which attract a growing number of people (both residents and visitors) to the County every year.

With 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 the productivity of the industry by providing value-added products and services, which in turn also helps drive the County's tourism sector. It is one of the key planning principles for the County of Brant to promote and protect the predominantly agricultural character and economy of the County by ensuring the continued viability of agricultural resource areas, the agricultural industry, and agricultural communities in the County. The agricultural 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, as well as other on-farm diversified uses.

The County of Brant has also experienced steady employment growth in the transportation and warehousing sector over the past decade. Rising industrial land prices are anticipated to continue to shift the concentration of land expansive industrial uses within this sector from the G.T.H.A. to outer regions of the G.G.H. and beyond, including the County of Brant. Future demand along the Highway 403 corridor in the County of Brant is anticipated in the logistics sector, driven by competitive development costs and the strategic location for these operations.

As the employment base continues to grow within the County and the surrounding commuter-shed, the economy is also anticipated to diversify generating a range of new live/work and commuting opportunities. As the local employment base and economy within the surrounding commuter-shed continues to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population growth across the County. Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated within neighbouring municipalities within the G.G.H. Outer Ring. Raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the



broader G.G.H. regional economy should represent a key long-term economic development strategy for the County of Brant.

3.3.4.3 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. Looking forward, these “soft” factors represent a key reason why the County’s relative competitive position is likely to strengthen over time, by attracting new residents and business development over the long term.

3.3.5 County of Brant Population Forecast to 2051

3.3.5.1 County of Brant Recommended Long-Term Growth Forecast

The long-term growth population and employment forecast for the County of Brant, as set out in Schedule 3 of the Growth Plan, 2019, has been comprehensively evaluated herein within the context of historical growth trends, the broader growth outlook for the G.G.H., and the influence of regional growth drivers on the share of G.G.H. growth allocated to the County of Brant. These factors are summarized below and used to further rationalize the Growth Plan, 2019 long-term population and employment growth for the County of Brant to the year 2051, as the recommended long-term growth scenario.

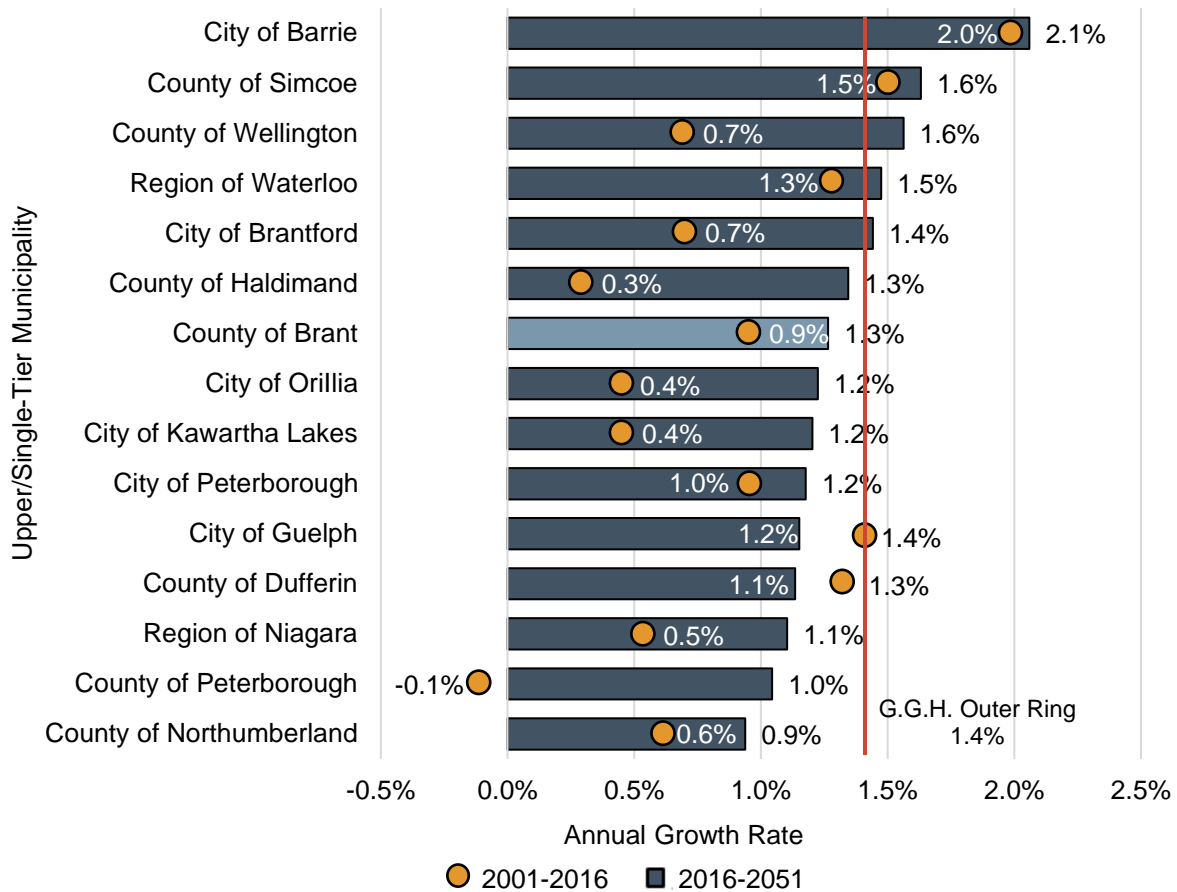
As illustrated in Figure 3-24 and Figure 3-25, the population and employment base for the County of Brant grew at an annual rate of 0.9% and 1.0%, respectively, between 2001 and 2016. Over the 2016 to 2051 forecast period, the rate of annual population and employment growth within the County of Brant is forecast to increase to 1.3% and 1.6%, respectively. Further details regarding the County’s long-term employment outlook are provided in Chapter 6.

Relative to the rate of population and employment growth for the G.G.H. Outer Ring, and more specifically the neighbouring municipalities to the County of Brant, the long-



term growth outlook for the County, as outlined in the Growth Plan, 2019, appears to be reasonable with the broader area and appropriate for the purposes of long-range planning.

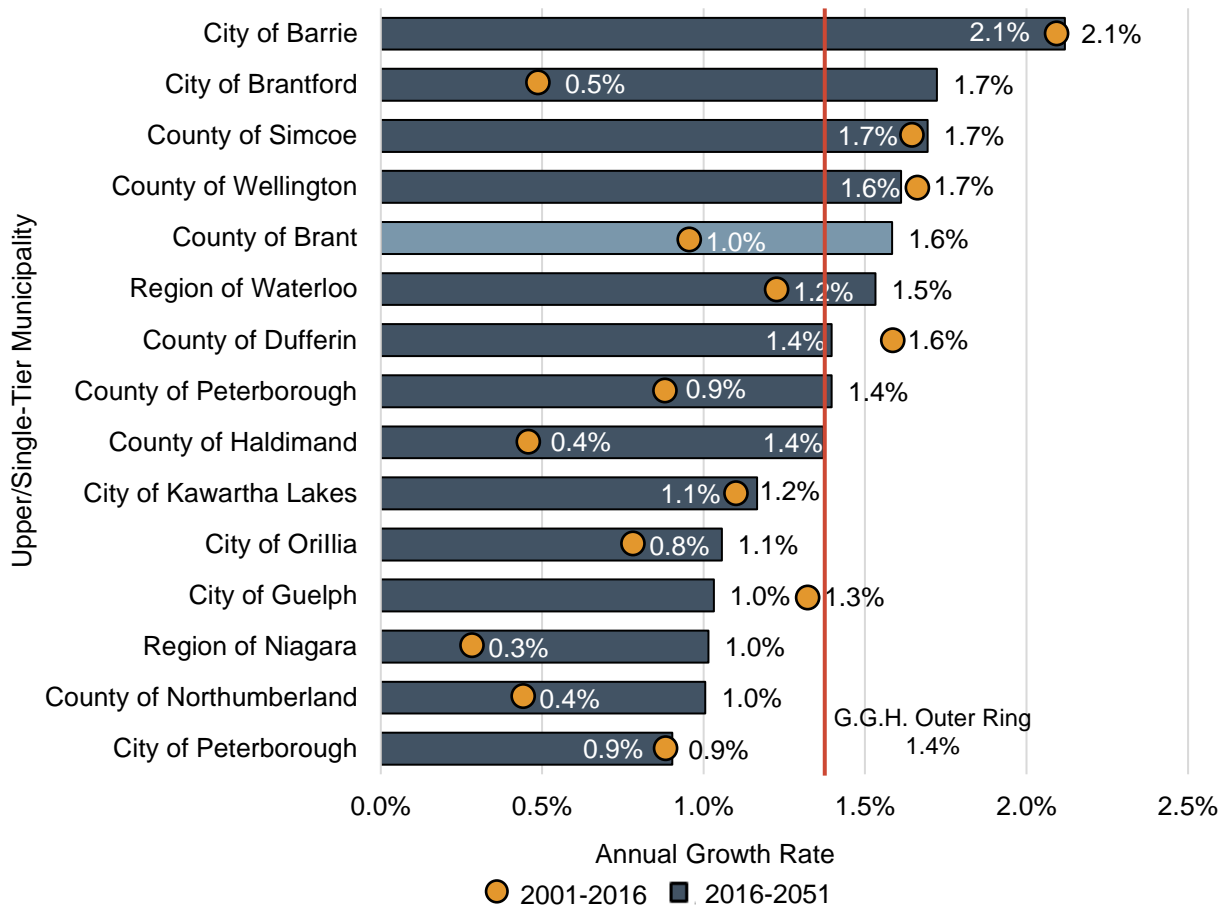
Figure 3-24
G.G.H. Outer Ring
Annual Population Growth Rate by Municipality, 2016 to 2051 (Schedule 3)



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.



Figure 3-25
G.G.H. Outer Ring
Annual Employment Growth Rate by Municipality, 2016 to 2051 (Schedule 3)

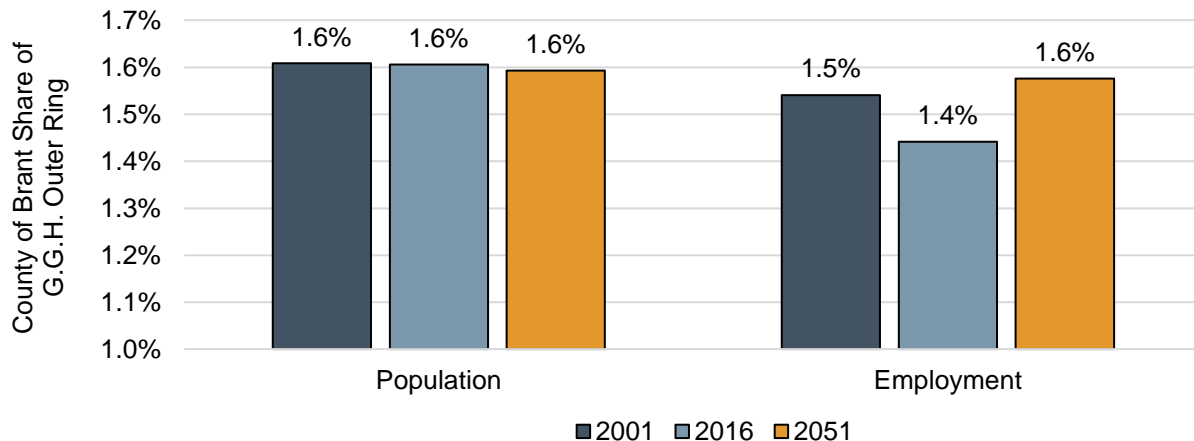


Source: Derived from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, June 16, 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd., 2020.

As illustrated in Figure 3-26, the County of Brant has historically accommodated a steady share of G.G.H. Outer Ring population and a decreasing share of employment within the G.G.H. Outer Ring. Looking forward, the County of Brant’s population is forecast to grow at a comparable rate relative to the G.G.H. Outer Ring as a whole, while the rate of County-wide employment growth is forecast to outpace to G.G.H. average. As such, the share of total G.G.H. Outer Ring population within the County of Brant is forecast to remain stable and the share of employment is expected to increase over the long-term planning horizon.



Figure 3-26
G.G.H.
County of Brant Share of G.G.H. Outer Ring
Population and Employment, 2001 to 2051 (Schedule 3)



Source: 2001 to 2016 derived from Statistics Canada Census and Annual Demographic Estimates : Subprovincial Areas. 2051 from A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation 2020. Ontario.ca/growth planning. Figure by Watson & Associates Economists Ltd.

The Ontario Ministry of Finance (M.O.F.) population projections provide further insight into long-term population trends across Ontario and the G.G.H. In summary, recent population projection updates prepared by the M.O.F. continue to identify a shift in population growth across the G.G.H. from the G.T.H.A. to the G.G.H. Outer Ring. The most recent M.O.F. population projections (Spring 2021) identify that the impacts of COVID-19 have potentially accelerated this shift in population growth from the G.T.H.A. to the G.G.H. Outer Ring; however, these impacts are anticipated to return to their longer-term pre-pandemic trendline by 2022.

When considering long-term population growth scenarios for the County of Brant, it is important to monitor long-term provincial growth forecasts prepared by the Ministry of Municipal Affairs and Housing (M.M.A.H.) and the M.O.F. for the G.G.H. as well as its sub-regional areas. Over the near term, it is anticipated that population growth rates within the County of Brant will outpace the G.G.H. as a whole, which is supported by recent residential building permit activity experienced across the County over the past few years.¹ Over the longer-term, however, population growth rates are anticipated to

¹ Brant County Population, Household and Employment Forecast Update, 2011-2041. Final. May 5, 2015.



moderate due to the aging of the local/regional population, primarily driven by the aging of the Baby Boomers.

As the County's population continues to age, net migration will become an increasing source of population growth. The aging of the population is also anticipated to place downward pressure on labour force participation rates and ultimately labour force growth over the long term. As summarized in section 3.3.5.7, the level of annual net migration required to achieve the Growth Plan, 2019 population is significantly higher than historical trends achieved between 2001 and 2016. While it is reasonable to expect that forecast annual net migration levels in the County of Brant will be higher relative to historical trends, achieving even higher levels of net migration than what has been identified to generate the County's 2051 population forecast is not considered to be a likely long-term scenario.

Based on the review of the County's long-term growth outlook provided in this report, the 2051 population and employment forecast, as set out in Schedule 3 of the Growth Plan, 2019, is the recommended long-term growth scenario for the County of Brant. The Schedule 3 Growth Plan, 2019 forecast for Brant County:

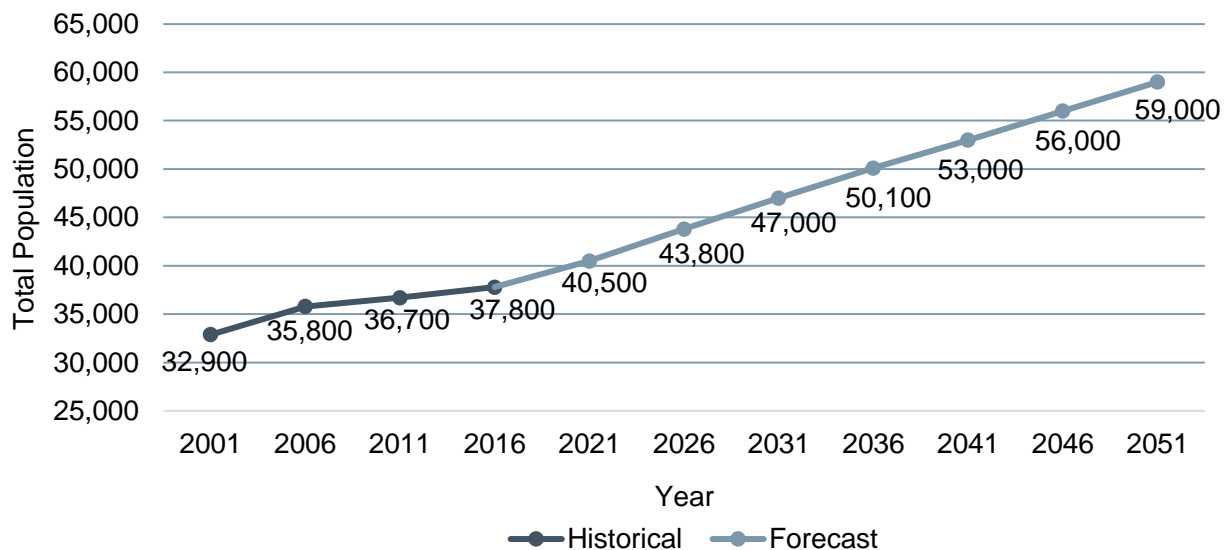
- Represents a reasonable increase in long-term population and employment growth relative to historical trends;
- Accurately identifies the anticipated influence of identified regional and local growth drivers on future development trends across the County; and
- Represents a reasonable change in the share of total population and employment in the County of Brant relative to the G.G.H. Outer Ring as a whole.

In accordance with the detailed review of the County's long-term population and employment growth outlook provided herein, a higher long-term population and employment forecast for the County of Brant is not supported for the purposes of long-term growth management and urban land needs analysis.

Figure 3-27 summarizes the County of Brant's total population growth forecast over the 2016 to 2051 period relative to historical population between 2001 and 2016. By 2051, the County of Brant's total population base is forecast to grow to approximately 59,000. This represents an increase of approximately 21,200 persons between 2016 and 2051, or an average annual population growth rate of 1.3% during this time period.



Figure 3-27
County of Brant
Population Growth Forecast to 2051



Note: Population includes net Census undercount.

Source: Historical data derived from Statistics Canada Census and Annual Demographic Estimates: Subprovincial Areas, 2001 to 2016. Forecast by Watson & Associates Economists Ltd.

3.3.5.2 Total Population Growth Forecast by Major Age Group

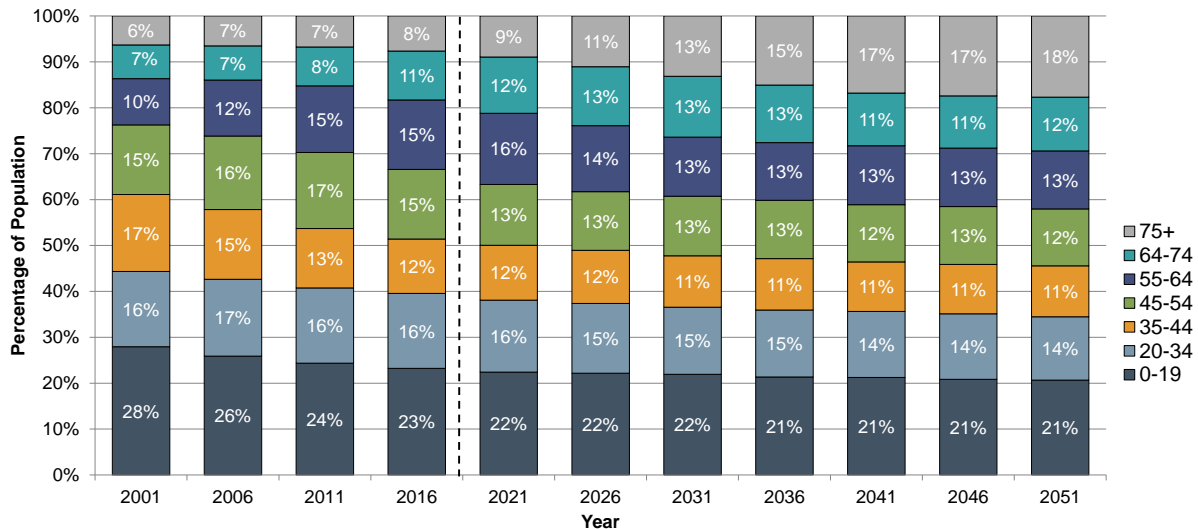
Figure 3-28 summarizes the total population growth forecast for the County of Brant by the percentage population by major age group. Additional details regarding the population forecast by age are provided in Appendix B. Key observations include:

- The percentage of the County of Brant's youth (0-19) is forecast to gradually decline from 23% in 2016 to 21% in 2051;
- The 20-34 age cohort (young adults), which comprised 16% of the population in 2016, is forecast to decrease in percentage share to 14% in 2051;
- The share of population in the 35-54 age group (adults) is forecast to decline from 27% to 23% over the same period;
- The percentage of empty nesters/younger seniors (age 55-74) is forecast to decline from 15% to 13%; and
- The percentage of population in the age 75+ age group (older seniors) is forecast to more than double from 8% in 2016 to 18% in 2051. As previously mentioned,



this is anticipated to place increasing demand on the need for seniors' housing, affordable housing, as well as community and social services.

Figure 3-28
County of Brant
Total Population by Major Age Group, 2016 to 2051



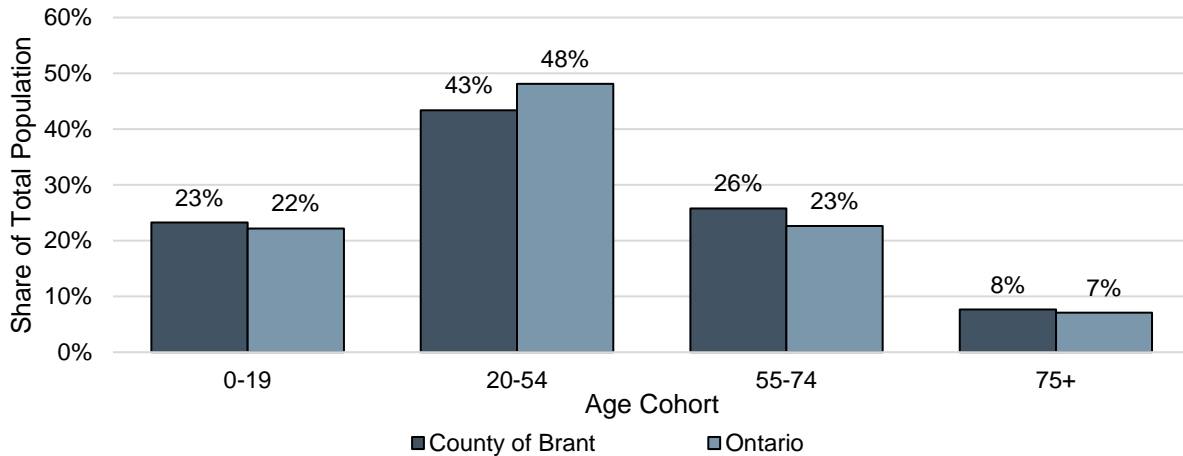
Note: Population includes net Census undercount.
 Source: Population forecast by age derived from 2001 to 2016 Statistics Canada Census and Annual Demographics Estimates data by Watson & Associates Economists Ltd. 2016 to 2051 population forecast by age prepared by Watson & Associates Economists Ltd.

3.3.5.3 County of Brant Population Comparison by Major Age Group

Figure 3-29 and Figure 3-30 summarize the 2016 and 2046 population age structure in the County of Brant compared to the Province of Ontario as a whole. Generally, the County of Brant's existing population is older than that of the Province of Ontario. By 2046, the County's population age structure is anticipated to continue to be older compared to the Province of Ontario.

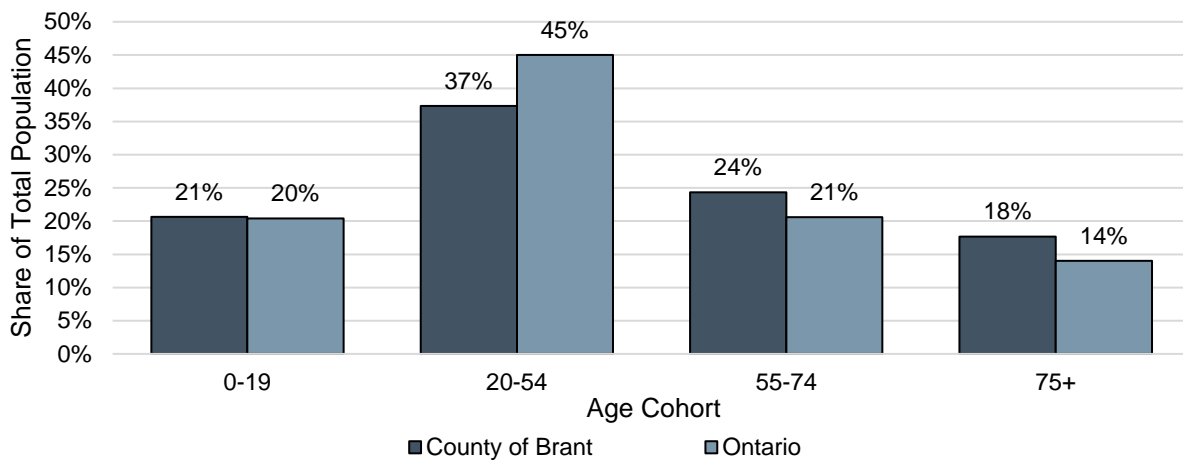


Figure 3-29
County of Brant and Ontario
Comparison of Population Age Structure, 2016



Note: Population used to calculate shares includes the net Census undercount.
Source: Ontario and City of Guelph derived from Statistics Canada Census and Table 17-10-0139-01 by Watson & Associates Economists Ltd.

Figure 3-30
County of Brant and Ontario
Comparison of Population Age Structure, 2046



Note: Population used to calculate shares includes the net Census undercount.
Source: Ontario derived from Ontario Ministry of Finance Population Projections, Summer 2020, and County of Brant by Watson & Associates Economists Ltd.



3.3.5.4 Planning for Existing and Future Generations within the County of Brant

As previously identified, forecast trends in population age structure are important to address as these demographic trends will directly influence the rate of future population growth as well future housing needs, infrastructure requirements and community services across the County of Brant. For most Canadian municipalities, including the County of Brant, the influence of key demographic groups such as Generation Z, Millennials, and Baby Boomers on the future of local real estate markets is particularly important to address. A brief summary of how these demographic groups are anticipated to shape future housing market demand across the County of Brant is provided below.

3.3.5.5 Addressing the Future Housing Needs of Millennials and Generation Z

Millennials are typically defined as the segment of the population that reached adulthood during the 2000s. While there is no standard age group associated with the Millennial generation, persons born between 1980 and 1992 (currently 29 to 41 years of age in 2021) best fit the definition of this age group. Millennials represent a large cohort in Canada, rivaling the Baby Boomer generation in terms of size and impacts on the real-estate market and labour force base. As of 2016, Millennials comprise approximately 15% of the County of Brant's population,¹ slightly lower than the Ontario provincial average of 17%. As of 2016, Millennials within the neighbouring G.G.H. municipalities (City of Guelph, City of Hamilton, Region of Waterloo, County of Dufferin, and Region of Halton) represent between 14% to 20% of their respective municipalities' population base.²

Home ownership is considered important for most Millennials. A recent Royal LePage study found that nearly half the Canadians aged 25-35 owned their home, and that 68% who currently are not homeowners planned to purchase a home in the next five years, with 72% being confident in their financial outlook. Nearly two-thirds of this age group who are employed or seeking employment feel the ability to work remotely for an employer is important, and approximately half said this has increased their likeliness to move further from their place of work. In total, nearly two in five are considering a move to a less dense area due to the COVID-19 pandemic, while approximately half said

¹ Statistics Canada, Census 2016, population by age.

² Ibid.



COVID-19 did not impact their desire to move into less dense areas. Given an option, 45% indicated they would prefer living in a city, while 47% said they would choose small town or country living. The most attractive features of living in a city were walkability (21%) and access to events, attractions and other entertainment options (21%), followed by diversity of people and cultures (18%), and more employment opportunities (17%). The top reasons for wanting to move to a less dense area included access to more outdoor space (62%) and lower home prices (61%), followed by the affordability of larger properties (51%).¹

Much of this demand for future home ownership appears to be the desire for additional floor space and a yard, in many cases to accommodate a growing family. Anticipated housing demand by the Millennial population is expected to drive future housing needs across Brant County, largely in Primary Settlement Areas (Growth Centres: Paris/St. George), which provide options for first-time homebuyers as well as “move-up” buyers with growing families. With this in mind, housing demand within this demographic group is anticipated to be primarily strong for grade-related housing forms including single and semi-detached, townhouses, including back-to-back and stacked townhouses.

Generation Z, the cohort which directly follows the Millennial Generation, is now entering the real estate and labour markets. Demographers and researchers typically use the mid-1990s to mid-2000s as starting birth years to describe the Generation Z cohort. For the purposes of this study, we have assumed that those born between 1993 and 2005 (16 to 28 years of age as of 2021) comprise Generation Z. As of 2016, this population represented 16% of the County’s population base; however, at that time, this population base was primarily a youth population base (11 to 23 years of age) and not a major component of the housing market. Over the next several decades, Generation Z is also anticipated to place increased demand on medium- and high-density ownership and rental housing.

It is also important to recognize the impact of Millennials and Generation Z on the nature of future employment growth, which will be increasingly driven by the knowledge-based economy. Compared to older age groups, Millennials and Generation Z have a higher average level of education attainment in Canada compared to older age groups. Millennials are considered the most educated generation; nearly 70% of Millennials

¹ Royal LePage 2021 Demographic Survey (full national, regional and city-level results): rlp.ca/table_2021demographicsurvey



have a post-secondary certificate, diploma and degree compared to the previous generation, Gen-X at approximately 55%.¹ This bodes well in accommodating labour within the knowledge-based economy; however, it has posed a challenge in accommodating employment in other sectors of the economy, including unskilled employment, as a greater share of the Baby Boomer generation enters retirement. Generation Z will continue to serve as a catalyst for both growth and change related to future office, retail, institutional and industrial developments across the County of Brant. The extent to which the County of Brant can capitalize on potential demand from these demographic groups is subject to a number of economic and socio-economic variables (e.g., relative housing costs/affordability, local and regional employment opportunities, broadband infrastructure, lifestyle preferences, local amenities, community services and perceived quality of life).

3.3.5.6 *Continuing to Plan for Older Generations*

As previously discussed, the average age of the population base in the County of Brant is getting older, due to the large concentration of Baby Boomers within the County. As of 2021, this age group is between 57 and 75 years of age. As of 2016, Baby Boomers comprised 27% of the County's population base, slightly higher than the Ontario provincial average of 25%.² As the County's Baby Boom population continues to age, the percentage of seniors, particularly older seniors (i.e., 75 years of age and older) within the County is anticipated to steadily increase over the 2016 to 2051 forecast period. From 2001 to 2016, the County's 75+ population grew at an annual rate of 2.2%. Over the 2016 and 2051 period, the forecast population growth rate for the 75+ age group is forecast to increase to 3.7% annually. This demographic trend is anticipated to be largely driven by the aging of the County's existing population, as opposed to net-migration of older residents into the County. It is important to recognize that not only is the Baby Boom age group large in terms of its population share in the County of Brant, it is also diverse with respect to age, income, health, mobility, and lifestyle/life stage.

Considerable research has been undertaken over the past decade regarding the aging population and its impact on housing needs over the long term. The majority of

¹ Statistics Canada, Income Statistics Division and Analytical Studies Branch, Statistics Canada, Economic Well-being Across Generations of Young Canadians: Are Millennials Better or Worse Off?, April 2019.

² Statistics Canada, Census 2016, population by age.



literature and commentary regarding the housing needs of older Canadians suggests that a large percentage of seniors will “age in place”; that is, they will continue to live in their current home and/or community for as long as possible even if their health changes. While there is strong rationale to support “aging in place” as a general concept, it is important to address the current characteristics of the County’s housing stock occupied by older adults (i.e., house size, built-form, location and amenities) against the socio-economic characteristics of older residents in the County (i.e. household income, housing affordability, mobility, health, etc.). These factors are also important to recognize when comparing housing preferences of Baby Boomers with previous generations. With this in mind, it is important to recognize that the concept of “aging in place” should emphasize the goal to age with some level of independence “within the community,” as opposed to simply “aging at home.” The overarching message around “aging in place” is that seniors require choice as well as access to services and amenities regarding their living arrangements. This could involve the creation of new housing through infill or intensification of established areas which can facilitate “aging in place” by providing housing options that allow seniors to remain in their communities when responding to life changes.

3.3.5.7 Components of Population Growth

Figure 3-31 through to Figure 3-33 summarize population growth in the County of Brant by component, including net migration and natural increase (births less deaths). As previously mentioned, net migration is anticipated to represent the largest component of forecast population growth in the County of Brant. This is a result of diminishing population growth from natural increase due to the aging of the population. Net migration can be broken into three broad categories, including:

- **International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents. Over the last decade, this component of net migration is anticipated to represent a relatively small source of net migration for the County of Brant;
- **Inter-provincial Net Migration** – is comprised of in-migration less out-migration from other Canadian Provinces/Territories. Historically this has also not been a major source of net-migration for the County of Brant; and
- **Intra-provincial Net Migration** – Includes in-migration less out-migration from elsewhere within the Province of Ontario. This has been a significant source of net migration over the last decade for the County of Brant.

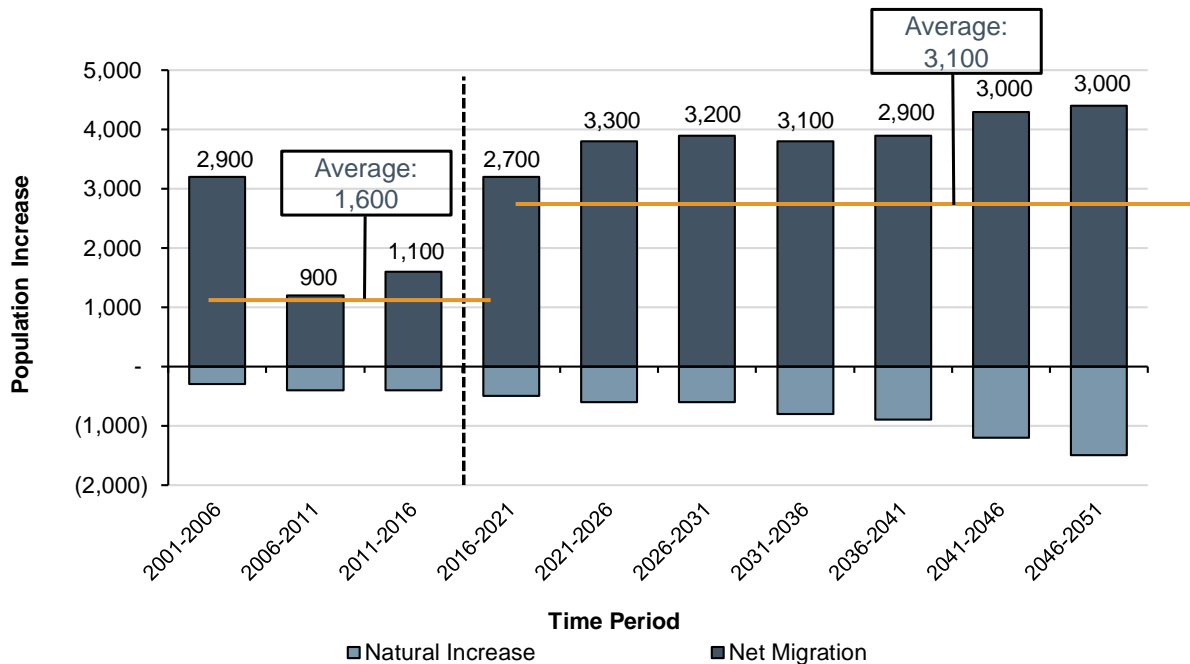


Key observations with respect to the components of population growth in the County of Brant include:

- Over the 2016 to 2051 period, population growth within the County of Brant is anticipated to be driven solely from net migration;
- The County is forecast to accommodate nearly 800 net new migrants per year (or 3,900 migrants every five years). Relative to historical trends, this represents a considerable increase (i.e., almost double) in the average historical levels of net migration experienced between 2001 and 2016;
- As previously discussed, forecast net migration in the County of Brant is anticipated to be largely driven by the long-term economic growth prospects in the regional economy and surrounding commuter-shed. Local housing growth opportunities targeted to a broad range of demographic groups (i.e., first-time homebuyers, families, empty nesters, and seniors) and the County's attractiveness as a place to work and live also represent key drivers of net future migration within the County; and
- The County is anticipated to experience relatively strong net migration across most major age groups.



Figure 3-31
County of Brant
Historical and Forecast Population Growth Associated with Net Migration
and Natural Increase, 2016 to 2051

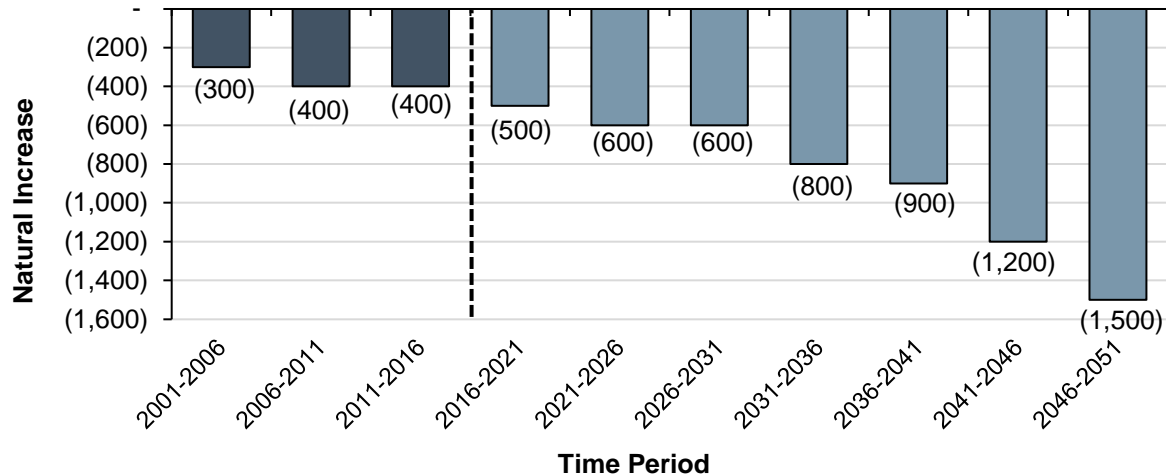


Note: Population includes net Census undercount.
Source: Historical net migration and natural increase derived from Statistics Canada, Demography Division. 2016 to 2051 estimated by Watson & Associates Economists Ltd.

Figure 3-32 summarizes forecast population growth associated with natural increase for the County of Brant relative to historical trends, while Figure 3-33 summarizes forecast population growth associated with net migration for the County. As previously illustrated, historical population growth (2001 to 2016) associated with natural increase has been negative in the County of Brant, due to the aging of the population. Over the forecast period, the share of population growth associated with natural increase is forecast to continue to decline, particularly during the post-2041 period.



Figure 3-32
County of Brant
Historical and Forecast Natural Increase, 2016 to 2051



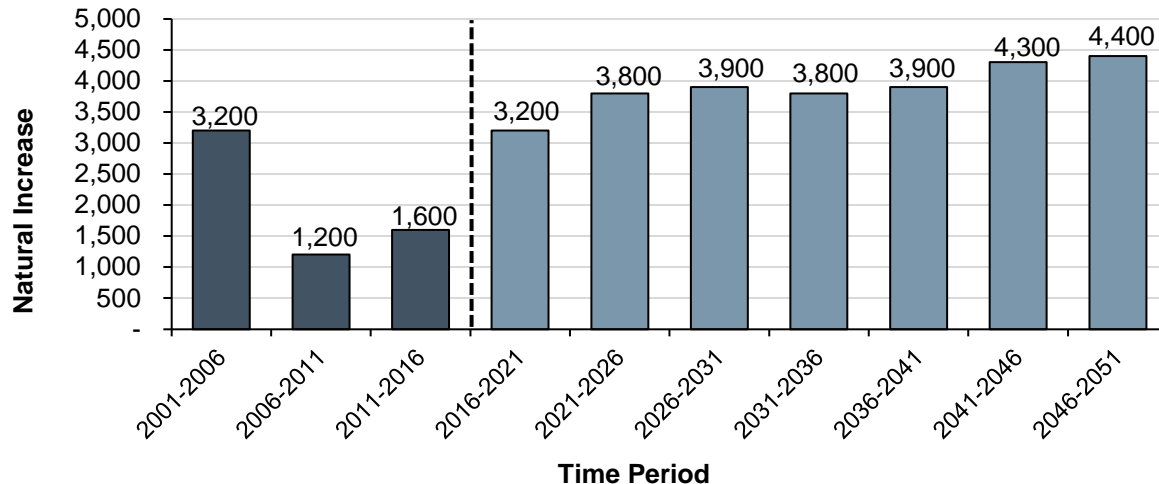
Note: Population includes net Census undercount.

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

As summarized in Figure 3-33, net migration is anticipated to increase significantly over the forecast period compared to historical trends over the past 15 years. Similar to recent historical trends, it is anticipated that a large component of net migration will come from intra-provincial migration, primarily from larger urban centres within the west G.T.H.A.



Figure 3-33
County of Brant
Historical and Forecast Net Migration Increase, 2016 to 2051



Note: Population includes net Census undercount.

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

3.3.6 County of Brant Housing Forecast to 2051

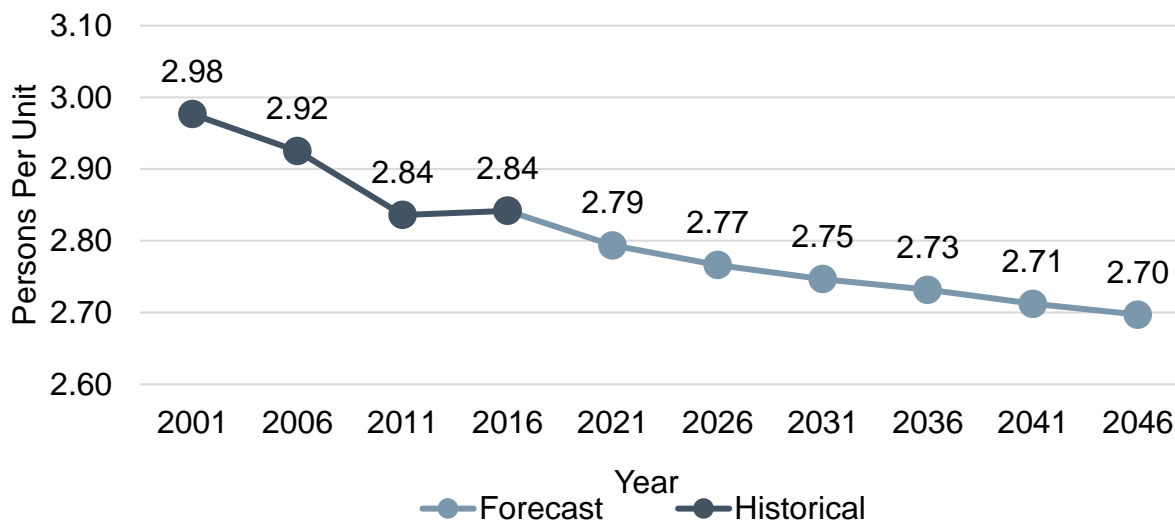
3.3.6.1 Anticipated Housing Occupancy Trends to 2051

3.3.6.1.1 Persons Per Unit

Figure 3-34 summarizes anticipated long-term forecast average housing occupancy trends (i.e., P.P.U.) for the County of Brant from 2016 to 2051 within the context of historical trends from 2001 to 2016. As previously discussed, this P.P.U. forecast is based on a headship rate analysis. As previously mentioned, recent P.P.U. levels have stabilized within the County of Brant. Recent upward impacts of COVID-19 on housing prices and rents may further exacerbate this trend as young adults defer entering into the housing market. Over the long-term forecast period, however, average household occupancy levels are expected to decline between 2016 and 2051, largely as a result of the aging of the population.



Figure 3-34
County of Brant
Historical and Forecast P.P.U., 2016 to 2051



Note: Population includes net Census undercount.

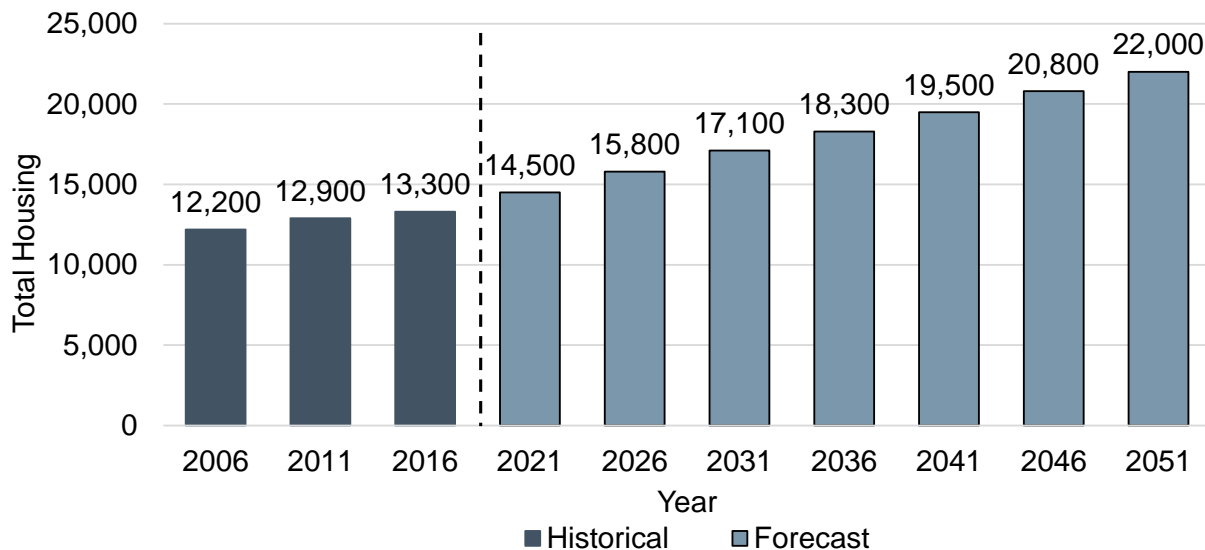
Source: Historical data derived from from Statistics Canada Census and Annual Demographic Estimates data, 2001 to 2016. Forecast by Watson & Associates Economists Ltd.

3.3.6.2 County-Wide Housing Forecast to 2051

Figure 3-35 summarizes the long-term total household forecast for the County of Brant to 2051. As of 2016, the County's housing base was approximately 13,300 units. By 2051, the number of households in the County is anticipated to increase to approximately 22,000 total households. This represents an annual housing growth rate of approximately 1.4% over the 35-year forecast period. This represents a higher rate of forecast housing growth relative to the County's historical 15-year average annual housing growth rate (1.2% from 2001 to 2016). As previously discussed, recent residential building permit activity (new units only) has been relatively strong in recent years, generating an estimated increase of approximately 240 occupied households per year between 2016 and 2021. Over the 2021 to 2051 forecast period, the County is forecast to average approximately 250 new housing units per year, which is approximately 66% higher than the average level of 150 new housing units which was achieved from 2006 to 2016.



Figure 3-35
County of Brant
Household Forecast, 2016 to 2051



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

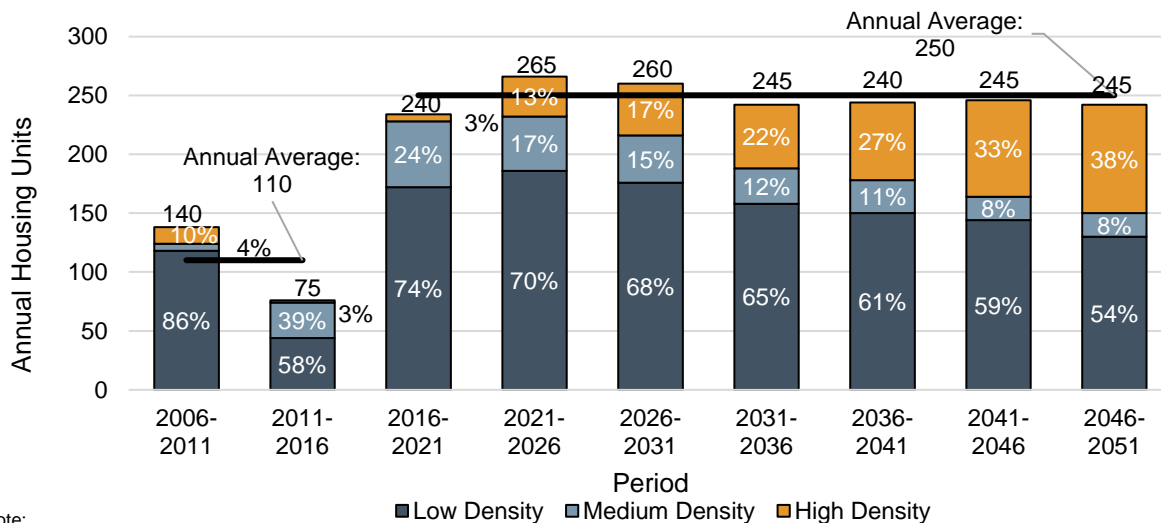
Figure 3-36 summarizes the long-term total annual household forecast for the County of Brant in five-year increments from 2016 to 2051 and by housing type. It is anticipated that a large component of housing growth will include low-density housing development at 64%, followed by medium density at 14% and high density at 22%. As previously discussed within this chapter, the propensity analysis suggests that there is a preference for low-density housing developments. While there is strong demand for low-density housing within the County, increasing demand is also anticipated for medium- and high-density housing forms to provide greater choice in housing options by type and tenure for a broad range of residents by age and income.

Addressing the interconnection between the County's competitive economic position and its longer-term housing needs by market segment is critical in realizing the County's future forecast population and employment growth potential as well as the County's ultimate goals related to prosperity, opportunity, and livability. This approach recognizes that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. To ensure that economic growth is not constrained by future labour shortages, effort will be required by Brant County and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a



diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the Region’s attractiveness to older population segments.

Figure 3-36
County of Brant
Annual Household Forecast by Housing Type,
5-Year Growth Increment, 2016 to 2051



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.
Secondary unit potential is included in the high-density housing category.

Source: 2006 to 2016 derived from Statistics Canada Census and 2016 to 2051 forecast by Watson & Associates Economists Ltd.

3.4 Observations

It is recognized that future population and employment growth within the County of Brant is strongly correlated with the growth outlook and competitiveness of the economy within the County of Brant and the surrounding region – which in this case is largely represented by the G.G.H.

The G.G.H. Outer Ring is projected to be the fastest growing region in Ontario over the next 30 years. Due to its geographic location within the southwestern region of the G.G.H. Outer Ring, the County of Brant is forecast to experience significant outward growth pressure over the next several decades largely from the west and north G.T.H.A.



upper-tier municipalities, which have historically been amongst the fastest growing municipalities in Ontario in recent decades.

By 2051, the County of Brant's total population base is forecast to grow to approximately 59,000 persons as per Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 21,200 residents between 2016 and 2051, or an average annual population growth rate of 1.3% during this time period.

Accommodating forecast total population growth in the County of Brant will require approximately 8,700 new households, or almost 248 new Census households annually over the 2016 to 2051 period (or 250 over the 2021 to 2051 period). In accordance with the comprehensive analysis provided as part of this report, the Growth Plan, 2019 is recommended as the preferred long-term growth scenario for the County of Brant. As such, a higher long-term population forecast for the County of Brant is not supported for the purposes of long-term growth management and urban land needs analysis.

It is important to recognize that while the County's population base is growing, it is also getting older. Between 2016 and 2051, the 75+ age group (older seniors) is forecast to represent the fastest growing population age group, with an average annual population growth rate of 3.7%. With an aging population, the County will be more reliant on net migration as a source of population as opposed to natural increase. With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density forms including seniors' housing and affordable housing options. The County of Brant is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.



Chapter 4

Population and Housing Allocations



4. Population and Housing Growth Allocations to 2051

4.1 Introduction

This chapter provides a summary of the forecast population and housing allocations by Urban System and Rural System within the County of Brant.¹ Detailed tables on population and housing growth allocations are provided in Appendix C.

4.1.1 Allocation Review

The population and housing allocations by Primary Settlement Areas (Growth Centres) (Urban System) and Rural System were developed based on a detailed review of the following local supply and demand factors.

Local Supply Factors:

- Supply of potential future housing stock in the development process by housing structure type and approval status;
- Housing intensification opportunities;
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process;
- Water and wastewater servicing capacity and potential solutions to overcome constraints (where identified); and
- Provincial policy direction regarding forecast residential growth by urban system versus rural system.

Demand Factors:

- Historical population and housing activity by structure type based on Statistics Canada (Census) data by Primary Settlement Areas (Growth Centres) and Rural Settlements (Secondary Settlement Areas and Hamlets) and remaining areas in the Rural System;

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

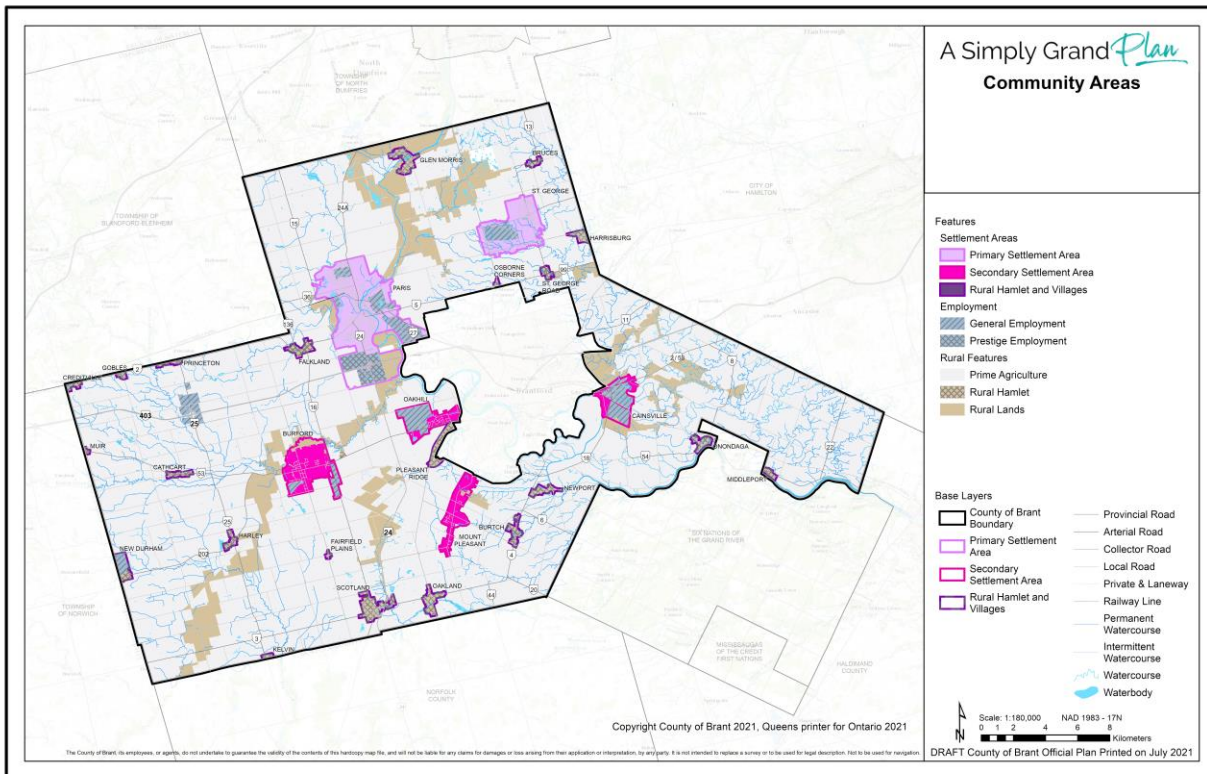


- A review of historical residential building permit activity (new units only) by structure type from 2011 to 2020 by Primary Settlement Areas (Growth Centres) and the Rural System;
- The influence of population and employment growth within the surrounding market areas on the geographic distribution of growth and settlement patterns across the County;
- Market demand for housing intensification; and
- Appeal to families and empty nesters/seniors.

4.1.2 Location of Urban Settlement Areas and Rural System

Figure 4-1 provides a map of the Community Structure which illustrates the proposed Urban System and Rural System within the County of Brant as discussed in Chapter 2.

Figure 4-1
County of Brant
Map of Proposed Community Structure



Source: County of Brant, Draft New O.P.

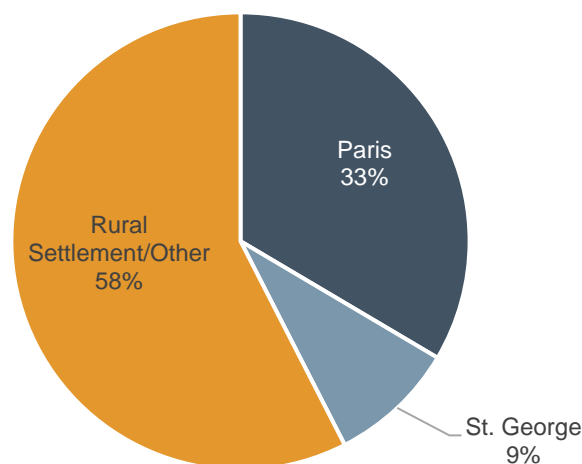


4.2 County of Brant Population by Primary Urban Growth Settlements and Rural System

4.2.1 County of Brant Population and Housing by Geographic Area, 2016

In 2016, the County of Brant had a population of approximately 37,800. Of the County's 2016 population base, approximately 42% was located within the County of Brant's Primary Settlement Areas (Growth Centres) of Paris and St. George, as illustrated in Figure 4-2. In terms of population, Paris was the largest urban settlement area with a population of 12,700. This is followed by St. George with a population of approximately 3,400. The County's Rural System accommodated a population of approximately 21,800, representing 58% of the County's population base.

Figure 4-2
County of Brant
Population by Area, 2016

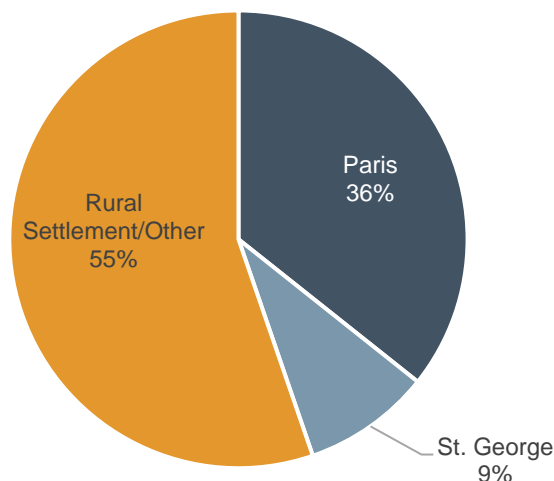


Source: Watson & Associates Economists Ltd.

The County of Brant had a housing base of approximately 30,270 in 2016, of which 45% was accommodated in the Primary Settlement Areas (Growth Centres) of Paris and St. George. In terms of total households, Paris accommodated 4,740 units and St. George 1,200 units. The County's Rural System accommodated approximately 7,330 households, representing 55% of the County total.



Figure 4-3
County of Brant
Housing by Area, 2016



Source: Watson & Associates Economists Ltd.

4.2.2 Historical Growth by Primary Settlement Areas (Growth Centres) and Rural System, 2006 to 2016

Figure 4-4 and Figure 4-5 summarize historical population and housing growth trends in the County of Brant by Primary Settlement Areas (Growth Centres) and Rural System over the past 10 years by Census period. Key observations include:

- The Primary Settlement Areas (Growth Centres) of Paris experienced the most County-wide growth, with its population increasing by 1,050 people representing 53% of the County of Brant's population growth over the 10-year period. Households increased by 490 units in Paris representing 48% of County-wide housing growth over the same period. In terms of annual growth rates, the Paris population grew at a rate of 0.9% and housing 1.1%, which is higher than the County-wide rate of 0.5% and 0.8%, respectively.
- The Primary Settlement Areas (Growth Centres) of St. George grew by 280 people, representing 14% of the County of Brant population growth over the 10-year period. Households increased by 160 units in St. George representing 15% of County-wide housing growth over the same period. Even with lower total population and housing growth relative to the other areas, St. George experienced population and housing annual growth rates of 0.9% and 1.4%, well above the County-wide average.



- The Rural System population increased by 670 people from 2006 to 2016, comprising 34% of County-wide growth. Housing units increased by 380 units over the 10-year period, accounting for 37% of all housing unit growth in the County of Brant. In terms of annual growth rates, the Rural System has experienced relatively lower population and housing rates of 0.3% and 0.5%, respectively, relative to Paris and St. George.

Figure 4-4
County of Brant
Historical Population Growth by Primary Settlement Areas (Growth Centres) and Rural System, 2006 to 2016

Area	2006	2016	2006 to 2016	10-Year Annual Average	Share of County 10-Year Growth	10-Year Annual Growth Rate
Paris	11,630	12,680	1,050	105	53%	0.9%
St. George	3,070	3,350	280	28	14%	0.9%
Rural System ¹	21,100	21,770	670	67	34%	0.3%
County of Brant	35,800	37,800	2,000	200	100%	0.5%

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

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

Source: Watson & Associates Economists Ltd.

Figure 4-5
County of Brant
Historical Census Housing Growth by Primary Settlement Areas (Growth Centres) and Rural System, 2006 to 2016

Area	2006	2016	2006 to 2016	10-Year Annual Average	Share of County 10-Year Growth	10-Year Annual Growth Rate
Paris	4,240	4,740	490	49	48%	1.1%
St. George	1,040	1,200	160	16	15%	1.4%
Rural System ¹	6,950	7,330	380	38	37%	0.5%
County of Brant	12,240	13,270	1,030	103	100%	0.8%

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

Note: Figures may not equal totals due to rounding.

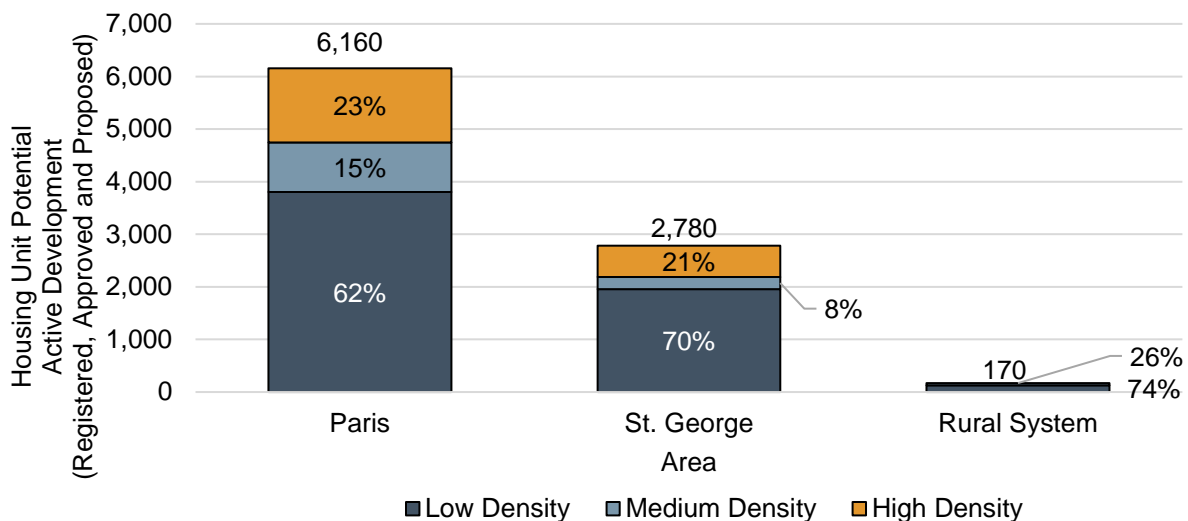
Source: Watson & Associates Economists Ltd.



4.2.3 Anticipated Housing Development by Primary Settlement Areas (Growth Centres) and Rural System

The County's active residential development application data was reviewed to provide insight into the demand for residential housing units by Primary Settlement Areas (Growth Centres) and Rural System. Figure 4-6 and Figure 4-7 provide a summary of potential housing units on vacant lands with approved and proposed development applications. It is estimated that approved applications (registered unbuilt and draft approved) have the potential to accommodate 7,190 housing units, of which the majority of these developments are concentrated in Paris (61%) followed by St. George (39%). It is estimated that proposed developments have the potential to accommodate an additional 1,920 units, the majority of which are concentrated in Paris. Overall, Paris represents 68% of the housing unit potential with respect to active developments in the planning approvals process, followed by St. George at 30% and the remaining 2% in the Rural System.

Figure 4-6
County of Brant
Housing Potential on Vacant Lands
Registered Unbuilt/Draft Approved and Applications Under Review
by Primary Settlement Areas (Growth Centres) and Rural System, Year-End 2020



Note: The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Source: Derived from County of Brant data by Watson & Associates Economists Ltd.



Figure 4-7a
County of Brant
Housing Potential on Vacant Lands
Registered Unbuilt/Draft Approved and Applications Under Review
by Primary Settlement Areas (Growth Centres) and Rural System, Year-End 2020

Area & Stage of Development	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units	Total Housing Unit Share
Paris – Registered	1,133	534	770	2,437	27%
Paris – Draft Approved	1,176	374	417	1,967	22%
Paris – Proposed	1,493	39	221	1,753	19%
Paris – Total	3,802	947	1,408	6,157	68%
St. George – Registered	97	0	0	97	1%
St. George – Draft Approved	1,860	232	592	2,684	29%
St. George – Total	1,957	232	592	2,781	30%
Rural System – Proposed/Total	126	44	0	170	2%
County of Brant Total	5,885	1,223	2,000	9,108	100%

Source: Based on County of Brant data as of December 2020.

In addition to an active development pipeline of approximately 9,100 potential housing units within the County, there is the potential for an additional 610 housing units on vacant urban lands within no active applications in Paris. In total, the County of Brant has the potential to accommodate 9,110 housing units on designated lands including active applications in the Rural System.



Figure 4-8
County of Brant
Housing Potential on Vacant Urban Lands, No Active Applications,
As of Year-End 2020

Area	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units
Paris	468	0	144	612
Share	76%	0	24%	100%

Source: Based on County of Brant data as of December 2020.

4.2.4 County of Brant Population and Housing Allocations by Primary Settlement Areas (Growth Centres) and Rural System to 2051

Figure 4-9 to Figure 4-14 provide a summary of the population and housing forecast to 2051 by Primary Settlement Areas (Growth Centres) and Rural System. Further details are provided in Appendix C. While population and employment growth rates vary by geographic area, each of the areas share a number of relatively common attributes with respect to long-term residential development and demographic trends. These include:

- All areas are expected to experience housing growth over the long-term forecast period;
- Average annual new housing construction is anticipated to increase from recent levels experienced over the past ten years in Primary Settlement Areas (Growth Centres);
- Future housing growth will be dominated by low-density housing forms; however, increasing market opportunities will exist for medium-density and high-density housing; and
- P.P.U. levels are forecast to experience a slight decline over the planning horizon. In addition to previously discussed demographic trends, a moderate shift from Census families and Census non-families is also forecast to have a downward influence on projected P.P.U. levels.

As identified above, various factors were considered in allocating population and housing growth by Primary Settlement Areas (Growth Centres) and Rural System. In



addition to the above considerations, a number of assumptions were made with respect to the residential growth potential of each area, based on discussions with County staff.

Key observations regarding the housing and population growth allocations by Primary Settlement Areas (Growth Centres) and Rural System are provided below. As previously mentioned, further details on the population and housing by Primary Settlement Areas (Growth Centres) and Rural System are provided in Appendix C, which includes details on the housing by structure type, existing population and housing base and forecast to 2051.

Paris

- The existing population base in Paris as of 2016 comprises 34% of the population within the County of Brant.
- As summarized in Figure 4-10, Paris is anticipated to accommodate the largest share (approximately 60%) of the County's population growth over the 2016 to 2051 forecast horizon. This is consistent with historical population and housing trends observed.
- Paris is anticipated to grow at an annual population rate of 2.0% over the next 35 years (2016 to 2051), which is higher than the annual growth rate experienced over the most recent 10-year Census period (2006 to 2016) at 0.9% annually.
- As summarized in Figure 4-12, Paris is anticipated to add 5,135 additional housing units over the 2016 to 2051 period, representing approximately 147 units annually, which is almost triple the annual housing units added over the 2006 to 2016 period (as previously summarized in Figure 4-5, the annual households added over the 2006 to 2016 period was 49 units).
- It is anticipated that Paris will accommodate a wide range of housing by structure type compared to historical trends; however, the largest portion of housing growth is anticipated in low-density housing forms as summarized in Figure 4-14. This is consistent with upcoming development in the Primary Settlement Areas (Growth Centres) active development pipeline (registered/unbuilt and proposed), as previously discussed.
- The majority of future development in Paris is anticipated to be accommodated within the D.G.A., as will be discussed later in this chapter.



St. George

- St. George's existing population base as of 2016 comprises 9% of the population within the County of Brant.
- As summarized in Figure 4-10, St. George is anticipated to accommodate approximately one-fifth (20%) of the County's population growth over the 2016 to 2051 forecast horizon. It is important to recognize that most of the population growth (nearly 80%) during the long-term planning horizon will occur post-2031 (2031 to 2051).
- Population growth within St. George is anticipated to be significantly higher than historical trends. As summarized in Figure 4-11, St. George is anticipated to achieve a slightly higher rate of population growth (2.3% annually) relative to Paris. Comparatively, the annual population growth rate in St. George over the 2006 to 2016 period was approximately 0.9% annually.
- As summarized in Figure 4-12, St. George is anticipated to add 1,650 additional housing units over the 2016 to 2051 period, or approximately 47 units annually, which is significantly higher than the housing units added over the 2006 to 2016 period of approximately 16 units annually.
- The majority of future urban development in St. George is anticipated to be accommodated within the D.G.A., as will be discussed later in this chapter.

Rural System

- The 2016 population of the Rural System comprises 58% of the County of Brant population.
- As summarized in Figure 4-10, the Rural System is anticipated to accommodate one-fifth (20%) of the County's population growth over the 2016 to 2051 forecast horizon. It is important to recognize that almost a quarter of the population growth during this period has already occurred over the last five years (2016 to 2021).
- Post-2021, it is anticipated that growth within the Rural System will gradually slow, largely due to municipal servicing constraints.
- As a result, the Rural System is anticipated to have a noticeably lower growth rate relative to the Primary Settlement Areas (Growth Centres) of Paris and St. George. The annual population growth rate of the Rural System is anticipated to



increase at a rate of 0.5%, which is higher than the growth rate observed over the most recent 10-year Census period of 0.3% annually.

