



Phase 1 MCR Report: Urban Structure and Growth Allocations

County of Wellington

Final Report (as amended January 31, 2022)

June 16, 2021

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Phase 1 MCR Report: Urban Structure and Growth Allocations

County of Wellington

Addendum Report

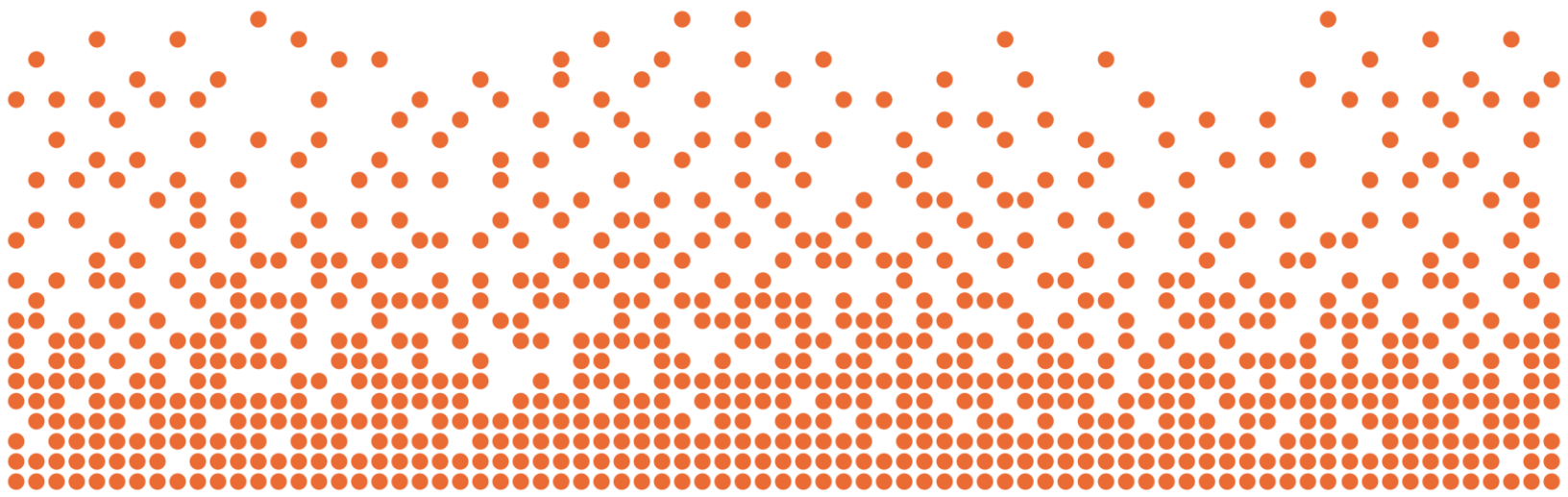
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Chapter 1

Introduction



1. Introduction

1.1 Overview of Changes to County of Wellington Municipal Comprehensive Review (M.C.R.) Phase 1 Urban Structure and Growth Allocations

In June 2021, the County released a draft report of the Wellington M.C.R. Phase 1: Urban Structure and Growth Allocations (dated June 16, 2021) for public comment. The key findings of the M.C.R. Phase 1 Report were also presented as part of a virtual Public Information Centre (P.I.C.) held on June 23, 2021. Based on our review of the comments received, in collaboration with County of Wellington staff, report modifications to the M.C.R. Phase 1 technical analysis were made by Watson & Associates Economists Ltd. (Watson). In addition, the population and employment growth allocations were reviewed based on the initial draft findings of the Wellington County M.C.R. Municipal Servicing Analysis Study (water/wastewater servicing) currently underway by WSP.¹ The purpose of this Addendum Report is to summarize the updated technical analysis undertaken following the release of the draft report in June 2021. This addendum report includes an update of key figures and appendices provided in the previous Phase 1 draft report.

It is important to note that no changes were made to the County-wide population, housing and employment forecast to 2051. The County is forecast to reach a population of 160,000 and an employment base of 70,000 by 2051. The County-wide population and employment forecast is discussed in Chapter 3 of the Wellington M.C.R. Phase 1 Report. As discussed in that report, the long-term population and employment growth forecast for the County of Wellington, as set out in Schedule 3 of the Growth Plan, 2019, has been comprehensively evaluated. The review considered 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 Wellington.

¹ Technical Draft Memo: County of Wellington Municipal Comprehensive Review Municipal Servicing Analysis, prepared by WSP, October 14, 2021.



Based on a further review of potential growth options in the rural area of the County,² a reduction has been made to the population and housing growth within the Rural Area, with a greater allocation to the Urban Area. This adjustment impacts the rural and urban growth allocations for the Township of Mapleton and the Town of Minto. Overall, the urban population growth forecast at the County-wide level increased by 1,100 persons based on adjustments that were made to the rural and urban allocations to Mapleton and Minto.

Based on discussions with Township of Mapleton staff, a minor modification of approximately 200 employees was made to the growth allocation by Urban and Rural Area. The modification included a reduction in the employment growth allocated to the Rural Employment Areas and a corresponding increase in the growth allocation to the Urban Employment Areas. At a County-wide level, the modification is considered minimal with no change in the percentage of employment growth by Urban and Rural Area.

In the past, the Area Municipalities in the northern portion³ of the County have represented a smaller share of the County's population growth. The coronavirus disease (COVID-19) pandemic has accelerated labour force and housing demand relative to trends observed over the past decade, driven by the rise of telework and the associated outward growth pressures to the Outer Ring of the Greater Golden Horseshoe (G.G.H.) region. Based on comments relating to this trend, Watson reviewed the population and housing growth allocation to the Area Municipalities in the northern portion of the County. This review considered the growth allocations to the Urban Centres, including the annual population and housing growth to 2051. Water and wastewater servicing potential, as well as known servicing constraints to the County's Urban Centres were also reviewed based on the draft findings of the Wellington County M.C.R. Municipal Servicing Analysis Study. The Municipal Servicing Analysis Study identifies the approximate wastewater servicing capacity remaining by Urban Centre and notes limitations with respect to wastewater servicing capacity in Wellington North, specifically within Arthur due to assimilative capacity.

Based on a further review of demand and servicing factors, Watson has increased the 2051 population allocation to the Township of Mapleton by 5% (approximately 700) to

² Based on discussions and analysis prepared by the County of Wellington.

³ Includes Mapleton, Minto, and Wellington North.

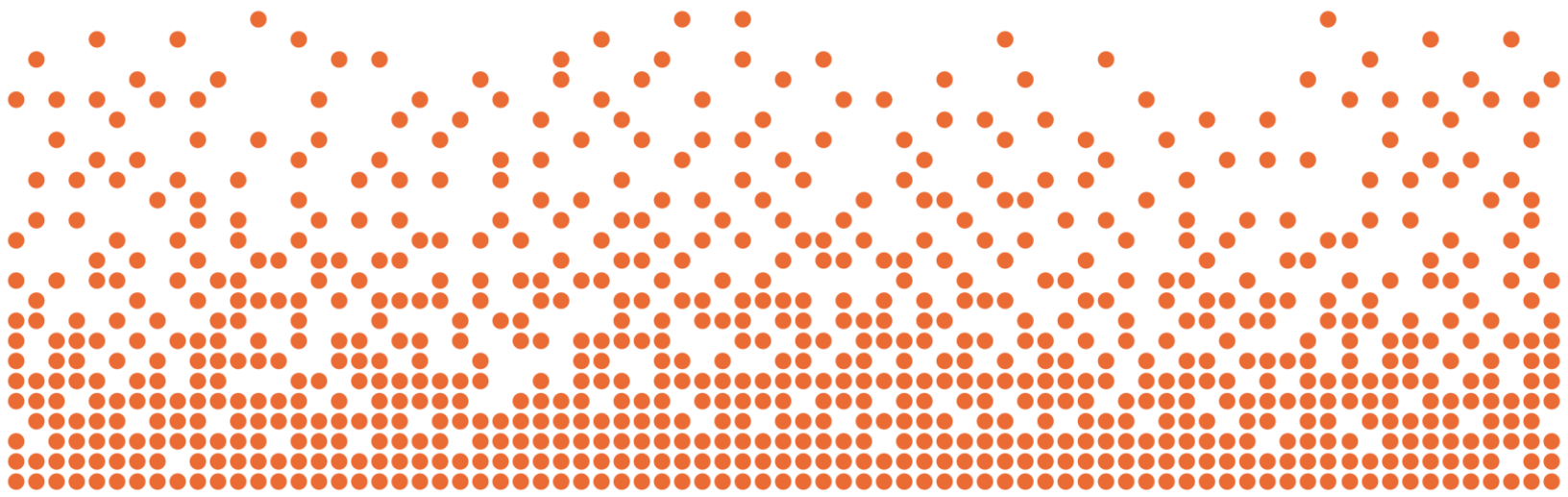


accommodate further growth within the Drayton and Moorefield Urban Centres. As a result of this change, the Township of Mapleton's annual population growth rate over the forecast horizon has been increased from 0.8% to 1.0% and provides a growth rate more closer to other Area Municipalities in the northern area of the County (as a comparison, annual growth population rates to 2051 of Minto and Wellington North are at 1.5%).

Watson reduced the population allocation of the Township of Centre Wellington by approximately 1%, modestly impacting the forecast growth to the Fergus Urban Centre (approximately 700).

This Addendum Report includes the following components:

- Updated housing, population and employment growth forecast allocations to the Rural and Urban Areas, as well as by Area Municipality; and
- Updated detailed growth forecasting appendices.



Chapter 2

Growth Allocations



2. Population and Housing Growth Allocations – Urban and Rural Systems

This section of the Addendum updates pages 4-3 to 4-26 in Chapter 4 of the Wellington M.C.R. Phase 1: Urban Structure and Growth Allocations. Key changes are summarized below:

- Population and Housing Growth Allocations by Area Municipality, 2016 to 2051:
 - Township of Centre Wellington; and
 - Township of Mapleton.
- Population and Housing Growth Allocations by Urban Centre and Remaining Rural Area, 2016 to 2051
 - Township of Centre Wellington (Fergus and Elora Urban Centres);
 - Township of Mapleton (Rural Area, Drayton Urban Centre and Moorefield Urban Centre); and
 - Town of Minto (Rural Area and Palmerston Urban Centre).

Updated forecasts by Area Municipality and Urban Centre are provided in Appendix A in this Addendum which replaces Appendix E in the M.C.R. Phase 1 Report.

2.1 Population and Housing Growth Allocations by Area Municipality, 2016 to 2051

Figures 1 through to 6 provide a summary of the population and housing forecast to 2051 by Area Municipality. Further details are provided in Appendix A. While population and employment growth rates vary significantly by geographic area, each of the Area Municipalities share a number of relatively common attributes with respect to long-term residential development and demographic trends, including:

- All Area Municipalities are expected to experience housing growth over the long-term forecast period;
- Average annual new housing construction is anticipated to increase from levels experienced over the past five years for all Urban Centres that are not constrained by the availability of urban land or water/wastewater servicing requirements;



- 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
- Average persons per unit (P.P.U.) levels are forecast to experience a slight decline over the forecast horizon. In addition to demographic trends, both the rate and type of Census families and Census non-families will have a significant influence on projected P.P.U. levels.

As identified above, various factors were considered in allocating population and housing growth by Urban Centre and remaining Rural Area. In addition to the above considerations, a number of assumptions were made with respect to the residential growth potential of each Urban Centre within the County, based on discussions with the County and the County of Wellington M.C.R. technical working group (Technical Resource Team).

Key observations regarding the revised housing and population growth allocations have been organized below by Area Municipality. As previously mentioned, further details with respect to the population and housing by Area Municipality are provided in Appendix A.

Centre Wellington

- As of 2021, 81% of the Centre Wellington population is located within the Municipality's Urban System, while 19% is located within the Rural System. Centre Wellington's population base compared to the other Area Municipalities is more oriented towards the County's Urban System.
- As summarized in Figures 1 and 2, Centre Wellington is anticipated to accommodate nearly half (44%) the County's population growth over the forecast horizon. This is consistent with population and housing trends observed over the past several decades.
- As summarized in Figure 3, Centre Wellington's population is anticipated to grow at an annual rate of 2.0% over the next 35 years (2016 to 2051), which is higher than the annual population growth rate experienced over the most recent 20-year Census period (2006 to 2016) of 1.3% annually.
- As summarized in Figure 4, Centre Wellington is anticipated to add 11,260 housing units over the 2016 to 2051 period, representing approximately 322 units



annually, which is almost double the annual housing units added over the 2006 and 2016 period (174 units per year).

- It is anticipated that Centre Wellington will accommodate a wide range of housing structure types compared to historical trends; however, the largest portion of housing growth is anticipated in low-density housing forms as summarized in the Phase 1 M.C.R. Report (page 4-12). This is consistent with upcoming development in the Township's active development pipeline (registered/unbuilt and proposed).
- The majority of future development in Centre Wellington is anticipated to be accommodated within the Fergus and Elora/Salem Urban Centres, as will be discussed later in this Chapter.

Erin

- As of 2021, 64% of the Town of Erin population is located within the Urban System, while 36% is located within the Rural System. As summarized in Figures 1 and 2, Erin is anticipated to accommodate nearly one-quarter (22%) of the County's population growth over the forecast horizon.
- Population growth within Erin is anticipated to be significantly higher than historical trends, given anticipated investments and expansions in municipal water and wastewater servicing in Erin Village and Hillsburgh. As summarized in Figure 3, Erin is anticipated to achieve a higher rate of population growth (2.3% annually) compared to other Area Municipalities. As a comparison, the annual population growth rate in Erin over the 2006 to 2016 period was approximately 0.8% annually.
- As summarized in Figure 4, Erin is anticipated to add 5,090 housing units over the 2016 to 2051 period or approximately 145 units annually, which is significantly higher than the housing units added over the 2006 to 2016 period of approximately 30 units annually.
- The majority of future urban development in the Town of Erin is anticipated to be accommodated within the Erin Village and Hillsburgh Urban Centres, as will be discussed later in this Chapter.

Guelph-Eramosa

- As of 2021, 38% of the Guelph-Eramosa population is located within the Township's Urban System, while 62% is located within the Rural System. As



summarized in Figures 1 and 2, Guelph-Eramosa is anticipated to accommodate a small share (2%) of the County's population growth over the forecast horizon.

- Post-2021, it is anticipated that growth within Guelph-Eramosa will slow due to limitations regarding municipal servicing within the Urban Centre of Rockwood.
- As a result of these limitations for future growth within the Urban Centre of Rockwood, the annual population growth rate of Guelph-Eramosa is anticipated to increase at a rate of 0.3%, which is lower than the growth rate observed over the most recent 20-year Census period of 1.1% annually.
- Due to growth constraints within the Urban Centre of Rockwood, a large portion of future development in Guelph-Eramosa is anticipated to occur outside Rockwood and in rural settlements.

Puslinch

- The existing (2021) population base of Puslinch is entirely accommodated within the Rural System with 10% of the population base concentrated within the two Secondary Urban Centres (Morrison and Aberfoyle). As discussed in the M.C.R. Phase 1 Report (Chapter 2), these Secondary Urban Centres serve as important community service hubs to the Township and County.
- As summarized in Figures 1 and 2, Puslinch is anticipated to accommodate a small share (4%) of the County's population growth over the forecast horizon since Puslinch lacks Primary Urban Centres which offer full municipal servicing (water/wastewater servicing).
- The annual population growth rate of Puslinch is anticipated to increase at an annual rate of 0.8%, which is lower than the growth rate observed over the most recent 20-year Census period of 1.5% annually.
- As summarized in Figure 4, it is anticipated that Puslinch will add 840 housing units over the 2016 to 2051 period, or 24 units annually over the forecast horizon, which is lower than the annual housing growth observed over the most recent 20-year Census period of 36 units annually.
- Given the limited opportunities within the Secondary Urban Centres of Aberfoyle and Morrison, a portion of the growth within Puslinch will be accommodated through severances in the Rural Area.



Wellington North

- As of 2021, 65% of the Wellington North population is located within the Township's Urban System, while 35% is located within the Rural System. As summarized in Figures 1 and 2, Wellington North is anticipated to accommodate 12% of the County's population growth over the forecast horizon.
- As summarized in Figure 3, the annual population growth rate of Wellington North is anticipated to increase at a rate of 1.5%, which is significantly higher than the growth rate observed over the most recent 20-year Census period of 0.3% annually.
- As summarized in Figure 4, it is anticipated that Wellington North will add 3,000 housing units (86 units annually) to its housing base over the forecast horizon, which is more than double the annual housing growth over the most recent 20-year Census period of 28 units annually.
- It is anticipated that the majority of future development within Wellington North will be accommodated in the Urban Centres of Arthur and Mount Forest, as will be discussed later in this Chapter.

Minto

- Minto's existing population base, as of 2021, comprises 66% of the population within the Urban System and 34% of the population in the Rural System.
- As summarized in Figures 1 and 2, Minto is anticipated to accommodate 9% of the County's population growth over the forecast horizon.
- The annual population growth rate in Minto is anticipated to increase at a rate of 1.5% which is significantly higher than the growth rate observed over the most recent 20-year Census period of 0.5% annually.
- As summarized in Figure 4, it is anticipated that Minto will add 2,210 housing units (63 units annually) over the forecast horizon, which is close to three times the annual amount of housing growth experienced over the most recent 20-year Census period (23 housing units annually).
- As discussed in Chapter 4 of the M.C.R. Phase 1 Report, Minto has experienced an increase in the share of County-wide residential building permit activity (new units only) over the past few years compared to previous periods.
- It is anticipated that the majority of the future urban development within Minto will be accommodated within the Urban Centre of Palmerston and to a lesser extent



the Urban Centres of Harriston and Clifford, as will be discussed later in this Chapter.

Mapleton

- As of 2021, 26% of the Mapleton population is located within the Township's Urban System, while 74% is located within the Rural System. Compared to the other Area Municipalities, Mapleton's existing population base is more oriented towards the Rural System.
- As summarized in Figures 1 and 2, Minto is anticipated to accommodate 7% of the County's population growth over the forecast horizon.
- Mapleton's annual population growth rate is anticipated to increase at annual population growth rate of 1% which is a comparable annual population growth rate observed over the most recent 20-year Census period.
- It is important to recognize that Mapleton has accommodated a large share (approximately 46%) of recent housing activity within the Rural Area over the 2006 to 2019 period.⁴ Going forward, and consistent with provincial policy direction, the County is directing future growth to its Primary Urban Centres.
- As summarized in Figure 4, it is anticipated that Mapleton will add 1,700 housing unit over the forecast horizon, or 48 units annually, which is well above annual housing growth levels experienced over the most recent 20-year Census period (31 units annually).
- As discussed in Chapter 4 of the Phase 1 M.C.R. Report, Mapleton has maintained its share of County-wide residential building permit activity (new units only) over the past decade.
- It is anticipated that future urban development in Mapleton will be accommodated within the Urban Centre of Drayton and to a lesser extent the Urban Centre of Moorefield, as will be discussed later in this Chapter.

⁴ As determined through recent residential building permit activity (new units only).

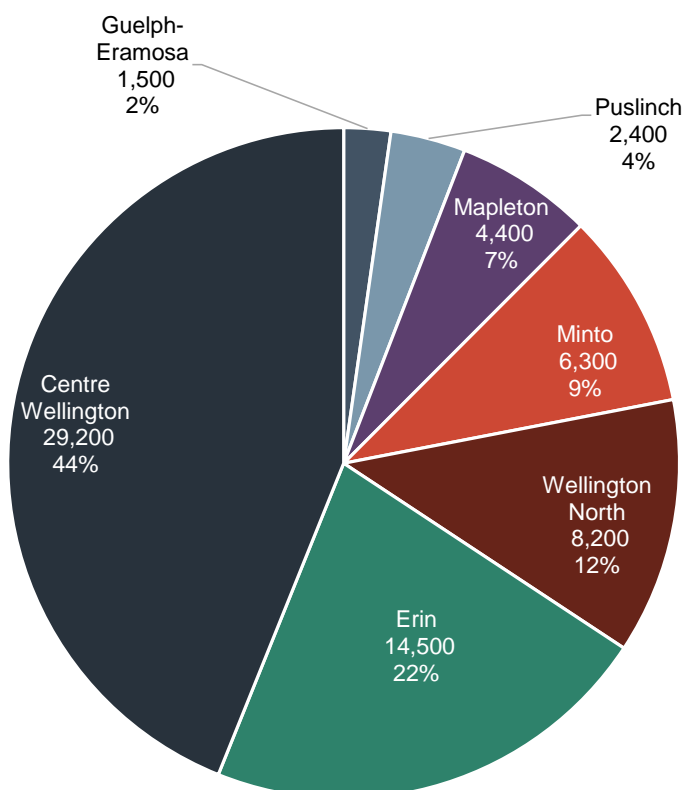


Figure 1
County of Wellington
Population Forecast by Area Municipality

Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	29,000	11,800	13,200	10,800	8,900	12,300	7,600	93,600
2051	58,200	26,300	14,700	15,200	15,200	20,500	10,000	160,000
Population Growth								
2016 - 2051	29,200	14,500	1,500	4,400	6,300	8,200	2,400	66,400

Note: May not add up precisely due to rounding.
Source: Watson & Associates Economists Ltd.

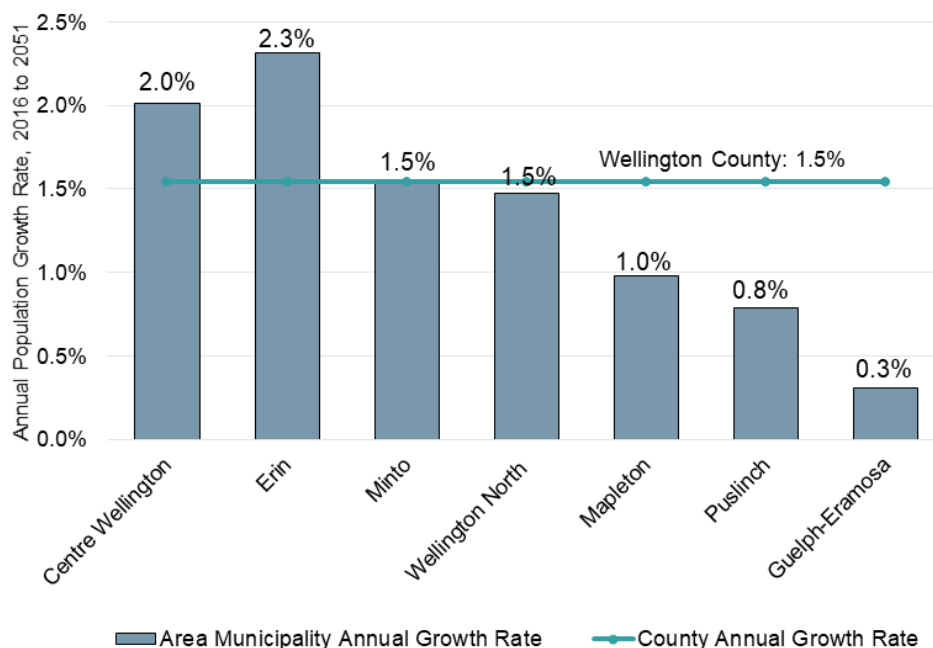
Figure 2
County of Wellington
Population Growth Allocation, 2016 to 2051
by Area Municipality



Source: Watson & Associates Economists Ltd.



Figure 3
County of Wellington
Annual Population Growth Rate, 2016 to 2051
By Area Municipality



Source: Watson & Associates Economists Ltd.

Figure 4
County of Wellington
Housing Forecast by Area Municipality

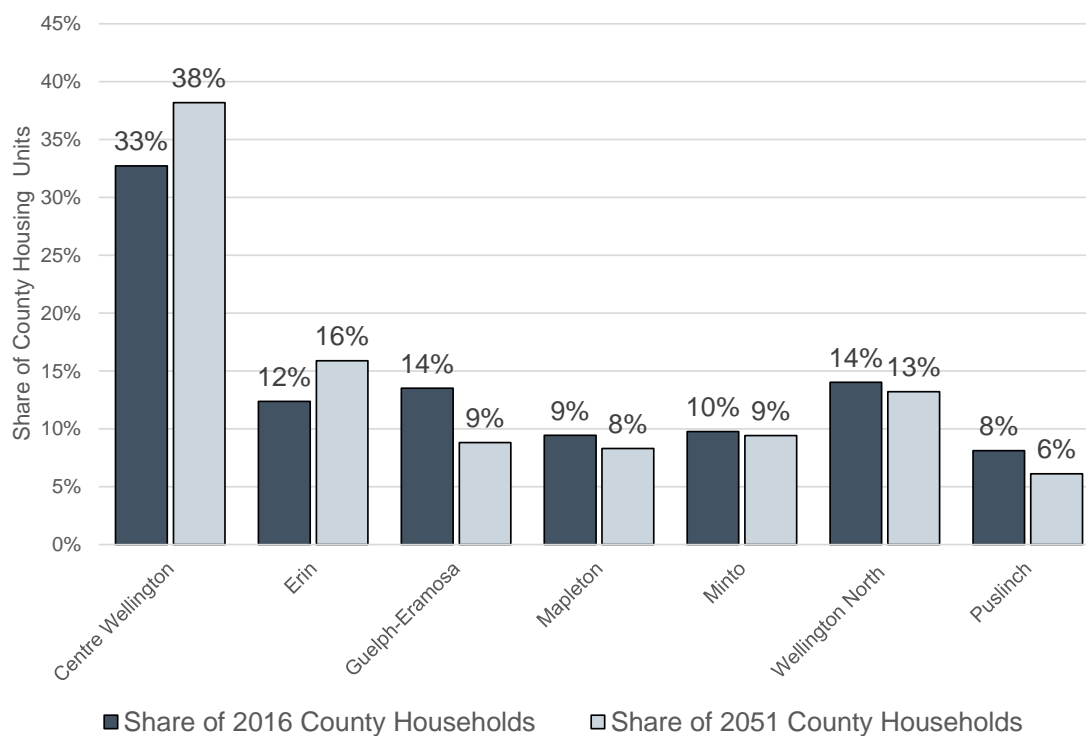
Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	10,870	4,110	4,490	3,140	3,250	4,660	2,700	33,220
2051	22,130	9,200	5,110	4,820	5,460	7,660	3,550	57,930
Housing Growth								
2016 - 2051	11,260	5,090	620	1,680	2,210	3,000	850	24,710

Note: Above figure includes "other" dwellings of approximately 540 units.