Figure 4-9
County of Brant
Population Forecast by Primary Settlement Areas (Growth Centres) and Rural System

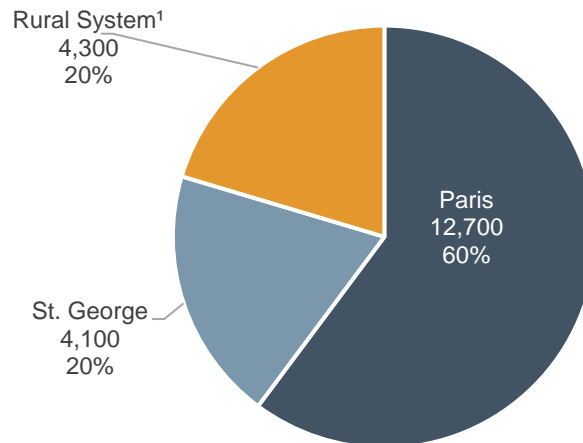
Year	Paris	St. George	Rural System ¹	County of Brant
2016	12,700	3,400	21,800	37,800
2051	25,400	7,500	26,100	59,000
2016 to 2051	12,700	4,100	4,300	21,200

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

Note: Figures may not add precisely due to rounding.

Source: Based on County of Brant data as of December 2020.

Figure 4-10
County of Brant
Population Growth Allocation, 2016 to 2051
by Primary Settlement Areas (Growth Centres) and Rural System



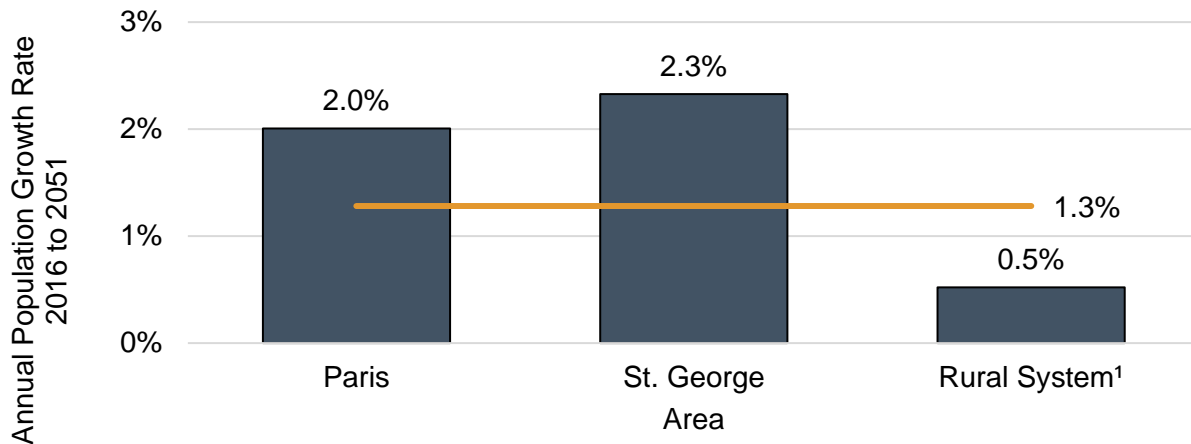
¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Figure 4-11
County of Brant
Annual Population Growth Rate, 2016 to 2051
By Primary Settlement Areas (Growth Centres) and Rural System



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
 Note: Population includes net Census undercount.
 Source: Watson & Associates Economists Ltd.

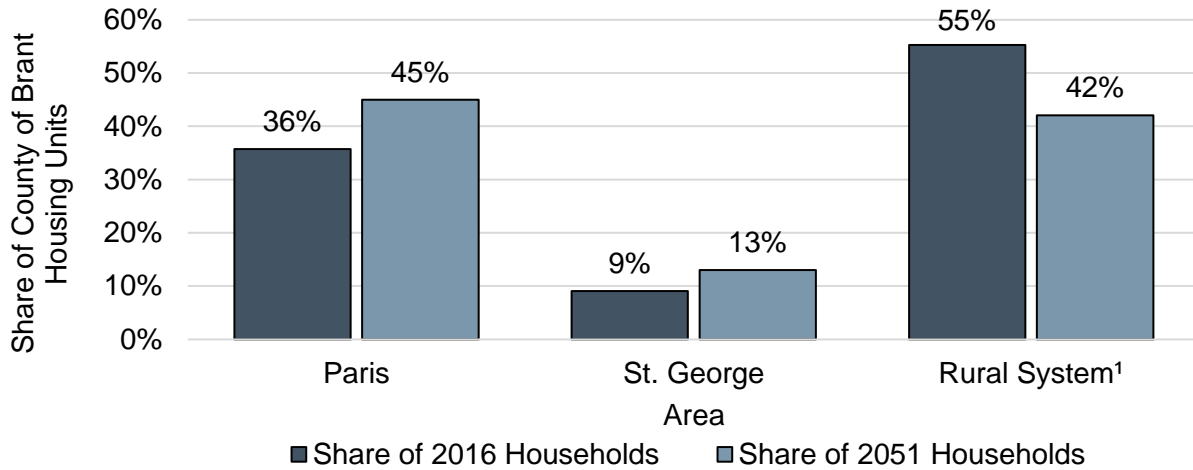
Figure 4-12
County of Brant
Housing Forecast by Primary Settlement Areas (Growth Centres) and Rural System

Year	Paris	St. George	Rural System ¹	County of Brant
2016	4,735	1,200	7,330	13,265
2051	9,870	2,850	9,225	21,940
2016 to 2051	5,135	1,650	1,895	8,675

¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
 Note: Figures may not add precisely due to rounding.
 Source: Based on County of Brant data as of December 2020.

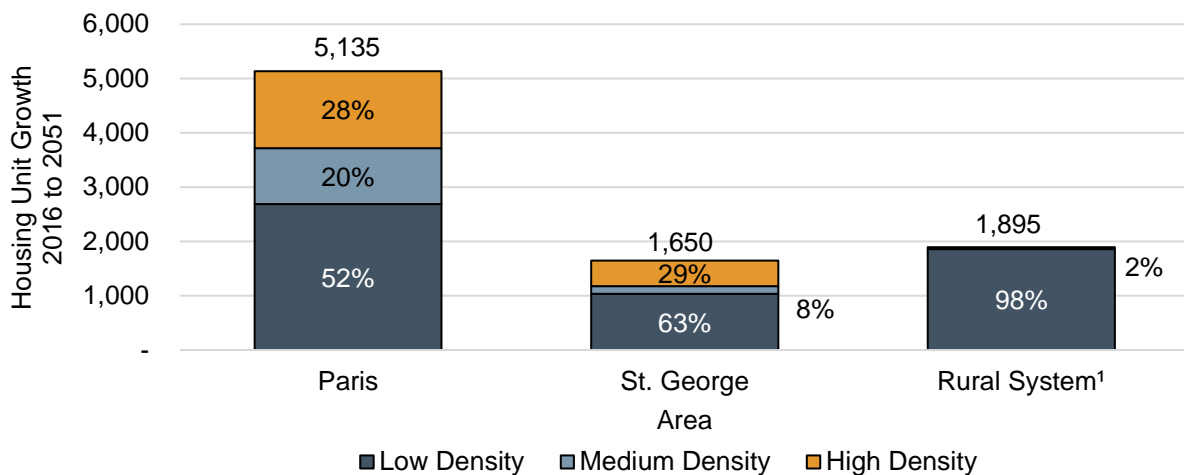


Figure 4-13
County of Brant
Share of County Housing Units in 2016 and 2051
By Primary Settlement Areas (Growth Centres) and Rural System



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
 Source: Watson & Associates Economists Ltd.

Figure 4-14
County of Brant
Housing Growth by Primary Settlement Areas (Growth Centres) and Rural System,
2016 to 2051



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
 Note: Figures have been rounded.
 Source: Watson & Associates Economists Ltd.



4.3 Intensification Analysis

4.3.1 *Defining Residential Intensification*

The Growth Plan considers any residential development within the delineated B.U.A. as intensification, which counts towards the intensification target. As previously discussed in Chapter 2, a B.U.A. was delineated for all urban settlements within the G.G.H. by the Province in 2006. The B.U.A. was based on the portion of the urban settlement that was primarily developed as of 2006. The remaining portion of the urban settlement outside the B.U.A. is referred to as the D.G.A. It is important to note that the delineation of the B.U.A. does not change over time.

As discussed in Chapter 2, the Growth Plan intensification target is a minimum and planning for a lower target requires an alternative request to be made to the Province. The intensification target is based on the minimum percentage of all residential development occurring annually within the delineated B.U.A. This target is measured from July 2022 to 2051. The start of the period in mid-2022 represents the required O.P. review completion deadline for all upper-tier and single-tier municipalities in accordance with the Growth Plan. The County of Brant is required to target or improve upon the existing intensification target set in the County's existing O.P. which is currently 15%.

Intensification can take many forms. The P.P.S., 2020 defines intensification as development of a property, site or area at a higher density than currently exists already. As previously discussed, intensification under the Growth Plan builds on the P.P.S. definition, but also includes all other residential development within the B.U.A. The following are examples of intensification forms:

- Development on vacant sites within the B.U.A.;
- Redevelopment, including the reuse of brownfield sites;
- Additional development on underutilized lots;
- Infill development, development on small vacant sites surrounded by developed parcels;
- Expansion or conversion of existing buildings (e.g., non-residential building converted to residential use); and
- Second Units (or Additional Residential Unit).



4.3.1.1 *Benefits of Residential Intensification*

Residential intensification provides an opportunity to broaden the choice of housing, particularly towards medium- and high-density housing forms in settings which are rich in urban amenities, such as downtown areas, as well as other potential redevelopment areas, which can encourage pedestrian friendly, healthy and complete communities. More specifically, residential intensification provides many potential benefits for the County of Brant including:

- Opportunities to promote “Place-Making”¹ and enhance the vibrancy of mature neighbourhoods and core areas by continuing to attract new residents as well as commercial investment;
- Supporting local businesses by increasing foot traffic;
- Creating active streets to promote healthier lifestyle options (i.e., pedestrian and cycling);
- Decreasing the number or length of automotive travel trips by providing housing opportunities for shopping and employment options closer to home;
- Reducing the County’s need to accommodate housing within existing greenfield areas and/or urban expansion areas;
- Expanding the housing options with a potential for higher density, or housing in a mixed-use environment; and
- Potential environmental impacts associated with reduced automobile dependency and urban land consumption.

4.3.1.2 *County of Brant Residential Intensification Trends*

Since 2006, a large portion of housing growth that occurred within the County’s B.U.A. primarily consisted of at-grade housing (singles, semi-detached and townhouses) that included the completion of later phases of subdivisions that were built after the delineation of the B.U.A. in 2006. Over the 2016 to 2020 period, approximately 29% of the County’s housing occurred within the B.U.A., representing approximately 69 housing units annually. It is important to recognize, however, that a large share of residential intensification the County has recently achieved has been associated with single-

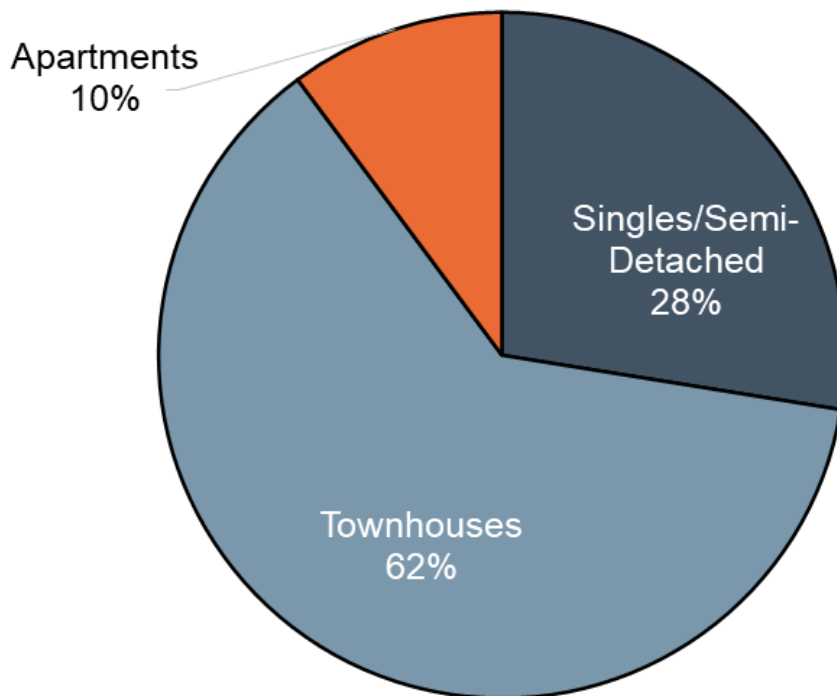
¹ Place-making is a process of creating unique, quality locations, places or spaces that possess a strong sense of place. With respect to places of work, the concept of place-making often encompasses the attraction of knowledge-based workers and businesses with an emphasis on collaboration, connection, and innovation.



detached housing development associated with the rounding out of low-density subdivisions since the creation of the B.U.A. in 2006. Over the long-term planning horizon, it is anticipated these opportunities will steadily diminish over time.

As summarized in Figure 4-15, residential housing growth over this most recent five-year period still includes a large portion of at-grade housing, approximately 90% of the housing development within the B.U.A. This housing growth primarily consisted of the completion of subdivisions, as well as 15 infill sites accommodating over 530 housing units on 20 ha of land. Examples of intensification development over the past five years is provided in Figure 4-16.

Figure 4-15
County of Brant
New Housing Unit Activity within the B.U.A.,
2016 to 2021



Source: Derived from the County of Brant building permit activity by Watson & Associates Economists Ltd. Based on occupancy of building permits issued between 2015 and 2020.



Figure 4-16
County of Brant
Examples of Intensification Developments in the B.U.A.



Re-purposed Apartments, Paris –
14 West River (56 units)



Townhouse Infill Development, Paris
– 23 & 59 Cedar St. (48 units)



Single/Semi/Townhouse Infill Development,
Paris – Willow Street Hampton Trails (24 units)



Townhouse Infill Development, Paris –
80 Willow Street (95 units)

4.3.1.3 *Housing Supply Opportunities within the B.U.A.*

As summarized in Figure 4-17, the County has approximately 1,165 residential housing units in the B.U.A. that are in the planning approval process (i.e., approved and proposed). This includes sites that can accommodate a mix of at-grade housing, such as single/semi-detached and townhouses. The largest development in the planning process in the B.U.A. is the approved residential development on the former Paris Golf Course lands with approximately 780 units. In addition to the units in the approvals process, the County has conducted a review of short-, medium- and long-term residential intensification supply opportunities within the Paris and St. George B.U.A. of sites that are not currently in the planning approval process. The County has identified 52 intensification sites within Paris and St. George (totalling 64 ha) that depending on



the density have the potential to accommodate between 2,820 and 4,940 residential units, as summarized in Figure 4-17, Table B.

Overall, the B.U.A. of Paris and St. George has the potential to accommodate up to 6,100 residential units, as summarized in Figure 4-17, Table C.

Figure 4-17
County of Brant
B.U.A.
Residential Housing Unit Potential

Table A: Approved/Proposed	Low-Density Units	Medium-Density Units	High-Density Units	Total Units
Paris	463	275	343	1,081
St. George	0	0	84	84
Total	463	275	427	1,165

Table B: Additional Intensification Opportunities	Low-Range Yield Units	High-Range Yield Units
Paris	1,739	3,045
St. George	1,079	1,890
Total	2,818	4,935

Table C: Total Intensification Potential	Low-Range Yield Units	High-Range Yield Units
Total Intensification Potential (Table A + B)		
Paris	2,820	4,126
St. George	1,163	1,974
Total	3,983	6,100

Source: Based on County of Brant residential supply. Data summarized by Watson & Associates Economists Ltd.



Figure 4-18a
County of Brant
Paris B.U.A.
Residential Housing Unit Intensification Potential

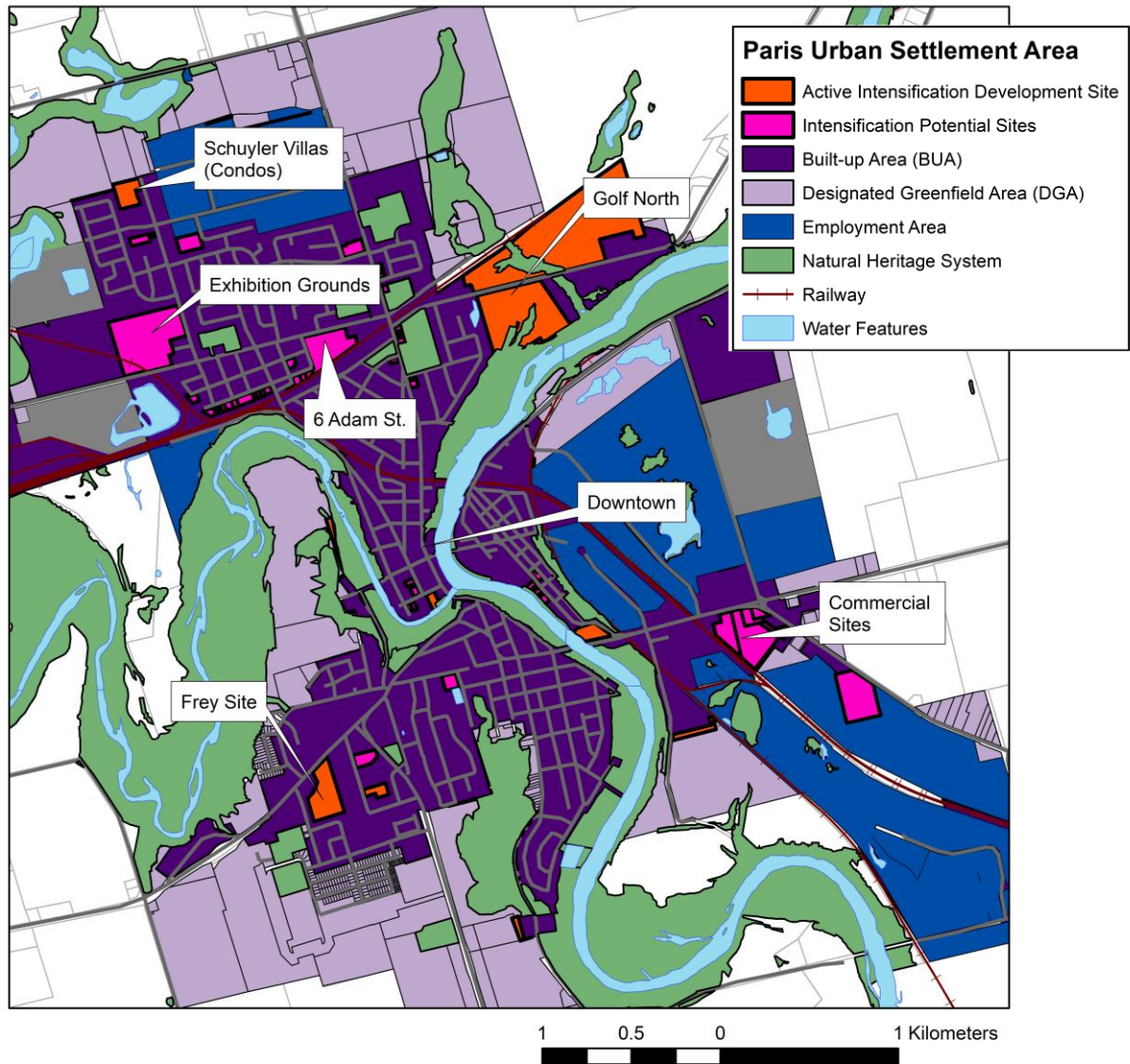
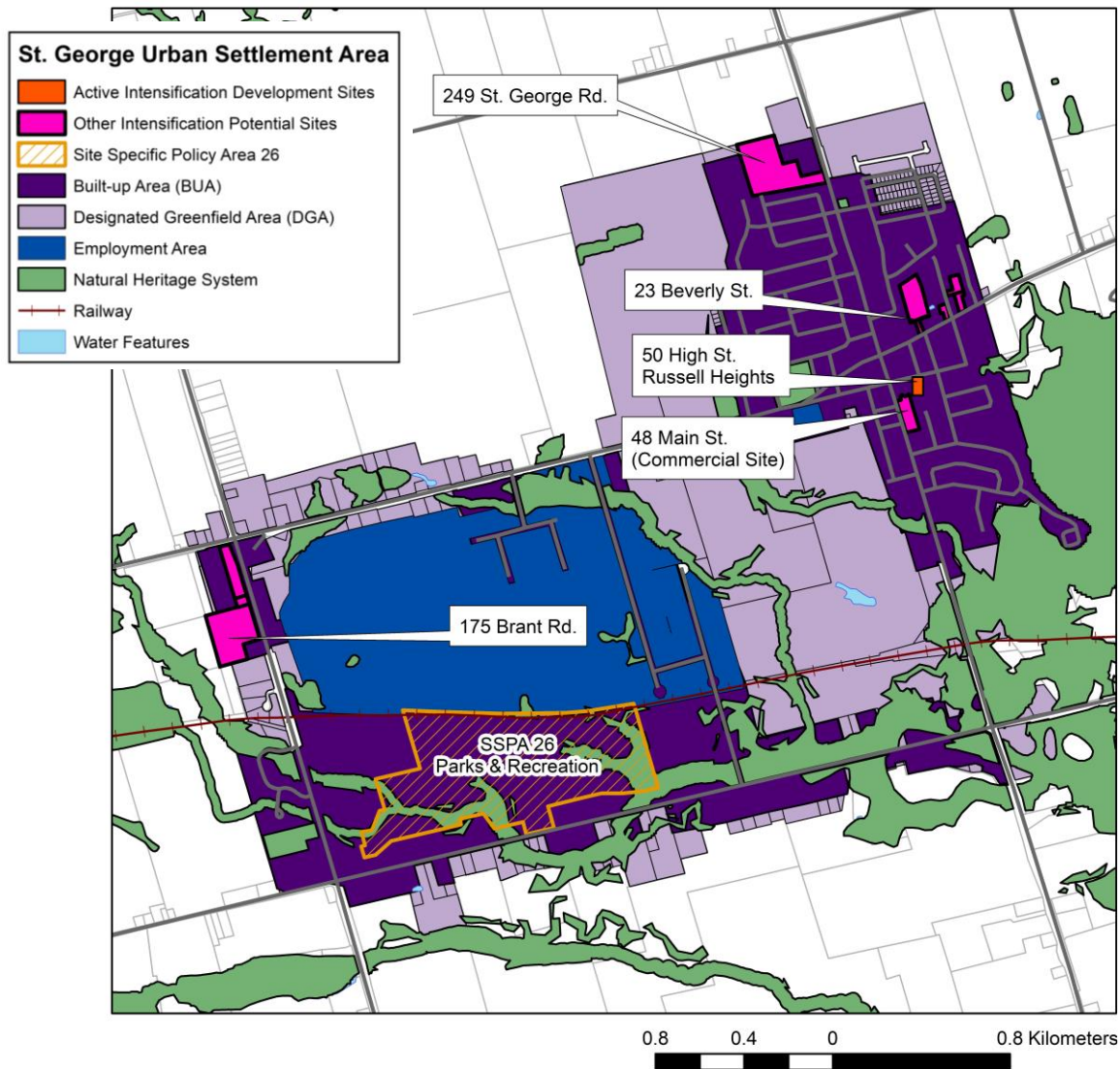




Figure 4-18b
County of Brant
St. George B.U.A.
Residential Housing Unit Intensification Potential



4.3.1.4 Second Unit Opportunities

Opportunities to accommodate future housing growth through second units is an important consideration. The More Homes, More Choice: Ontario's Housing Supply Action Plan, 2019 and *Bill 108, More Homes, More Choice Act, 2019* emphasize to decision-makers that affordable housing is a key priority for the Province. In accordance with the Act, municipalities are required to establish O.P. policies and



zoning by-law provisions allowing second units in detached, semi-detached and row houses, as well as in ancillary structures. Brant’s mature neighbourhoods are characterized by a significant share of low-density housing, conducive to the development of second units. Second units offer an effective means to achieve intensification. Over the forecast horizon, it is assumed that the County’s D.G.A. and Rural Area will also provide opportunities for second suites. A second unit forecast has been prepared based on available C.M.H.C. survey data on the average shares in the municipalities of the surrounding area (e.g., City of Brantford and City of Hamilton).¹ It is estimated that approximately 3% of low-density housing units forecast by 2051 in the County of Brant would accommodate second units. Based on this assumption, approximately 520 second units (17 units annually) are anticipated to be accommodated in the County by 2051. As summarized in Figure 4-19, approximately 55% would be accommodated in the B.U.A., 25% in the D.G.A. and 20% in the Rural Area. It is important to note that secondary units have a high-density occupancy but are a grade-related housing form. For the purposes of forecasting and land needs presented herein, all secondary units are captured as high density.

Figure 4-19
County of Brant
Second Unit Forecast, 2021 to 2051

Second Unit Forecast	Total Housing Units	Annual Housing Units
Low-Density Housing Units at 2051	17,490	
Estimated Low-Density Units Accommodating Second Units at 2051 (3%)	520	
B.U.A. Share of Total Second-Unit Forecast, 2021-2051 (55%)	286	10
D.G.A. Share of Total Second-Unit Forecast, 2021-2051 (25%)	130	4
Rural Area Share of Total Second-Unit Forecast, 2021-2051 (20%)	104	3
Total Second Units, County-Wide, 2051	520	17

Source: Watson & Associates Economists Ltd.

¹ CMHC, Housing Market Insight Ontario, Secondary Suites in Ontario, June 2021, Table 1. CMHC report is based on 2019 survey completed.



4.3.1.5 Intensification Target and Housing Forecast in B.U.A.

As previously noted, the County has a current intensification target of 15% of housing annually within the B.U.A. The B.U.A. in Paris, and to a lesser extent, St. George offers an opportunity to accommodate a wide range of housing options (low, medium, and high density). As well, the active planning applications/approved developments suggest the County can achieve at least 48 units annually in the B.U.A. Accordingly, it is recommended that the County target a higher intensification rate of 20% of housing growth within the B.U.A.

Figure 4-20
County of Brant
Residential Housing Forecast by Policy Area, 2022 to 2051

Area	B.U.A.	D.G.A.	Rural	Total	B.U.A.	D.G.A.	Rural	Total
Paris	1,305	2,777	0	4,080	32%	68%	0%	100%
St. George	84	1,476	0	1,560	5%	95%	0%	100%
Total Urban Area	1,389	4,253	0	5,640	25%	75%	0%	100%
Rural Area	0	0	1,200	1,200	0%	0%	100%	0%
County-Wide	1,389	4,253	1,200	6,840	20%	62%	18%	100%
Shares	20%	62%	18%	100%	20%	62%	18%	100%

Note: Totals have been rounded and may not add up precisely. Second units are embedded in the above figure.

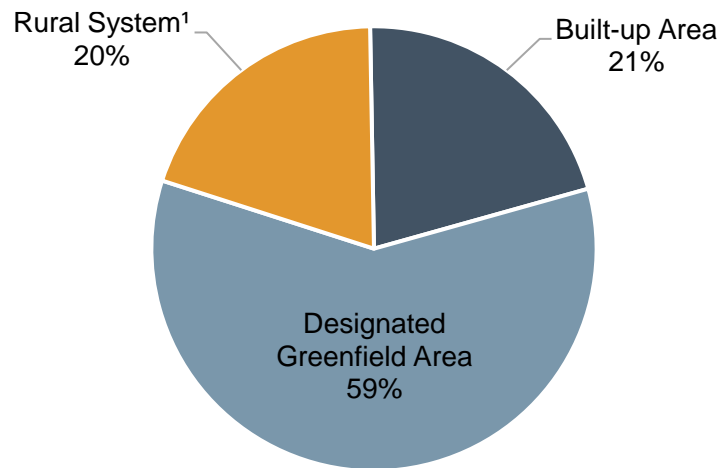
Source: Watson & Associates Economists Ltd.

4.4 Population and Housing Forecast by Policy Area (B.U.A./D.G.A.) to 2051

As previously discussed, most of the County's population and housing growth is directed to Urban Settlement Areas with municipal servicing. As summarized in Figure 4-21, 80% of population growth is anticipated to be accommodated within the County's Urban System from 2016 to 2051, of which 59% is in the D.G.A. and 21% in the B.U.A. The remaining 20% of population growth is to be accommodated within the County's Rural System. It is anticipated that the County will shift more towards an increasingly concentrated population within the Urban Settlement Areas, enlarging the County's Urban System population base share of 42% in 2016 to 56% by 2051.



Figure 4-21
County of Brant
Population Growth by Policy Area (B.U.A./D.G.A.)
2016 to 2051



¹ The Rural System includes Secondary Settlement Areas, Hamlets and Other Rural.
Source: Watson & Associates Economists Ltd.

4.5 Observations

Over the forecast horizon, it is anticipated that the County's two Primary Settlement Areas (Growth Centres), as well as its Secondary Settlement Areas, hamlets and remaining rural areas, will all continue to experience housing growth. The Urban Settlement Area of Paris, located in the northern portion of the County just outside the City of Brantford, is anticipated to accommodate a large portion of the County's population growth (60%) over the long-term planning horizon. The Urban Settlement Area of St. George is anticipated to accommodate approximately one-fifth of the County's population growth (20%), while the Rural System is also anticipated to accommodate one-fifth of the County's population growth (20%). A lack of municipal water servicing is expected to limit future residential development within the County's Secondary Settlement Areas and Hamlet Areas.

Over the forecast horizon, it is anticipated that the County will become increasingly more urban. As of 2016, approximately 42% of the County's population is within the Urban System, while 58% of the County's population is within the Rural System. Looking forward, it is anticipated that by 2051, approximately 58% of the County's



population base will be concentrated within the Urban System, which includes Paris and St. George. It is anticipated that the Urban System within the County will accommodate an additional 16,800 persons by 2051. As a comparison, this growth increment is greater than the estimated Urban System population base as of 2016 (2016 population within the Urban System is estimated at 16,000). It is anticipated that the County's Urban Settlement Areas will play an increasing role in broadening future housing options available within the County with respect to housing by structure type. Chapter 5 explores the urban land requirements to accommodate future urban growth within the existing settlement boundaries of the Urban Settlement Areas.

It is recommended that the County target a higher intensification rate of 20% of housing growth within the B.U.A. The B.U.A. in Paris, and to a lesser extent, St. George offers an opportunity to accommodate a wide range of housing options (low, medium, and high density). As well, the active planning applications/approved developments suggest that the County can achieve at least 48 units annually in the B.U.A.



Chapter 5

Community Area Land Needs Assessment



5. Community Area Land Needs Assessment

5.1 Introduction

5.1.1 L.N.A. Methodology

As previously discussed in Chapter 2, the Minister formally issued the final L.N.A. methodology on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.¹ Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019 to assess the quantity of land required to accommodate forecast growth.

As previously discussed, the L.N.A. methodology identifies that the results of a land needs assessment can only be implemented through an M.C.R. As previously stated, an M.C.R. is a new O.P. or an O.P.A. initiated by an upper- or single-tier municipality under section 26 of the *Planning Act*, which comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas within the urban system including **Community Areas** and **Employment Areas**. It is important to recognize that the provincial L.N.A. methodology focuses on the urban system, where there are settlement areas with servicing and urban amenities that support the growth management policies of the Growth Plan.

Provided below is a summary of the two areas that are reviewed for land requirements.

“Community Areas: Areas where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment land employment jobs. Community areas include delineated built-up areas [B.U.A.] and the designated greenfield area [D.G.A.] (excluding employment areas).

Employment Areas: Areas where most of the employment land employment (employment in industrial-type buildings) jobs are, as well as some office jobs and some population-related jobs, particularly those

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



providing services to the employment area. Employment areas (including prime employment areas) may be located in both delineated built-up areas [D.G.A.] and the designated greenfield area [D.G.A].”

This chapter reviews the Community Area land needs within the Urban System (Paris and St. George), specifically the D.G.A. portion of the Community Area, as identified in light purple in Figures 5-1 and 5-2.

Figure 5-1
County of Brant
Paris D.G.A.

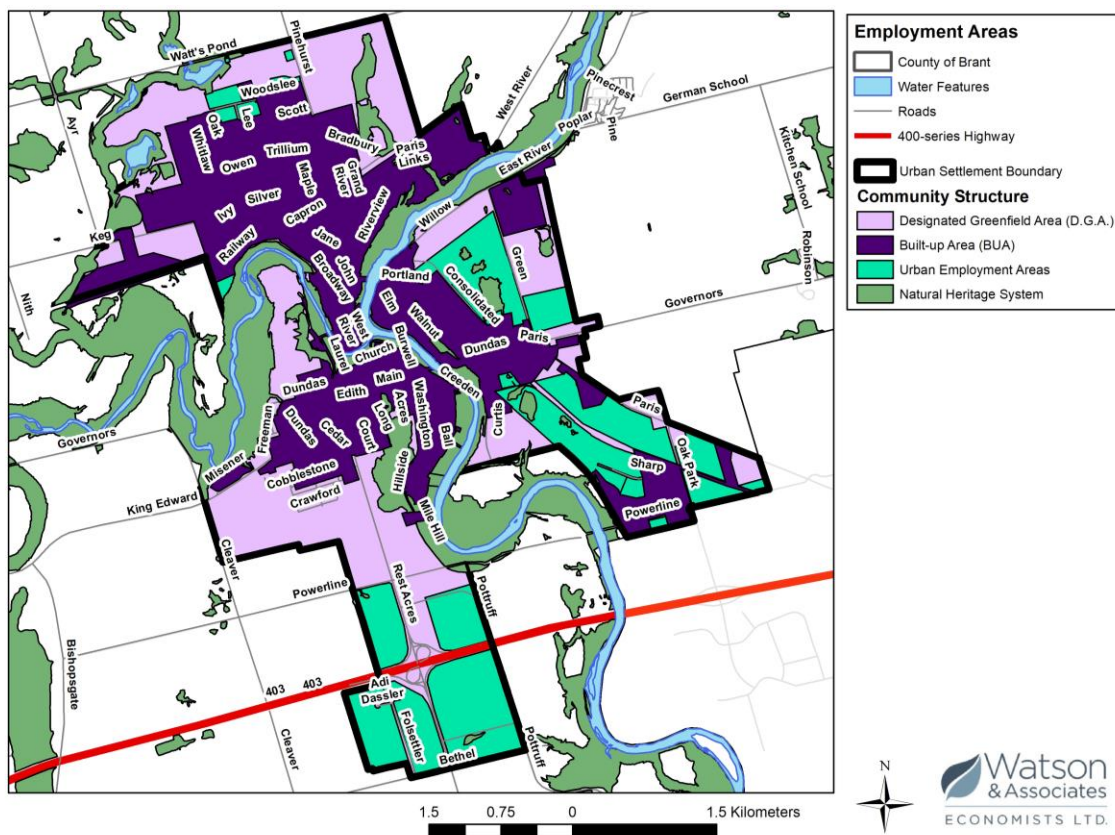
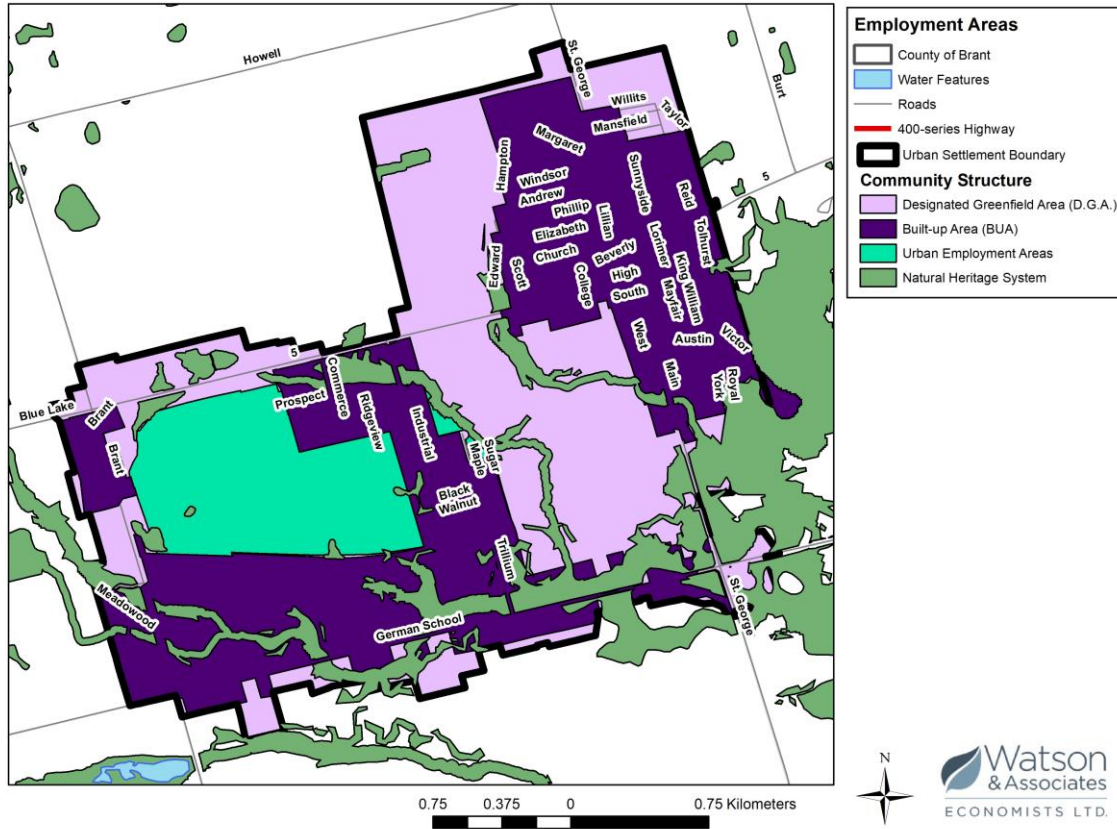




Figure 5-2
County of Brant
St. George D.G.A.



In total, the L.N.A. methodology provides six key components in establishing Community Area land needs. The previous chapters form the first five components of the L.N.A. for Community Area land needs. This chapter summarizes the last component of the L.N.A. for Community Area land needs. It should be noted that the population-related employment (P.R.E.) component of the L.N.A. for Community Area land needs is summarized in this chapter. More details on P.R.E. are provided in Chapter 6 within the context of the broader discussion of the County's employment forecast and employment growth allocations.



5.2 Designated Greenfield Area Land Supply

5.2.1 D.G.A. Land Supply Methodology

The provincial L.N.A. methodology requires an assessment of land needs be carried out based on the calculation of the total D.G.A. gross developable land area in accordance with the Growth Plan, 2019. The first step in calculating the D.G.A. land supply is to identify the total gross developable land within the Community Area D.G.A., as well as lands that support the function of this area, including non-residential lands (e.g., lands that accommodate P.R.E.), local roads, parks/trails, recreational lands/facilities and local infrastructure (e.g., stormwater ponds). Environmental features identified as Natural Heritage System in the County's mapping are excluded from the land supply. Other exclusions include the land area accommodating highways, utility corridors and cemeteries, as these land features support the broader area. County of Brant geographic information systems (G.I.S.) data was utilized to calculate the land supply.

It is important to recognize that the D.G.A. land supply includes developed and vacant lands and, therefore, requires an analysis to determine the total amount of population and P.R.E. the D.G.A. can accommodate at its fully developed state or by 2051. The people and jobs density is a key component in determining the yield of population and employment the D.G.A. can support by 2051.

5.2.2 D.G.A. Land Supply by Status

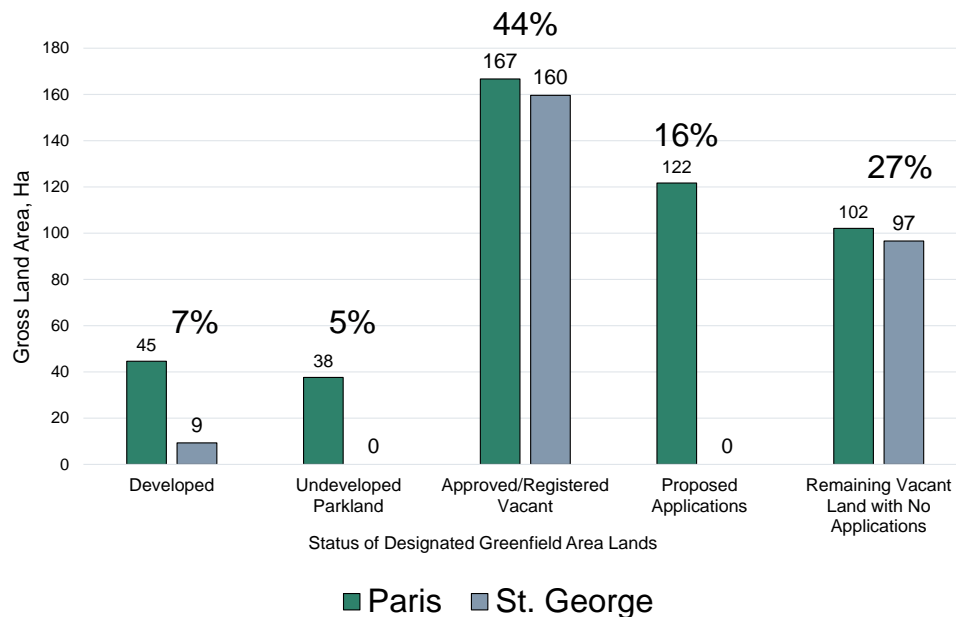
Figure 5-3 provides a summary of the D.G.A. land supply by status, while Appendix D provides detailed mapping of the D.G.A., identifying the approximate land area of the D.G.A. in large D.G.A. blocks. This analysis was carried out in January 2020, based on a comprehensive review of building permit data and active applications. Again, it is important to note that the land needs assessment is based on total designated land area and total people and jobs at 2051; therefore, updating the base to reflect new growth and development is not necessary. This analysis is used primarily to understand density.

As identified in Figure 5-3, the County has 739 ha of D.G.A. lands. Approximately 54 ha or 7% of the D.G.A. is developed, while 327 ha or 44% of the land area is anticipated to accommodate approved developments (registered and draft approved). These two status categories, represent just over half (51%) the D.G.A. land category and provide



greater certainty with respect to calculating the average forecast residential density and population yield. The remaining vacant D.G.A. lands provide a greater opportunity to adjust average density levels and include lands with proposed development applications (16%), lands with no applications (27%), and undeveloped parkland (5%).

Figure 5-3
County of Brant
D.G.A. Land Supply by Status, January 2020



Note: Proposed applications exclude conversion requests.

Source: Watson & Associates Economists Ltd. based on County of Brant planning application developed.

5.2.3 Developed and Approved Developments in the D.G.A.

As previously mentioned, approximately 54 gross ha of D.G.A. lands within the County are developed. As summarized in Figure 5-5, these developed lands accommodate approximately 2,100 people and jobs and generate an average density of 39 people and jobs/gross ha. Density ranges from 35 to 57 people and jobs/ha in D.G.A. neighbourhoods. The Paris Sport Centre has a density of 12 jobs/ha. Overall, the D.G.A. in Brant is tracking close to the Growth Plan density target of 40 people and jobs/ha by 2051.



Figure 5-5a
County of Brant
Paris and St. George
Developed D.G.A. Land Area, ha, January 2020

Subdivision Name	Location Description	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units	Total People and Jobs	Total Gross Land Area (ha)	People and Jobs Density (p&j/ha)
Paris - Brookfield Subdivision - Phase 1	Paris - North	68	67	0	135	455	8	57
Freeman St./Farrugie St.	Paris - West	44	0	0	44	176	4	50
Cobblestone/Grandview (North of Arlington Parkway)	Paris - South	120	32	0	152	753	21	36
Mile Hill	Paris - West	57	0	0	57	223	6	35
Riverview	Paris - East	23	0	0	23	86	2	44
Paris Sports Centre	Paris - South	0	0	0	0	45	4	12
Total Paris		312	99	0	411	1,738	45	39
Sunnyside Drive	St. George - North	105	0	0	105	365	9	39
Total St. George		105	0	0	105	365	9	39
Total County of Brant D.G.A.		417	99	0	516	2,103	54	39

Source: Watson & Associates Economists Ltd.

The following figures provide a map of the developed D.G.A. lands relative to the rest of the D.G.A. As shown, most of the D.G.A. lands, especially within St. George, are undeveloped.



Figure 5-5b
County of Brant
Paris
Developed D.G.A. Land Area, ha, January 2020

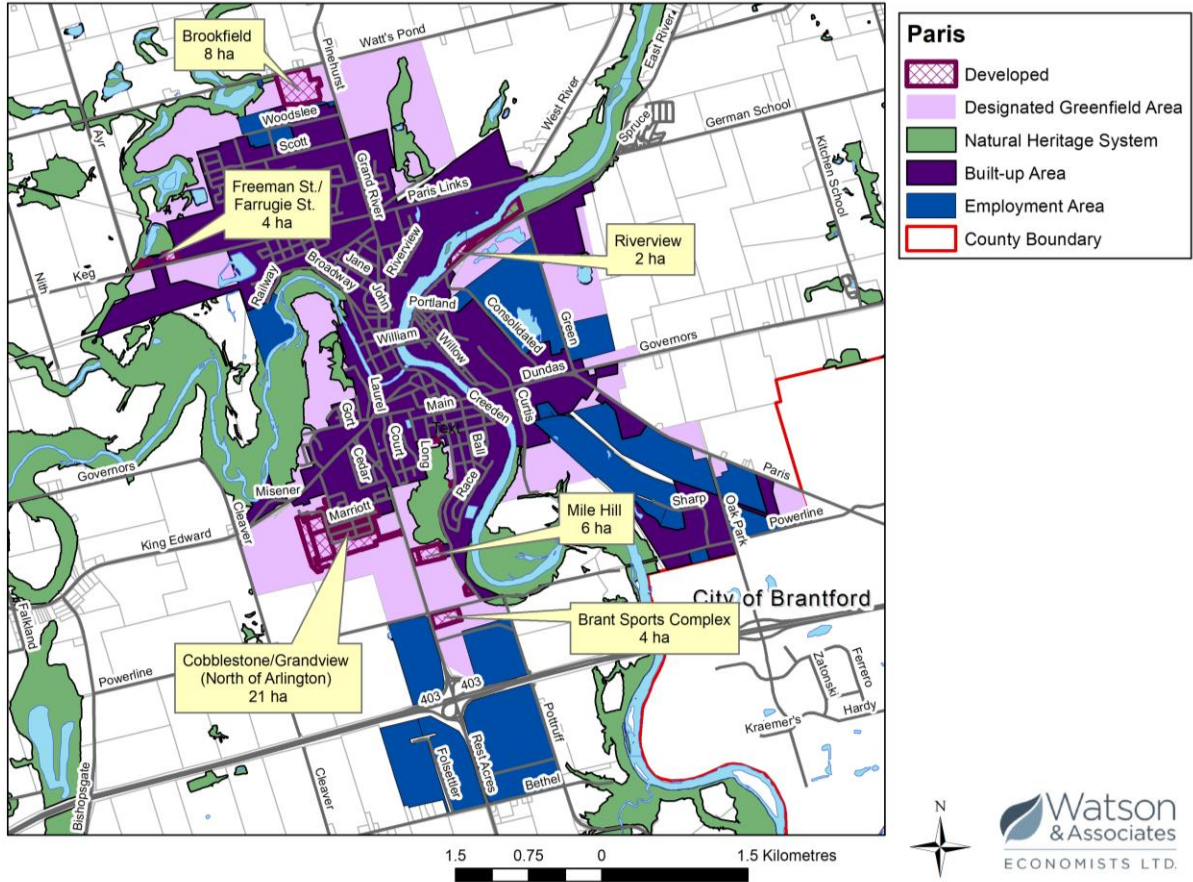
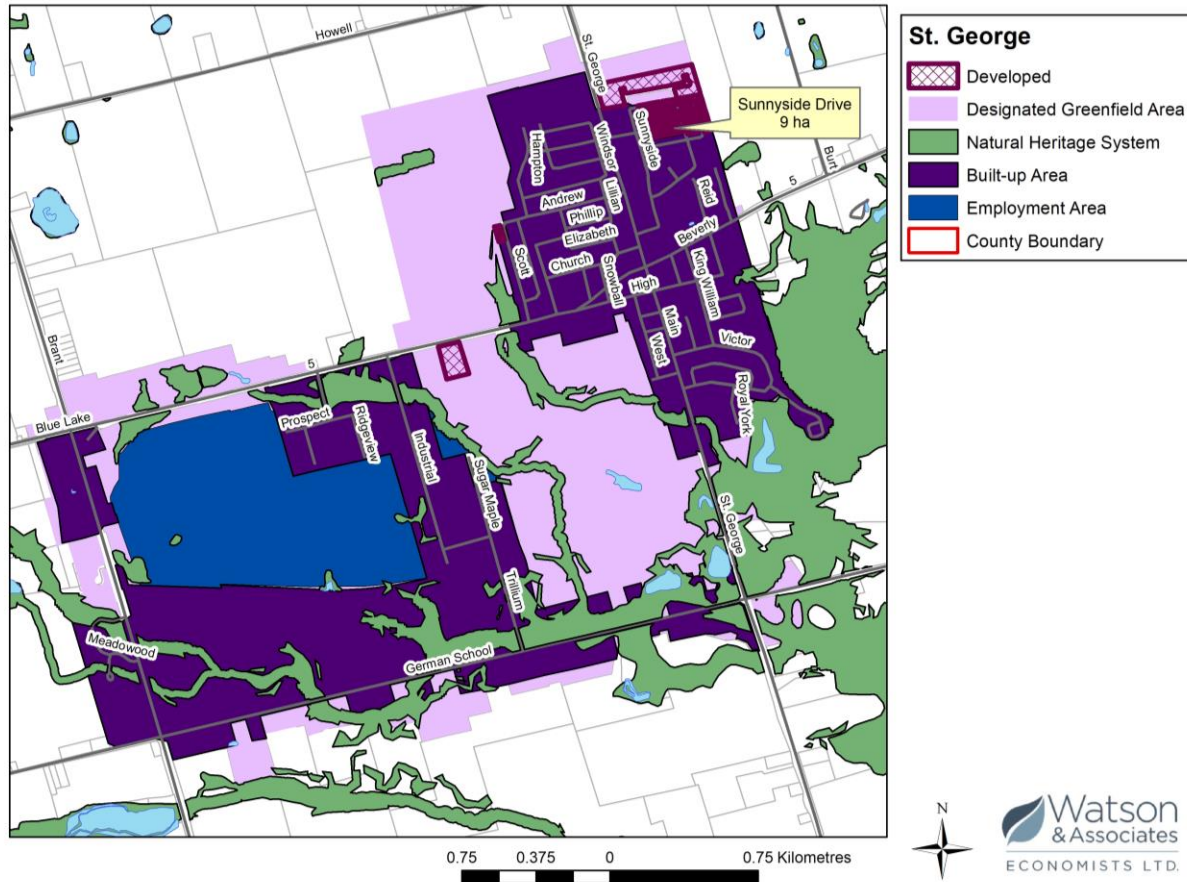




Figure 5-5c
County of Brant
St. George
Developed D.G.A. Land Area, ha, January 2020



Based on a review of approved developments in the D.G.A., the County is anticipated to exceed the Growth Plan target. Based on what is currently developed and what is approved, the County is anticipated to reach a density of 52 people and jobs/ha, as summarized in Figure 5-6, which represents approximately 51% of the D.G.A. land area. The developed and approved lands are anticipated to accommodate 6,540 housing units and a people and jobs base of 19,600 by 2051.



Figure 5-6
County of Brant
Paris and St. George
Developed and Approved Yields on D.G.A. Lands, January 2020

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	417	99	0	516	54	1,620	2,100	39
Draft Approved/Registered	3,669	844	1,511	6,024	326	16,950	17,500	54
Developed & Draft Approved/Registered	4,086	943	1,511	6,540	380	18,570	19,600	52

Source: Watson & Associates Economists Ltd.

Appendix D provides additional mapping identifying lands with approved and proposed developments, as well as a breakdown of the above figure for Paris and St. George.

5.3 D.G.A. Land Needs

5.3.1 D.G.A. Housing and Employment Growth Forecast to 2051

Figure 5-7 provides the housing, population and employment forecast for Paris and St. George. Key highlights include:

- The D.G.A. at 2051 is anticipated to add approximately 4,680 units, bringing the total units in the D.G.A. to 5,190 units by 2051. This is less growth than the previously discussed active development pipeline, which has the potential to accommodate an additional 6,020 units. The difference is largely due to long-term demand considerations. It is recommended that the County monitor the rate of growth and review servicing constraints in St. George, and consider any adjustments by the next M.C.R.
- By 2051, it is anticipated that the D.G.A. will accommodate a population base of 14,100 persons, just under a quarter (24%) of the County's population base by 2051.



Figure 5-7
 County of Brant
 Paris D.G.A.
 Housing and Population Forecast by 2051

Year	Population (Including Census Undercount)	Households			
		Low Density	Medium Density	High Density	Total
2020	1,300	310	100	0	410
2051	9,900	2,405	605	630	3,640
2020-2051	8,600	2,095	505	630	3,230

Source: Watson & Associates Economists Ltd.

Figure 5-8
 County of Brant
 St. George D.G.A.
 Housing and Population Forecast by 2051

Year	Population (Including Census Undercount)	Households			
		Low Density	Medium Density	High Density	Total
2020	400	105	0	0	105
2051	4,200	1,050	120	385	1,555
2020-2051	3,800	945	120	385	1,450

Source: Watson & Associates Economists Ltd.

Figure 5-9
 County of Brant
 St. George and Paris
 Housing and Population Forecast by 2051

Year	Population (Including Census Undercount)	Households			
		Low Density	Medium Density	High Density	Total
2020	1,700	415	100	0	515
2051	14,100	3,455	725	1,015	5,195
2020-2051	12,400	3,040	625	1,015	4,680

Source: Watson & Associates Economists Ltd.



5.3.2 Community Area Employment in the D.G.A.

Over the forecast, it is assumed that 1 P.R.E. job is required for every 4.5 residents in the D.G.A. Compared to the B.U.A., fewer P.R.E. jobs relative to the population base are anticipated on D.G.A. lands. Work at home employment is forecast to represent a larger component of P.R.E. in the D.G.A. compared to the B.U.A. The D.G.A. currently has a small commercial and institutional base (less than 500 jobs) on which to build. Further, based on a review of commercial site opportunities within the B.U.A., there are significant opportunities for new commercial development on vacant sites, as well as an opportunity for intensification. The majority of P.R.E. has been allocated to the B.U.A. at approximately 60%. This is discussed further in Chapter 6. By 2051, it is forecast that approximately 3,100 jobs will be accommodated within the D.G.A.

5.3.3 D.G.A. Land Needs to 2051

Figure 5-10 identifies the Community Area land needs for Paris and St. George. Key highlights include the following:

- As summarized in Figure 5-10, the County is anticipated to accommodate a population and employment base in the D.G.A. of 17,200 by 2051.
- As previously discussed, the County is anticipated to achieve a density of 50 people and jobs/ha by 2051, based on a review of existing development and approved development applications.
- The D.G.A. has a supply of 739 gross ha of developable land, which is greater than the land requirement of 344 gross ha to accommodate 17,200 people and jobs. As a result, the County is estimated to have a surplus of Community Area land of approximately 395 gross ha.



Figure 5-10
County of Brant
Paris and St. George
Community Area Land Needs to 2051

Community Area Land Needs		Paris D.G.A.	St. George D.G.A.	Total D.G.A.
Total D.G.A. Population and Employment Forecast at 2051	A	12,100	5,100	17,200
People and Jobs Density/gross ha	B	50	50	50
Land Requirement, gross ha	$C = A / B$	242	102	344
Total D.G.A. Land Area, gross ha	D	473	266	739
Land Surplus at 2051, gross ha	$E = D - C$	231	164	395

Source: Watson & Associates Economists Ltd.

5.3.4 Excess Community Area Lands

As previously discussed, the County has a surplus of 395 ha of D.G.A. Community Area lands. Figures 5-11 and 5-12 are maps that identify the excess lands in Paris and St. George. It is important to note that the maps identify large tracts of lands (larger than 5 ha) that are considered excess.

As identified on Figure 5-11, the excess lands within Paris primarily include D.G.A. Community Area lands designated Urban Residential that are vacant with no approvals in place (e.g., registered unbuilt and draft approved), totalling 187 ha.

D.G.A. Community Area lands designated Commercial along the Paris Road corridor are considered excess, totalling 14 hectares. Chapter 6 provides a further discussion on the commercial land needs. As discussed in that Chapter, Paris has an estimated surplus of 31 ha of designated commercial lands. Figure 5-11 does not identify all excess D.G.A. Community Area lands that are designated Commercial. It is important that the County retain some surplus commercial lands to support a range of commercial options for residents across Paris.

D.G.A. lands identified as excess in St. George include all D.G.A. lands outside approved development site areas. As previously discussed, St. George has a municipal servicing constraint.



These excess lands are not considered to be needed until the post-2051 period and will be subject to ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered interchangeable with the identified shortfall of Urban Employment Areas discussed in Chapter 6. It is recommended that the County's new O.P. identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.

Figure 5-11
County of Brant
Paris
D.G.A. Community Area Excess Lands to 2051

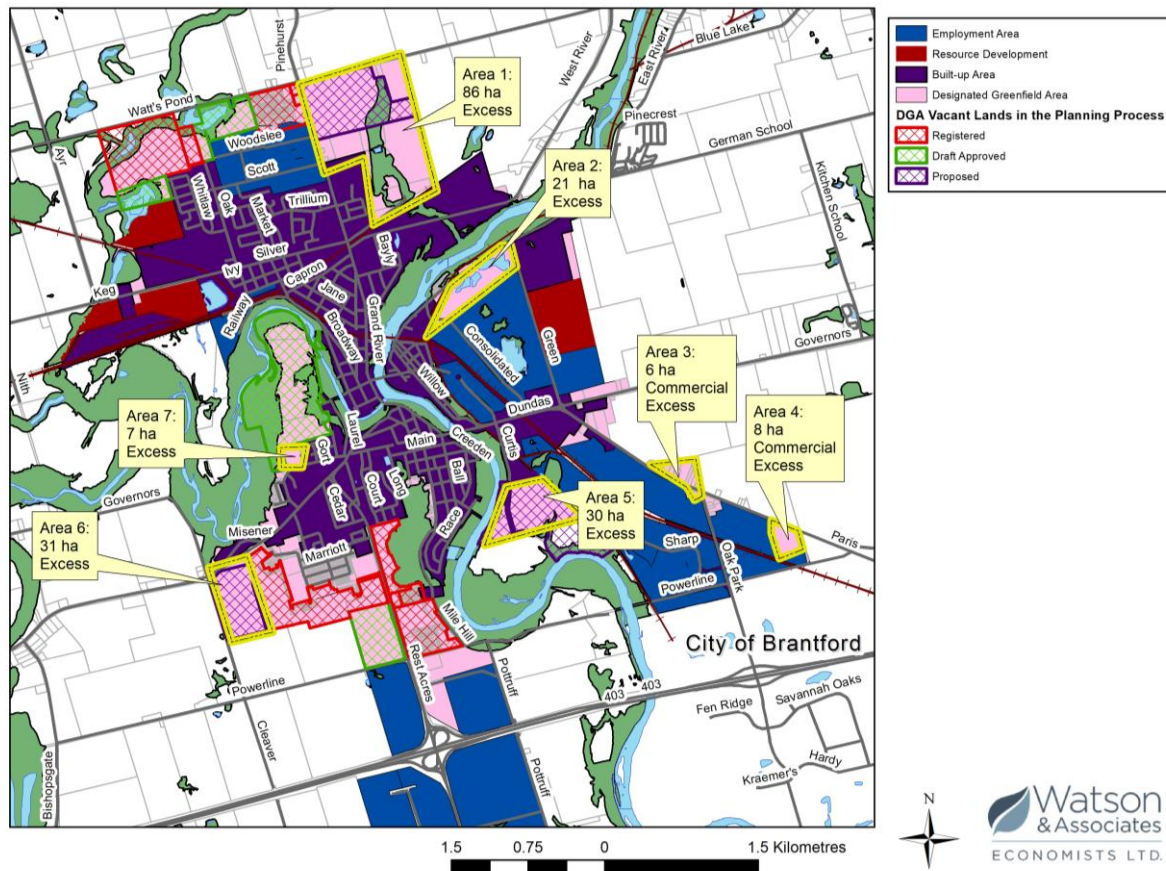
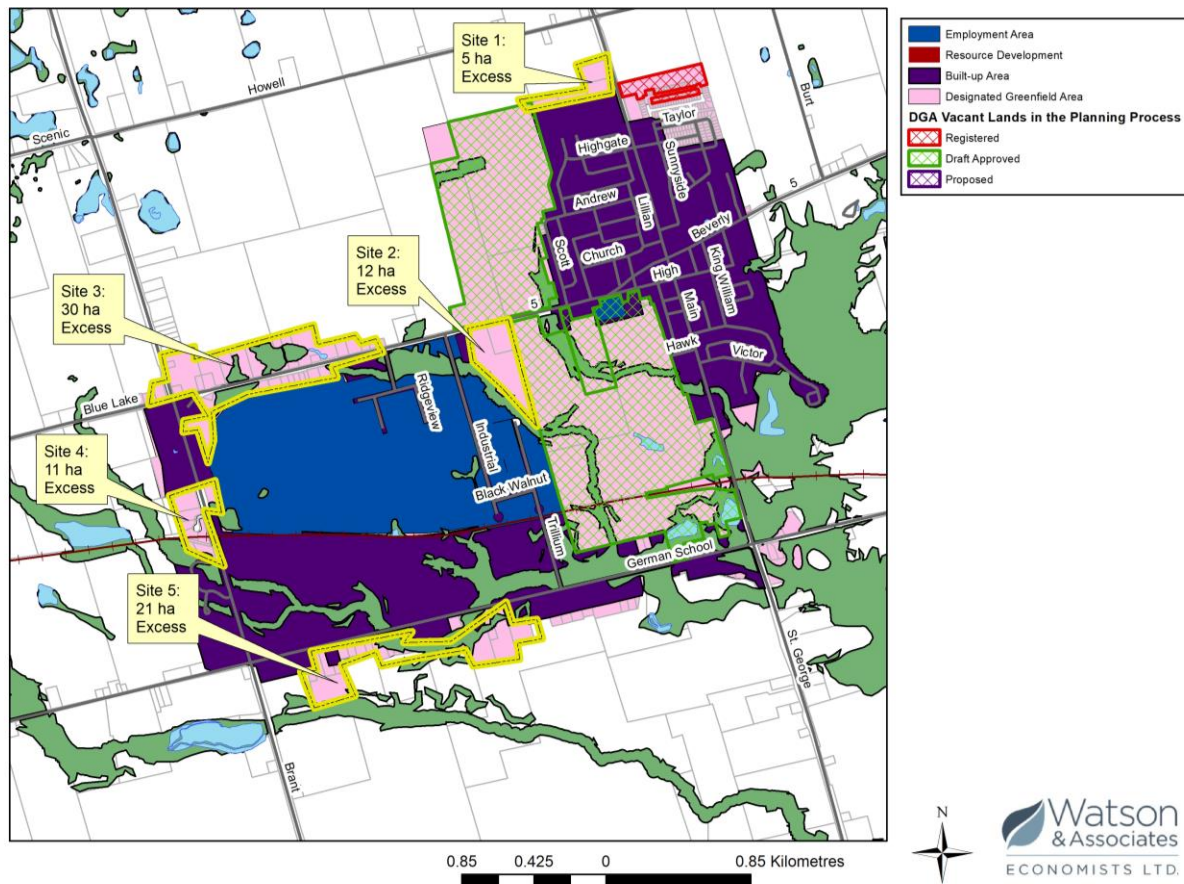




Figure 5-11
County of Brant
St. George
D.G.A. Community Area Excess Lands to 2051



5.3.5 Observations

The County has a robust supply of potential housing development in the planning approvals process (i.e., development pipeline). The County's supply of housing in the development pipeline is anticipated to accommodate a greater range of housing options compared to the existing D.G.A. base.

Based on the comprehensive analysis carried out herein, it has been determined that the County has a surplus of Community Area land of approximately 395 gross ha to 2051. These surplus lands are not considered to be needed until the post-2051 period, and will be subject to ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered



interchangeable with the identified shortfall of Urban Employment Areas discussed in Chapter 6. It is recommended that the County's new O.P. identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.



Chapter 6

Employment Analysis



6. Employment Analysis

6.1 Introduction

This chapter provides an assessment of historical and forecast employment growth trends for the County of Brant to the year 2051 within the broader context of the G.G.H. and the Province of Ontario, based on recent Statistics Canada data as well as other available information sources. A commentary is also provided on key drivers and disruptors anticipated to impact employment and shape the development patterns of the Commercial and Employment Areas of the County's Urban System. This review has been prepared to provide insight with respect to the County's long-term employment forecast to 2051 by employment category, and ultimately by location (Urban Employment Area, Urban Community Area, Rural Employment Area and Remaining Rural Area). The employment forecast is further allocated by the Primary Settlement Areas (Urban System) and Rural System in this chapter, and Employment Area land needs are provided.

6.1.1 Employment Land-Use Categories

The long-term employment forecast prepared herein includes a breakdown of employment by category, including P.R.E., urban employment lands employment (E.L.E.), rural E.L.E. and other rural employment. These employment categories, as defined by the Province, are generally based on built-form and land-use characteristics. The majority of the County's industrial sector employment is accommodated in industrial-type buildings, referred to as E.L.E. The County's commercial and institutional sector employment is generally accommodated in commercial and institutional-type buildings, referred to as P.R.E. Given the importance and relative magnitude of E.L.E. within the County's rural areas, this report further breaks down E.L.E., as urban E.L.E. (employment within Primary Settlement Areas (Growth Centres)) and rural E.L.E. (employment outside Primary Settlement Areas (Growth Centres)).

The following is a summary of the employment categories in accordance with the provincial L.N.A.



6.1.1.1 Urban Population-Related Employment (P.R.E.)

Urban P.R.E. includes employment in institutional and commercial sectors not accommodated within industrial-type buildings (E.L.E.). Commercial and institutional sector employment in industrial-type buildings (e.g., retail tenant in a multi-tenant industrial building) represents a small share of the County's E.L.E. Work at home employment is also captured as P.R.E. within the County of Brant. Urban P.R.E. is located within the County's Primary Settlement Areas (Growth Centres) and is largely accommodated in downtown cores, commercial nodes and corridors along arterial roads, neighbourhood plazas, schools, and standalone institutional and retail buildings.

6.1.1.2 Urban Employment Lands Employment (E.L.E.)

Urban E.L.E. represents jobs accommodated in industrial-type buildings within Primary Settlement Areas (Growth Centres). This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities as well as a limited amount of employment associated with office commercial and employment-supportive uses. E.L.E. includes a very small portion of employment in the commercial and institutional sectors.

6.1.1.3 Rural Employment Lands Employment (E.L.E.)

Rural E.L.E. represents jobs accommodated in industrial-type buildings outside of Primary Settlement Areas (Growth Centres). This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities as well as a limited amount of employment associated with office commercial and employment-supportive uses. Rural E.L.E. is predominantly comprised of industrial sector employment, with a small portion of commercial and institutional employment accommodated in rural industrial-type buildings, referred to as rural E.L.E.

6.1.1.4 Other Rural Employment

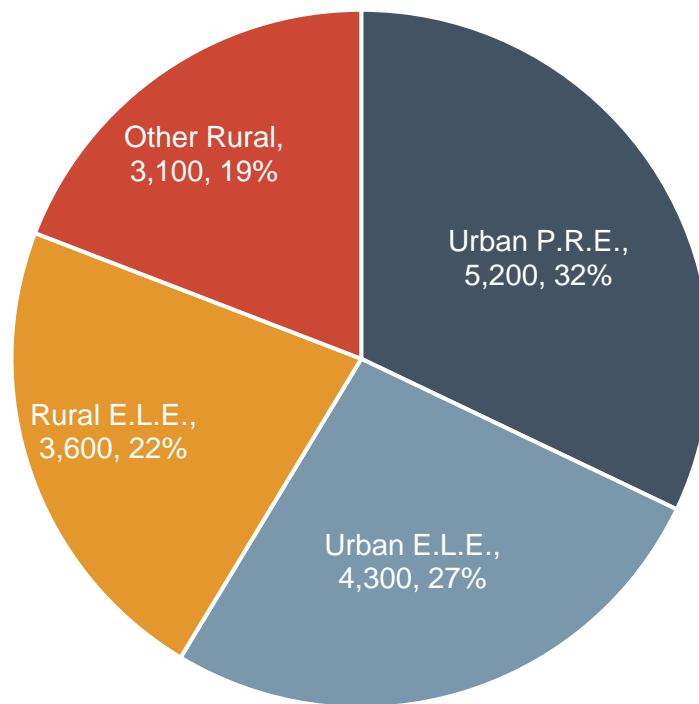
Other rural employment includes employment within the Rural System that is not E.L.E., such as employment in agriculture, resource development, work at home, recreation/ tourism and P.R.E.



6.1.1.5 Summary of Employment by Category, 2021

The County's employment base is estimated at 16,100 jobs as of 2021. Figure 6-1 provides a breakdown by the employment categories previously discussed. As summarized in Figure 6-1, urban P.R.E. accommodates the largest share of employment at 32%, followed by urban E.L.E. at 27%, rural E.L.E. at 22% and other rural at 19%.

Figure 6-1
County of Brant
Employment by Category, 2021



Source: Watson & Associates Economists Ltd., 2021.

6.1.2 Employment by Location Type

The forecast to 2051 includes a further breakdown of employment with respect to employment by geographic location.



6.1.2.1 Urban System

As previously mentioned, within the County's Urban System, employment is grouped into two broad categories: Urban Employment Areas and Urban Community Areas. The Urban System accommodates 59% of the County's employment base. The categories by geographic location are provided below.