Source: Watson & Associates Economists Ltd.



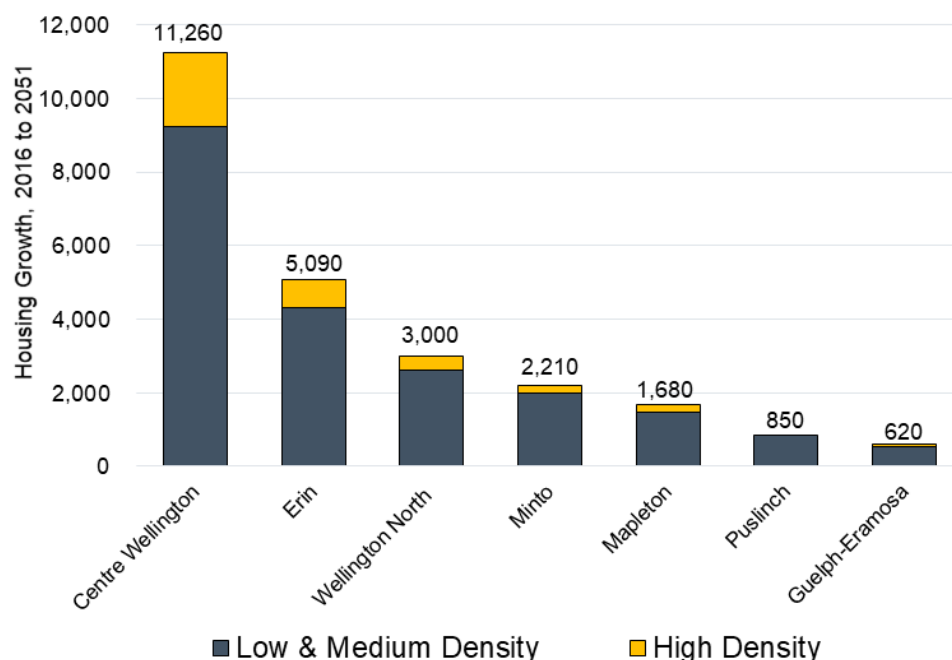
Figure 5
County of Wellington
Share of County Housing Units in 2016 and 2051
By Area Municipality



Source: Watson & Associates Economists Ltd.



Figure 6
Wellington County
Housing Growth by Area Municipality, 2016 to 2051



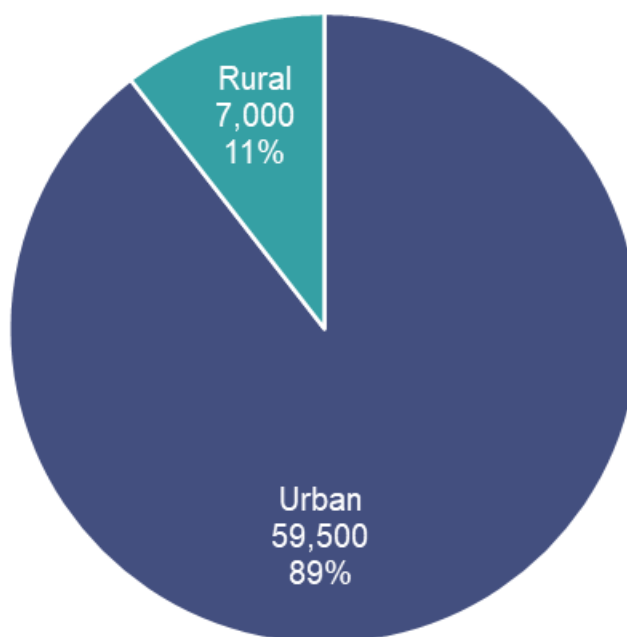
Source: Watson & Associates Economists Ltd.

2.2 Population and Housing Growth Allocations by Urban Centre and Remaining Rural Area, 2016 to 2051

As discussed in the County of Wellington M.C.R. Phase 1 Report, most of the County's population and housing growth is directed to Primary Urban Centres with full municipal servicing. As summarized in Figure 7, 89% of population growth is anticipated to be accommodated within the County's Urban System and 11% of population growth is to be accommodated within the County's Rural System. It is anticipated that the County will shift more towards a population increasingly concentrated within the Urban System, expanding the County's Urban System population base share of 51% in 2016 to 68% by 2051.



Figure 7
Wellington County
Population Growth by Urban and Rural Area,
2016 to 2051



Source: Watson & Associates Economists Ltd.

Urban Centre population and housing forecasts have been updated for each Primary and Secondary Urban Centre in the County. Details are provided in Appendix A. It is important to note that the growth forecasts by interim period (i.e., time periods between 2021 and 2051) are to be used as guidance for planning purposes at the local municipal level. Area Municipalities may choose to make further refinements by period (i.e., time periods between 2021 and 2051) to reflect changes in local conditions, phasing of growth and municipal servicing.

Figure 8 summarizes the population growth forecast of the Primary and Secondary Urban Centres over the 2016 and 2051 horizon, while Figure 9 provides the annual population growth rates by Primary and Secondary Urban Centre in the County. Key observations include the following:

- Fergus is anticipated to accommodate a population growth increment of 21,600 persons over the forecast period, or 617 persons annually. The population

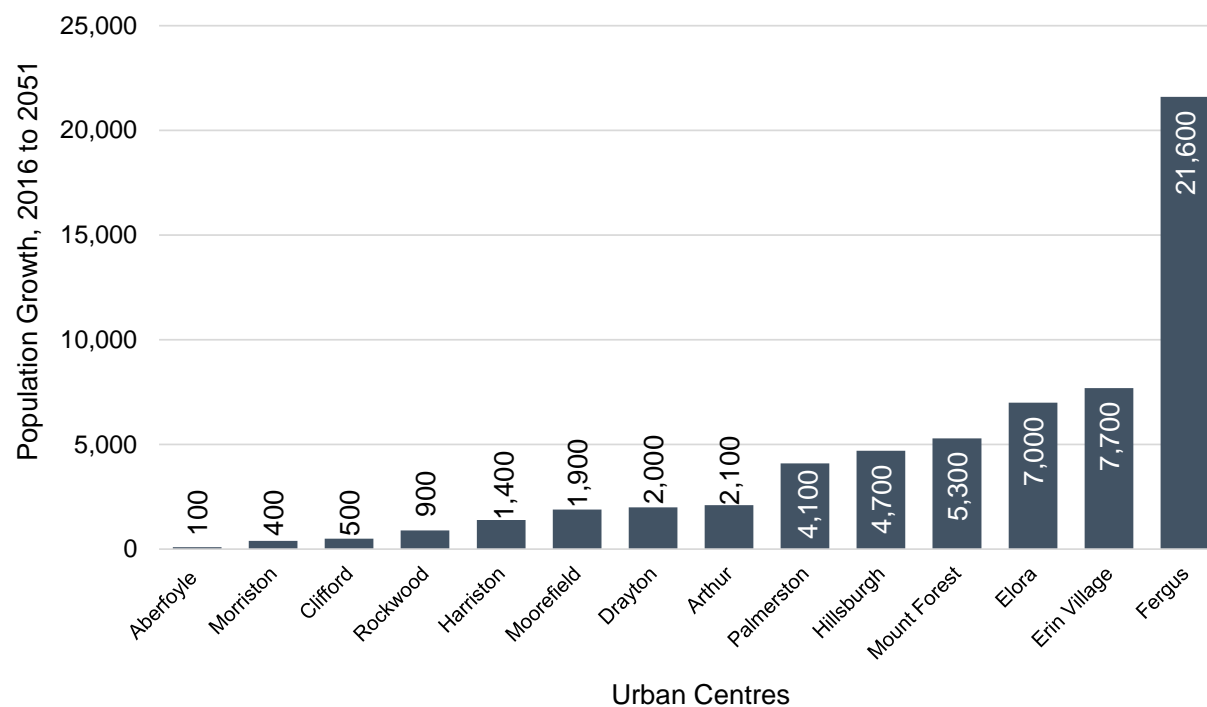


growth of Fergus represents one-third of the County's population growth over the forecast horizon and an annual population growth rate of 2.6%.

- Elora is anticipated to accommodate a population growth increment of 7,000 over the forecast period, or 200 persons annually. The annual population growth rate is forecast at 2.0%.
- Erin Village and Hillsburgh are anticipated to accommodate an additional 7,700 and 4,700 persons, respectively, over the forecast period. The annual population growth rates of Hillsburgh and Erin Village are the highest amongst the County's Primary Urban Centres at 4.3% and 3.7%, respectively.
- Mount Forest and Palmerston are anticipated to accommodate the largest share of population growth within the northern portion of the County, accommodating 150 and 117 persons, respectively, on an annual basis over the forecast period.
- The Urban Centres of Drayton, Moorefield, and Arthur are anticipated to each accommodate population growth of between 50 and 60 persons annually over the forecast horizon.
- Harriston is anticipated to accommodate population growth of 40 persons annually over the forecast horizon.
- The Urban Centres of Aberfoyle, Morriston, Clifford and Rockwood are anticipated to accommodate a modest share of the County's population growth relative to the other Urban Centres over the long-term planning horizon.



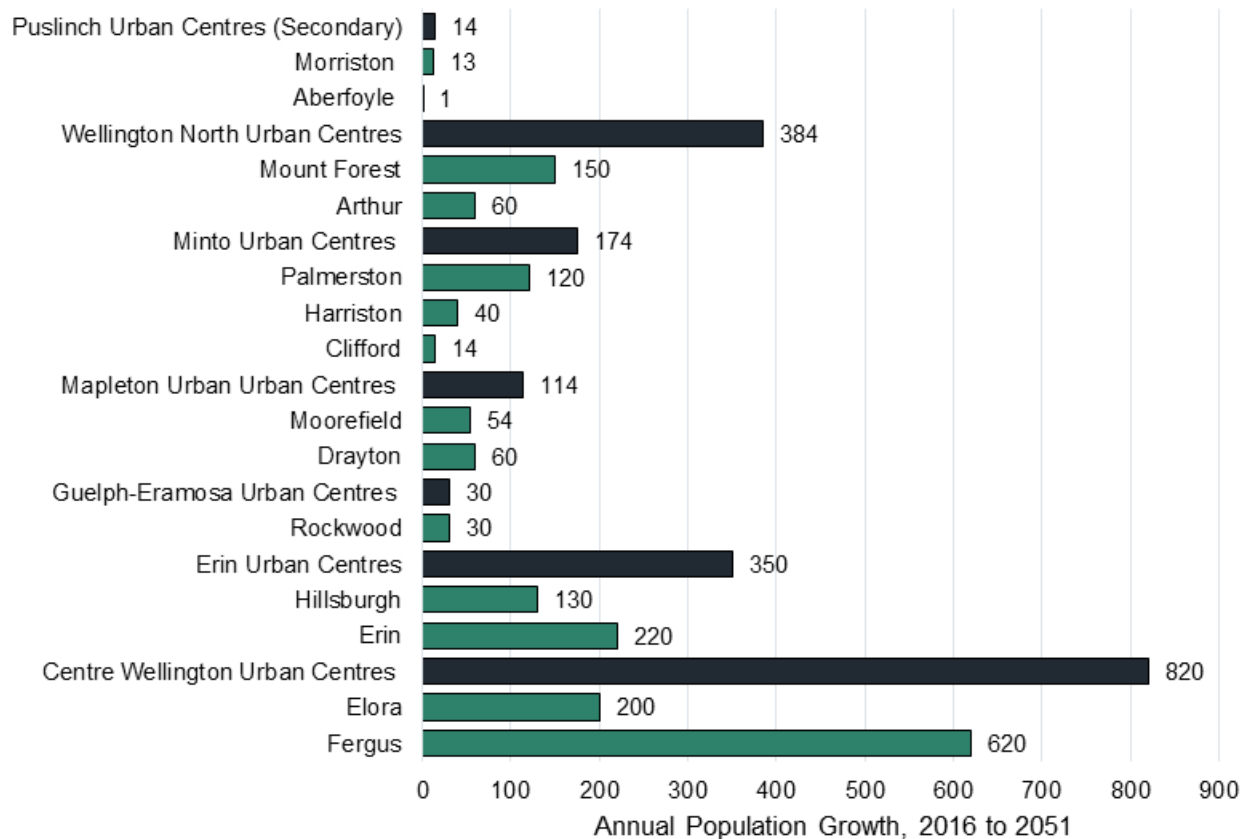
Figure 8
Wellington County
Population Growth by Urban Centre, 2016 to 2051



Source: Watson & Associates Economists Ltd.



Figure 9
Wellington County
Annual Population Growth by Urban Centre, 2016 to 2051



Source: Watson & Associates Economists Ltd.

2.3 Employment Growth Allocations

No changes were made to overall employment growth by Area Municipalities. A minor change (an adjustment of 200 employees) was made to the employment growth allocation within the Rural and Urban areas of the Township of Mapleton. The change involves a reduction in Rural Employment Area growth of 200 employees and a corresponding increase in Urban Employment Area growth of 200 employees over the 2051 forecast horizon. The change at the County-wide level is considered minor and has no impact on the percentages of employment growth allocation by Urban and Rural Systems. Appendix B includes updated employment growth allocation tables.



Appendices



Appendix A

Growth Allocations: Population Growth to 2051



APPENDIX A-1: POPULATION AND HOUSING FORECAST

A-1, Table 1
County of Wellington
Population and Housing Forecast
2016 to 2051

Year		Population (Including Census undercount) ¹	Housing Units					Persons Per Unit (P.P.U., with undercount)
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Other	Total Households	
Historical	Mid-2001	84,600	23,915	1,150	2,260	420	27,745	3.05
	Mid-2006	88,500	25,795	1,075	2,570	575	30,015	2.95
	Mid-2011	89,100	26,200	1,230	2,565	965	30,960	2.88
	Mid-2016	93,500	28,275	1,385	3,000	535	33,195	2.82
Forecast	Mid-2021	100,800	30,223	1,884	3,417	535	36,059	2.80
	Mid-2026	111,300	33,092	2,381	3,876	535	39,884	2.79
	Mid-2031	122,000	36,047	2,893	4,349	535	43,824	2.78
	Mid-2036	132,200	38,616	3,554	4,789	535	47,494	2.78
	Mid-2041	142,000	40,897	4,256	5,316	535	51,004	2.78
	Mid-2046	151,100	42,982	5,021	5,941	535	54,479	2.77
	Mid-2051	160,000	44,877	5,847	6,665	535	57,924	2.76
Growth	2001 - 2016	8,900	4,360	235	740	115	5,450	
	2016 - 2041	48,500	12,622	2,871	2,316	0	17,809	
	2016 - 2051	66,500	16,602	4,462	3,665	0	24,729	
	Annual Growth, 2001 - 2016	0.7%	1.1%	1.2%	1.9%	1.6%	1.2%	
	Annual Growth, 2016 - 2041	1.7%	1.5%	4.6%	2.3%	0.0%	1.7%	
	Annual Growth, 2016 - 2051	1.5%	1.3%	4.2%	2.3%	0.0%	1.6%	

Source: Watson & Associates Economists Ltd., 2020.

Note: Figures may not add precisely due to rounding.

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached homes as well as "other" detached homes as per Statistics Canada.

³ Includes all townhouses and apartments in duplex.

⁴ Includes all apartments with less than or greater than five storeys



A-1, Table 2a
County of Wellington
Population, Housing and Employment, 2016 to 2051

Area Municipality	Forecast Period	Total Population with Undercount ¹	Total Residential Units	Persons Per Units (PPU)	Total Urban Settlement Population	Total Urban Settlement Area Residential Units	Total Employment (including NPOW)	Employment Activity Rate ¹
Centre Wellington	2016	29,000	10,870	2.67	21,800	8,350	10,460	36.1%
	2021	34,100	12,810	2.66	26,900	10,270	12,280	36.0%
	2031	42,500	15,770	2.69	35,000	13,140	16,240	38.2%
	2041	52,300	19,360	2.70	44,700	16,650	21,280	40.7%
	2051	58,200	22,130	2.63	50,400	19,350	25,080	43.1%
	2016 - 2051	29,200	11,260		28,600	11,000	14,620	7%
Erin	2016	11,800	4,120	2.86	4,400	1,570	2,980	25.3%
	2021	12,000	4,230	2.84	4,500	1,610	3,140	26.2%
	2031	16,700	5,970	2.80	8,600	3,120	4,090	24.5%
	2041	20,200	7,280	2.77	11,500	4,250	5,290	26.2%
	2051	26,300	9,200	2.86	16,800	5,950	6,210	23.6%
	2016 - 2051	14,500	5,080		12,400	4,380	3,230	-2%
Guelph-Eramosa	2016	13,200	4,500	2.93	4,900	1,730	5,720	43.3%
	2021	13,600	4,650	2.92	5,200	1,880	5,990	44.0%
	2031	14,100	4,870	2.90	5,600	2,060	6,180	43.8%
	2041	14,600	5,020	2.91	5,900	2,160	6,330	43.4%
	2051	14,700	5,110	2.88	5,800	2,180	6,790	46.2%
	2016 - 2051	1,500	610		900	450	1,070	3%
Puslinch	2016	7,600	2,710	2.80	0	0	5,630	74.1%
	2021	7,900	2,850	2.77	0	0	5,820	73.7%
	2031	8,400	3,020	2.78	0	0	6,310	75.1%
	2041	9,700	3,450	2.81	0	0	6,990	72.1%
	2051	10,000	3,560	2.81	0	0	7,920	79.2%
	2016 - 2051	2,400	850		0	0	2,290	5%

Source: Watson & Associates Economists Ltd.

¹Includes population undercount at approximately 3%. Figures have been rounded and may not add up precisely.

²Urban settlement areas include all urban areas within the County of Wellington with a delineated Growth Plan built boundary by the province.



A-1, Table 2b
County of Wellington
Population, Housing and Employment, 2016 to 2051

Area Municipality	Forecast Period	Total Population with Undercount ¹	Total Residential Units	Persons Per Units (PPU)	Total Urban Settlement Population	Total Urban Settlement Area Residential Units	Total Employment (including NPOW)	Employment Activity Rate ¹
Mapleton	2016	10,800	3,150	3.43	2,800	980	4,060	37.6%
	2021	11,100	3,260	3.40	2,900	1,020	4,430	39.9%
	2031	12,400	3,780	3.28	4,100	1,460	5,240	42.3%
	2041	14,100	4,380	3.22	5,700	2,050	6,190	43.9%
	2051	15,200	4,820	3.15	6,800	2,460	7,000	46.1%
	2016 - 2051	4,400	1,670		4,000	1,480	2,940	8%
Minto	2016	8,900	3,260	2.73	5,800	2,220	4,030	45.3%
	2021	9,300	3,400	2.74	6,100	2,360	4,170	44.8%
	2031	11,900	4,280	2.78	8,600	3,070	4,750	39.9%
	2041	13,400	4,820	2.78	10,000	3,520	5,530	41.3%
	2051	15,200	5,460	2.78	11,800	4,070	6,510	42.8%
	2016 - 2051	6,300	2,200		6,000	1,850	2,480	-2%
Wellington North	2016	12,300	4,670	2.63	7,800	3,210	7,080	57.6%
	2021	12,700	4,860	2.61	8,200	3,370	7,270	57.2%
	2031	16,100	6,130	2.63	11,500	4,590	8,340	51.8%
	2041	17,700	6,700	2.64	13,000	5,100	9,450	53.4%
	2051	20,500	7,660	2.68	15,400	5,940	10,500	51.2%
	2016 - 2051	8,200	2,990		7,600	2,730	3,420	-6%
County of Wellington	2016	93,600	33,280	2.81	47,500	18,060	39,960	42.7%
	2021	100,700	36,060	2.79	53,800	20,510	43,100	42.8%
	2031	122,100	43,820	2.79	73,400	27,440	51,150	41.9%
	2041	142,000	51,010	2.78	90,800	33,730	61,060	43.0%
	2051	160,100	57,940	2.76	107,000	39,950	70,010	43.7%
	2016 - 2051	66,500	24,660		59,500	21,890	30,050	1%

Source: Watson & Associates Economists Ltd.

¹Includes population undercount at approximately 3%. Figures have been rounded and may not add up precisely.

²Urban settlement areas include all urban areas within the County of Wellington with a delineated Growth Plan built boundary by the province.



A-1, Table 3a
County of Wellington
Housing Forecast by Municipality, 2016 to 2051

Area Municipality	Forecast Period	Singles/Semi-Detached	Townhomes	Apartments	Others	Total Residential Units
Centre Wellington	2016	8,500	680	1,530	160	10,870
	2021	9,740	1,030	1,880	160	12,810
	2031	11,900	1,360	2,350	160	15,770
	2041	14,340	2,160	2,700	160	19,360
	2051	15,260	3,150	3,560	160	22,130
	2016 - 2051	6,760	2,470	2,030	0	11,260
Erin	2016	3,810	40	120	150	4,120
	2021	3,910	40	130	150	4,230
	2031	5,240	340	240	150	5,970
	2041	5,920	550	660	150	7,280
	2051	7,440	730	880	150	9,200
	2016 - 2051	3,630	690	760	0	5,080
Guelph-Eramosa	2016	4,100	240	130	30	4,500
	2021	4,240	250	130	30	4,650
	2031	4,440	260	140	30	4,870
	2041	4,570	270	150	30	5,020
	2051	4,600	280	200	30	5,110
	2016 - 2051	500	40	70	0	610
Puslinch	2016	2,560	40	20	90	2,710
	2021	2,700	40	20	90	2,850
	2031	2,870	40	20	90	3,020
	2041	3,300	40	20	90	3,450
	2051	3,410	40	20	90	3,560
	2016 - 2051	850	0	0	0	850

Note: May not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.

¹Includes population undercount at approximately 3%. Figures have been rounded and may not add up precisely.

²Urban settlement areas include all urban areas within the County of Wellington with a delineated Growth Plan built boundary by the province.



A-1, Table 3b (Continued)
County of Wellington
Housing Forecast by Municipality, 2016 to 2051

Area Municipality	Forecast Period	Singles/Semi-Detached	Townhomes	Apartments	Others	Total Residential Units
Mapleton	2016	2,920	50	110	70	3,150
	2021	3,020	50	120	70	3,260
	2031	3,380	150	180	70	3,780
	2041	3,820	240	250	70	4,380
	2051	4,090	340	320	70	4,820
	2016 - 2051	1,170	290	210	0	1,670
Minto	2016	2,760	110	370	20	3,260
	2021	2,830	150	400	20	3,400
	2031	3,570	240	450	20	4,280
	2041	3,920	370	510	20	4,820
	2051	4,330	520	590	20	5,460
	2016 - 2051	1,570	410	220	0	2,200
Wellington North	2016	3,660	260	730	20	4,670
	2021	3,780	330	730	20	4,860
	2031	4,640	500	970	20	6,130
	2041	5,020	630	1,030	20	6,700
	2051	5,760	790	1,090	20	7,660
	2016 - 2051	2,100	530	360	0	2,990
County of Wellington	2016	28,310	1,420	3,010	540	33,280
	2021	30,220	1,890	3,410	540	36,060
	2031	36,040	2,890	4,350	540	43,820
	2041	40,890	4,260	5,320	540	51,010
	2051	44,890	5,850	6,660	540	57,940
	2016 - 2051	16,580	4,430	3,650	0	24,660

Note: May not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.

¹Includes population undercount at approximately 3%. Figures have been rounded and may not add up precisely.

²Urban settlement areas include all urban areas within the County of Wellington with a delineated Growth Plan built boundary by the province.