Urban Employment Areas

Urban Employment Areas include predominantly E.L.E. in industrial-type buildings. Urban Employment Areas are clusters of industrial and export-based activities, identified in the County O.P. as lands designated as Employment in Paris and St. George. These areas are to be protected from sensitive uses, such as residential, specific institutional uses (e.g., schools, daycares and places of worship) and major retail uses.¹ While Urban Employment Areas are intended to serve industrial-type or export-based activities, Urban Employment Areas do permit some P.R.E. type uses, including employment in commercial and institutional-type buildings. The existing County of Brant O.P. permits the following P.R.E.-type uses: public self-storage; motor vehicle body shops; offices; medical/dental clinics; research facilities; and commercial uses that serve the industrial area, such as restaurants. Commercial uses that serve the industrial area, such as restaurants, daycare services and fitness centres are also permitted.²

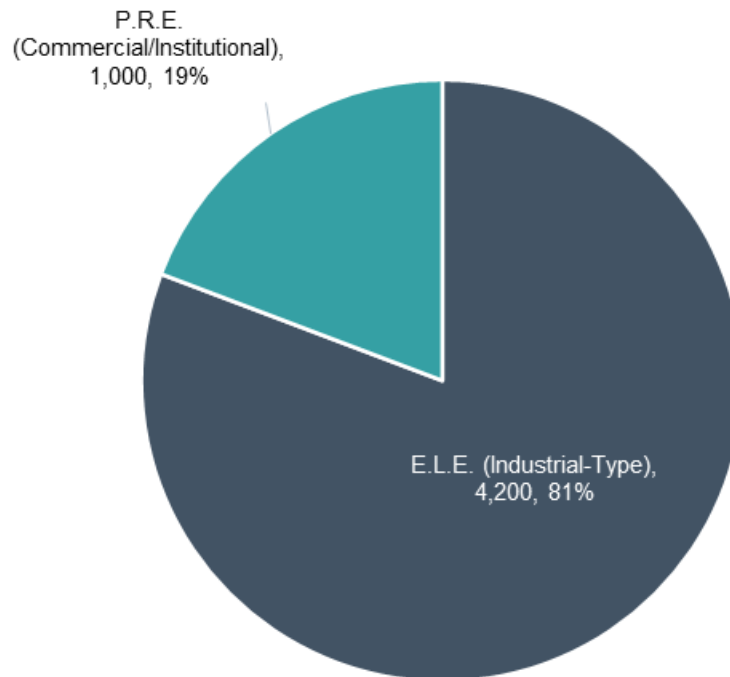
As summarized in Figure 6-2, it is estimated that Urban Employment Areas (located in Paris and St. George) accommodate 5,300 jobs and this employment base is comprised of 80% E.L.E. and 19% P.R.E. Urban Employment Areas in St. George are predominantly E.L.E. with approximately 60 P.R.E. jobs, while Paris Employment Areas have approximately 980 P.R.E. jobs. P.R.E. jobs in Paris Employment Areas include restaurants (e.g., Tim Horton's, Dominos and Mario's Pizza), a laundromat, a fitness centre, equipment rental/sales outlets, automotive repair centres and small office operations. Employment Areas in Paris also include place of worship uses which have a low employment yield. As previously discussed, provincial policy requires municipalities to plan Employment Areas that are protected from sensitive uses, such as place of worship facilities.

¹ Provincial Policy Statement, 2020, Definition of Sensitive Uses, p. 51.

² County of Brant Official Plan, 2012, policy 3.12.2, pp. 3-29 and 3-30.



Figure 6-2
County of Brant
Urban Employment Areas
Composition of Employment, 2021



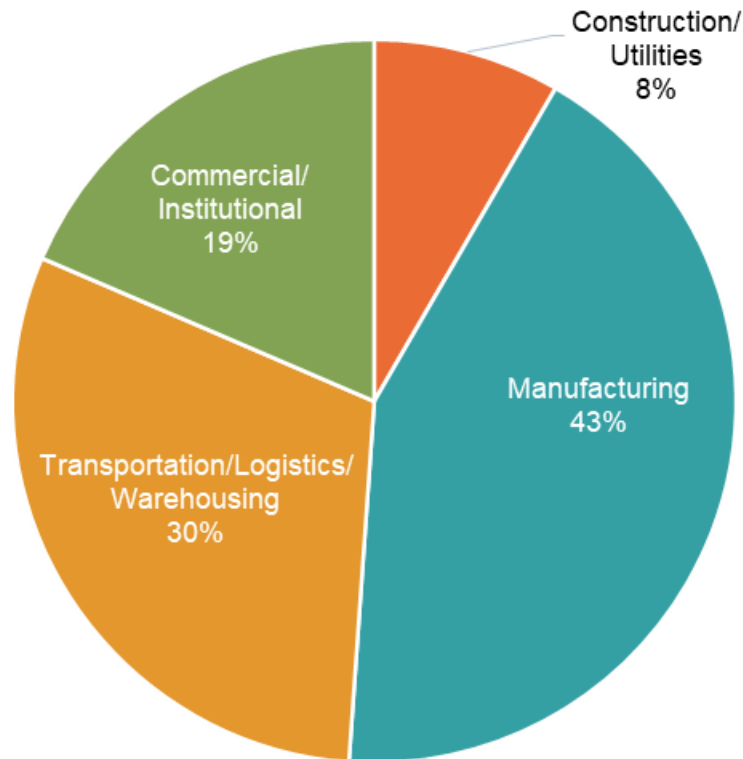
Source: Watson & Associates Economists Ltd.

With an estimated employment of 5,300, Urban Employment Areas comprise 33% of the County's employment base as of 2021.

Figure 6-3 provides further details on employment by sector within Urban Employment Areas. As summarized, manufacturing comprises 43% of the employment base in Urban Employment Areas, the largest sector. Transportation, logistics and warehousing represent the second largest share at 30%, followed by commercial/institutional employment at 19% and construction/utilities employment at 8%.



Figure 6-3
County of Brant
Urban Employment Areas
Employment by Sector, 2021



Source: Watson & Associates Economists Ltd., 2021.

Urban Community Area

The Urban Community Area includes all other lands not part of the Urban Employment Area within the Primary Settlement Areas (Growth Centres) of Paris and St. George. Non-residential uses in the Urban Community Area include those that serve the local trading area of the settlement area, as well as visitors to the area. Paris and St. George both have a downtown core, a key focal point of the community. The core area represents the largest cluster of commerce activity in the settlement area. In addition, Paris and, to a lesser extent, St. George have clusters of commercial development on lands designated General Commercial, Shopping Centre Commercial and Mixed Use. Generally, the largest retail uses are outside the downtown core areas. Institutional developments are accommodated on sites designated as Institutional in the County's O.P., as well as lands designated for residential use and commercial use.



Urban Community Areas represent 26% of the County's employment base as of 2021.

6.1.2.2 Rural System

Within the County's Rural System, employment is grouped into two broad categories, Rural Employment Areas and Other Rural. The Rural System accommodates 41% of the County's employment as of 2021. The categories by geographic location are provided below.

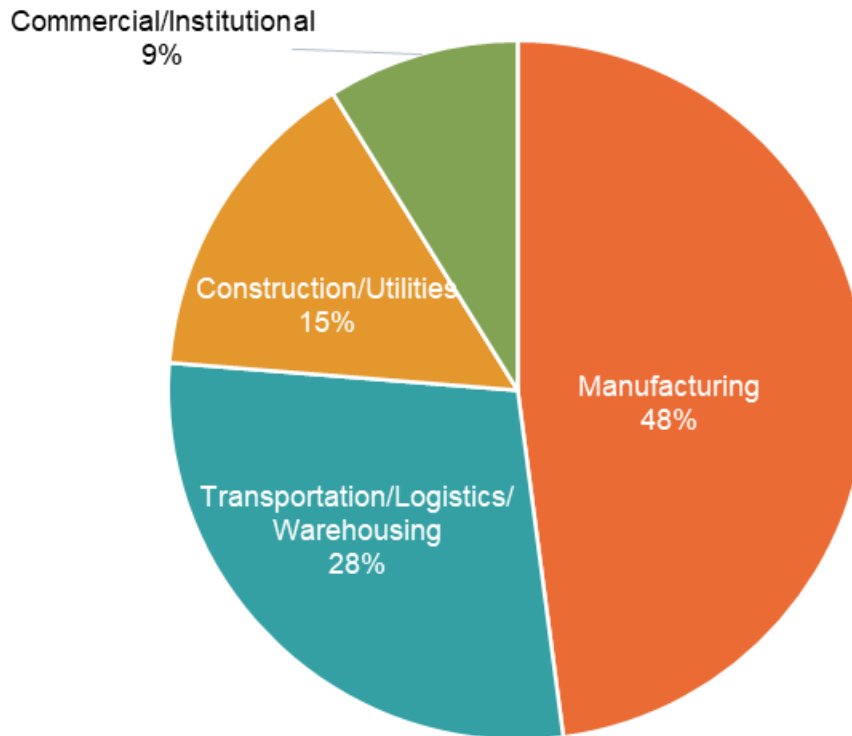
Rural Employment Area

Rural Employment Areas include predominantly E.L.E. in industrial-type buildings on lands with no municipal services. Rural Employment Areas are clusters of industrial and export-based activities. Similar to Urban Employment Areas, Rural Employment Areas accommodate some P.R.E. uses. Apart from fitness centres and daycare services, Rural Employment Areas accommodate the same P.R.E. uses as previously discussed for Urban Employment Areas. It is estimated that Rural Employment Areas accommodate 91% E.L.E. jobs and 9% P.R.E. jobs. As summarized in Figure 6-4, manufacturing employment represents nearly half (48%) the employment base in Rural Employment Areas, followed by transportation, logistics and warehousing at 28% and construction/utilities at 15%.

Overall Rural Employment Areas represent an important component of the County's employment base, representing 24% of the County's employment as of 2021.



Figure 6-4
County of Brant
Rural Employment Areas
Employment by Sector, 2021



Source: Watson & Associates Economists Ltd., 2021.

Other Rural Employment

Other Rural Employment includes all other lands outside Rural Employment Areas in the Rural System. Non-residential uses in this category include uses associated with primary sectors (e.g., agriculture, quarrying, etc.), commercial and institutional uses within Secondary Settlement Areas, Hamlets and a small base of industrial, commercial and institutional uses in the countryside. Other Rural Employment comprises approximately 17% of the County's employment base as of 2021.

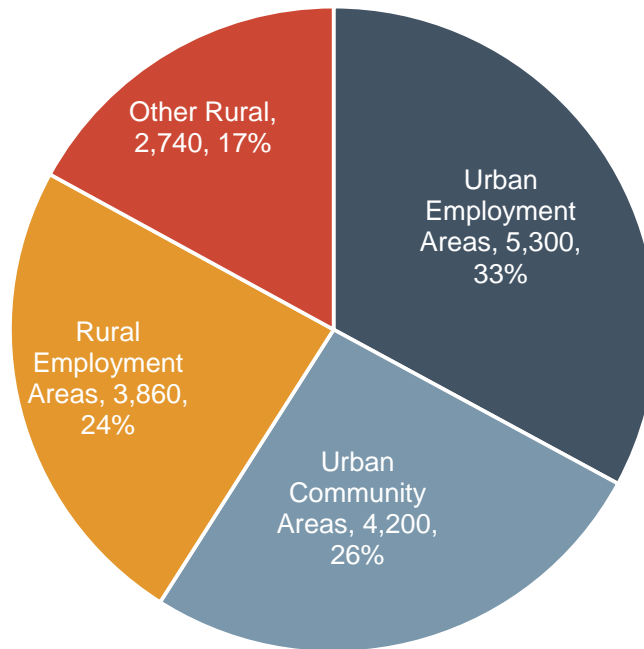
6.1.2.3 Summary of Employment by Location Type

As previously discussed, the County's employment base is estimated at 16,100 jobs as of 2021. Figure 6-5a provides a breakdown by the employment location types previously discussed. As summarized in Figure 6-5a, Urban Employment Areas



accommodate the largest share of employment at 33%, followed by Urban Community Areas at 26%, Rural Employment Areas at 24% and Other Rural at 17%.

Figure 6-5a
County of Brant
Employment by Location Type, 2021



Source: Watson & Associates Economists Ltd., 2020.



Figure 6-5b
County of Brant
Employment by Location Type and Location Type, 2021

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,300	0	0	5,300	33%
Urban Community Areas	4,200	0	0	0	4,200	26%
Rural Employment Areas	0	0	3,600	260	3,860	24%
Other Rural	0	0	0	2,740	2,740	17%
Total Employment	5,200	4,300	3,600	3,000	16,100	100%
Share (%)	32%	27%	22%	19%	100%	

Source: Watson & Associates Economists Ltd.

6.2 Macro-Trends, Disruptors and Employment Outlook

Following steady economic growth since the world economy rebounded from the 2008/2009 financial crisis, the world changed dramatically in 2020. The December 2019 outbreak of COVID-19 was officially declared a global pandemic by the World Health Organization (W.H.O.) on March 12, 2020, and has inflicted rising economic and human costs throughout the world. In response to the threat of further escalation associated with the spread of the virus, governments around the world have implemented quarantine and physical distancing practices in what has been referred to as the “Great Lockdown.”

To date, the downward impact of these containment measures on global economic output, commodity prices, and consumer spending has been severe. Economic sectors such as travel and tourism, accommodation and food, retail and personal services, manufacturing, energy, and finance have been hit particularly hard. On the other hand, many other employment sectors (particularly knowledge-based sectors), which are more adaptable to the current remote work environment have been less negatively impacted, and in some cases have prospered.

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 (refer to section 6.7.5 herein). Lastly, continued tensions and constraints related to international trade have also begun to raise further questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

At present, the level of sustained economic impact related to this “exogenous shock” to the world and Canadian economy is largely unknown. While the prospects for a global recovery have improved in recent months, the pace of this global economic recovery has been uneven, largely due to the rate at which countries have been able to vaccinate their residents.¹ Generally, it is clear that the longer COVID-19 persists on an international scale, the greater the severity of the current global downturn and prolonged disruption. In its latest World Economic Outlook, the International Monetary Fund (I.M.F.) baseline scenario estimates that the global economy contracted 3.5% in 2020 which represented a more significant economic contraction than what was experienced during the height of the 2008/2009 financial crisis.

For Canada’s largest trading partner, the U.S., real G.D.P. was estimated to contract by 3.4% in 2020 and is expected to rebound by 5.1% in 2021.² The recovery of the U.S. economy will largely depend on the U.S. administration’s response to dealing with the virus domestically, in conjunction with their approach to on-going international trade and protectionist policies.

6.2.1.1 Provincial Context

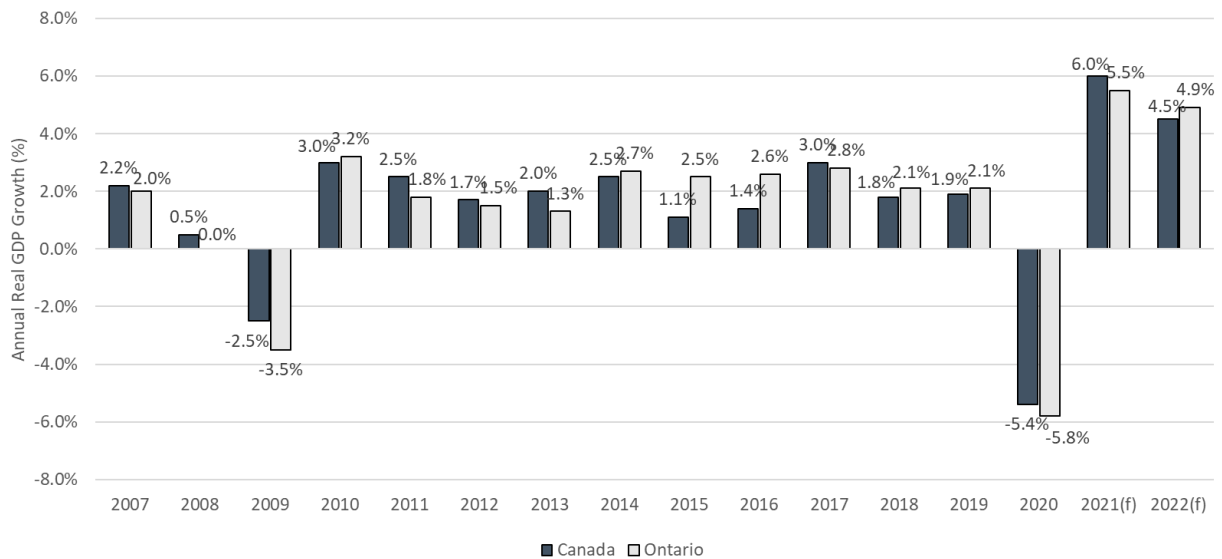
Over the past decade, the Canadian and Ontario economies have experienced relatively strong economic growth, as illustrated in Figure 6-6. While the recent performance of the national and Ontario economies has remained relatively strong over the past several years through to early 2020, the COVID-19 pandemic poses significant risks to the national and provincial economies which are important to recognize. As illustrated in Figure 6-6, the Ontario economy is estimated to have contracted by 5.8% in 2020, while G.D.P. growth is forecast to rebound by 5.5% in 2021. By 2022, BMO Capital Markets forecast the Ontario economy will continue its momentum, growing by 4.9%, while the overall Canadian economy is expected to grow by 4.5%.

¹ Global Government Forum. OECD Warns of Uneven Economic Recovery from COVID-19, Despite Global Growth. June 1, 2021.

² World Economic Outlook. International Monetary Fund. January 2021.



Figure 6-6
Ontario and Canada
Annual Real G.D.P. Growth
Historical (2007 to 2020) and Forecast (2021 to 2022)



Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, April 2021, by Watson & Associates Economists Ltd.
Note: 2020 (Ontario), 2021 and 2022 are forecast by BMO Capital Markets Economics.

Domestically, the Ontario housing market also continues to pose a risk to the overall provincial 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 G.T.H.A., has contributed to record consumer debt loads and eroded housing affordability.

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by G.D.P. output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector. Much of this shift has occurred during the past two decades, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. In contrast, service-based sectors such as financial and business services have experienced significant increases over the past several years.

While the manufacturing sector remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to

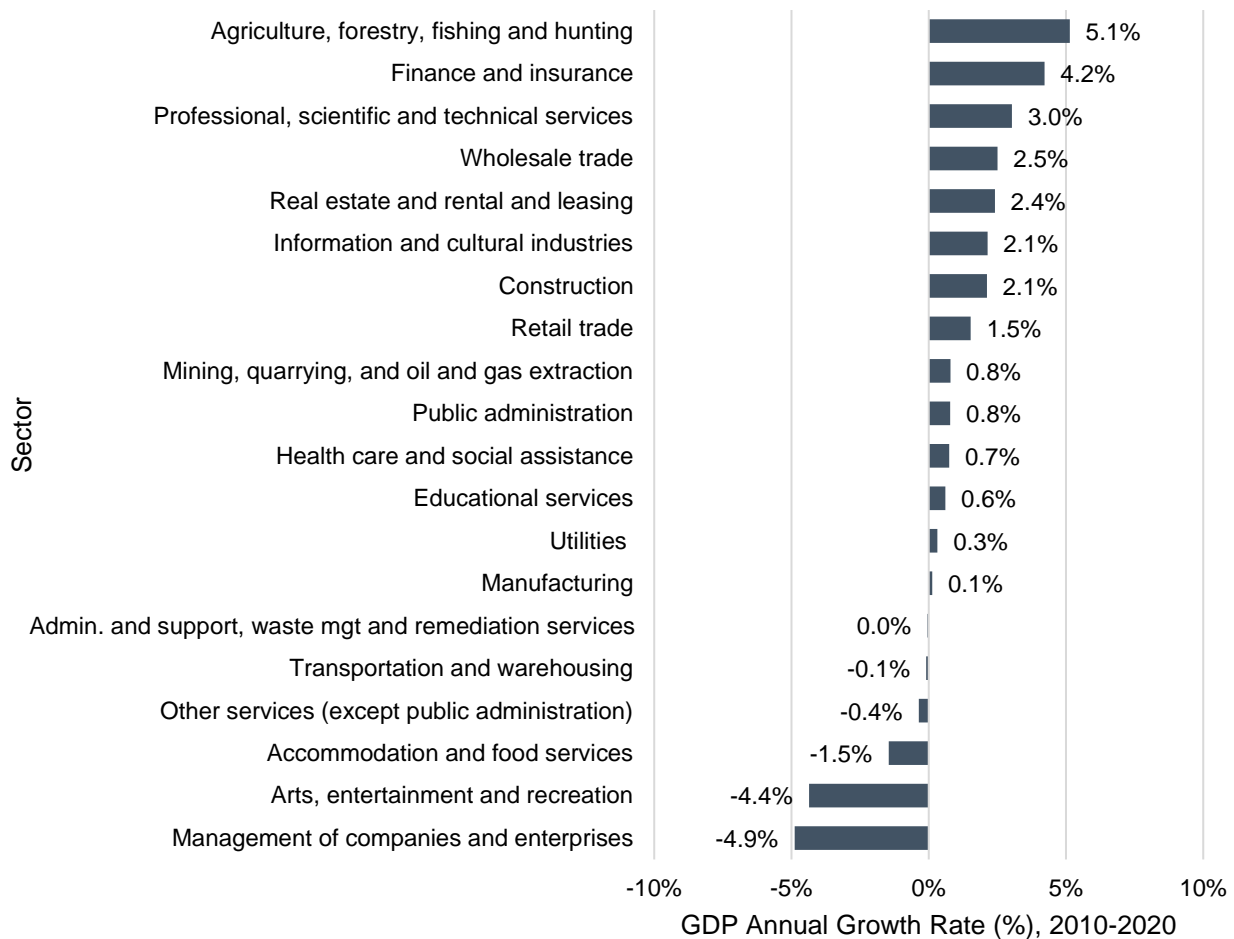


increased outsourcing of production processes to overseas manufacturers. Looking forward, there will continue to be a manufacturing focus in Ontario; however, industrial processes are anticipated to become increasingly more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

As summarized in Figure 6-7, a range of commercial, institutional, and industrial sectors have experienced increases in G.D.P. in Ontario over the past decade. G.D.P. growth has been particularly strong in agriculture, forestry, fishing and hunting, finance and insurance, wholesale trade, professional, scientific and technical services and real estate and rental and leasing. A number of knowledge-based sectors, including information and cultural industries and educational services, have experienced notable increases in G.D.P. Within the industrial sector, construction has also experienced significant increases in G.D.P. As previously discussed in Section 6.2, many sectors outside of knowledge-based sectors have been negatively impacted by COVID-19 which has resulted in lower levels of G.D.P growth or decline over the 10-year period. Some of these sectors include manufacturing, transportation and warehousing, accommodation and food services and arts, entertainment and food services which had strong growth to 2019.



Figure 6-7
Ontario
Change in Provincial G.D.P. by Sector, 2010 to 2020



Note: Based on chained 2012 dollars.

Source: Derived from Statistics Canada GDP by industry data, Table 36-10-0402-02, by Watson & Associates Economists Ltd.

As previously mentioned in Chapter 3, a key driver of the future economic potential for the County of Brant is its geographic location within Ontario. The County of Brant is located within the G.G.H., one of the fastest growing regions in North America. In many respects, the County of Brant's long-term population and employment growth potential is largely tied to the success of the G.G.H. as a whole.

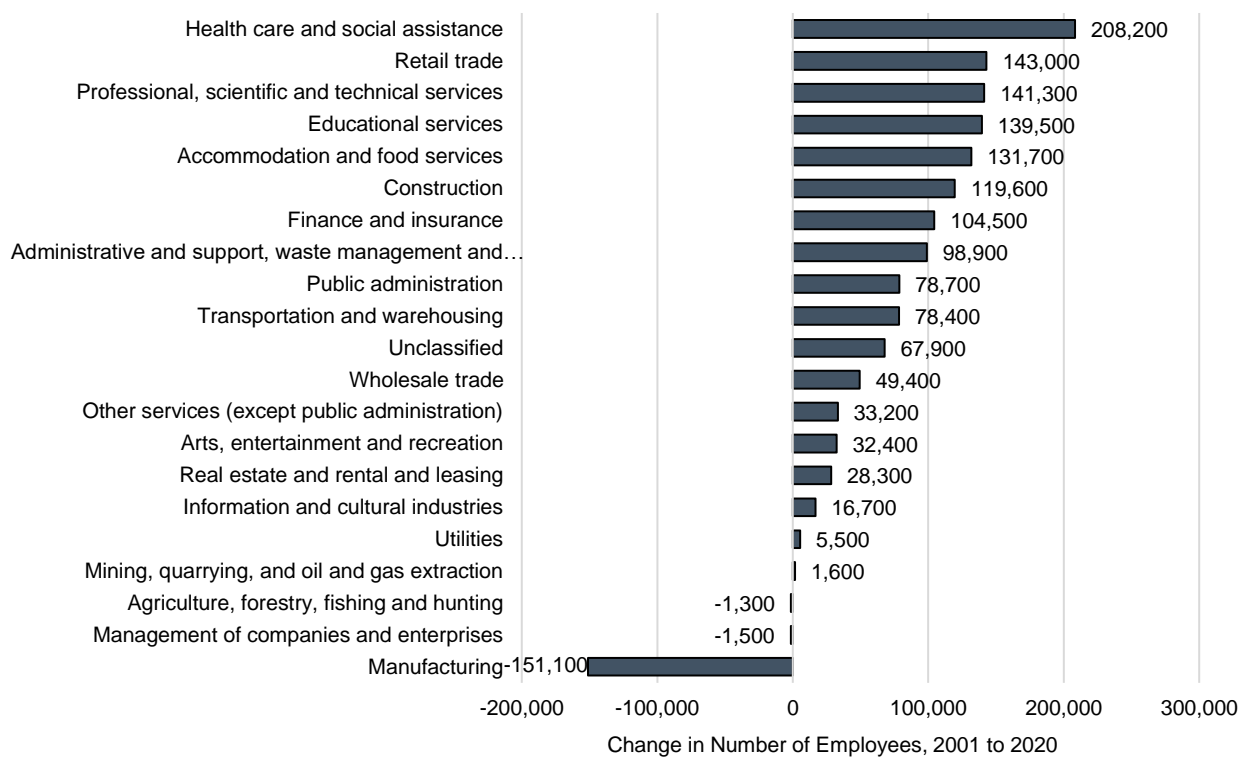
6.2.1.2 G.G.H. Trends

As summarized in Figure 6-8, total employment has grown by 37% within the G.G.H. from 2001 to 2020. While this region has experienced a large increase in service and



knowledge-based sectors, manufacturing and primary sectors have shown a decrease in the number of jobs within this period. It is noted, however, that the manufacturing sector has been experiencing a gradual recovery in recent years. With respect to employment, the sectors with the highest growth have been health care and social assistance, retail trade, professional, scientific and technical services, and education.

Figure 6-8
G.G.H.
Change in Employment, 2001 to 2020



Note: Includes employees only.

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

6.3 County of Brant Long-Term Employment Forecast to 2051

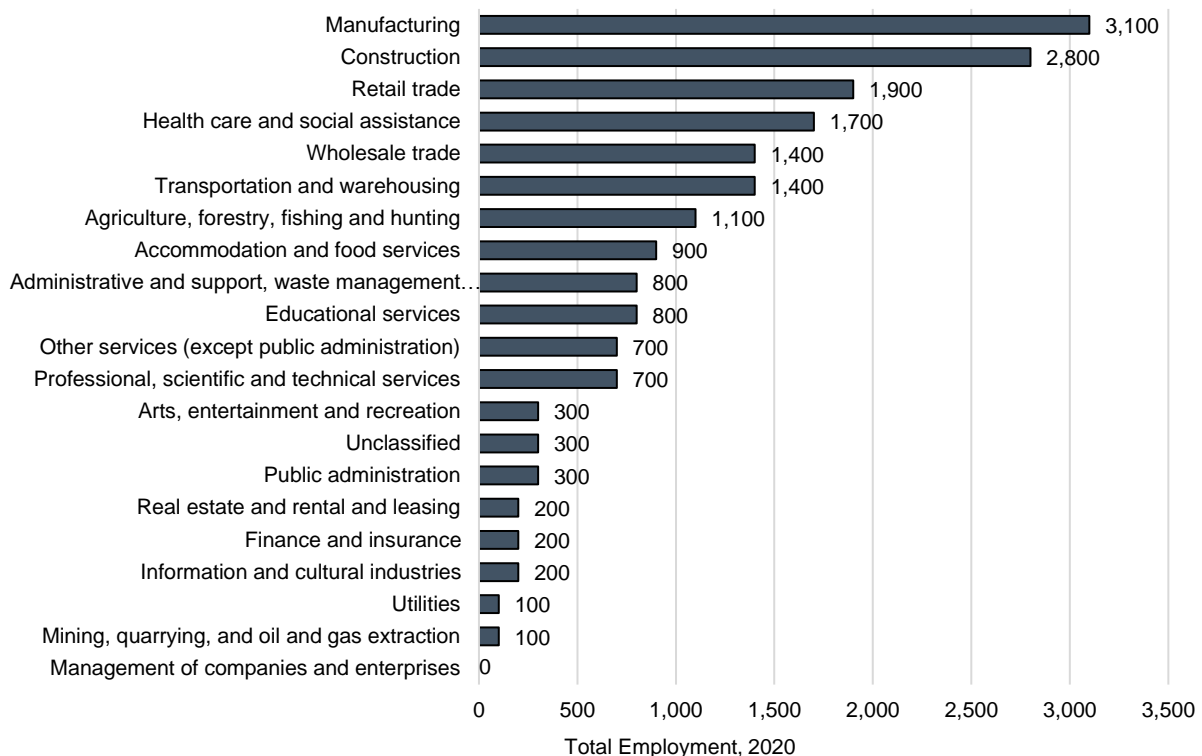
6.3.1 County of Brant Historical Employment Trends by Employment Sector

The County of Brant has a diverse employment base, as illustrated in Figure 6-9. The largest sector in the County is manufacturing which accommodates 3,100 jobs or 16%



of total employment. Other key sectors include construction; retail trade; health care, transportation and warehousing, and wholesale trade.

Figure 6-9
County of Brant
Employment by Sector, 2020



Note: Figure includes employed and self-employed jobs.
Source: Derived from EMSI data by Watson & Associates Economists Ltd.

Figure 6-10 summarizes the County's concentration of employment as a portion of its employment base relative to the Province. Sectors with a very high concentration of employment within the County relative to the Province are identified in purple, while sectors with a slightly higher concentration are identified in grey and sectors with a low concentration are identified in red. It is noted that all industrial sectors are more concentrated within the County relative to the Province.

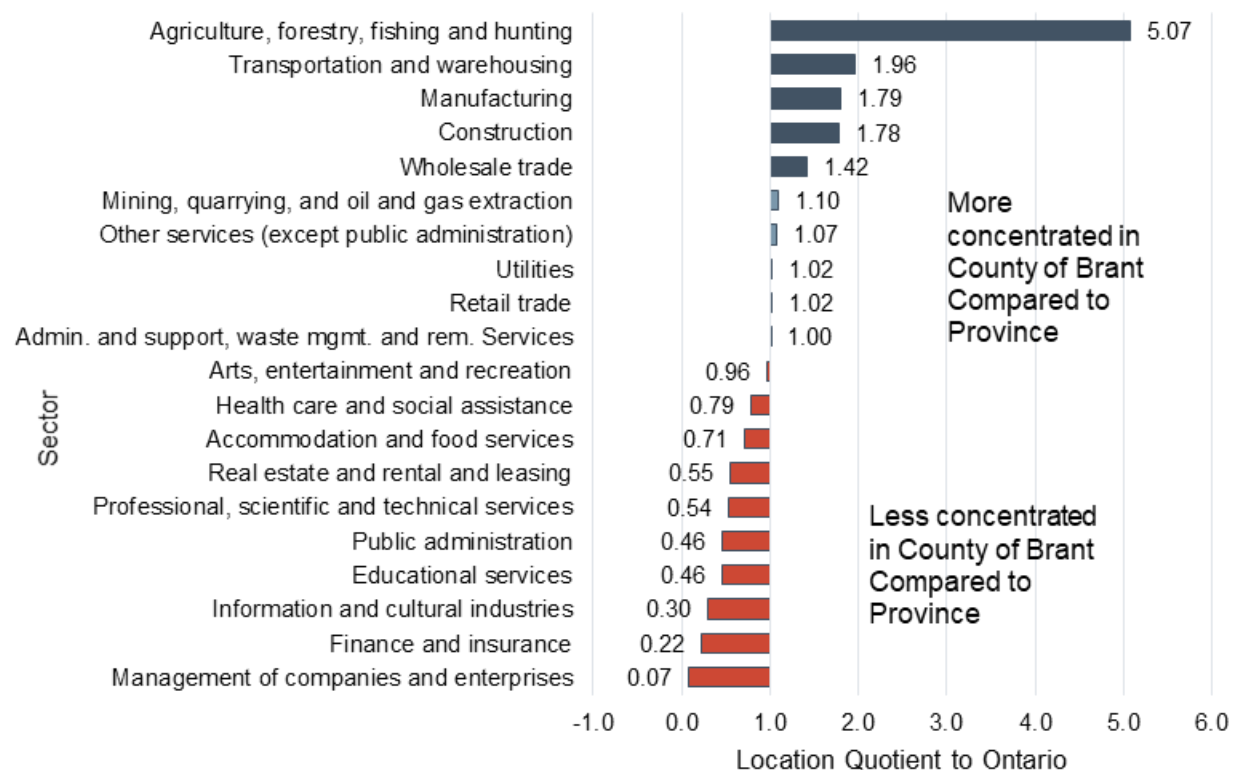
Agriculture, forestry, and fishing is estimated to be five times more concentrated within the County than in the Province, followed by transportation and warehousing, manufacturing, construction, and wholesale trade. Compared to the Province, within



the commercial and institutional sectors the County also has a slightly higher concentration in retail trade.

Employment sectors with a lower concentration of employment compared to the Province include a mix of commercial and institutional sectors, including public administration, office type sectors and commercial service sectors that serve the local and regional population.

Figure 6-11
County of Brant
Employment Base Relative to the Province of Ontario



Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2020.
Note: Figure includes employees.

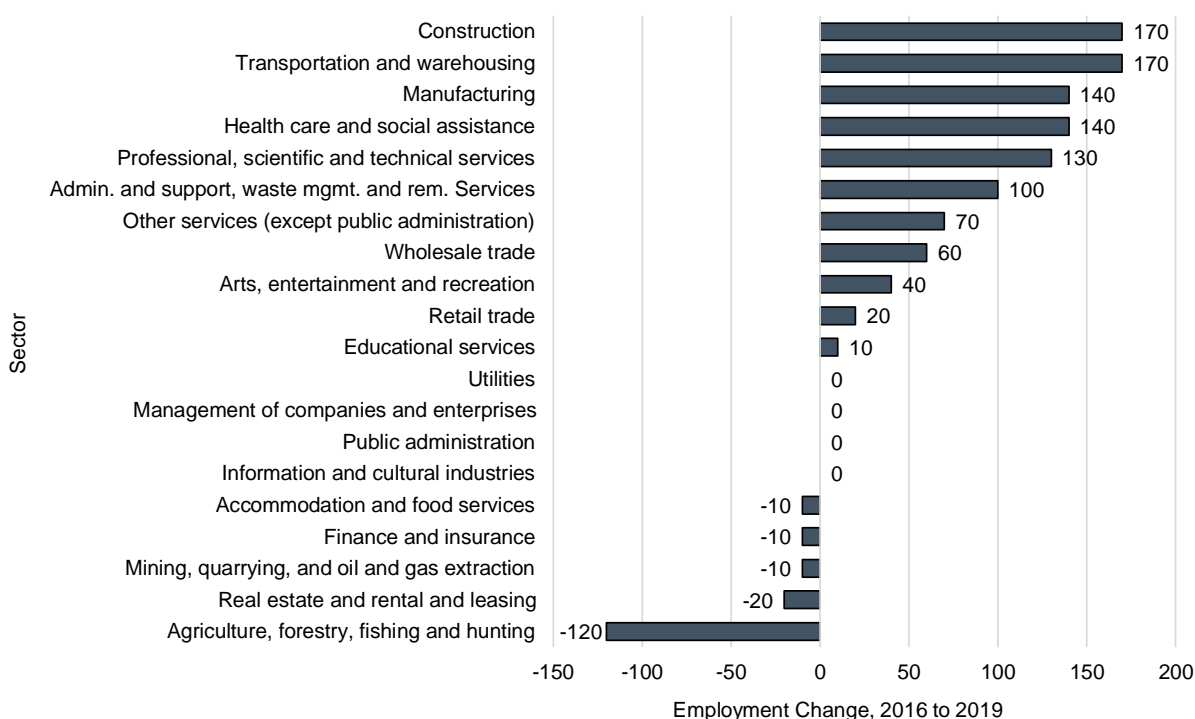
6.3.2 Change in Employment by Sector

In many respects, recent employment trends within County of Brant are similar to the broader trends experienced across the G.G.H. and the Province as a whole. As summarized in Figure 6-12, over the 2016 to 2019 period, the County of Brant added employment in several employment sectors, industrial sectors (construction, transportation and warehousing, manufacturing, and wholesale trade), and commercial



sectors (professional, scientific and technical services, arts and entertainment, and retail trade), and institutional sectors (health care and education).¹ The industrial sectors, as previously discussed, already had a strong presence in the County; however, the commercial and institutional sectors that did not have a strong presence have recently experienced substantial growth. Over the forecast horizon, it is anticipated that a number of these sectors will continue to grow based on the macro-trends and employment outlook previously discussed.

Figure 6-12
County of Brant
Change in Employment by Sector,
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.

6.3.3 County-Wide Employment Forecast to 2051

In accordance with Schedule 3 of the Growth Plan, 2019, the County of Brant employment base is forecast to reach 26,000 jobs by 2051. Based on the County's

¹ Based on OMAFRA EMSI Analyst data.



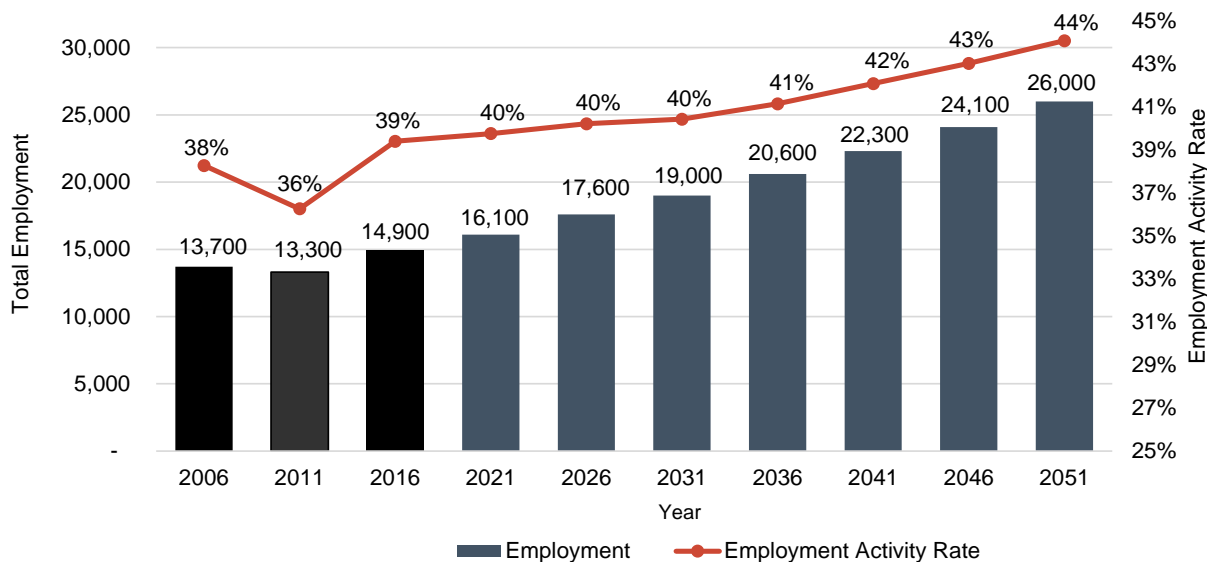
current employment base of 16,100 jobs as of 2021 and the Growth Plan, 2019 forecast of 26,000 jobs by 2051, the County of Brant is forecast to add approximately 9,900 jobs, an annual growth rate of 1.6%.

Figure 6-13 summarizes the long-term employment forecast for the County of Brant by total employment and employment activity rate in comparison to recent historical trends. The County's employment activity rate (ratio of jobs to population) has increased slightly since 2001. Over the long term, the County's employment activity rate is anticipated to increase from approximately 39% in 2016 to 44% by 2051. This moderate increase is anticipated to be largely driven by opportunities within the County's export-based employment sectors (e.g., transportation, wholesale trade, construction, small-scale to mid-sized manufacturing, and agri-business). There is also employment growth potential within P.R.E. sectors such as retail, accommodation and food, professional, scientific and technical scientific services, and health care. Growth within these P.R.E. sectors is anticipated to be driven by population growth within the County's Primary Settlement Areas (Growth Centres).

A large percentage of forecast job growth is anticipated to be accommodated through home occupations, home-based businesses and off-site employment, accounting for approximately 25% of employment growth over the 2016 to 2051 period. This employment generally does not directly generate significant additional demand for urban land.



Figure 6-13
County of Brant
Employment Forecast 2051



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.

6.3.4 County-wide Employment by Employment Category, 2016 to 2051

Figures 6-14 and 6-15 summarize the forecast by employment category (Urban P.R.E., Urban E.L.E., Rural E.L.E. and Other Rural). The following provides a summary with respect to the long-term employment outlook by employment category for the County from 2016 to 2051.

6.3.4.1 Urban P.R.E.

Urban P.R.E., as previously discussed, includes employment in institutional and commercial sectors within the Primary Settlement Areas (Growth Centres) including retail, personal services, accommodation and food, health and social services, education, and other services.

- Urban P.R.E. growth over the 2016 to 2051 period is expected to add 140 employees annually, representing 44% of overall employment growth in the County.



- E-commerce is anticipated to reduce the need for “bricks and mortar” retail over the long-term horizon. Despite this trend, it is important to recognize that the current commercial structure in the County’s Primary Settlement Areas (Growth Centres) is primarily oriented towards local-serving P.R.E. uses (uses that serve the immediate needs of residents), which are not as susceptible to e-commerce. P.R.E. uses related to work at home employment, tourism services, commercial services, local retail serving (e.g., grocery stores and pharmacy) and institutional uses (e.g., medical/health care) are anticipated to comprise the bulk of the P.R.E. growth over the next 30 years.
- Currently, there are approximately 4 residents for every 1 P.R.E. Community Area job in the County of Brant. Since 2006, this ratio has remained unchanged, which suggests that P.R.E. is growing at the same pace as population growth.
- Over the forecast horizon, it is anticipated that the total P.R.E. ratio will decrease slightly to 3 residents per 1 P.R.E. Community Area job, largely driven by strong growth related to work at home employment.
- Urban P.R.E. employment includes work at home employment which is anticipated to account for approximately 14% of P.R.E. growth.

6.3.4.2 *Urban E.L.E.*

As previously discussed, Urban E.L.E. represents jobs accommodated in industrial-type buildings on lands designated as Industrial in the Primary Settlement Areas (Growth Centres). This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities, as well as a limited amount of employment associated with commercial- and employment-supportive uses.

- As previously identified, the County has a diverse industrial base.¹ Over the past five years, the County has experienced employment growth in manufacturing, logistics/warehousing and construction sectors.
- Looking forward over the next 30 years, the County is anticipated to continue to accommodate steady urban E.L.E. growth comprised of a diverse range of industrial sectors. It is anticipated that urban E.L.E. will accommodate just under half (46%) the County’s employment growth, or 146 employees annually.

¹ Based on O.M.A.F.R.A. EMSI Analyst data.



6.3.4.3 *Rural E.L.E.*

Rural E.L.E., as previously discussed, consists of employment in industrial-type buildings within the Rural System. Rural E.L.E. includes dry industrial uses, uses that require no or partial municipal services (water and wastewater servicing).

- Rural E.L.E. represents a large portion (24%) of the County's employment base and includes some of the County's largest employers, including Stubbe's Precast (New Durham), Walter's Group (Highway 25/Highway 403), Beauti-Tone Paint factory (Burford), and Curtiss-Wright Valves Division-Farris (Cainsville).
- Recent rural E.L.E. growth has been largely associated with expansions of existing rural E.L.E. and modest growth on new sites.
- Over the forecast horizon, growth in rural E.L.E. is anticipated to include industrial employment in construction, select commercial uses (such as automotive/truck repair), logistics, and warehousing, sectors that typically do not require water services, fire protection, or urban amenities.
- It is anticipated that rural E.L.E. will accommodate approximately 3% of the County's employment growth, or 10 employees annually. Rural E.L.E. growth is anticipated to be accommodated through existing industrial operations, as well as new development opportunities in Cainsville and within the Highway 25/Highway 403 Employment Area.

6.3.4.4 *Other Rural Employment*

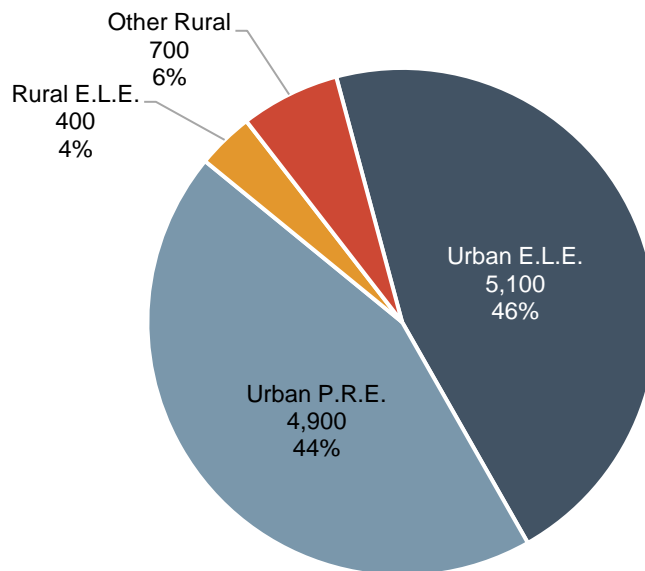
Other Rural Employment, as previously discussed, consists of employment within the Rural System that is not located in a Rural Employment Area.

- This category of employment represents 18% of the County's employment base.
- The primary sector, which includes agriculture and aggregates industries, has been a major driver of rural employment growth. Commercial and institutional uses in the Secondary Settlement Areas, Hamlets and the Remaining Rural Area are also a component of this category.
- Over the forecast horizon, it is anticipated that rural employment will continue to grow in rural-based sectors (primary sectors), as well as uses related to recreation and tourism.
- Value-added on-farm diversified uses are anticipated to be a key growing component of the County's rural work at home and off-site employment base.



- Technological innovation and improved broadband regional telecommunications will provide more opportunities for rural residents to work from home.
- It is anticipated that Other Rural Employment will accommodate approximately 6% of the County's employment growth, or 21 employees annually.

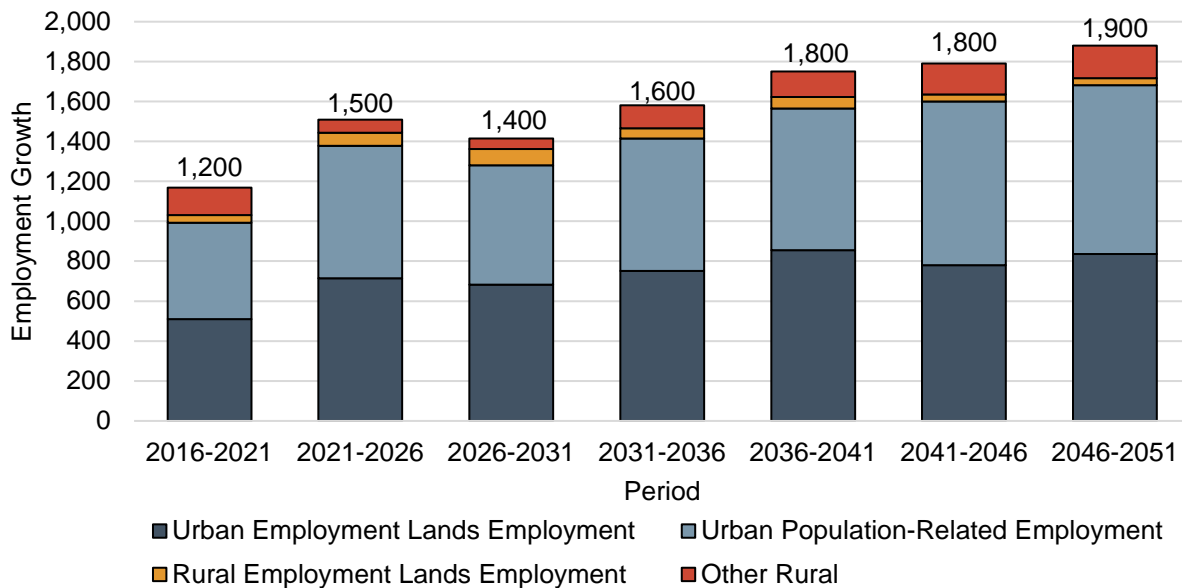
Figure 6-14
County of Brant
Employment Forecast by Employment Category,
2016 to 2051



Source: Watson & Associates Economists Ltd.



Figure 6-15
County of Brant
Employment Forecast by Employment Category, 2016 to 2051



Source: Watson & Associates Economists Ltd.

6.4 Employment Allocation by Settlement Area and Rural System to 2051

This chapter provides a summary of the forecast employment allocations by Primary Settlement Areas (Growth Centres) of Paris and St. George and the Rural System within the County of Brant. The employment allocations are further broken out by geographic policy area which includes Employment Areas, Urban Community Areas, Rural Employment Areas and Remaining Rural Area. Detailed tables on employment growth allocations are provided in Appendix C.

6.4.1 Employment by Primary Settlement Areas (Growth Centres) and Rural System

The employment growth forecast by Primary Settlement Areas (Growth Centres) and Rural System has been prepared based on a review of the following:



Local Supply Factors:

- A survey of vacant and occupied commercial space within the County's Primary Settlement Areas (Growth Centres);¹
- The availability and marketability (i.e., location, proximity to major highways, market character, etc.) of the County's supply of designated vacant serviced or serviceable employment lands; and
- Water and wastewater servicing capacity and potential solutions to overcome constraints (where identified).

Local Demand Factors:

- A review of historical and forecast employment growth rates within the County of Brant's commuter-shed;
- Discussions with County staff regarding recent non-residential development trends and future employment prospects in Paris, St. George and the Rural System;
- Impacts of local population growth by Primary Settlement Areas (Growth Centres) and Rural System on demands for P.R.E.;
- Review of recent Urban and Rural Employment Area absorption; and
- Recent non-residential building permit data by industrial, commercial, and institutional (I.C.I.) sector by Primary Settlement Areas (Growth Centres).

For each of the County's Primary Settlement Areas (Growth Centres), employment is forecast to grow at a rate higher than the past decade. This is partially driven by steady P.R.E. growth which is largely driven by strong local population growth and commercial opportunities. Accordingly, the largest share of P.R.E. has been allocated to Paris which has the largest share of population growth. In addition, Paris is anticipated to accommodate a strong rate of E.L.E. growth due to its opportunity to accommodate export-base industries with fully serviced sites and access to a 400-series highway.

6.4.2 Overview of Community Structure – Non-Residential Lands

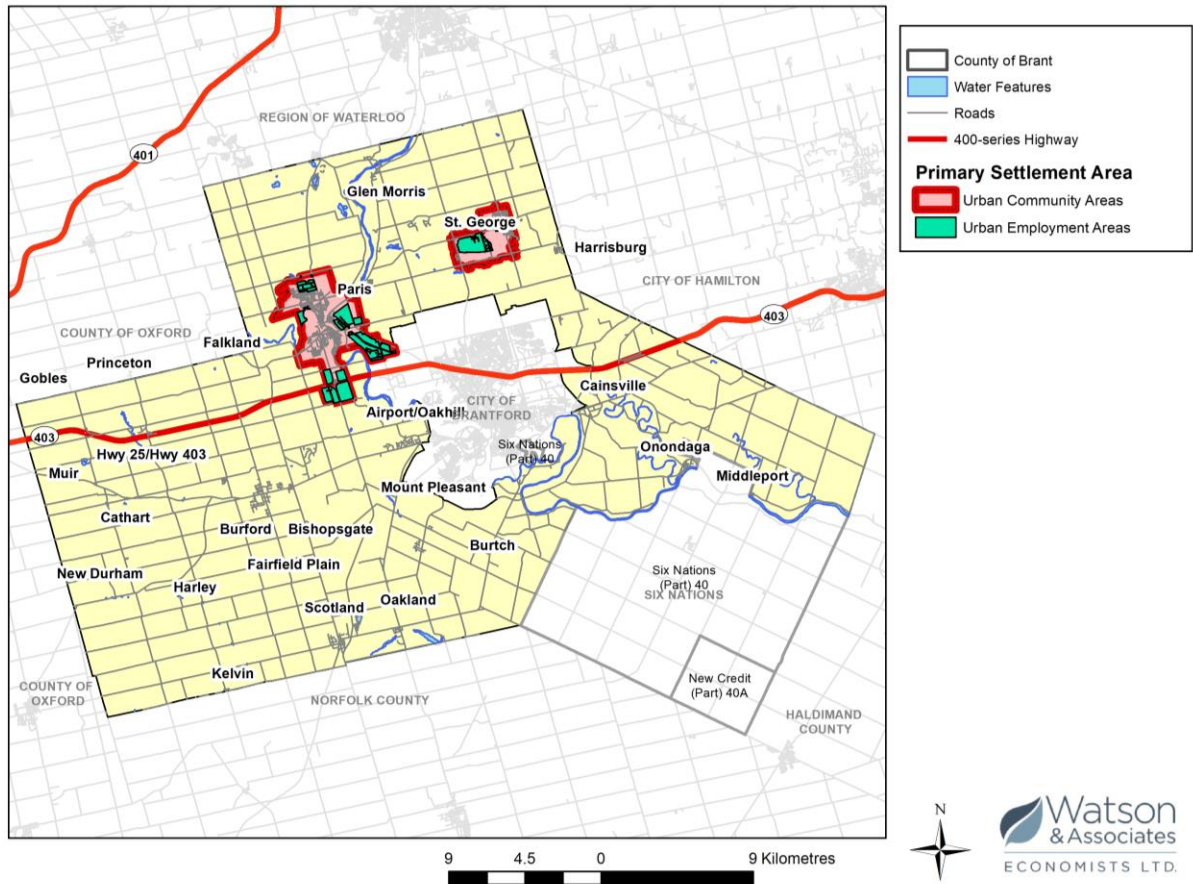
Figure 6-16 provides a map of the Primary Settlement Areas within the County of Brant. Non-residential lands within the Primary Settlement Areas of Paris and St. George are

¹ Details to be provided in the Phase 2 Report.



considered as urban non-residential lands and include two key components, Employment Areas and Community Areas.

Figure 6-16
County of Brant
Primary Settlement Areas
Urban Community Area and Urban Employment Area



Source: Watson & Associates Economists Ltd.

Figure 6-17 illustrates the County's non-residential land-use designations, using Paris and the surrounding rural area as an example. Lands designated for non-residential uses represent a core component of where employment growth is to be accommodated over the forecast horizon, including:

- Commercial
 - Core Area



- Mixed Use
- Shopping Centre Commercial
- General Commercial
- Institutional
- Employment
 - Urban Employment Area
 - Rural Employment Area.

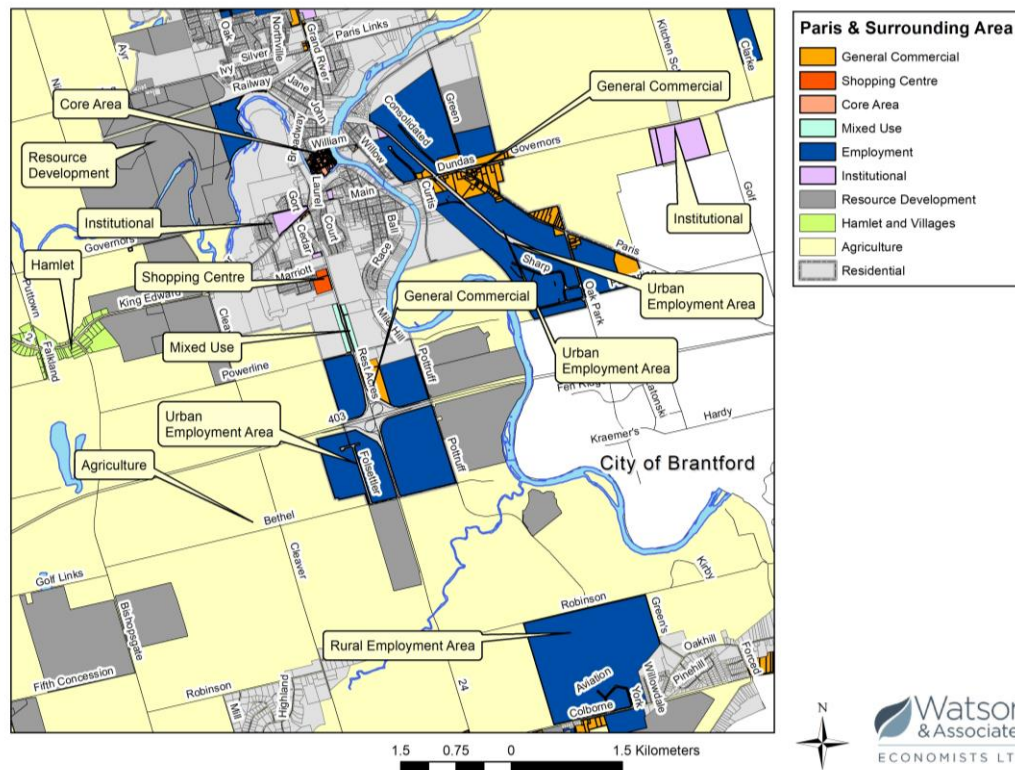
Work at home employment, rural employment outside Rural Employment Areas and non-residential development on residential lands (uses that are permitted) are anticipated to accommodate employment growth as well. Key designations in the Rural System include:

- Resource Development
- Hamlets & Villages
- Secondary Settlement Areas:
 - Core Area
 - General Commercial
 - Institutional
- Agriculture.

Further details on the role, function and purpose of these designations are provided later in this chapter.



Figure 6-17
County of Brant
Current County of Brant O.P. (2012)
Non-Residential O.P. Designations
Paris and Surrounding Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

6.5 Existing Employment Base by Settlement Area, 2021

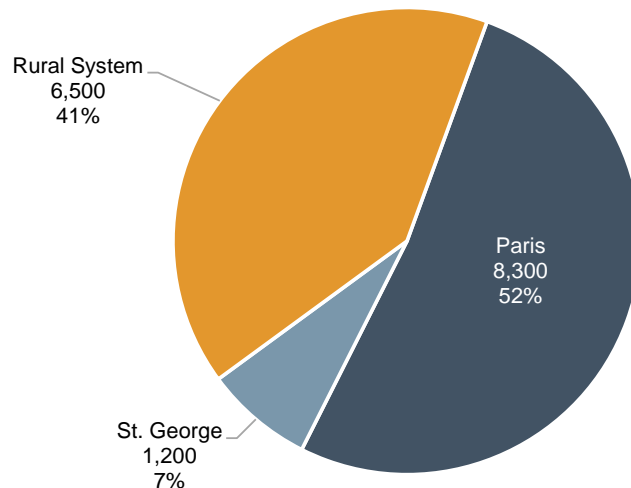
6.5.1 Existing Employment Base

As of 2021, the County of Brant's employment base was estimated at 14,900. As summarized in Figure 6-18, just over one-half (52%) of the County's employment base is accommodated within Paris. A large portion of the employment base is within the Rural System at 41%. The Rural System comprises a diverse range of employment including resource development, agriculture, Employment Areas, and a small component of P.R.E. St. George represents 7% of the County's employment base.



Further details on the employment base for each Area Municipality is provided in Appendix C.

Figure 6-18
County of Brant
Share of 2021 Employment Estimate by Primary Settlement Areas (Growth Centres)
and Rural System



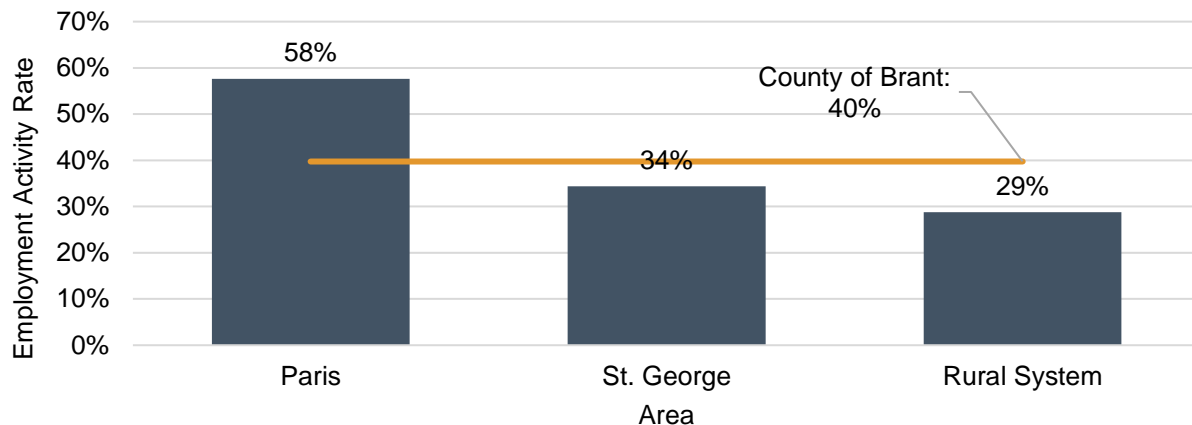
Note: Figures have been rounded.
Source: Watson & Associates Economists Ltd.

6.5.2 Employment Activity Rates by Area

Figure 6-19 summarizes the employment activity rate (ratio of jobs to population) by settlement area and the total Rural System compared to the County of Brant employment activity rate of 40% as of 2021. A high employment activity rate suggests a larger portion of employment relative to the population base of the settlement area. As summarized, Paris has a high employment activity rate at 58%. Paris has a large employment base and relies on in-commuting from the County and the surrounding G.G.H. municipalities. St. George has an employment activity at 34%, below the County-wide average of 40%. A key challenge for St. George over the forecast horizon is its ability to attract non-residential growth that will serve the residential growth anticipated and contribute towards building a complete community over the long term. The employment activity rate within the Rural System is at 29%, which is also below the County-wide average. A key challenge for the Rural System includes maintaining agriculture employment by supporting on-farm diversification, in light of trends related to increased automation and consolidation of agriculture operations.



Figure 6-19
County of Brant
Employment Activity Rate by Area, 2021



Note: Population used to calculate the employment activity rate includes the net Census undercount.
Source: Watson & Associates Economists Ltd.

6.5.3 Urban and Rural System Employment by Type, 2021

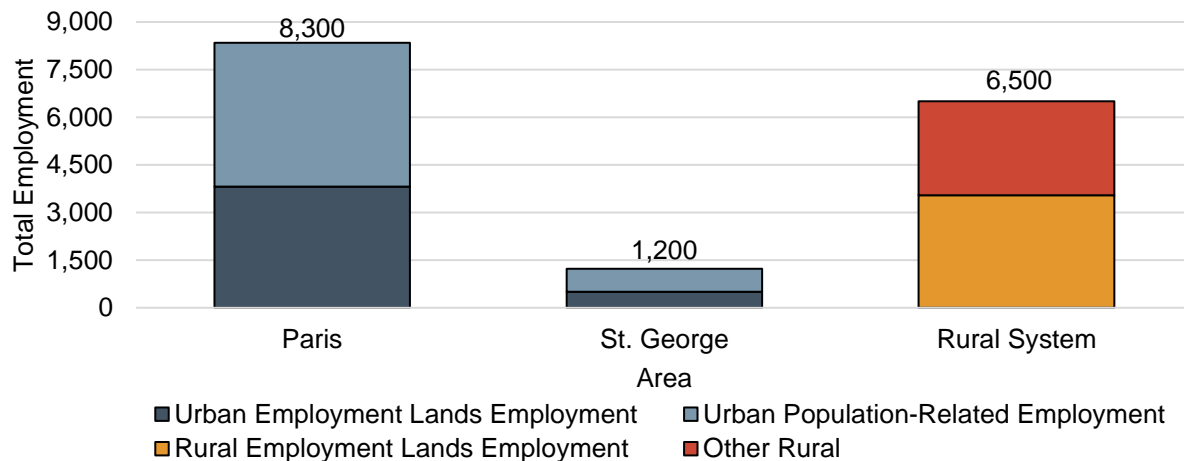
As previously discussed, the County of Brant has a diverse employment base, accommodating a range of sectors and uses in the Urban and the Rural Systems. Figure 6-20 illustrates the 2021 estimated employment for each Area Municipality by employment type (urban E.L.E., urban P.R.E. and rural E.L.E.).

Key highlights include:

- The employment base in Paris includes a split in employment between P.R.E. and E.L.E., with P.R.E. having a slightly larger share at 54% of the employment base;
- St. George with only 1,200 jobs has approximately 59% of P.R.E. A large portion of the P.R.E. is related to work at home employment. E.L.E. represents 41% of the employment base in St. George; and
- The Rural System has approximately 6,500 jobs and is slightly more oriented towards rural E.L.E. at 54%. The remaining 46% of the employment within the Rural System is comprised of a diverse range of employment, referred to as Other Rural in Figure 6-21 and includes employment in agriculture, resource development and to a lesser extent P.R.E.



Figure 6-20
County of Brant
2021 Estimate by Area and Employment Type



Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.

6.6 Employment Forecast by Area Municipality, 2016 to 2051

Figures 6-21 through to 6-25 summarize the employment forecast to 2051 by Area Municipality. Further details are provided in Appendix C. While employment growth rates vary for St. George and Paris, each share several relatively common attributes with respect to long-term employment trends, as follows:

- Paris and St. George are expected to experience steady to strong employment growth over the long-term forecast period;
- Annual employment growth is anticipated to increase from recent levels experienced over the last 10-year Census period for St. George and Paris;
- Future employment growth will comprise a diverse range of employment sectors, including E.L.E.; and
- P.R.E. will be driven by population growth.

As identified above, various factors were considered in allocating employment growth by Area Municipality. In addition to the above considerations, several assumptions have been made with respect to the employment growth potential for Paris, St. George,



and the Rural System, based on discussions with the County and feedback from County Council.

Key observations on the employment growth allocation have been organized by Area Municipality. As previously mentioned, further details on the employment growth allocation are provided in Appendix C, including details on employment by employment category, existing employment base, and employment forecast to 2051. Figures are provided based on the 2016 to 2051 period, as well as 2021 to 2051, to align with the land needs analysis, based on the existing inventory of vacant non-residential lands.

Paris

- The existing employment base in Paris, as of 2021, comprises 87% of the employment within the Urban System; the remaining 13% is in St. George. Overall, Paris represents 52% of the County's employment base (including the Rural System).
- As summarized in Figure 6-21b, Paris is anticipated to accommodate 73% of the County-wide employment growth over the 2021 to 2051 period. Growth is anticipated to accommodate 57% E.L.E. and 43% P.R.E. serving the local population base.
- As summarized in Figure 6-23, Paris is anticipated to grow at an annual employment rate of 2.1% over the next 30 years (2021 to 2051), which is slightly lower than the annual growth rate experienced over the most recent five-year period (2016 to 2021), which averaged 2.4% annually.
- Paris is anticipated to add 7,200 employees over the 2021 to 2051 period, representing approximately 240 employees annually. This is higher than the annual employment added over the most recent five-year period, 2016 to 2021, of 186 employees annually.

St. George

- St. George's existing employment base, as of 2021, comprises 13% of the employment within the Urban System and 7% of the employment County-wide.
- As summarized in Figure 6-21b, St. George is anticipated to accommodate 17% of the County's employment growth over the forecast horizon.
- Employment growth within St. George is anticipated to be significantly higher than historical trends, largely driven by population growth and the need for P.R.E.



to support the local population base. It is noted that wastewater servicing constraints in St. George may potentially limit the amount of employment allocated to this area over the long-term planning horizon, and could result in further refinements to the growth allocations by urban and rural area during the next M.C.R. review.

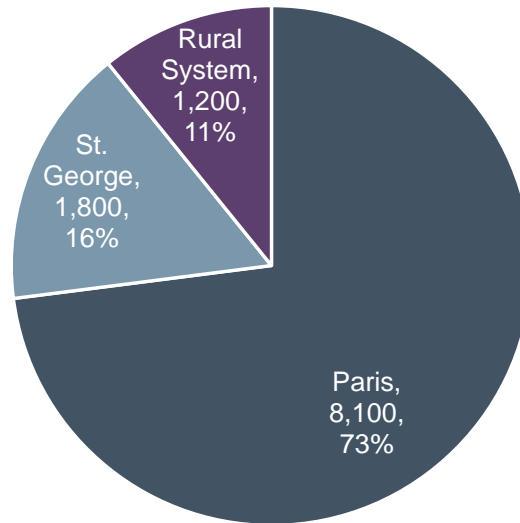
- As summarized in Figure 6-23, St. George is anticipated to achieve a relatively higher rate of employment growth (3.1% annually) compared to Paris and the County. As summarized in Figure 6-22b, St. George is anticipated to add 1,700 additional employees over the 2021 to 2051 period, approximately 60 employees annually.
- Employment growth is anticipated to include primarily urban P.R.E. at 67% and a small portion of urban E.L.E. at 28%.

Rural System

- The Rural System comprises 41% of the County's employment base. By 2051, the Rural System is anticipated to comprise 29% of the County's employment base. The shift towards a greater employment share within the Urban System is due to opportunities to accommodate E.L.E. in Paris, and the need for P.R.E. to support the local population in Paris and St. George.
- As summarized in Figure 6-21b, the Rural System is anticipated to add 1,000 employees over the 2021 to 2051 period, or 35 employees annually. Employment growth in the Rural System is anticipated to be comprised of 33% E.L.E., with the remaining 68% of employment across a range of sectors.
- On-farm diversification opportunities are expected to maintain employment levels in the agriculture sector and broaden employment opportunities in the Rural System. In addition, the Rural System is anticipated to support growth in work at home employment, given improvements in internet services expected over the planning horizon.

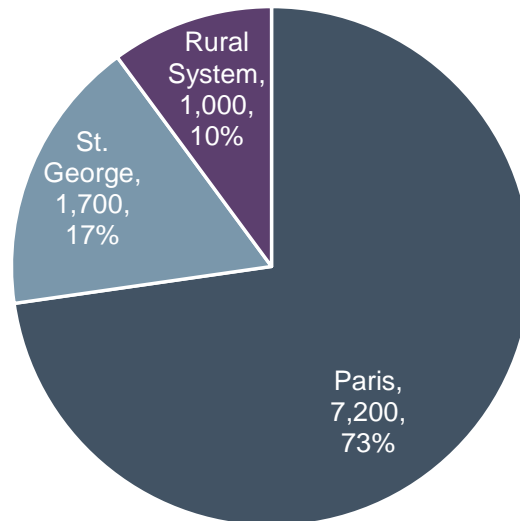


Figure 6-21a
County of Brant
Employment Growth Allocation by Area,
2016 to 2051



Source: Watson & Associates Economists Ltd.

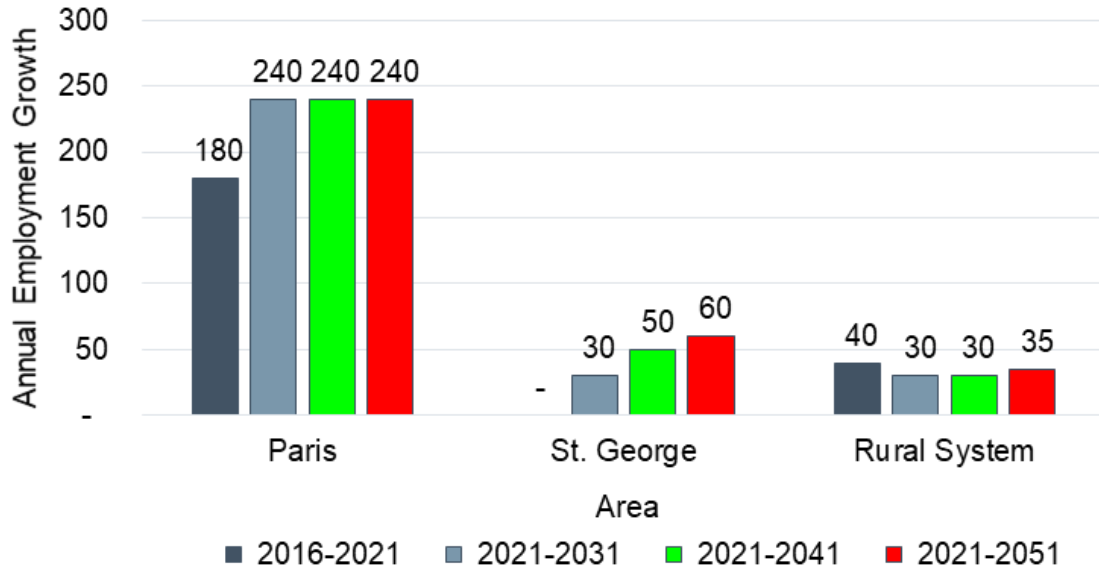
Figure 6-21b
County of Brant
Employment Growth Allocation by Area,
2021 to 2051



Source: Watson & Associates Economists Ltd.

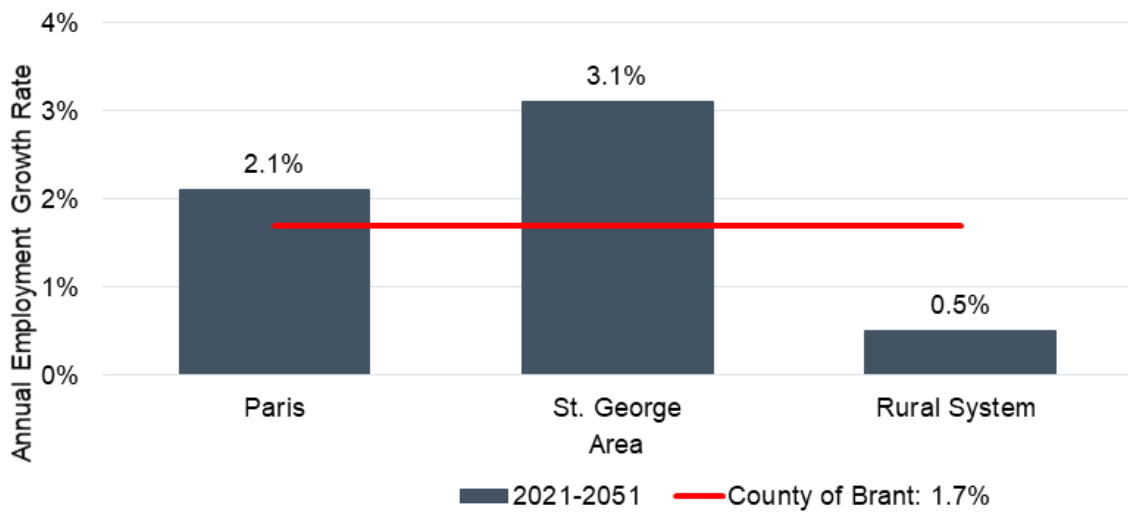


Figure 6-22
County of Brant
Annual Employment Growth by Area
2016 and 2051



Source: Watson & Associates Economists Ltd., 2021.

Figure 6-23
County of Brant
Forecast Annual Employment
Growth Rates, 2021 to 2051



Source: Watson & Associates Economists Ltd.



Figure 6-24a
County of Brant
Employment Category Growth by Area
2016 to 2051

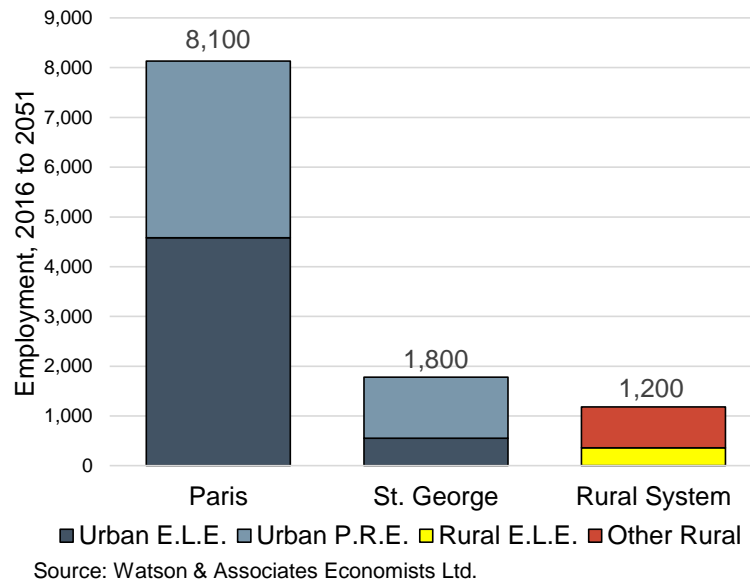


Figure 6-24b
County of Brant
Employment Category Growth by Area
2021 to 2051

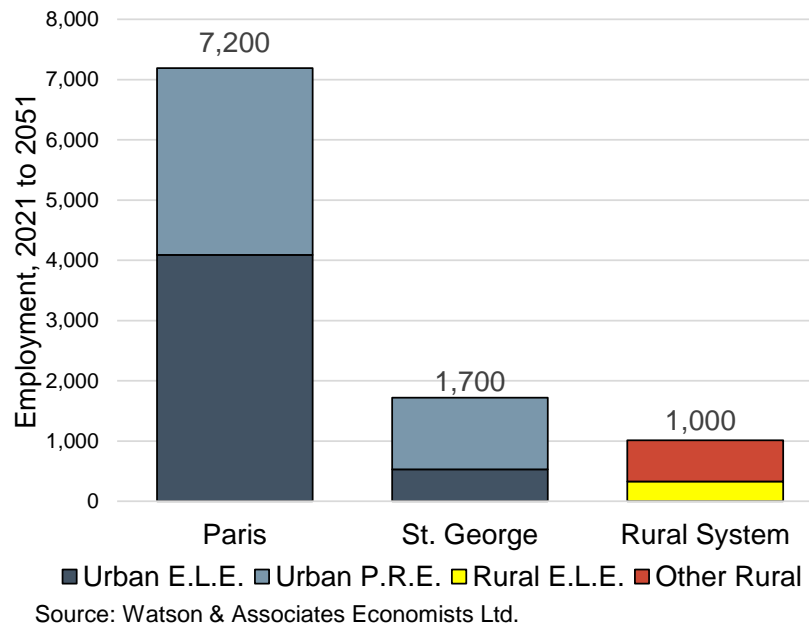
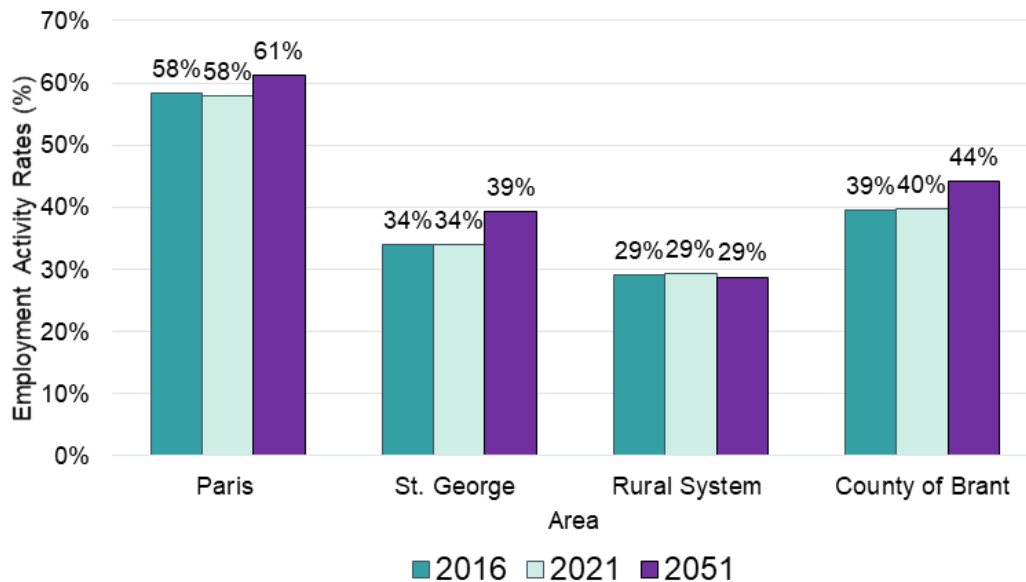




Figure 6-25
County of Brant
Employment Activity Rates,
2016, 2021 and 2051



Source: Watson & Associates Economists Ltd.

6.6.1 Employment Growth Allocation by Geographic Policy Area

As previously discussed, employment growth by category is further allocated by geographic area, which includes Employment Areas, Urban Community Areas, Rural Employment Areas and Remaining Rural Area. As previously discussed, while Employment Areas accommodate the County's E.L.E., Employment Areas also accommodate P.R.E. uses based on current O.P. permissions.

6.6.1.1 Urban System

Overall, the Urban System is anticipated to accommodate 90% of the County's employment growth over the 2021 to 2051 forecast horizon. Details of the growth allocation by the two policy areas (Urban Employment Area and Urban Community Area) are provided below.

Urban Employment Areas

Over the forecast period, it is anticipated that 100% of urban E.L.E. growth will be accommodated in the Urban Employment Area. As summarized in Figure 6-27, P.R.E.



uses are anticipated to comprise 18% of the employment growth accommodated in Urban Employment Areas (approximately 1,035 jobs), while E.L.E. is anticipated to represent 82% of the Urban Employment Area growth over the 2021 to 2051 period (approximately 4,690 jobs). P.R.E. uses accommodated in Urban Employment Areas are anticipated to comprise commercial uses that support the function of the Employment Area, as well as select commercial uses that are permitted in Employment Areas.

Paris is anticipated to accommodate 90% of the County's Urban Employment Area growth, while St. George is anticipated to accommodate the remaining 9% of the Urban Employment Area growth.

Figure 6-26
County of Brant
Urban System
Urban Employment Areas by Employment Type, 2021 to 2051

Employment Type in Employment Areas	Paris	St. George	Total Urban Employment Area	Share (%)
Urban P.R.E. Employment	975	60	1,035	18%
Urban E.L.E. Employment	4,150	540	4,690	82%
Total Urban Employment Area	5,200	600	5,725	100%
Share (%)	91%	9%	100%	

Source: Watson & Associates Economists Ltd.

Urban Employment Areas are anticipated to accommodate approximately 5,700 jobs over the 2021 to 2051 period, or 57% of the County's employment growth over the 2021 to 2051 horizon.

Urban Community Areas

Over the period, it is anticipated that Urban Community Areas will accommodate 76% of the County's forecast urban P.R.E. The remaining 24% of forecast urban P.R.E. is anticipated to be accommodated in Urban Employment Areas. Urban Community Areas are anticipated to accommodate 34% of the County's employment growth (3,300 jobs) over the 2021 to 2051 horizon.



As summarized in Figure 6-27, Paris is anticipated to accommodate 65% of the County’s Urban Community Area growth, while St. George is anticipated to accommodate the remaining 35%.

Since employment growth in the Community Area is largely driven by population growth, Figure 6-27 also provides a comparison of the ratio of population growth to Community Area employment for Paris and St. George. As summarized in Figure 6-27, it is anticipated that the County will add 1 Community Area job for every 4.6 new residents added to the Urban System. Compared to Paris, it is anticipated that St. George will add more Community Area employment relative to its population growth. St. George is forecast to add 1 Community Area job for every 3.5 residents, compared to Paris adding 1 Community Area job for every 5.2 residents. As discussed further in this chapter, St. George has a very small commercial base, and over the forecast horizon St. George will have significant demand for additional commercial space. While robust population growth is anticipated for Paris, the commercial base in Paris is more extensive than St. George and already has a strong commercial base to support future growth.

Figure 6-27
County of Brant
Urban System
Urban Community Area Employment Type, 2021 to 2051

Employment Type in Urban Community Areas	Paris	St. George	Total Urban Community Area	Share (%)
Urban P.R.E.	2,125	1,130	3,255	100%
Urban E.L.E.	0	0	0	0%
Total Urban Community Area (A)	2,125	1,130	3,255	100%
Share (%)	65%	35%	100%	
Population, 2021 to 2051 (B)	11,000	4,000	15,000	
Ratios of Residents to Community Area Job Number of Residents per 1 job (C = B / A)	5.2	3.5	4.6	

Source: Watson & Associates Economists Ltd.

Figure 6-28 provides a summary of the Community Area employment growth by policy area, D.G.A., and B.U.A. for Paris and St. George. It is anticipated over the forecast horizon that 80% of the Community Area will be accommodated in the D.G.A. It is important to recognize there are opportunities in the D.G.A. to accommodate additional



development and employment growth on existing commercial sites (intensification). A greater share of Community Area growth is anticipated in the B.U.A. in St. George compared to Paris, due to intensification and vacant site opportunities in St. George. Further, in St. George a large portion of the designated commercial lands along the Brant Road corridor are classified as within the B.U.A.; however, they are not fully developed.

Figure 6-28
County of Brant
Urban Community Areas
Urban Community Areas by Policy Area (D.G.A. and B.U.A.), 2021 to 2051

Employment Type in Urban Community Areas	Paris	St. George	Total Urban Community Area	Share (%)
Designated Greenfield Areas (D.G.A.)	1,800	800	2,600	80%
Built-up Areas (B.U.A.)	325	330	655	20%
Total Urban Community Area (A)	2,125	1,130	3,255	100%
Share (%)	65%	35%	100%	

Source: Watson & Associates Economists Ltd.

6.6.1.2 Rural System

As summarized in Figure 6-29, rural E.L.E. represents a third of the employment growth anticipated in the Rural System, while the remaining 67% represents a diverse range of employment including work at home employment and employment in agriculture, resource development, and to a lesser extent commercial employment.



Figure 6-29
County of Brant
Rural Employment by Employment Type, 2021 to 2051

Rural Employment Type	Total Rural System	Share of Rural (%)
Rural E.L.E.	330	33%
Other Rural	680	67%
Total Rural	1,010	100%

Source: Watson & Associates Economists Ltd.

Rural Employment Areas

As summarized in Figure 6-30, over the forecast it is anticipated that the majority of rural E.L.E. will be accommodated in Rural Employment Areas (90%). A small portion (10%) of rural E.L.E. is anticipated to be accommodated on small rural sites outside Employment Areas. It is anticipated that Rural Employment Areas will accommodate a small portion of non-E.L.E. uses, primarily commercial uses (approximately 100 employees).

Rural Employment Areas are anticipated to accommodate 400 jobs over the 2021 to 2051 horizon, accommodating 40% of the Rural System employment growth and 4% of the County's employment growth.

Figure 6-30
County of Brant
Rural Employment Areas, 2021 to 2051

Rural Employment Type	Share of Rural Employment in Rural Employment	Rural Employment Area	Rural Employment Area
Rural E.L.E. in Rural Employment Areas	90%	300	75%
Other E.L.E. in Rural Employment Areas	15%	100	25%
Total Rural Employment Area	40%	400	100%

Source: Watson & Associates Economists Ltd.

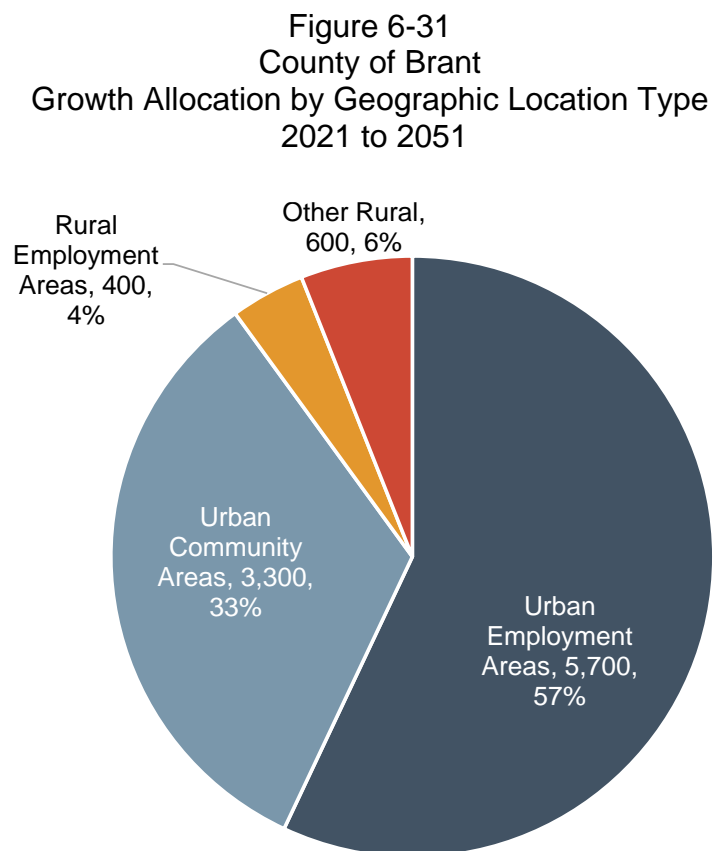


Other Rural Employment

The remaining rural employment (approximately 600 jobs) is forecast to represent 6% of the County's employment growth over the forecast horizon.

6.6.1.3 Summary of Employment by Area Type, 2021 to 2051

Figure 6-31 provides a summary of the County's employment growth allocation by area type as discussed above.



Note: Figures has been rounded.

Source: Watson & Associates Economists Ltd.

Further details on the opportunity to accommodate commercial development and Employment Area development, including land needs, are provided in the following section. In addition, a discussion of employment growth opportunities in the Rural Area is provided.



6.7 Commercial Overview

Commercial lands accommodate a large proportion of the population-related employment base, primarily within the Urban Community Area. A small portion of commercial growth is anticipated to be accommodated in Employment Areas, as well as within the Rural System. Provided herein is a summary of the commercial sector and the opportunity to accommodate commercial employment in the County.

6.7.1 County of Brant Official Plan Commercial Policies

Commercial areas in the County O.P. have been designated Core Area (as defined in section 3.8 of the O.P.), General Commercial (as defined in section 3.9 of the O.P.) and Shopping Centre Commercial (as identified in section 3.10 of the O.P.). In accordance with section 2.5.2 of the O.P., priority should be given to locate commercial and retail uses in proximity to Highway 403, including interchanges, and on land that is fully serviced or on land where services can be reasonably extended.

6.7.1.1 Core Areas

As identified in section 3.8.1 of the O.P., lands designated Core Area are primarily the downtown areas within the Primary Settlement Areas (Growth Centres) and Secondary Settlement Areas of Paris, Burford, and St. George. These areas function as primary activity centres and gathering places within the County and are the location for a wide range of uses, including retail, service commercial, cultural, tourism, recreational, entertainment, business and professional, government, institutional, social and community, employment, and residential uses.

6.7.1.2 General Commercial

As per section 3.9.2 of the O.P., the predominant use of land in the General Commercial designation is retail commercial, entertainment, professional offices, financial institutions, assembly halls, eating establishments, automotive uses, hotels and motels, community facilities, and residential uses above the first floor.

The General Commercial designation is intended to provide for commercial establishments offering goods and services which primarily serve the County's market area.



6.7.1.3 Shopping Centre Commercial

Shopping Centre Commercial, as opposed to General Commercial is intended to serve residents of the County beyond the limits of the County.

The Shopping Centre Commercial designation includes primarily retail stores, as well as personal and service commercial uses, restaurants, financial institutions, and commercial recreational establishments. Furthermore, large format retail uses shall be permitted in the Shopping Centre Commercial designation within the Urban Settlement Areas through site-specific amendment to the County O.P. and Zoning By-law.

6.7.2 Characteristics of the County of Brant's Commercial Space

The County's commercial base is primarily concentrated in Paris, and to a lesser extent St. George. Other settlement areas across the County accommodate a small commercial base, less than 50,000 sq.ft. (4,700 sq.m). After Paris and St. George, Burford has the largest commercial base at approximately 47,000 sq.ft. (4,400 sq.m).

As summarized in Figure 6-32, the County of Brant has approximately 683,000 sq.ft. (64,000 sq.m) of commercial space within the Primary Settlement Areas (Growth Centres) of Paris and St. George. Provided below is a summary of the commercial base in Paris and St. George.

Paris

Paris has a vibrant downtown which includes a large concentration of service businesses and specialty stores that cater to the population base of the County and visitors to the area. Paris has two large supermarkets (Sobeys and No Frills) anchoring the Paris commercial base in the north and south.

Canadian Tire and Home Hardware are the largest retailers providing comparison-based retail goods that compete within the regional market area, notably with the City of Brantford. There are two accommodation facilities, a budget motel in the southeast end and a historic hotel in the downtown core. Office uses are in small-scale office buildings (less than 20,000 sq.ft./1,900 sq.ft.), as well as



No Frills Grocery Store, Paris. A large commercial use of approximately 30,000 sq.ft. (2,800 sq.m).



in units in retail buildings. Paris is the primary service centre for health and medical care services in the County, with the Willett Urgent Care Centre as an important anchor to the community.

Paris has approximately 586,000 sq.ft. (54,400 sq.m) of commercial building space. Relative to the population base, Paris has approximately 41 sq.ft. (3.8 sq.m) of commercial building space per resident (commercial building space per capita), which is considered low, but within an average range for a community within proximity to a larger urban centre (i.e., City of Brantford).

Approximately 29,000 sq.ft. (2,700 sq.m) of the commercial building space in Paris is vacant. The commercial building space vacancy rate is 5%, which is considered low. Most of the vacant space is concentrated in one large unit of 20,000 sq.ft. (1,900 sq.m) within a plaza in the Grand River St. N. commercial corridor. A healthy commercial vacancy rate is generally within 5% to 10% which supports the ability of the market to accommodate relocations of retailers. At the time of this study there was approximately 70,000 sq.ft. (6,500 sq.m) of commercial space under construction within the Rest Acres Road commercial corridor, and additional multi-unit commercial leasing opportunities for a new unbuilt retail plaza at 185 & 197 Pinehurst Road, which is not included in the building space inventory.

St. George

St. George accommodates a small commercial base of approximately 90,000 sq.ft. (8,400 sq.m). The commercial base includes two distinct functions. The western extent of the St. George settlement area along Brant Road (Highway 24) primarily serves passing motorists. This area is primarily undeveloped with only a few commercial businesses. The downtown core primarily serves the convenience and immediate needs of residents (convenience stores, small grocery store and bank), as well as providing a small base of service businesses and restaurants for the local population and surrounding rural area. The downtown core of St. George includes a traditional Main Street; however, retail uses are primarily on the one side of the street. Infill opportunities and conversion of



Food Town Grocery Store, St. George. The largest commercial use of approximately 12,000 sq.ft. (1,110 sq.m).

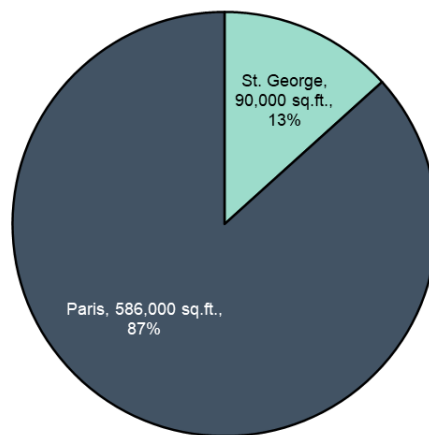


residential buildings on designated lands in the core provide an opportunity to strengthen the commercial base of the core and provide additional commercial uses on the west side of the Main Street.

St. George has approximately 26 sq.ft. (2.4 sq.m) of commercial building space per resident (commercial building space per capita) which is considered very low and reflects a community where the majority of commercial shopping is done outside the community.

St. George offers a limited amount of available vacant commercial building space. Approximately 2,700 sq.ft. (250 sq.m) of the commercial building space in St. George is vacant. The commercial building space vacancy rate is 3%, which is considered below a healthy range in a balanced market.

Figure 6-321
County of Brant
Paris and St. George Commercial Building Space, G.L.A. (sq.ft.),
January 2021



Source: Based on site visits by Watson & Associates Economists Ltd.

6.7.3 Commercial Nodes and Corridors in Paris and St. George

Paris has four distinct commercial nodes/corridors, as illustrated in Figure 6-33a. The four commercial nodes and corridors include:

- Paris Downtown Core;
- Grand River St. N.;
- Rest Acres Rd.; and



- Dundas St. E. and Paris Rd.

Provided below is a summary of the nodes and corridors. Further information on the building space and land supply is provided in Appendix F.

Paris Downtown Core

The Paris downtown core has approximately 198,000 sq.ft. (18,400 sq.m) of commercial space on approximately 4 ha of designated lands. The designated downtown Core Area includes a large residential component of at-grade residential uses (single detached, semi-detached and townhouses), which comprise 38% of the downtown Core Area. The commercial base is largely oriented towards Grand River St., a historical Main Street, and the adjacent side streets. The repurposed industrial building, the Paris Wincey Mills, is a multi-storey, mixed-use building accommodating a range of office and retail uses. The downtown core offers the opportunity for infill and conversion of residential uses to non-residential uses; however, given the location is within a floodplain, there are restrictions on development within the downtown core. It is estimated that there is less than 1 ha of vacant designated commercial land in this node. Further, the downtown core only has two vacant storefronts of approximately 3,300 sq.ft. (310 sq.m) of building space as of January 2021.

Grand River St. N.

The Grand River St. N. commercial corridor caters to auto-oriented travel in the north end of Paris, a gateway to Paris from the north. This corridor includes the largest retail plazas in Paris, as well as two large retailers, Canadian Tire and Sobeys. It is estimated that this corridor accommodates approximately 161,000 sq.ft. (15,000 sq.m) of commercial space over 7 ha of developed commercial land. It is estimated that there is approximately 3 ha of vacant designated commercial land in this corridor. This corridor has approximately 20,000 sq.ft. (1,900 sq.m) of commercial building space (consisting of a former liquidation store) as of January 2021. This area also offers potential intensification opportunities, as the average building coverage is below the industry standard of 25% (ratio of building space to land area).

Rest Acres Road

Rest Acres Road is the newest commercial corridor in Paris, serving as a gateway to Paris from the 403 Highway in the south. This area offers the largest opportunity to



attract regional trade given sites are near the 403 Highway. As of January 2021, there was approximately 41,000 sq.ft. (3,800 sq.m) of built commercial space on approximately 1.5 ha of developed designated commercial lands. At the time of compiling the commercial inventory, a new commercial development (1070 Rest Acres Rd.) of approximately 70,000 sq.ft. (6,500 sq.m) was under construction (not included in the inventory). The Rest Acres Rd. corridor provides approximately 23 ha of vacant designated commercial land. This corridor also includes three different commercial designations: Shopping Centre Commercial, General Commercial, and Mixed Use.

Dundas Street E. and Paris Road

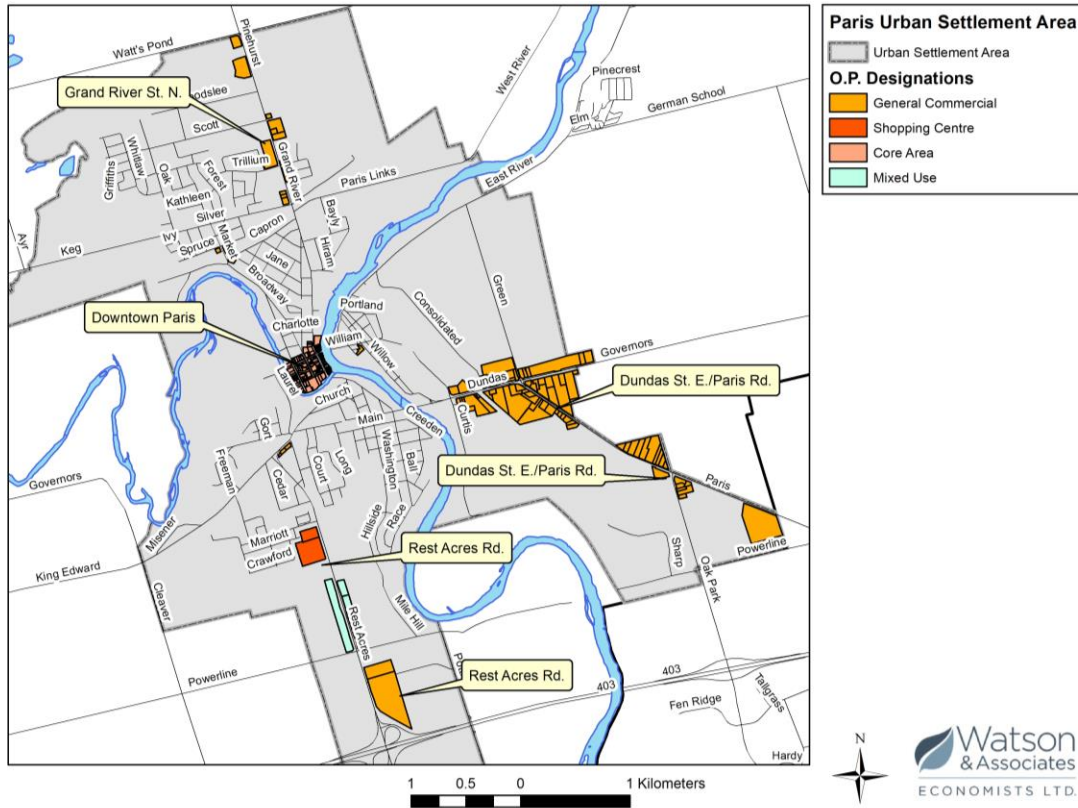
The Dundas Street E. and Paris Road commercial corridor is adjacent to an Employment Area. This auto-oriented corridor is an important gateway to Paris from the southeast and serves in supporting the employment uses in the Employment Area. The total commercial building space is estimated at 140,000 sq.ft./13,000 sq.m accommodated on approximately 15 ha of developed designated land. The largest commercial uses in this area include a No Frills grocery store, a building supply store (Brantford Granite & Quartz) and a motel. Developed commercial lands within this corridor have very low building coverage ratios, a building ratio of less than 10%. As such, this area offers significant intensification opportunities. In addition, a large portion of the designated base is occupied by rural residential uses (approximately 25 ha), which over the planning horizon could accommodate commercial development. There is approximately 20 ha of vacant commercial land.

Other Commercial Sites in Paris

There are 46,000 sq.ft. (4,300 sq.m) of additional commercial built space in Paris outside the corridors identified above (accommodated on parcels of approximately 3 ha). This commercial space is located on lands designated as residential, Employment Area and small commercial designated sites. The largest supply of commercial building space outside the corridors and nodes of designated commercial space includes commercial space within the Paris Flats neighbourhood (approximately 15,000 sq.ft./1,400 sq.m), as well as along Dumfries Street (approximately 11,000 sq.ft./1,000 sq.m), areas that are designated as urban residential.



Figure 6-33a
County of Brant
Paris Commercial Nodes & Corridors



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

St. George has three distinct commercial nodes/corridors, as illustrated in Figure 6-33b. The three commercial nodes and corridors include:

- St. George Downtown Core;
- Brant Road; and
- Site Specific Policy Area 25.

Provided below is a summary of the nodes and corridors. Further information on the building space is provided in Appendix F and land supply is provided in Appendix G.

St. George Downtown Core

The St. George downtown core has approximately 76,000 sq.ft. (7,100 sq.m) of commercial space on approximately 4 ha of designated commercial land. The



commercial building space in the core is primarily concentrated on one side of the Main Street, a traditional Main Street. The downtown core of St. George has a developed commercial land area similar in size to the developed commercial land area in the Paris downtown core, however with significantly less commercial space in St. George. The St. George downtown core provides opportunities for intensification, as there are sites with low utilization of commercial building space, opportunities for infill development, as well as opportunities for residential building conversions to non-residential uses. It is estimated that there is approximately 1.5 ha of vacant land within the St. George downtown core.

Site Specific Policy Area 25

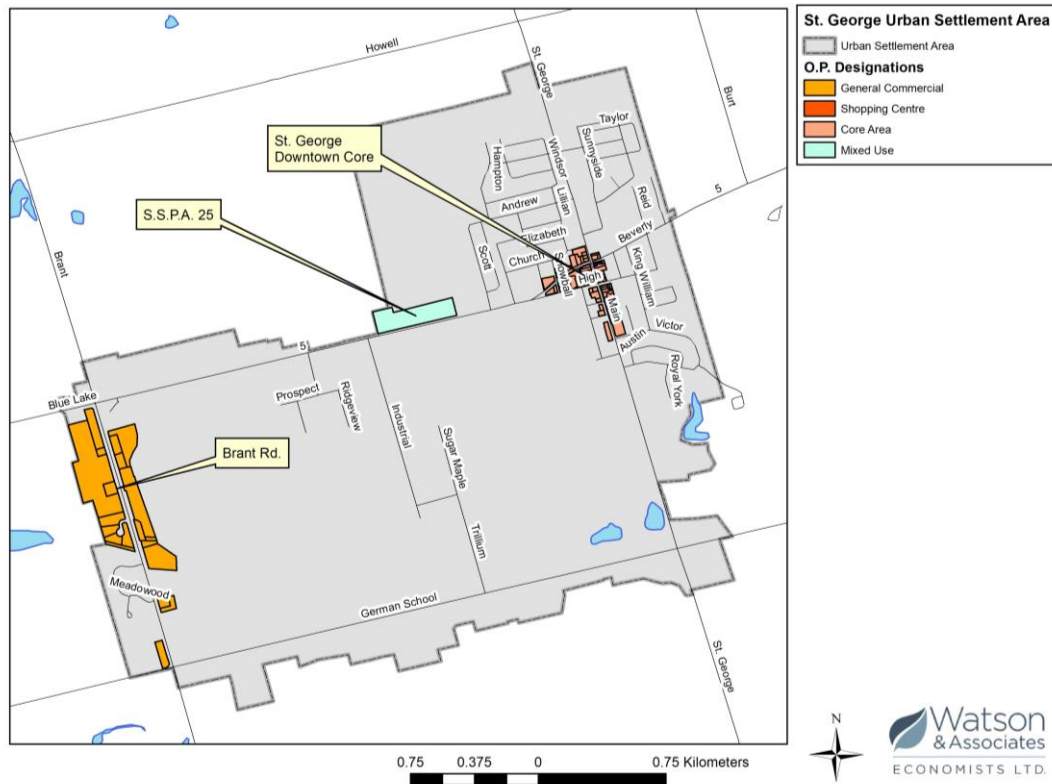
Site Specific Policy Area 25 is an undeveloped designated mixed-use site of approximately 5 ha and according to the County of Brant O.P. excludes residential uses. These lands are part of a larger area planned for new residential communities to the south.

Brant Road

Brant Road is a commercial corridor along the western extent of the St. George settlement area. This area offers a large supply of vacant designated lands oriented towards passing motorists. It is estimated that there is approximately 2 ha of developed and 17 ha of vacant land. Further opportunities include the potential development on lands with rural residences of approximately 5 ha. The commercial corridor currently includes a Tim Hortons, a gas station and an automotive repair operation.



Figure 6-33b
County of Brant
St. George Commercial Nodes & Corridors



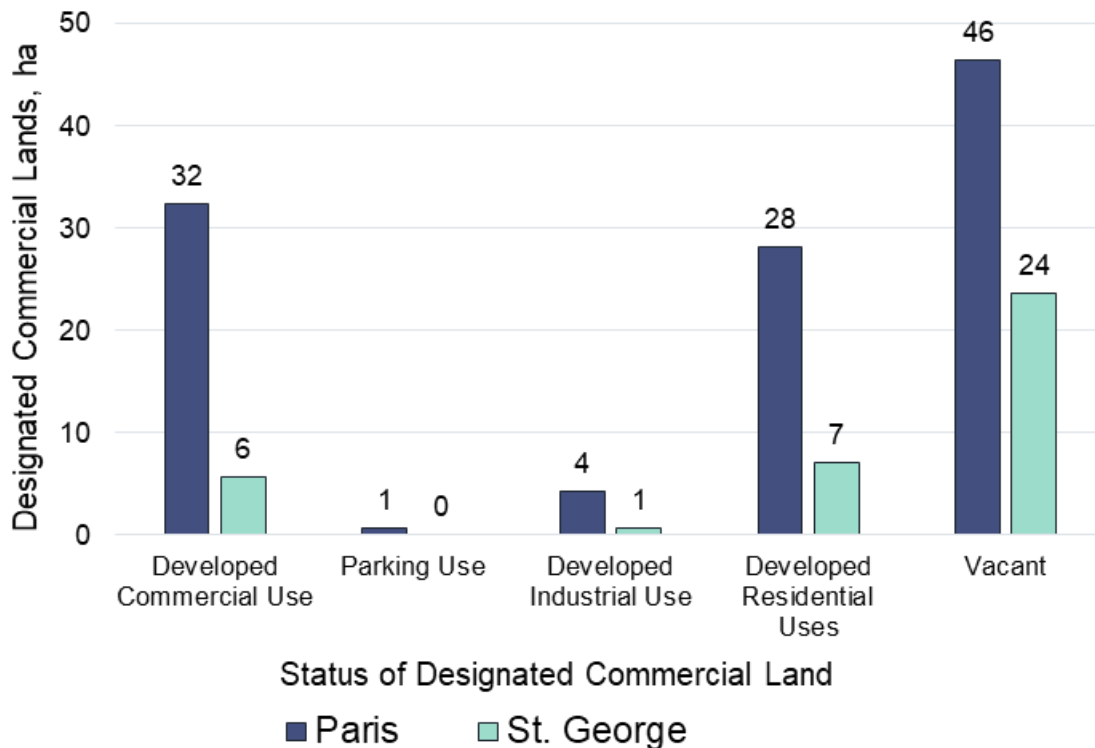
Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

6.7.4 Developed and Vacant Commercial Lands

Overall, the County has approximately 149 ha of designated commercial land in St. George and Paris. Figure 6-34 summarizes the status of designated commercial lands within these settlement areas. As summarized in Figure 6-33, the County has 32 ha and 6 ha of developed commercial lands in Paris and St. George, respectively. It is estimated that the vacant commercial land supply represents nearly half (47%) the designated commercial land supply. In addition, a large component of the designated commercial land supply includes lands that are currently occupied by rural single detached dwellings, which over the forecast horizon may provide opportunities for additional commercial development.



Figure 6-34
County of Brant
Status of Designated Commercial Land
Paris and St. George as of January 2021



Source: Watson & Associates Economists Ltd. as of January 2021 based on a desktop review of aerial imagery and site visits.

Appendix G provides mapping on the designated commercial land supply, while Appendix F provides details on the commercial building space on developed commercial lands.

6.7.5 Disruptors and Outlook for Commercial Growth

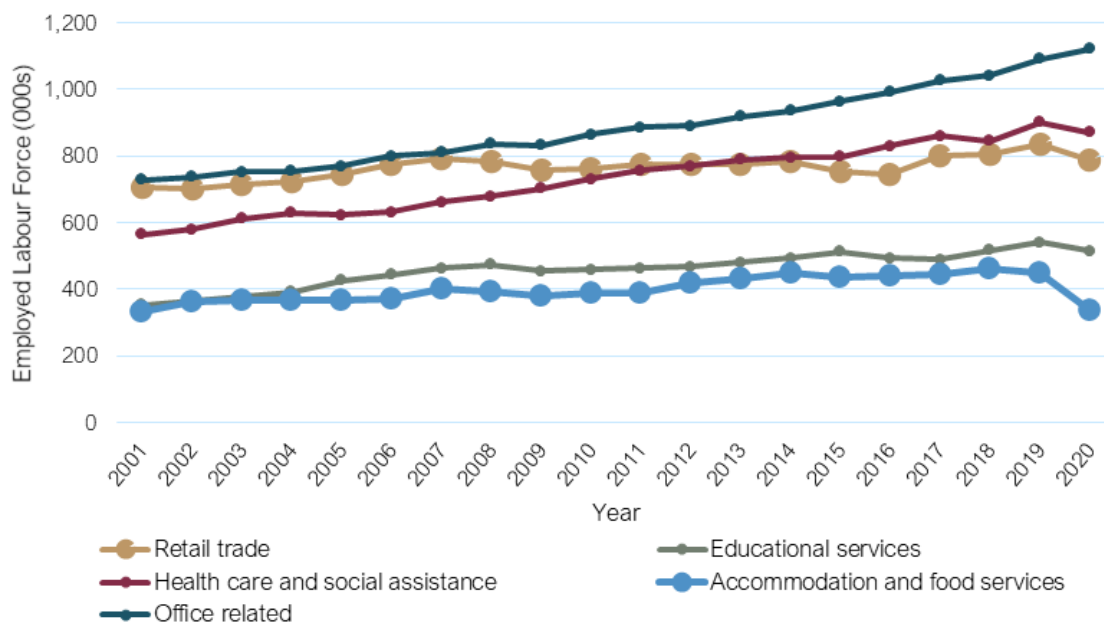
There are a number of major retail trends influencing the commercial landscape across the Country, which generally will influence the demand for retail and commercial space within the County of Brant. These trends are discussed below.



6.7.5.1 Labour Trends in Population-Related Employment Sectors in Ontario

Figure 6-35 summarizes employment growth trends within P.R.E. sectors over the past two decades (i.e., 2001 to 2020). As shown, employment within the retail trade sector has remained relatively stable over the period, while office-related and health care and social assistance have grown and become larger components of the employment base in Ontario. The expansion of these sectors has resulted in an increase of health-care practices and a rise in the number of office tenants within shopping centres and retail plazas that provide convenient locations to their clients. These sectors typically can accommodate up to 30% or 40% of the gross leasable area (G.L.A.) space of a retail site. Other than office-based sectors, all sectors have experienced a decline in labour force between 2019 and 2020 as a result of the COVID-19 pandemic. This decline has been most evident in the accommodation and food services sector which had generally remained steady since 2001.

Figure 6-35
Ontario
Labour Force Employment by Population-Related Sectors
2001 to 2020



Source: Derived from Statistics Canada Table 14-10-0023-01 by Watson & Associates Economists Ltd., 2021.



6.7.5.2 E-Commerce Retail Sales

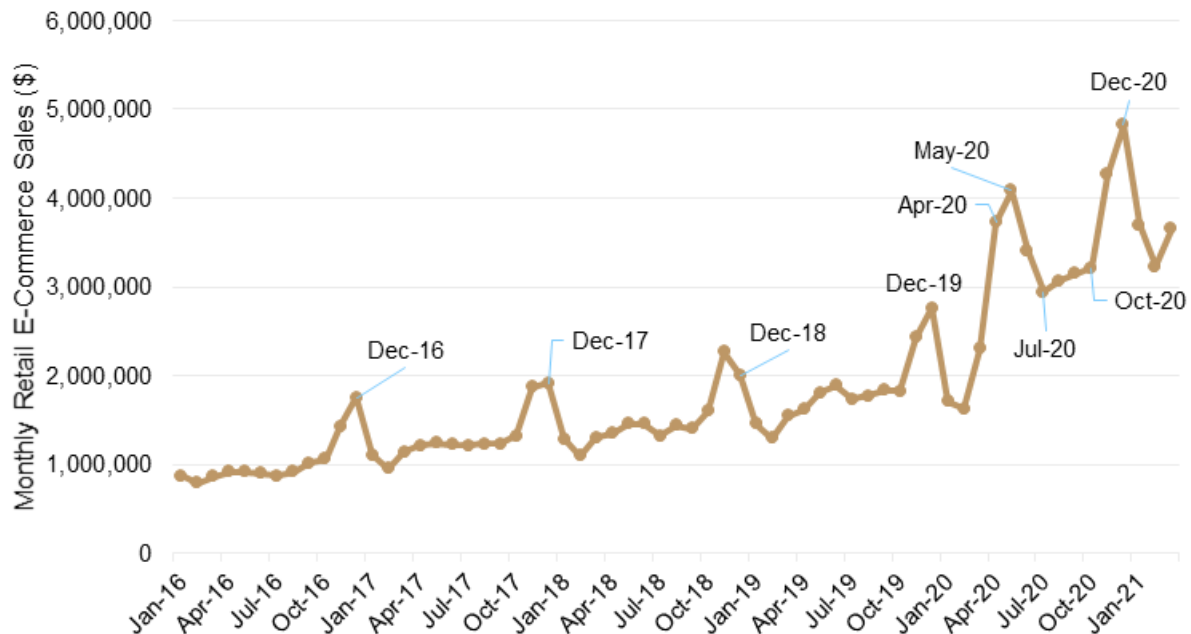
Figure 6-36 illustrates the monthly e-commerce retail sales since 2016. Since that time, e-commerce sales have increased significantly; between January 2016 and January 2021, there has been an increase of 322% in overall retail e-commerce sales. The COVID-19 lockdown which involved the temporary closure of stores in the second quarter of 2020 and during the first half of 2021, resulted in a significant increase in e-commerce spending. May 2020 represented the largest single-month increase in non-seasonal (excluding November and December) e-commerce spending in Canada. Canada is one of the largest e-commerce markets in the world and depending on the source is often placed within the top ten by country in terms of e-commerce sales, ahead of Russia, Spain, Italy and Brazil.¹ Retail e-commerce sales have risen steadily in Canada, with the proportion of online sales to total retail trade rising from 2.4% in 2016 to 7.8% percent in December 2020.² It is anticipated that e-commerce levels will eventually drop with the gradual re-opening of stores, restaurants and other service commercial uses in Canada post the COVID-19 pandemic. Further, the recent announcement by the Canadian government that it will ease the quarantine requirements for fully vaccinated international travellers bodes well for the hardest hit travel and hospitality sector. The digital impact of retail sales is even greater with mobile purchasing platforms (e.g., uberEats, Skip the Dishes) that support retail sales of local retailers by providing alternative platforms for purchasing products and services.

¹ Due to the variation of e-commerce reporting by country, there is no standard reporting. Various publications cited Canada often within the top ten. Sources with publications on e-commerce reporting include eMarketer, Forbes, Statista and J.P. Morgan Chase Bank.

² Statistics Canada, Retail Trade, December 2020, released February 19, 2021.



Figure 6-36
Canada
Monthly Canadian E-commerce Sales
January 2016 to January 2021



Source: Derived from Statistics Canada, Canadian Monthly E-Commerce sales, January 2016 to January 2021 by Watson & Associates Economists Ltd., 2021.

6.7.5.3 Service-Based Commercial Uses Leading Commercial Growth

The rise of e-commerce has influenced the demand for retail square footage, in particular the demand for retail goods. While e-commerce has been capturing market share from goods-based retailers, growth in service-based retailers continues as they provide social experiences and other services that cannot be purchased remotely. Further, mobile delivery platforms, such as Skip the Dishes and uberEats, are extending the customer reach of food service establishments, including adding convenience for food service establishments that do not offer their own delivery service. Service-based retailers typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-based retailers are driving the intensification of retail plazas, power centres and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers.



6.7.5.4 Innovation in Retail Platforms and Delivery

As previously discussed, technology, specifically e-commerce, is providing opportunities for retail and service establishments to better reach customers. In addition, technology is also providing opportunities for innovation in retail platforms. Beyond bricks-and-mortar retail buildings, retailers and service providers are also investing in self-serve kiosks and providing retail platforms on wheels, such as trucks converted to libraries to reach customers and provide access to library resources and staff assistance.

The automation of retail stores is anticipated to have an impact on the function of bricks-and-mortar retail stores, blurring the lines between warehousing and retail. Retailers are utilizing technology used in warehousing to improve profitability, including using robotics to track inventory and automating transactions. The key objectives of increasing automation in a retail store are to increase profitability and enhance convenience for customers. Convenience is typically tied to the dominant mode of traffic to the store and is focused on reducing the time a customer spends at the store. Walmart Canada, for example, recently renovated an existing Scarborough store with a 22,000 sq.ft. (2,000 sq.m) fully automated fulfillment centre where customers drive up to automated kiosks that can serve more than five customers at a time.

6.7.5.5 Increasing Productivity of Retail Stores

Retailers are embracing the concept of “just-in-time retail” which involves using the latest technologies in controlling product inventory and applying scheduling techniques to provide the same product assortment with less real-estate square footage.

While “sales per square foot (sq.ft.)” has been a typical measuring metric for store performance, retailers are now also evaluating store performance based on meeting other corporate objectives, including enabling e-commerce sales or creating a showroom for brand experiences.

6.7.5.6 Small Store and “Right-Size” Store Format

The majority of Canada’s top retail players (e.g., Canadian Tire, Sobeys, and Loblaw), which have traditionally been “big-box” retailers, have developed small-store prototypes that range in size from 5,000 to 20,000 sq.ft. (460 to 1,860 sq.m). The small-store prototype is about serving a more defined targeted demographic from a smaller local trading area and pursuing infill opportunities that may have been overlooked in the past.



The small-store footprint provides developers with greater flexibility in incorporating retail into mixed-use developments and small infill retail sites.

With the exit of large retailers from Canada within the past decade (e.g., Sears, Target, and Future Shop), retail property owners are redeveloping or breaking up big-box retail buildings into multiple retail units. Further, over the past few years, retailers have been rationalizing retail networks which has led to some store closures and downsizing of leased space to a “right-sized” footprint (i.e., leased space is being subdivided).

6.7.5.7 Redeveloping and Re-Purposing Aging Retail Sites

As the retail base is evolving, the retail-built forms of mature retail areas are becoming less desirable and require new building forms and a new tenant mix. As a result, municipalities and developers across Canada are exploring opportunities for the redevelopment of aging retail sites to other uses (i.e., mixed use) or other retail development concepts.

6.7.5.8 Farmgate Retail in the Rural Area

Farmgate retail businesses are market outlets on agriculture land where farmers sell agricultural and craft products directly to the consumer, local restaurants and caterers. Farmgate retail can range from a produce stand to an all-season store. Farmgate retail has become an increasingly important component of rural tourism and commerce, especially within the County of Brant. Farmgate provides an opportunity for urban residents to connect with farmers, while providing an opportunity for farmers to supplement income with another revenue stream that contributes towards the long-term sustainability of farming. Provincial policies support this type of activity. The P.P.S., 2020 supports on-farm diversified uses which allow farms to explore options for generating income to help support agriculture for the long term. O.P. policies and zoning by-laws accommodating this form of rural commerce range across the G.G.H. The County of Brant O.P.’s supports and permits small-scale farmgate retail with some conditions.¹

¹ County of Brant Official Plan, 2012, Policy 1.11.2.6.2, p. 1-16.



6.7.6 National Commercial Outlook

Since the early 2000s, retail growth in Canada has primarily focused on infilling existing retail sites through “baby-box” retail pads (smaller retailers with a similar building design to big-box retailers) in power centres, expansions of regional shopping centres and retail growth oriented towards serving the local needs of a neighbourhood. National and regional retail trends suggest that retail growth will continue through infilling efforts on existing retail sites, with an emphasis on retail uses focused on local-serving uses (e.g., food store, pharmacy), experiences (e.g., food services, escape rooms and bars), services (e.g., tutoring centres, dry cleaning, daycare, hair salon and medical/dental offices) and “bargain hunting” retail destinations with no e-commerce platforms (e.g., Dollarama, HomeSense and Winners). These retail uses tend to have a smaller retail footprint ranging from 1,500 sq.ft. (140 sq.m) up to 40,000 sq.ft. (3,700 sq.m) which provides more flexibility in accommodating mixed-use or intensification environments.

The anticipated population growth in the County of Brant will continue to support demand for new local-serving retail, as consumers do not want to travel far to buy these products. Accommodating local-serving retail uses that contribute towards building walkable communities should be a key objective in planning for intensification as well as greenfield areas. Despite the population growth anticipated, other retail uses that are more comparison based (e.g., general merchandise, apparel, furniture and electronics) are expected to grow at a slower pace due to proximity to the City of Brantford and national retail trends.

As previously discussed, e-commerce and automation of retail stores is anticipated to have an impact on the function of bricks-and-mortar retail stores, blurring the lines between warehousing and retail. Planning for retail uses will require a need to focus not only on the type of use, but a review of any secondary functions such as warehousing.

6.8 Community Area Commercial Land Needs to 2051

The following section reviews the commercial demand requirements in Paris and St. George and provides an assessment of whether there is a significant supply of designated commercial lands to accommodate commercial demand. It is important to recognize that this commercial analysis is a sub-set of Community Area land requirements. The purpose of this analysis is to determine whether changes are required within the Community Area to accommodate commercial growth.



6.8.1 Paris Settlement Area

As previously discussed, the Paris Settlement Area has a low commercial vacancy rate and a commercial base primarily oriented towards local-serving retail uses, such as grocery stores, drug stores, restaurants and personal services. Over the forecast horizon, the Paris Settlement Area is anticipated to require 535,000 sq.ft. (49,700 sq.m) of additional commercial building space, approximately 18,000 sq.ft. (1,700 sq.m) of building space annually. Furthermore, over the forecast horizon, the per capita commercial space ratio (commercial space relative to population) is anticipated to increase from 41 sq.ft. of commercial space per resident to 45 sq.ft. (4 sq.m) per resident. Growth on commercial sites is anticipated to comprise local-serving retail uses, as well as institutional uses, such as medical/dental offices. While the per capita commercial space is low relative to other comparable communities in the G.G.H., it is important to recognize the national commercial trends such as e-commerce, which reduce the need for commercial space.

Figure 6-37
Paris Settlement Area
Commercial G.L.A. Space Demand (sq.ft.), 2021 to 2051

Period	Population	Commercial G.L.A. Space (sq.ft.)	Per Capita Commercial Space (sq.ft. per resident)
2021	14,400	596,000	41
2031	18,800	796,000	42
2041	21,900	950,000	43
2051	25,400	1,131,000	45
2021-2051	11,000	535,000	49

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-38, approximately 119,000 sq.ft. (11,000 sq.m) of commercial building space is anticipated to be accommodated on existing developed sites (intensification), while 416,000 sq.ft. (38,600 sq.m) is anticipated to be accommodated on new lands.



Figure 6-38
Paris Settlement Area
Commercial G.L.A. Building Space, Intensification and Demand on New Lands,
2021 to 2051

Period	Commercial G.L.A. Space (sq.ft.)	Commercial Growth Accommodated Through Intensification (sq.ft.)	Commercial G.L.A. Demand on New Lands (sq.ft.)
2021-2051	535,000	119,000	416,000

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-39, based on building coverage of 25% (the ratio of the building footprint relative to required land area to support the development), there is a demand for 15 ha of designated commercial land. Based on the existing supply of 46 ha of designated commercial land in Paris, there is more than enough designated commercial land to support the commercial growth forecast over the planning horizon. As a result, there is a surplus of 31 ha of designated commercial lands.

Figure 6-39
Paris Settlement Area
Commercial Land Requirement (ha), 2021 to 2051

Period	Commercial G.L.A. Demand on New Lands (sq.ft.)	Commercial Building Coverage	Commercial Land Demand (ha)	Commercial Land Supply (ha)	Commercial Land Surplus (ha)
2021-2051	416,000	25%	15	46	31

Source: Watson & Associates Economists Ltd.

6.8.2 St. George Settlement Area

As previously discussed, the Paris Settlement Area has a low commercial vacancy rate and a small commercial base. Residents within St. George would generally require frequent shopping trips outside the community to support commercial needs. As summarized in Figure 6-40, over the forecast horizon, the St. George Settlement Area is anticipated to require 165,000 sq.ft. (15,000 sq.m) of additional commercial building



space, approximately 5,500 sq.ft. (510 sq.m) of building space annually. Furthermore, over the forecast horizon, the per capita commercial space ratio (commercial space relative to population) is anticipated to increase from 26 sq.ft. (2.4 sq.m) of commercial space per resident to 34 sq.ft. (3 sq.m) per resident. Growth on commercial sites is anticipated to comprise local-serving retail uses, as well as institutional uses such as medical/dental offices. While the per capita commercial space is low relative to other comparable communities in the G.G.H., it is important to recognize the proximity of St. George to larger urban centres such as Paris.

Figure 6-40
St. George Settlement Area
Commercial G.L.A. Space Demand (sq.ft.), 2021 to 2051

Period	Population	Commercial G.L.A. Space, (sq.ft.)	Per Capita Commercial Space (sq.ft. per resident)
2021	3,500	90,000	26
2031	4,300	120,000	28
2041	6,000	192,000	32
2051	7,500	255,000	34
2021-2051	4,000	165,000	41

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-41, approximately 27,000 sq.ft. (2,500 sq.m) of commercial building space is anticipated to be accommodated on existing developed sites (intensification), while 138,000 sq.ft. (12,800 sq.m) is anticipated to be accommodated on new lands.



Figure 6-41
St. George Settlement Area
Commercial G.L.A. Building Space, Intensification and Demand on New Lands,
2021 to 2051

Period	Commercial G.L.A. Space, (sq.ft.)	Commercial Growth Accommodated Through Intensification (sq.ft.)	Commercial Demand on New Lands (sq.ft.)
2021-2051	165,000	27,000	138,000

Source: Watson & Associates Economists Ltd.

As summarized in Figure 6-42, based on building coverage of 25% (the ratio of the building footprint relative to required land area to support the development), there is a demand for 5 ha of designated commercial land. Based on the existing supply of 24 ha of designated commercial land in St. George, there is more than enough designated commercial land to support the commercial growth forecast over the planning horizon. As a result, there is a surplus of 18 ha of designated commercial lands.

Figure 6-42
St. George Settlement Area
Commercial Land Requirement (ha), 2021 to 2051

Period	Commercial G.L.A. Demand on New Lands (sq.ft.)	Commercial Building Coverage	Commercial Land Demand (ha)	Commercial Land Supply (ha)	Commercial Land Surplus (ha)
2021-2051	138,000	25%	5	24	18

Source: Watson & Associates Economists Ltd.

6.8.3 Urban Commercial Land Requirement

The County of Brant has a surplus of approximately 49 ha of designated urban commercial land to accommodate the commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.



6.9 Employment Area Overview

6.9.1 County of Brant Official Plan Employment Area Policies

As per section 3.12 of the County O.P., the Employment designation applies to land that is comprised of or intended to be developed for light, heavy and prestige industrial uses, limited-service commercial uses, and related uses. Other uses permitted within the Employment designation include hotels/motels in cases where the employment lands have frontage on an arterial road, commercial recreational uses, and agricultural uses. Uses not permitted include institutional, general commercial, and large format retail.

In accordance with section 3.12.3 of the O.P., save and except for land identified as Site Specific Policy Area 16 in section 4.2.16 of this Plan (Priority Employment Areas), the County may permit conversion of land designated Employment to non-employment uses without an M.C.R. or Area Study subject to meeting the conditions mentioned in the section.

6.9.1.1 County of Brant Official Plan Employment Policies

In addition to Employment Area policies in section 3.12, there are certain site-specific policy areas identified within the O.P. These include the following:

6.9.1.1.1 Site Specific Policy Area 2 – Cainsville/Brant East Employment Lands

These lands include the Employment designated areas in the settlement area of Cainsville/Brant East. Industrial development shall only occur on these lands after the provision of full services.

6.9.1.1.2 Site Specific Policy Area 15 – Oakhill/Airport Area

Site Specific Policy Area 15 includes lands within the Oakhill/Airport Area, and the area including and abutting the Brantford Airport as identified in Schedule A of the O.P. For these lands, the permitted use shall be limited to uses that have limited or restricted outside storage, light industrial uses and may also include workshops, warehouses, service shops, commercial land uses such as office supplies, home furnishings and appliances, veterinary offices, funeral homes, assembly halls and recreational facilities. All development on the lands should include prestige site design characteristics.



It is further noted in the O.P. that the Brantford Municipal Airport is a multi-use facility owned and operated by the City of Brantford and the restrictions noted in Site Specific Policy Area 15 are not intended to impact upon the operations of the Brantford Airport.

6.9.1.1.3 Site Specific Policy Area 22 – St. George Employment Designation

The Employment Area in St. George has been identified as providing no municipal wastewater services. Accordingly, permitted uses in the Employment Area are required to have regard to partial services and do not result in excessive amounts of wastewater. Dry industrial and employment uses with minimal wastewater produced from industrial processing, washing, cooling or other purposes are to be considered for this area. It is noted that the zoning by-law will specifically define the dry employment and industrial uses that are permitted in this area. It is further noted that the County will encourage the application of water conservation technologies as well as low-impact development principles.¹

6.9.1.1.4 Site Specific Policy Area 16 - Priority Employment Areas

As part of the M.C.R. of Employment Lands (2009), it was established that there are more vacant employment lands within the County than what is required to meet the needs within the planning period. The areas identified as priority Employment Areas include certain Employment designated areas (including the Paris 403 Business Park, the Highway 25 and Highway 403 Employment Area, and the Paris Southeast Employment Area) and have been identified in Schedule A of the O.P.

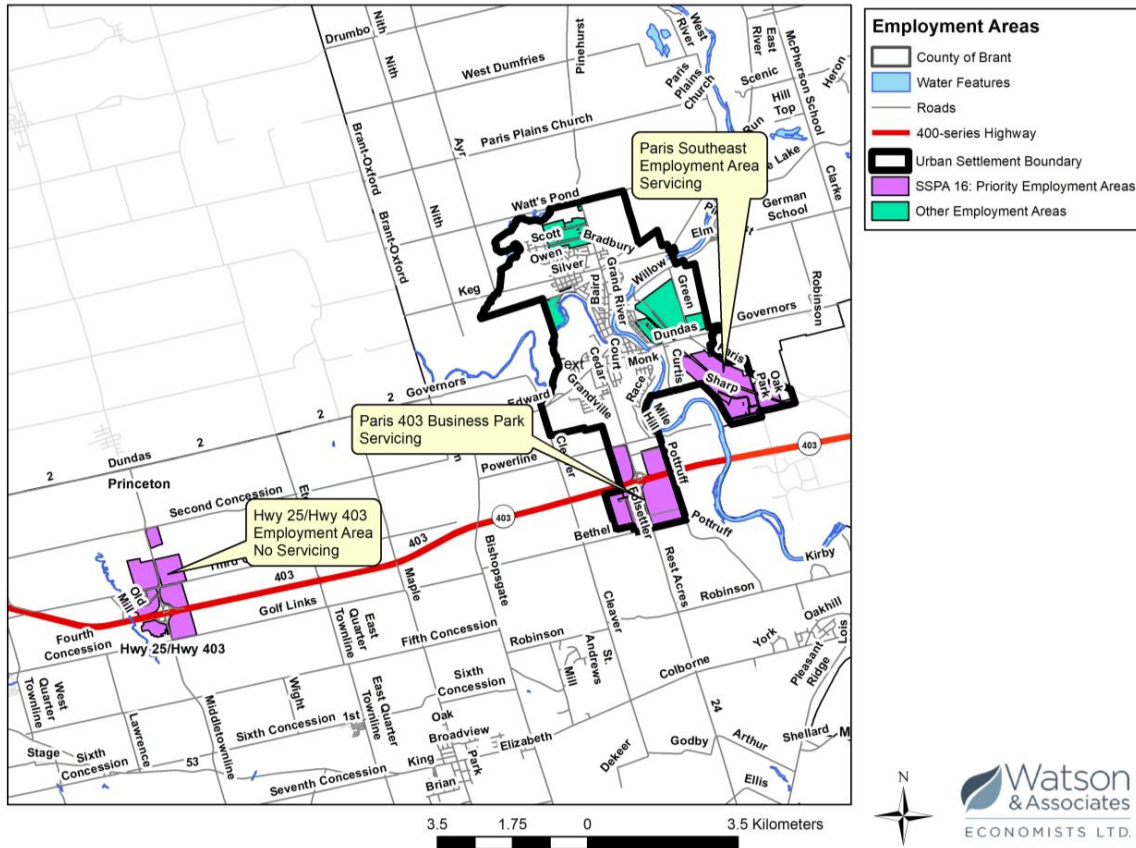
These areas are intended to have a greater level of protection from conversion to non-employment uses and an M.C.R and Area Study shall be required prior to the consideration of a change from Employment to another land use. The lands included as Special Policy Area 16, located along the Highway 403 corridor, have been identified as a priority for employment uses related to green energy technology.

Figure 6-43 provides the location of the Priority Employment Areas.

¹ County of Brant Official Plan, 2021, Policy 4.1.22., pp. 5-8 and 5-9.



Figure 6-43
County of Brant
S.S.P.A. 16 – Priority Employment Areas



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

6.9.2 Characteristics of the County of Brant's Employment Areas

The County's Employment Area base is comprised of a blend of Employment Areas with full servicing, partial servicing (water only) and private services (i.e., no water and wastewater municipal servicing). Employment Areas in Paris provide full municipal servicing and opportunities to accommodate additional serviced employment sites. While St. George is a part of the County's urban system, the Employment Area in St. George currently contains water only servicing. Employment Areas in the Rural System, including Cainsville and the Airport Employment Area have servicing, but there



are currently limitations on servicing. The Cainsville Employment Area is anticipated to expand municipal servicing to accommodate new development.¹

Employment Areas in Paris provide urban amenities that compete with Urban Employment Areas in the G.G.H., including Employment Areas with arterial road and highway access, as well as park/recreational and commercial amenities in proximity to Employment Areas.

6.9.3 Employment Area Land Supply Inventory Approach

In generating this employment land inventory, all parcels designated in the County's O.P. as "Employment" have been reviewed. The supply review was carried out in accordance with the provincial L.N.A. The analysis was completed primarily through a desktop review using G.I.S. mapping software and the review and assistance of County of Brant staff. Spatial overlays utilized to develop the land supply inventory included parcel fabric, land-use layers (including the County of Brant O.P. designation layers), non-residential building permit data, building footprints, hydrology/wetlands and orthophotos. A third-party data source, InfoCanada Business Directory, was utilized to estimate employment and employment density on developed sites.

It is important to note that the land supply includes the parcel as well as internal infrastructure such as local roads and stormwater ponds. The land supply excludes environmental features (Natural Heritage System), highways, utilities corridors and cemeteries. As noted, the supply analysis was completed in accordance with provincial L.N.A. requirements.

Employment lands are considered developed if a building permit has been issued by January 1, 2021 and the land is anticipated to be occupied with employment by mid-2021. It is important to note that sites are identified as occupied if there is a building on the parcel or a permit has been issued as of January 1, 2021.

As part of the analysis, Watson with assistance with the County of Brant staff identified sites that would likely remain undeveloped by 2051 due to site constraints such as parcels with no existing/planned roads. Sites where environmental and/or topography features may reduce marketability were also discounted from the inventory. As an

¹ Expansion of municipal servicing is currently under review by the County as part of an agreement with the City of Brantford.



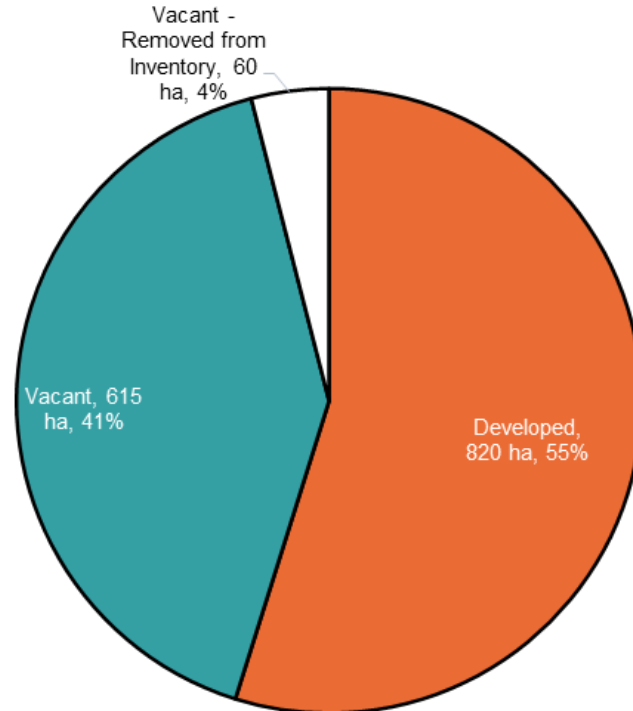
example, the Employment Area near the former landfill and railway line in the west Paris area has been removed from the inventory. In total, approximately 60 ha of designated Employment Area land has been removed from the County's Employment Area land supply inventory.

The land supply review includes all parcels designated as Employment in the County's O.P. The Urban Employment Area land needs includes only those designated within the settlement area of Paris and St. George in accordance with the provincial L.N.A. Employment Areas outside the Paris and St. George area considered Rural Employment Areas are not required to be identified in terms of land requirements. The expansion of Rural Employment Areas as discussed in Chapter 8 is reviewed based on different provincial policy requirements and considerations.

As summarized in Figure 6-44, the County has approximately 1,500 ha of designated Employment Area land (occupied/vacant) and approximately 55% of the land inventory is occupied/developed. Employment Area land supply mapping is provided in Appendix H (Urban) and Appendix J (Rural).



Figure 6-44
County of Brant
Designated Employment Areas
Land Supply by Supply Status (ha), 2021



Source: Watson & Associates Economists Ltd.