APPENDIX A-2: DETAILED POPULATION AND HOUSING FORECASTS BY AREA MUNICIPALITY



A-2, Table 1
Township of Centre Wellington
Population and Housing Forecast, 2016 to 2051

Centre Wellington								
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	28,200	29,000	8,500	680	1,530	160	10,870	2.668
2021	33,100	34,100	9,740	1,030	1,880	160	12,810	2.662
2026	37,200	38,300	10,840	1,290	2,080	160	14,370	2.665
2031	41,200	42,500	11,900	1,360	2,350	160	15,770	2.695
2036	46,000	47,400	13,160	1,730	2,520	160	17,570	2.698
2041	50,800	52,300	14,340	2,160	2,700	160	19,360	2.701
2046	53,000	54,600	14,650	2,610	3,180	160	20,600	2.650
2051	56,500	58,200	15,260	3,150	3,560	160	22,130	2.630
2016 - 2041	22,600	23,300	5,840	1,480	1,170	-	8,490	
2016 - 2051	28,300	29,200	6,760	2,470	2,030	-	11,260	

A-2, Table 2
Town of Erin
Population and Housing Forecast, 2016 to 2051

Erin								
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	11,400	11,800	3,810	40	120	150	4,120	2.864
2021	11,700	12,000	3,910	40	130	150	4,230	2.837
2026	13,200	13,600	4,370	70	180	150	4,770	2.851
2031	16,200	16,700	5,240	340	240	150	5,970	2.797
2036	17,900	18,400	5,590	450	430	150	6,620	2.779
2041	19,600	20,200	5,920	550	660	150	7,280	2.775
2046	22,700	23,300	6,760	590	680	150	8,180	2.848
2051	25,500	26,300	7,440	730	880	150	9,200	2.859
2016 - 2041	8,200	8,400	2,110	510	540	-	3,160	
2016 - 2051	14,100	14,500	3,630	690	760	-	5,080	



A-2, Table 3
Township of Guelph-Eramosa
Population and Housing Forecast, 2016 to 2051

Guelph/Eramosa								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	12,900	13,200	4,100	240	130	30	4,500	2.933
2021	13,200	13,600	4,240	250	130	30	4,650	2.925
2026	13,600	14,000	4,380	250	140	30	4,800	2.917
2031	13,700	14,100	4,440	260	140	30	4,870	2.895
2036	13,900	14,300	4,500	270	150	30	4,950	2.889
2041	14,200	14,600	4,570	270	150	30	5,020	2.908
2046	14,200	14,600	4,570	280	180	30	5,060	2.885
2051	14,300	14,700	4,600	280	200	30	5,110	2.877
2016 - 2041	1,300	1,400	470	30	20	-	520	
2016 - 2051	1,400	1,500	500	40	70	-	610	

A-2, Table 4
Township of Mapleton
Population and Housing Forecast, 2016 to 2051

Mapleton								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	10,500	10,800	2,920	50	110	70	3,150	3.429
2021	10,800	11,100	3,020	50	120	70	3,260	3.405
2026	11,400	11,800	3,200	110	150	70	3,530	3.343
2031	12,000	12,400	3,380	150	180	70	3,780	3.280
2036	12,500	12,900	3,540	150	200	70	3,960	3.258
2041	13,700	14,100	3,820	240	250	70	4,380	3.219
2046	14,200	14,600	3,950	330	260	70	4,610	3.167
2051	14,700	15,200	4,090	340	320	70	4,820	3.154
2016 - 2041	3,200	3,300	900	190	140	-	1,230	
2016 - 2051	4,200	4,400	1,170	290	210	-	1,670	



A-2, Table 5
Town of Minto
Population and Housing Forecast, 2016 to 2051

Minto								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	8,700	8,900	2,760	110	370	20	3,260	2.730
2021	9,000	9,300	2,830	150	400	20	3,400	2.735
2026	10,300	10,600	3,210	200	420	20	3,850	2.753
2031	11,500	11,900	3,570	240	450	20	4,280	2.780
2036	12,600	12,900	3,840	310	480	20	4,650	2.774
2041	13,000	13,400	3,920	370	510	20	4,820	2.780
2046	13,800	14,200	4,110	440	550	20	5,120	2.773
2051	14,800	15,200	4,330	520	590	20	5,460	2.784
2016 - 2041	4,300	4,500	1,160	260	140	-	1,560	
2016 - 2051	6,100	6,300	1,570	410	220	-	2,200	

A-2, Table 6
Township of Wellington North
Population and Housing Forecast, 2016 to 2051

Wellington North								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	11,900	12,300	3,660	260	730	20	4,670	2.634
2021	12,400	12,700	3,780	330	730	20	4,860	2.613
2026	14,200	14,700	4,260	420	880	20	5,580	2.634
2031	15,600	16,100	4,640	500	970	20	6,130	2.626
2036	16,900	17,400	4,960	610	990	20	6,580	2.644
2041	17,200	17,700	5,020	630	1,030	20	6,700	2.642
2046	19,100	19,600	5,520	760	1,080	20	7,380	2.656
2051	19,900	20,500	5,760	790	1,090	20	7,660	2.676
2016 - 2041	5,300	5,400	1,360	370	300	-	2,030	
2016 - 2051	8,000	8,200	2,100	530	360	-	2,990	



A-2, Table 7
Township of Puslinch
Population and Housing Forecast, 2016 to 2051

Puslinch								
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	7,300	7,600	2,560	40	20	90	2,710	2.804
2021	7,700	7,900	2,700	40	20	90	2,850	2.772
2026	8,000	8,300	2,820	40	20	90	2,970	2.795
2031	8,100	8,400	2,870	40	20	90	3,020	2.781
2036	8,600	8,800	3,020	40	20	90	3,170	2.776
2041	9,400	9,700	3,300	40	20	90	3,450	2.812
2046	9,600	9,900	3,360	40	20	90	3,510	2.821
2051	9,700	10,000	3,410	40	20	90	3,560	2.809
2016 - 2041	2,100	2,100	740	-	-	-	740	
2016 - 2051	2,400	2,400	850	-	-	-	850	

Source: Watson & Associates Economists Ltd., 2020.

Note: Figures may not add precisely due to rounding.

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached homes as well as "other" detached homes as per Statistics Canada.

³ Includes all townhouses and apartments in duplex.

⁴ Includes all apartments with less than or greater than five storeys.



A-2, Table 8
County of Wellington
Housing Forecast by Area Municipality, 2016 to 2051

Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	10,870	4,110	4,490	3,140	3,250	4,660	2,700	33,220
2021	12,810	4,230	4,650	3,260	3,410	4,860	2,850	36,070
2026	14,380	4,770	4,800	3,540	3,850	5,580	2,970	39,890
2031	15,770	5,980	4,870	3,780	4,280	6,130	3,020	43,830
2036	17,570	6,630	4,950	3,960	4,640	6,590	3,170	47,510
2041	19,360	7,280	5,030	4,380	4,820	6,690	3,440	51,000
2046	20,600	8,180	5,060	4,600	5,190	7,380	3,510	54,520
2051	22,130	9,200	5,110	4,820	5,460	7,660	3,550	57,930
Share of 2016 County Households	33%	12%	14%	9%	10%	14%	8%	100%
Share of 2051 County Households	38%	16%	9%	8%	9%	13%	6%	100%
Housing Growth								
2016 - 2051	11,260	5,090	620	1,680	2,210	3,000	850	24,710
Annual Growth Rate, 2016 - 2051	2.1%	2.3%	0.4%	1.2%	1.5%	1.4%	0.8%	1.6%
Share of County Household Growth, 2016-2051	46%	21%	3%	7%	9%	12%	3%	100%

Note: Above figure includes "other" dwellings of approximately 540 units.
Source: Watson & Associates Economists Ltd.



A-2, Table 9
County of Wellington
Population Forecast by Area Municipality, 2016 to 2051

Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	29,000	11,800	13,200	10,800	8,900	12,300	7,600	93,600
2021	34,100	12,000	13,600	11,100	9,300	12,700	7,900	100,700
2026	38,300	13,600	14,000	11,800	10,600	14,700	8,300	111,300
2031	42,500	16,700	14,100	12,400	11,900	16,100	8,400	122,100
2036	47,400	18,400	14,300	12,900	12,900	17,400	8,800	132,100
2041	52,300	20,200	14,600	14,100	13,400	17,700	9,700	142,000
2046	54,600	23,300	14,600	14,600	14,500	19,600	9,900	151,100
2051	58,200	26,300	14,700	15,200	15,200	20,500	10,000	160,000
Share of 2016 County Population	31%	13%	14%	12%	10%	13%	8%	100%
Share of 2051 County Population	36%	16%	9%	10%	10%	13%	6%	100%
Population Growth								
2016 - 2051	29,200	14,500	1,500	4,400	6,300	8,200	2,400	66,400
Annual Growth Rate, 2016 - 2051	2.0%	2.3%	0.3%	1.0%	1.5%	1.5%	0.8%	1.5%
Share of County Population Growth, 2016-2051	44%	22%	2%	7%	9%	12%	4%	100%

May not add up precisely due to rounding.
Source: Watson & Associates Economists Ltd.



APPENDIX A-3: POPULATION AND HOUSING FORECASTS BY URBAN SETTLEMENT AREA



A-3, Table 1
Township of Centre Wellington
Population and Housing Forecast, 2016 to 2051

Fergus							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	14,300	14,700	4,060	470	1,170	5,690	2.51
2021	18,500	19,100	5,100	790	1,410	7,310	2.53
2026	19,500	20,100	5,290	960	1,530	7,790	2.50
2031	22,900	23,600	6,200	1,010	1,770	8,980	2.55
2036	26,900	27,700	7,200	1,340	1,930	10,470	2.57
2041	30,700	31,600	8,220	1,520	2,100	11,840	2.59
2046	32,600	33,600	8,440	1,960	2,480	12,870	2.53
2051	35,300	36,300	8,850	2,430	2,785	14,060	2.51

2016 - 2041	16,400	16,900	4,160	1,050	930	6,150
2016 - 2051	21,000	21,600	4,790	1,960	1,615	8,370

Elora/Salem							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	6,900	7,100	2,090	210	370	2,660	2.59
2021	7,600	7,800	2,250	240	460	2,960	2.57
2026	10,500	10,900	3,120	340	550	4,000	2.63
2031	11,100	11,400	3,240	350	570	4,160	2.66
2036	11,800	12,100	3,450	390	590	4,430	2.66
2041	12,700	13,100	3,580	650	600	4,820	2.63
2046	12,900	13,300	3,630	650	700	4,990	2.60
2051	13,600	14,100	3,780	720	780	5,280	2.58

2016 - 2041	5,800	6,000	1,490	440	230	2,160
2016 - 2051	6,700	7,000	1,690	510	410	2,620

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	7,000	7,200	2,350	0	0	2,350	2.99
2021	7,100	7,200	2,390	0	0	2,390	2.96
2026	7,100	7,300	2,430	0	0	2,430	2.94
2031	7,200	7,400	2,470	0	0	2,470	2.92
2036	7,300	7,500	2,510	0	0	2,510	2.91
2041	7,400	7,600	2,550	0	0	2,550	2.92
2046	7,500	7,700	2,590	0	0	2,590	2.90
2051	7,600	7,800	2,630	0	0	2,630	2.89

2016 - 2041	400	400	200	-	-	200
2016 - 2051	600	600	280	-	-	280



A-3, Table 2

Town of Erin

Population and Housing Forecast, 2016 to 2051

Erin (Village)							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	3,000	3,000	940	20	90	1,040	2.88
2021	3,000	3,100	950	20	100	1,070	2.80
2026	3,700	3,900	1,170	40	120	1,330	2.78
2031	5,600	5,800	1,680	220	180	2,080	2.69
2036	6,700	6,900	1,910	280	310	2,500	2.68
2041	7,700	7,900	2,040	340	530	2,910	2.65
2046	9,200	9,400	2,420	380	540	3,340	2.75
2051	10,400	10,700	2,740	440	590	3,770	2.76

2016 - 2041	4,700	4,900	1,100	320	440	1,870
2016 - 2051	7,400	7,700	1,800	420	500	2,730

Hillsburgh							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	1,400	1,400	490	10	30	530	2.64
2021	1,400	1,400	500	10	30	540	2.59
2026	1,900	1,900	630	30	60	720	2.64
2031	2,700	2,800	860	110	60	1,040	2.60
2036	3,100	3,100	910	160	110	1,190	2.61
2041	3,500	3,600	1,000	200	130	1,340	2.61
2046	4,800	4,900	1,380	210	140	1,720	2.79
2051	5,900	6,100	1,610	280	290	2,180	2.71

2016 - 2041	2,100	2,200	510	190	100	810
2016 - 2051	4,500	4,700	1,120	270	260	1,650

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	7,100	7,300	2,380	10	0	2,390	2.97
2021	7,300	7,500	2,460	10	0	2,470	2.96
2026	7,600	7,800	2,570	10	0	2,580	2.95
2031	7,800	8,100	2,690	10	0	2,700	2.89
2036	8,100	8,400	2,780	10	0	2,790	2.90
2041	8,500	8,700	2,870	10	0	2,880	2.95
2046	8,700	9,000	2,960	10	0	2,970	2.93
2051	9,100	9,400	3,090	10	0	3,100	2.94

2016 - 2041	1,400	1,400	490	-	-	490
2016 - 2051	2,000	2,100	710	-	-	710



A-3, Table 3
Township of Guelph/Eramosa
Population and Housing Forecast, 2016 to 2051

Rockwood							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	4,700	4,900	1,440	210	90	1,740	2.70
2021	5,100	5,200	1,570	220	90	1,880	2.71
2026	5,400	5,600	1,690	230	90	2,010	2.69
2031	5,500	5,600	1,730	240	100	2,070	2.66
2036	5,600	5,700	1,760	240	100	2,100	2.67
2041	5,700	5,900	1,800	250	110	2,160	2.64
2046	5,700	5,800	1,780	250	130	2,160	2.64
2051	5,700	5,800	1,780	250	150	2,180	2.61

2016 - 2041	1,000	1,000	360	40	20	420
2016 - 2051	1,000	900	340	40	60	280

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	8,100	8,300	2,660	30	40	2,730	2.97
2021	8,100	8,400	2,670	30	50	2,740	2.96
2026	8,200	8,500	2,690	30	50	2,760	2.97
2031	8,300	8,500	2,710	30	50	2,780	2.99
2036	8,400	8,600	2,740	30	50	2,810	2.99
2041	8,500	8,700	2,770	30	50	2,840	2.99
2046	8,500	8,800	2,800	30	50	2,870	2.96
2051	8,600	8,900	2,820	30	50	2,890	2.98

2016 - 2041	400	400	110	-	10	110
2016 - 2051	500	600	160	-	10	160

Delete and Replace
A-3, Table 3
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A-3, Table 3
Township of Guelph/Eramosa
Population and Housing Forecast, 2016 to 2051

Rockwood							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	4,700	4,900	1,440	210	90	1,740	2.70
2021	5,100	5,200	1,570	220	90	1,880	2.71
2026	5,400	5,600	1,690	230	90	2,010	2.69
2031	5,500	5,600	1,730	240	100	2,070	2.66
2036	5,600	5,700	1,760	240	100	2,100	2.67
2041	5,700	5,800	1,780	250	110	2,140	2.66
2046	5,700	5,800	1,780	250	130	2,160	2.64
2051	5,700	5,800	1,780	250	150	2,180	2.61

2016 - 2041	1,000	900	340	40	20	400
2016 - 2051	1,000	900	340	40	60	440

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	8,100	8,300	2,660	30	40	2,730	2.97
2021	8,100	8,400	2,670	30	50	2,740	2.96
2026	8,200	8,500	2,690	30	50	2,760	2.97
2031	8,300	8,500	2,710	30	50	2,780	2.99
2036	8,400	8,600	2,740	30	50	2,810	2.99
2041	8,500	8,700	2,770	30	50	2,840	2.99
2046	8,500	8,800	2,800	30	50	2,870	2.96
2051	8,600	8,900	2,820	30	50	2,890	2.98

2016 - 2041	400	400	110	-	10	110
2016 - 2051	500	600	160	-	10	160



A-3, Table 4
Township of Mapleton
Population and Housing Forecast, 2016 to 2051

Drayton							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,200	2,300	690	40	80	810	2.72
2021	2,300	2,400	720	40	90	850	2.71
2026	2,600	2,700	780	80	100	960	2.71
2031	2,900	3,000	880	110	120	1,110	2.61
2036	3,100	3,200	920	110	130	1,160	2.67
2041	3,700	3,800	1,070	170	160	1,400	2.64
2046	4,000	4,100	1,130	220	160	1,510	2.65
2051	4,200	4,300	1,160	230	190	1,580	2.66

2016 - 2041	1,500	1,500	380	130	80	590
2016 - 2051	2,000	2,000	470	190	110	770

Moorefield							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	500	600	140	10	30	170	2.94
2021	500	600	140	10	30	180	2.78
2026	800	800	190	30	50	270	2.96
2031	1,000	1,100	260	40	60	360	2.78
2036	1,400	1,400	360	40	70	470	2.98
2041	1,900	1,900	490	70	90	660	2.88
2046	2,100	2,200	540	110	100	740	2.84
2051	2,500	2,500	640	110	120	880	2.84

2016 - 2041	1,400	1,300	350	60	60	490
2016 - 2051	2,000	1,900	500	100	90	710

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	7,800	8,000	2,090	0	0	2,090	3.73
2021	7,900	8,200	2,160	0	0	2,160	3.66
2026	8,100	8,300	2,240	0	0	2,240	3.62
2031	8,100	8,300	2,250	0	0	2,250	3.60
2036	8,100	8,300	2,260	0	0	2,260	3.58
2041	8,100	8,300	2,270	0	0	2,270	3.57
2046	8,100	8,300	2,280	0	0	2,280	3.55
2051	8,100	8,300	2,290	0	0	2,290	3.54

2016 - 2041	300	300	180	-	-	180
2016 - 2051	300	300	200	-	-	200



A-3, Table 5
Town of Minto
Population and Housing Forecast, 2016 to 2051

Clifford							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	830	860	280	30	40	350	2.37
2021	910	940	300	30	50	380	2.39
2026	990	1,010	310	40	60	410	2.41
2031	1,060	1,090	320	50	70	440	2.41
2036	1,130	1,170	330	60	80	470	2.40
2041	1,210	1,250	340	70	90	500	2.42
2046	1,280	1,320	350	80	110	530	2.42
2051	1,360	1,400	360	90	120	560	2.43

2016 - 2041	380	390	60	40	50	150
2016 - 2051	530	540	80	60	80	210

Harriston							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,100	2,100	610	10	160	780	2.69
2021	2,200	2,200	620	30	170	830	2.65
2026	2,500	2,600	720	50	170	940	2.66
2031	2,700	2,800	750	70	180	1,010	2.67
2036	2,900	3,000	800	100	190	1,090	2.66
2041	3,000	3,100	810	130	200	1,140	2.63
2046	3,200	3,300	860	140	210	1,210	2.64
2051	3,400	3,500	890	180	220	1,280	2.66

2016 - 2041	900	1,000	200	120	40	360
2016 - 2051	1,300	1,400	280	170	60	500

Palmerston							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,700	2,800	870	70	170	1,100	2.45
2021	2,900	2,900	890	90	180	1,160	2.50
2026	3,700	3,800	1,140	110	180	1,430	2.59
2031	4,600	4,800	1,430	130	190	1,750	2.63
2036	5,300	5,400	1,620	150	200	1,970	2.69
2041	5,500	5,600	1,650	170	220	2,040	2.70
2046	6,200	6,400	1,840	220	240	2,290	2.71
2051	6,700	6,900	1,950	250	260	2,460	2.72

2016 - 2041	2,800	2,800	780	100	50	940
2016 - 2051	4,000	4,100	1,080	180	90	1,360

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	3,000	3,100	1,010	0	0	1,010	2.97
2021	3,100	3,200	1,030	0	0	1,030	3.01
2026	3,100	3,200	1,050	0	0	1,050	2.95
2031	3,200	3,300	1,070	0	0	1,070	2.99
2036	3,200	3,300	1,100	0	0	1,100	2.91
2041	3,300	3,400	1,120	0	0	1,120	2.95
2046	3,300	3,400	1,130	0	0	1,130	2.92
2051	3,400	3,500	1,140	0	0	1,140	2.98

2016 - 2041	300	300	110	-	-	110
2016 - 2051	400	400	130	-	-	130



A-3, Table 6
Township of Wellington North
Population and Housing Forecast, 2016 to 2051

Arthur							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,500	2,600	740	100	170	1,010	2.48
2021	2,600	2,700	750	120	170	1,040	2.50
2026	3,400	3,500	940	140	240	1,320	2.58
2031	3,800	3,900	1,060	170	260	1,490	2.55
2036	4,100	4,200	1,110	200	280	1,590	2.58
2041	4,200	4,400	1,140	200	310	1,650	2.55
2046	4,500	4,700	1,200	240	330	1,770	2.54
2051	4,700	4,800	1,240	250	340	1,830	2.57

2016 - 2041	1,700	1,800	400	100	140	640
2016 - 2051	2,200	2,200	500	150	170	820

Mount Forest							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	5,100	5,200	1,500	160	560	2,220	2.30
2021	5,400	5,500	1,560	210	560	2,330	2.32
2026	6,500	6,700	1,840	270	640	2,750	2.36
2031	7,400	7,600	2,060	330	710	3,100	2.39
2036	8,200	8,500	2,290	410	710	3,410	2.40
2041	8,300	8,600	2,300	430	720	3,450	2.41
2046	9,700	10,000	2,670	530	740	3,940	2.46
2051	10,200	10,500	2,820	540	750	4,110	2.48

2016 - 2041	3,200	3,400	800	270	160	1,230
2016 - 2051	5,100	5,300	1,320	380	190	1,890

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	4,300	4,400	1,430	0	0	1,430	3.01
2021	4,400	4,500	1,470	0	0	1,470	2.99
2026	4,400	4,500	1,480	0	0	1,480	2.97
2031	4,500	4,600	1,520	0	0	1,520	2.96
2036	4,600	4,700	1,570	0	0	1,570	2.93
2041	4,600	4,800	1,570	0	0	1,570	2.93
2046	4,800	5,000	1,650	0	0	1,650	2.91
2051	5,000	5,100	1,700	0	0	1,700	2.94

2016 - 2041	300	400	140	-	-	140
2016 - 2051	700	700	270	-	-	270



A-3, Table 7
Township of Puslinch
Population and Housing Forecast, 2016 to 2051

Aberfoyle							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	300	300	140	20	10	170	2.07
2021	300	300	140	20	10	170	2.08
2026	300	400	140	20	10	170	2.08
2031	300	400	140	20	10	170	2.08
2036	300	400	150	20	10	180	2.09
2041	400	400	150	20	10	180	2.09
2046	400	400	150	20	10	180	2.10
2051	400	400	150	20	10	180	2.10
2016 - 2041	100	100	10	-	-	10	
2016 - 2051	100	100	10	-	-	10	

Morrison							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	500	500	140	0	20	160	3.13
2021	500	500	140	0	20	160	3.13
2026	600	600	180	0	20	200	3.00
2031	600	600	190	0	20	210	2.86
2036	700	700	220	0	20	240	2.92
2041	800	900	260	0	20	280	2.86
2046	900	900	270	0	20	290	3.10
2051	900	900	280	0	20	300	3.00
2016 - 2041	300	400	120	-	-	120	
2016 - 2051	400	400	140	-	-	140	

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	6,600	6,700	2,270	20	0	2,280	2.89
2021	6,900	7,100	2,420	20	0	2,440	2.83
2026	7,100	7,300	2,490	20	0	2,510	2.83
2031	7,200	7,400	2,540	20	0	2,560	2.81
2036	7,500	7,800	2,660	20	0	2,680	2.80
2041	8,300	8,500	2,890	20	0	2,910	2.85
2046	8,400	8,600	2,940	20	0	2,960	2.84
2051	8,500	8,700	2,970	20	0	2,990	2.84
2016 - 2041	1,700	1,800	620	-	-	630	
2016 - 2051	1,900	2,000	700	-	-	710	

Note: Urban Centres in Puslinch are not summarized at the County-Wide level as Urban Settlement Areas. Aberfoyle and Morrison are grouped as “Rural” at the County-Wide level.



Appendix B

Growth Allocations: Employment Growth to 2051



B-1, Table 1
Township of Centre Wellington
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	2,540	6,520	9,060	55	590	645	9,705	93%	7%
	2011	2,570	6,875	9,445	55	730	785	10,230	92%	8%
	2016	2,230	7,610	9,840	55	560	615	10,455	94%	6%
Forecast	2021	2,510	9,070	11,580	55	600	655	12,235	95%	5%
	2026	2,810	10,540	13,350	55	590	645	13,995	95%	5%
	2031	3,410	12,115	15,525	55	650	705	16,230	96%	4%
	2036	4,010	13,795	17,805	55	660	715	18,520	96%	4%
	2041	4,810	15,740	20,550	55	670	725	21,275	97%	3%
	2046	5,410	17,130	22,540	55	680	735	23,275	97%	3%
	2051	5,910	18,420	24,330	55	690	745	25,075	97%	3%
Incremental	2016 - 2021	280	1,460	1,740	0	40	40	1,780	98%	2%
	2016 - 2026	580	2,930	3,510	0	30	30	3,540	99%	1%
	2016 - 2031	1,180	4,505	5,685	0	90	90	5,775	98%	2%
	2016 - 2036	1,780	6,185	7,965	0	100	100	8,065	99%	1%
	2016 - 2041	2,580	8,130	10,710	0	110	110	10,820	99%	1%
	2016 - 2046	3,180	9,520	12,700	0	120	120	12,820	99%	1%
	2016 - 2051	3,680	10,810	14,490	0	130	130	14,620	99%	1%



B-1, Table 2
Town of Erin
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	780	1,570	2,350	0	620	620	2,970	79%	21%
	2011	880	1,560	2,440	0	590	590	3,030	81%	19%
	2016	900	1,345	2,245	0	730	730	2,975	75%	25%
Forecast	2021	950	1,445	2,395	0	735	735	3,130	77%	23%
	2026	1,050	1,705	2,755	0	740	740	3,495	79%	21%
	2031	1,150	2,190	3,340	0	745	745	4,085	82%	18%
	2036	1,270	2,730	4,000	0	750	750	4,750	84%	16%
	2041	1,380	3,150	4,530	0	755	755	5,285	86%	14%
	2046	1,490	3,665	5,155	0	760	760	5,915	87%	13%
	2051	1,700	3,735	5,435	0	770	770	6,205	88%	12%
Incremental	2016 - 2021	50	100	150	0	5	5	155	97%	3%
	2016 - 2026	150	360	510	0	10	10	520	98%	2%
	2016 - 2031	250	845	1,095	0	15	15	1,110	99%	1%
	2016 - 2036	370	1,385	1,755	0	20	20	1,775	99%	1%
	2016 - 2041	480	1,805	2,285	0	25	25	2,310	99%	1%
	2016 - 2046	590	2,320	2,910	0	30	30	2,940	99%	1%
	2016 - 2051	800	2,390	3,190	0	40	40	3,230	99%	1%



B-1, Table 3
Township of Guelph/Eramosa
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	0	1,200	1,200	1,380	2,060	3,440	4,640	26%	74%
	2011	0	1,300	1,300	1,000	2,170	3,170	4,470	29%	71%
	2016	0	1,600	1,600	1,580	2,540	4,120	5,720	28%	72%
Forecast	2021	0	1,650	1,650	1,780	2,555	4,335	5,985	28%	72%
	2026	0	1,680	1,680	1,810	2,590	4,400	6,080	28%	72%
	2031	0	1,710	1,710	1,840	2,625	4,465	6,175	28%	72%
	2036	0	1,720	1,720	1,880	2,650	4,530	6,250	28%	72%
	2041	0	1,740	1,740	1,920	2,670	4,590	6,330	27%	73%
	2046	0	1,750	1,750	2,070	2,780	4,850	6,600	27%	73%
	2051	0	1,780	1,780	2,190	2,820	5,010	6,790	26%	74%
Incremental	2016 - 2021	0	50	50	200	15	215	265	19%	81%
	2016 - 2026	0	80	80	230	50	280	360	22%	78%
	2016 - 2031	0	110	110	260	85	345	455	24%	76%
	2016 - 2036	0	120	120	300	110	410	530	23%	77%
	2016 - 2041	0	140	140	340	130	470	610	23%	77%
	2016 - 2046	0	150	150	490	240	730	880	17%	83%
	2016 - 2051	0	180	180	610	280	890	1,070	17%	83%