6.9.3.1 *Employment Area Classification*

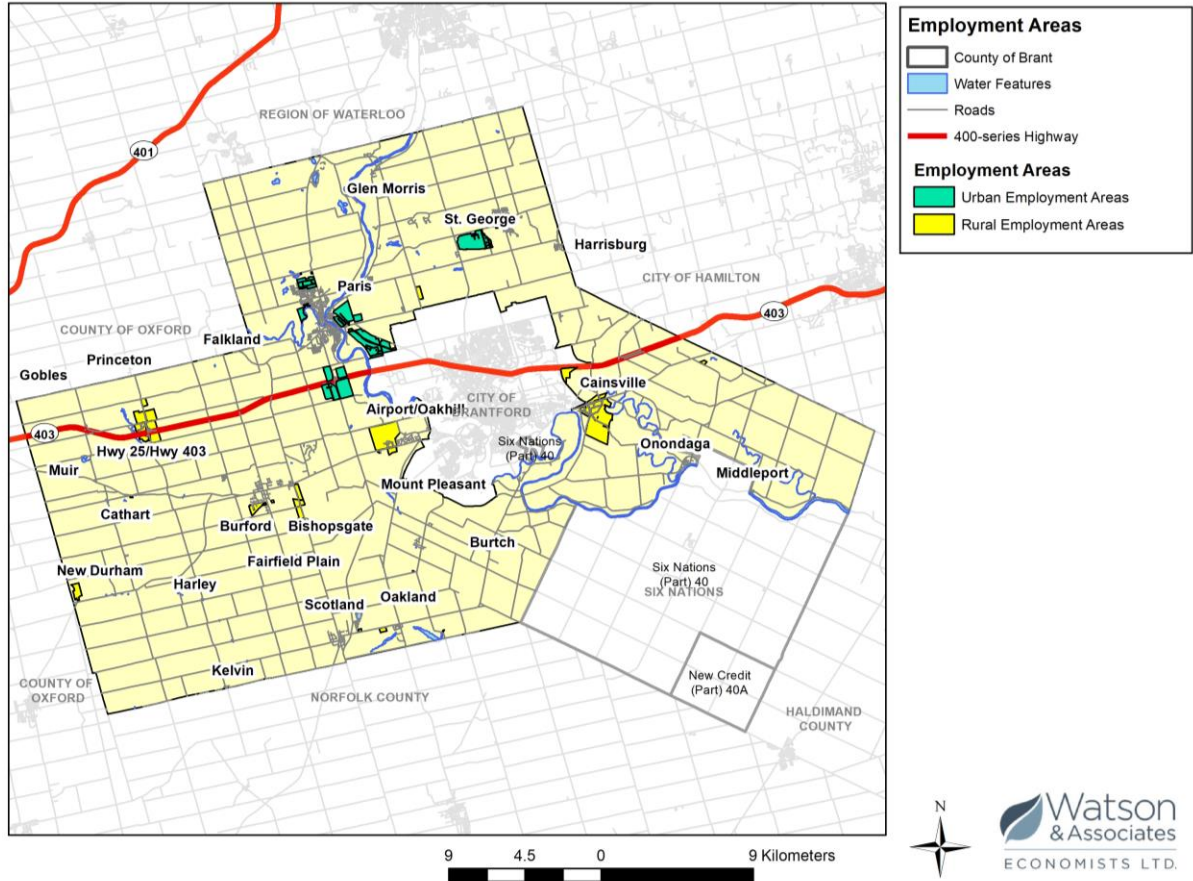
As previously noted, the County's Employment Area Land Supply is classified in two broad categories:

- Urban Employment Areas – Paris and St. George; and
- Rural Employment Areas – Cainsville Employment Area; Burford Employment Area; Highway 25/Highway 403 Employment Area; Airport Employment Area; and New Durham Employment Area.

Figure 6-45 illustrates the location of Urban Employment Areas (identified in green) and Rural Employment Areas (identified in yellow).



Figure 6-45
County of Brant
Existing Designated Employment Areas



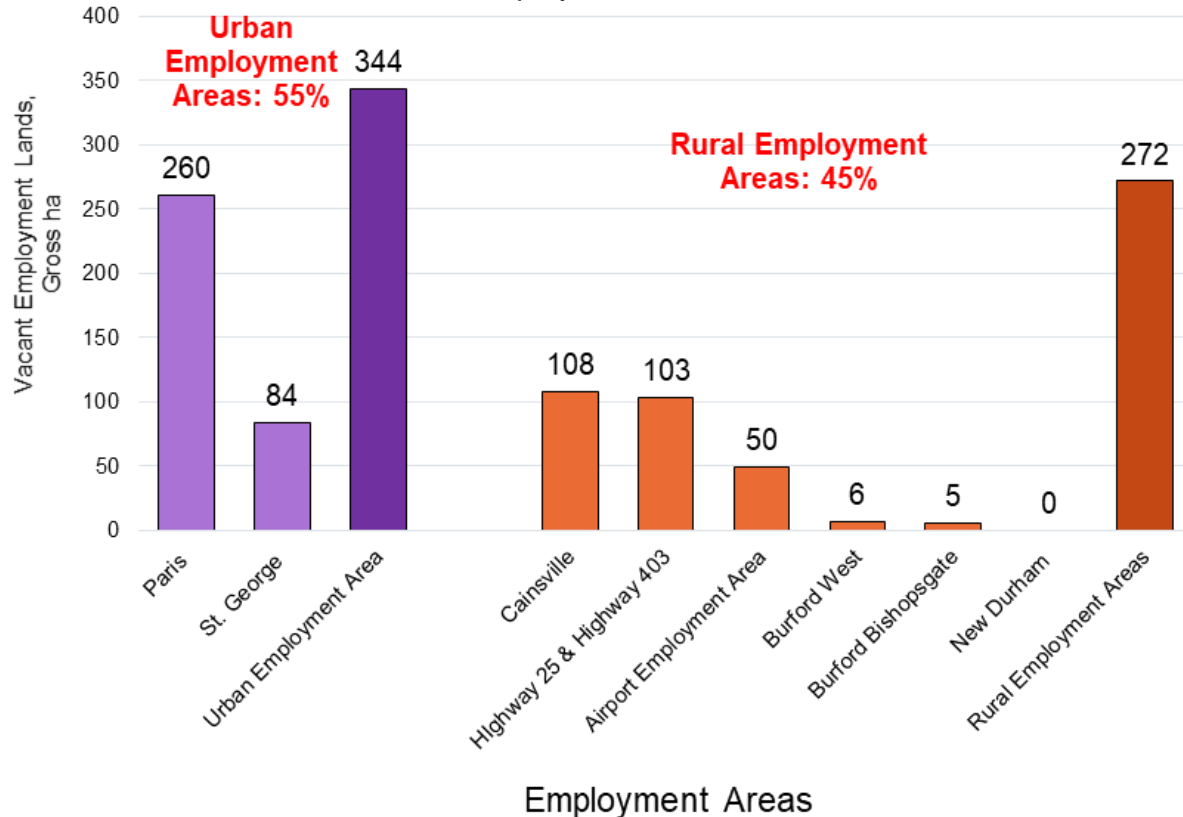
Source: Watson & Associates Economists Ltd.

6.9.3.2 County-wide Employment Area Inventory by Employment Area

As of January 1, 2021, the County has a land supply of 615 ha of vacant designated lands in Employment Areas. Approximately 344 ha of designated land is available within the Urban System (Paris and St. George), as identified in Figure 6-46. As of January 1, 2021, approximately 356 ha of Employment Area land in Paris and St. George was developed.



Figure 6-46
County of Brant
Designated Employment Areas
Vacant Employment Lands, Gross ha



Note: Gross land area calculated in accordance with requirements of the Growth Plan.
Source: Watson & Associates Economists Ltd.

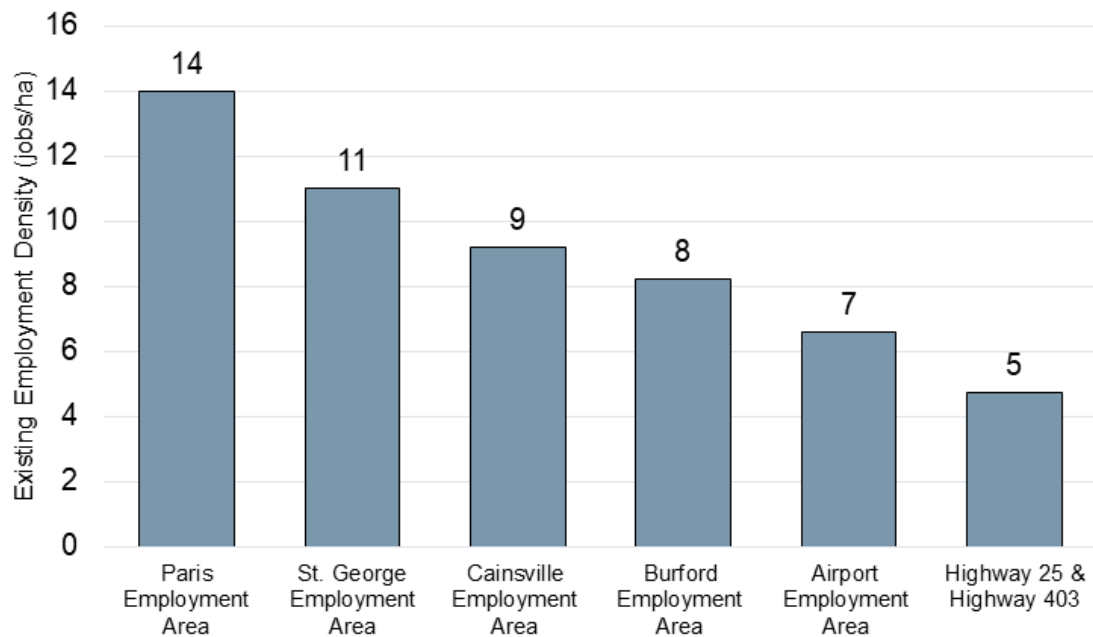
6.9.3.3 Employment Area Density

As summarized in Figure 6-47, the existing employment density in the County's Employment Areas ranges from 5 jobs/gross ha in the Highway 25/Highway 403 Employment Area to 14 jobs/gross ha in Paris (15 jobs/net ha). Over the past decade, the average employment density on recently absorbed parcels has generally been lower or near the existing density average. This can be largely attributed to a few land-extensive industrial developments in Paris. Within Paris, the Southeast Employment Area has the highest Employment Area density at 23 jobs/gross ha. The higher employment density is largely attributed to long-established major manufacturing employers, including Tigercat and Patriot Forge, as well as businesses on small



parcels. Of the developed parcels in Paris, less than a third (approximately 29%) of developed parcels have a density higher than 14 jobs/gross ha and most of these parcels were developed more than a decade ago.

Figure 6-47
County of Brant
Employment Area Employment Density (jobs/gross ha)
by Employment Area 2021



Source: Watson & Associates Economists Ltd. based on InfoCanada Business Database and developed sites identified by Watson.



Figure 6-48
County of Brant
Employment Area Employment Density (jobs/gross ha)
Paris and St. George

Employment Areas	2021 Developed (gross ha)	2021 Employment Estimates	Employment Density (jobs/gross ha)
Paris Employment Areas	339	4,700	14
St. George Employment Areas	49	560	11
Urban Employment Areas	389	5,260	14
Rural Employment Areas	431	3,860	9
Total Employment Areas	820	9,120	11

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.

There are two diverging trends across the G.G.H. which are influencing average density trends on employment lands. On the one hand, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive warehousing and logistics facilities to support distribution and transportation of goods throughout the rapidly expanding G.G.H. population base.

On the other hand, growing demand within the multi-tenant industrial/commercial uses (including small-scale office) with a range of diverse employment uses is anticipated to have a modest upward influence on average employment densities on employment lands over the long term.

In accordance with the broader density discussed above, it is anticipated that employment densities on employment lands in Paris and St. George will be comparable to existing density levels over the long term (i.e., 2051).

6.9.3.4 Historical Urban Employment Area Land Absorption

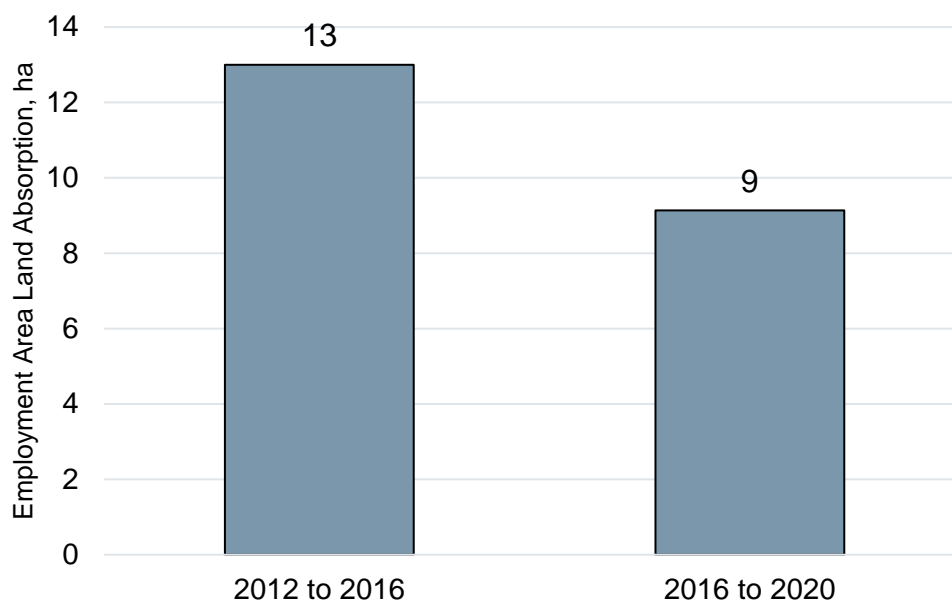
Figure 6-49 provides a summary of the annual Employment Area land absorption in Paris over the 2012 to 2016 period and over the most recent few years (2016 to 2020).



Employment Area land absorption averaged 13 ha annually over the 2012 to 2016 period. In 2012, the Paris 403 Business Park opened for development. Two years after the opening of the Paris 403 Business Park, absorption totalled 48 ha. Since 2016, Employment Area land absorption averaged 9 ha annually. Absorption was primarily concentrated in the Paris Southeast Employment Area and the Paris 403 Business Park, specifically the lands to the southwest of Rest Acres/Highway 403.

Since 2012, Employment Area land absorption within the St. George Employment Area has been minimal.

Figure 6-49
County of Brant
Paris Employment Areas
Average Annual Employment Area Land Absorption (ha), 2012 to 2020



Source: Watson & Associates Economists Ltd.

6.9.3.5 *Urban Employment Areas in Paris*

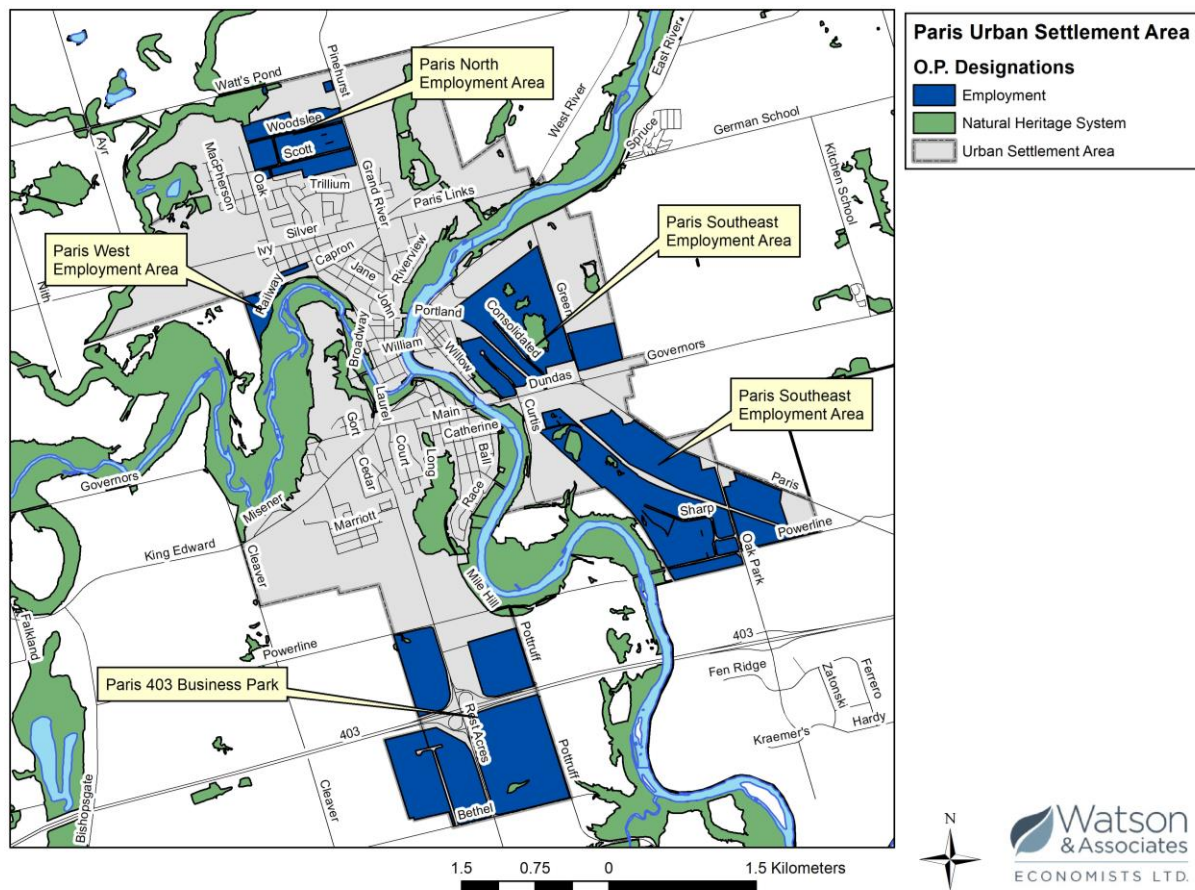
Figure 6-50 provides a map of the location of Employment Areas in Paris and includes the following five Employment Areas:

- Paris North Employment;



- Paris Southeast Employment Area;
- Paris West Employment Area; and
- Paris 403 Business Park.

Figure 6-50
County of Brant
Designated Employment Areas in Paris Settlement Area
Location of Employment Areas



Provided below is a brief description of the Employment Areas.

Paris North Employment Area

The North Paris Employment Area is a mature Employment Area of approximately 62 gross ha located in the north-end of Paris. The Employment Area is located west of Grand River Street North. The Employment Area has approximately 10 ha of vacant



Employment Area land and accommodates a mix of industrial sectors, as well as commercial uses.

Large employers in this Employment Area include Miss Mary Maxim (craft supply distributor) and Pinty's Delicious Foods Inc. (food distributor). Most businesses in this Employment Area are small and medium-sized employers with less than 50 employees and no parcel exceeds 5 ha in size.

Paris West Employment Area

The Paris West Employment Area is a mature Employment Area located near the railway yard and former landfill in Paris. The Employment Area accommodates a small employment base on a few small parcels. The developable land area of this Employment Area is small, i.e., less than 20 ha. Due to site constraints (topography and environmental features) this Employment Area offers no vacant parcels for development. Employers in this area include Paris Kitchens (cabinet manufacturer) and a few small businesses.

Paris Southeast Employment Area

The Paris Southeast Employment Area is a mature Employment Area with 107 ha of vacant Employment Area lands with a range of parcel sizes available. This Employment Area includes a diverse range of businesses, including heavy and light industrial uses. A designated commercial area separates the Employment Area into two areas along the major arterial street, Dundas Street. The adjacent commercial area also provides commercial uses that support the function of the Employment Area, including restaurants, a motel and a cardlock facility. The Paris Southeast Employment Area provides opportunities for intensification on large, underutilized parcels. Intensification potential mapping is provided in Appendix I.

Major employers include Tigercat (equipment manufacturer), Patriot Forge Inc. (steel fabricator) and CoorsTek Paris (ceramics manufacturer). Other employers include a range of small and medium businesses in construction, logistics/warehousing/trucking and manufacturing.



Paris 403 Business Park

The Paris 403 Business Park is the newest Employment Area in Paris (opening in 2012) and is surrounded by the 403 Highway/Rest Acres Road interchange. The Employment Area is approximately 220 ha in area, with approximately 143 ha of undeveloped land. Since 2012, the majority of Employment Area land absorption in Paris has occurred in this Employment Area. Given the proximity and access to the Highway 403 interchange, the Paris 403 Business Park provides opportunities for prestige Employment Area uses.

Major employers include Adidas (sporting goods warehouse operation) and BGI Retail (display stand manufacturer), Scotlynn Commodities (transportation provider) and an Ontario Provincial Police Station.

6.9.3.6 Urban Employment Areas in St. George

Figure 6-51 provides a map of the location of Employment Areas in St. George. Within St. George there is a large Employment Area (Site Specific Policy Area 22) with water-only servicing and one fragmented employment land site, Site Specific Policy Area 17. Site Specific Policy Area 17 is the former Parmalat industrial site. In addition, to employment uses, this site permits residential uses. Since this site permits non-Employment Area uses, it has been excluded from the land supply inventory.

Employment Area, S.S.P.A. 22 has been identified in the current County's O.P. (2012) as not planned to accommodate wastewater services. Permitted uses are limited to dry employment and industrial uses that are appropriate for partial services and do not result in excessive amounts of wastewater. Dry industrial and employment uses are considered to be those in which the principal source of wastewater is related to domestic purposes, and minimal wastewater is produced from industrial processing, washing, cooling or other purposes.¹ Occupied uses in this Employment Area include small businesses with generally less than 30 employees per establishment.

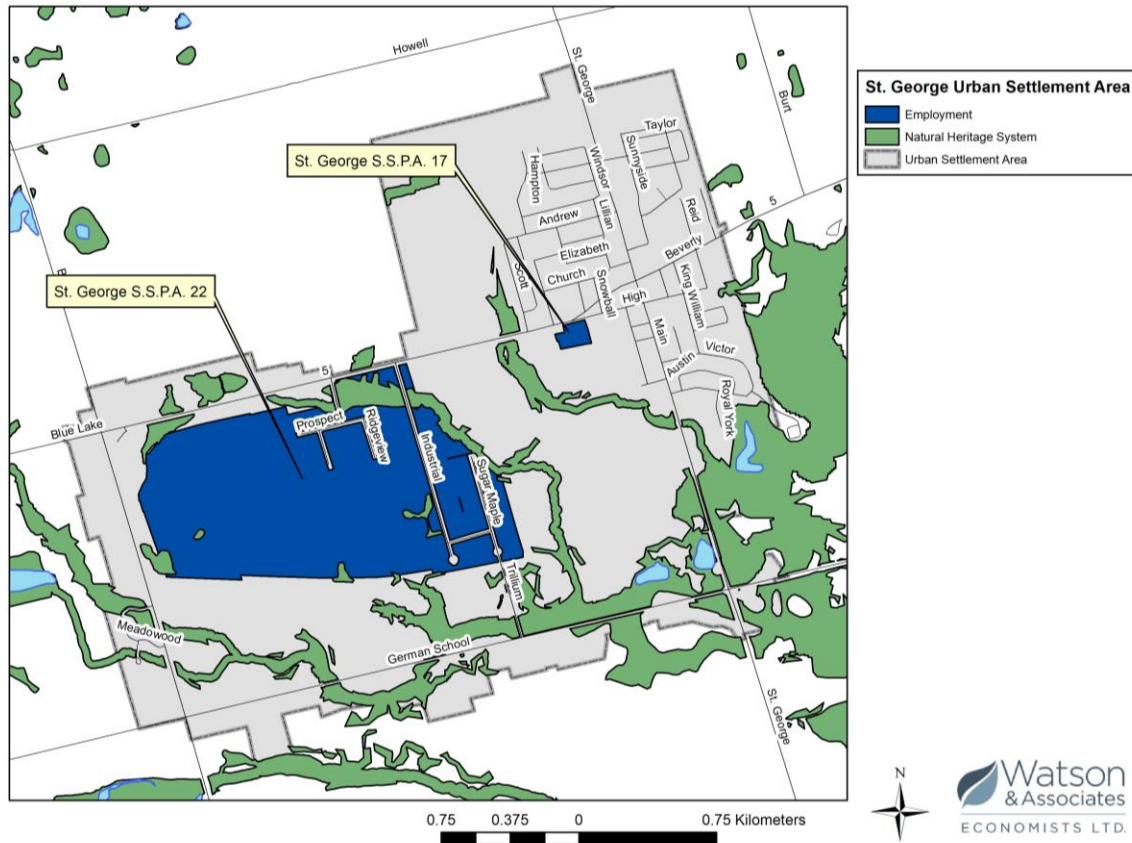
St. George has approximately 84 ha of vacant Employment Area land. It is important to recognize that large tracts of land currently do not have road access. As a result, a

¹ County of Brant Official Plan, 2012, Policy 4.1.22, p. 5-8.



portion (western extent) of the designated land area has been removed from the vacant supply inventory.

Figure 6-51
County of Brant
Designated Employment Areas in St. George Settlement Area
Location of Employment Areas



6.9.4 Developed and Vacant Urban Employment Area Lands

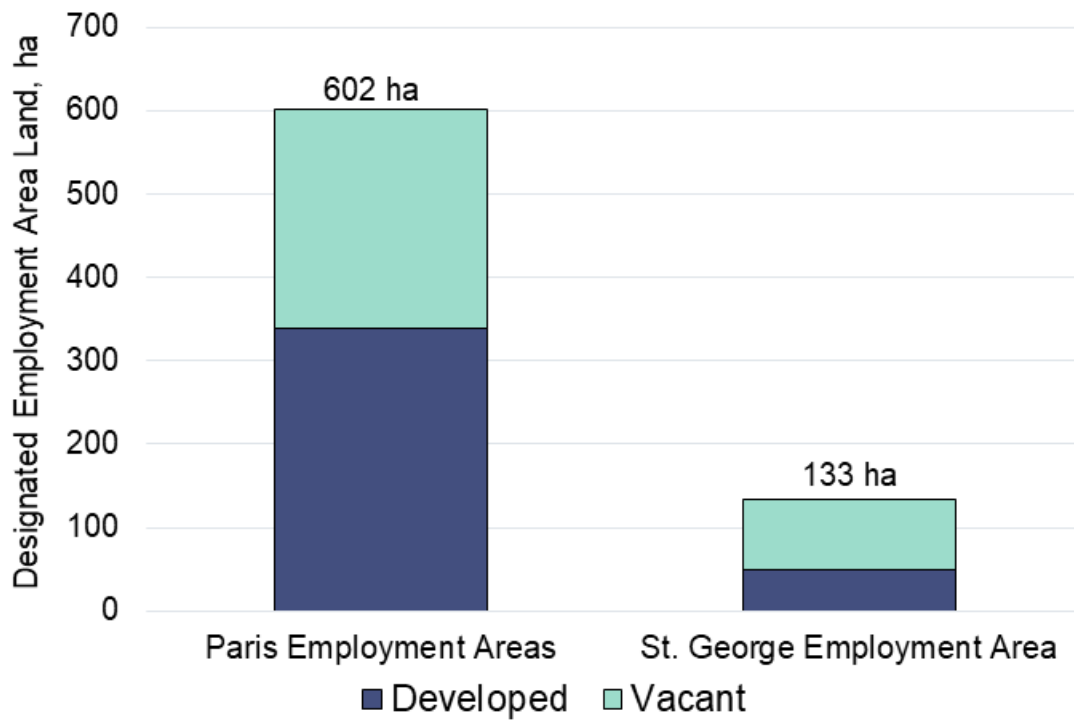
Figures 6-52 and 6-53 provide details on the Employment Area land supply in the County's Urban Employment Areas. Key highlights include the following:

- Paris has a designated Employment Area land supply of 602 ha and approximately 44% of the designated land area is vacant;
- St. George has a designated Employment Area land supply of 133 ha and approximately 62% of the designated land area is vacant; and



- Most of the vacant land supply is comprised of large parcels in Paris and St. George, larger than 10 ha.

Figure 6-52
County of Brant
Developed and Vacant Urban Employment Area Land Supply



Source: Watson & Associates Economists Ltd.



Figure 6-53a
County of Brant
Paris Employment Areas
Vacant Urban Employment Land Supply by Parcel Size

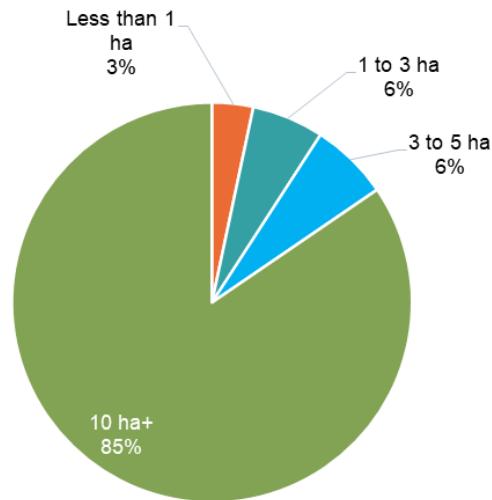
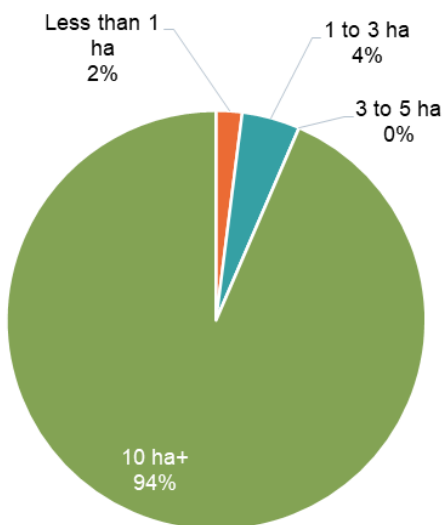


Figure 6-53b
County of Brant
St. George Employment Area
Vacant Urban Employment Land Supply by Parcel Size



Source: Watson & Associates Economists Ltd.



6.9.5 Urban Land Vacancy Allowance Adjustment

This allowance is a necessary downward adjustment to land supply, in order to reflect the fact that 100% of any large area of employment lands is unlikely to be absorbed in the foreseeable future. There are various reasons for this occurring, including:

- parcels have become landlocked or difficult to access, with poor road visibility;
- parcels are held off the market for speculative reasons, such as selective marketing, expansion of an adjacent site, long term land banking or proposed land-use conversion;
- parcels are unusually expensive to service;
- sites are inefficient in size/shape; and
- sites have physical constraints (i.e., poor soil conditions and sites which have unattractive surroundings or potential land-use conflicts).

Figure 6-54 summarizes the land vacancy adjustment for Paris and St. George. A land vacancy adjustment of 15% was assumed for the Paris Employment Areas. As a result, approximately 39 ha of vacant employment land supply has been reduced. A higher land vacancy adjustment of 30% was assumed for the St. George Employment Area reflecting the limitations of the St. George Employment Area due to water-only servicing. Approximately 25 ha have been removed from the St. George Employment Area land supply inventory.

Figure 6-54
County of Brant
Urban Employment Area
Adjusted Vacant Employment Supply

Vacant Employment Area Land	Paris	St. George	Paris & St. George
Supply, gross ha (Vacant)	260	84	344
Land Vacancy Adjustment	15%	30%	19%
Land Vacant Adjustment, deducted, gross ha	39	25	64
Adjusted Land Supply, gross ha	221	58	280

Source: Watson & Associates Economists Ltd.



6.9.6 Intensification Potential in Paris Urban Employment Areas

As part of the land supply review, a review of intensification potential was carried out for the Paris Employment Areas. Employment Areas in Paris have full municipal servicing (water/wastewater). Using G.I.S. parcel fabric data and orthophotos, underutilized employment land parcels were identified in Paris. Parcels with low building coverage of less than 10% and employment lands used for parking and storage were identified as underutilized. It is important to note that the review of the intensification potential on employment lands was carried out as a desktop review and is based on a single criterion, building coverage. This review is considered the first step in understanding the County's intensification potential.

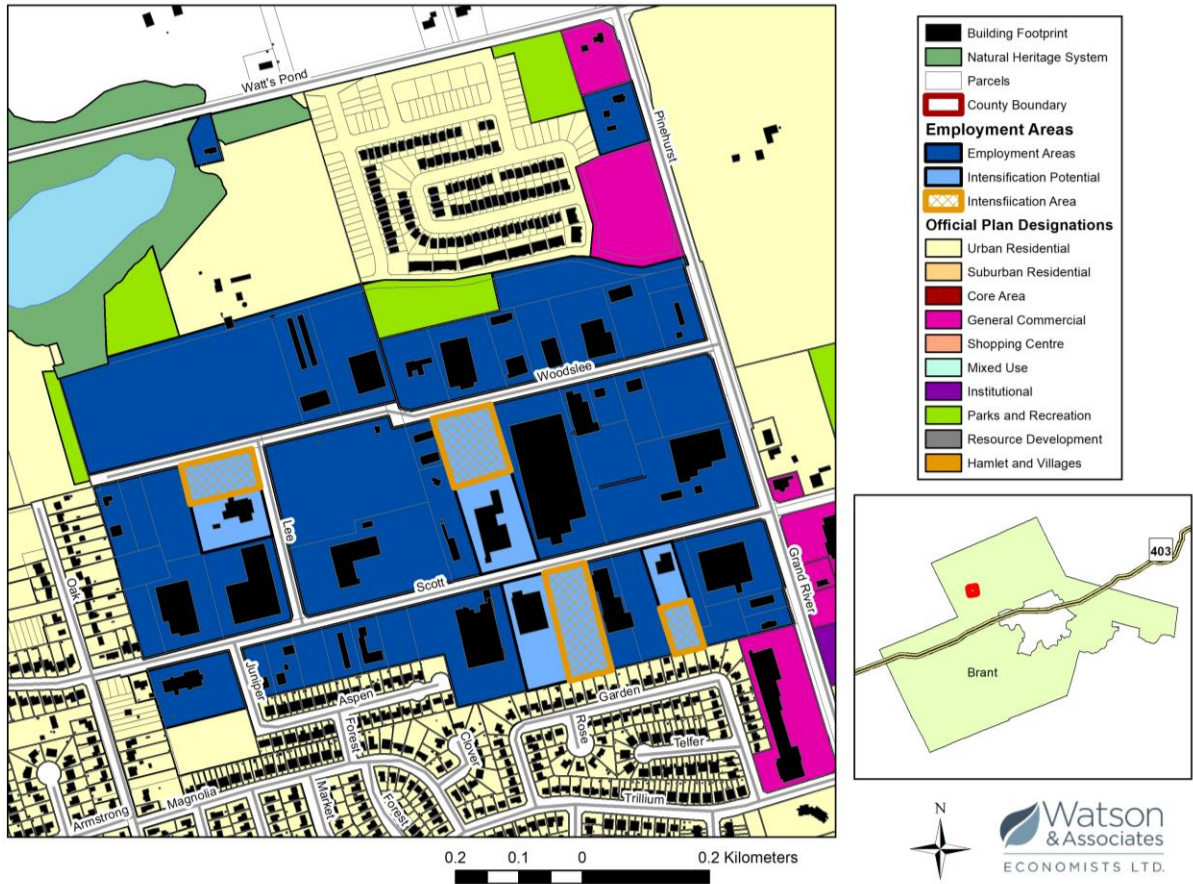
Forms of intensification could include the following:

- Expansion of an existing building;
- Subdividing of a parcel; and
- Redevelopment of a parcel with a higher yielding employment use.

Figures 6-55a through to 6-55d provide mapping of the parcels identified for intensification. Potential parcels are highlighted in light blue and overlaid is a potential intensification area within the parcel (identified by an orange crosshatch).



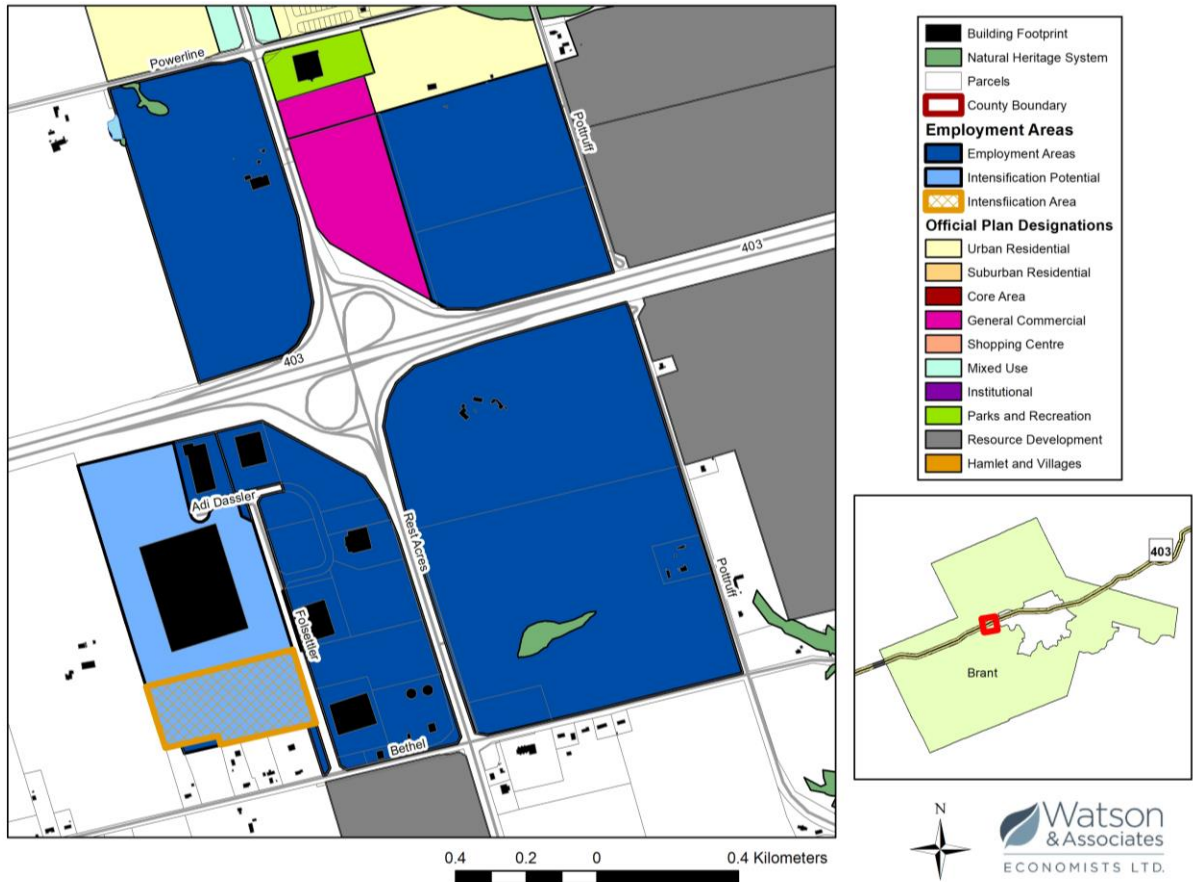
Figure 6-55a
 County of Brant
 Paris North Employment Area
 Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



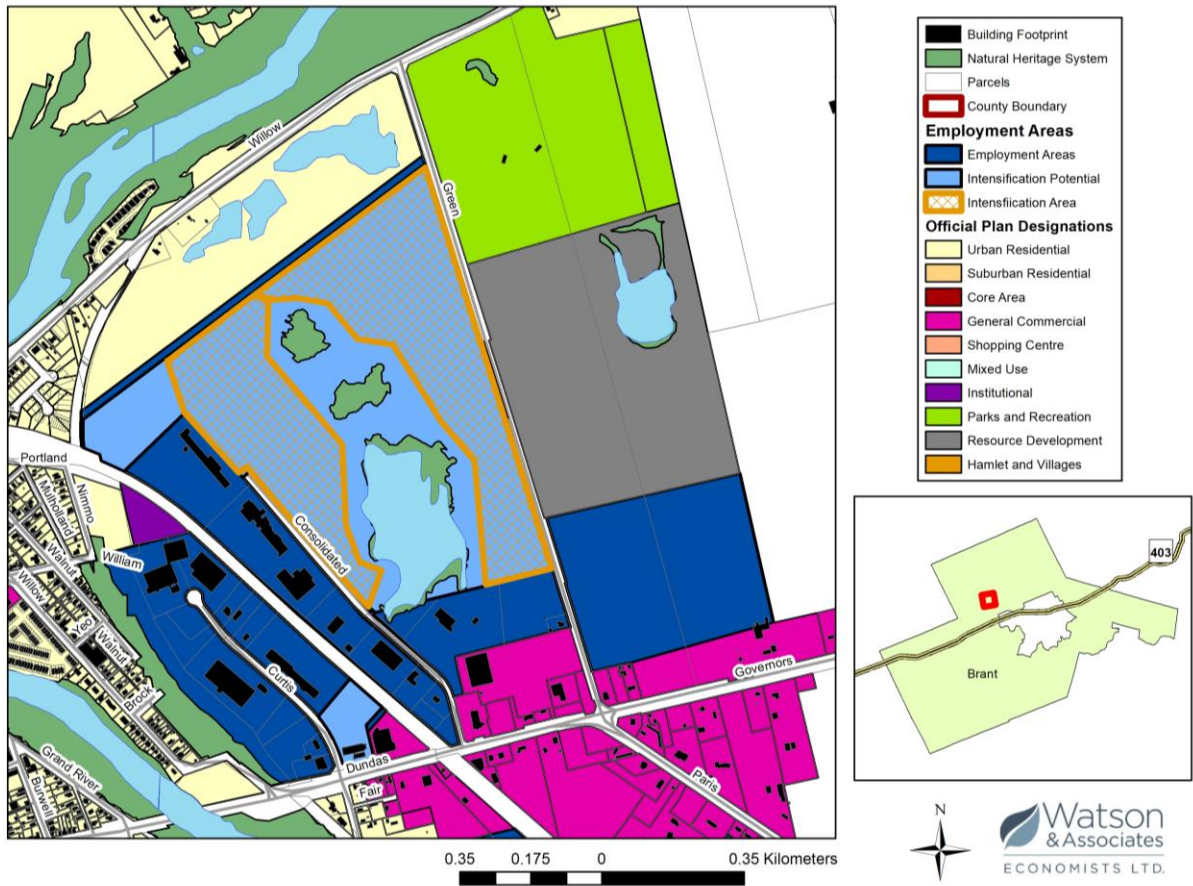
Figure 6-55b
County of Brant
Paris 403 Business Park
Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



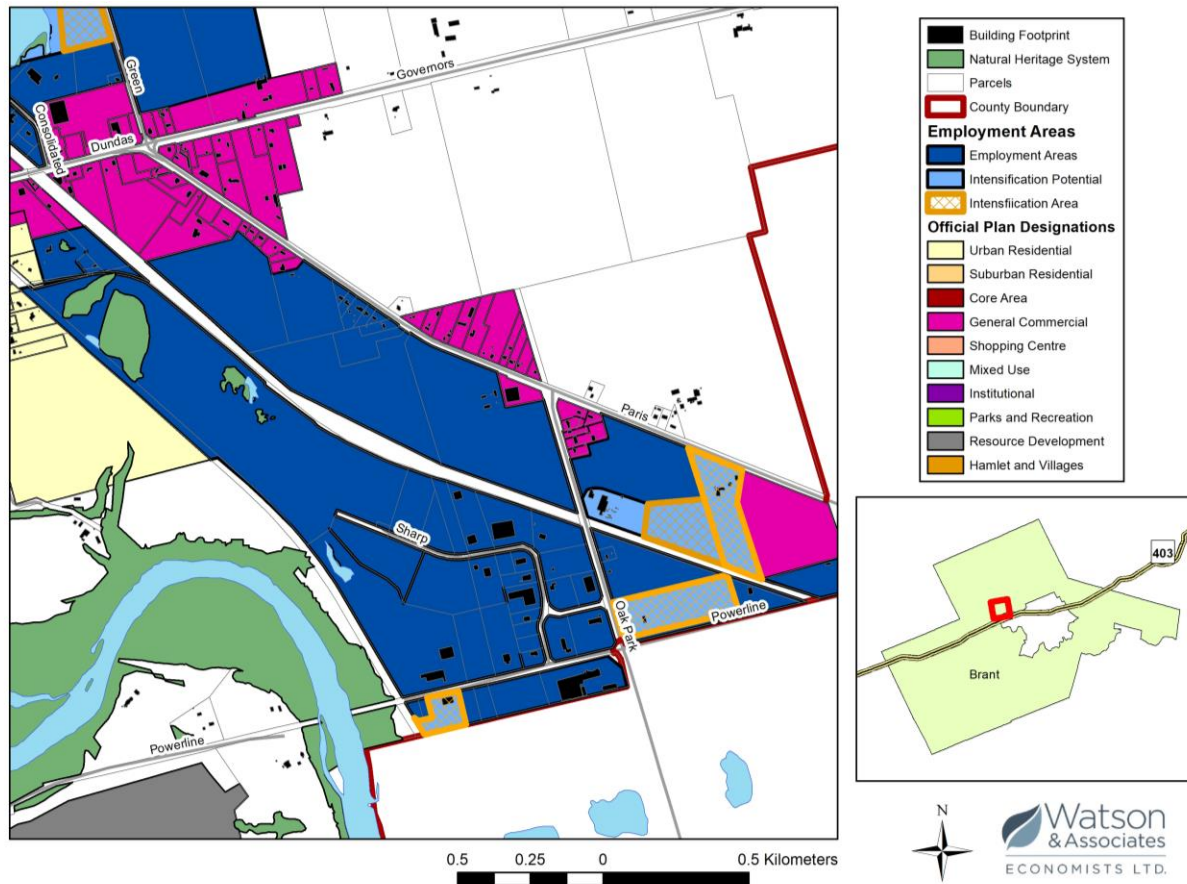
Figure 6-55c
County of Brant
Paris Southeast Employment Area – North Portion
Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Figure 6-55d
County of Brant
Paris Southeast Employment Area – South Portion
Intensification Potential



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

It is estimated that there is potential for intensification on approximately 70 ha of designated Employment Area land (areas identified in the mapping in the orange crosshatch). The Southeast Employment Area provides the greatest potential for development.

As summarized in Figure 6-56, approximately 37 ha or 53% of the intensification land area is applied to the land needs calculation over the forecast horizon. This assumption reduces the demand for development on vacant lands by 10% (i.e., 10% of land demand to be accommodated through intensification).



Figure 6-56
County of Brant
Urban Employment Area
Intensification Potential in Paris

Intensification Potential, ha	Paris
Intensification Potential Identified, ha	70
Intensification Applied to Demand, ha	37
Portion of Intensification Potential Applied to Demand (%)	53%

Source: Watson & Associates Economists Ltd.

6.10 Planning for Employment Areas

As previously mentioned, structural changes in the economy are modifying the character of economic activities in Employment Areas and impacting their built form and character. In recognizing these recent structural changes in the regional economy, there is a need for the City to ensure that the amount, type, and location of Brant's established and planned Employment Areas are well aligned with anticipated market demand. This requires that near-term (i.e., shovel-ready lands) and longer-term land needs are adequately addressed. It also requires that the County's Employment Areas be uniquely planned and designed to accommodate a range of traditional industrial sectors related to manufacturing, Goods Movement, construction, and utilities.

6.10.1 Planning for Industrial Sectors

A number of emerging industrial sectors are anticipated to influence the demand for employment lands in Brant across a wide range of uses. Advanced manufacturing is evolving and is requiring integrated operations on larger sites in a "campus-style" setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics, and on-site manufacturing.

As previously mentioned, the Goods Movement sector is evolving and responding to consumer demands, as e-commerce is growing in Canada. Emerging Goods Movement uses in Brant are anticipated to include warehousing facilities requiring specialized functions that focus on serving the expanding urban population within the local and surrounding area. Key requirements include improvements to accessibility to



the labour force, such as public transportation and buildings with a range of design options.

6.10.2 Planning for Goods Movement Sectors

As previously mentioned, recent industrial development activity across the G.T.H.A. and beyond has been driven by rising demand in the Goods Movement sector. Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas. Across North America, the Goods Movement industry is continuously evolving at a rapid pace. As previously mentioned, e-commerce and technological improvements represent the biggest drivers of change in the Goods Movement industry, driven by the rapid growth of mobile technology. Key considerations in planning for the Goods Movement sector include the following:

- Just-in-time manufacturing will continue to be the industry norm, placing increasing emphasis on more frequent and smaller deliveries by truck transport, typically during the last mile. As the e-commerce market continues to expand, this component of the supply chain is becoming increasingly important to businesses as it has a direct influence on the customer experience. In addition to the need to provide timely, accurate service delivery, it is also critical for the industry to ensure cost efficiency given that 30 per cent to over 50 per cent of total parcel delivery cost are associated with this leg of the supply chain.
- To overcome potential cost challenges, industries are acquiring properties in ideal urban locations and adaptively redeveloping existing buildings to create a new industrial product type: the urban warehouse. The features of the urban warehouse are as varied as the locations in which they are located, and often depend on the amount of goods being distributed. Unlike traditional fulfillment centers that grow horizontally, urban warehouses grow vertically with either high, clear heights or multi-level configurations that utilize complex automated material handling systems. By emphasizing volume of storage as opposed to area, high land prices can be spread across a greater storage capacity.
- Automation of distribution centres allows for more vertical storage; however, the need for numerous loading bays will dictate land requirements, and the industry



trend is for more and more bays at facilities. Using automated logistics solutions and robotic systems improves efficiency and reduces the requirement for daylight or height limits of warehouse space, thus allowing for more vertical storage. Vertical storage and increased automation also reduces the distance inside warehouses, further speeding up the delivery process.

- Autonomous trucking technology is currently being tested worldwide. A key driver of this technology is the reduction of transportation costs (i.e. labour) combined with improved road safety. Although the full implementation of driverless trucks remains far ahead in the future, advances in technology have come quicker than expected. Autonomous trucking technology is likely to affect industrial real estate in several ways. Lower transportation costs are anticipated to drive the need for fewer, but larger, consolidated warehouses in locations where land costs are lower. Typically, the larger the property, the lower the average employment density.
- Locations close to multi-modal facilities continue to be very attractive with access to rail – this is generating increased demand for larger-scale logistics hubs. Core components of integrated intermodal terminals, often referred to as freight hubs or freight villages, include general warehousing/storage, distribution centres, transshipment facilities, vehicle maintenance/repair services, and transportation/logistics uses.

6.10.3 Planning for Knowledge-Based Sectors

As previously noted, recent market demand on employment lands has been increasingly driven by growth in knowledge-based or creative class economies. As these sectors continue to grow, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming increasingly dominant built forms within Employment Areas.

Accommodating new development and expansions related to light industrial and office uses requires that Employment Areas are planned to achieve a compact, transit-supportive (e.g., connections to public transportation systems), and pedestrian-oriented environment with access to employment-supportive uses such as amenities, entertainment, cultural activities, and public spaces. At the same time, demand will continue to exist for industrial and commercial uses in prestige Employment Areas that offer ample land supply. For these Employment Areas, highway access and



exposure/visibility and design are critical, particularly for the corporate office component.

To address the broad needs of industry, a range of employment and commercial areas by site size, access, designation/zoning, and surrounding land use should be considered across a number of locations throughout Brant. In many cases, new major office/head offices accommodated in Employment Areas integrate industrial, office, and training facilities on site. Where feasible, prestige employment sites also provide significant land area to accommodate surface parking and, in some cases, future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than standalone major office developments. Given the unique operational requirements of these facilities, such uses often cannot be accommodated in downtown or mixed-use office settings. In industrial/business parks, prestige office uses are often positioned at gateway locations (i.e., at major highway interchanges) with direct highway access/exposure as well as strong connectivity to arterial roads, and offer live/work opportunities.

6.10.4 Planning for Employment-Supportive Uses

As industrial demand within the County's urban Employment Areas continues to increase for light industrial and knowledge-based uses, there will be increasing need to accommodate commercial service, retail and community/institutional uses. To varying degrees, ancillary uses such as restaurants, entertainment facilities and personal services (e.g. dry cleaners and service or repair shops) are permitted in Employment Areas with the intention to support and/or complement employment uses. Municipalities also typically accommodate select community/institutional uses such as recreation centres and emergency services facilities in Employment Areas. In some prestige Employment Areas, such uses are permitted in addition to core office and other stand-alone commercial uses such as hotels and convention centres.

Accommodating an adequate mix of supportive uses in Employment Areas, such as retail and personal services, can strengthen such areas by providing amenities and services to employees/employers. On the other hand, overly permissive policies related to employment-supportive uses, however, can lead to land-use conflicts (e.g. increased traffic congestion, safety, parking or off-site nuisances), competition with neighbouring commercial areas, upward influence on land values, fragmentation of the existing industrial land supply and/or erosion of Employment Areas.



When planning for Employment Areas, employment-supportive locations should be identified where services/amenities such as restaurants, personal services, medical offices and fitness centres can cluster together. The planning and development of these services/amenities in conjunction with the primary employment land uses helps improve the quality of life for employees by offering them access to services/amenities before or after work, or over lunch. In concert with this approach is the design of Employment Areas to be more pedestrian-, bicycle- and transit-friendly such that employees can easily access services/amenities, which helps to reduce the number and duration of trips via private automobile.

The inclusion of serviced commercial and employment-supportive uses relates to the desire to create more complete business parks or industrial areas, as well as to address transitional uses between industrial uses and adjacent Community Areas. Ultimately, the primary intention of employment-supportive uses in Employment Areas should be to serve the needs of employers and employees within the Employment Areas as opposed to the broader population. Though these uses are typically not land extensive, their inclusion in industrial areas could draw clientele from beyond the local area – particularly for services like health care, government, educational institutions or restaurants/drinking places – which could create unintended conflicts within the industrial area/business park. Accordingly, there is a balance needed in the accommodation of employment-supportive uses in Employment Areas, given the potential impacts these uses may have on the County.

6.10.5 Major Retail in Employment Areas

While non-industrial uses can directly support the function of Employment Areas, large freestanding retail uses can potentially create negative impacts on the surrounding industrial or employment uses, which in turn, may negatively impact the future prospects of an area for industrial development. Though large, freestanding, retail uses generate employment, they may also absorb large shares of land through their configuration or requirements (e.g., parking), draw considerable traffic from outside the immediate area (creating congestion in the industrial area), or affect the character of the Employment Area. As such, approaches should be developed to discourage major retail development in Employment Areas.



Under Growth Plan, 2019, employment land protection policies have been strengthened with respect to prohibiting uses such as major retail in Employment Areas. As a result, Growth Plan provides that, for any major retail uses that are permitted in Employment Areas, a municipality should establish a size or scale threshold for such use. The definition of major retail is not specified in Growth Plan or the P.P.S., 2020, as such restrictions for retail on employment lands vary across the G.G.H.

6.11 Urban Employment Area Land Needs to 2051

6.11.1 Urban Employment Area Land Demand to 2051

Over the forecast horizon, demand for Employment Area land is approximately 331 ha (11 ha annually) in Paris and 53 ha (2 ha annually) in St. George. As previously discussed, it is assumed that 10% of the Employment Area land demand in Paris will be accommodated on existing Employment Area sites through intensification. While a density of 14 jobs/ha is applied to new Employment Area lands, it is important to note that including the intensification adjustment, the overall Employment Area density for Paris would increase to 15 jobs/ha by 2051, as summarized in Figure 6-59. Figures 6-57 (Paris) and 6-58 (St. George) provide further details on the Employment Area land demand forecast to 2051.

Figure 6-57
County of Brant
Paris Urban Employment Area
Urban Employment Land Demand to 2051

Paris Employment Areas	Employment	Density (jobs/ha)	Land Area (ha)	Demand Adjusted for Intensification, ha	Annual Land Absorption, ha
Employment Land Employment (E.L.E.)	4,150	12	346	311	10
Population-Related Employment (P.R.E.)	975	45	22	16	1
Total Employment Area	5,125	14	368	331	11

Notes: May not add up precisely due to rounding. Intensification adjustment is 37 ha (Figure 6-56)

Source: Watson & Associates Economist Ltd.



Figure 6-58
County of Brant
St. George Urban Employment Area
Urban Employment Land Demand to 2051

St. George Employment Area	Employment	Density (jobs/ha)	Land Area (ha)	Demand Adjusted for Intensification, ha	Annual Land Absorption, ha
Employment Land Employment (E.L.E.)	540	11	51	51	2
Population-Related Employment (P.R.E.)	60	40	2	2	0
Total Employment Area	600	12	53	53	2

Notes: No intensification demand has been identified for St. George given that the Employment Area is water only servicing. May not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure 6-59
County of Brant
Urban Employment Area Density at 2051

	Paris Employment Areas	St. George Employment Area
Employment, 2021 (A)	4,700	560
Land Area, 2021 (B)	339	49
Density (jobs/ha) (C = A / B)	14	11
Employment, 2021 to 2051 (D)	5,100	600
Land Area, 2021 to 2051 (E)	368	53
Density (jobs/ha) (F = D / E)	14	11
Land Area, 2021 to 2051, Adjusted for Intensification (Paris, G = E x 10% = 37 ha adjustment)	331	53
Employment, 2051 (F = A + D)	9,800	1,160
Land Area, 2051 (G = B + E)	670	102
Density (jobs/ha) (H = F / G)	15	12

Source: Watson & Associates Economists Ltd.

6.11.2 Urban Employment Area Land Needs to 2051

As summarized in Figure 6-60, comparing Urban Employment Area demand in Paris against the current vacant land supply generates an Employment Area shortfall of approximately 110 gross ha. In contrast, a small Employment Area surplus of 5 ha has been identified in St. George. Overall, the need for an additional 105 ha of Employment Area land has been identified to accommodate forecast demand to the year 2051.

Figure 6-60
County of Brant
Urban Employment Area Land Needs to 2051

Urban Employment Area Land Needs	Paris	St. George	Paris & St. George
Employment Area Land Supply (adjusted), ha	221	58	280
Employment Area Land Demand, ha	331	53	384
Employment Land Needs, Shortfall, ha	(110)	5	(105)

Source: Watson & Associates Economists Ltd.



6.12 Observations

The long-term economic outlook for the County is very positive. As previously noted, as the local employment base and economy within the surrounding commuter-shed continues to grow, the County of Brant will continue to be a desirable location for workers to live, leading to steady population and P.R.E. growth across the County.

Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated in neighbouring municipalities within the G.G.H. Outer Ring. As such, raising the economic profile of the County of Brant by leveraging the economic opportunities and strengths of the broader G.G.H. regional economy will continue to be a key long-term economic development objective for the County of Brant. Achieving the County-wide employment forecast and allocations by settlement area (Paris and St. George) will also require significant investment and effort on behalf of both the public and private sector to attract and accommodate new employers and facilitate the expansion of existing businesses across a broad range of established and emerging employment sectors.

As previously noted, the County's competitive economic position is highly tied to its ability to attract and accommodate a growing skilled and unskilled labour force pool. To ensure that economic growth is not constrained by future labour shortages, effort will be required by the County of Brant and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

The County of Brant has a surplus of approximately 49 ha of designated urban commercial lands to accommodate the commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.

The County has a shortfall of designated Urban Employment Area lands of approximately 105 gross ha. The shortfall within Paris is approximately 110 ha, as St.



George has a small surplus of 5 gross ha. The County should explore options to add additional Urban Employment Areas, including expanding the settlement area boundary in Paris to accommodate additional Employment Area lands in the Paris 403 Business Park.



Chapter 7

Employment Area Conversions Review



7. Employment Area Conversions Review

7.1 What is an Employment Area Conversion?

Changes to the designation of a site designated in the County's O.P. as "Employment" to allow for uses not permitted for that designation, including residential, mixed-use and specific commercial uses, is considered an Employment Area land conversion. The conversion of Employment Area lands generally occurs during the M.C.R. process as there is a need to understand the broader impacts of the conversion under the policy framework of the Growth Plan, 2019 and the P.P.S., 2020, as well as local site-specific considerations. As part of this M.C.R., Employment Area conversion requests have been reviewed and evaluated.¹ Based on this review, a series of recommendations have been made with respect to a number of sites within the Urban and Rural Employment Areas where conversion requests have been submitted.

7.2 Policy Context

The Growth Plan, 2019 and the P.P.S, 2020 provide a framework for assessing the conversion of lands within Employment Areas. The following briefly summarizes the Growth Plan, 2019 policies in regard to Employment Area conversions (Policies 2.2.5.9 and 2.2.5.10).

Within an M.C.R.:

- Conversions of Employment Areas to non-employment uses may be permitted only through an M.C.R., where it is demonstrated that:
 - there is a need for the conversion;
 - the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
 - the municipality will maintain sufficient employment lands to accommodate forecast employment growth to the horizon of this Plan;
 - the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan; and

¹ Refer to sections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.



- there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.

Outside an M.C.R.:

- Lands within an existing Employment Area may be converted to non-employment uses outside a municipally initiated M.C.R. (until the next M.C.R.) where certain criterion can be met:
 - there is a need for the conversion;
 - the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan;
 - there are existing or planned infrastructure and public service facilities to accommodate the proposed uses;
 - the conversion must maintain a “significant number” of jobs on the subject lands through the establishment of a development criteria; and
 - the site must not be a part of a provincially significant employment zone (P.S.E.Z).

Subsection 2.2.5.11 of the Growth Plan, 2019 further states that any change to an O.P. to permit new or expanded opportunities for major retail in an Employment Area may only occur in accordance with Policy 2.2.5.9 or Policy 2.2.5.10, as previously summarized as the criteria for the M.C.R.

7.3 Approach

As part of its M.C.R. process, the County of Brant invited landowners to submit requests for properties that are currently designated for employment to be converted to permit non-employment uses. Submissions were due to the County by December 31, 2020. All requests have been reviewed and evaluated against the County's developed criteria for conversion considerations, which is based on provincial policies and County of Brant objectives. As indicated to landowners, there is no guarantee that requests will result in a staff recommendation and/or Council's decision to convert employment lands to non-employment uses.

In total, the County has received six formal submissions to convert specific Employment Area sites to non-employment uses, which comprise 107 ha of designated, vacant



Employment Area land. These lands have been evaluated based on the provincial framework, as well as a set of local criteria and principles drawing on the following:

- A review of best practices across the G.G.H.;
- Relevant provincial planning policies and supporting documents related to the Growth Plan, 2019 and the P.P.S., 2020; and
- The evolving nature of Employment Areas within the County of Brant with respect to land use, economy and transportation.

A series of local planning principles, listed below, have been established as part of the evaluation of Employment Area land conversions. These principles are meant to provide further rationale to guide the local employment conversion criteria. Again, it is noted that these principles were developed using policy directions and guidance from the P.P.S., 2020, the Growth Plan, 2019, as well as reference to best practices in protecting, planning, and developing employment lands.

1) Provide specifically designated Employment Area opportunities to establish themselves and their viability.

There are specific designated Employment Areas that have previously been designated through an exercise which resulted in Council approval (e.g., Council approved O.P.A., Secondary Plan, etc.) and because of externalities such as planning appeals, development agreements, funding agreements, municipal servicing, etc., they have not yet established their marketability, viability, and/or presence. A conversion request within these specific designated Employment Areas would be premature and potentially provide a barrier to the implementation of the Employment Area.

2) Protect Employment Areas in proximity to major transportation corridors and Goods Movement infrastructure to ensure businesses have access to a transportation network that safely and efficiently moves goods and services.

In contrast to other urban land uses (e.g., commercial, mixed-use and residential areas), Employment Areas provide the opportunity to accommodate industrial sectors that cannot be easily accommodated in other areas of the County. The Growth Plan, 2019 and the P.P.S., 2020 contain policies that protect Employment Areas in proximity to major Goods Movement facilities and corridors which require those locations. To continue to be competitive and attractive to a broad range of industrial and commercial



sectors, municipalities need to ensure that medium- to large-scale vacant sites have good access to trade corridors near major highway interchanges as well as other major Goods Movement and transportation facilities such as ports, rail yards, intermodal facilities, and airports.

3) The configuration, location, and contiguous nature of Employment Areas need to be maintained in order to prevent fragmentation and provide business-supportive environments.

Preserving the overall configuration, location, and contiguous nature of Employment Areas ensures the County can continue to be competitive and attractive to a broad range of industrial and commercial sectors. Potential risks of Employment Areas becoming fragmented over time are to be mitigated. Encouraging contiguous Employment Areas of critical mass supports market choice and municipal competitiveness, while also enabling businesses to establish relationships and synergies, thereby developing strong business-supportive environments to various scales (i.e., locally and regionally).

4) Provide a variety of Employment Area lands in order to improve market supply potential and regional attractiveness to a variety of employment sectors and business sizes.

Municipalities need to ensure a sufficient supply of municipally serviced (and/or serviceable) lands within Employment Areas, by location, access, site size, zoning, tenure, etc., are offered. This will ensure a sufficient market choice of designated Employment Areas is provided to accommodate a variety of employment sectors and business sizes. The County will need to ensure that it offers a diverse supply of employment land supply, including a range of parcel sizes.

5) Retain the employment and job potential of Employment Areas.

Recommended Employment Area conversion should maintain or improve the County's overall ratio of jobs to population (i.e., employment activity rate), without undermining the functionality and competitive position of existing Employment Areas.

6) Support efforts of transformative change in Brownfield Areas if it can be demonstrated that the site offers characteristics that support residential intensification and higher-density mixed-use development.



It is recognized that over time large abandoned industrial sites, i.e., brownfield sites, may provide opportunities for transformative change over the long term. Efforts that encourage transformative change on brownfield sites should be supported when it can be demonstrated that the employment conversion request supports residential intensification and higher-density mixed-use development (i.e., intensification node or corridor) as set out under the provincial and local Employment Area conversion framework described herein.

7) Align with County interests and policies related to Employment Areas in order to support achieving municipal goals and mandates of planning for, protecting, and preserving Employment Areas.

It is recognized that there are various municipal interests and policies related to Employment Areas that speak to planning for, protecting, and preserving Employment Areas. As such, the purpose of this principle is to align as best as possible to County mandates, goals, and objectives, for example, included in the County's Strategic Plan, O.P., Secondary Plans, etc., which provide insight related to the County's vision towards planning for, protecting, and preserving Employment Areas.

8) Limit and/or mitigate land-use incompatibilities where necessary.

The Growth Plan, 2019 and the P.P.S., 2020 contain policies that speak to avoiding or limiting land-use incompatibilities with sensitive land uses (e.g., residential uses, education and health care facilities, day care centres). Employment Areas may also accommodate industries that require adequate separation from sensitive land uses.

7.3.1 Localized Criteria Evaluation

As part of this M.C.R., a list of localized criteria was prepared to assess in evaluating Employment Area land conversions. Appendix K provides details of the localized criteria. The localized criteria consider the location, surrounding uses and compatibility of proposed conversion, quality of the site as an Employment Area, impact on the overall employment land supply, and municipal interests.

The following provides a summary of the criteria prepared:

- The site is in proximity and has access to major transportation corridors (e.g., highways, rail, cross-jurisdictional connections);



- The site is located outside or on the fringe of an assembly of an Employment Area;
- The site offers limited market supply potential for Employment Areas due to a range of issues (site configuration, size, access, physical conditions and servicing constraints, etc.);
- The proposed conversion to non-employment uses is compatible within surrounding land uses/and or could be mitigated from potential land-use conflicts;
- The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites;
- The conversion request is supporting the long-term prosperity of the County through redevelopment of a brownfield site that is no longer viable for Employment Area purposes. This site would retain the employment and job potential of the Employment Area;
- The conversion of the site to non-employment uses would not conflict with municipal interests and policies; and
- The conversion of the site would not cause cross-jurisdictional issues that cannot be overcome.

7.4 Employment Area Conversion Requests Reviewed

Figure 7-1 summarizes the Employment Area land conversion requests received and reviewed as part of this M.C.R. In total, six sites were reviewed (four site areas) representing approximately 107 vacant ha. Each of the submissions reviewed seek a land-use redesignation from Employment Area to Urban Community Area (i.e., residential and/or mixed use), within Paris and St. George. As previously discussed in Chapter 5, there is a significant surplus of Urban Community Area land, totalling 395 gross ha, in the County's D.G.A. lands within Paris and St. George. In addition, as discussed in Chapter 5, the B.U.A. offers an intensification potential to support a wide-range of housing options, including at-grade housing. Furthermore, as discussed in Chapter 6, the County has a shortfall of Employment Area land of 105 ha. As such, it is important to note any Employment Area conversion to a non-employment use will exacerbate this shortfall. Given the sufficiency of the County's potential long-term housing supply in both greenfield and intensification areas, there is not a demonstrated need to create additional Community Area land through the conversion of the County's Employment Areas.



Notwithstanding the sufficiency of the County’s Community Area land supply, it is important that all vacant lands which form part of the County’s Employment Area inventory are available, serviceable and marketable over the long-term planning horizon. If it is determined that a site is not feasible for Employment Area land development and the conversion of such a site supports the County’s local planning principles, such lands will be considered for conversion regardless of long-term Community Area land need.

Figure 7-1
County of Brant
Conversion Request Sites Reviewed

Site	Site Location	Employment Area	Land Area, ha	Conversion Request
Site 1	67 Woodslee Ave.	Paris North Employment	4.2 ha	Mixed-Use Development
Site 2	326 Grand River St.	Paris North Employment	3.0 ha	Mixed-Use Commercial Development
Site 3a/ Site 3b	Sharp Rd.	Paris Southeast Employment Area	16.0 ha (approx.)	Urban Residential
Site 4a/ Site 4b	95 Old Onondaga Rd./North of 366 County Rd. 18	Cainsville Employment Area	84.0 ha	Urban Residential
Total County of Brant			107 ha	

Source: Watson & Associates Economists Ltd.

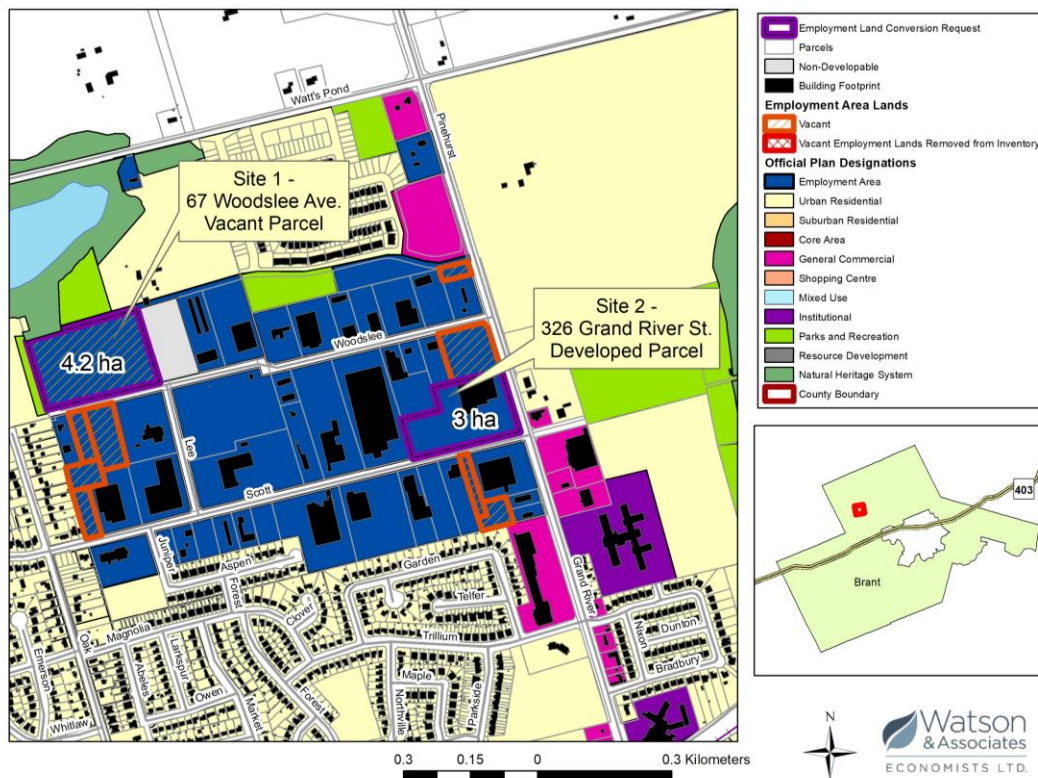
7.4.1 Paris North Employment Area

As identified in Figure 7-2, there are two Employment Area land site conversion requests in the Paris North Employment Area. As discussed in Chapter 6, the Paris North Employment Area is a mature Employment Area with only 10 ha of vacant Employment Area land remaining. The Employment Area accommodates a range of businesses, primarily small and medium-sized businesses. A large parcel at the centre of the Employment Area is a County recreational site with soccer fields (Woodslee Avenue/Lee Road, SE). All occupied and vacant parcels are less than 5 ha in size. The Employment Area is adjacent to a large commercial corridor in Paris (Grand River



St. N.), to the east. Other surrounding uses include residential and parkland. The Employment Area provides the opportunity to accommodate E.L.E. that does not require large sites or prestige industrial location requirements, such as access to highway.