B-1, Table 4
Township of Mapleton
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	390	1,620	2,010	280	1,410	1,690	3,700	54%	46%
	2011	480	1,700	2,180	340	1,530	1,870	4,050	54%	46%
	2016	500	1,490	1,990	350	1,720	2,070	4,060	49%	51%
Forecast	2021	510	1,740	2,250	400	1,780	2,180	4,430	51%	49%
	2026	710	1,825	2,535	420	1,830	2,250	4,785	53%	47%
	2031	790	2,145	2,935	450	1,850	2,300	5,235	56%	44%
	2036	870	2,475	3,345	480	1,860	2,340	5,685	59%	41%
	2041	960	2,875	3,835	490	1,860	2,350	6,185	62%	38%
	2046	1,200	2,970	4,170	510	1,900	2,410	6,580	63%	37%
	2051	1,410	3,130	4,540	520	1,940	2,460	7,000	65%	35%
Incremental	2016 - 2021	10	250	260	50	60	110	370	70%	30%
	2016 - 2026	210	335	545	70	110	180	725	75%	25%
	2016 - 2031	290	655	945	100	130	230	1,175	80%	20%
	2016 - 2036	370	985	1,355	130	140	270	1,625	83%	17%
	2016 - 2041	460	1,385	1,845	140	140	280	2,125	87%	13%
	2016 - 2046	700	1,480	2,180	160	180	340	2,520	87%	13%
	2016 - 2051	910	1,640	2,550	170	220	390	2,940	87%	13%



B-1, Table 5
Town of Minto
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	690	1,920	2,610	0	790	790	3,400	77%	23%
	2011	890	1,930	2,820	0	780	780	3,600	78%	22%
	2016	1,150	1,970	3,120	0	910	910	4,030	77%	23%
Forecast	2021	1,160	2,085	3,245	0	920	920	4,165	78%	22%
	2026	1,300	2,220	3,520	0	925	925	4,445	79%	21%
	2031	1,460	2,350	3,810	0	935	935	4,745	80%	20%
	2036	1,640	2,560	4,200	0	945	945	5,145	82%	18%
	2041	1,790	2,775	4,565	0	955	955	5,520	83%	17%
	2046	2,000	3,035	5,035	0	965	965	6,000	84%	16%
	2051	2,210	3,315	5,525	0	975	975	6,500	85%	15%
Incremental	2016 - 2021	10	115	125	0	10	10	135	93%	7%
	2016 - 2026	150	250	400	0	15	15	415	96%	4%
	2016 - 2031	310	380	690	0	25	25	715	97%	3%
	2016 - 2036	490	590	1,080	0	35	35	1,115	97%	3%
	2016 - 2041	640	805	1,445	0	45	45	1,490	97%	3%
	2016 - 2046	850	1,065	1,915	0	55	55	1,970	97%	3%
	2016 - 2051	1,060	1,345	2,405	0	65	65	2,470	97%	3%



B-1, Table 6
Township of Wellington North
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	2,500	2,760	5,260	465	380	845	6,105	86%	14%
	2011	2,000	2,835	4,835	470	655	1,125	5,960	81%	19%
	2016	2,210	3,555	5,765	475	830	1,305	7,070	82%	18%
Forecast	2021	2,320	3,580	5,900	475	890	1,365	7,265	81%	19%
	2026	2,420	3,885	6,305	480	920	1,400	7,705	82%	18%
	2031	2,720	4,185	6,905	490	940	1,430	8,335	83%	17%
	2036	3,020	4,445	7,465	510	960	1,470	8,935	84%	16%
	2041	3,170	4,765	7,935	525	980	1,505	9,440	84%	16%
	2046	3,320	5,155	8,475	525	1,000	1,525	10,000	85%	15%
	2051	3,470	5,460	8,930	550	1,020	1,570	10,500	85%	15%
Incremental	2016 - 2021	110	25	135	0	60	60	195	69%	31%
	2016 - 2026	210	330	540	5	90	95	635	85%	15%
	2016 - 2031	510	630	1,140	15	110	125	1,265	90%	10%
	2016 - 2036	810	890	1,700	35	130	165	1,865	91%	9%
	2016 - 2041	960	1,210	2,170	50	150	200	2,370	92%	8%
	2016 - 2046	1,110	1,600	2,710	50	170	220	2,930	92%	8%
	2016 - 2051	1,260	1,905	3,165	75	190	265	3,430	92%	8%



B-1, Table 7
Township of Puslinch
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	0	0	0	2,130	1,850	3,980	3,980	0%	100%
	2011	0	0	0	1,770	1,630	3,400	3,400	0%	100%
	2016	0	0	0	2,400	3,225	5,625	5,625	0%	100%
Forecast	2021	0	0	0	2,430	3,385	5,815	5,815	0%	100%
	2026	0	0	0	2,650	3,410	6,060	6,060	0%	100%
	2031	0	0	0	2,870	3,435	6,305	6,305	0%	100%
	2036	0	0	0	3,130	3,465	6,595	6,595	0%	100%
	2041	0	0	0	3,510	3,480	6,990	6,990	0%	100%
	2046	0	0	0	3,900	3,505	7,405	7,405	0%	100%
	2051	0	0	0	4,390	3,530	7,920	7,920	0%	100%
Incremental	2016 - 2021	0	0	0	30	160	190	190	0%	100%
	2016 - 2026	0	0	0	250	185	435	435	0%	100%
	2016 - 2031	0	0	0	470	210	680	680	0%	100%
	2016 - 2036	0	0	0	730	240	970	970	0%	100%
	2016 - 2041	0	0	0	1,110	255	1,365	1,365	0%	100%
	2016 - 2046	0	0	0	1,500	280	1,780	1,780	0%	100%
	2016 - 2051	0	0	0	1,990	305	2,295	2,295	0%	100%



B-1, Table 8
County of Wellington
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas ¹			Rural Area ²			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	6,900	15,600	22,500	4,300	7,700	12,000	34,500	65%	35%
	2011	6,800	16,200	23,000	3,600	8,100	11,700	34,700	66%	34%
	2016	7,000	17,600	24,600	4,900	10,500	15,400	39,900	62%	38%
Forecast	2021	7,500	19,600	27,000	5,100	10,900	16,000	43,000	63%	37%
	2026	8,300	21,900	30,100	5,400	11,000	16,400	46,600	65%	35%
	2031	9,500	24,700	34,200	5,700	11,200	16,900	51,100	67%	33%
	2036	10,800	27,700	38,500	6,100	11,300	17,300	55,900	69%	31%
	2041	12,100	31,000	43,200	6,500	11,400	17,900	61,000	71%	29%
	2046	13,400	33,700	47,100	7,100	11,600	18,700	65,800	72%	28%
	2051	14,700	35,800	50,500	7,700	11,700	19,500	70,000	72%	28%
Incremental	2016 - 2021	500	2,000	2,500	300	400	600	3,100	81%	19%
	2016 - 2026	1,300	4,300	5,600	600	500	1,000	6,600	85%	15%
	2016 - 2031	2,500	7,100	9,700	800	700	1,500	11,200	87%	13%
	2016 - 2036	3,800	10,200	14,000	1,200	800	2,000	15,900	88%	12%
	2016 - 2041	5,100	13,500	18,600	1,600	900	2,500	21,100	88%	12%
	2016 - 2046	6,400	16,100	22,600	2,200	1,100	3,300	25,800	88%	12%
	2016 - 2051	7,700	18,300	26,000	2,800	1,200	4,100	30,100	86%	14%

Source: Watson & Associates Economists Ltd.

Notes: Figures have been rounded and may not up precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

"Other Rural" includes employment within a rural area outside a Rural Employment Area and include agriculture, commercial/institutional and mixed industrial/agriculture employment.

¹Urban Settlement Areas include: Erin Village, Hillsburgh, Fergus, Elora-Salem, Mount Forest, Arthur, Rockwood, Drayton, Moorefield, Harriston, Palmerston, Clifford.

²All employment outside of urban settlement areas.



B-2, Table 1
County of Wellington
Employment Forecast, 2016 to 2051

Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	10,500	3,000	5,700	4,100	4,000	7,100	5,600	40,000
2021	12,200	3,100	6,000	4,400	4,200	7,300	5,800	43,000
2026	14,000	3,500	6,100	4,800	4,400	7,700	6,100	46,600
2031	16,200	4,100	6,200	5,200	4,700	8,300	6,300	51,000
2036	18,500	4,800	6,300	5,700	5,100	8,900	6,600	55,900
2041	21,300	5,300	6,300	6,200	5,500	9,400	7,000	61,000
2046	23,300	5,900	6,600	6,600	6,000	10,000	7,400	65,800
2051	25,100	6,200	6,800	7,000	6,500	10,500	7,900	70,000
Share of 2016 County Employment	26%	8%	14%	10%	10%	18%	14%	100%
Share of 2051 County Employment	36%	9%	10%	10%	9%	15%	11%	100%
Employment Growth								
2016 - 2051	14,600	3,200	1,100	2,900	2,500	3,400	2,300	30,000
Annual Growth Rate, 2016 - 2051	2.5%	2.1%	0.5%	1.5%	1.4%	1.1%	1.0%	1.6%
Share of County Employment Growth, 2016-2051	49%	11%	4%	10%	8%	11%	8%	100%

Note: Figure has been rounded by Area Municipality.
Source: Watson & Associates Economists Ltd., 2021.



Phase 1 MCR Report: Urban Structure and Growth Allocations

County of Wellington

Final Report (as amended January 31, 2022)

June 16, 2021

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List of Acronyms and Abbreviations

A.P.T.G.	A Place to Grow
B.U.A.	Built-up Area
D.G.A.	Designated Greenfield Area
E.L.E.	Employment Lands Employment
G.G.H.	Greater Golden Horseshoe
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.N.A.	Land Needs Assessment
M.M.A.H.	Ministry of Municipal Affairs and Housing
M.C.R.	Municipal Comprehensive Review
N.A.I.C.S.	North American Industry Classification System
N.F.P.O.W.	No Fixed Place of Work
O.M.F.	Ontario Ministry of Finance
O.P.	Official Plan
P.P.S.	Provincial Policy Statement
P.P.U.	Persons Per Unit
P.R.E.	Population-Related Employment



List of Acronyms and Abbreviations (Cont'd)

U.G.C.	Urban Growth Centre
W.A.H.	Work at Home Employment



Executive Summary



Executive Summary

The County of Wellington has a history of proactively planning for growth. In 2017, the County completed major updates to its Official Plan (O.P.) to conform with the June 2013 consolidation of the provincial Growth Plan for the Greater Golden Horseshoe (G.G.H.), 2006. A key major update included Official Plan Amendment (O.P.A.) 99. O.P.A. 99 amended the County of Wellington's growth forecast by updating the population, household and employment forecast, including extending the forecast to 2036 and 2041.

As part of the Municipal Comprehensive Review (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). The Growth Plan, 2019 requires municipalities to update their respective O.P. to a 2051 horizon, including a review and evaluation of the minimum greenfield density and intensification targets and forecasts contained in the Growth Plan.

The O.P. is a long-range document that is designed to manage planned change and the physical development of the County over the 2041 planning horizon. Wellington County is currently preparing a to revise its O.P. to describe the type of growth the community wants and where that growth should occur. 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.

Wellington County is currently undertaking the growth management technical requirements of its M.C.R. to provide strategic policy recommendations which support the development of updated policies to the County's O.P. The M.C.R. technical reporting has been organized into two reports:

- Phase 1 Report – Growth Forecasts and Growth Allocations; and
- Phase 2 Report – Land Needs Assessment and Policy Recommendations.



Key components of this Phase 1 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 Area Municipality and Urban Centre; and
- Conclusions and recommendations related to the County's proposed urban structure, County-wide growth forecasts and growth allocations by Area Municipality.

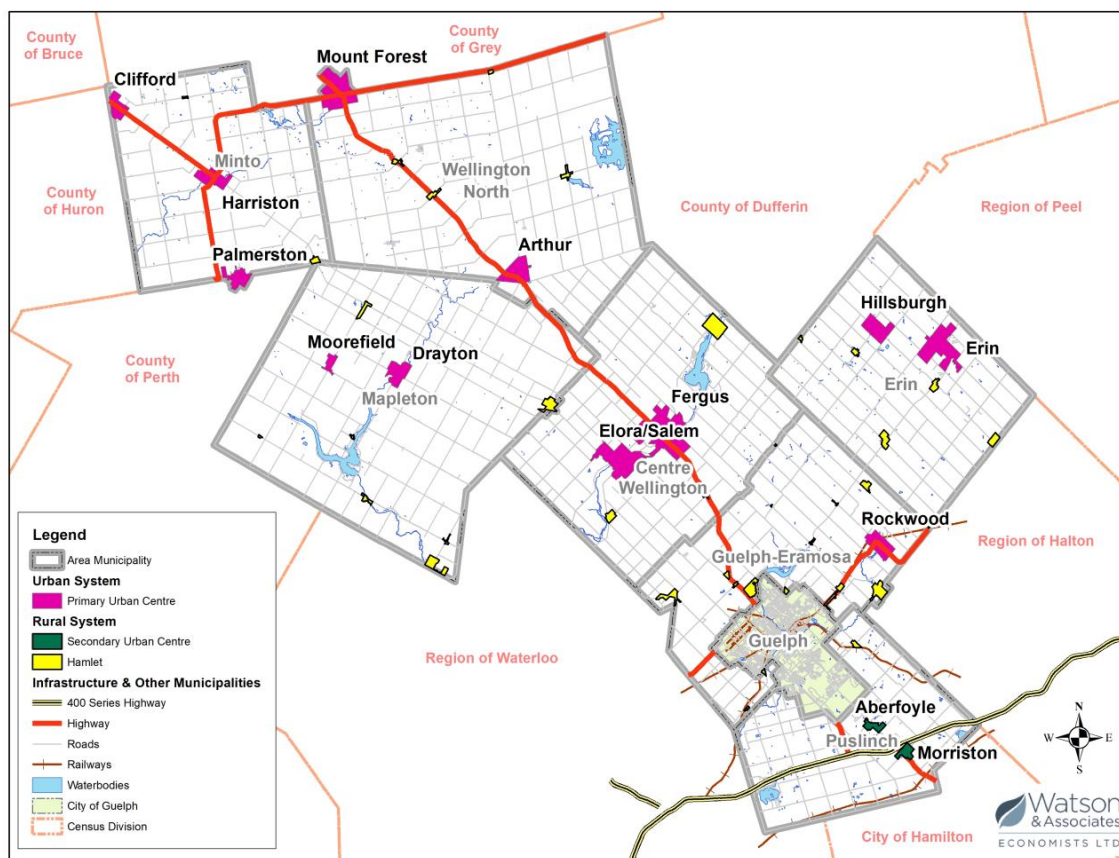
Wellington Rural and Urban Systems

Wellington County 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. The Urban System includes urban settlement areas (referred to as Urban Centres in the County of Wellington O.P.) that are to accommodate the majority 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 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.

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 within municipally serviced (water/wastewater) settlements. It is recommended that the County consider classifying hamlets within the Rural System. The County's Urban Centres with no municipal services (water/wastewater) are also recommended to be classified within the Rural System as Secondary Urban Centres. As such, the County's Urban Centres with full municipal services are recommended to be classified as Primary Urban Centres. Figure ES-1 provides an illustration of the proposed Urban System structure.



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



Wellington County Population Growth Outlook to 2051

It is important to recognize that future population and employment growth within the County of Wellington 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 Wellington. 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-1, due to its geographic location within the western region of the G.G.H. Outer Ring, Wellington County 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 Wellington, 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 Wellington 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 Wellington 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. Outer Ring, particularly those that are located within the Toronto-Waterloo Innovation Corridor.¹ Raising the economic profile of the County of Wellington by leveraging the economic opportunities and strengths of the broader G.G.H. regional

¹ The Toronto-Waterloo Innovation Corridor, which includes the City of Guelph and Waterloo Region, has strong economic and employment growth potential based on its established presence as the largest technology cluster in Canada, critical mass of post-secondary institutions and incubators, access to skilled labour, and high quality of life. The Toronto-Waterloo Innovation Corridor is the second largest and second fastest growing market in North America related to technology talent, including over 200,000 tech workers and 15,000+ tech companies. The Toronto-Waterloo Innovation Corridor provides a key opportunity for Wellington County to leverage its growing local economy in the technology sector.



economy is recommended as a key long-term economic development strategy for the County.

ES-2 County of Wellington within the Context of the G.G.H.

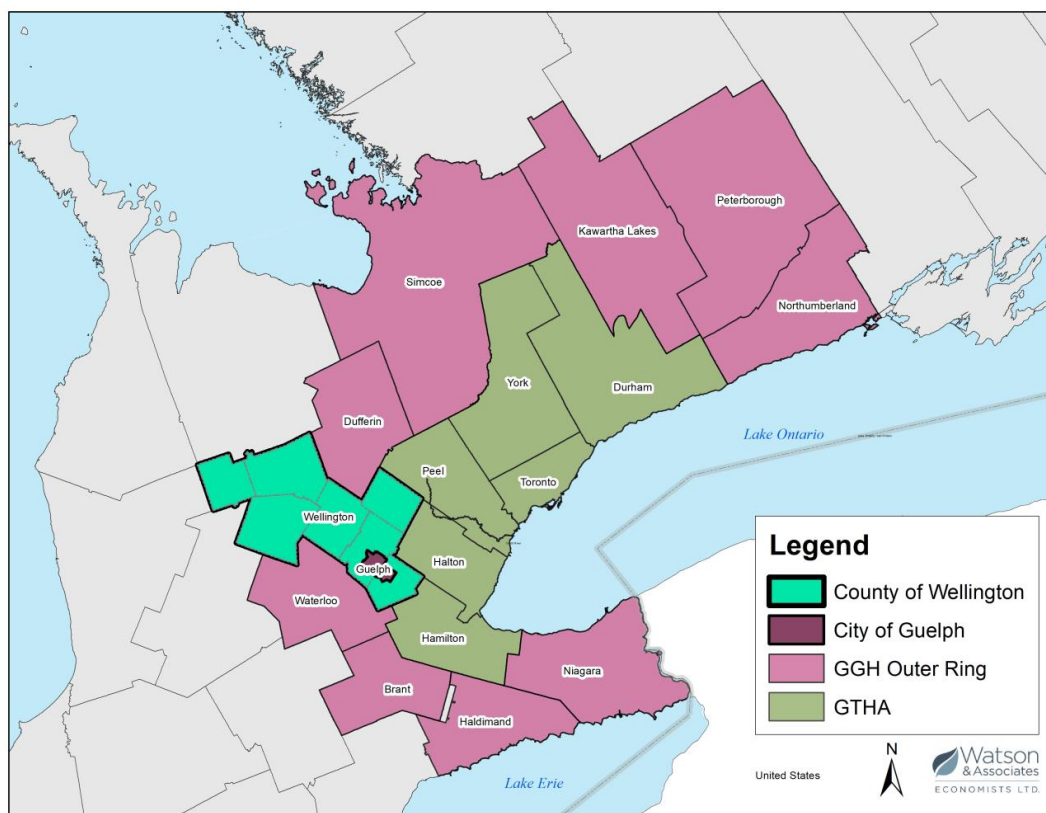


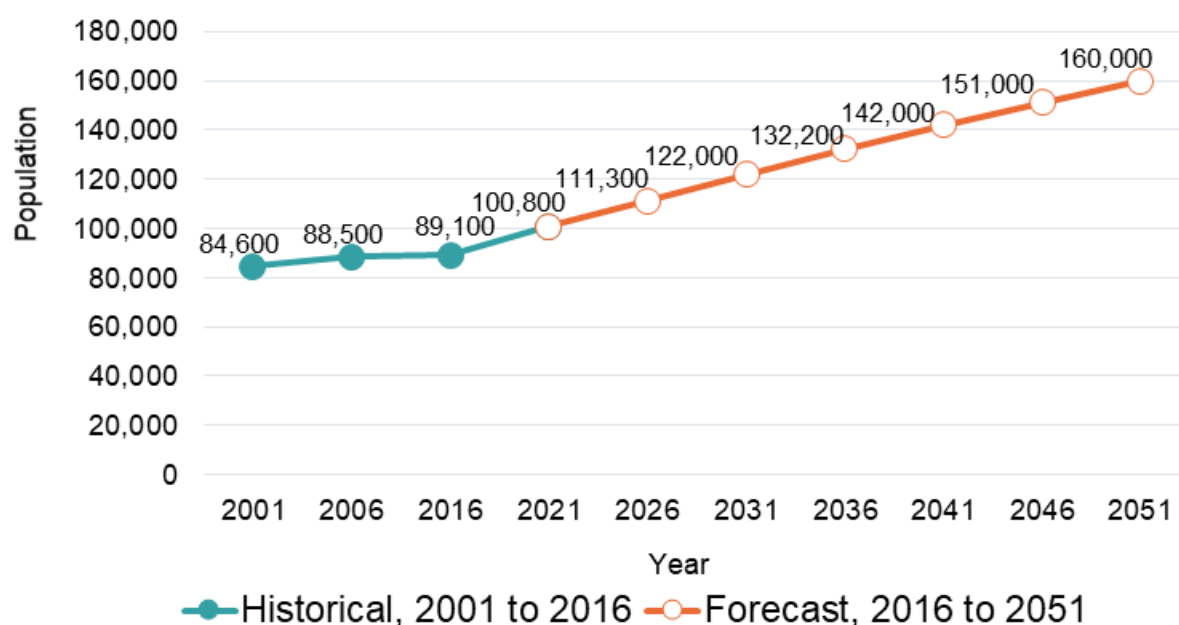
Figure ES-3 summarizes the County of Wellington's total population growth forecast over the 2016 to 2051 forecast period relative to historical population between 2001 and 2016. By 2051, the County's total population base is forecast to grow to approximately 160,000. This represents an increase of approximately 66,400 persons between 2016 and 2051, or an average annual population growth rate of 1.5% 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 Wellington. The Schedule 3 Growth Plan, 2019 forecast for Wellington 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 increase in the share of total population and employment in the County of Wellington relative to the G.G.H. Outer Ring as a whole.

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



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

To accommodate the long-term population forecast, the County will require an additional 22,000 new households to be constructed over the 2021 to 2051 planning horizon, or just over 700 new households annually. 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 Wellington 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 County's attractiveness to older population segments.

Wellington County Population Growth Allocations, 2021 to 2051

Over the forecast horizon, it is anticipated that the County will become increasingly more urban. As of 2016, approximately 51% of the County's population is within the Urban System, while 49% of the County's population is within the Rural System. Looking forward, it is anticipated that by 2051, approximately 66% of the County's population base will be concentrated within the Urban System, which includes 12 Primary Urban Centres. It is anticipated that the Urban System within the County will accommodate an additional 58,300 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 47,600). Phase 2 of the M.C.R. which is related to growth management and urban lands will explore requirements to accommodate future urban growth within the existing settlement boundaries of the Urban Centres.

As previously discussed, net migration, largely from the large urban centres within the western and northern G.T.H.A. municipalities and the western G.G.H. Outer Ring is anticipated to be the major driver of population growth for the County. Urban Centres with good access to the larger G.G.H. employment markets, such as Fergus, Elora and Erin Village, are anticipated to accommodate a large portion of the County's population growth. It is anticipated that these Urban Centres will also play a role in broadening the housing options available within the County with respect to housing structure type. Other Urban Centres are anticipated to accommodate more moderate levels of future population growth as these Urban Centres are also important community hubs for the County. All Urban Centres that do not have identified municipal servicing constraints



are anticipated to continue to accommodate urban development at higher levels than historically experienced in recent decades.

At the Area Municipal level, the Township of Centre Wellington and the Town of Erin, located in the southern portion of the County, are anticipated to accommodate a large portion of the County's population growth over the long-term planning horizon. The Township of Centre Wellington is anticipated to accommodate just under half the County's population growth (45%), while the Town of Erin is anticipated to accommodate just under a quarter of the County's population growth (22%).

With limited or no opportunities to accommodate residential growth in areas with full municipal services (water and wastewater), the Township of Guelph-Eramosa and the Township of Puslinch are anticipated to accommodate a lower share of population and housing growth relative to historical trends. Further, it is anticipated that Guelph-Eramosa and Puslinch will accommodate a large share of the County's rural population and housing growth.

The municipalities in the northern portion of the County, including Mapleton, Minto and Wellington North, are anticipated to accommodate 23% of the County's population growth. While potential urban land supply is currently designated to accommodate additional urban development within some of these northern municipalities, there are perceived limits from a real estate market perspective regarding the level of sustained urban development that these municipalities can accommodate over the long term.

Wellington County Employment Growth Outlook and Allocations to 2051

The County faces a number of opportunities and challenges with respect to employment growth in light of the evolving structural changes in the economy and disruptive factors which continue to influence the nature of the economy. One of these challenges relates to macro-economic trends over which the County has limited control. This includes the relative strength of the global economy, international trade policy and the competitiveness of the Canadian economic base relative to other established and emerging global markets.

In contrast to the above, the County of Wellington has considerable control and ability to position itself in a positive manner when considering the County's regional competitive ranking. This requires the County to continue marketing itself as a hub for innovation, equipped with the human capital that is required to encourage on-going innovation,



entrepreneurship, small business development and local investment retention. A major factor for the future competitiveness of the County's economic base relates to the structure, quality and "readiness" of its Employment Areas.

Over the next several decades the County's employment base is anticipated to steadily grow across a broad range of export-based and population serving employment sectors. The County, however, will be competing to attract and retain these sectors with other municipalities across the G.G.H. and beyond. The County of Wellington has a diverse and growing economic base with a strong employment base in both the Rural System and the Urban System. Over the long term, the County is expected to accommodate balanced growth between residential and non-residential development and provide increasing local job opportunities for the residents of Wellington. By 2051, the County's employment base is forecast to reach approximately 70,000, in accordance with Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 30,100 jobs from 2016, or an annual employment growth rate of 1.7%.