Figure 7-2
County of Brant
Paris North Employment Area
Employment Area Land Conversion Requests



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

Site 1 – 67 Woodslee Avenue

These lands are part of the Northwest Paris Area Study which was approved by County Council in 2012; the preferred concept on the lands had a mix of residential, commercial and employment. The lands were recently identified as surplus to the water tower and conveyed to Pinevest Homes (Woodslee) Inc. The lands had been utilized for agricultural purposes for the past several years and there are no structures. Recently they have been utilized for topsoil storage for the Brookfield development located to the



north of the lands. The site is currently vacant and is located adjacent to the County water tower directly to the east. To the south of the site are employment lands, consisting of both occupied and vacant lands. Residential and parkland uses are located to the north and west of the site.

Additional lands owned by the County and adjacent to the water tower were not included in the recent sale. It is acknowledged that affordable housing and the delivery of such housing play prominent roles to ensure that the availability of the opportunity is evaluated in future development applications.

Given the historical context of the above, however, the M.C.R. recommends that the County should retain this site as Employment Area land, as this site is among the largest in the Paris North Employment Area. The Paris North Employment Area has a limited supply of vacant employment land, and this Employment Area is important in contributing towards a range of Employment Area options for the County over the long-term planning horizon.

It is recommended that the site remain as an Employment Area for the following reasons:

- There is no demonstrated need for additional Community Area lands within the County, and the subject lands are required for Employment Area use over the long term;
- The site has market potential for a medium-sized employment use, or could be subdivided to accommodate a number of smaller-scale developments (it is encouraged that the County maintain its supply of serviced or serviceable vacant employment land parcels that are medium to large in size);
- It is located within an established Employment Area (i.e., not located on the fringe, fragmented, or outside an Employment Area). Conversion of the site would potentially undermine the planned function of the area by risking further erosion of the Employment Area through subsequent conversion requests; and
- The conversion to non-employment uses is generally not compatible with the surrounding land uses in the Employment Area, particularly the occupied and vacant Employment Area lands located directly to the south.



Site 2 – 326 Grand River St. N.

The applicant is seeking a conversion of this site to allow for a broader range of commercial uses in order to market the lands to a wider range of users. The site is developed; however, it is underutilized with a large portion of the parcel undeveloped. Current uses include a multi-tenant industrial building with industrial and commercial uses as permitted in the O.P. The site is adjacent to other Employment Area uses to the west and to the south. To the north is an undeveloped vacant parcel currently used for trailer parking. To the southeast is a veterinary clinic and the Sobeys Plaza.

It is recommended that the County retain this site as Employment Area land; however, consideration should be given to broadening the range of land uses permitted on this site to include uses that would allow for additional commercial uses. Notwithstanding, this consideration for a broader range of land uses, it is recommended that sensitive commercial and institutional uses, including major retail and places of worship, not be permitted on this site or within the surrounding area.

The Community Corridor Designation includes areas of the County of Brant that bound neighbourhoods and employment areas, providing a transportation corridor and a mix of amenities to nearby residents and workers. Often located along arterial or collector roads, these corridors connect community nodes and act as a linear focus for mixed-use development, intensification, high standards of urban design, the efficient transportation of goods, and a shared space between automobiles, public transit, and active transportation modes.

7.4.2 Paris Southeast Employment Area

The Paris Southeast Employment Area is a mature Employment Area located along, Dundas Street, a major arterial road within the County. The Employment Area is located within 1 km of Highway 403. The Employment Area includes a range of heavy and light industrial uses, including several of the County's largest employers. Heavy industrial uses are located primarily in the northern portion of the Employment Area, north of Dundas Street. A commercial corridor breaks the Employment Area into two areas. The proposed conversion site is situated in the southern portion of the Employment Area, south of Dundas Street. Located directly to the south of the Employment Area, south of the Alexander Graham Bell Parkway (Highway 403) at the Oak Park Road interchange, is the City of Brantford Northwest Industrial Park. The



Paris Southeast Employment Area has approximately 107 ha of vacant employment land. The Employment Area offers an opportunity to accommodate a wide range of industrial uses, including General and Prestige Uses.

Site 3a and 3b – Sharp Road

The applicants of these sites are seeking a conversion on two parcels totalling 16 ha, to accommodate urban residential uses. As identified in Figure 7-3, the large parcel, Site 3b, is proposed to be subdivided and the southern portion is to remain an Employment Area. To the west of the site are undeveloped lands designated Urban Residential which are planned to be a part of a broader residential development that would include the proposed conversion site. To the east and south of the site are vacant Employment Area lands. To the north is the Dundas Street Commercial Corridor.

The applicant had discussed the process associated with the conversion of the lands and the broader development of the area for some time with County staff. The proposed O.P.A. gives consideration to the broader planning area to establish a comprehensive approach to land uses that would generally be similar to considerations in an area study. The lands were previously owned by the County and purchased by Telephone City Aggregates Ltd. (TCA) as they were not determined as a priority for employment lands for the County of Brant. The lands are not located in a high priority area, such as Rest Acres Road and Highway 403, and as a result were sold by the County. On that basis, the applicant is making the request to change the land use for the purposes of future mixed-use development.

The applicant has also been working in corporation with adjacent landowners as it relates to the potential land uses and consideration of a new road network for the area. The new road network proposes a roundabout at Dundas Street/Willow Street/Willis Avenue as a means to improve traffic movement through the area. The purposed road network also provides the opportunity of maintaining Curtis Avenue in its current condition as access for existing homes.

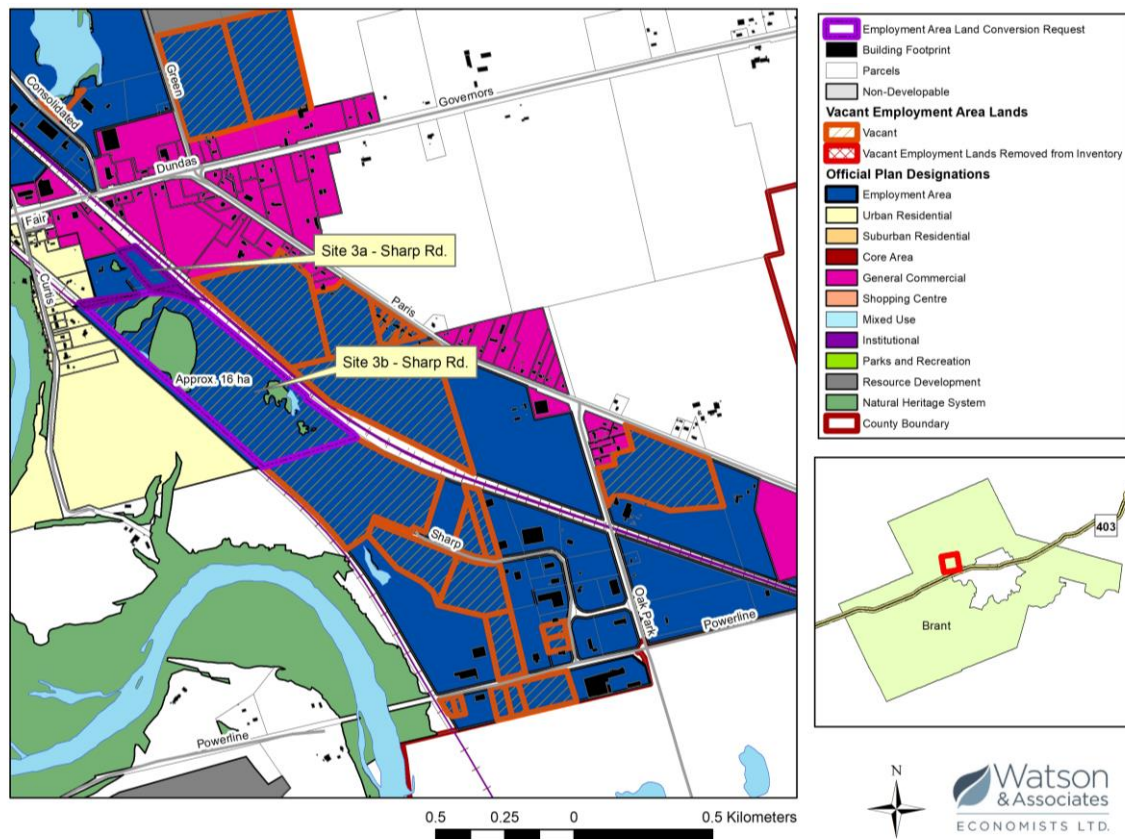
It is recommended that these sites remain as an Employment Area for the following reasons:

- There is no demonstrated need for additional Community Area lands within the County, and the subject lands are required for Employment Area use over the long term;



- The site has market potential to accommodate a large-scale employment use, or could be subdivided to accommodate a number of medium- to small-scale developments (it is encouraged that the County maintain its supply of serviced or serviceable vacant employment land parcels that are medium to large in size);
- It is located within an established Employment Area (i.e., not located on the fringe, fragmented, or outside an Employment Area). Conversion of the site would potentially undermine the planned function of the area by risking further erosion of the Employment Area through subsequent conversion requests; and
- The conversion to non-employment uses is generally not compatible with the surrounding land uses in the Employment Area, particularly the occupied and vacant Employment Area lands located directly to the south.

Figure 7-3
County of Brant
Paris Southeast Employment Area
Employment Area Land Conversion Requests



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



7.4.3 Cainsville Employment Area

The Cainsville Employment Area is a large Employment Area within the Rural System. Cainsville has a very small residential component, primarily a strip of rural residential lots along the Grand River and Blossom Road. The remaining area of Cainsville is primarily comprised of general industrial sites within a low building coverage (i.e., ratio of building space to land area) that provides space for permitted outside storage. Industrial uses primarily include businesses in construction, warehousing/logistics as well as some manufacturing. The Employment Area has existing servicing constraints; however, municipal servicing options for this area are currently under review with the City of Brantford as part of the County's annexation agreement with the City of Brantford. It is noted that this municipal servicing agreement with the City of Brantford does not allow for residential development, as per the Boundary Adjustment Agreement, 2016. This agreement will not be up for consideration to be re-negotiated.

Site 4a and 4b – 95 Old Onondaga Rd./ N. of 366 Count Road 18

As illustrated in Figure 7-4, there are two sites under review, Site 4a and Site 4b. These sites form the southern portion of the Cainsville Employment Area and are undeveloped. The applicant is requesting the conversion of 84 ha of Employment Area lands to Urban Residential use. Based on a review of the site, it is recommended the site remain as Employment Area for the following reasons:

- There is no demonstrated need for additional Community Area lands within the County, and the subject lands are required for Employment Area use over the long term;
- The site represents a significant component of the County's vacant employment land supply. The site has market potential to accommodate a large-scale employment use, or could be subdivided to accommodate a number of medium- to small-scale developments (it is encouraged that the County maintain its supply of serviced or serviceable vacant employment land parcels that are medium to large in size);
- It is located within an established Employment Area (i.e., not located on the fringe, fragmented, or outside an Employment Area). Conversion of the site would potentially undermine the planned function of the existing Employment Area located directly to the north by creating potential land-use incompatibilities



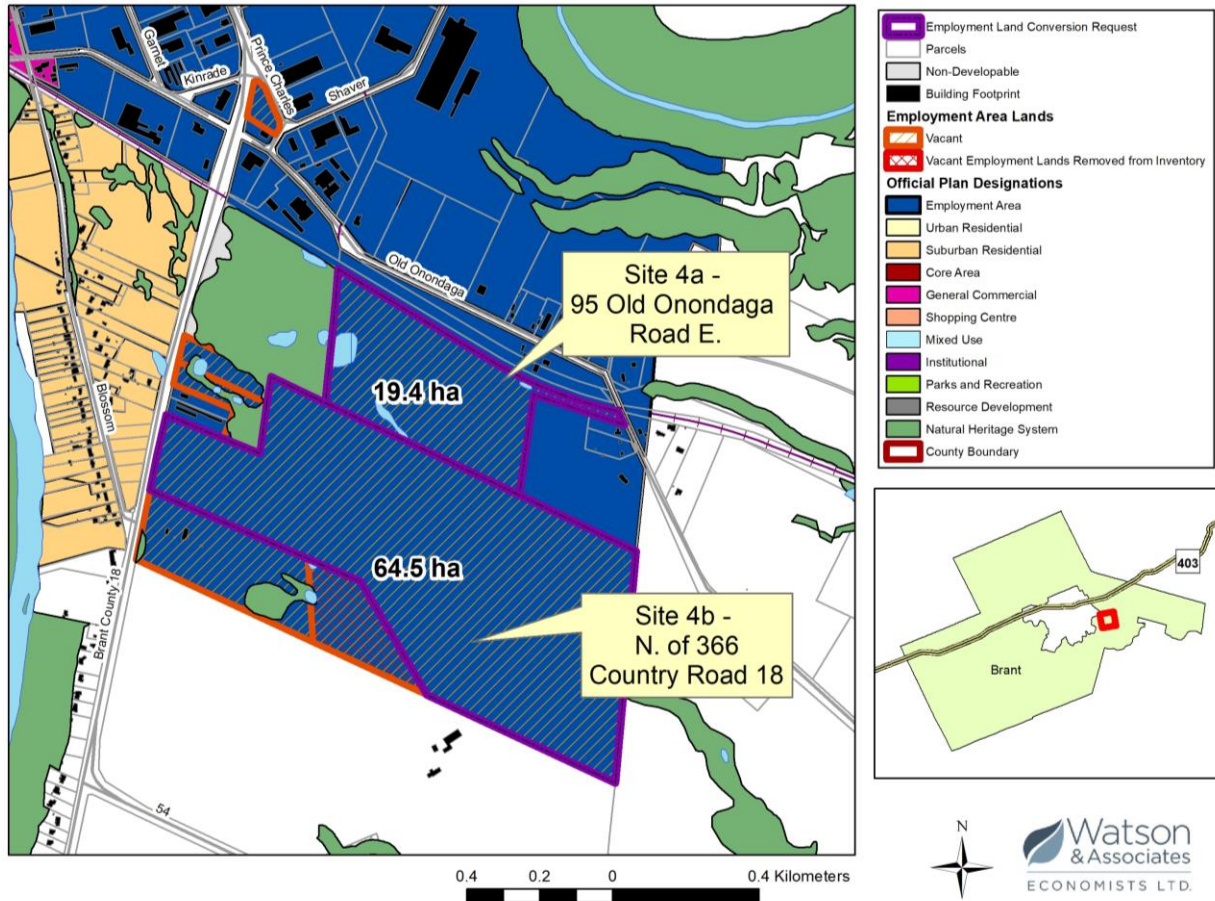
and/or risking further erosion of the Employment Area through subsequent conversion requests;

- The site is located in proximity to major transportation corridors (e.g., arterial roads and highways);
- In accordance with Growth Plan policy 2.2.5.9 (e), there are no existing or planned infrastructure and public service facilities to accommodate the proposed uses (e.g., libraries, schools, retail, and indoor/outdoor recreation); and
- The conversion of this site to Community Area is not supported by the City of Brantford/Brant County Municipal Servicing Agreement.

It is further recommended that the County consider the preparation of a Secondary Plan for this Employment Area to more clearly define the long-term vision for this area and identify potential land uses and target sectors. Such a study would help ensure that this Employment Area is planned to achieve its maximum potential as a fully municipal-serviced Employment Area over the long term.



Figure 7-4
County of Brant
Cainsville Employment Area
Employment Area Land Conversion Requests



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

7.5 Recommendations

It is recommended that all sites requested for conversion remain Employment Areas. A conversion request site evaluation has been completed for each Employment Area and is provided in Appendix K.



Chapter 8

Settlement Boundary Area Expansion Assessment for Employment Areas



8. Settlement Area Boundary Expansion Assessment for Employment Areas

8.1 Introduction

8.1.1 What is a Settlement Area Boundary Expansion (S.A.B.E.)?

A settlement boundary is a delineated area in the County's O.P. for each settlement area. To expand an existing settlement area, an adjustment to the settlement boundary is required. Any adjustments to the settlement boundary need to be updated in the County's O.P. as part of the M.C.R. In accordance with the Growth Plan, 2019, a small settlement area boundary expansion (S.A.B.E.) of 40 hectares or less can occur outside an M.C.R., as previously discussed in Chapter 2. Ultimately, a S.A.B.E. requires the completion of an assessment, including supporting studies, which will be reviewed by the Province as part of the M.C.R.

8.1.2 Policy Context

The Growth Plan, 2019 provides direction for where and when S.A.B.E.s are permitted. This includes policies directing expansions to areas with sufficient planned or existing infrastructure and public service facility capacity to bring lands within the Urban System. S.A.B.E.s should avoid Prime Agricultural Areas and the Natural Heritage System where possible in both the Urban and Rural Systems.

The approach in assessing a S.A.B.E. for the Urban System and Rural System differs. Generally, the Growth Plan, 2019 requires only minor S.A.B.E. requests within the Rural System which includes rounding out existing residential developments and expansions for Rural Employment Area for existing businesses. Within the Urban System, the Growth Plan, 2019 requires a S.A.B.E. be based on a detailed assessment once it has been established that there is a need such an expansion.¹ According to the P.P.S., 2020, the level of detail of the S.A.B.E. assessment should correspond with the

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.8 and Policy 2.2.9, pp. 25 to 27.



complexity and scale of the S.A.B.E. or development proposal.¹ Further details on the policy requirements for Urban and Rural S.A.B.E.s are provided below.

8.1.2.1 Urban S.A.B.E.

According to the Growth Plan, 2019, a S.A.B.E. for additional lands within the Urban System needs to be justified through an L.N.A. Once a need has been established, the S.A.B.E. is then reviewed based on the feasibility of the proposed expansion, and the most appropriate location for the proposed expansion will be identified based on the comprehensive application of the policies of the Growth Plan, including the following:

- Sufficient opportunities to accommodate growth are provided (i.e., land configuration supports an optimal net developable area and ratio);
- Adjacent land uses are compatible;
- Infrastructure in the area is available, planned or can be provided;
- Expansion near key hydrologic areas and environmental features is avoided where possible;
- Agriculture assessment if on prime agriculture lands is conducted; and
- There is compliance with minimum distance separation (M.D.S.) formulae if in proximity to agriculture operations.²

8.1.2.2 Rural S.A.B.E.

Rural S.A.B.E. requirements for residential lands are limited to minor rounding of existing residential development and hamlet boundaries. An adjustment to the boundary of hamlets for residential development requires a site-specific review based on planning rationale. Similar to the urban S.A.B.E., a rural S.A.B.E. also requires an agricultural assessment if on prime agriculture lands and compliance with M.D.S. formulae if in proximity to agriculture operations.

According to the Growth Plan, 2019, expansions to existing Rural Employment Areas may be permitted only if necessary to support the immediate needs of existing businesses and if compatible with the surrounding uses.³ S.A.B.E. requests for Rural

¹ Provincial Policy Statement, 2020, Policy 1.1.3.8, p. 10.

² A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9.3, p. 25.

³ Ibid., Policy 2.2.9., pp. 27 and 28.



Employment Areas are generally only permitted for existing Rural Employment Areas and for existing businesses. Development in the Rural Area is permitted for:

- Management or use of resources;
- Resource-based recreational uses; and
- Other land uses that are compatible with the rural landscape and are not appropriate for the urban settlement area.¹

8.1.3 County S.A.B.E. Requests Received

The County received many S.A.B.E. requests from landowners to accommodate additional Urban Employment Area, Rural Employment Area, Urban Community Area (residential lands) and Secondary Settlement Areas and Hamlets, for both residential and employment lands to be added to the settlement areas.

Based on the results of the L.N.A., the County does not require additional lands to accommodate Urban Community Area growth (for residential and population-related employment). Accordingly, no S.A.B.E. for Community Area lands will be considered as part of this M.C.R. As previously noted, however, a need for approximately 105 ha of Urban Employment Area lands by 2051 has been identified. As a result, it is recommended that the County explore options to expand its designated Urban Employment Area land supply. Urban S.A.B.E. to accommodate an Urban Employment Area will be evaluated based on criteria and matrix in accordance with the provincial policy framework.

S.A.B.E. requests are summarized below based on the Urban System and the Rural System.

Urban System

Urban Employment Area S.A.B.E. requests:

- Paris South Employment Area (13) – see Figure 8-2

¹ A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9., pp. 27 and 28.



Urban Community Area (residential) S.A.B.E. requests:

- Paris East (1) – 750 Governors Road East
- Paris Sharp Road (2) – 18.2 ha TCA lands outside the Paris Settlement Area Boundary, south of Sharp Road

Rural System – Secondary Settlement Areas and Rural Lands

Secondary Settlement Area/Rural Employment Area S.A.B.E. requests:

- Cainsville Employment Area (2) – Papple Road (93 ha); 112-114 Old Onondaga Road (42 ha + 26 ha)
- New Durham Employment Area (1)
- Airport/Oakhill Employment Area (1) – conversion to residential
- Burford (1) – north side Eighth Concession Road/Bishopsgate Road

Secondary Settlement Areas and Hamlets Residential S.A.B.E. requests:

- Oakhill/Airport Settlement Area (3) – 243; 245; and 299-301 Oakhill Drive
- Mount Pleasant (2)
- Hamlets - Cathcart (1), Onondaga (1)

S.A.B.E. requests within the Rural System have been reviewed by County staff in accordance with the provincial policy framework of the P.P.S., 2020, the Growth Plan, 2019, and based on the justification that constitutes good land-use planning, meeting the intent and tests of the *Planning Act*. The review is also based on the Municipal Comprehensive Review and Residential and Employment Land Needs Assessment, along with the Preliminary Policy Directions presented to Council on June 10, 2021 regarding S.A.B.E.s. The allocation of growth (residential) regarding the Primary Settlement Areas and Secondary Settlement Areas indicated that the majority of residential growth will be in the County's Strategic Growth Areas of Paris and St. George, with full municipal services; supporting the Growth Plan, 2019 and the P.P.S., 2020. In addition, several of the S.A.B.E. requests for rural employment lands did not constitute or justify an overall need for additional rural employment lands nor the expansion of an existing business. Specifically in Cainsville, the Brant-Brantford Boundary Adjustment Agreement states that full municipal services will only be available within the current settlement area boundary of Cainsville, for only industrial,



commercial and institutional (IC&I) lands; and this Boundary Adjustment Agreement will not be re-negotiated.

Most of the S.A.B.E. requests outside the Strategic Growth Areas did not constitute minor rounding out of Secondary Settlement Areas, where only partial or no servicing is available. In addition to the County's infrastructure, the impacts to the protection resources indicate that the proposals received are not supportable for further review.

8.2 S.A.B.E. Review Approach

S.A.B.E. requests adjacent to the Paris 403 Business Park were selected as the focus area for review since these sites are in proximity to an Employment Area with the greatest demand for Employment Area growth. The Paris 403 Business Park has been identified by the County of Brant as a potential P.S.E.Z., an area identified for long-term protection related to job creation and economic development. A request for the P.S.E.Z. has been submitted to the Province for the creation of a P.S.E.Z. within the Paris 403 Business Park. The Paris 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

The S.A.B.E. requests in the Paris 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes which will be submitted to and examined by Province for review and approval:

- Municipal Servicing (water/wastewater and transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction Impacts;
- Land-Use Planning; and
- Market Analysis.

Figure 8-1 provides the S.A.B.E. evaluation criteria summary and is based on the above six themes which have been organized to address the policy requirements of the Growth Plan, 2019 and the P.P.S., 2020, as well as local criteria. It is important to note that the evaluation criteria have been summarized based on background work completed. The matrix includes 21 local and provincial criteria for a S.A.B.E. assessment within an evaluation spectrum that assess the site based on how well the



S.A.B.E. site addresses the criteria. The evaluation spectrum ranges from favourable in dark green to less favourable in orange. It is important to note that the evaluation matrix does not use a quantitative scoring and/or weighting system. The purpose of the matrix is to review each site based on a comprehensive criterion and identify potential opportunities and challenges for each site.

A completed matrix has been prepared for each of the nine S.A.B.E.s in the Focus Area and is provided in Appendix L. Key highlights of the results of the assessment are discuss herein. S.A.B.E. requests within the Rural System are discussed later in this chapter in accordance with the provincial policy framework.



Figure 8-1a
County of Brant
Settlement Area Boundary Expansion (S.A.B.E.) Criteria Matrix

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/wastewater and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?	Available	Highly Feasible	Feasible	Low Feasibility	Growth Plan, 2019 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019 - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available	Highly Feasible	Feasible	Low Feasibility	P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019 - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019 - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS	Less than 10%	10% to 25%	Greater than 25%	Growth Plan 2019 - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No	Within 1 km	Adjacent to Site	On Site	Growth Plan, 2019 - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No	Adjacent to site buffered	Adjacent to site not buffered	On Site	Growth Plan, 2019 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Figure 8-1b
County of Brant
Settlement Area Boundary Expansion (S.A.B.E.) Criteria Matrix

Topic Area	Criteria	Evaluation		Provincial Policy Relationship	Topic Area	Criteria
Agriculture & Agri-Food Network	As defined by the P.P.S., 2020, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7		Actively used for agriculture, Class 4 to 7	Class 1 to 3	P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture	Low level of agriculture activity (mixed: crops/ & or livestock)	Moderate level of agriculture activity (crops)	High level of agriculture activity (crops)	Growth Plan, 2019 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to the surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Local Criteria
	Any impact on Minimum Distance Separation (M.D.S.) requirements?	Outside any Setback	Minimal Impact	Moderate Impact	High Impact	Growth Plan, 2019, 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Figure 8-1c
County of Brant
Settlement Area Boundary Expansion (S.A.B.E.) Criteria Matrix

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints at the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No	Low	Moderate	High	Local Criteria
	Is the expansion area located in an area with potential high demand for employment growth?	Yes		No		Local Criteria
	Does the site area offer the opportunity to expand the existing Employment Area (critical mass)?	Adjacent	Separated by Arterial	Separated by Highway	Separated by Other Uses	Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity	Good Opportunity	Moderate Opportunity	Low Opportunity	Local Criteria
	Does the site offer good connectivity and exposure to major transportation corridors, including a provincial highway?	Direct Access	Within 1 km via Arterial	Beyond 1 km via Arterial	Not on Major Arterial and 1 km+ from Highway	Growth Plan, 2019 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing the site area as Employment Area on nearby or adjacent uses?	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Growth Plan, 2019, 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact	Minimal Impact	Modest Impact	High Impact	Local Criteria
	Does the site offer a good transition from new to existing development?	Highest Opportunity	Good Opportunity	Moderate Opportunity	Low Opportunity	Growth Plan, 2019 - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8

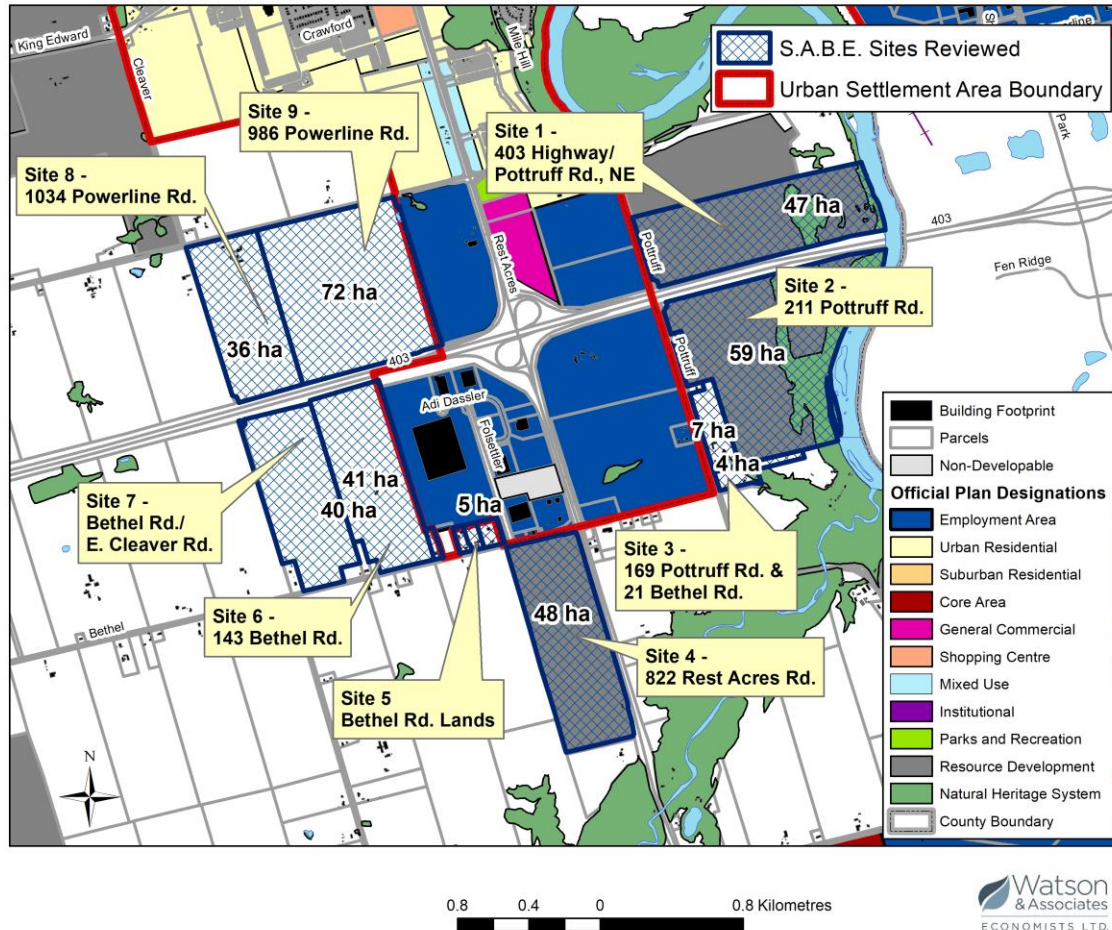


8.3 S.A.B.E. Employment Areas Sites Assessed

8.3.1 S.A.B.E. Locations

Figure 8-2 provides a map of the nine S.A.B.E. Urban Employment Area requests in the Paris 403 Business Park including size of site (net of environmental features). Overall, the nine packaged requests total approximately 345 gross ha (net of natural heritage features and constraint lands).

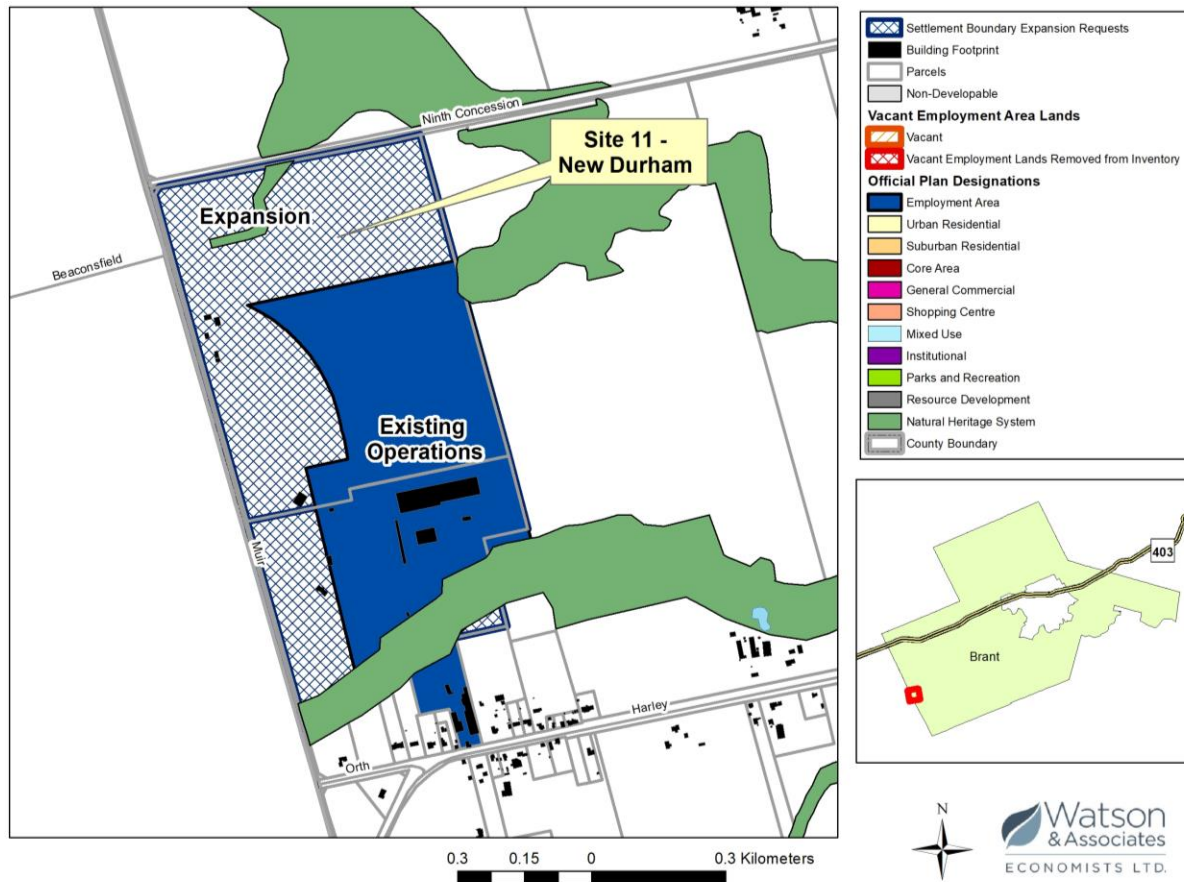
Figure 8-2
County of Brant
S.A.B.E. Urban Employment Area Sites Reviewed



Note: Figure includes current County of Brant O.P. (2012) Designations.



Figure 8-3
County of Brant
S.A.B.E. Rural Employment Area Reviewed



Note: Figure includes current County of Brant O.P. (2012) Designations.

8.3.2 S.A.B.E. Site Descriptions

Site 1 - 403 Highway and Pottruff Road Rd. (northwest quadrant of highway interchange)

- S.A.B.E. Site 1 is situated on lands currently designated in the County's O.P. as Resource Development, east of Pottruff Road and north of Highway 403.
- Site 1 is approximately 47 ha net of environmental features.
- Pottruff Road separates the S.A.B.E. from Employment Area lands to the west which are currently vacant. To the north and east of the site is the Grand River. There is also a tract of agriculture land to the northeast. To the south are



additional lands designated as Resource Development which are also a S.A.B.E. site (Site 2).

- Site 1 as Resource Development has approximately a 15-year lifespan remaining on resource extraction capability.
- The following are some considerations:
 - Lifespan of the land as an aggregate operation; Growth Plan, 2019 Policy 4.2.8 requires municipalities to conserve aggregate resources;
 - Impact on environmental features, including the Grand River; and
 - Potential fragmented agriculture lands to the northeast.

Site 2 – 211 Pottruff Road (southeast quadrant of highway interchange)

- S.A.B.E. Site 2 is situated on lands currently designated in the County's O.P. as Resource Development, east of Pottruff Road and south of Highway 403.
- Site 2 is approximately 59 ha net of environmental features.
- Pottruff Road separates the S.A.B.E. from Employment Area lands to the west which are currently vacant. There is also a small tract of designated agriculture to the west. To the east of the site is the Grand River. To the north are additional lands designated as Resource Development which are also a S.A.B.E. site (Site 1). To the south includes designated agriculture lands.
- Site 2 as Resource Development has approximately a 10-year lifespan remaining on resource extraction capability.
- The following are some considerations:
 - Lifespan of the land as an aggregate operation; Growth Plan, 2019 Policy 4.2.8 requires municipalities to conserve aggregate resources;
 - Impact on environmental features, including the Grand River; and
 - Impact on the small tract of designated agriculture lands between Site 2 and the existing Employment Area.

Site 3 – 169 Pottruff Road and 21 Bethel Road (south of the existing Employment Area)

- S.A.B.E. Site 3 is situated on lands currently designated in the County's O.P. as Agriculture, east of Pottruff Road and south of Highway 403.
- The sites are privately owned; the owners live at both addresses.
- The sites are surrounded by employment/industrial lands and owners would like to transition the properties to allow, as an example, M1 and M2 zoning to permit family businesses or other options.



- Site 3 consists of two narrow parcels of approximately 11 ha net of environmental features and are between designated Employment Area lands to the west and Resource Development lands (also reviewed as S.A.B.E. Site 2) to the east.

Site 4 – 822 Rest Acres Road (southeast quadrant of highway interchange)

- S.A.B.E. Site 4 is situated on lands currently designated in the County's O.P. as Resource Development, east of Rest Acres Road and south of Highway 403.
- Site 4 is approximately 48 ha net of environmental features.
- Site is surrounded by designated agriculture land to the east, west and south. To the north are designated occupied/developed Employment Area lands.
- Site 4 could be considered as future employment lands after a 25-year+ resource extraction.
- The following are some considerations:
 - Lifespan of the land as an aggregate operation; Growth Plan, 2019 Policy 4.2.8 requires municipalities to conserve aggregate resources; and
 - Containment of urban growth since surrounded by rural lands.

Site 5 – Bethel Rd. Lands (multiple sites, adjacent to existing Employment Area)

- S.A.B.E. Site 5 is situated on lands currently designated in the County's O.P. as Agriculture and the lands are adjacent to occupied and developed Employment Areas to the north and east. To the south of the multiple sites are designated agriculture lands.
- The four sites are small and total 5 ha; the S.A.B.E. would involve a minor rounding out of the existing Employment Area and provide a more logical southern delineation of the Employment Area.

Site 6 – 143 Bethel Rd. (southwest quadrant of highway interchange)

- S.A.B.E. Site 6 is situated on lands currently designated in the County's O.P. as Agriculture and is adjacent to occupied and developed Employment Areas to the east. The site is surrounded by additional S.A.B.E. sites to the west (Site 7) and to the north (Site 9). To the south is designated Agriculture land.
- Site 6 is approximately 41 hectares.



Site 7 – Bethel Rd./Cleaver Rd. (southeast quadrant of highway interchange)

- S.A.B.E. Site 7 is situated on lands currently designated in the County's O.P. as Agriculture and is surrounded by additional S.A.B.E. sites to the east (Site 6) and to the north (Site 8), although to the north is Highway 403. To the west and south is designated Agriculture land.
- Site 7 is approximately 40 hectares.
- Site 7 would require that Site 6 be brought into the Urban System; otherwise, Site 7 would not form as part of contiguous Employment Area.

Site 8 – 986 Powerline Road (northwest quadrant of highway interchange)

- Site 8 is approximately 36 ha on lands designated Agriculture. To the north and west of the site are Agriculture lands. Another S.A.B.E. request is to the east (Site 9) and to the south is Highway 403 with another S.A.B.E. site to the south (Site 7).
- To the northeast is an aggregate operation.
- Site 8 would require that Site 9 be brought into the Urban System; otherwise, Site 8 would not form as part of contiguous Employment Area.

Site 9 – 1034 Powerline Road (northwest quadrant of highway interchange)

- S.A.B.E. Site 9 is the largest S.A.B.E. site at 72 ha. The site is adjacent to the vacant designated Employment Area lands to the east. To the north are agriculture lands that are between Site 9 and the existing urban area. S.A.B.E. Site 9 is situated on lands currently designated in the County's O.P. as Agriculture. To the west of the site is another S.A.B.E. Site (Site 8) and to the south (Site 7), although to the south is Highway 403.
- The following are some considerations:
 - Designated agriculture lands to the north that may become fragment since surrounded by urban uses on three sides; and
 - Containment of urban growth since surrounded by rural lands.

Site 11 – New Durham

- Site 11 (New Durham) involves the expansion of the existing operation, requiring 23 ha of land. The expansion would allow a larger employer to expand its



existing operations, which is a large successful business and employer that has created many jobs in the rural area.

- Based on the Growth Plan, 2019, the request meets the S.A.B.E. requirements for rural S.A.B.E.
- The evaluation was contingent on an Agricultural Impact Assessment (A.I.A.) and M.D.S. requirements, which were submitted with the application and were successful with minimal impacts to the agricultural system, as per the County's A.I.A. evaluation.

8.4 S.A.B.E. Employment Area Assessment

The following section summarizes the results of the S.A.B.E. preliminary analysis and results. As previously discussed, an evaluation matrix and background work have been completed as part of the S.A.B.E. assessment. The main purpose of this section is to summarize the findings of the County's technical analysis and technical studies submitted, to assess the most appropriate locations for new employment lands.

This report also provides the S.A.B.E. concept maps which presents the general layout of the preferred S.A.B.E. areas based on the technical review results. The concept map will be subject to more detailed analysis of water, wastewater and transportation infrastructure needs, and A.I.A. and M.D.S. calculations.

The results of the S.A.B.E. review consist of a draft S.A.B.E. area, which will be submitted to the Province for review, along with the new O.P.

The completed evaluation matrix and select background work are provided in Appendix L.

8.4.1.1 Municipal Servicing (Water/Wastewater and Transportation)

The County undertook a review to establish infrastructure planning principles, timing and growth allocation, phasing of water/wastewater availability and relevant Master Servicing Plans used to evaluate the S.A.B.E. requests. The review included a high-level assessment of available servicing capacity and infrastructure cost impacts.

Transportation planning principles were established through a policy review and discussions regarding the County's Transportation Master Plan which is underway. Transportation implications of accommodating forecast additional growth included



advantages and disadvantages of the S.A.B.E. locations for additional employment lands from a transportation perspective.

Section 2.2.8 of the Growth Plan, 2019 requires that there be sufficient capacity in existing and planned infrastructure, including transit and transportation corridors and facilities, to service new or expanded settlement areas. The Growth Plan, 2019 requires that transportation infrastructure related to the movement of people and goods is an important investment to be considered as part of the land-use planning process.

The municipal servicing component of the review of the sites assessed the following criteria:

- Optimize the use of existing infrastructure where possible, with consideration to available and reserve capacity in the water and wastewater system.
- Utilize infrastructure where future planned growth is located.
- How easily can a water/wastewater servicing and connection be made available to the lands?
- Provide the reliability and security in the long-term distribution of drinking water and collection of wastewater.
- When extending services, what is the level of impact on the natural environment, including key hydrologic features and areas?
- How feasible is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?
- Can sustainable modes of transportation and the impact of transportation networks on the natural environment be addressed?

Key highlights of the assessment included the following:

- Water and wastewater servicing requirements and timing for each parcel were assessed. The northwest quadrant of the Highway 403/Rest Acres Road area was better positioned for immediate future servicing (Sites 8 and 9). The southeast quadrant (Sites 2 and 3) was less preferred based on servicing requirements, but long-range the servicing would be more favourable (15 years+). The southwest quadrant (Sites 6 and 7), west of Bethel Well are better positioned for future servicing, but have additional details and require a Phase 2 Detailed Assessment of infrastructure associated with the S.A.B.E. and the impacts to key hydrologic features of the Bethel Wellhead Protection Area.



- Transportation review included sustainable modes of transportation, vehicle traffic and road network connectivity. The goods flow movement is categorized as an economic transportation principle. The preliminary assessment gave relative merit for expansion options in the Highway 403/Rest Acres Road corridor for additional prestige employment lands meeting these criteria.
- For Climate Change and sustainable modes of transportation, the location of the Highway 403/Rest Acres Road corridor provides facilitated access to employment lands with less distance travelled through urban areas of Paris.

Overall, from a municipal servicing perspective the following sites rank the most favourable:

- Sites in the northwest quadrant, Sites 8 and 9 (totalling 108 ha).

Further, from a municipal servicing perspective the following sites provide opportunity, but require a detailed assessment of infrastructure associated with the S.A.B.E. and impact of the Bethel Wellhead Protection Area:

- Sites in the southwest quadrant, Sites 6 and 7 (totalling 80 ha).

The following sites are less preferred from a municipal servicing perspective within the short and medium term (within 15 years), but provide opportunity in the long term:

- Sites in the southeast quadrant, Sites 2 and 3 (totalling 70 ha).

8.4.1.2 Environmental Protection and Protection of Resources

Section 4.2.1 of the Growth Plan, 2019 requires that watershed planning be undertaken and water resource systems identified. Moreover, watershed planning or the equivalent will inform decisions on allocation of growth. The environmental protection and protection of resources component of the review of the sites assessed the following criteria:

- What is the impact on the watershed if developed as urban?
- How fragmented is the site area when planning to protect the Natural Heritage System? (recognizing the importance to preserve linkages between natural features)
- How much of the site area includes Natural Heritage Systems lands?



- What is the impact on Climate Change, Energy and Emissions Reductions?
- Does the site area contain known mineral resources (aggregates) or are there mineral resources or active aggregate operations in proximity to the site (adjacent to site, within 1 km)?
- Consider the natural, built, cultural environment and heritage of the community.
- Determine the archaeological potential of the sites for S.A.B.E. and any previous cultural heritage sites.
- Take into consideration any issues and concerns from our Indigenous partners and neighbours with any S.A.B.E. request, and impact to Treaty Lands.
- Any cultural or heritage features, landscapes, buildings on site or adjacent to the site?

Key highlights of the assessment included the following:

- Contiguous expansion of existing settlement area and employment lands in Paris.
- Proximity to existing or planned transportation infrastructure.
- Avoidance of natural areas and constraint lands.
- Connection with planned infrastructure for water and wastewater over the long term.
- Any mineral resource extraction sites (Sites 1, 2 and 4) will not be ready for employment land re-designation until the life expectancy of these sites is exhausted.

Overall, from the environmental protection and protection of resources perspective the following sites are considered favourable:

- Sites in the northwest quadrant, Sites 8 and 9 (totalling 108 ha)
- Sites in the southeast quadrant, Site 5 (totalling 5 ha).

Additionally, the following sites are within the Bethel Wellhead Protection Area and require further study:

- Sites in the southwest quadrant, Sites 6 and 7 (totalling 81 ha).



In addition, the following sites have aggregate operations and would not be ready for employment land re-designation until the life expectancy of these sites is exhausted.

- Sites 1 (northeast quadrant), 2 (southeast quadrant) and 4 (south of Employment Area) (totalling 154 ha).

8.4.1.3 Agriculture & Agri-Food Network

The County undertook an A.I.A. along with M.D.S. calculations, which is required by provincial and municipal policy to provide specific recommendations for the S.A.B.E. that will minimize impact on the County's agricultural system. The assessment is intended to minimize the impacts on the Agricultural System and also ensure compliance with M.D.S. formulae associated with certain farm operations.

The agriculture and agri-food network component of the review of the sites assessed the following criteria:

- As defined by the P.P.S., 2020, what is the agriculture soil class of the lands?
- What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)
- Would the urbanization of the site area introduce/increase traffic flow to the surrounding area?
- Identification of properties subject to Minimum Distance Separation (M.D.S.) formulae.
- Are there any areas with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)

Overall, a S.A.B.E. on all the sites reviewed would have a low impact on the agriculture and agri-food network in the County. The agriculture soil type for all sites is Class 4 to 7. None of the sites have specialty crops (e.g., fruit harvesting). Two of the sites have some agricultural activity; however, the agriculture activity is considered low with a mix of crops and livestock. Some of the sites would require an M.D.S. assessment; however, it is estimated that the impact would be low.

Key findings on the agriculture and agri-food network are provided below.



Very low impact on Agriculture and Agri-Food Network:

- Site 1 (northwest quadrant) – Not actively used for agriculture; Class 4 to 7; and negligible impact on surrounding agriculture operations.
- Site 2 (southeast quadrant) – Not actively used for agriculture; Class 4 to 7; and negligible impact on surrounding agriculture operations.
- Site 3 (southeast quadrant) – Not actively used for agriculture; Class 4 to 7; and negligible impact on surrounding agriculture operations.
- Site 5 (southwest quadrant) – Not actively used for agriculture; Class 4 to 7; negligible impact on surrounding agriculture operations; site area already includes a developed industrial use; and small site (5 ha).

Low impact on Agriculture and Agri-Food Network:

- Site 4 (south of existing Employment Area) – Not actively used for agriculture; Class 4 to 7; minimal impact on surrounding agriculture operations; and M.D.S. minimal impact.
- Site 6 (southwest quadrant) – Low level of agriculture activity (mixed: crops and/or livestock); Class 4 to 7; and minimal impact on surrounding agriculture operations.
- Site 7 (southwest quadrant) – Low level of agriculture activity (mixed: crops and/or livestock); Class 4 to 7; and minimal impact on surrounding agriculture operations.
- Site 8 (northwest quadrant) – Not actively used for agriculture; Class 4 to 7; minimal impact on surrounding agriculture operations; and M.D.S. minimal impact.
- Site 9 (northwest quadrant) – Not actively used for agriculture; Class 4 to 7; minimal impact on surrounding agriculture operations; and M.D.S. minimal impact.

Further details on the impact on the agriculture and agri-food network would be provided in a separate document once candidate sites are selected.

8.4.1.4 Market Analysis

As previously discussed, the Paris 403 Business Park has been selected as the focus area for an Urban Employment Area S.A.B.E. due to anticipated market demand for



Employment Area development. Each of the nine sites has been further reviewed based on their market potential and ability to add to the competitiveness of the County's Employment Area land supply. A market analysis of each site has been conducted based on the following criteria:

- Are there constraints at the site area that would negatively impact the feasibility of the development of the site (e.g., contaminated lands and topography)?
- Is the expansion area located in an area with potential high demand for employment growth?
- Does the site area offer the opportunity to expand the existing Employment Area (critical mass)?
- Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?
- Does the site offer good connectivity and exposure to major transportation corridors, including a provincial highway?

Key highlights of the assessment included the following:

- Since Sites 1, 2 and 4 have operated as aggregate operations, they will require site remediation to transition to Employment Area use which may delay the timing of the lands for development and it may pose challenges in providing an optimal building site area. Sites 1 and 2 also have significant environmental features and are adjacent to the Grand River. When compared to the other candidate sites, Sites 1 and 2 potentially provide a less favourable site configuration for Employment Area development and land utilization.
- Site 5 totals 5 ha and from a market perspective does not provide a significant benefit in supporting long-term employment planning. It is recognized, however, that from a planning perspective these sites have merit in bringing them into the Urban System as they enhance the configuration of the Employment Area by providing a discernible boundary to the Paris 403 Business Park.
- Sites 6, 7, 8 and 9 are generally large flat parcels with no major environmental features (Natural Heritage Systems).
- All sites are within 1 km of the Highway 403 interchange. Road improvements to facilitate the traffic to and from these sites will need to be considered.



Overall, from a market analysis perspective the following sites rank the most favourable:

- Sites 6, 7 (southwest quadrant), 8 and 9 (northwest quadrant) (totalling 189 ha).

8.4.1.5 Growth Management/Land-Use Planning

Each of the candidate sites has been reviewed based on its ability to contain urban growth, compatibility with surrounding land uses and general planning principles outlined in the Growth Plan, 2019 and the P.P.S., 2020, related to Employment Areas.

A review of each site has been conducted within the context of growth management and land-use planning principles based on the following criteria:

- What are the impacts of developing the site area as an Employment Area on nearby or adjacent uses?
- How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)
- Does the site offer a good transition from new to existing development?

Key highlights of this assessment included the following:

- Sites 7 and 8 cannot be brought into the Urban System independently since these sites are not adjacent to the existing Employment Area. These sites are dependent lands to the east being brought into the Urban System.
- Site 9, while adjacent to an existing Employment Area to the east, may lead to the fragmentation of designated agriculture land to the north, which is surrounded by the urban area on three sides.
- Sites 6 and 7 are adjacent to the existing Employment Area and would not lead to the fragmentation of surrounding agricultural lands.
- Site 4 would lead to an irregular Employment Area boundary, extending much further south than the rest of the Employment Area. As such, expanding into this site would not provide a discernable edge to the southern boundary of the Employment Area, which may lead to land-use conflicts with the surrounding agricultural area.
- Sites 1, 2 and 4 are designated as Resource Development and are active operations. The depletion of the County’s aggregate lands would not support



Growth Plan, 2019 Policy 4.2.8 which requires municipalities conserve aggregate resources.

- Site 5 would provide for a logical Employment Area, although the land area would not provide a significant contribution in reducing the County's deficit of Urban Employment Area lands.

Overall, from a growth management and land-use planning perspective the following sites rank most favourable:

- Sites 6 (southwest quadrant), 7 (southwest quadrant), 8 (northwest quadrant) and 9 (northwest quadrant) (totalling 189 ha).

In addition, the following smaller sites should be considered for urban expansion:

- Site 5 (totalling 5 ha).

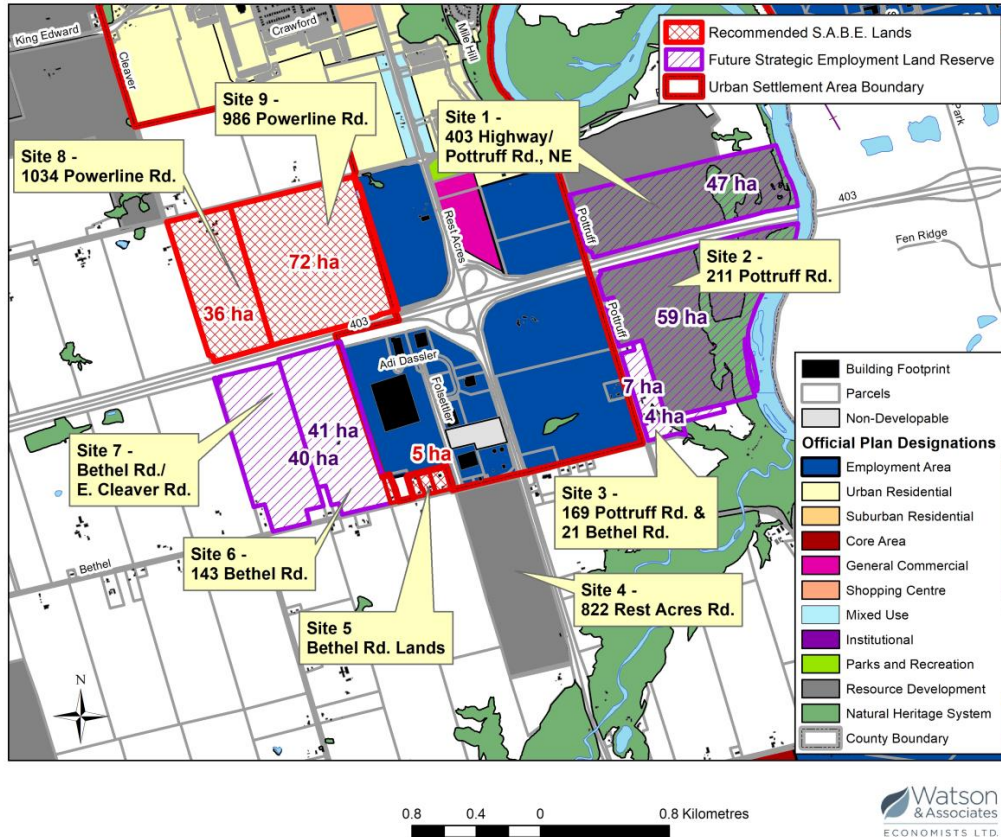
8.5 S.A.B.E. Employment Area Recommendations

Based on the S.A.B.E. Employment Area assessment, it is recommended that Sites 8 and 9 as identified in Figure 8-4 be brought into the urban boundary to accommodate Employment Area land S.A.B.E, totalling 108 ha. These sites rank favourable based on all the S.A.B.E. criteria themes discussed. The sites are a favourable from a market and growth management perspective, as well as the most feasible for municipal servicing and have the least impact on the environment/resources and the agriculture base of the County. In addition, it is recommended that Site 5, a site area with multiple small parcels totalling 5 ha, be brought into the Paris settlement area designated as Employment. These sites are not anticipated to contribute significant employment; however, they would provide a more discernible southern edge of the Employment Area. It should be noted that some of the parcels are already developed.

Furthermore, it is recommended that the County identify possible lands for potential S.A.B.E. As part of the S.A.B.E. analysis, the County identified Future Strategic Employment Reserve lands (approximately 198 ha) which are identified for future S.A.B.E. if demand warrants over the 2051 horizon. Sites recommended for S.A.B.E. and as Future Strategic Employment Reserve lands are areas to be reviewed if demand warrants over the planning horizon.



Figure 8-4
County of Brant
S.A.B.E. Urban Employment Area Recommendation



Note: Figure includes current County of Brant O.P. (2012) Designations.

8.6 Rural Employment Area S.A.B.E.

8.6.1 S.A.B.E. Locations

Figures 8-5 and 8-6 provide maps of the two S.A.B.E. Rural Employment Area requests in Cainsville and New Durham. Overall, the nine requests total 125 gross ha (net of environmental features). The two Rural Employment Area S.A.B.E. requests were reviewed based on the Growth Plan, 2019 Policy 2.2.9.

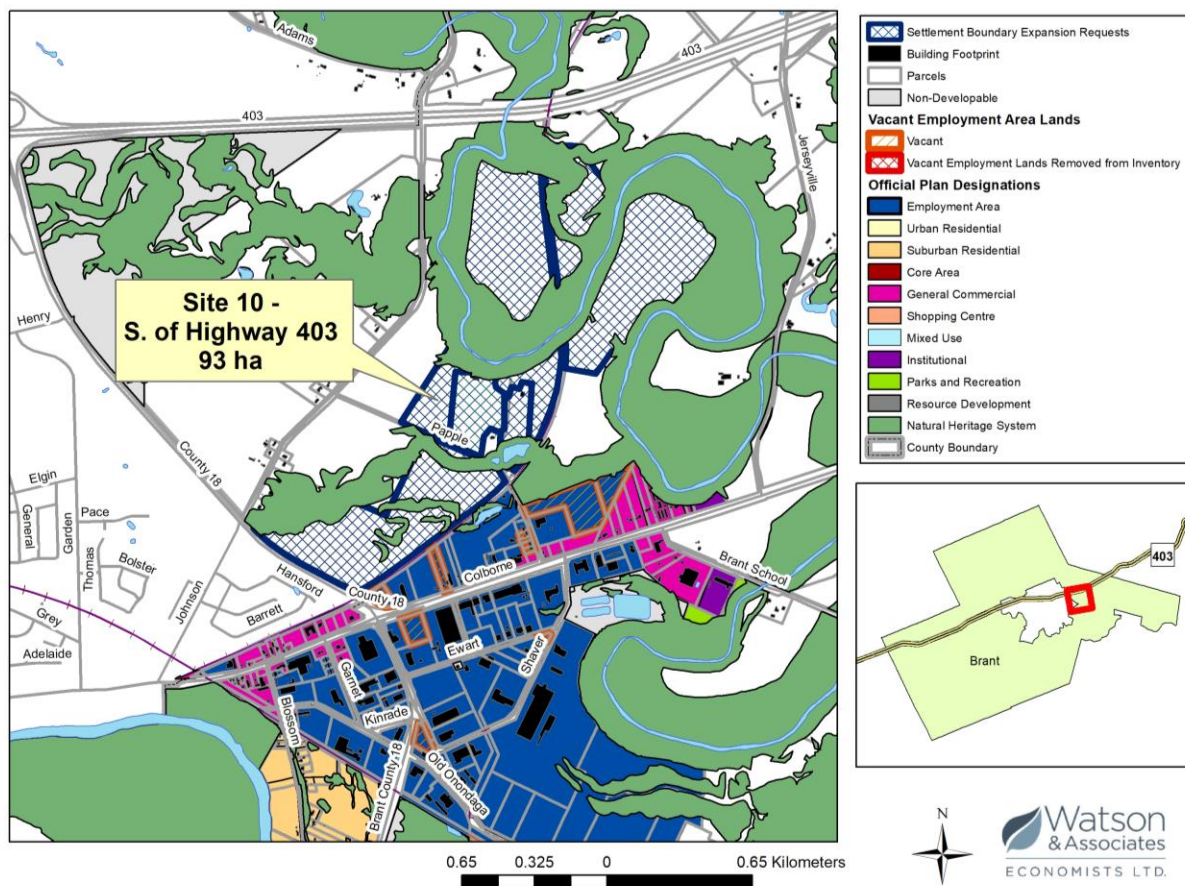
- Site 10 (Cainsville) is a large site of 93 ha. The S.A.B.E. is not part of a proposal for an expansion of existing use or businesses. As such, based on the Growth Plan, 2019, expansion does not meet the requirement for S.A.B.E. for Rural



Employment Areas. Further, it is important to note that the site consists of a large supply of vacant land which provides opportunities for existing businesses to expand within Cainsville over the longer term.

- Site 11 (New Durham) involves the expansion of the existing operation, requiring 23 ha of land. The expansion would allow a larger employer to expand its operations. Based on the Growth Plan, 2019, the request meets the S.A.B.E. requirements for a rural S.A.B.E., contingent on agricultural impact and M.D.S. requirements.

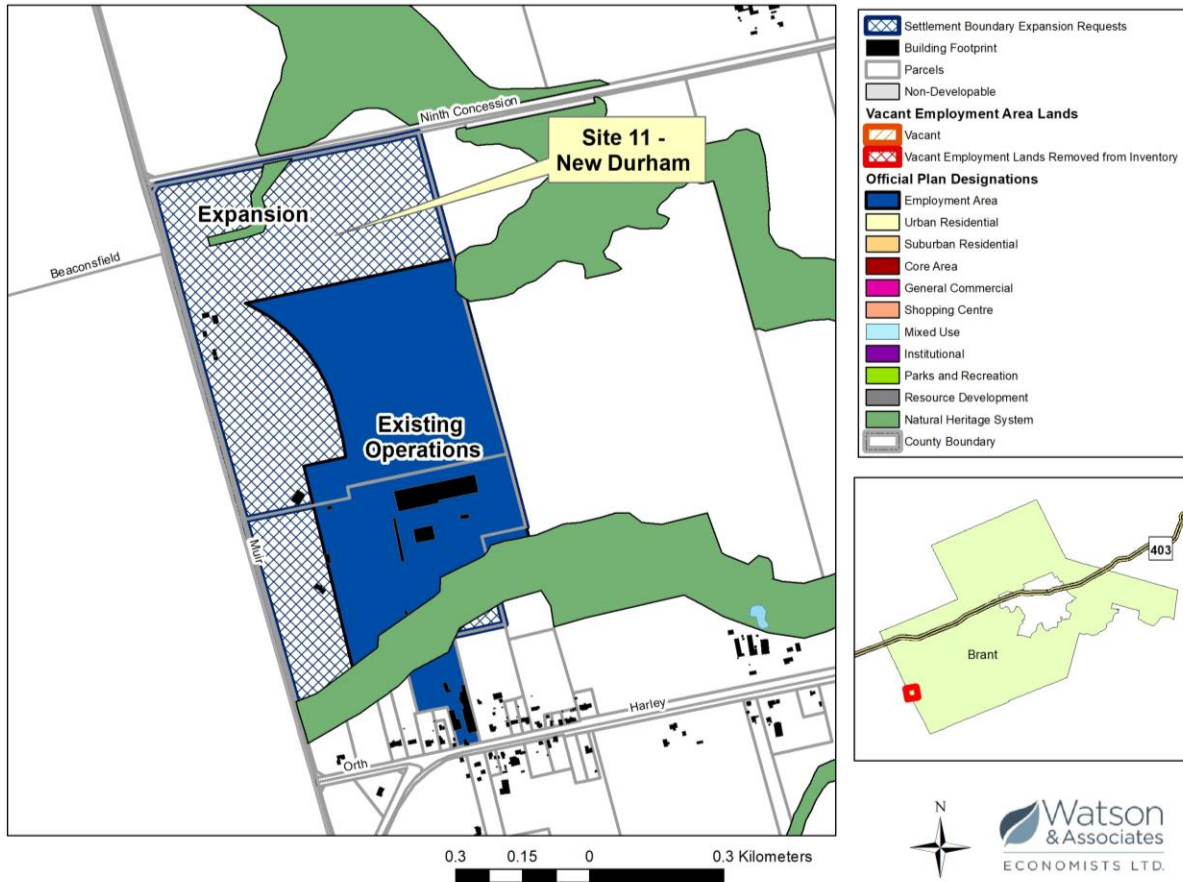
Figure 8-5
County of Brant
S.A.B.E. Rural Employment Area Requests



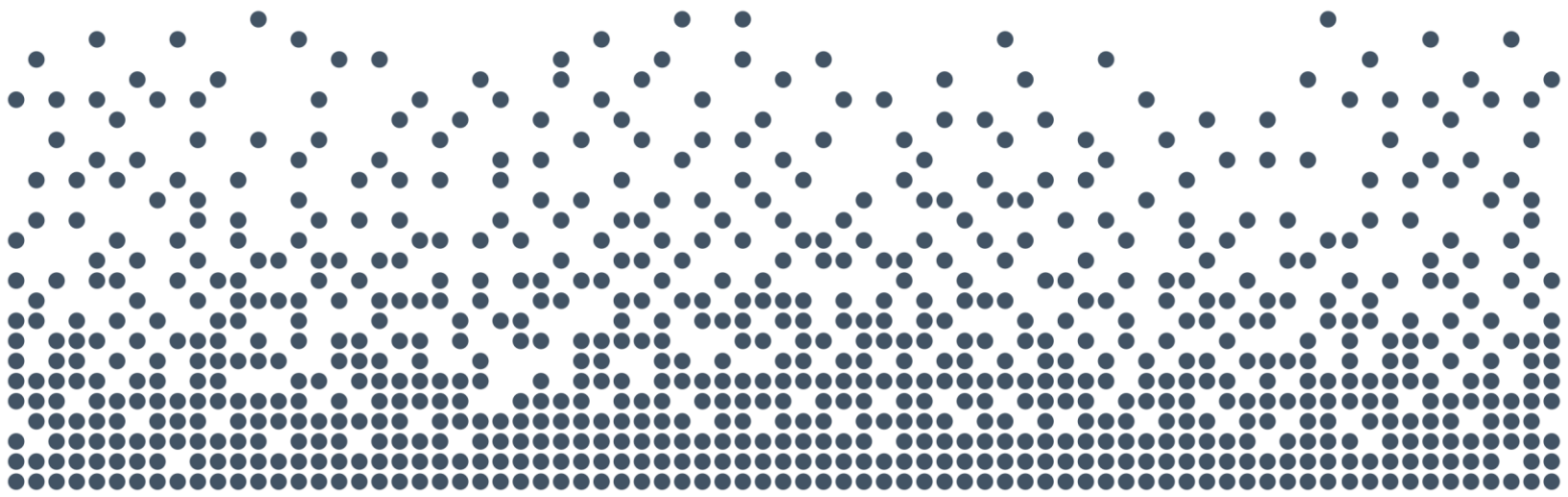
Note: Figure includes current County of Brant O.P. (2012) Designations.



Figure 8-6
County of Brant
S.A.B.E. Rural Employment Area Requests



Note: Figure includes current County of Brant O.P. (2012) Designations.



Chapter 9

Conclusions



9. Conclusions

Based on the comprehensive analysis carried out herein, it has been determined that the County has a surplus of Community Area land of approximately 395 gross ha to 2051. These surplus lands are not considered to be needed until the post-2051 period and will be subject on ongoing review upon subsequent O.P. reviews. It is noted that the excess Community Area lands in Paris and St. George are not considered interchangeable with the identified shortfall of Urban Employment Areas, which is identified in Chapter 6. It is recommended that the County's new O.P. identify excess Community Area lands that will be subject to a special policy overlay based on phasing policies within Paris and St. George. This overlay will identify excess Community Areas lands as a reserve for future urban development beyond the 2051 planning horizon.

The County of Brant has a surplus of approximately 49 ha of designated urban commercial land to accommodate commercial growth over the planning horizon. The County should prioritize new commercial development within the B.U.A. to support intensification and place-making, as well as directing growth to established commercial nodes and corridors to ensure that commercial growth is contained.

The County has a shortfall of designated Urban Employment Area lands of approximately 105 gross ha. The shortfall within Paris is approximately 110 ha, and St. George has a small surplus of 5 gross ha. The County should explore options to add additional Urban Employment Areas, including expanding the settlement area boundary in Paris to accommodate additional Employment Area lands in the Paris 403 Business Park. The County received several requests for S.A.B.E.s in this area. The Paris 403 Business Park is considered a key opportunity for the County in reaching its employment forecasts.

The S.A.B.E. requests in the Paris 403 Business Park focus area were further reviewed utilizing an evaluation matrix based on key themes which will be submitted to and examined by the Province for review and approval:

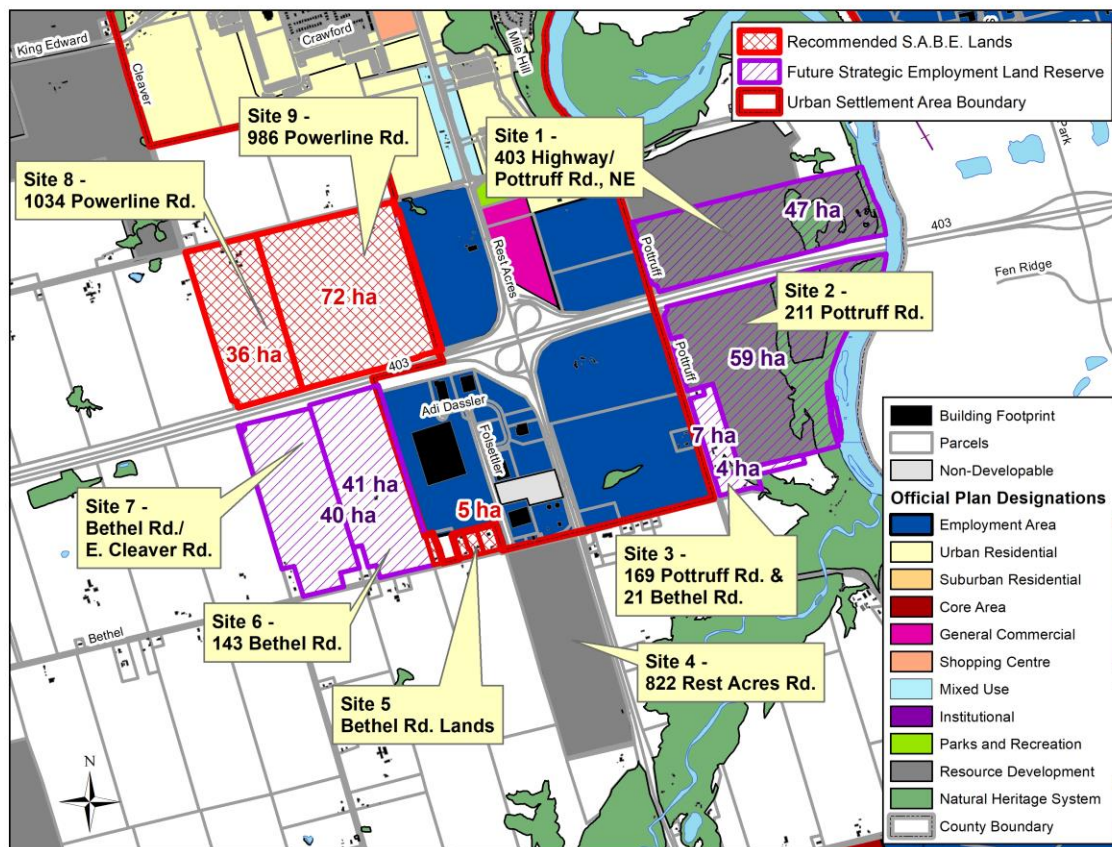
- Municipal Servicing (Water/Wastewater and Transportation);
- Environmental Protection and Protection of Resources;
- Agriculture & Agri-Food Network;
- Cross-Jurisdiction Impacts;
- Land-Use Planning; and



- Market Analysis.

As part of the S.A.B.E. analysis, the County identified areas for immediate need by 2051 (approximately 113 ha), as well as Future Strategic Employment Reserve lands (approximately 198 ha) which are identified for future S.A.B.E. if demand warrants over the 2051 horizon. Sites recommended for S.A.B.E. and as Future Strategic Employment Reserve are identified in Figure 9-1.

Figure 9-1
County of Brant
S.A.B.E. Sites Reviewed



Note: Figure includes current County of Brant O.P. (2012) Designations.

The County reviewed six requests for Employment Area land conversions. It is recommended that all sites requested for conversion remain as Employment Areas,



except for 326 Grand River St. N., a site which is recommended to broaden the permissions for commercial uses as part of the proposed Grand River St. N. corridor overlay. A conversion request site evaluation has been completed for each Employment Area and is provided in Appendix K.

A preliminary policy directions report has been prepared and is informed based on the findings of this M.C.R. report, as well as consultation with the public and Council. The preliminary policy direction report was completed in tandem with this M.C.R. report. Key technical findings and milestones of the M.C.R. were presented to Council and the public over the past year. This M.C.R. report primarily includes information to support the growth management policy theme of the County's new O.P. These preliminary directions aim to inform and develop policies and procedures for the County of Brant to the year 2051, based on seven strategic directions. The County's new O.P. has been completed in draft form for public comment.



Appendix A

County of Brant Housing Headship Rates



Appendix A: County of Brant Housing Headship Rates, 2016 to 2051

Figure A-1: County Brant, Housing Headship Rates, 2016 to 2051

Age Cohort	Household Headship Rates									
	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-14	-	-	-	-	-	-	-	-	-	-
15-24	3.6%	4.7%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%	3.2%
25-34	34.2%	31.4%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%	34.3%
35-44	47.8%	47.8%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%
45-54	50.2%	48.9%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%	51.5%
55-64	52.4%	56.9%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%	53.6%
65-74	57.8%	55.8%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%	54.4%
75+	62.6%	60.9%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%	52.6%
Total	34.2%	35.3%	35.2%	35.8%	36.2%	36.4%	36.6%	36.9%	37.1%	37.3%

Source: 2006 to 2016 derived from Statistics Canada Census data, and 2016 to 2051 by Watson & Associates Economists Ltd.



Appendix B

County of Brant Population and Housing Forecast



Appendix B: County of Brant Population and Housing Forecast

Figure B-1: County of Brant, Population and Housing to 2051

	Year	Population (Including Census undercount) ¹	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Other	Total Households	
Historical	Mid-2001	32,900	31,700	600	31,100	10,060	410	570	30	11,060	2.98
	Mid-2006	35,800	34,400	500	33,900	11,090	570	530	60	12,240	2.92
	Mid-2011	36,700	35,600	600	35,100	11,640	600	600	100	12,940	2.84
	Mid-2016	37,800	36,700	800	35,900	11,910	750	610	50	13,310	2.84
Forecast	Mid-2021	40,500	39,300	900	38,400	12,770	1,030	640	50	14,500	2.79
	Mid-2026	43,800	42,500	1,000	41,500	13,700	1,260	810	50	15,820	2.77
	Mid-2031	47,000	45,600	1,100	44,600	14,580	1,460	1,030	50	17,110	2.75
	Mid-2036	50,100	48,600	1,100	47,500	15,370	1,610	1,300	50	18,330	2.73
	Mid-2041	53,000	51,500	1,200	50,300	16,120	1,750	1,630	50	19,540	2.71
	Mid-2046	56,000	54,400	1,300	53,100	16,840	1,850	2,040	50	20,770	2.70
	Mid-2051	59,000	57,300	1,300	56,000	17,490	1,950	2,500	50	21,990	2.68
Incremental	Mid-2001 to Mid-2006	2,900	2,700	-100	2,800	1,030	160	-40	30	1,180	
	Mid-2006 to Mid-2011	900	1,200	100	1,200	550	30	70	40	700	
	Mid-2011 to Mid-2016	1,100	1,100	200	800	270	150	10	-50	370	
	Mid-2016 to Mid-2021	2,700	2,600	100	2,500	860	280	30	0	1,190	
	Mid-2016 to Mid-2031	9,200	8,900	300	8,700	2,670	710	420	0	3,800	
	Mid-2016 to Mid-2041	15,200	14,800	400	14,400	4,210	1,000	1,020	0	6,230	
	Mid-2016 to Mid-2051	21,200	20,600	500	20,100	5,580	1,200	1,890	0	8,680	

¹ Census undercount estimated at approximately 3.0%. Note: Population has been rounded.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure B-2: County of Brant, Total Population Forecast by Major Age Group, 2016 to 2051

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	9,200	9,300	8,900	8,800	9,100	9,700	10,300	10,700	11,300	11,700	12,200
20-34	5,400	6,000	6,000	6,200	6,400	6,700	6,900	7,300	7,600	8,000	8,200
35-44	5,500	5,400	4,700	4,500	4,800	5,100	5,300	5,600	5,700	6,000	6,600
45-54	5,000	5,700	6,100	5,700	5,400	5,600	6,100	6,400	6,600	7,100	7,300
55-64	3,300	4,400	5,300	5,700	6,300	6,300	6,000	6,300	6,800	7,100	7,400
65-74	2,400	2,700	3,100	4,000	5,000	5,600	6,200	6,300	6,100	6,400	6,900
75+	2,100	2,300	2,500	2,900	3,600	4,800	6,200	7,500	8,900	9,800	10,400
Total	32,900	35,800	36,700	37,800	40,500	43,800	47,000	50,100	53,000	56,000	59,000

Source: 2001 to 2016 Derived from from Statistics Canada, Demography Division. 2016 to 2051 forecast by Watson & Associates Economists Ltd.

¹ Population includes Census undercount. Forecast population includes net Census undercount of approximately 3.0%.

Note: Figures may not add precisely due to rounding.

Figure B-3: County of Brant, Total Population Forecast Shares by Major Age Group, 2016 to 2051

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	28%	26%	24%	23%	22%	22%	22%	21%	21%	20.8%	20.7%
20-34	16%	17%	16%	16%	16%	15%	15%	15%	14%	14.3%	13.8%
35-44	17%	15%	13%	12%	12%	12%	11%	11%	11%	10.8%	11.1%
45-54	15%	16%	17%	15%	13%	13%	13%	13%	12%	12.6%	12.4%
55-64	10%	12%	15%	15%	16%	14%	13%	13%	13%	12.7%	12.6%
65-74	7%	7%	8%	11%	12%	13%	13%	13%	11%	11.4%	11.7%
75+	6%	7%	7%	8%	9%	11%	13%	15%	17%	17.4%	17.7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100.0%	100.0%

Source: 2001 to 2016 Derived from from Statistics Canada, Demography Division. 2016 to 2051 forecast by Watson & Associates Economists Ltd.

¹ Population includes Census undercount. Forecast population includes net Census undercount of approximately 3.0%.

Note: Figures may not add precisely due to rounding.



Appendix C

County of Brant Population, Housing and Employment Forecasts by Urban Growth Settlement Area and Rural System



Appendix C-1: County of Brant Total Population and Housing Forecasts by Urban Growth Settlement Area and Rural System

Figure C-1: County of Brant Population, Housing and Employment, 2016 to 2051

Area	Forecast Period	Total Population With Undercount ¹	Total Residential Units	Persons Per Unit (P.P.U.)	Total Employment (Including N.F.P.O.W.) ²	Employment Activity Rate
Paris	2016	12,700	4,735	2.68	7,400	58.4%
	2021	14,400	5,460	2.64	8,300	57.9%
	2031	18,800	7,195	2.61	10,700	57.1%
	2041	21,900	8,435	2.60	13,100	59.6%
	2051	25,400	9,870	2.57	15,500	61.2%
	2016-2051	12,700	5,135		8,100	
St. George	2016	3,400	1,200	2.83	1,200	34.9%
	2021	3,500	1,265	2.77	1,200	35.3%
	2031	4,300	1,550	2.77	1,500	35.5%
	2041	6,000	2,235	2.68	2,200	36.0%
	2051	7,500	2,850	2.63	3,000	39.2%
	2016-2051	4,100	1,650		1,800	
Rural System	2016	21,800	7,330	2.97	6,300	29.1%
	2021	22,600	7,730	2.92	6,500	28.8%
	2031	24,000	8,330	2.88	6,800	28.3%
	2041	25,100	8,825	2.84	7,100	28.4%
	2051	26,100	9,225	2.83	7,500	28.8%
	2016-2051	4,300	1,895		1,200	
County of Brant	2016	37,800	13,265	2.85	14,900	39.4%
	2021	40,500	14,455	2.80	16,100	39.7%
	2031	47,000	17,070	2.75	19,000	40.4%
	2041	53,000	19,500	2.72	22,300	42.1%
	2051	59,000	21,940	2.69	26,000	44.1%
	2016-2051	21,200	8,675		11,100	

¹ Population includes net Census undercount at approximately 3.0%.

² Statistics Canada defines employees with no fixed place of work as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Source: Watson & Associates Economists Ltd.



Appendix C-2: County of Brant Detailed Population and Forecasts by Urban Growth Settlement Area and Rural System

Figure C-2: Paris Population and Housing Forecast, 2016 to 2051

Year	Population (Including Census Undercount) ¹	Households				Persons Per Unit (P.P.U.)
		Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	12,700	3,665	560	510	4,735	2.60
2021	14,400	4,065	850	545	5,460	2.56
2026	16,700	4,585	1,065	715	6,365	2.55
2031	18,800	5,030	1,230	935	7,195	2.53
2036	20,400	5,370	1,365	1,120	7,855	2.53
2041	21,900	5,700	1,430	1,305	8,435	2.53
2046	23,700	6,040	1,515	1,605	9,160	2.51
2051	25,400	6,355	1,585	1,930	9,870	2.49
Incremental						
2016-2021	1,700	400	290	35	725	
2021-2031	4,400	965	380	390	1,735	
2021-2041	7,500	1,635	580	760	2,975	
2021-2051	11,000	2,290	735	1,385	4,410	

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached houses as well as “other” detached houses as per Statistics Canada.

³ Includes all townhouses and apartments in duplexes.

⁴ Includes all apartments with less than or greater than five storeys.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-3: St. George, Population and Housing Forecast, 2016 to 2051

Year	Population (Including Census Undercount) ¹	Households				Persons Per Unit (P.P.U.)
		Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	3,400	1,090	70	40	1,200	2.75
2021	3,500	1,155	70	40	1,265	2.69
2026	3,700	1,215	80	40	1,335	2.62
2031	4,300	1,395	115	40	1,550	2.65
2036	4,900	1,570	115	125	1,810	2.65
2041	6,000	1,795	175	265	2,235	2.60
2046	6,900	2,025	190	375	2,590	2.59
2051	7,500	2,125	210	515	2,850	2.56
Incremental						
2016-2021	100	65	-	-	65	
2021-2031	800	240	45	-	285	
2021-2041	2,500	640	105	225	970	
2021-2051	4,000	970	140	475	1,585	

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached house as well as “other” detached houses as per Statistics Canada.

³ Includes all townhouses and apartments in duplexes.

⁴ Includes all apartments with less than or greater than five storeys.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-4: Rural System, Population and Housing Forecast, 2016 to 2051

Year	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
		Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	21,800	7,155	115	60	7,330	2.88
2021	22,600	7,555	115	60	7,730	2.83
2026	23,400	7,905	115	60	8,080	2.81
2031	24,000	8,155	115	60	8,330	2.80
2036	24,700	8,430	140	60	8,630	2.78
2041	25,100	8,625	140	60	8,825	2.76
2046	25,400	8,770	145	60	8,975	2.75
2051	26,100	9,015	150	60	9,225	2.74
2016-2021	800	400	-	-	400	
2021-2031	1,400	600	-	-	600	
2021-2041	2,500	1,070	25	-	1,095	
2021-2051	3,500	1,460	35	-	1,495	

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached houses as well as “other” detached houses as per Statistics Canada.

³ Includes all townhouses and apartments in duplexes.

⁴ Includes all apartments with less than or greater than five storeys.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure C-5: Housing Forecast by Urban Growth Settlement Area and Rural System, 2016 to 2051

Year	Paris	St. George	Rural System	County of Brant
Total Households				
2016	4,735	1,200	7,330	13,265
2021	5,460	1,265	7,730	14,455
2026	6,365	1,335	8,080	15,775
2031	7,195	1,550	8,330	17,070
2036	7,855	1,810	8,630	18,290
2041	8,435	2,235	8,825	19,500
2046	9,160	2,590	8,975	20,725
2051	9,870	2,850	9,225	21,940
Share of 2016 County Households	36%	9%	55%	100%
Share of 2051 County Households	45%	13%	42%	100%
Housing Growth				
2016 - 2051	5,135	1,650	1,895	8,675
Annual Growth Rate, 2016 - 2051	2.1%	2.5%	0.7%	1.4%
Share of Household Growth, 2016 - 2051	59%	19%	22%	100%

Source: Watson & Associates Economists Ltd.



Appendix C-3: County of Brant Employment Forecasts by Urban Growth Settlement Area and Remaining Rural Area

Figure C-6: County of Brant Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	3,800	4,800	8,600	3,500	2,800	6,300	14,900	58%	42%
2021	4,300	5,300	9,600	3,500	3,000	6,500	16,100	60%	40%
2026	5,000	5,900	10,900	3,600	3,000	6,600	17,600	62%	38%
2031	5,700	6,500	12,200	3,700	3,100	6,800	19,000	64%	36%
2036	6,500	7,200	13,600	3,700	3,200	6,900	20,600	66%	34%
2041	7,300	7,900	15,200	3,800	3,300	7,100	22,300	68%	32%
2046	8,100	8,700	16,800	3,800	3,500	7,300	24,100	70%	30%
2051	8,900	9,600	18,500	3,900	3,600	7,500	26,000	71%	29%
Incremental Growth									
2016 - 2021	500	500	1,000	0	100	200	1,200	85%	15%
2016 - 2026	1,200	1,100	2,400	100	200	300	2,700	89%	11%
2016 - 2031	1,900	1,700	3,700	200	300	400	4,100	89%	11%
2016 - 2036	2,700	2,400	5,100	200	400	600	5,700	89%	11%
2016 - 2041	3,500	3,100	6,600	300	500	800	7,400	89%	11%
2016 - 2046	4,300	3,900	8,200	300	700	1,000	9,200	89%	11%
2016 - 2051	5,100	4,800	9,900	400	800	1,200	11,100	89%	11%

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure C-7: Paris Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	3,300	4,100	7,400	0	0	0	7,400	100%	0%
2021	3,800	4,500	8,300	0	0	0	8,300	100%	0%
2026	4,500	5,100	9,600	0	0	0	9,600	100%	0%
2031	5,100	5,600	10,700	0	0	0	10,700	100%	0%
2036	5,800	6,100	11,900	0	0	0	11,900	100%	0%
2041	6,500	6,500	13,100	0	0	0	13,100	100%	0%
2046	7,200	7,100	14,300	0	0	0	14,300	100%	0%
2051	7,900	7,600	15,500	0	0	0	15,500	100%	0%
Incremental Growth									
2016 - 2021	500	400	900	0	0	0	900	100%	0%
2016 - 2026	1,200	1,000	2,200	0	0	0	2,200	100%	0%
2016 - 2031	1,800	1,500	3,300	0	0	0	3,300	100%	0%
2016 - 2036	2,500	2,000	4,400	0	0	0	4,400	100%	0%
2016 - 2041	3,200	2,400	5,600	0	0	0	5,600	100%	0%
2016 - 2046	3,900	3,000	6,900	0	0	0	6,900	100%	0%
2016 - 2051	4,600	3,500	8,100	0	0	0	8,100	100%	0%

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-8: St. George Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	500	700	1,200	0	0	0	1,200	100%	0%
2021	500	700	1,200	0	0	0	1,200	100%	0%
2026	500	800	1,300	0	0	0	1,300	100%	0%
2031	600	900	1,500	0	0	0	1,500	100%	0%
2036	700	1,100	1,800	0	0	0	1,800	100%	0%
2041	800	1,400	2,200	0	0	0	2,200	100%	0%
2046	900	1,600	2,500	0	0	0	2,500	100%	0%
2051	1,000	1,900	3,000	0	0	0	3,000	100%	0%
Incremental Growth									
2016 - 2021	0	0	100	0	0	0	100	100%	0%
2016 - 2026	100	100	200	0	0	0	200	100%	0%
2016 - 2031	100	200	300	0	0	0	300	100%	0%
2016 - 2036	200	400	600	0	0	0	600	100%	0%
2016 - 2041	300	700	1,000	0	0	0	1,000	100%	0%
2016 - 2046	400	900	1,400	0	0	0	1,400	100%	0%
2016 - 2051	500	1,200	1,800	0	0	0	1,800	100%	0%

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure C-9: Rural System Employment Forecast, 2016 to 2051

Year	Urban Growth Settlement Area			Rural System			Total	Urban System %	Rural System %
	Urban E.L.E.	Urban P.R.E.	Total Urban System Employment	Rural E.L.E.	Other Rural	Total Rural System Employment			
	A	B	C = A + B	D	E	F = D + E	G = C + F	H = B / G	I = F / G
Total									
2016	0	0	0	3,500	2,800	6,300	6,300	0%	100%
2021	0	0	0	3,500	3,000	6,500	6,500	0%	100%
2026	0	0	0	3,600	3,000	6,600	6,600	0%	100%
2031	0	0	0	3,700	3,100	6,800	6,800	0%	100%
2036	0	0	0	3,700	3,200	6,900	6,900	0%	100%
2041	0	0	0	3,800	3,300	7,100	7,100	0%	100%
2046	0	0	0	3,800	3,500	7,300	7,300	0%	100%
2051	0	0	0	3,900	3,600	7,500	7,500	0%	100%
Incremental Growth									
2016 - 2021	0	0	0	0	100	200	200	0%	100%
2016 - 2026	0	0	0	100	200	300	300	0%	100%
2016 - 2031	0	0	0	200	300	400	400	0%	100%
2016 - 2036	0	0	0	200	400	600	600	0%	100%
2016 - 2041	0	0	0	300	500	800	800	0%	100%
2016 - 2046	0	0	0	300	700	1,000	1,000	0%	100%
2016 - 2051	0	0	0	400	800	1,200	1,200	0%	100%

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.



Appendix C-10: County of Brant Employment by Urban Growth Settlement Area and Rural System, 2051

Year	Paris	St. George	Rural System	County of Brant
Total Employment				
2016	7,400	1,200	6,300	14,900
2021	8,300	1,200	6,500	16,100
2026	9,600	1,300	6,600	17,600
2031	10,700	1,500	6,800	19,000
2036	11,900	1,800	6,900	20,600
2041	13,100	2,200	7,100	22,300
2046	14,300	2,500	7,300	24,100
2051	15,500	3,000	7,500	26,000
Share of 2016 Employment	50%	8%	42%	100%
Share of 2051 Employment	60%	11%	29%	100%
Employment Growth				
2016 - 2051	8,100	1,800	1,200	11,100
Annual Growth Rate, 2016 to 2051	2%	3%	0%	2%
Share of Employment Growth, 2016 to 2051	73%	16%	11%	100%

Note: Figures may not add precisely due to rounding.
 Source: Watson & Associates Economists Ltd.



Appendix C-4: County of Brant Employment Forecasts by Employment Location Type

Figure C-11
County of Brant
Employment by Type and Location Type, 2021

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,300	0	0	5,300	33%
Urban Community Areas	4,200	0	0	0	4,200	26%
Rural Employment Areas	0	0	3,600	300	3,900	24%
Other Rural	0	0	0	2,700	2,700	17%
Total	5,200	4,300	3,600	3,000	16,100	100%
Share (%)	32%	27%	22%	19%	100%	

Source: Watson & Associates Economists Ltd.

Figure C-12
County of Brant
Employment by Type and Location Type, 2051

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	2,000	9,000	0	0	11,000	42%
Urban Community Areas	7,500	0	0	0	7,500	29%
Rural Employment Areas	0	0	3,900	400	4,300	17%
Other Rural	0	0	0	3,400	3,400	12%
Total	9,500	9,000	3,900	3,800	26,000	100%
Share (%)	37%	35%	15%	14%	100%	

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-13
County of Brant
Employment by Type and Location Type, 2021 – 2051

Location Type	Urban P.R.E.	Urban E.L.E.	Rural E.L.E.	Other Rural	Total	Share (%)
Urban Employment Areas	1,000	4,700	0	0	5,700	58%
Urban Community Areas	3,300	0	0	0	3,300	33%
Rural Employment Areas	0	0	300	100	400	4%
Other Rural	0	0	0	700	700	5%
Total	4,300	4,700	300	800	9,900	100%
Share (%)	44%	47%	3%	6%	100%	

Note: Figures may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure C-14
County of Brant
Paris and St. George Urban Employment Areas
Employment by Type and Location Type by 2051

Urban Employment Areas	Paris Employment Areas	St. George Employment Areas	Urban Employment Area: Paris & St. George (Rounded)
Developed			
Employment	4,700	560	5,300
Employment Lands Employment (Industrial-Type)	3,720	500	4,200
Population-Related Employment (Commercial/Institutional)	980	60	1,000
Land Area, Gross ha	313	43	400
Density (jobs/ha)	15	13	13
Employment Area, % E.L.E.	79%	89%	79%
Employment Area, % P.R.E.	21%	11%	19%
2021 - 2051			
Employment	5,125	600	5,700
Employment Lands Employment (Industrial-Type)	4,150	540	4,700
Population-Related Employment (Commercial/Institutional)	975	60	1,000
Land Area, ha	342	46	388
Density	15	13	15
Employment Area, % E.L.E.	81%	90%	82%
Employment Area, % P.R.E.	19%	10%	18%
2051			
Employment	9,825	1,160	11,000
Employment Lands Employment (Industrial-Type)	7,870	1,040	8,900
Population-Related Employment (Commercial/Institutional)	1,955	120	2,100
Employment Area, % E.L.E.	80%	90%	81%
Employment Area, % P.R.E.	20%	10%	19%

Source: Watson & Associates Economists Ltd.

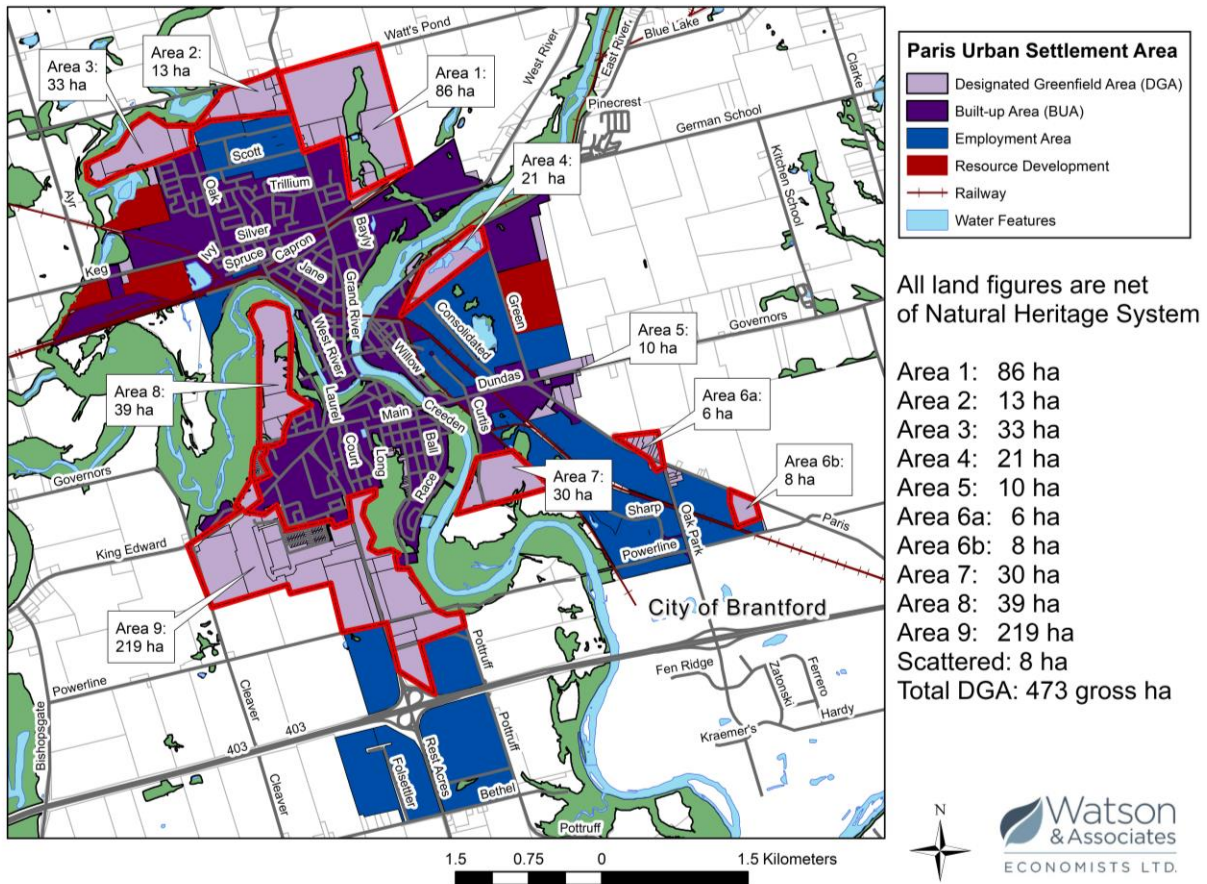


Appendix D

Community Area Land Supply Maps and Tables



Appendix D-1: Paris Community Area D.G.A. Land Area, Gross ha



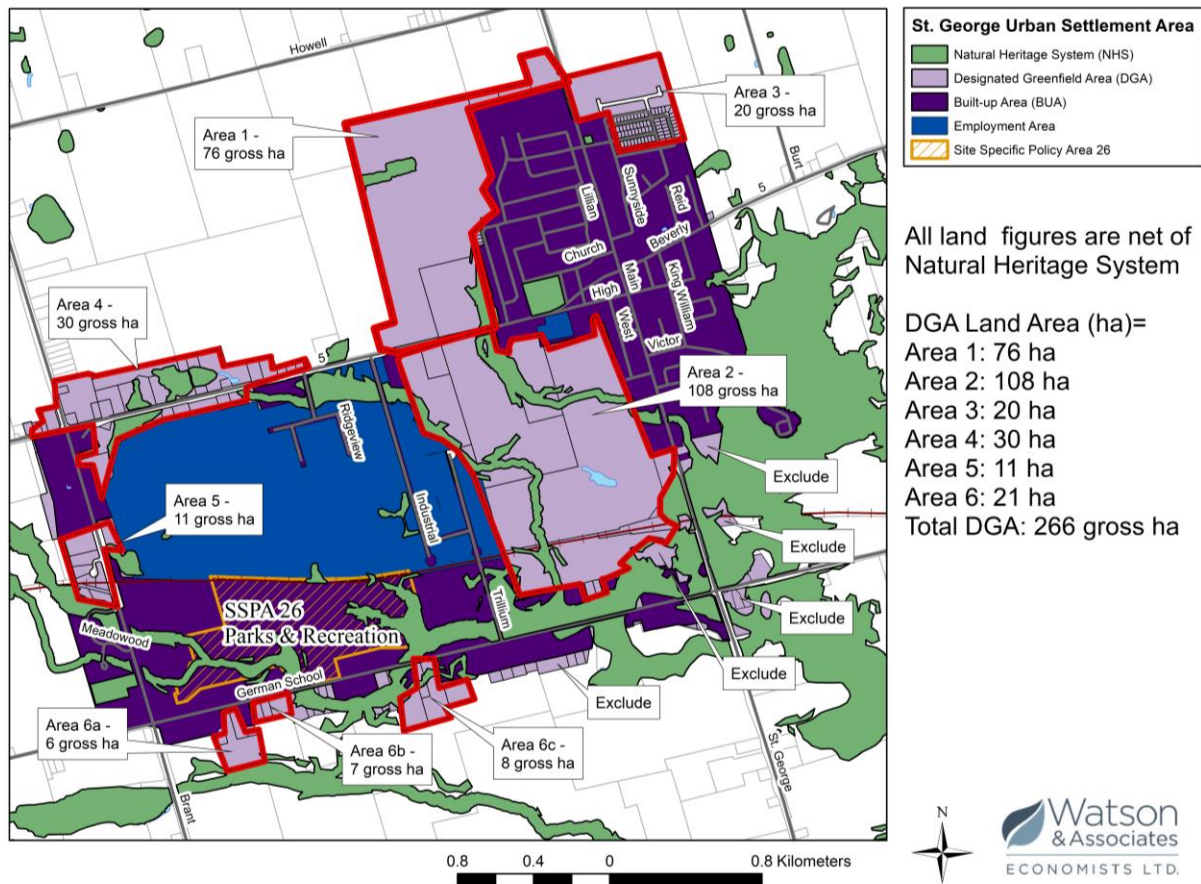
The D.G.A. within Paris has a total developable land area of 473 gross ha.

Land area, based on the total designated land area in the D.G.A., includes developed lands, vacant lands, parks/recreational lands and non-residential lands (except Employment Area lands).

Land area excludes Natural Heritage Systems, highways, utilities corridors and Employment Areas.



Appendix D-2: St. George Community Area D.G.A. Land Area, Gross ha



The D.G.A. within St. George has a total developable land area of 266 gross ha.

Land area, based on the total designated land area in the D.G.A., includes developed lands, vacant lands, parks/recreational lands and non-residential lands (except Employment Area lands).

Land area excludes Natural Heritage Systems, highways, utilities corridors and Employment Areas.



Appendix D-3: D.G.A. Developed and Approved Analysis

Paris

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	312	99	0	411	45	1,270	1,740	39
Draft Approved/Registered	1,712	612	919	3,243	167	8,850	9,100	55
Developed & Draft Approved/Registered	2,024	711	919	3,654	211	10,120	10,840	51

St. George

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed	105	0	0	105	9	350	365	39
Draft Approved/Registered	1,957	232	592	2,781	160	8,100	8,380	52
Developed & Draft Approved/Registered	2,062	232	592	2,886	169	8,450	8,745	52

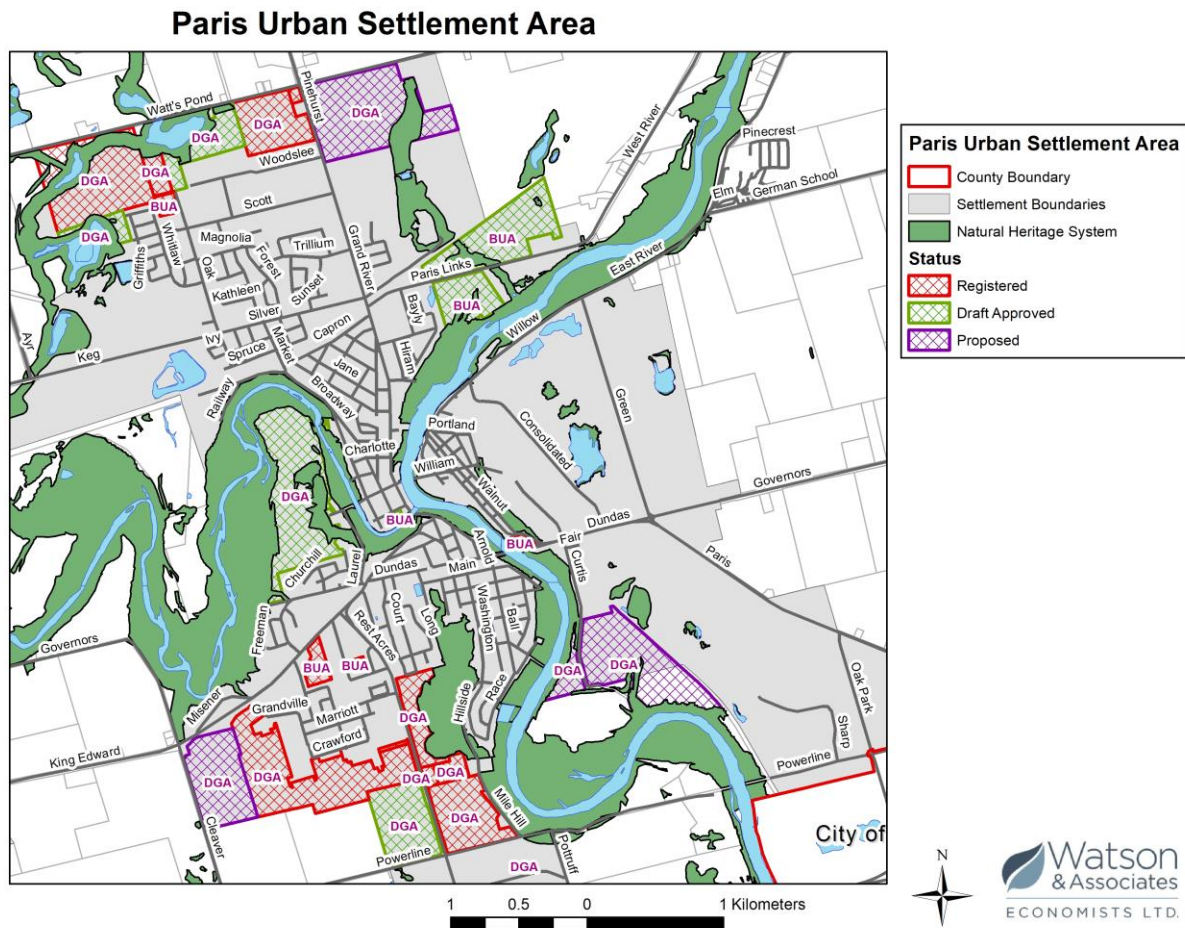
Paris & St. George

Status	Low Density	Medium Density	High Density	Total Dwellings	Total Land Area, ha	Estimated Population	Estimated Population & Jobs	People & Jobs/ha Density
Developed - Paris and St. George	417	99	0	516	54	1,620	2,100	39
Draft Approved/Registered	3,669	844	1,511	6,024	326	16,950	17,500	54
Developed & Draft Approved/Registered	4,086	943	1,511	6,540	380	18,570	19,600	52

Source: Watson & Associates Economists Ltd.



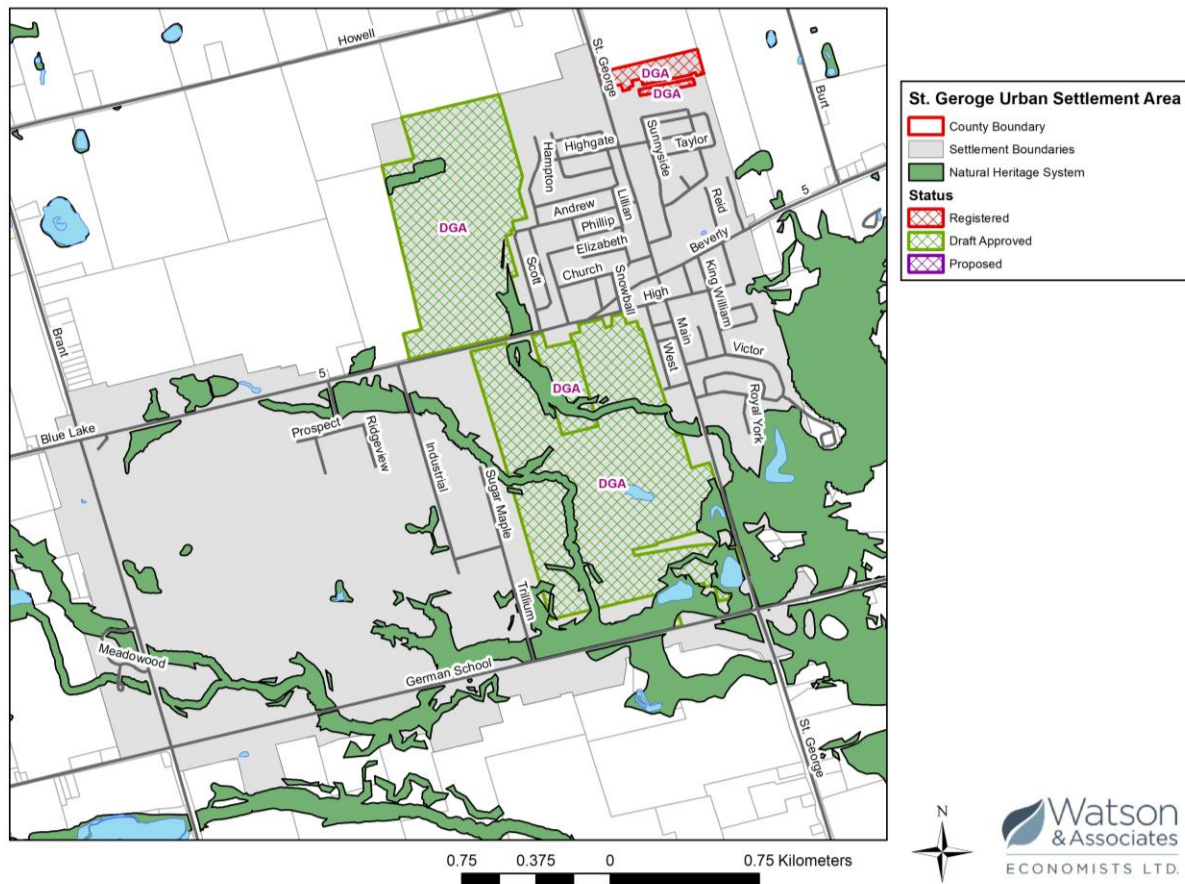
Appendix D-4: Active Residential Development in Paris (D.G.A./B.U.A.)



Map identifies the approximate land area of sites with residential development applications that are currently in the planning process, including approved and proposed developments.



Appendix D-5: Active Residential Development in St. George (D.G.A./B.U.A.)



Map identifies the approximate land area of sites with residential development applications currently in the planning process, including approved and proposed developments.

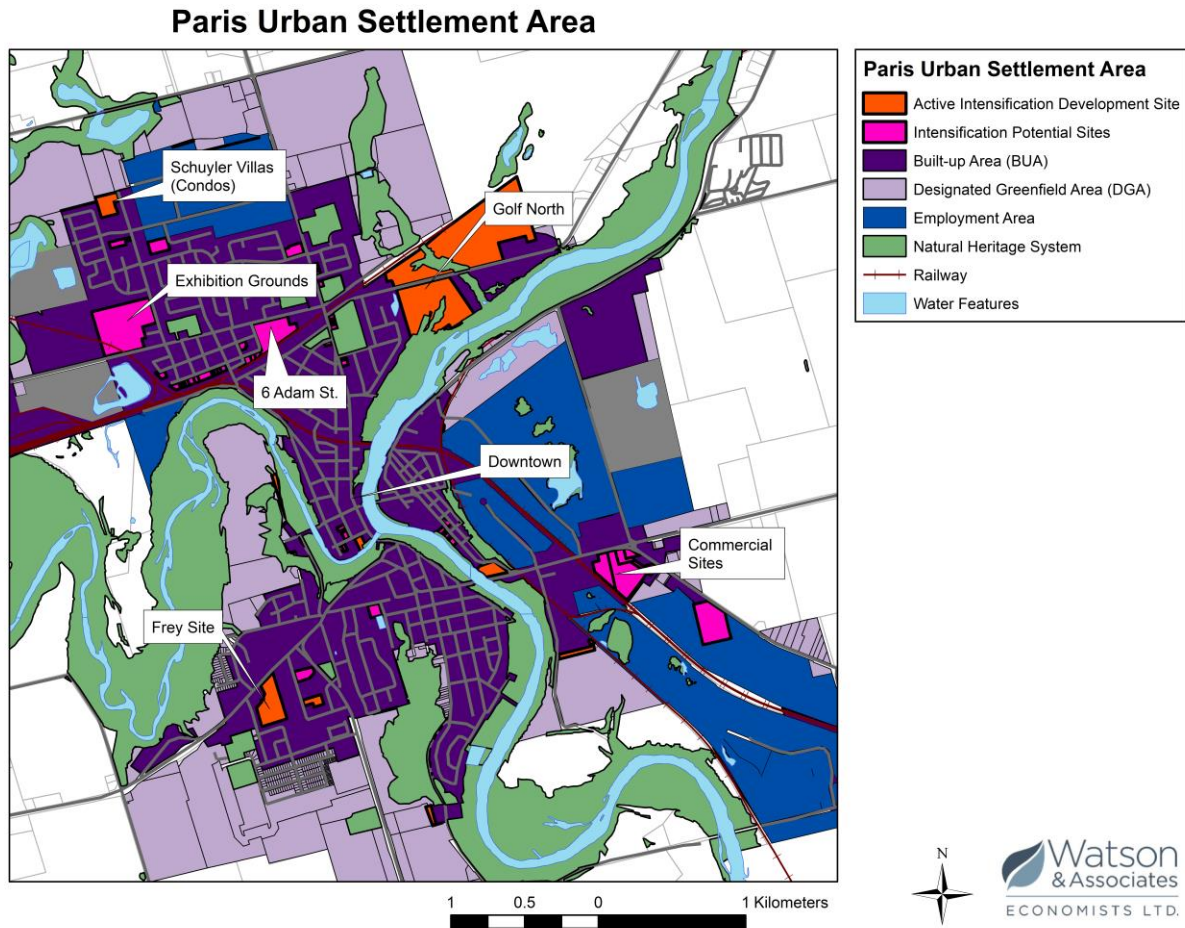


Appendix E

Intensification Opportunities to Accommodate Housing in Paris and St. George

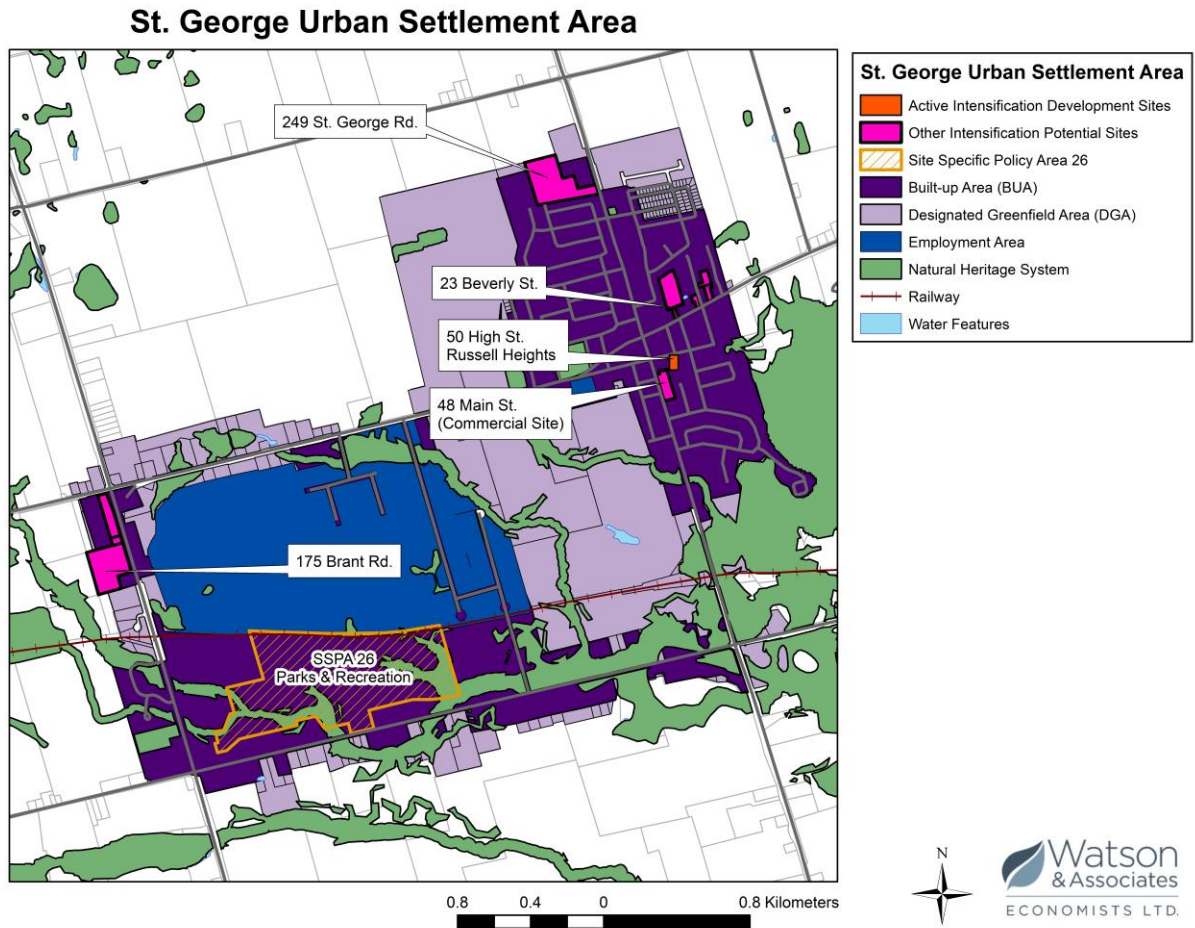


Appendix E-1: Intensification Opportunities to Accommodate Housing in Paris





Appendix E-2: Intensification Opportunities to Accommodate Housing in St. George





Appendix F

Commercial Built-Space Inventory in Paris and St. George



Appendix F-1: Commercial Built-Space Inventory in Paris

Dundas St./Paris Rd. Corridor

Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
34 Paris Rd	Vacant Building	Vacant	Vacant	700	0.01	0.5	1%	0	0
74 & 82 Dundas St	Harveys and Swiss Chalet	Food Services	Free-Standing	8,200	0.08	2.2	3%	20	9
30 Paris Rd	Paris Country Grill & Wine	Food Services	Free-Standing	2,900	0.03	0.7	4%	10	15
772 Governors Rd E	Furniture Store and Art Studio	Furniture Store	Free-Standing	4,000	0.04	0.7	5%	10	14
22 Paris Rd	Camp 31	Food Services	Free-Standing	2,300	0.02	0.3	6%	10	29
151 Dundas St. E	Tim Horton's	Food Services	Free-Standing	2,500	0.02	0.3	7%	10	29
156 Dundas St	EggsMart	Food Services	Free-Standing	1,900	0.02	0.2	7%	5	21
135 & 203 Dundas St E	Cardlock	Automotive Sales & Services	Free-Standing	7,700	0.07	0.7	10%	1	1
142 Dundas St E	Paris Factory Rides Automotive	Automotive Sales & Services	Free-Standing	5,600	0.05	0.4	12%	10	24
103 Dundas St E	Dealership	Automotive Sales & Services	Free-Standing	11,100	0.10	0.8	13%	30	40
15 Paris Rd	Motel	Accommodations	Free-Standing	6,700	0.06	0.4	16%	20	53
123 Dundas St E	Auto Service	Automotive Sales & Services	Free-Standing	2,900	0.03	0.2	16%	10	55
127 Dundas St E	Esso Gas Station	Automotive Sales & Services	Free-Standing	1,900	0.02	0.1	18%	2	18
65 Dundas St	PrimaCare Community Family H	Health Care	Medical Clinic	14,700	0.14	0.6	22%	40	65
12 Paris Rd	Rose Court Motel	Accommodations	Other	4,800	0.04	0.2	26%	5	29
71 Dundas St	No Frills	Food Store	Free-Standing	30,000	0.28	1.0	27%	80	76
72 Dundas St	Starbucks	Food Services	Free-Standing	3,000	0.03	0.1	28%	10	99
535 Paris Road	Brantford Granite & Quartz	Building Supplies Stores	Free-Standing	28,800	0.27	1.0	27%	20	20
sub-Total				139,700	1	10	12%	293	28



Paris Downtown Core

Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
121 Grand River St. N	Vacant Building	Vacant	Vacant Storefront	800	0.01	0.1	15%	0	0
120 Grand River St. N	Dental Office	Health Care	Medical Clinic	4,000	0.04	0.2	20%	10	53
139 Grand River St. N	Medical Clinic	Health Care	Medical Clinic	9,800	0.09	0.5	20%	20	44
25 Mechanic Street	LCBO	Beer, Wine & Liquor Store	Free-Standing	5,500	0.05	0.2	21%	10	41
127 Grand River St. N	Vacant Building	Vacant	Vacant Storefront	1,100	0.01	0.0	26%	0	0
138 Grand River St. N	Spa	Personal Services	Other	3,400	0.03	0.1	35%	10	111
The Paris Wincey Mills	Mixed-Use Complex	Office	Mixed-Use Complex	31,000	0.29	0.7	38%	60	80
105 - 119 Grand River St	6 Storefronts	Various	Storefront	7,700	0.07	0.2	40%	20	111
19, 21, 23, 27, 29 & 33 W	Storefronts	Various	Storefront	12,700	0.12	0.2	49%	30	124
106 Grand River St N	Arlington Hotel	Accommodations	Hotel	7,200	0.07	0.1	57%	5	43
86, 80, 72 & 68 Grand Ri	Storefronts	Various	Storefront	17,600	0.16	0.2	65%	40	161
1 to 97 Grand River St N	Storefronts	Various	Storefront	42,800	0.39	0.6	71%	90	164
66 Grand River St N	Brant County Office	Institutional Use in Retail	Institutional	18,300	0.07	0.1	79%	40	449
30, 32, 38, 40, 44, 48, 50	Storefronts	Various	Storefront	19,700	0.18	0.2	93%	40	207
6, 8, 10, 14, 16, 20, 24 &	Storefronts	Various	Storefront	15,900	0.15	0.2	98%	30	197
				197,500	1.72	4	48%	405	113

Grand River St. N. Corridor

Node	Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
Grand River St. N.	340 Grand River St. N (E	Car Wash & Pizza Restaurant	Food Services/Automotive Services	Free-Standing	4,700	0.0	0.6	7%	5	8
Grand River St. N.	304 Grand River St. N (E	Tim Horton's	Food Services	Free-Standing	2,500	0.0	0.2	9%	10	45
Grand River St. N.	308 Grand River St. N (E	Employment Area Land Site)	Food Services	Plaza	5,900	0.0	0.1	38%	10	167
Grand River St. N.	307 Grand River St. N	McDonalds	Food Services	Free-Standing	3,500	0.0	0.3	12%	10	38
Grand River St. N.	303 Grand River St. N	Dollarama	General Merchandise	Free-Standing	10,500	0.1	0.7	14%	11	16
Grand River St. N.	184 Grand River St. N	Funeral Home	Other	Other	5,000	0.05	0.3	15%	5	16
Grand River St. N.	279 Grand River St. N	Shell	Automotive Sales & Services	Free-Standing	2,500	0.0	0.2	15%	2	13
Grand River St. N.	246 & 248 Grand River S	Home Building Centre	Building Supplies Stores	Free-Standing	11,800	0.11	0.5	20%	30	56
Grand River St. N.	280 & 300 Grand River S	Canadian Tire	General Merchandise	Plaza	66,500	0.6	2.4	26%	130	54
Grand River St. N.	321 Grand River St. N	Paris Vet Clinic	Professional Services	Office	5,500	0.1	0.2	27%	10	52
Grand River St. N.	271 Grand River St. N	Subway	Food Services	Plaza	5,100	0.05	0.1	36%	16	114
Grand River St. N.	315 Grand River St. N	Sobeys	Food Store	Free-Standing	51,000	0.5	1.3	37%	100	78
Grand River St. N. - sub-Total, including commercial sites on designated Employment Area Lands					174,500	2	7	23%	339	49
Grand River St. N. - sub-Total, excluding commercial sites on designated Employment Area Lands					161,400	1.50	6	25%	314	52



Other

Node	Building Address	Largest Tenant of Building	Use Type	Building Type	G.L.A., Sq.ft.	Building Space	Site Land Area, ha	Building Coverage	Estimated Employment	Employment Density (jobs/ha)
Dumfries St.	27 Dumfries St.	The Grand Bayou Cajun Kitcher	Food Services	Free-Standing	3,700	0.03	0.2	19%	3	17
Dumfries St.	28 Dumfries St.	KFC	Food Services	Free-Standing	2,000	0.02	0.1	31%	10	167
Dumfries St.	53 Dumfries St.	Vacant Building	Vacant		4,900	0.05	0.1	50%	0	0
Other	93 King Edward St	Gas Station	Automotive Sales & Services	Free-Standing	2,500	0.02	0.5	5%	2	4
Other	1105 Rest Acres Rd	Funeral Home	Other	Other	7,700	0.07	0.8	9%	10	13
Other	14 Market St.	Wrights Variety Store	Convenience Store	Free-Standing	4,000	0.04	0.2	22%	2	12
Other	32 Dundas St W	Little Paris Bread	Food Services	Storefront	2,000	0.02	0.1	25%	5	63
Other	3 Elm St	Restaurant & Office	Food Services	Office	15,000	0.10	0.3	34%	40	138
Other	7 Market St.	Titos Pizza	Food Services	Free-Standing	1,000	0.04	0.1	64%	5	86
Other	1 Grand River St. N	Wendy's General Store	Convenience Store	Free-Standing	3,300	0.03	0.0	77%	2	50
Other - sub-Total					46,100	0.42	2.20	19%	79	36
Rest Acres Rd.	1084 Rest Acres Rd	Cobblestone Pharmacy/Dental/N	Health Care	Plaza	40,800	0.38	1.5	26%	75	51
Rest Acres Rd.					40,800	0.38	1	26%	75	51
Total	Total Commercial Building Space, Sq.ft. (G.L.A.)				585,500	4.90	22	23%	1,170	54

Source: Watson & Associates Economists Ltd. Employment data derived from InfoCanada Business Directory.



Appendix F-2: Commercial Built-Space Inventory in St. George

Corridor	Largest Tenant of Building	G.L.A., Sq.ft.
Brant Rd.	Tim Hortons	2,600
Brant Rd.	Gas Station	1,000
Brant Rd.	Gas Station	1,000
Brant Rd.	Southern Pride Poultry	3,100
Brant Rd.	Ken's Auto	6,000
Brant Rd. sub-Total		13,700
Core	Foodland	12,000
Core	Esso Gas Station	1,000
Core	BMO Bank	2,500
Core	Auto Repair	3,600
Core	Car Wash	3,500
Core	Storefronts	9,700
Core	Storefronts	13,100
Core	2 Converted Houses	6,000
Core	41 Main St. Complex	5,000
Core	Plaza	11,000
Core	Plaza	4,300
Core	Plaza	4,500
Core sub-Total		76,200
Total St. George		89,900

Source: Watson & Associates Economists Ltd.

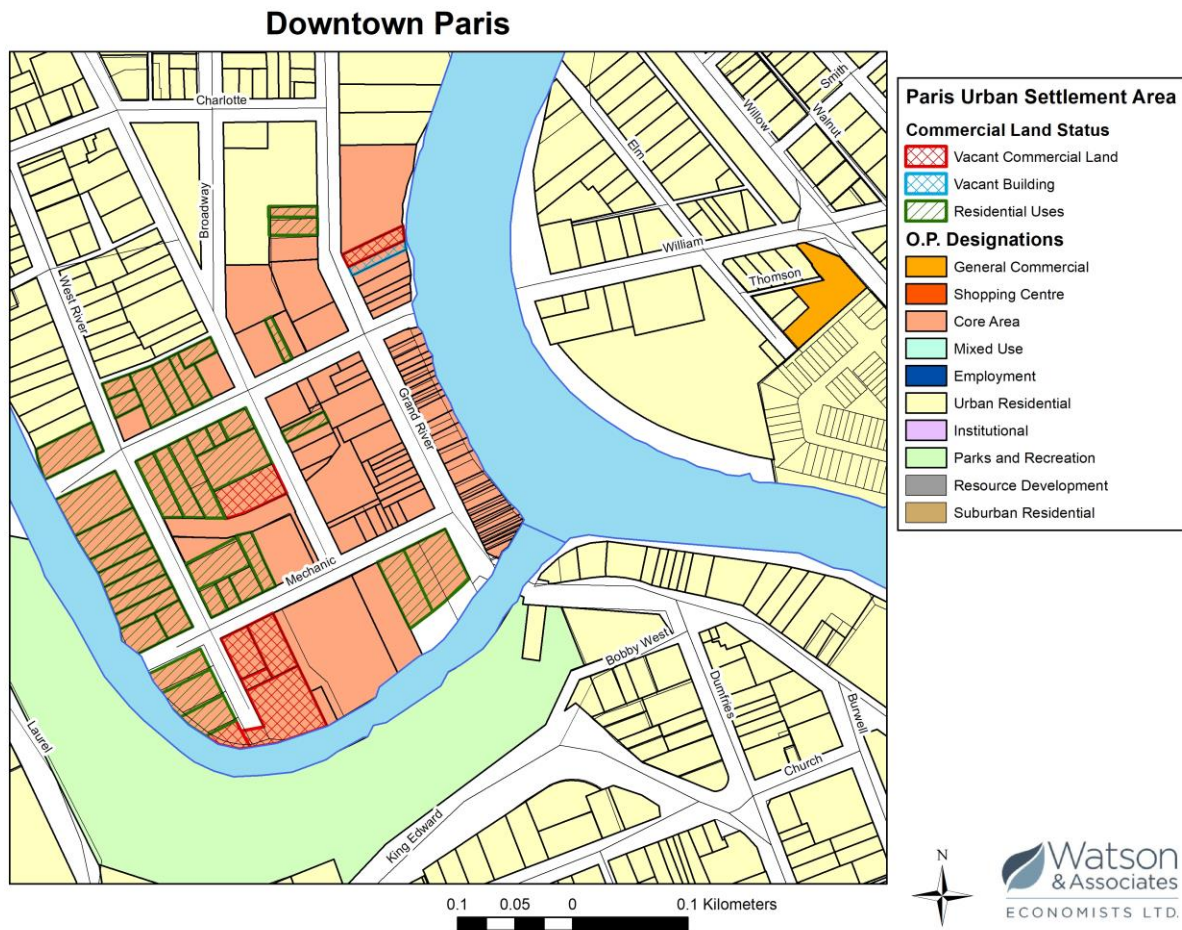


Appendix G

Designated Commercial Land Supply



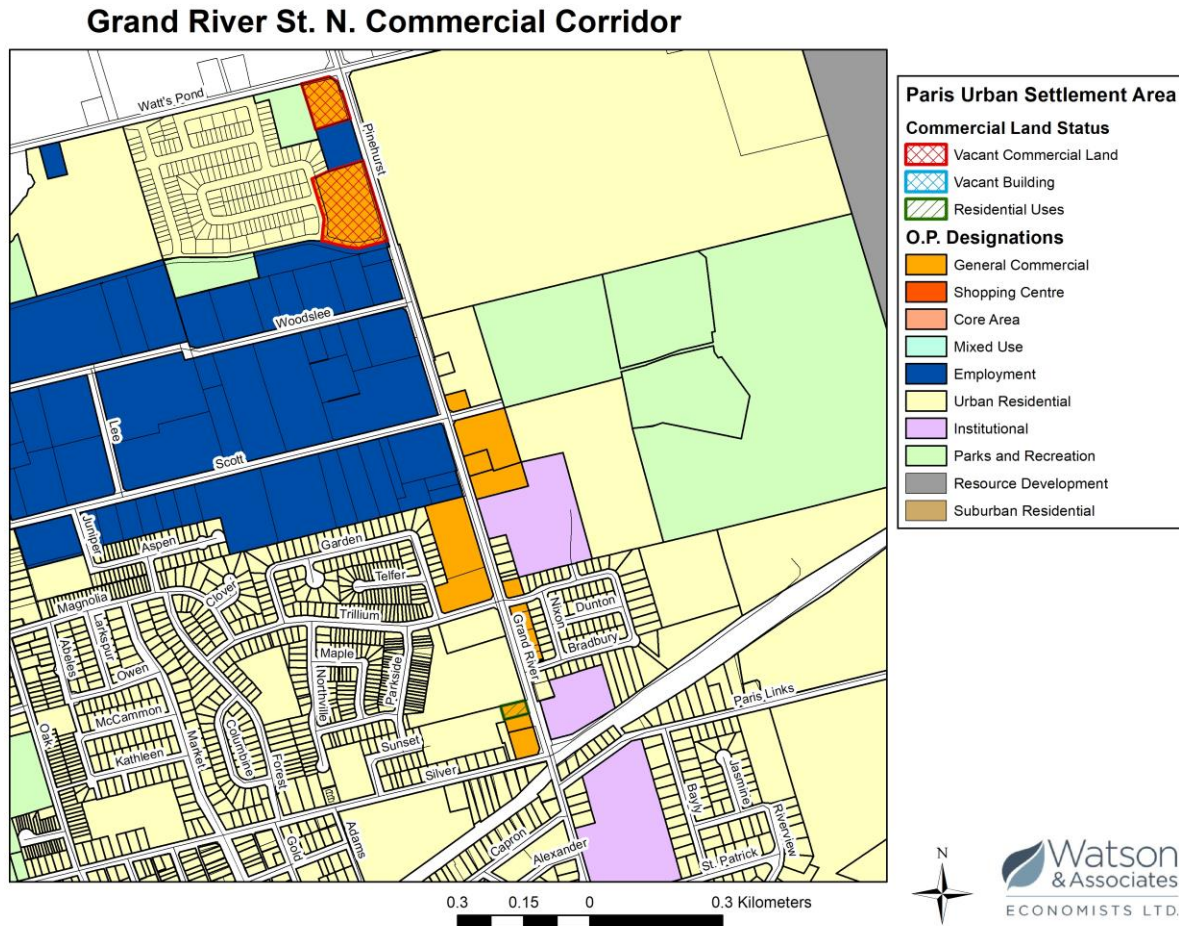
Appendix G-1: Designated Commercial Land Supply in Downtown Paris by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix G-2: Designated Commercial Land Supply in Grand River St. N. Corridor by Status

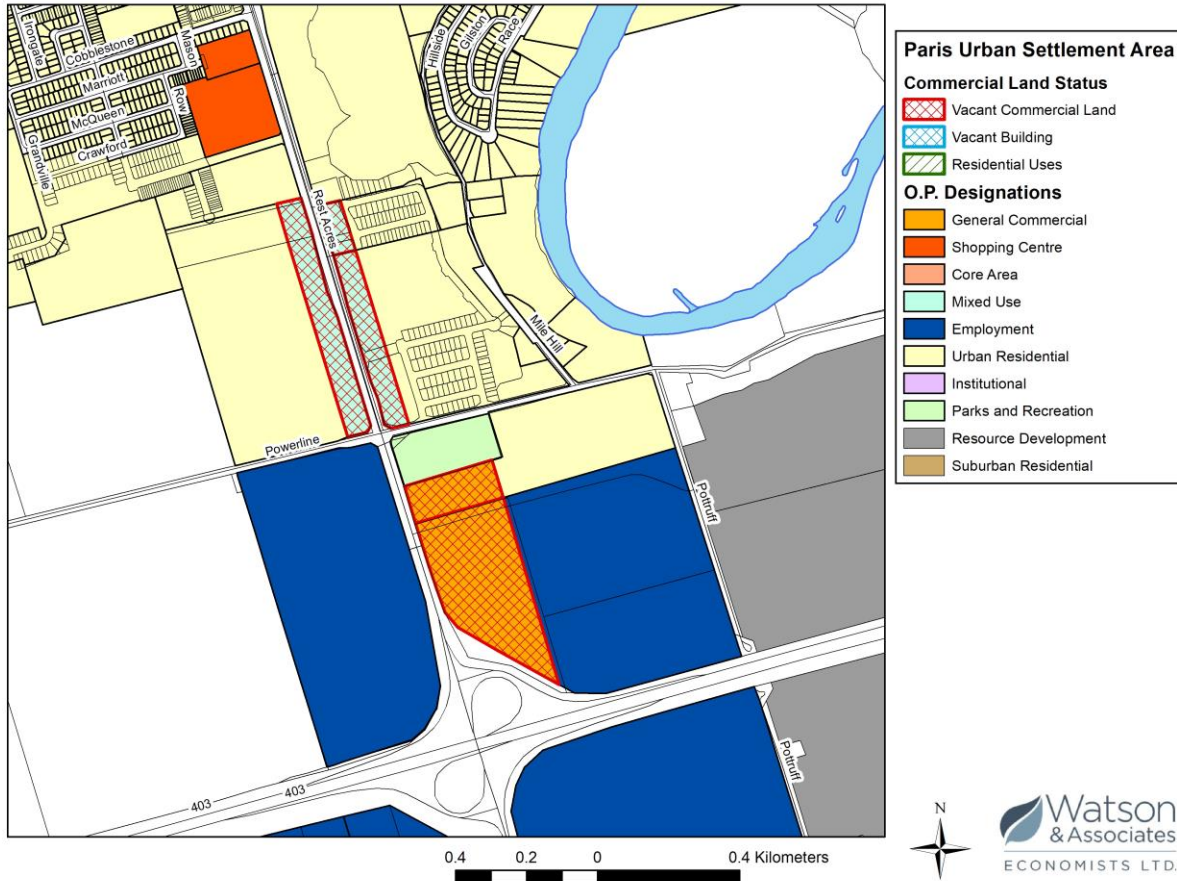


Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix G-3: Designated Commercial Land Supply in Rest Acres Road Corridor by Status