Over the 2020 to 2051 period, employment within Urban Employment Areas is anticipated to account for 32% of total employment and accommodate a diverse range of industrial sectors, and new and expanding businesses. Urban Community Areas are anticipated to account for the largest share of the County's employment growth at 53% driven largely by work at home employment, commercial services, tourism services and institutional uses.

The County's Rural System is anticipated to remain a large component of the County's employment base. It is anticipated that growth within the Rural System will be supported by an expanding agriculture base, opportunities for on-farm diversification, recreation activities and small-scale rural employment lands employment (E.L.E.) uses.

Achieving the County-wide employment forecast and allocations by Area Municipality will also require significant investment and effort on behalf of both the public and private sectors to attract and accommodate new employers and facilitate the expansion of existing businesses across a broad range of established and emerging employment sectors.

Conclusions

Over the forecast horizon, it is anticipated that all Area Municipalities within Wellington County will continue to experience strong population, housing and employment growth.



As discussed in Chapter 3, it is anticipated that the outward growth trends from the G.T.H.A. to the G.T.A. Outer Ring will continue to place urban development pressures on Wellington County.

By 2051, the County of Wellington total population base is forecast to grow to approximately 160,000 persons as per Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 66,400 residents between 2016 and 2051, or an average annual population growth rate of 1.5% during this time period. Accommodating forecast total population growth in the County of Wellington will require approximately 24,710 new households, or just over 710 new Census households annually from 2016 to 2051 (or 730 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 Wellington. As such, a higher long-term population forecast for the County of Wellington is not supported for the purposes of long-term growth management and urban land needs analysis.

The Urban Centres within the Township of Centre Wellington and the Town of Erin, are anticipated to accommodate a large portion of the County's population and employment growth over the long-term planning horizon, due to their proximity to the large employment markets of the G.G.H. These Urban Centres will play a role in broadening the housing options available within the County with respect to housing structure type. The remaining Area Municipalities are anticipated to add to their population and employment base at a rate generally higher than historical levels, where municipal water/wastewater servicing constraints have not been identified.

Over the forecast horizon, it is anticipated that the County will become increasingly more urban. As of 2016, approximately 51% of the County's population is within the Urban System, while 49% of the County's population is within the Rural System. Looking forward, it is anticipated that by 2051 approximately 66% of the County's population base will be concentrated within the Urban System which includes 12 Primary Urban Centres.¹ Similar to the population base, employment growth is also anticipated to become increasingly more urban. This is anticipated to place increasing

¹ Housing within the Urban System represents 54% of the County's housing and is anticipated to increase to 69% by 2051.



demands on the County for infrastructure and municipal services which are able to support a larger, more diverse urban population base.

Recommendations

The following Phase 1 M.C.R. recommendations are provided regarding the County's proposed urban structure, and its population, household and employment forecast to 2051.

Urban and Rural System

- The County should provide a distinction between the Urban System and the Rural System based on servicing (water and wastewater) and where the majority of the growth is to be allocated in accordance with the Growth Plan, 2019 policies. It is recommended that the Urban System be defined based on full servicing, while the remaining be classified as the Rural System.
- Urban Centres without full servicing, which includes Aberfoyle and Morriston, are recommended to be referred to as Secondary Urban Centres within the Rural System and identified as priority settlement areas within the Rural System given the importance of these settlement areas as community hubs.
- All Urban Centres (12 in total) with full municipal servicing are recommended to be referred to as Primary Urban Centres.
- The County should consider modifying the Employment Area definition in the County's O.P. to include only areas identified in the O.P. as Industrial and Rural Employment Areas (i.e., exclude Highway Commercial), lands identified in provincially policies for protection to non-employment uses.

County-Wide Forecast

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



Growth Allocations to 2051

- It is recommended that the County adopt the growth allocations by Area Municipality to 2051. Area municipalities may elect to make further refinements to the rate of population and employment growth within the 2021 to 2051 planning horizon.
- It is further recommended that the County and Area Municipalities, which have an identified Urban System, plan for a steady shift in their population and employment base towards urban development.

While growth allocations have been provided by Urban Centre, these forecasts are provided for guidance and for planning purposes at the local municipal level. Area Municipalities may elect to make further refinements within their Urban System to reflect changes in local conditions, servicing and timing of development.

Next Steps

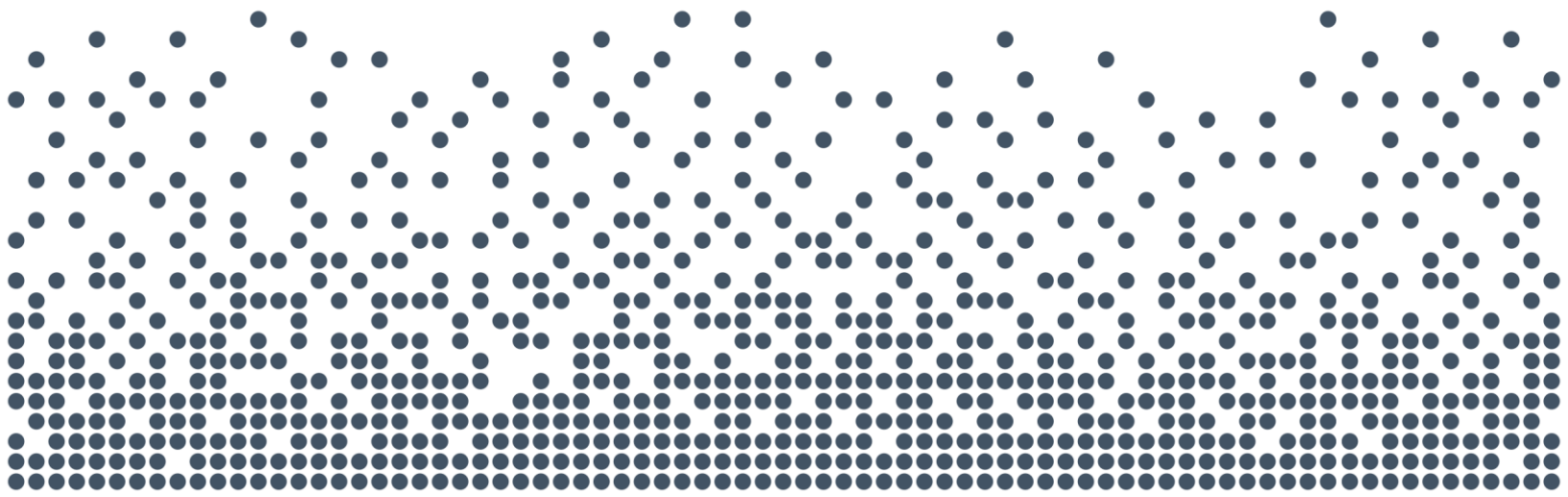
This report will form an important component in supporting the analysis in the Phase 2 Report which is scheduled for completion by Fall 2021. The Phase 2 Report - Land Needs Assessment & Policy Considerations will include the technical growth management requirements of the M.C.R. The Phase 2 Report will conclude the urban land requirements for the County's Urban System (Designated Greenfield Area (D.G.A.) Community Area and Urban Employment), as well as provide further recommendations in accommodating growth in the Urban and Rural System.

Key components of this Phase 2 report will include:

- A review of intensification opportunities and challenges in meeting the County's existing target of 20% of annual housing growth within the built-up area and a recommendation on the County's intensification target;
- An assessment of the D.G.A. density target of 40 people and jobs/gross ha and a recommendation on the County's target;
- An Employment Area density target for the O.P.;
- Land requirements for the D.G.A. Community Area and Employment Areas within the Urban System; and
- Planning policy considerations with respect to planning for growth and growth management.



Refer to January 31, 2022 Addendum Report for revisions to this Report.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

The County of Wellington retained Watson & Associates Economists Ltd. (Watson) in late 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 two reports:

- Phase 1 Report – Growth Forecasts and Growth Allocations; and
- Phase 2 Report – Land Needs Assessment & Policy Considerations.

Key components of this Phase 1 report include:

- A review of the Urban and Rural System, including settlement hierarchy;
- Long-term population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by Area Municipality and Urban Centre; and
- Phase 1 Conclusions and recommendations.

Refer to January 31, 2022 Addendum Report for revisions to this Report.

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. Typically, 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 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 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:
 - Growth management;
 - Agricultural and rural areas;
 - Climate change;
 - Complete and healthy communities;
 - Consultation and coordination;
 - Housing;
 - Mineral aggregates;
 - Natural heritage and flooding;
 - Transportation; and
 - Water resources.

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 County Council. By completing the M.C.R., County staff will align the O.P. policies with the new Growth Plan, 2019.



1.3 Provincial Policy Context

1.3.1 *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 PPS, 2020 came into effect on May 1, 2020.¹ Its purpose was to update the PPS, 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 PPS, 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.”

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

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



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 which 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).

1.3.2 A Place to Grow: 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 services 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 Wellington 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. have the ability to apply for alternative intensification targets.

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



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 Wellington 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 have the ability to 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 is allowed outside of an M.C.R., provided that
 - there is a need;
 - maintain a significant number of jobs on those lands through the establishment of development criteria;
 - there are no adverse effects on the viability of an Employment Area or achievement of minimum intensification targets; and

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

² Ibid., 2.2.7.

³ Ibid., section 2.2.4.

⁴ Ibid., section 2.2.5.



- 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 that 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 G.G.H., 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 LNA 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 has 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 MCR process.³ If an alternative growth forecast that exceeds Schedule 3 of the Growth Plan, 2019 is utilized, the MCR must demonstrate that the alternate growth scenario meets the Growth Plan, 2019 policy objectives of accommodating a range of housing choices

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

² Ibid., section 2.2.8.

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



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.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

1.3.3 Land Needs Assessment Methodology for the Greater Golden Horseshoe

On June 16, 2020, the Minister released the proposed LNA in the G.G.H. for consultation. The Minister formally issued the final methodology on August 28, 2020 in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.³ 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* that 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*.”

¹ A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Land Needs Assessment Methodology for the Greater Golden Horseshoe, p. 5.

² Growth Plan, 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.



- **“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 located in both *delineated built-up areas* and *designated greenfield areas*.”¹

1.4 County of Wellington Official Plan

The County of Wellington O.P. (adopted May 6, 1999, Office Consolidation revision January 8, 2021) is being reviewed as part of this M.C.R. process as it relates to growth management, growth forecasts, housing, and employment directions. In 2017, the County completed major updates to the O.P. to conform with the June 2013 consolidation of the provincial Growth Plan for the G.G.H., 2006. A key major update included Official Plan Amendment (O.P.A.) 99. O.P.A. 99 amended the County of Wellington’s growth forecast by updating the population, household and employment forecast, including extending the forecast to 2036 and 2041. Other updated policies as part of O.P.A. 99 included policies for second units, to comply with changes to the *Planning Act*.

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 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.

In the County of Wellington’s O.P., Urban Centres are identified as the preferred growth areas with a full range of land-use opportunities. Residential uses of various types and densities, commercial, industrial, and institutional uses, as well as parks and open space uses, will be permitted where compatible and where services are available.² Other settlement areas include hamlets. Hamlets are identified as small settlement areas that are limited to small-scale development given the rural context and level of

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

² County of Wellington Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 7.5, p. 73.



service available in hamlets. Further, it is noted in the O.P. that hamlets will typically accommodate low-density development with individual on-site services.¹

The County O.P. defines two major housing density types: low density (single-detached, semi-detached and duplex) and medium density (townhouse, rows and apartments with a maximum density of 75 units per ha).² The County's O.P. generally does not permit high-density housing forms with a density greater than 75 units per ha.

With respect to directing employment growth, the County has four distinct major designations to accommodate growth. Non-residential designations include Highway Commercial; Industrial; Rural Employment; and Central Business District. Employment Areas are defined as areas designated as Highway Commercial, Industrial and Rural Employment.³ Conversions of these uses to other uses not permitted are an Employment Area conversion. The Highway Commercial designation accommodates the majority of commercial services based outside the Central Business District. The purpose of the Highway Commercial designation is to accommodate larger retail uses that require large sites for parking and access to major roads. The Industrial designation is concentrated in the Urban Centre and has municipal servicing. The Industrial designation primarily accommodates industrial-type development and export-based activities. The Rural Employment designation accommodates industrial-type development outside Urban Centres and with on-site private servicing. Finally, the Central Business District is considered an important civic centre of the community and is intended to accommodate the most intensive development within the Urban Centre.⁴

Key growth management targets of the County's O.P. include the following:

- Strive to attain at least 16 units per gross hectare (6.5 units per gross acre) in newly developing subdivisions;⁵
- Require new developments to achieve densities which promote the overall greenfield density target of 40 persons and jobs per hectare;⁶

¹ County of Wellington Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 7.5, p. 73.

² Ibid., Policy 8.3.4 and Policy 8.3.5, p. 79 and p. 80.

³ Ibid., Policy 4.2.2., p. 22.

⁴ Ibid., Policy 8.4.4., p. 84.

⁵ Ibid., Policy 4.4.4., p. 25.

⁶ County of Wellington Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 4.4.4., p. 25.



- Target a minimum of 25% of new housing units in the County to be affordable (affordable is 10% below the average price in the market area);¹ and
- Ensure that by the year 2015 and for each year thereafter, a minimum of 20 percent of all residential development occurring annually will be within the B.U.A.²

By 2041, the County is anticipated to increase its share of the Urban System population from 51% in 2016 to 62% by 2041. The County's O.P. does not contain policies on targeting Employment Area density. As part of the M.C.R. Phase 2 Report, a density target for Urban Employment Areas will be identified that reflects the location conditions and anticipated outlook within the County.

¹ Ibid.

² Ibid.



Chapter 2

Urban and Rural System



2. County of Wellington Urban and Rural System

The County of Wellington includes a blend of urban and rural communities. This chapter provides 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. In addition, this chapter provides policy recommendations in aligning the County's O.P. urban and rural system structural components with the Growth Plan, 2019.

2.1 Introduction

2.1.1 Background

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 Wellington 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.

2.2 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.



2.2.1 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

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 It is further noted that all settlement areas that are identified as hamlets in the Greenbelt Plan 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.³ According to the Growth Plan, 2019, a limited amount of growth is allocated to rural settlement areas.⁴

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**,⁵ 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.⁶

Prime agriculture lands 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).⁷

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

² Ibid.

³ Ibid.

⁴ Ibid., p. 13.

⁵ Ibid., Policy 2.2.9., p. 27 and Definitions, p. 81.

⁶ Ibid., Policy 2.2.9., p. 27.

⁷ Ibid., Definitions, p. 79.



2.2.2 Structural Components of the Rural System

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

- **Rural settlement areas** – are 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.¹
- **Prime agriculture lands – lands** identified by the Ontario Ministry of Agriculture, Food and Rural Affairs (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** – are 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.

2.2.3 Rural System – County of Wellington O.P.

The existing County of Wellington O.P. defines the Rural System as “primarily natural resource land and some other uses typically found in non-urban areas.”³

The Rural System includes:

- Prime agricultural areas;
- Secondary agricultural areas;
- Mineral aggregate areas;

¹ A Place to Grow, Growth Plan for the Greater Golden Horseshoe Region, 2019, Definitions, Policy 2.2.9, p. 27.

² Ibid., p. 78.

³ Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 6.1, p. 61.



- Seasonal and recreational use areas;
- Rural housing;
- Rural Employment Areas;
- Waste management sites; and
- Special use areas.¹

The County's 37 hamlets and two Urban Centres with no municipal services (Aberfoyle and Morriston) are classified in the County of Wellington O.P. as part of the Urban System. The current policies of the Rural System in the County O.P. represent narrower rural uses compared to policies in the provincial Growth Plan, 2019.

2.2.4 Proposed Changes to the County's Rural System O.P. Policies

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 be allocated to the areas with servicing (water/wastewater), i.e. Urban Centres. Growth within the Rural System is to be compatible with the rural setting and provide opportunities to support the rural base.

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 Aberfoyle and Morriston meet the definition of rural settlement area according to the Growth Plan, 2019, the County should consider maintaining the status of these settlement areas as an Urban Centre. While opportunities to accommodate growth within Aberfoyle and Morriston are limited over the planning horizon, these settlement areas function as important community hubs in supporting the economic and social function of the Township of Puslinch. It is proposed that the County of Wellington classify Aberfoyle and Morriston as Secondary Urban Centres, within the Rural System. As a Secondary Urban Centre, these rural settlement areas will be considered a priority in maintaining their function as community hubs.

¹ Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 6.1, p. 61.



2.2.5 Proposed Rural System Components

The following are proposed Rural System components:

- Secondary Urban Centres (Aberfoyle and Morriston);
- Hamlets;
- Rural housing;
- Rural Employment Areas; and
- Other rural lands:
 - Prime agricultural areas;
 - Secondary agricultural areas;
 - Mineral aggregate areas;
 - Seasonal and recreational use areas;
 - Waste management sites; and
 - Special use areas.

As discussed later in this report, the majority of the County's growth over the 2016 to 2051 period is allocated to the Urban System. Approximately 12% of the County's population growth is allocated to the Rural System, which assumes small-scale development within the County's hamlets and the two Secondary Urban Centres, in addition to some growth through rural lot development (i.e. severances and development of vacant rural lots). With respect to employment growth, approximately 15% of the employment growth is allocated to the Rural System and assumes a large portion within Rural Employment Areas. Figures 2-1a and 2-1b provide maps of the proposed updates to the County's Rural System.



Figure 2-1a
County of Wellington
Proposed Rural System – Secondary Urban Centres and Hamlets

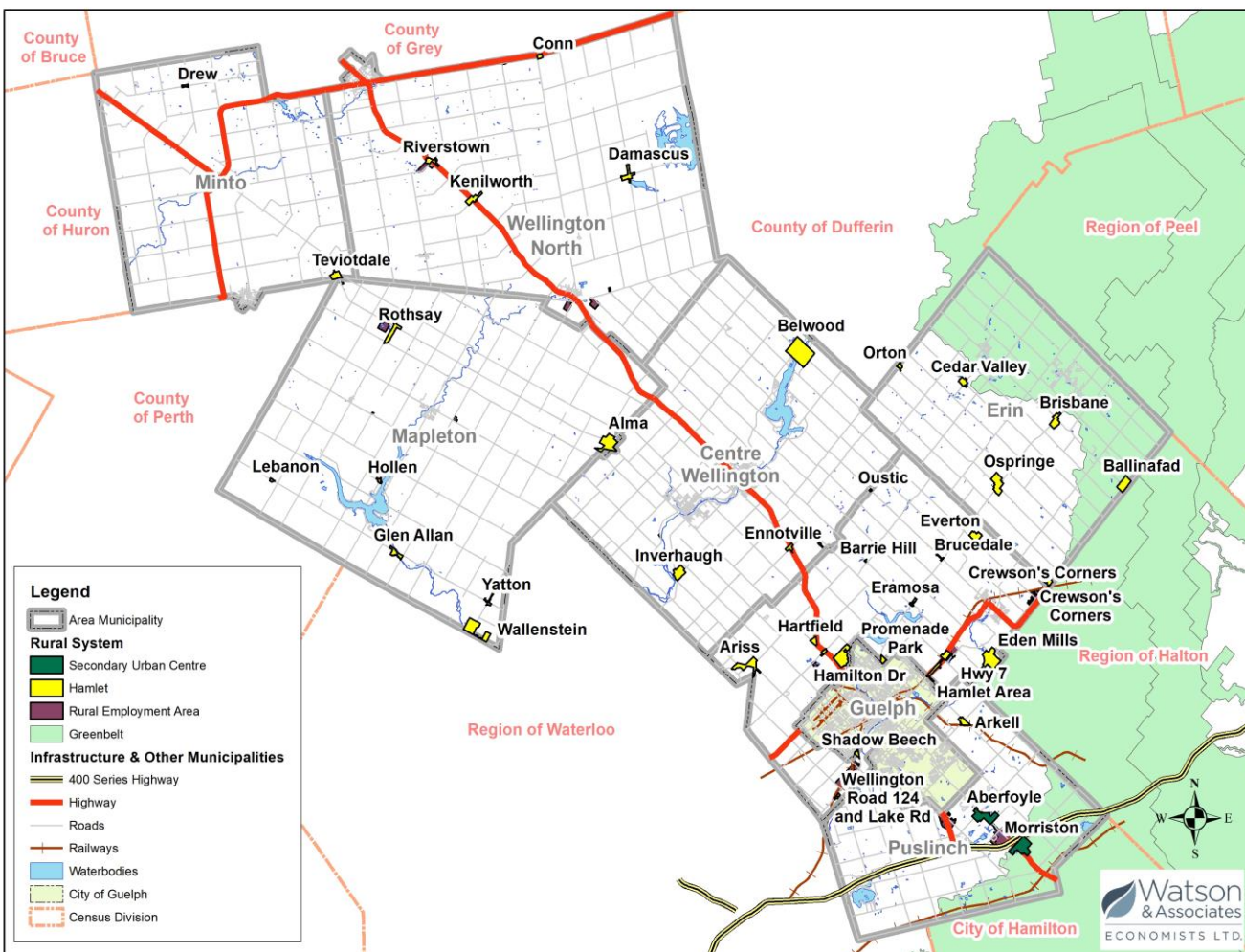
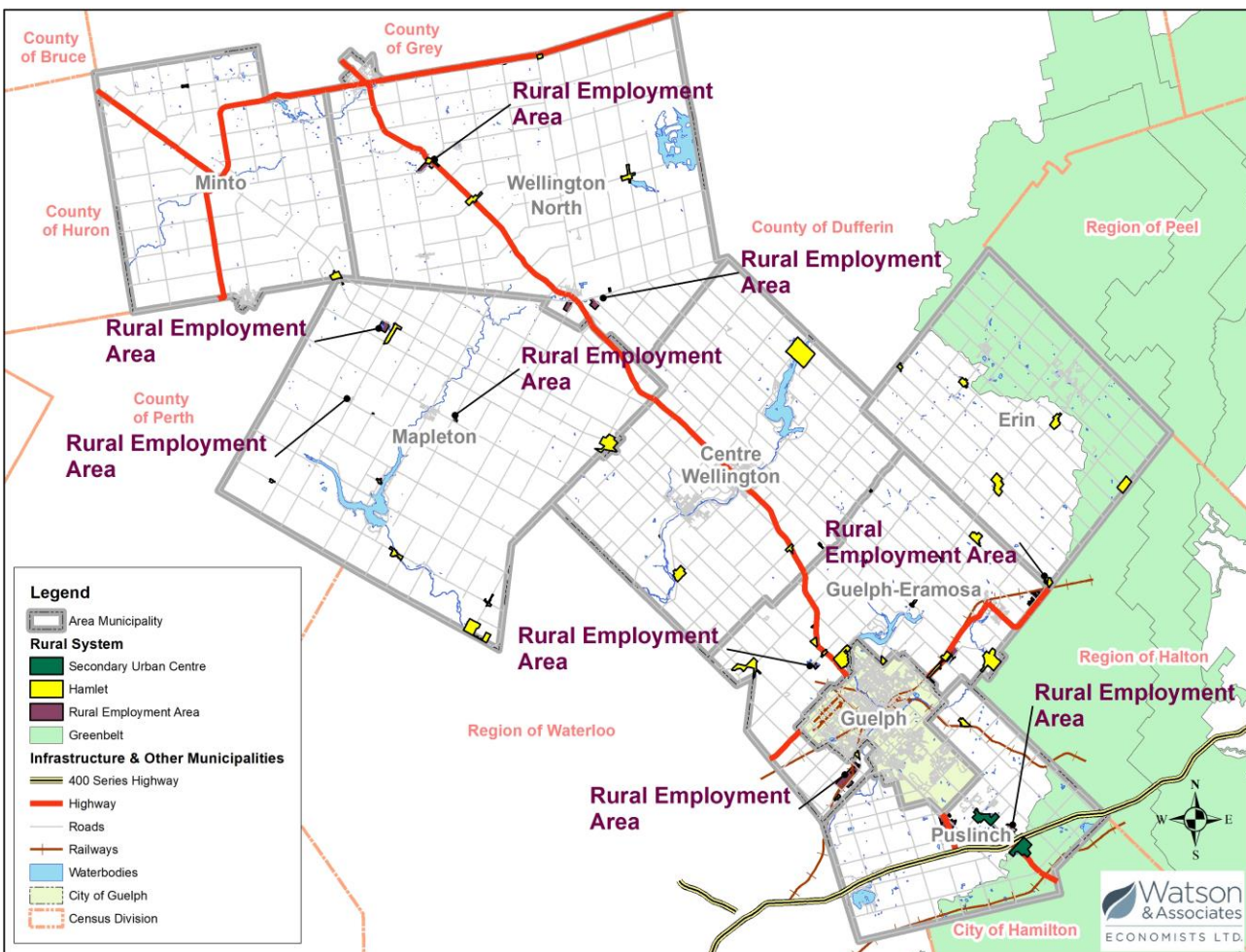




Figure 2-1b
County of Wellington
Proposed Rural System – Rural Employment Areas





2.3 Urban System

The Urban System includes urban settlement areas (referred to as Urban Centres in the County of Wellington O.P.) that are to accommodate the majority 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 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 Wellington is required to also establish a hierarchy within the Urban System and within settlement areas.¹

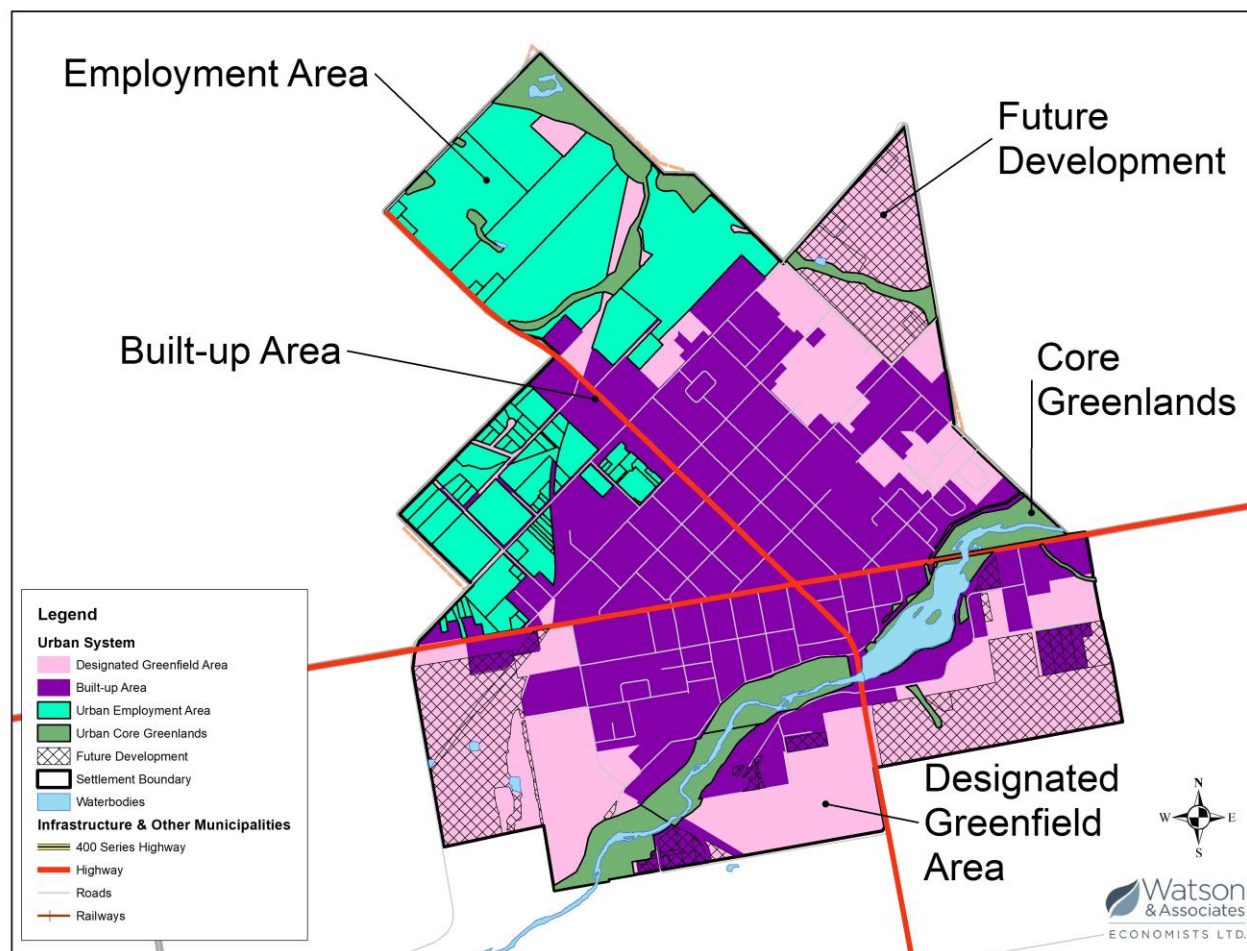
Within the Urban System, growth is to be prioritized within the B.U.A. The B.U.A. includes an area within a settlement that is municipally serviced (water and wastewater) and was delineated by the Province to represent the approximate area developed as of 2006. The County of Wellington has 12 Urban Centres with a delineated B.U.A. The portion of the urban settlement area (or Urban Centre) outside the B.U.A. is referred to as the D.G.A. Figure 2-2 illustrates the B.U.A. and D.G.A. of the Urban Centre of Mount Forest as an example.

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) identified in the Growth Plan, 2019. Based on a review of the B.U.A.s of the 12 Urban Centres, 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 County consider the entire B.U.A. as an S.G.A. for intensification.

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



Figure 2-2
Mount Forest Urban Centre
D.G.A. and B.U.A.



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 of Urban Employment Areas are referred to as Community Areas.

Urban Centres include settlement areas with full municipal servicing.



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 in 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

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 (Urban Centre) that exclude Employment Areas. Community Areas accommodate residential and non-residential uses that support the local residents.

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.)** – are priority areas to accommodate urban growth.
- **Designated Greenfield Area (D.G.A.)** – are developing areas to accommodate the remaining urban growth not accommodated in the B.U.A.
- **Employment Areas** – are areas that are protected from sensitive uses and accommodate export-based or industrial employment.
- **Community Areas** – are areas that accommodate residential and employment outside Employment Areas, including major retail.
- **Major Retail** – are 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.

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



2.3.4 Urban System – County of Wellington O.P.

The existing County of Wellington O.P. defines the Urban System as “the larger urban places in Wellington, which are expected to accommodate the majority of growth over the planning period.”¹ As previously discussed, the County’s O.P. further notes that Urban Centres and hamlets are included in the Urban System.

Employment Areas are key structural components of the Urban System. According to the County O.P., Employment Areas are areas designated in the O.P. as Industrial, Highway Commercial and Rural Employment. The definition of Employment Areas is provided within the Employment Area conversion policy of the O.P.² The County of Wellington O.P. definition of Employment Areas includes a broader definition than the Growth Plan, 2019, by including Highway Commercial designation sites. Based on a review of the commercial structure within the County, the Highway Commercial designation accommodates the majority of major retail uses within the Urban Centres of the County of Wellington. Figure 2-3 illustrates the land-use designations and the location of large retail uses, using the Mount Forest Urban Centre as an example.

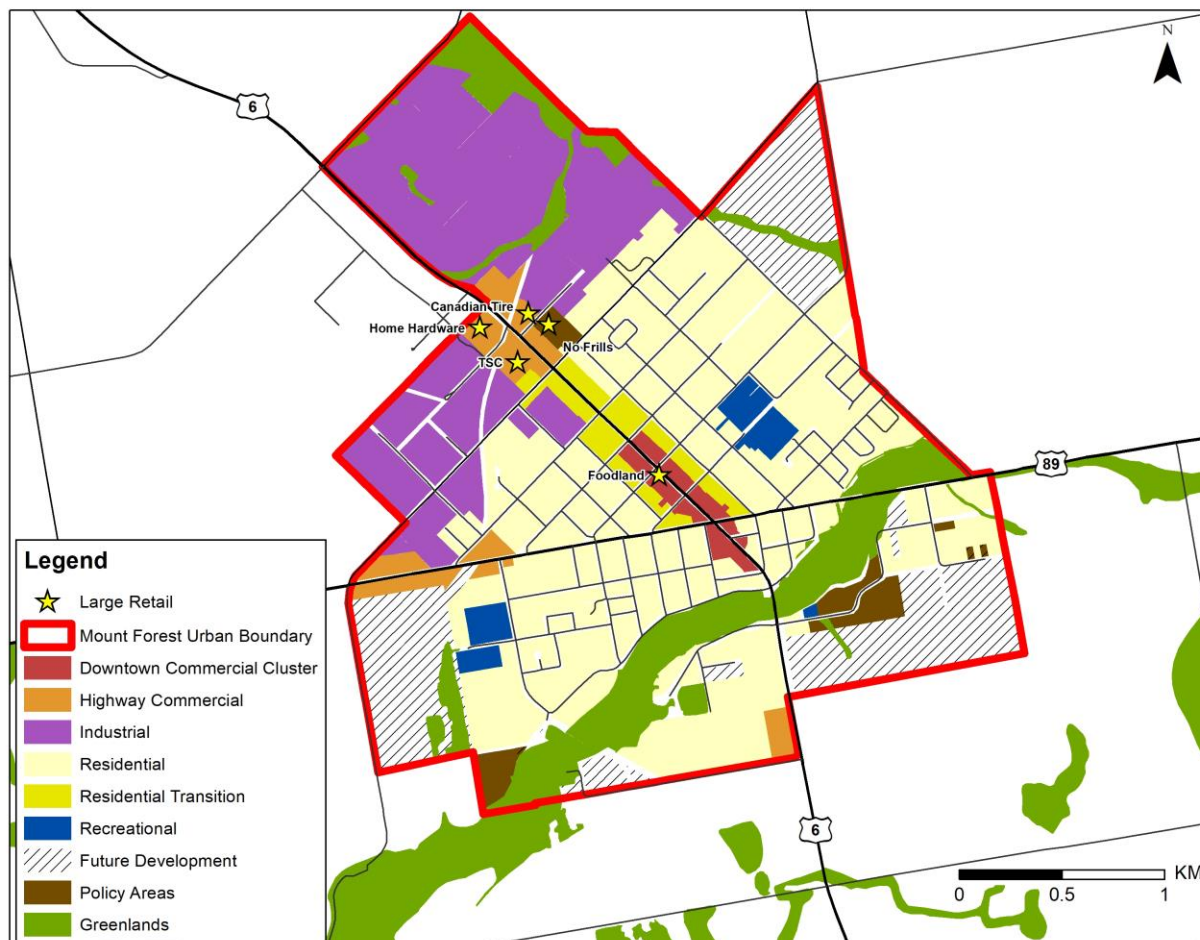
The County should consider changing the definition of Employment Areas to include only Industrial and Rural Employment designations, recognizing that the Highway Commercial designation accommodates major retail which is a sensitive use. Employment Areas are designated at an upper-tier/single-tier level reflecting the importance of the area in accommodating jobs at a regional level.

¹ Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 7.1, p. 72.

² Ibid., p. 22.



Figure 2-3
Mount Forest Urban Centre
Designations and Large Retail Uses



2.3.5 Proposed Changes to the County's Urban System O.P. Policies

As previously discussed, 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 within municipally serviced (water/wastewater) settlements. The County should consider classifying hamlets within the Rural System. The County's Urban Centres with no municipal services (water/wastewater) are also recommended to be classified within the Rural System as Secondary Urban Centres. As such, the County's Urban Centres with full municipal services should be classified as Primary Urban Centres. Figure 2-4 provides an illustration of the proposed Urban System structure.



The County should consider modifying the Employment Area definition in the County's O.P. to include only areas identified in the O.P. as Industrial and Rural Employment Areas.

2.3.6 Proposed Urban System Structure Components

The following are proposed Urban System Components:

- Primary Urban Centres;
- Urban Employment Areas (lands designated as industrial);
- D.G.A.; and
- B.U.A.

As discussed later in this report, the majority of the County's population growth (approximately 88%) over the 2016 to 2051 period is allocated to the Urban System. Further, approximately 85% of the County's employment growth is allocated to the Urban System and assumes a large portion within Urban Employment Areas. Figure 2-4 illustrates the proposed Urban System in the County, while Figure 2-5 illustrates the Urban and Rural System in the County.



Figure 2-4
County of Wellington
Proposed Urban System

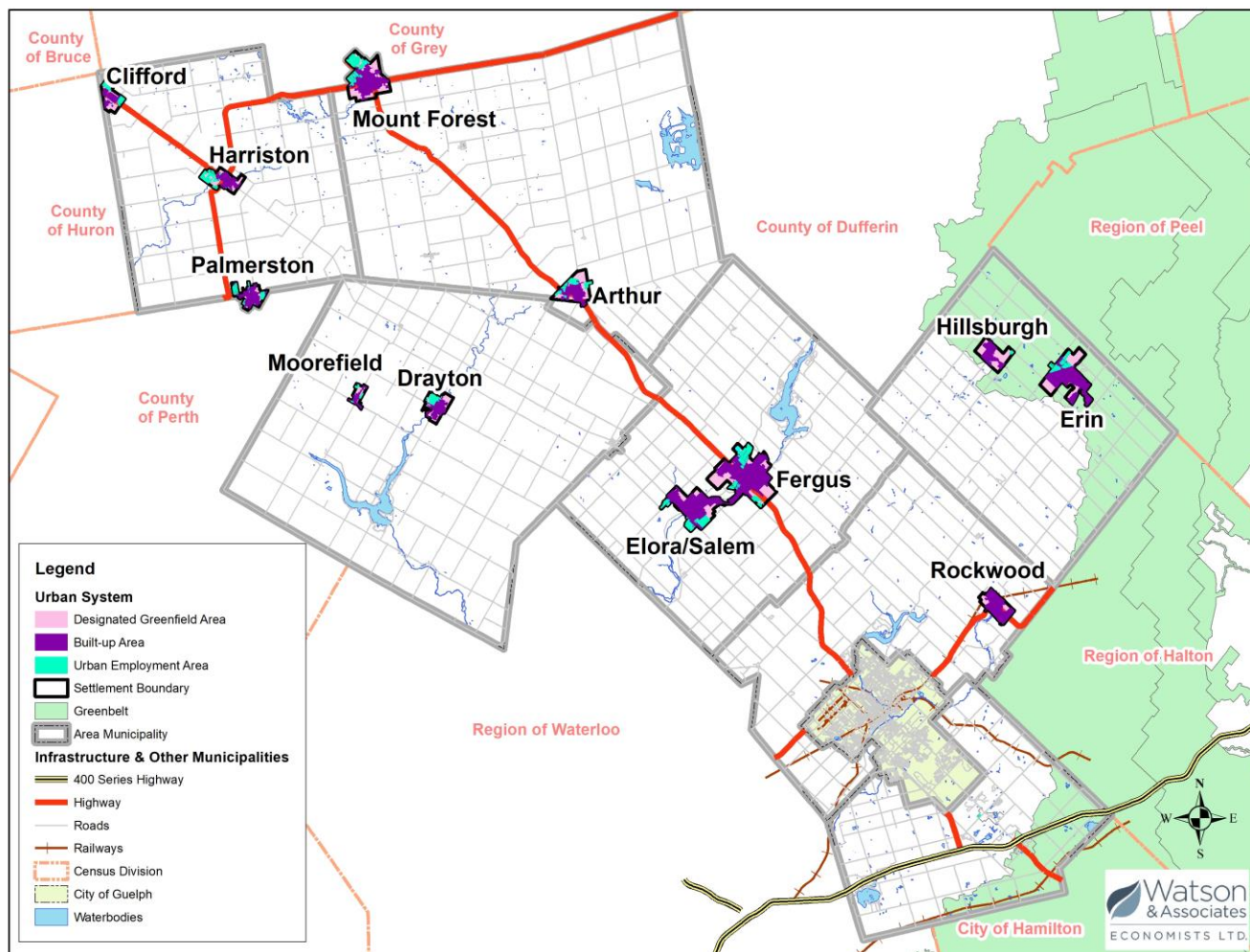
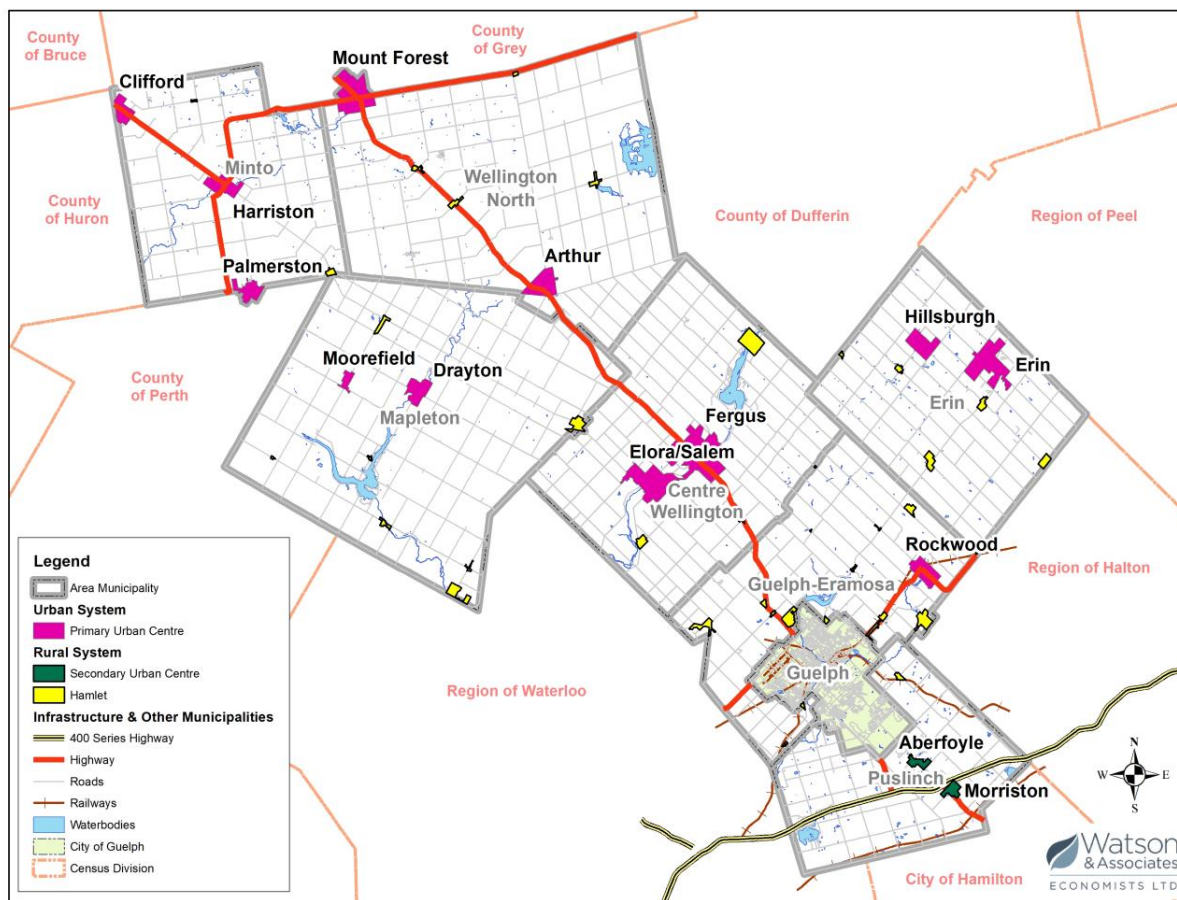




Figure 2-5
County of Wellington
Proposed Urban and Rural System¹



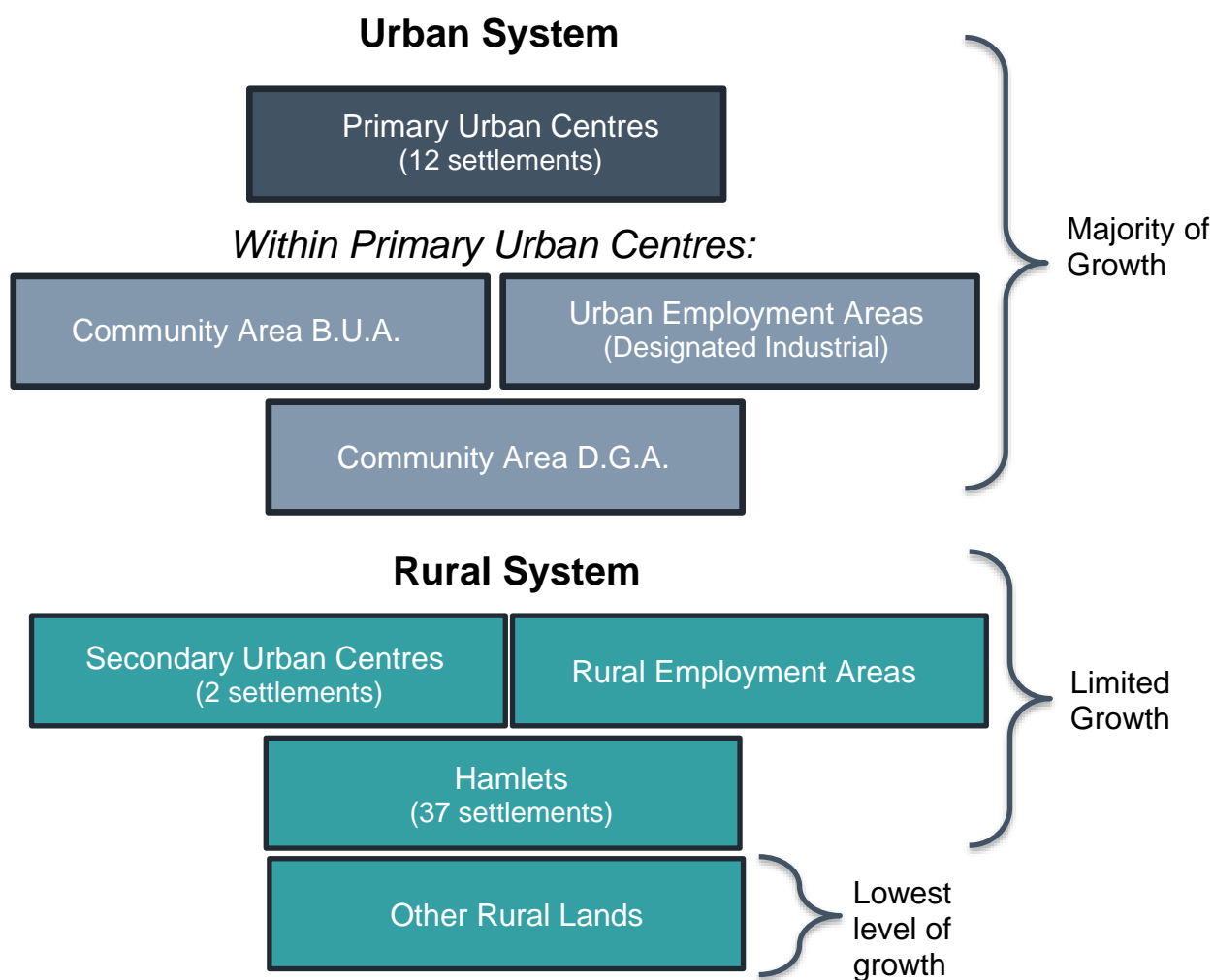
¹ Employment Areas are not shown on map. Employment Areas within the Primary Urban Centres are a part of the Urban System, while Employment Areas not within a Primary Urban Centre are within the Rural System.



2.4 Hierarchy of the County's Settlement Areas

Figure 2-6 provides a proposed hierarchy of the County's settlement area that follows the County's growth allocations by geographic location.

Figure 2-6
County of Wellington
Settlement Area and Structure Hierarchy





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 Wellington 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 Area Municipality is discussed in Chapter 4 – Population and Housing Growth Allocations. The allocation of residential development by policy area location (D.G.A., B.U.A. and Rural Area) will be discussed in the M.C.R. Phase 2 Report – Urban Land Needs Assessment.

3.1 Introduction

3.1.1 What Drives Population and Employment Growth?

A broad range of considerations related to demographics, economics and socio-economics are anticipated to impact future population and employment growth trends throughout the County of Wellington 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 Wellington is strongly correlated with the growth outlook and competitiveness of the economy within the County of Wellington 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 Wellington. Potential employment opportunities within the County of Wellington and surrounding commuter-shed represent the primary driver of net migration to this area.

The employment base within the County of Wellington and 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) which 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 Wellington 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 Wellington County are provided in section 3.4.

3.1.2 Population, Housing and Employment Forecasting Approach

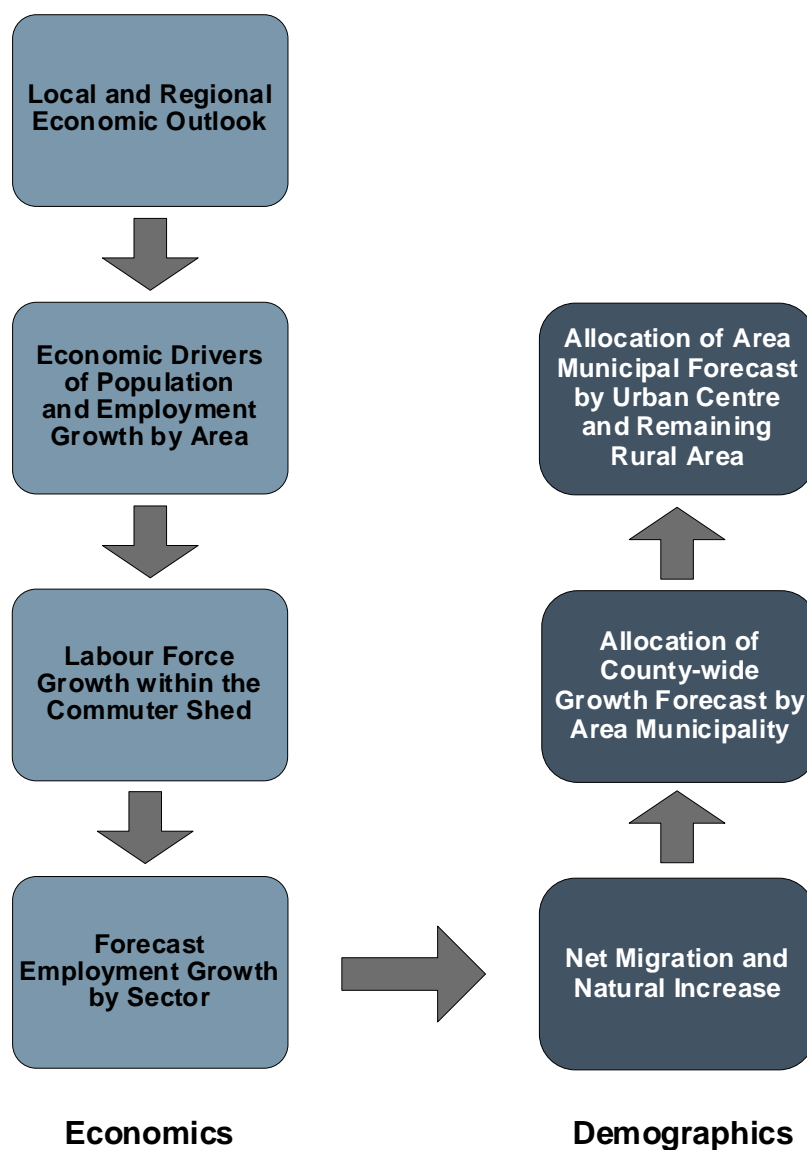
The population, household and employment growth forecast provided herein has been developed in accordance with the provincial L.N.A. methodology. The provincial L.N.A. methodology requires a population forecast by age structure and a housing forecast to be completed by applying an age-specific household 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.) compared to households occupied by younger and older adults (19 to 29 and 65+ age groups). This is important because, as the County's population ages over the forecast planning horizon, the County's average P.P.U. is anticipated to decline. 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 include 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 Wellington O.P. definitions¹ 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 Wellington O.P. also includes duplexes.
- Medium-density residential development includes ground-oriented townhouse units, also referred to as rows and apartments in duplexes (one of two dwellings, located one above the other). The definition of medium density residential development in the County of Wellington O.P. includes multiples, or all other housing types not classified as low density, however with a density maximum of 75 apartment units per hectare and 35 townhouse units per hectare.²
- 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 units added to a single detached, semi-detached or townhouse housing unit is considered high density, reflecting the average occupancy of these units. The County of Wellington O.P. does not provide a definition of high-density residential development.