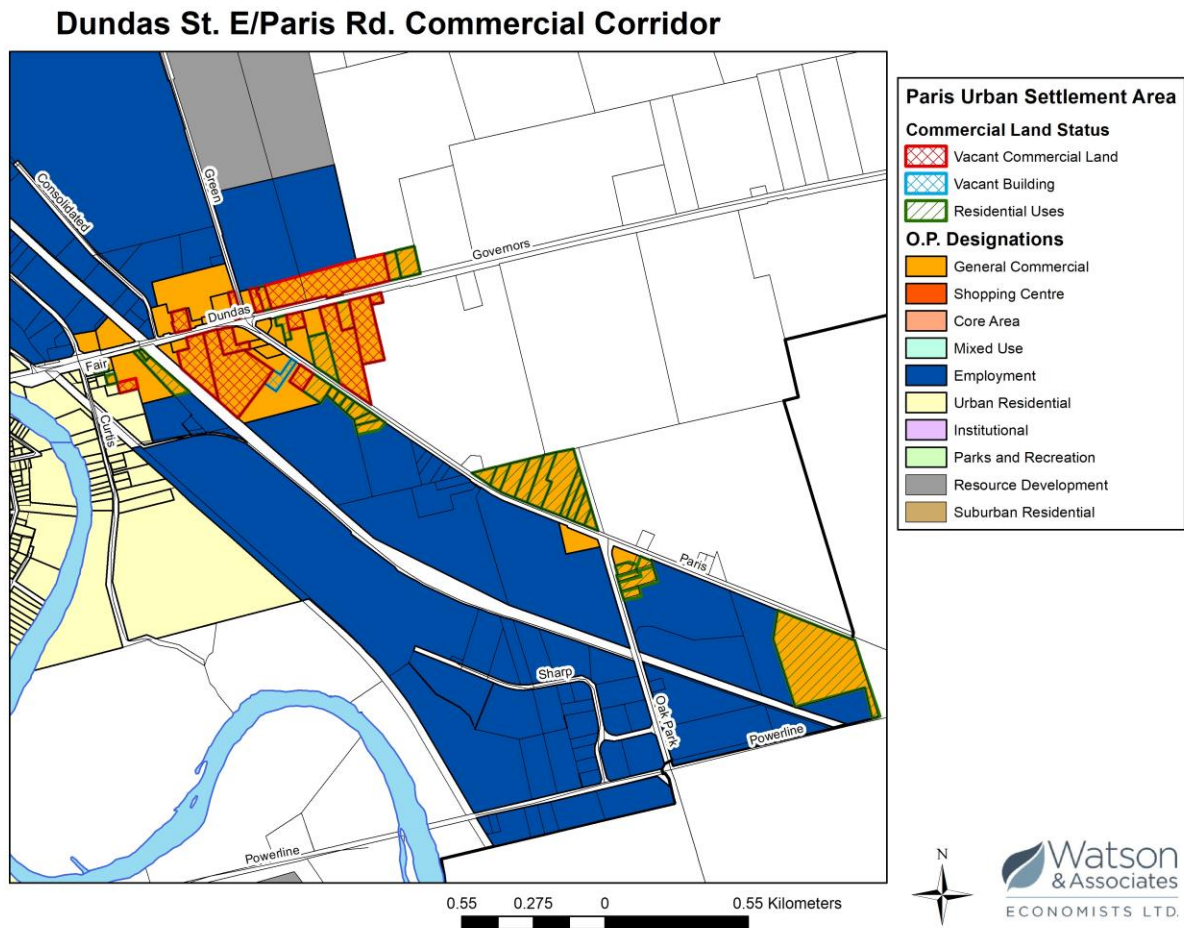
Rest Acres Rd. Commercial Corridor



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



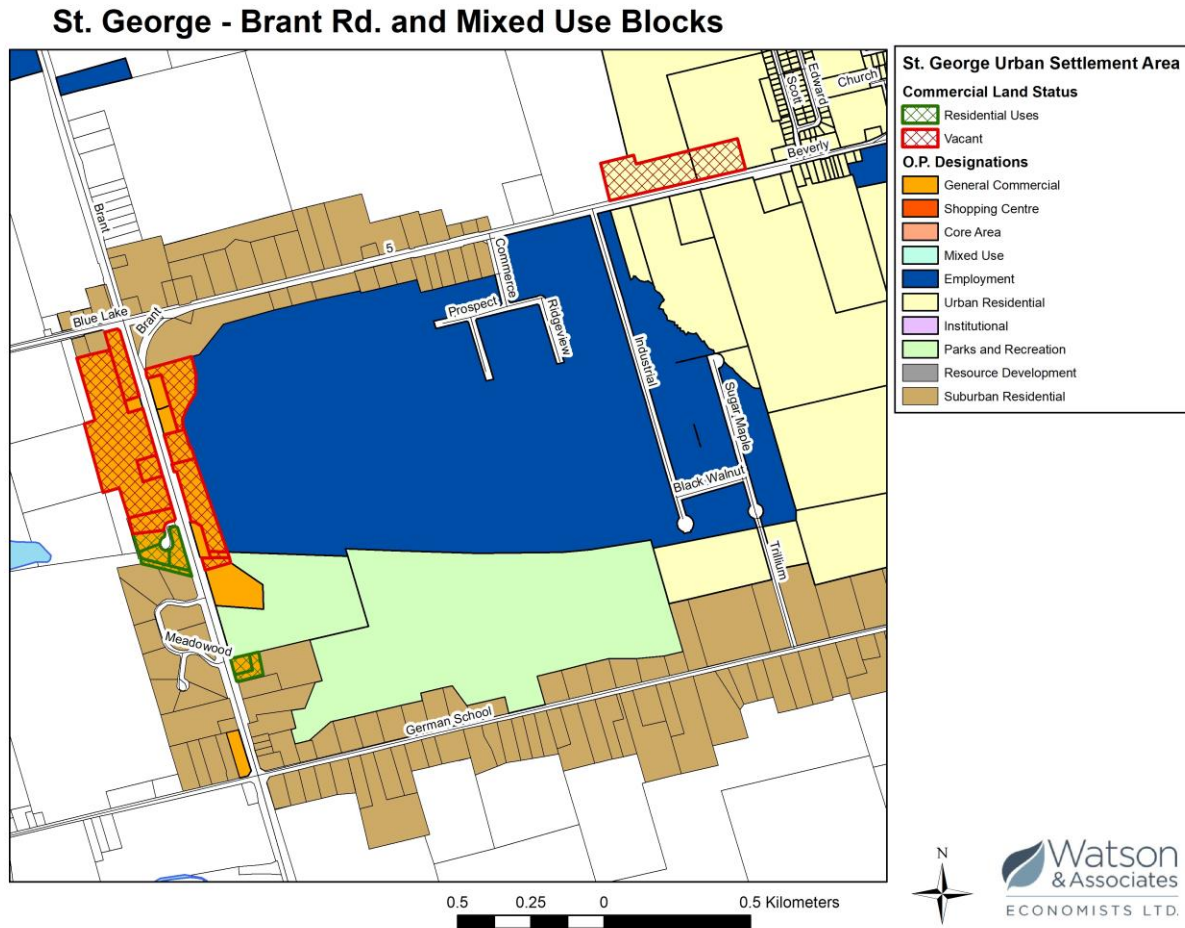
Appendix G-4: Designated Commercial Land Supply in Dundas Rd. and Paris Rd. Corridor by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



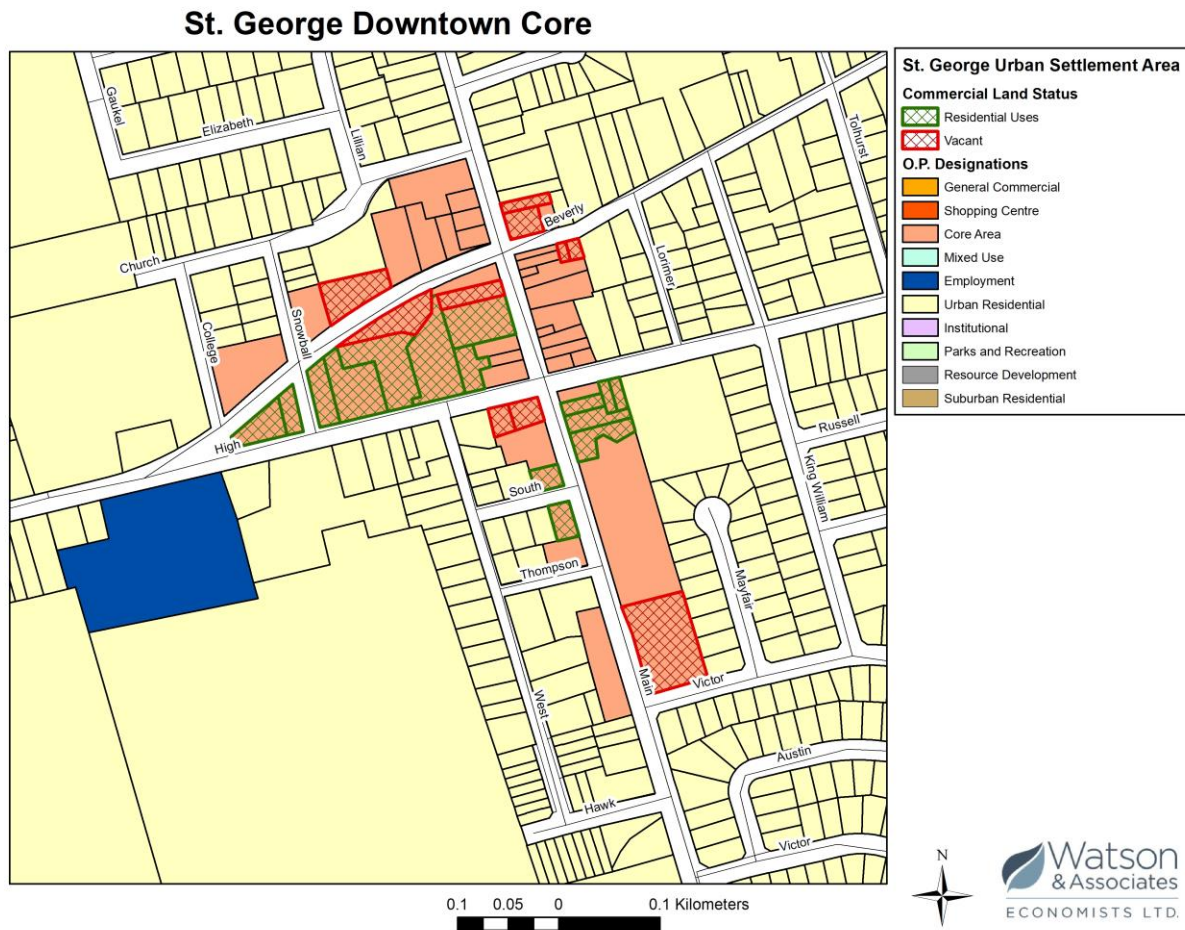
Appendix G-5: Designated Commercial Land Supply in Brant Road Corridor by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix G-6: Designated Commercial Land Supply in St. George Core by Status



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



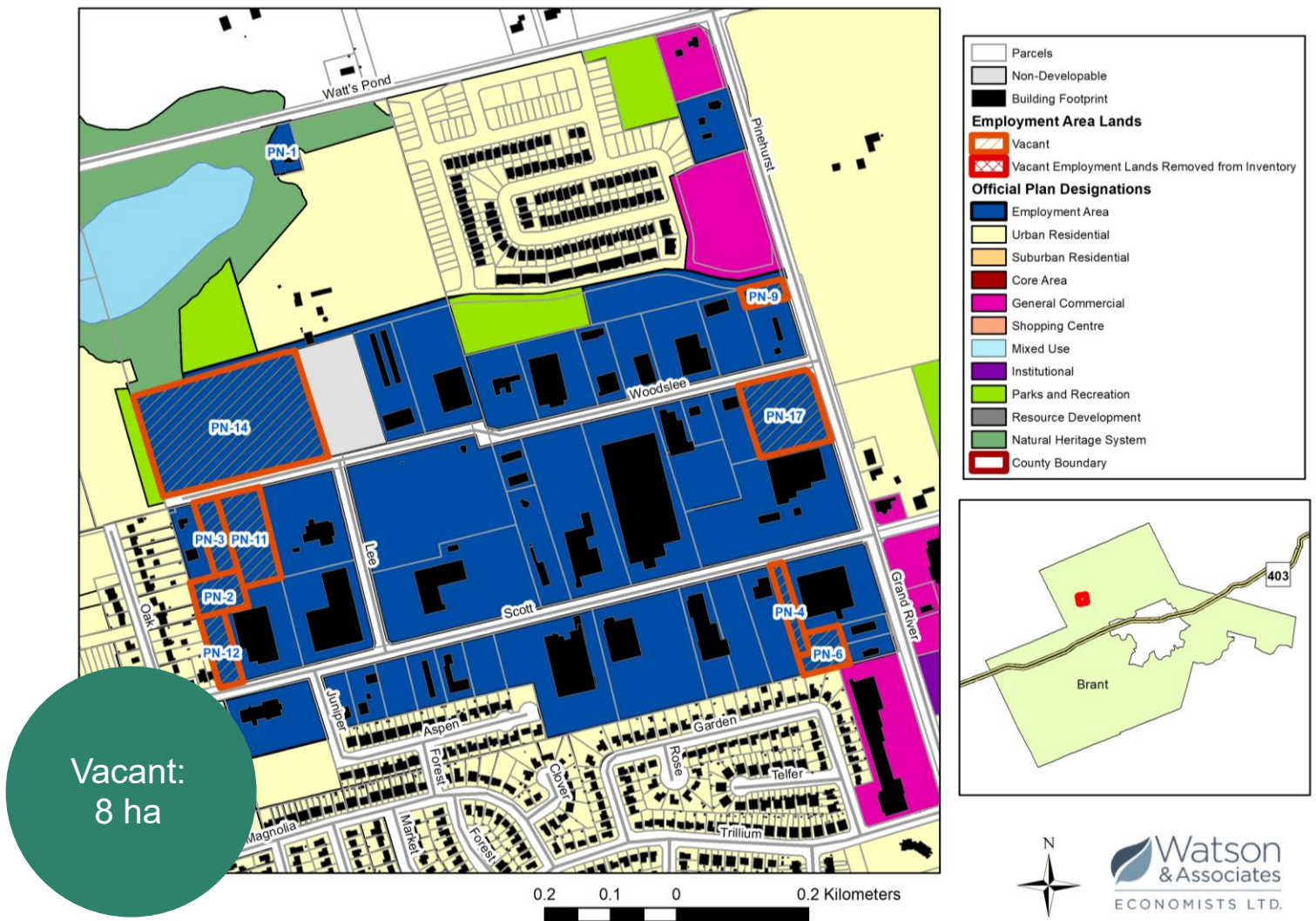
Appendix H

Urban Employment Area Developed and Vacant Land Supply



Appendix H: Employment Area Developed and Vacant Land Supply

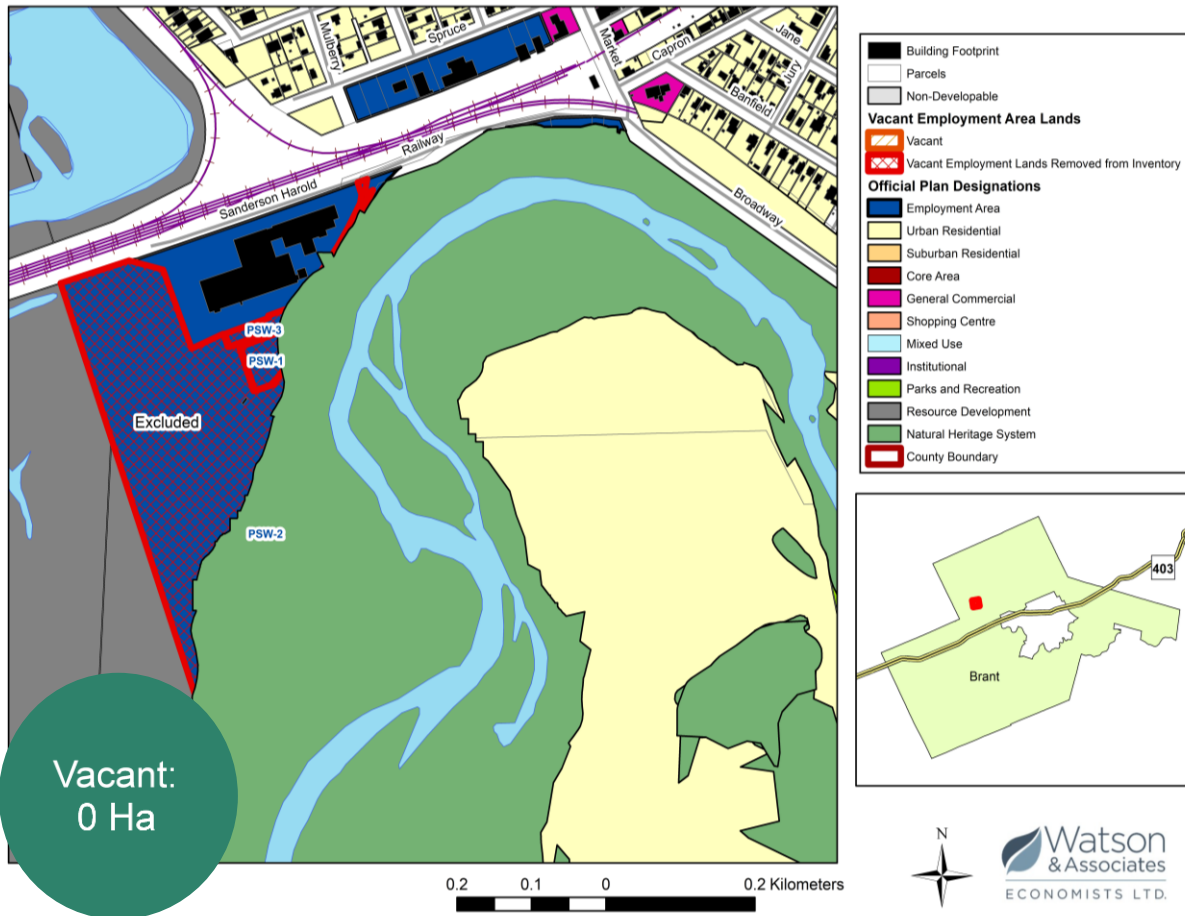
Figure H-1
Paris North Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



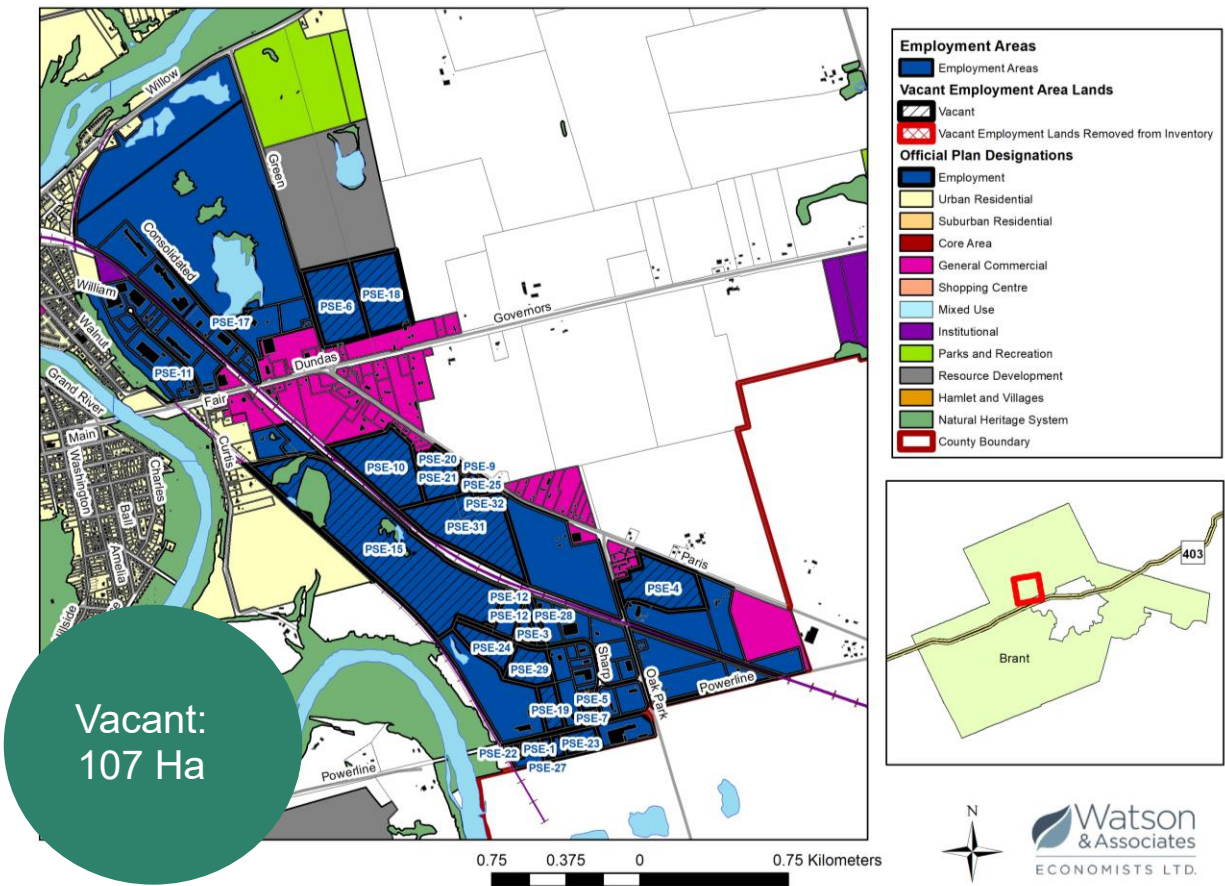
Figure H-2
Paris Southwest Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



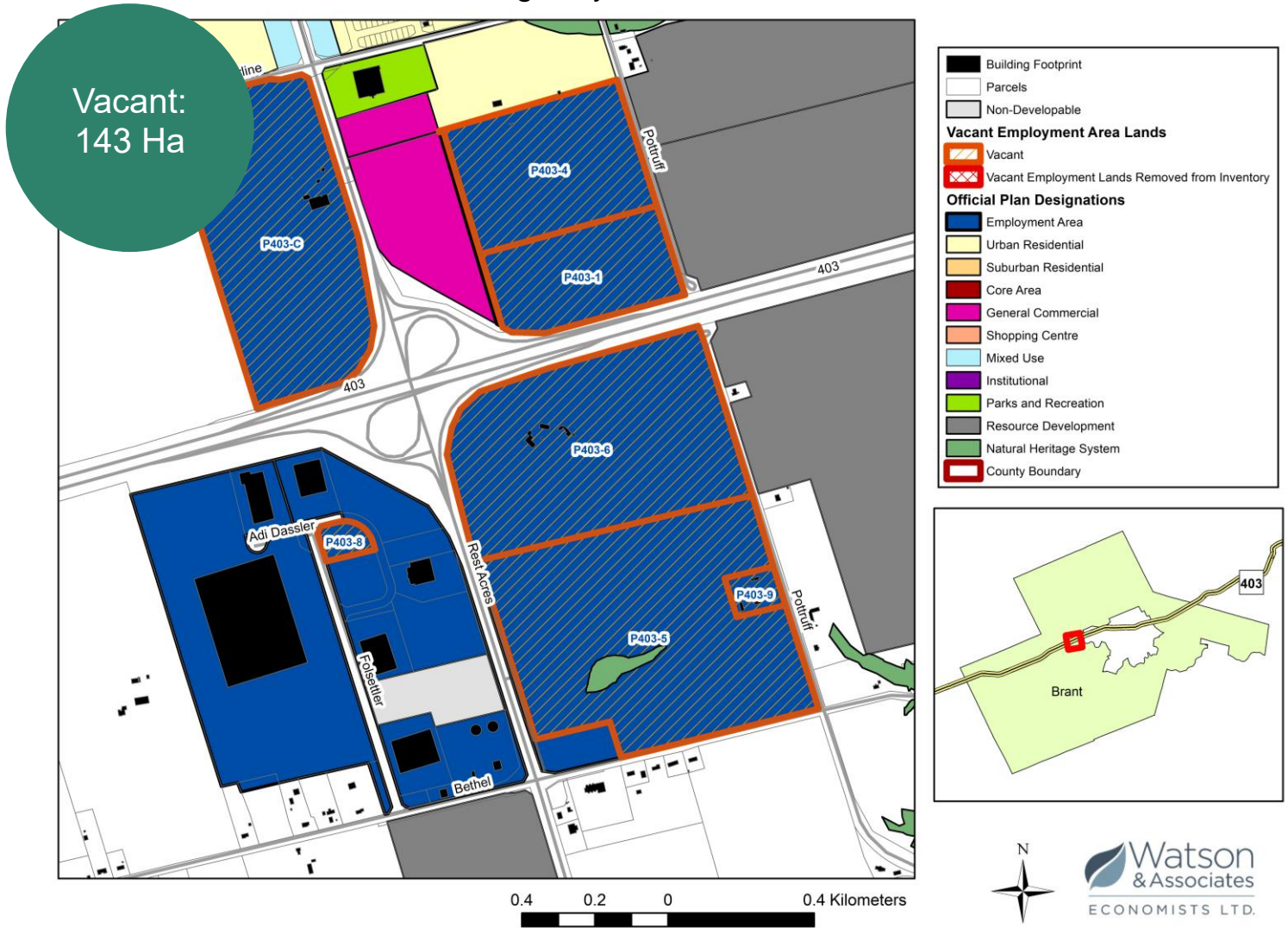
Figure H-3
Paris Southeast Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



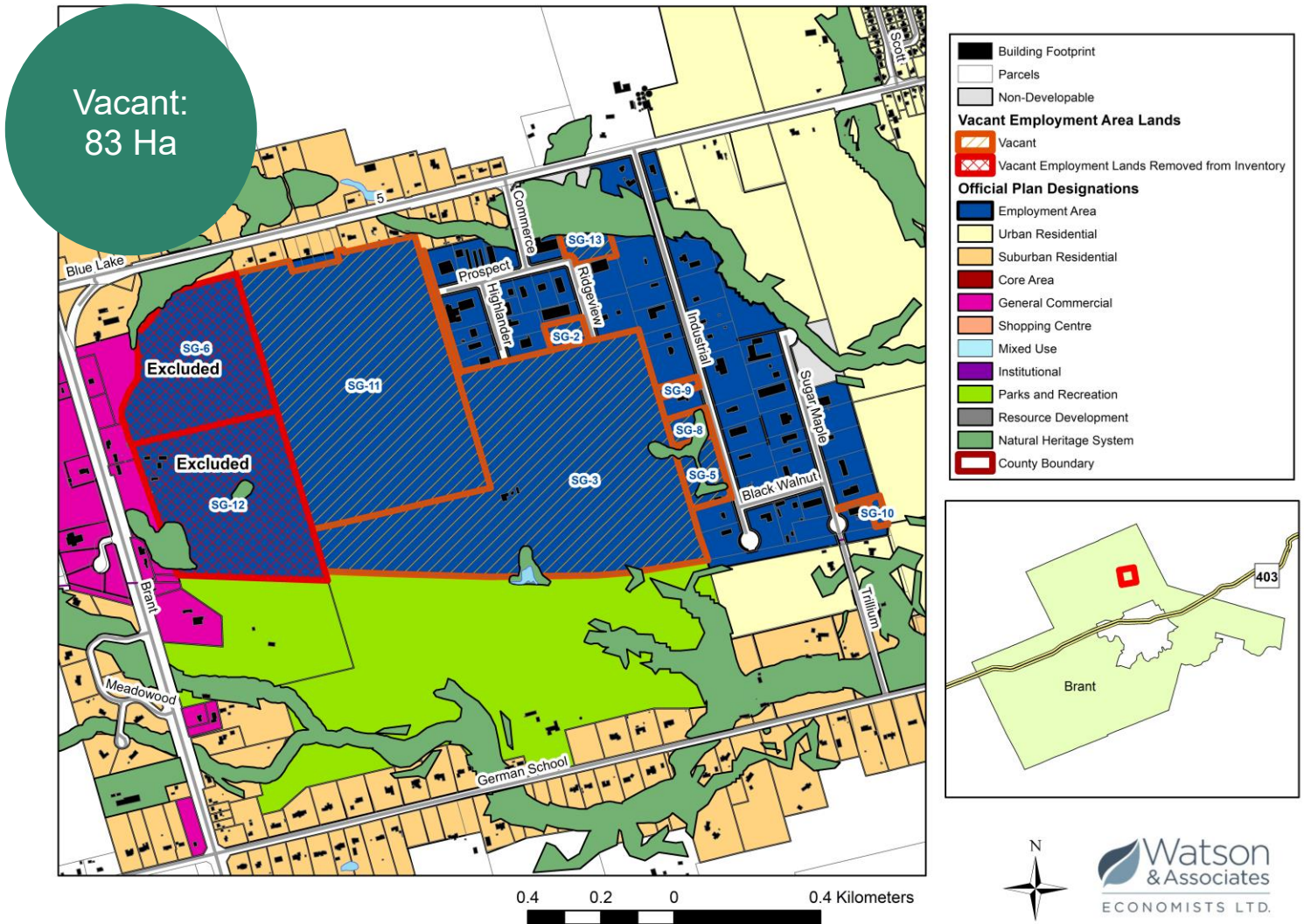
Figure H-4
Paris Highway 403 Business Park



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Figure H-5
St. George Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).

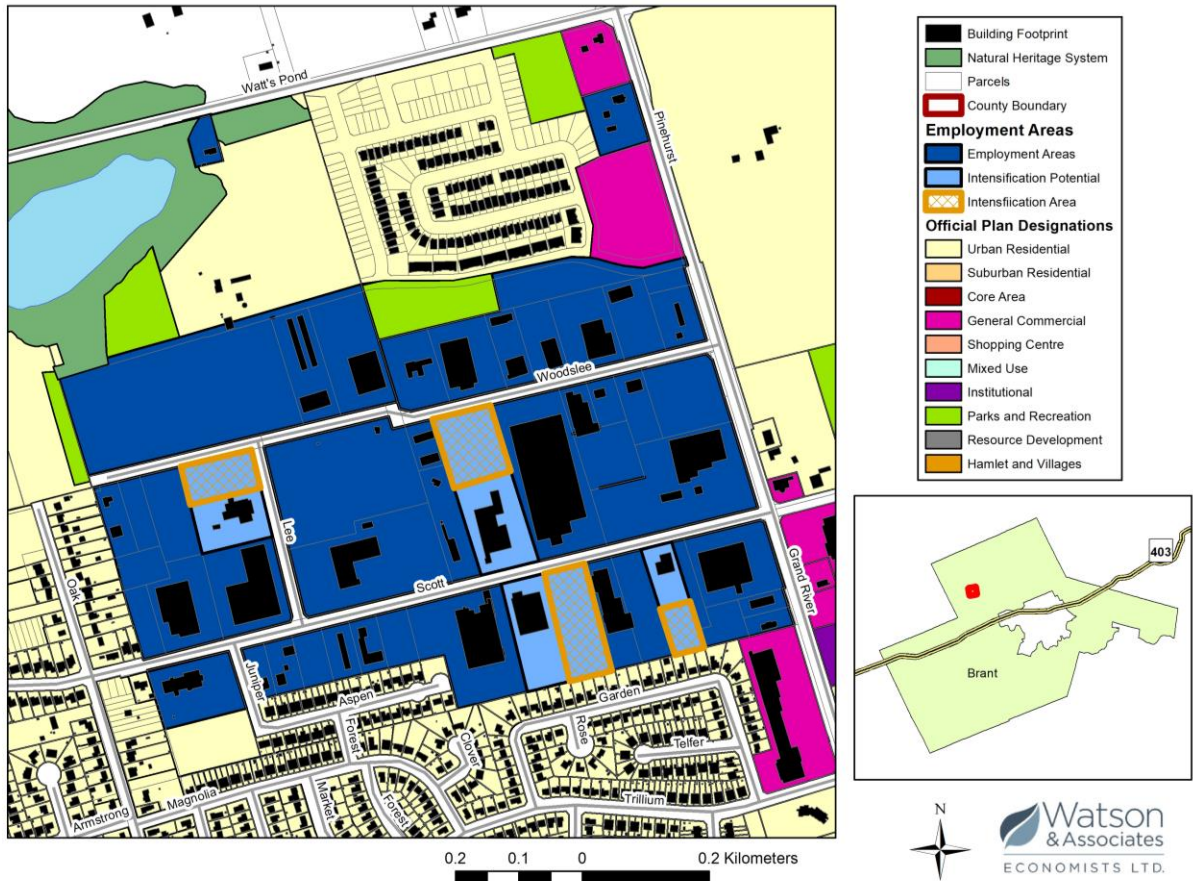


Appendix I

Employment Area Intensification Opportunities in Paris



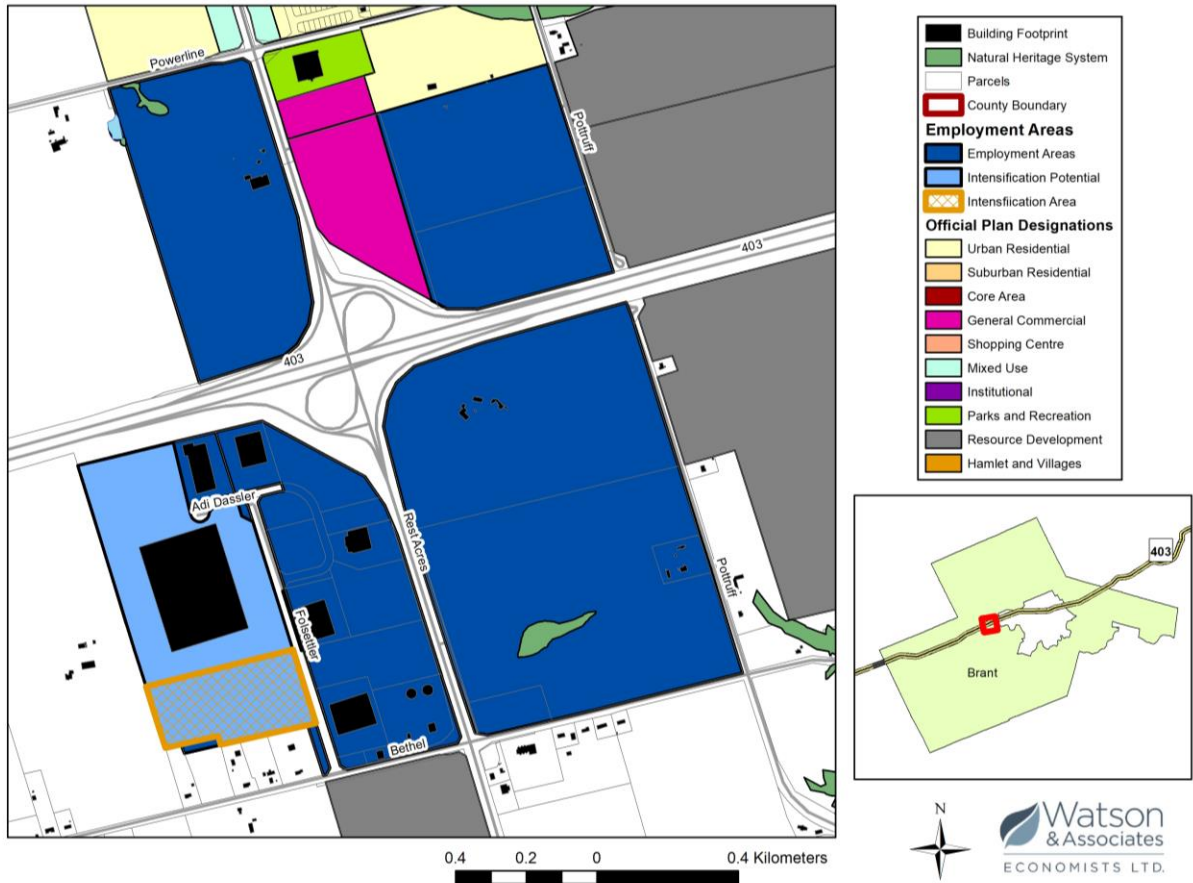
Appendix I-1: Employment Area Intensification Opportunities – North Paris Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



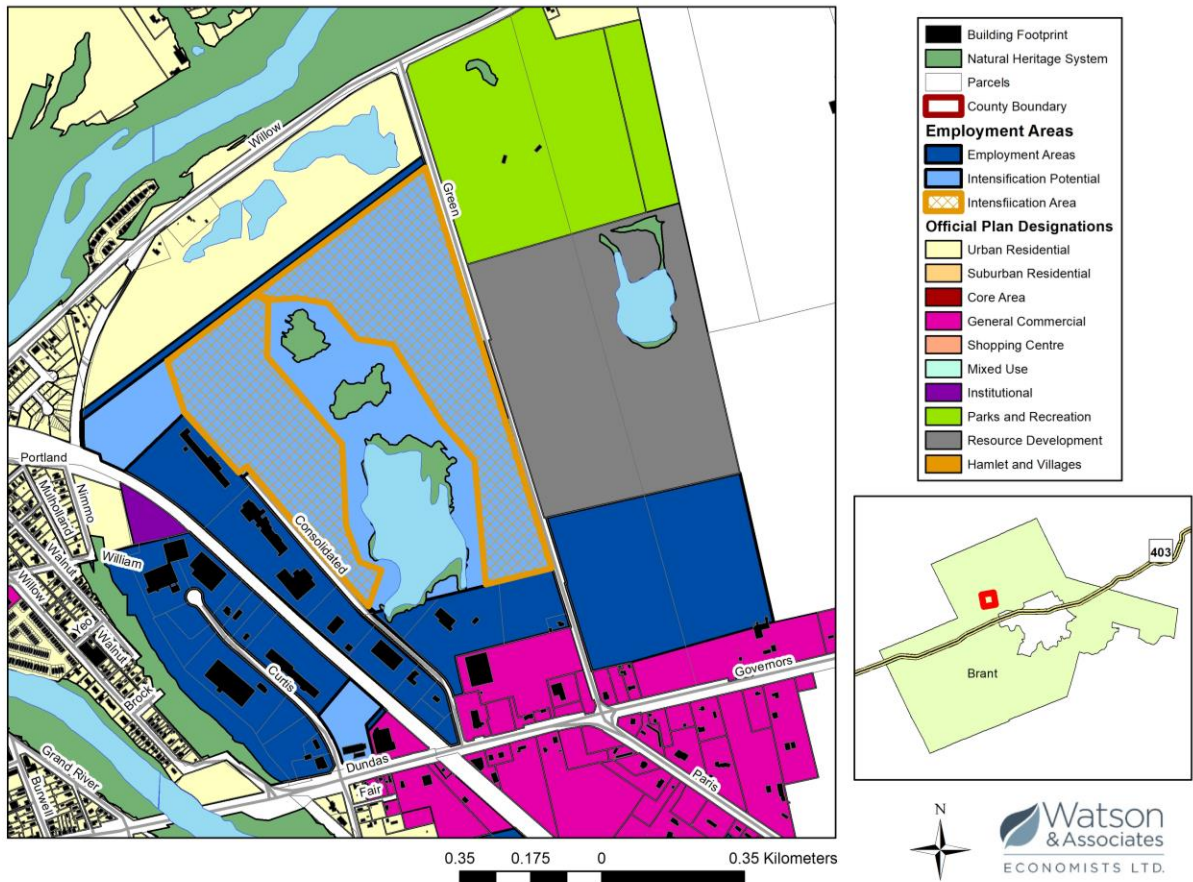
Appendix I-2: Employment Area Intensification Opportunities – Paris 403 Business Park



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



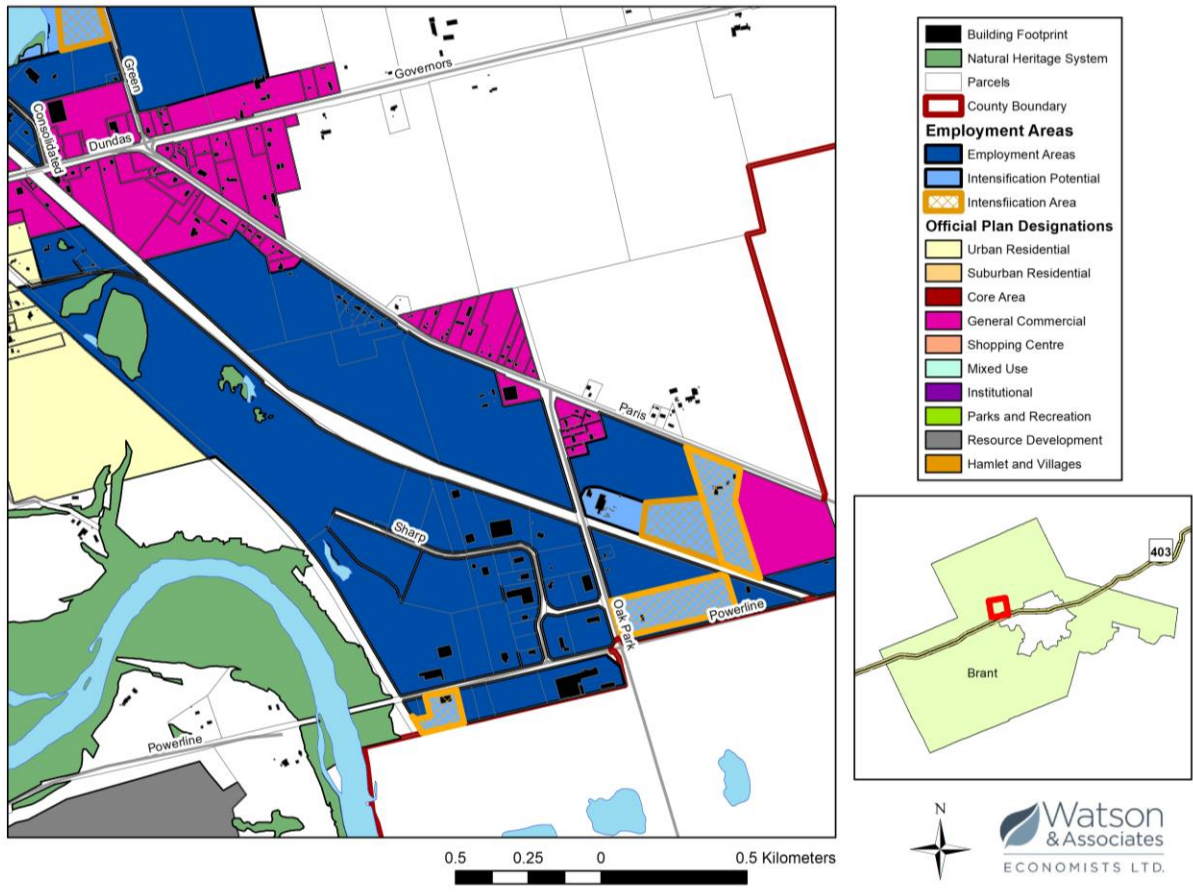
Appendix I-3: Employment Area Intensification Opportunities – Southeast Employment Area, North Portion



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix I-4: Employment Area Intensification Opportunities – Southeast Employment Area, South Portion



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



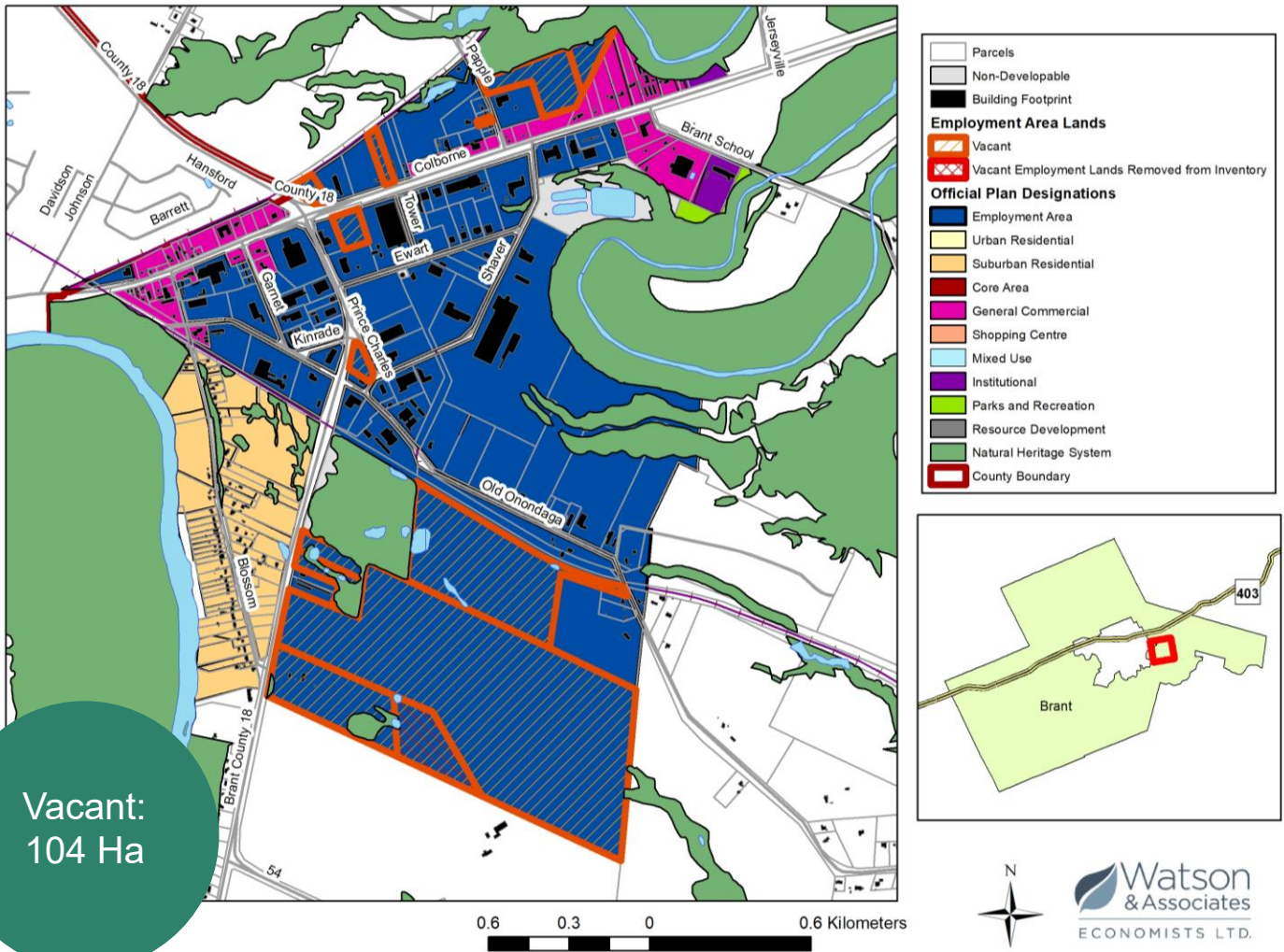
Appendix J

Rural Employment Area Developed and Vacant Land Supply



Appendix J: Rural Employment Area Developed and Vacant Land Supply

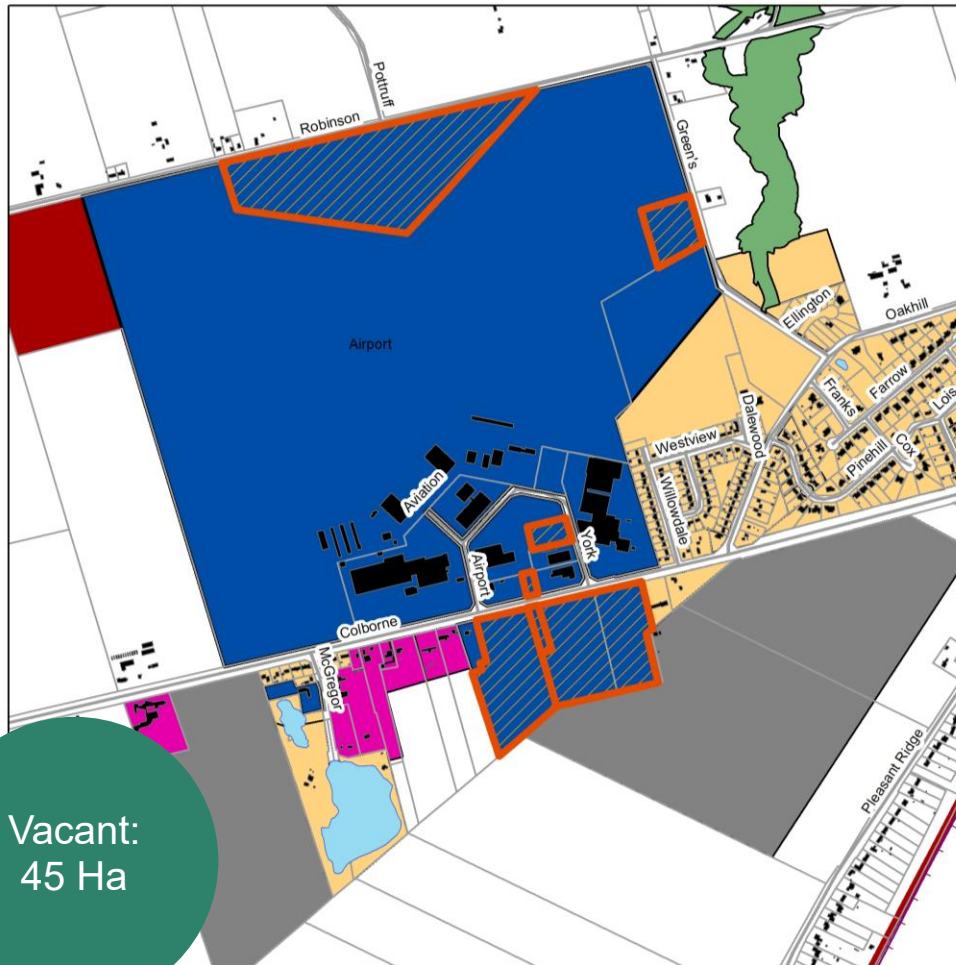
Figure J-1
Cainsville Employment Area



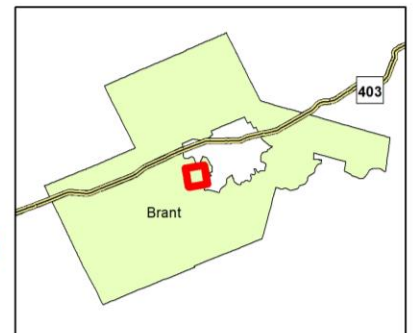
Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Figure J-2
Airport Employment Area



	Parcels
	Non-Developable
	Building Footprint
Employment Area Lands	
	Vacant
	Vacant Employment Lands Removed from Inventory
Official Plan Designations	
	Employment Area
	Urban Residential
	Suburban Residential
	Core Area
	General Commercial
	Shopping Centre
	Mixed Use
	Institutional
	Parks and Recreation
	Resource Development
	Natural Heritage System
	County Boundary



Vacant:
45 Ha

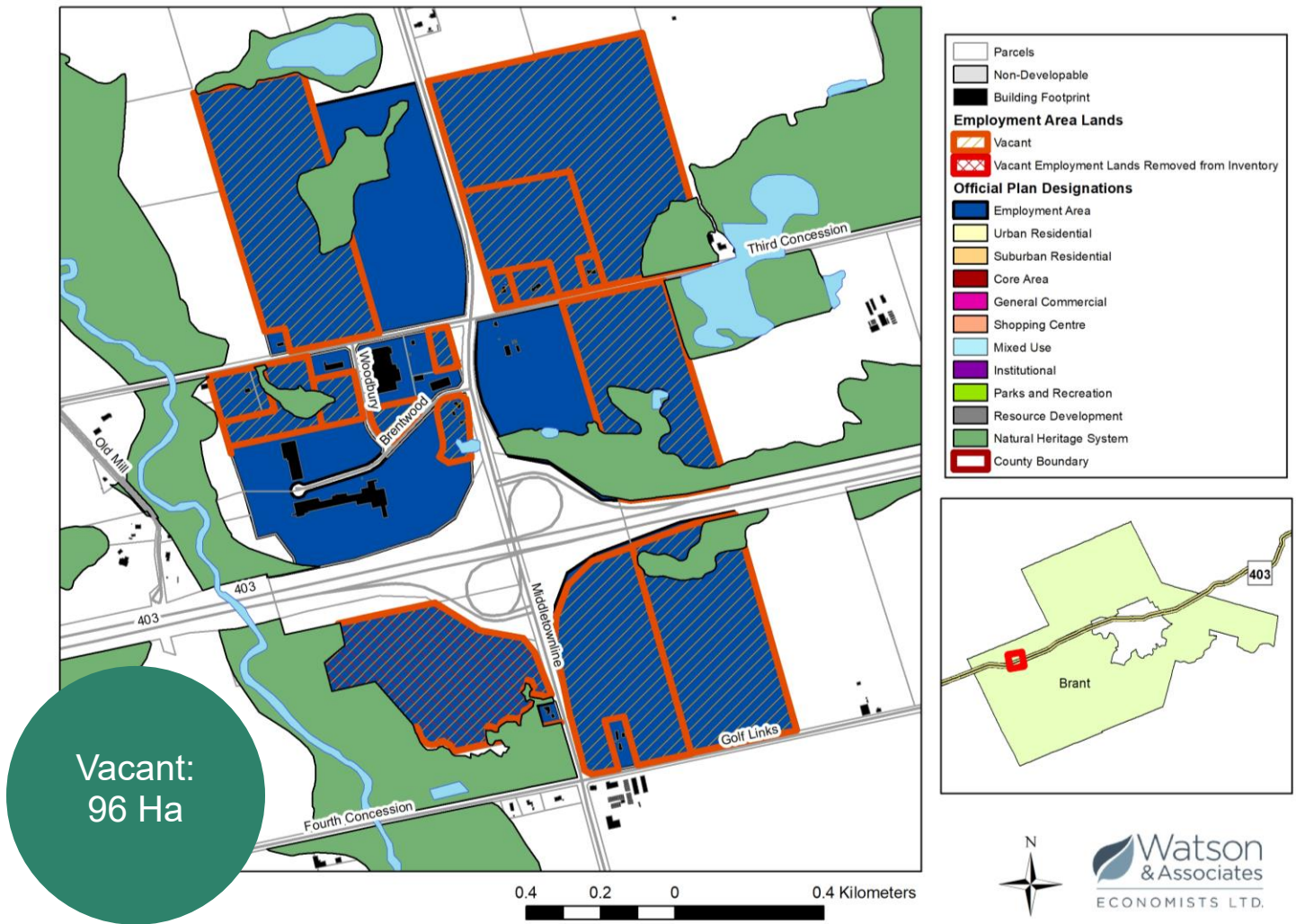


Watson & Associates
ECONOMISTS LTD.

Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



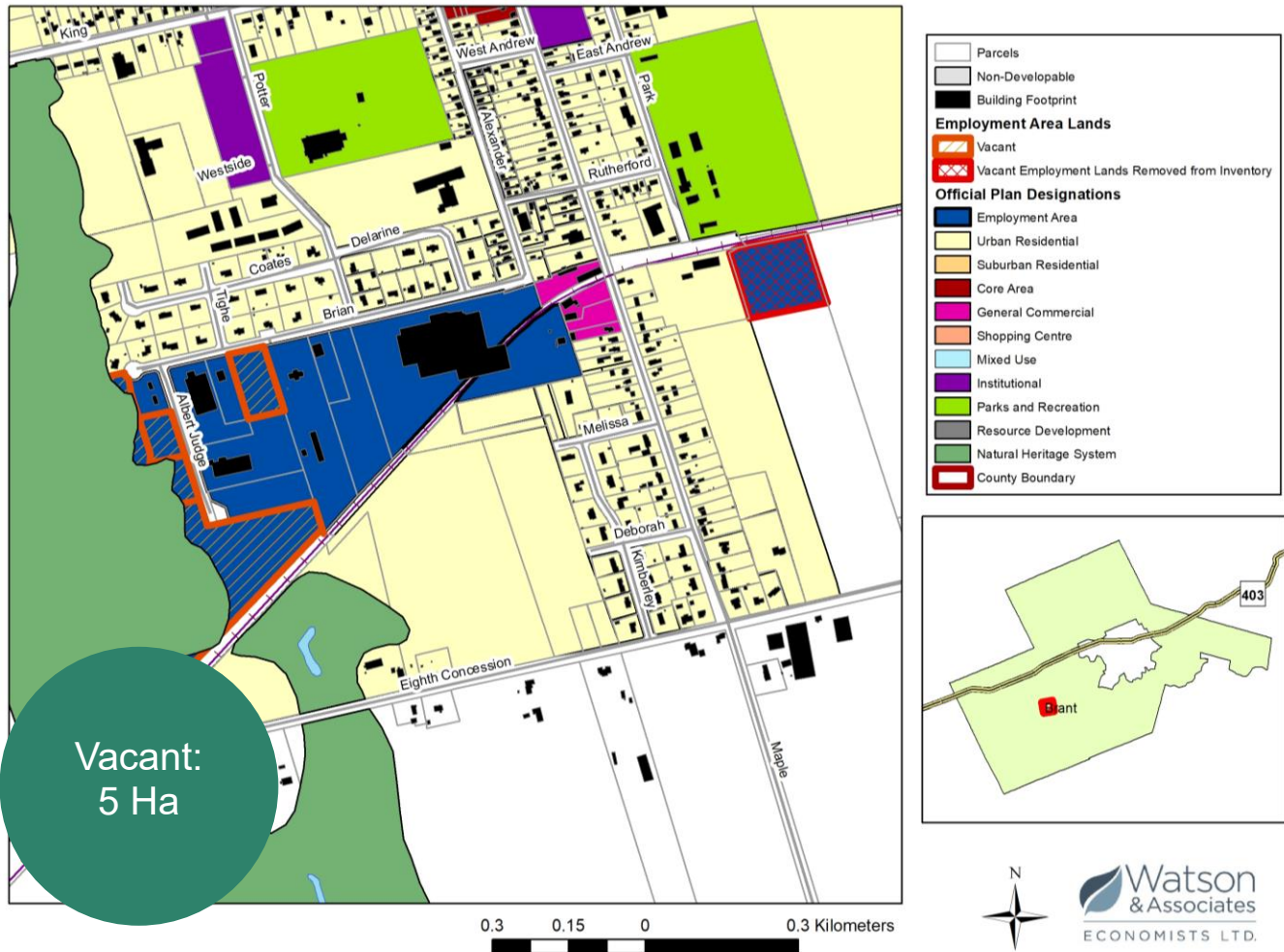
Figure J-3
Highway 25 and Highway 403 Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



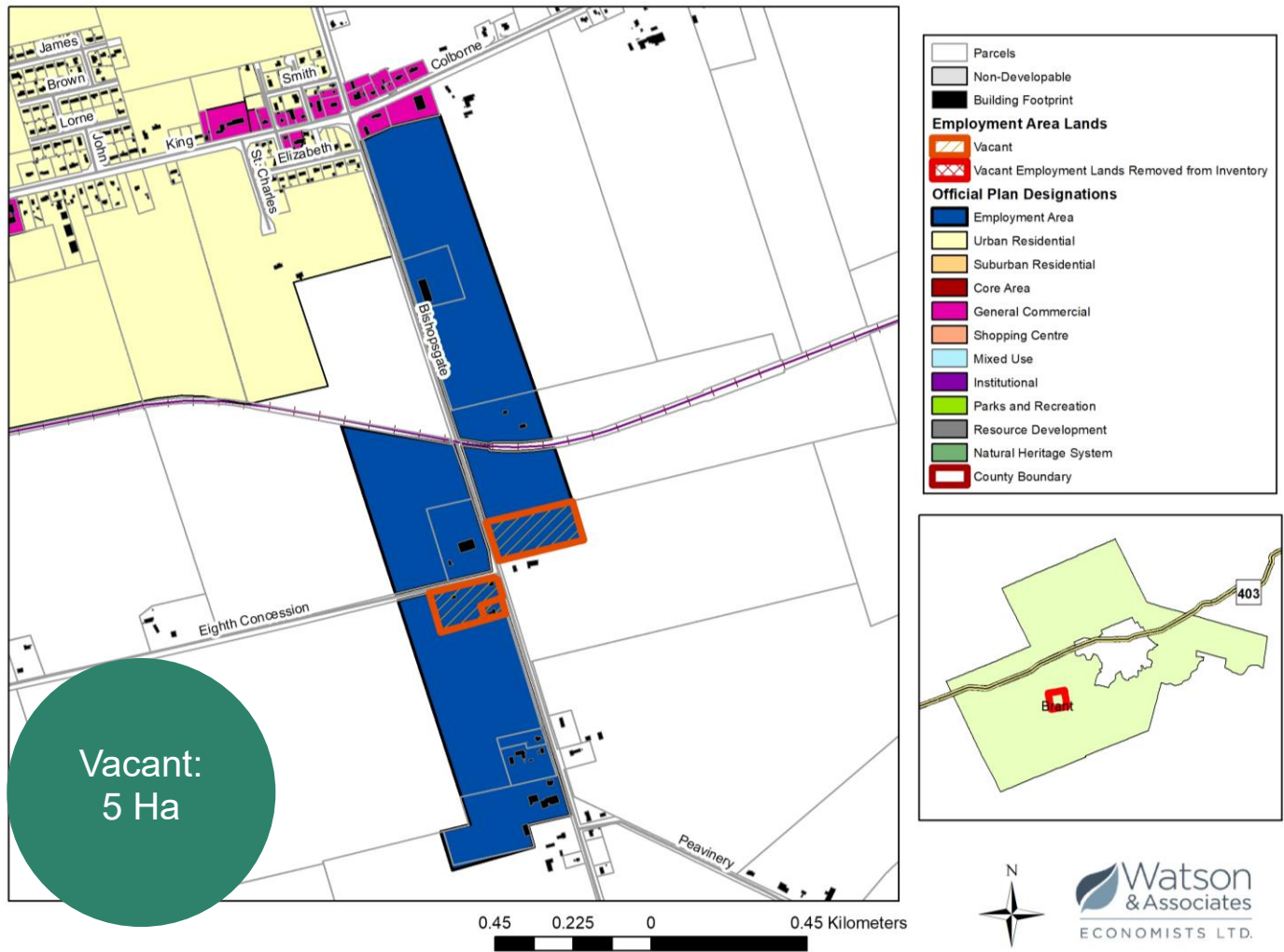
Figure J-4
Burford Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



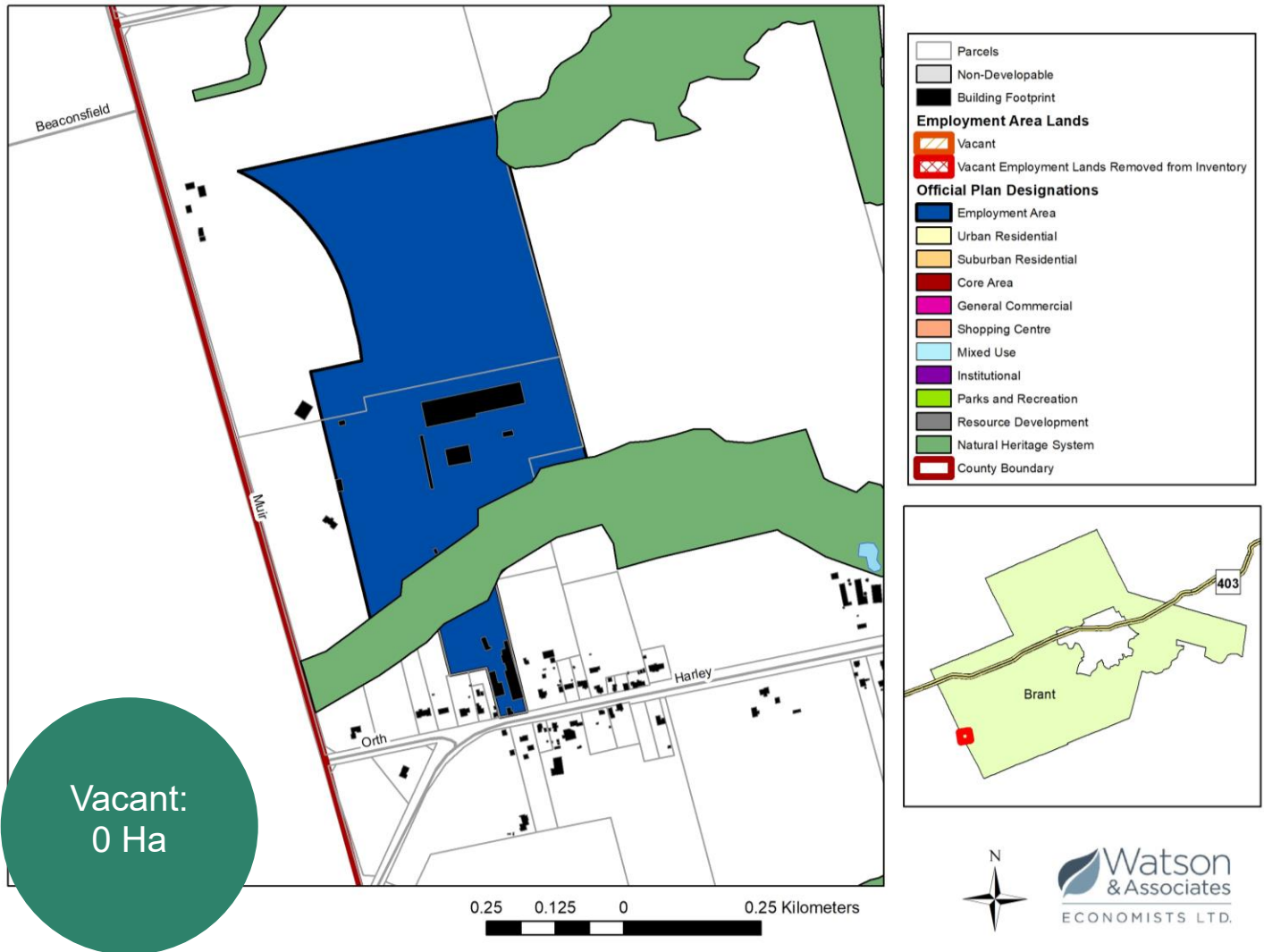
Figure J-5
Bishopsgate Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Figure J-6
New Durham Employment Area



Note: O.P. Designations displayed are based on current County of Brant O.P. (2012).



Appendix K Employment Area Conversion Evaluations



Appendix K: 67 Woodslee Ave., Paris North Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
5	The site is located outside or on the fringe of an assembly of Employment Areas.	✗
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	✗
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	✓
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	✗
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	✗
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	✗
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

#	
✓	4
✗	4
Suggest <u>not</u> to convert.	



Appendix K-2: 326 Grand River St. N, Paris North Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	✓
5	The site is located outside or on the fringe of an assembly of Employment Areas.	✗
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	✗
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	✗
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	✗
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	✗
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	✗
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

#	
✓	3
✗	5
Suggest <u>not</u> to convert.	



Appendix K-3: Sharp Road, Paris Southeast Employment Area

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
5	The site is located outside or on the fringe of an assembly of Employment Areas.	x
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	x
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	x
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	x
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	x
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	x
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	✓
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	Yes

#	
✓	1
x	8
Suggest <u>not</u> to convert.	



Appendix K-4: Site 4a and 4b: Cainsville

Localized Criteria		
3	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
4	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).	x
5	The site is located outside or on the fringe of an assembly of Employment Areas.	x
6	The site offers limited market supply potential for Employment Areas development due to size, configuration, access, physical conditions, servicing constraints, etc.	x
7	The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflicts.	x
8	Recently designated Employment Areas are generally not considered for conversion requests because they're still establishing their marketability, viability, and/or presence.	--
9	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment land sites.	x
10	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer is viable for Employment Area purposes but is viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.	x
11	The conversion of the site to a non-employment use would not conflict with municipal interests and policies.	x
12	The conversion of the site would not present negative cross-jurisdiction impacts that could not be overcome.	x
13	Is this site in a Site Special Policy Area 16 (Priority Employment Areas) as identify in the County of Brant Official Plan, Schedule A?	No

	#
✓	0
x	10
Suggest <u>not</u> to convert.	



Appendix L

S.A.B.E. Evaluation Matrix



Appendix L: Site 1

Site 1: 403 Highway and Pottruff Road Rd., NE

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible			P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?			10% to 25%		APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site	APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?		Separated by Arterial			Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain "urban growth" and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?			Moderate Opportunity		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 2

Site 2: 211 Pottruff Road Rd., NE

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?			Feasible		P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)			Modest Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?			10% to 25%		APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site	APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?		Separated by Arterial			Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)		Minimal Impact			Local Criteria
	Does it offer a good transition from new to existing development?			Moderate Opportunity		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 3

Site 3: 169 Pottruff Road & 21 Bethel Road

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?			Adjacent to Site		APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship	
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1	
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture				APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact				Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback				APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact				P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?				Low Opportunity	Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 4

Site 4: 822 Rest Acres Road

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?				Low Feasibility	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?			Modest Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS				APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?				On Site	APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?		Adjacent to site buffered			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Minimal Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Minimal Impact			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)				High	Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?			Moderate Opportunity		Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)				High Impact	Local Criteria
	Does it offer a good transition from new to existing development?				Low Opportunity	APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 5

Site 5 – Bethel Road Lands (5 sites)

Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact			APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?			Adjacent to Site		APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?			Adjacent to site not buffered		P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?				Low Opportunity	Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 6

Site 6 – 143 Bethel Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?		Highly Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?			Modest Impact	APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible		P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?		Actively used for agriculture, Class 4 to 7		P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)		Low level of agriculture activity (mixed: crops/ & or livestock)		APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 7

Site 7 – Bethel Rd./Clever Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?			Feasible	APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?		Highly Feasible		P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?		Less than 10%		APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?		Actively used for agriculture, Class 4 to 7		P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)		Low level of agriculture activity (mixed: crops/ & or livestock)		APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)		Minimal Impact		Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8



Appendix L: Site 8

Site 8: 1034 Powerline Rd.

Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?		Highly Feasible		APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact		APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available			P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact		APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)		Minimal Impact		APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS			APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No			APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No			P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?		Minimal Impact		APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?			Modest Impact		APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)			Modest Impact		Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8

Appendix L: Site 9

Site 9: 989 Powerline



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Municipal Servicing (water/waste water and transportation)	How easily can a water/wastewater servicing and connection be made available to the lands?	Available				APTG 2020 - 2.2.8.3 a) b) c), 3.2.6.1, 3.2.6.2 P.P.S., 2020 - 1.1.1 g), 1.6.1.a
	When extending services, what is the level of impact on natural environment, including key hydrologic features and areas?		Minimal Impact			APTG - 2.2.8.3 d) e) P.P.S., 2020 - 1.1.1 c) h)
	How feasibility is it for a local road network to be incorporated in the site area, including consideration of environmental features or topography?	Available				P.P.S., 2020 - 1.6.7
Environmental Protection and Protection of Resources	What is the impact on the Watershed if developed as urban?		Minimal Impact			APTG - 3.2.7.1, 3.2.7.2
	How fragmented is the site area when planning to protect Natural Heritage System? (recognizing the importance to preserve linkages between natural features)	Negligible Impact				APTG - 1.2.1 P.P.S., 2020 - 1.1.1 a), c), d)
	How much of the site area includes Natural Heritage Systems lands?	No NHS				APTG - 2.2.8.3 d) e), 4.2.1.3 c)
	Does the site area contain known mineral resources (aggregates) or is there mineral resources or active aggregate operations in proximity to site (adjacent to site, within 1 km)?	No				APTG - 4.2.8 b); P.P.S., 2020 - 2.4.2.2
	Any cultural or heritage features, landscapes, buildings on site or adjacent to site?	No				P.P.S., 2020 - 2.6.1 <i>Note: May require consultation with First Nations.</i>



Topic Area	Criteria	Evaluation			Provincial Policy Relationship
Agriculture & Agri-Food Network	As defined by the PPS, what is the agriculture soil class of the lands?	Not actively used for agriculture, Class 4 to 7			P.P.S., 2020 - 2.3.1
	What is the impact on the broader Agri-Food Network if developed as urban employment? (i.e., is the site currently used for growing crops?)	Rural, not used as agriculture			APTG 2.2.8.3 h) <i>Note: sites with specialty crops in accordance with the APTG are not considered candidates for urban expansion.</i>
	Would the urbanization of the site area introduce/increase traffic flow to surrounding area with agriculture operations? (i.e., would the traffic generated from the Employment Area utilize roads shared by agricultural operations?)	Negligible Impact			Local Criteria
	Any impact on Minimum Distance Separation (MDS) requirements?	Outside any Setback			APTG 2.2.8.3 g)
Cross-Jurisdictional Impact	Are there any potential cross-jurisdictional issues? (e.g., land-use conflicts adjacent, cross-watershed impacts, transportation network)	Negligible Impact			P.P.S., 2020 Part I p.1; P.P.S., 2020 2.2.1 b)



Topic Area	Criteria	Evaluation				Provincial Policy Relationship
Market Analysis	Are there constraints on the site area that would negatively impact the feasibility of the development of the site? (e.g., contaminated lands, topography, specific requirements for site plan approval)	No				Local Criteria
	Is the expansion area in an area with the highest demand for Employment Area growth?	Yes				Local Criteria
	Does the site area offer the opportunity to expand an Existing Employment Area (critical mass)?	Adjacent				Local Criteria
	Does the site offer a configuration to support the most optimal building area, including good road frontage and opportunity to subdivide?	Highest Opportunity				Local Criteria
	How well can the site area (or parcel) access major transportation corridor such as a Provincial Highway?		Within 1 km via Arterial			APTG 2020 - 2.2.8.3 a) b) P.P.S., 2020 1.1.1 e)
Growth Management/ Land-Use Planning	What are the impacts of developing site area as Employment Area on nearby or adjacent uses?	Negligible Impact				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8
	How well does the site area contain “urban growth” and provide for a contiguous urban structure? (e.g., is there a natural buffer that separates the site area with surrounding rural uses, creating a discernible urban edge?)	Negligible Impact				Local Criteria
	Does it offer a good transition from new to existing development?	Highest Opportunity				APTG - 2.2.8.3, 4.2.1.3 c) P.P.S., 2020 - 1.1.3.8