The Phase 2 Report will include a forecast of second units as part of the intensification analysis.

¹ The local O.P.s of the Township of Centre Wellington and the Town of Erin O.P. definitions of housing by type are similar to the County of Wellington O.P.

² County of Wellington, Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 8.3.4 and Policy 8.3.5, p. 79 and p. 80.



Figure 3-2
Housing Structure Type Classification

Housing Structure Type	County of Wellington M.C.R. Forecasts, 2021	County of Wellington O.P.
Single-Detached and Semi-Detached	Low Density	Low Density
Duplex	Medium Density	Low Density
Townhouse/Row		Medium Density
Apartments	High Density	Medium Density (maximum 75 units per ha)
Secondary Units		Low Density

3.2 Review of Historical Census Population Growth Trends

3.2.1 County of Wellington Population Growth, 2001 to 2016

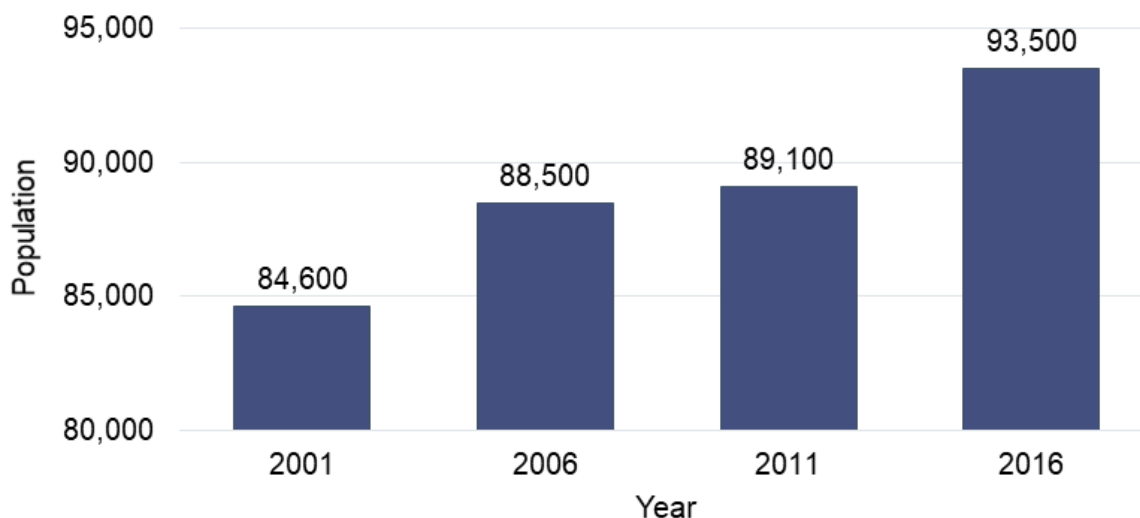
Figure 3-3 summarizes historical population for the County of Wellington over the 15-year period from 2001 to 2016. As illustrated, the County's population base increased from 84,600 in 2001 to 93,500 in 2016. Over the past decade, the population base within the County has increased by 8,900 persons, or approximately 0.7% per year. As a comparison, the average annual growth rate within the G.G.H. was 1.3%.

Figure 3-4 identifies the municipalities within the G.G.H., but outside of the Greater Toronto and Hamilton Area (G.T.H.A.) that comprise 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 had an average annual population growth rate of 1.0% over the 2001 to 2016 period. As summarized in Figure 3-4, within the G.G.H. Outer Ring, the City of Barrie, the County of Simcoe and the City of Guelph experienced the highest rate of annual population growth rate within the G.G.H. Outer Ring. The County of Wellington annual population growth rate was in the middle of the annual population growth range of the 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 Wellington represented 3% of the population growth within the G.G.H. Outer Ring.

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



Note: Population includes census undercount estimated at 3%.

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



Figure 3-4
Greater Toronto and Hamilton Area (G.T.H.A.) and Greater Golden Horseshoe
(G.G.H.) Outer Ring

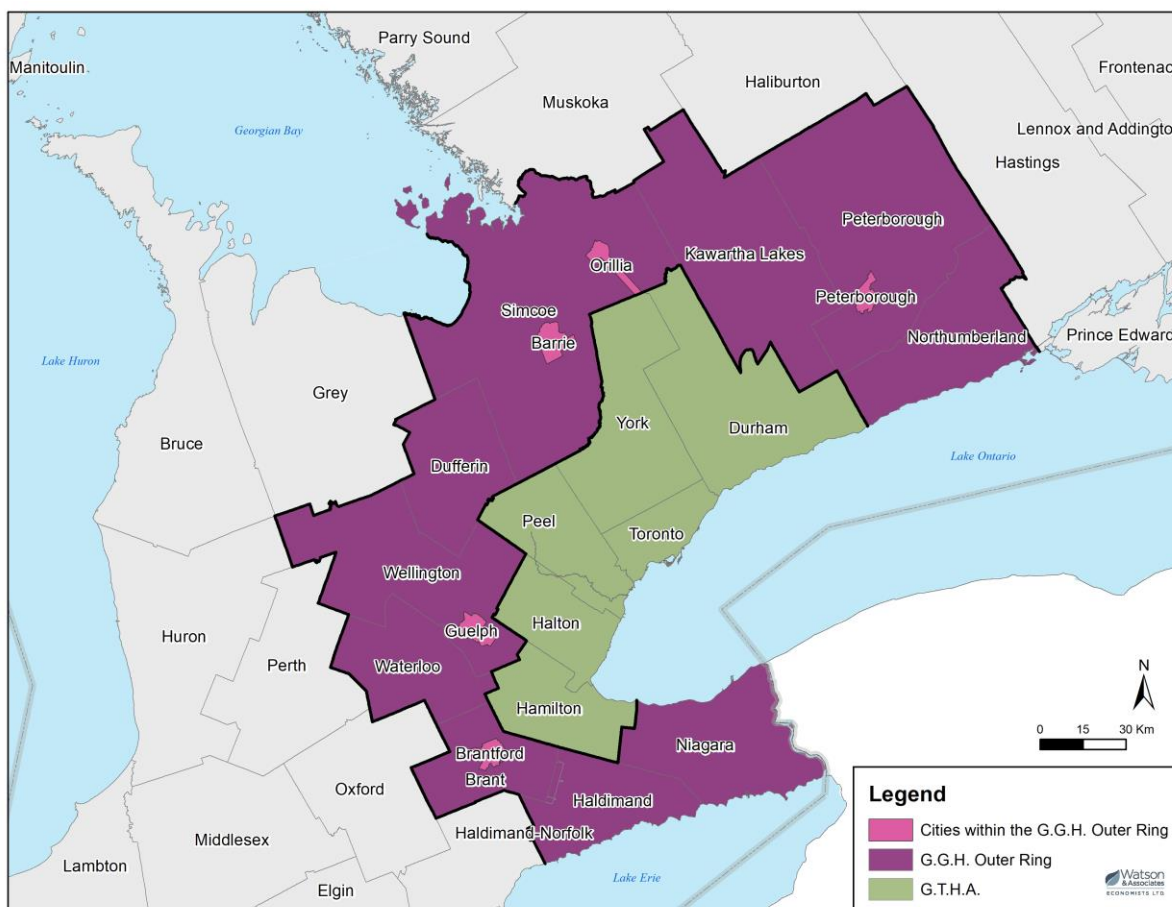
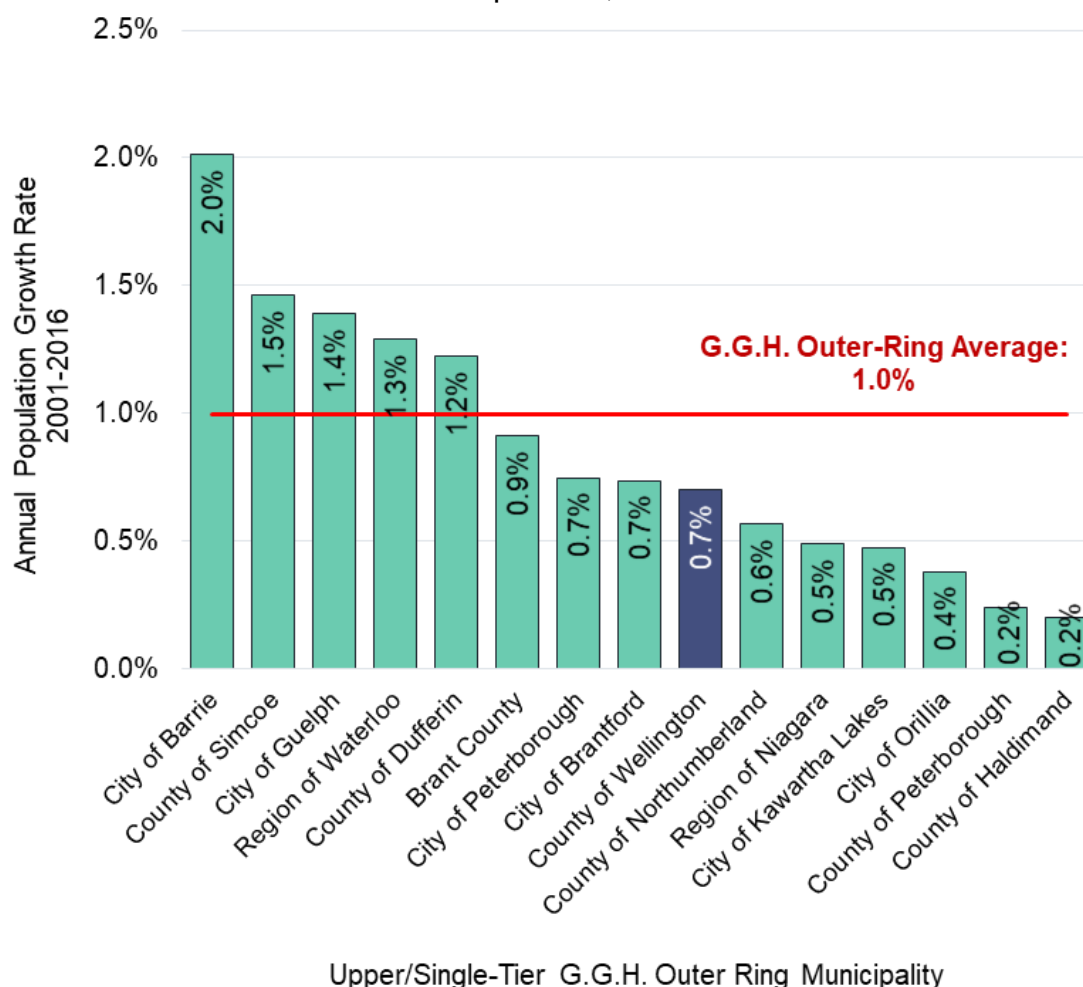




Figure 3-5
Outer Ring G.G.H.
Historical Population, 2001 to 2016



Source: Derived from Statistics Canada Demography Division data by Watson & Associates Economists Ltd., 2020.

3.2.2 County of Wellington Population Growth, 2001 to 2016

Figure 3-6 summarizes historical trends in population structure by age major group over the 2001 through 2016 period. Key observations regarding the County of Wellington historical population by age include the following:

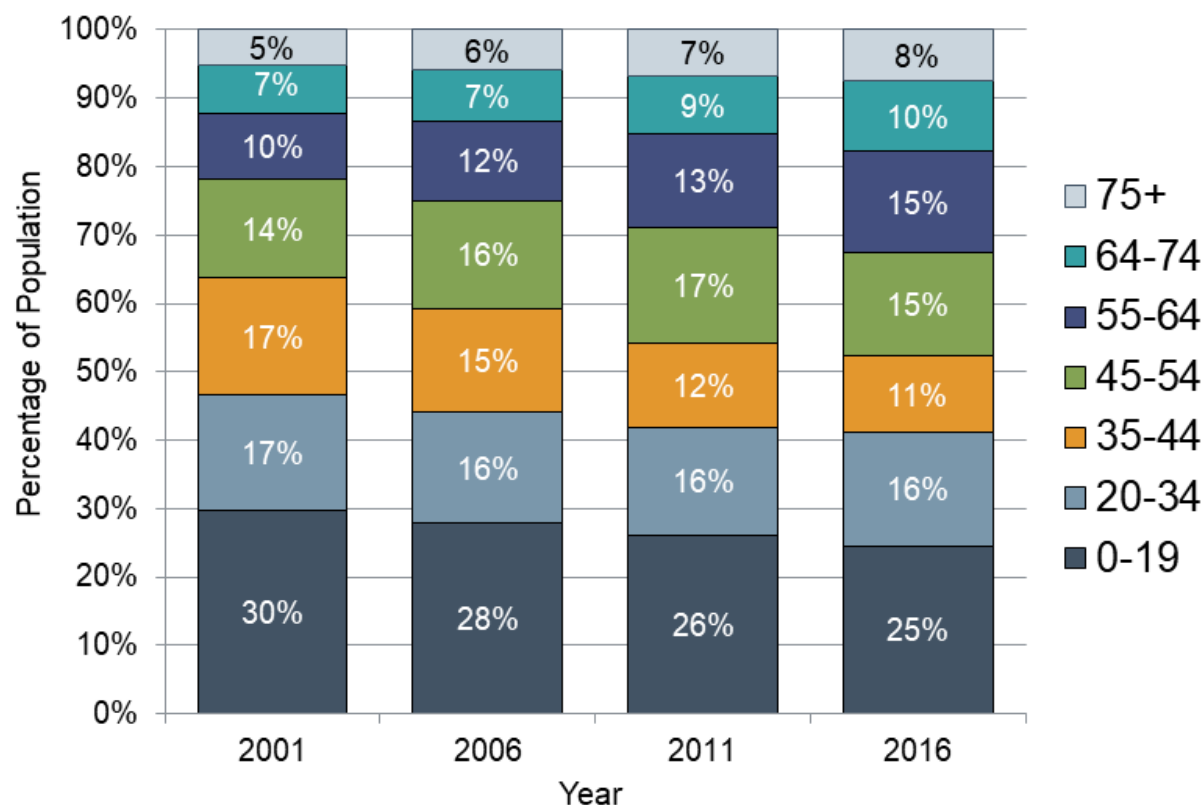
- In 2016, the 0-19 age group (youth population) in the County of Wellington accounted for 25% of the total population. Over the 2001 to 2016 period, the population in this age cohort decreased by 2,200, declining in population share from 30% to 25%;



- The County's young adult/adult population share (20-54 years of age) has declined over the same period, comprising approximately 48% of the population in 2016:
 - The 20-34 age cohort (young adults), which comprised an estimated 16% of the population in 2016, has slightly decreased in proportion from 17% in 2001;
 - The percentage of the 35-44 age group decreased from 17% in 2001 to 11% in 2016;
 - The percentage of adults 45-54 years old account for 15% of the 2016 population, up slightly from 14% in 2001;
- The County's 55-64 (i.e. empty nesters) and seniors' population share has increased significantly over the same period, specifically:
 - The 55-74 age group (empty nesters/younger seniors) increased by 8 percentage points between 2001 and 2016, from 17% to 25%;
 - The 75+ age group (older seniors) has increased moderately from 5% in 2001 to 8% in 2016. Looking forward, 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 3-6
County of Wellington
Population by Age Cohort, 2001 to 2016



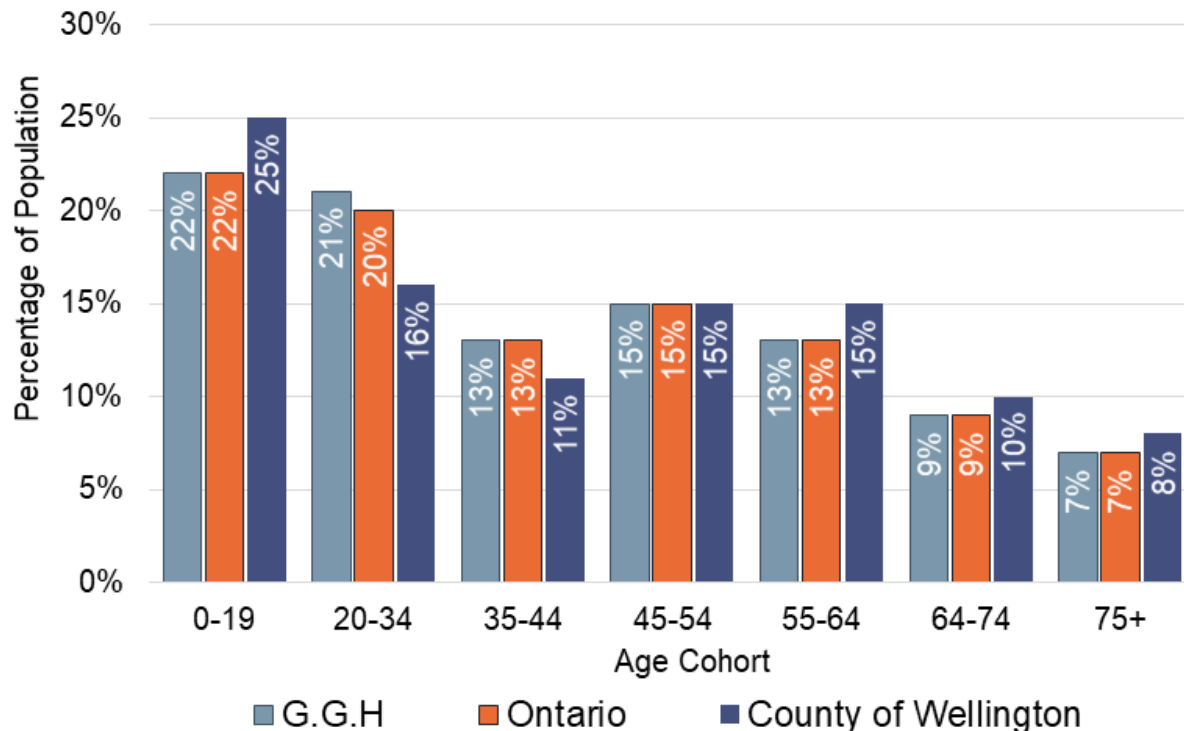
Source: 2001 to 2016 derived from Statistics Canada census by Watson & Associates Economists Ltd.
Note: Includes census undercount of approximately 3%.

Figure 3-7 summarizes the 2016 population age structure in the County of Wellington compared to the G.G.H. and Province of Ontario as a whole. Key observations regarding the County of Wellington 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 to 19), the County of Wellington 2016 age structure is older than that of the G.G.H. and provincial average;
- A slightly lower proportion of the population in the County of Wellington is concentrated in the 20-44 age group in comparison to the G.G.H. and Province of Ontario as a whole; and
- The County of Wellington has a higher proportion of adults over the age 55, when compared to the G.G.H. and Province of Ontario.



Figure 3-7
County of Wellington,
G.G.H. and Ontario Population by Age Cohort, 2016



Note: Population includes net Census undercount.

Source: Population by age derived from 2016 Statistics Canada Census and Annual Demographics Statistics data from Watson and Associates Economists Ltd, 2020.

3.3 Review of Historical Census Housing Growth Trends

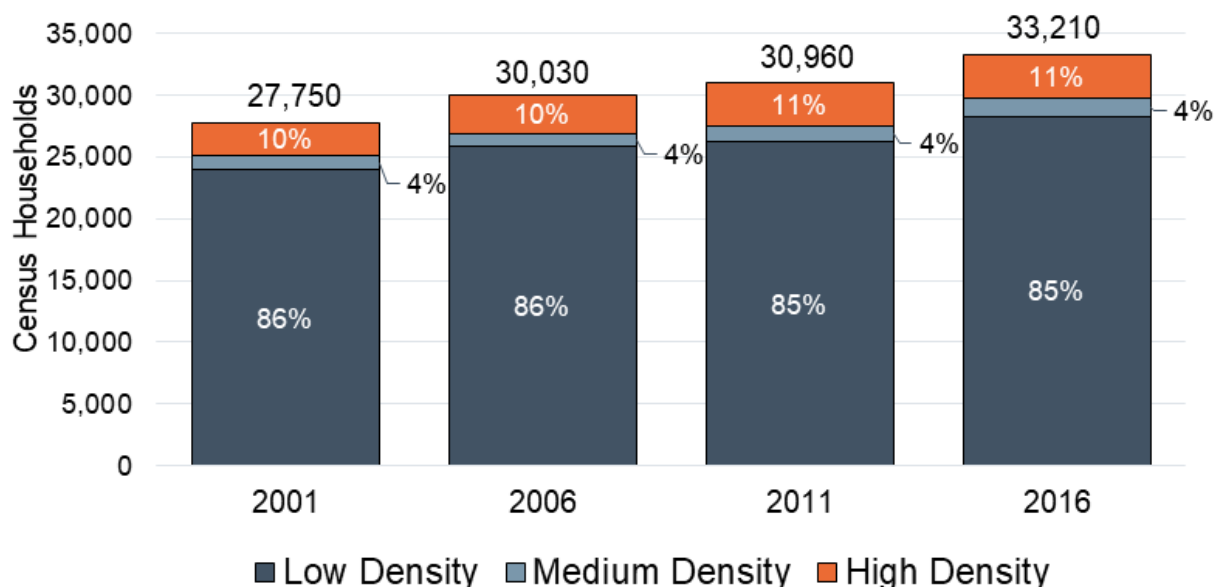
3.3.1 County of Wellington Housing Trends, 2001 to 2016

Similar to population growth trends, the County of Wellington has experienced a steady rate of housing growth over the past 15 years as measured by Statistics Canada Census data. During this historical period, the County's housing base has increased by approximately 5,460 households from 27,750 to 33,210, which represents an increase of approximately 360 Census housing units per year. Figure 3-8 and Figure 3-9 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 past 15 years (at 80% 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 3-8
County of Wellington
Historical Number of Households, 2001 to 2016



Notes:

Low density includes single-detached and semi-detached.

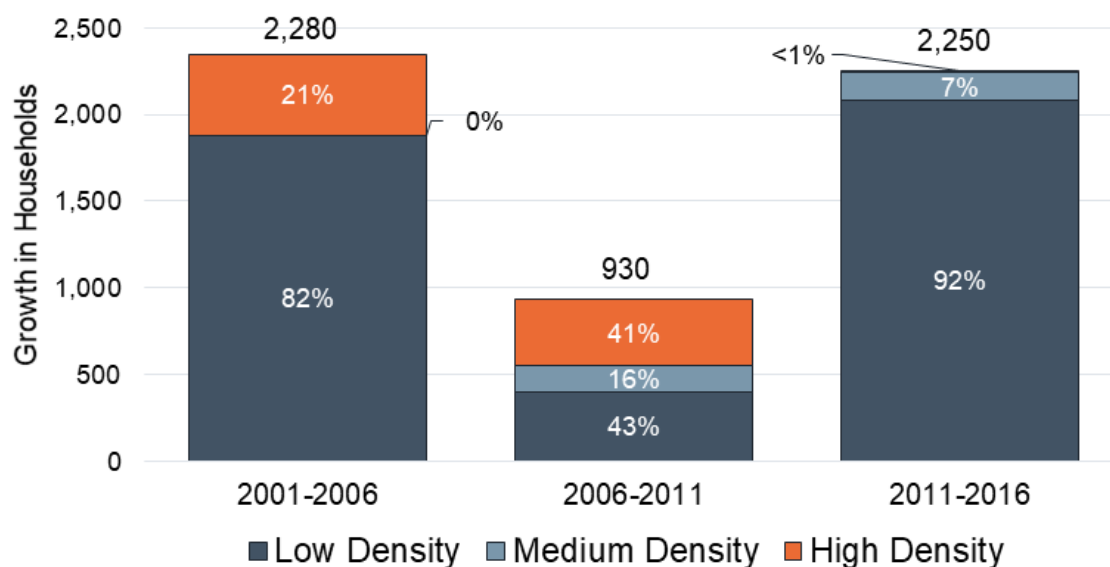
Medium density includes townhouses/rows.

High density includes apartments.

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



Figure 3-9
County of Wellington
Historical Share of Housing Growth by Type, 2001 to 2016



Notes:

Low density includes single-detached and semi-detached.

Medium density includes townhouses/rows.

High density includes apartments.

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

3.3.2 Housing Occupancy Trends within the County of Wellington

3.3.2.1 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 Wellington's total headship rate increased modestly from 32.8% to 35.5% (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 persons per unit (P.P.U.) trends for the County of Wellington, 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.

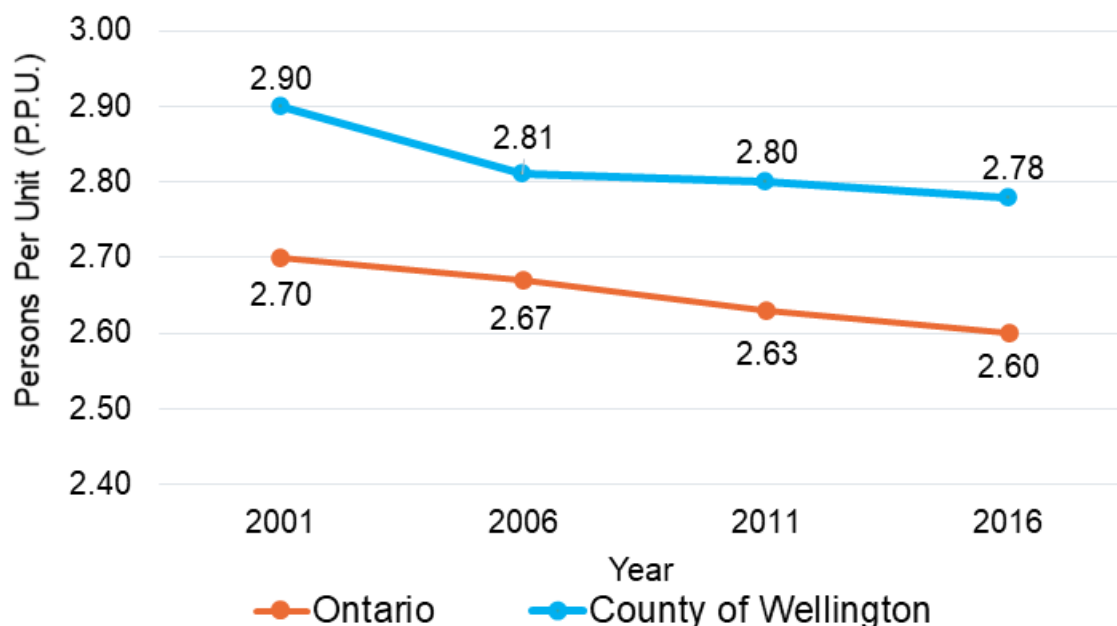
3.3.2.2 County of Wellington P.P.U. Trends

Figure 3-10 summarizes trends in average housing occupancy for the County of Wellington 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:

- The average P.P.U. for the County of Wellington has steadily declined over the 2001 to 2016 period;
- Average housing occupancy levels for the province as a whole are lower relative to the County of Wellington; however, the rate of P.P.U. decline between 2001 and 2016 was higher within the County of Wellington;
- The recent trend toward greater stabilization in average household occupancy within the County of Wellington is largely believed to be a result of delays in adult children leaving home largely due to rising housing ownership and housing rental costs. 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.;
- Over the next 10 years average P.P.U. levels are anticipated to remain stable, largely driven by strong net migration levels associated with young families arriving in the County of Wellington; and
- The average P.P.U. for the County of Wellington 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 years).



Figure 3-10
County of Wellington
Historical Persons Per Unit (P.P.U.) Trends, 2001 to 2016



Source: Statistics Canada Census data, 2001 to 2016.

Note: Population used to calculate persons per unit does not include the net Census undercount.

3.3.2.3 Housing Propensity by Structure Type, 2016

Figure 3-11 summarizes historical housing propensity (i.e. demand) trends by structure type for Census households (private dwellings occupied by usual residents) in the County of Wellington based on 2016 Statistics Canada Census data (additional details regarding forecast age-specific housing propensity as of 2051 is 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 3-11, propensities for low-density housing (single-detached and semi-detached) are high among all age groups over the age of 25. Propensities for high-density housing (apartments) are highest among the under 25 age group at 31%, followed by the over 75 age group.



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

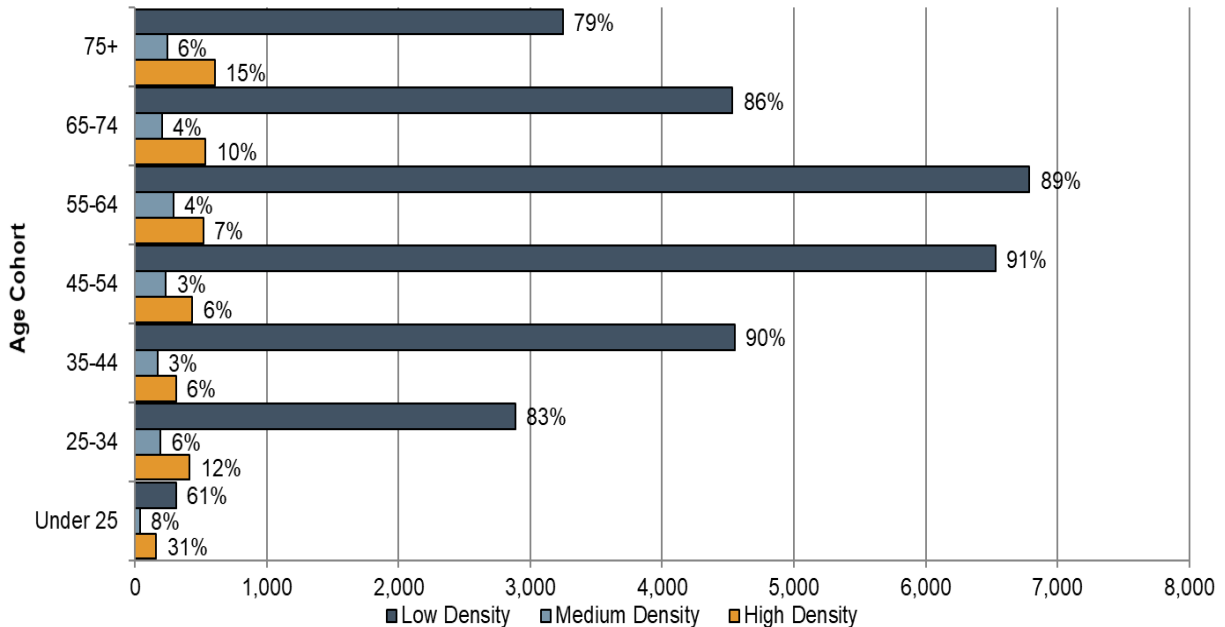
Within the 55+ age group, housing demand related to the 55-74 age group is anticipated to be relatively stronger for ground-oriented housing forms (i.e., single detached, semi-detached and townhouses) which provide proximity to urban amenities, municipal services and community infrastructure. With respect 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) which 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 historical trends largely due to demand from the 75+ age group. The 75+ age group is anticipated to represents the fastest growing age group across the County of Wellington, 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 Wellington 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 D.G.A. as well as in B.U.A. across the County.



Figure 3-11
County of Wellington
Propensity by Structure Type, 2016



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

In addition to population age structure, there are a number of factors such as household income, housing affordability, lifestyle decisions, health, mobility, and planning policy, which also influence the form and type of housing units constructed across the County of Wellington. These additional factors make it difficult to accurately project housing propensity by type over both the short-term period and longer-term planning horizon as the impact of these other socio-economic variables cannot be easily isolated or tested in the County's housing forecast. It is also recognized that the housing propensity analysis summarized above in Figure 3-10 represents one historical information source in developing long-term assumptions regarding forecast housing growth by structure type but should also be supported by a thorough review of more recent and forward-looking data sources. In addition to a review of the housing propensity, the long-term housing forecast prepared for the County was based upon a review of wide range of other data sources, such as recent residential building permit activity/housing completions, market trends in housing prices relative to household income, active residential development applications and post-Censal migration trends within the County of Wellington.

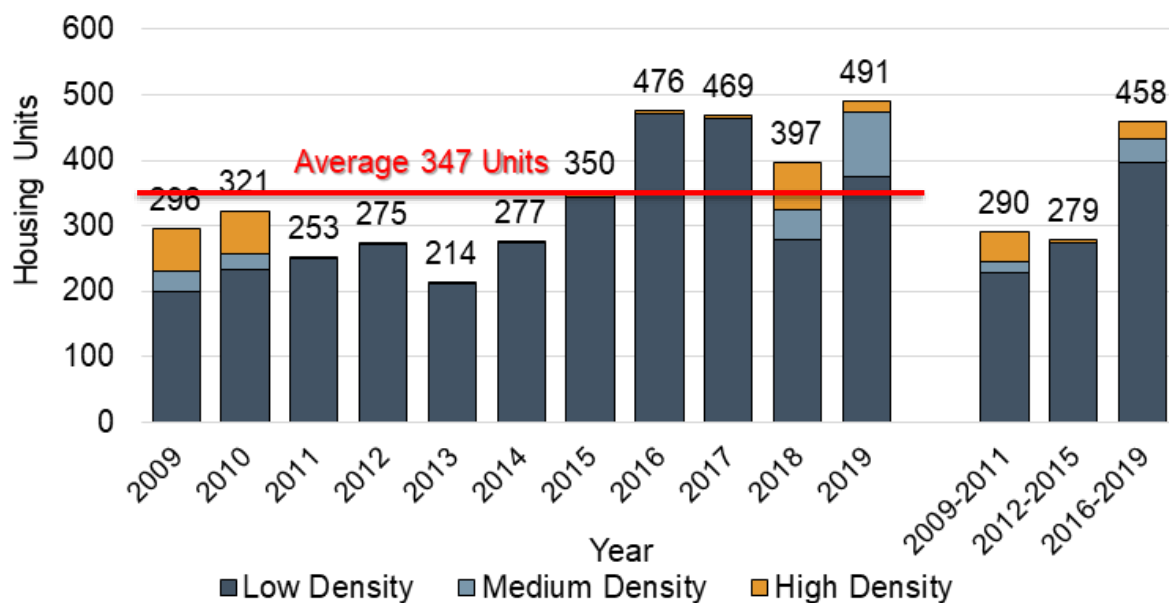


3.3.3 Residential Development Activity by Unit Type, 2009 to 2019

Figure 3-12 summarizes total residential building permits by structure type from 2009 to 2019 for County of Wellington. Key observations include:

- The number of residential building permits (new units only) issued for County of Wellington between 2009 and 2019 has averaged 347 permits per year;
- The average number of residential building permits has increased since 2015, averaging 458 units annually over the 2016 to 2019 period; and
- The average number of building permits issued for high-density and medium-density housing units increased over the past two years, although still representing a small share of the residential permits issued.

Figure 3-12
County of Wellington
Residential Building Permit Activity by Housing Type (New Units Only),
2006 to 2019



Notes:

Low density includes single-detached and semi-detached.

Medium density includes townhouses and apartments in duplexes.

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

Source: 2009 to 2019 building permit data from Wellington County Planning Department, by Watson & Associates Economists Ltd., 2020.



3.3.4 County of Wellington Housing Potential 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 3-13 provides a summary of the potential residential development on vacant lands within the County of Wellington. The potential housing supply includes potential housing development that have been 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, approximately 69% of the housing unit potential, followed by medium-density housing at 21% and high-density housing at 10%.

With respect to housing potential that is approved and within active applications (under review), an indication of shorter-term housing demand, the County has approximately 8,040 units. Of these, approximately 66% is low density, followed by medium density at 22% and high density at 11%. Housing potential within the active development applications suggest a trend towards a wider range of housing types compared to historical trends.

Figure 3-13
County of Wellington
Housing Potential on Vacant Lands by Status, Mid-2019

Total	Low Density	Medium Density	High Density	Total Units	
				Units	%
Registered Unbuilt	1,272	233	350	1,855	13%
Draft Approved/Provisional	2,695	1,090	168	3,953	28%
Application Under Review	1,376	458	397	2,231	16%
Sub-Total	5,343	1,781	915	8,039	56%
Other Remaining Vacant (no application)	4,595	1,167	540	6,302	44%
Total	9,938	2,948	1,455	14,341	100%
Share (%)	69%	21%	10%	100%	

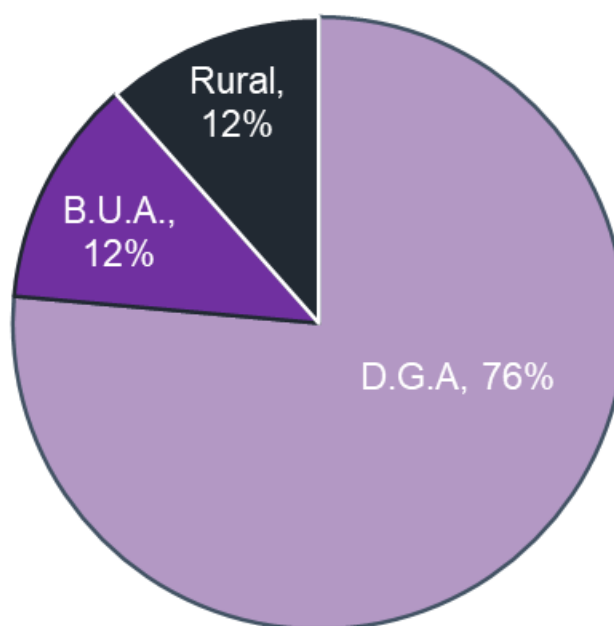
Source: Based on County of Wellington GIS Data, July 2019.

Figure 3-14 provides a summary of housing potential on vacant lands by policy area (B.U.A., D.G.A. and Rural Area). As summarized, just over two-thirds of future housing supply potential is within the D.G.A. The B.U.A. represents approximately 12% of the housing unit potential, comprising 55% low density, followed by medium density at 23%



and high density at 10%. The Rural Area is estimated to comprise 12% of the housing potential within the County, or approximately 1,700 potential dwelling units. It is important to note that the housing potential within the Rural Area excludes a review of severance potential which is currently under review by the County of Wellington. Further details regarding housing potential by Area Municipality is provided in Chapter 4, Population and Housing Allocations by Area Municipality.

Figure 3-14
County of Wellington
Housing Potential on Vacant Lands by Policy Area,
Mid-2019



Source: Based on County of Wellington GIS Data, July 2019.

3.4 Population and Housing Growth Forecast to 2051

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

As previously mentioned, a key driver of the County of Wellington'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 G.G.H. industrial and office commercial real estate markets within this region 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 US border. In turn, this continues to support steady population and housing growth within this region, 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 3-15, due to its geographic location within the western region of the G.G.H. Outer Ring, Wellington County 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.



Figure 3-15
County of Wellington within the Context of the G.G.H.

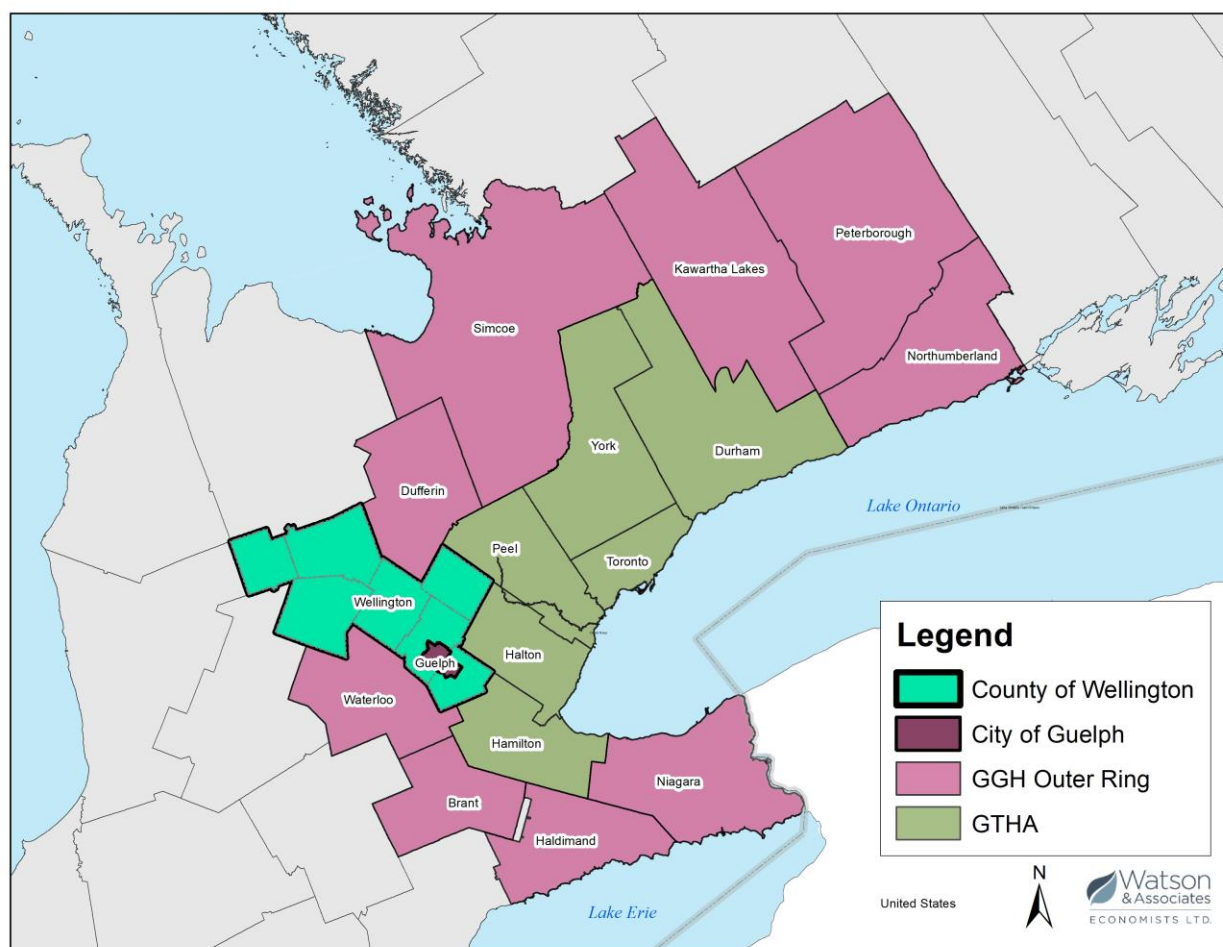


Figure 3-16 through Figure 3-18 summarize the historical and long-term population employment growth forecast for the G.G.H. between the G.T.H.A. and the G.G.H. Outer Ring. Figures 3-16 and 3-17 identify that the G.T.H.A. has historically experienced a higher rate of population and employment relative to the G.G.H. Outer Ring over the 2001 to 2016 period. Looking forward, the forecast annual population and employment growth rate of the G.G.H. Outer Ring is 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 3-16
Historical and Forecast Population Growth for the G.G.H.
2001 to 2051

Area	Total Population			2001-2016		2016-2051	
	2001	2016	2051	Total Population Growth	Annual Population Growth Rate	Total Population Growth	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	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, 2001 and 2016. 2016 to 2051 derived from Growth Plan for the G.G.H., 2019, by Watson & Associates Economists Ltd., 2019.

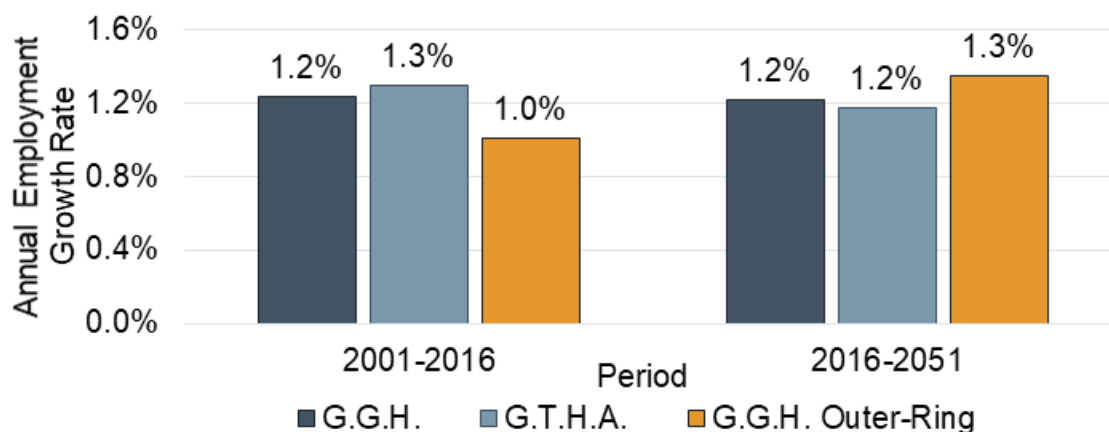
Figure 3-17
Historical and Forecast Employment Growth for the G.G.H.
2001 to 2051

Area	Total Employment			2001-2016		2016-2051	
	2001	2016	2051	Total Employment Growth	Annual Employment Growth Rate	Total Employment Growth	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	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, 2001 and 2016. 2016 to 2051 derived from Growth Plan for the G.G.H., 2019, by Watson & Associates Economists Ltd., 2019.



Figure 3-18
Historical and Forecast Annual Employment Growth Rate for the G.G.H.,
2001 to 2051



Source: 2001 to 2016 derived from Statistics Canada Census data. 2016 to 2051 derived G.G.H. Growth Forecasts to 2051 Technical Report, by Watson & Associates Economists Ltd., 2020.

3.4.2 Regional Economic Opportunities

As previously discussed in Chapter 2, Wellington County is characterized by a blend of expansive rural lands and vibrant Urban Centres. 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 Wellington, 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 Wellington over the long term.

The existing employment base in the County of Wellington is concentrated in a number of export-based and community-based employment sectors. The County's employment base is particularly concentrated in manufacturing, construction, agriculture, retail and wholesale trade. Many of these sectors are also anticipated to represent the fastest growing segments of the regional economy, however it is also noted that at 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 5.

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 the City of Guelph, City of Waterloo, City of Kitchener, and City of Cambridge.

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. The economic base is also highly oriented towards small businesses and home-based occupations. The County is also rich in architectural heritage with numerous historic homes, 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 an estimate of approximately 4,200 jobs related to the agricultural and primary sector as of 2019, the agricultural sector represents the County's fourth largest sector in terms of employment. Agri-business and food processing provide an opportunity to deepen agricultural activity and increase productivity of the industry by providing value-added products and services, which in turn also help drive the County's tourism sector. It is one of the key planning principles for the County to promote and protect the predominately 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 agriculture and agri-food system encompass 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.

Wellington County has also experienced steady employment growth in the transportation and warehousing sector over the past decade, most notably in the Township of Puslinch. 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 Wellington County.



As the employment base continues to grow within the County and 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 Wellington 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 Wellington 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 Wellington.

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, in attracting new residents and business development over the long term.

3.4.4 *County of Wellington Recommended Growth Forecast to 2051*

The long-term growth population and employment forecast for the County of Wellington, 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 Wellington. These factors are summarized below to further rationalize the Growth Plan, 2019 long-term population and employment growth for the County of Wellington to the year 2051, as the recommended long-term growth scenario

As illustrated in Figure 3-19 and Figure 3-20, the population and employment base for the County of Wellington grew at an annual rate of 0.7% and 1.7%, respectively

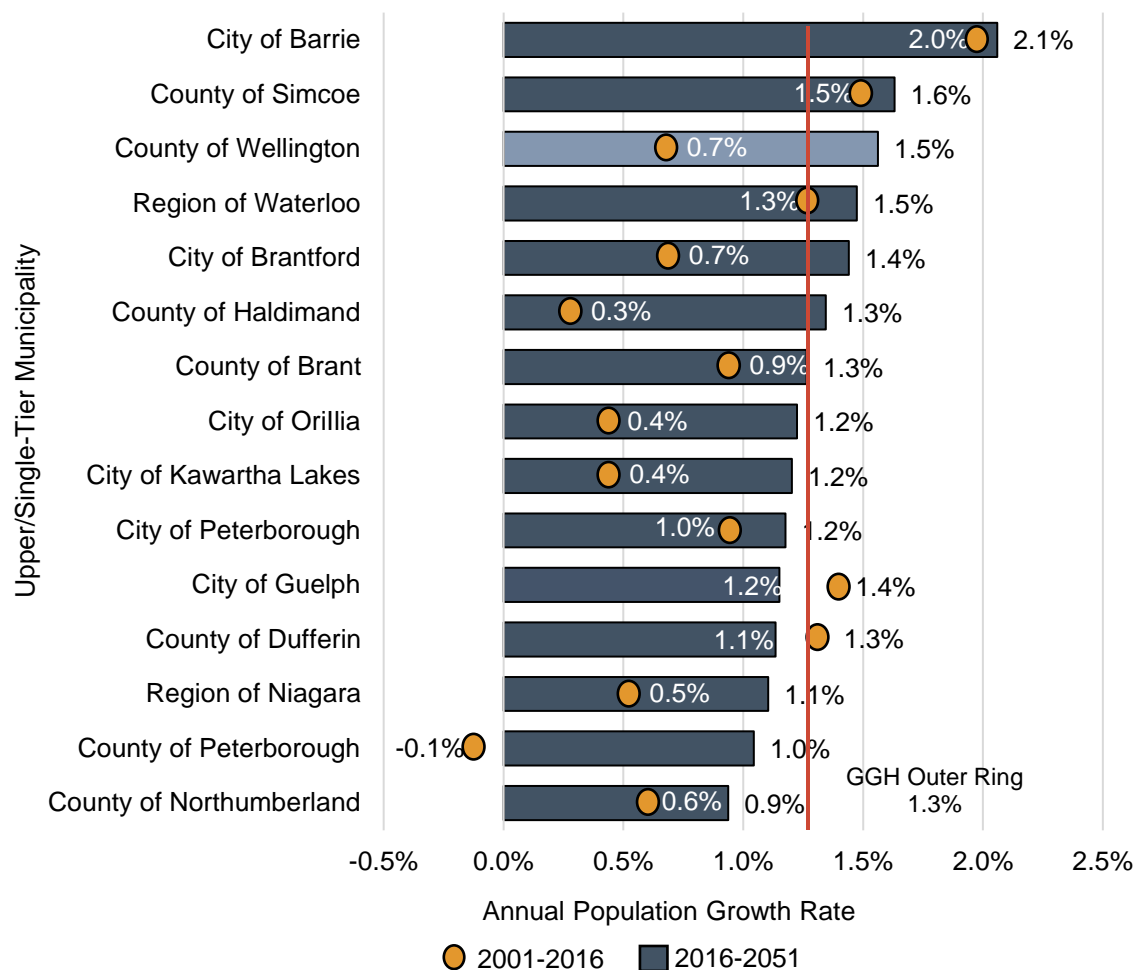


between 2001 and 2016. Over the 2016 to 2051 forecast period, the rate of annual population growth within the County of Wellington is forecast to more than double. While the rate of forecast employment growth (2016 to 2051) is anticipated to remain relatively constant to historical trends (2001 to 2016), the County's annual level employment growth level in absolute terms is forecast to increase by approximately 45%. Further details regarding the County's long-term employment outlook are provided in Chapter 5.

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 Wellington, the long-term growth outlook for the County, as outlined in the Growth Plan, 2019 is considered aspirational, but appropriate for the purposes of long-range planning.



Figure 3-19
G.G.H. Outer Ring, Annual Population Growth Rate by Municipality, 2016 to 2051
(Schedule 3)

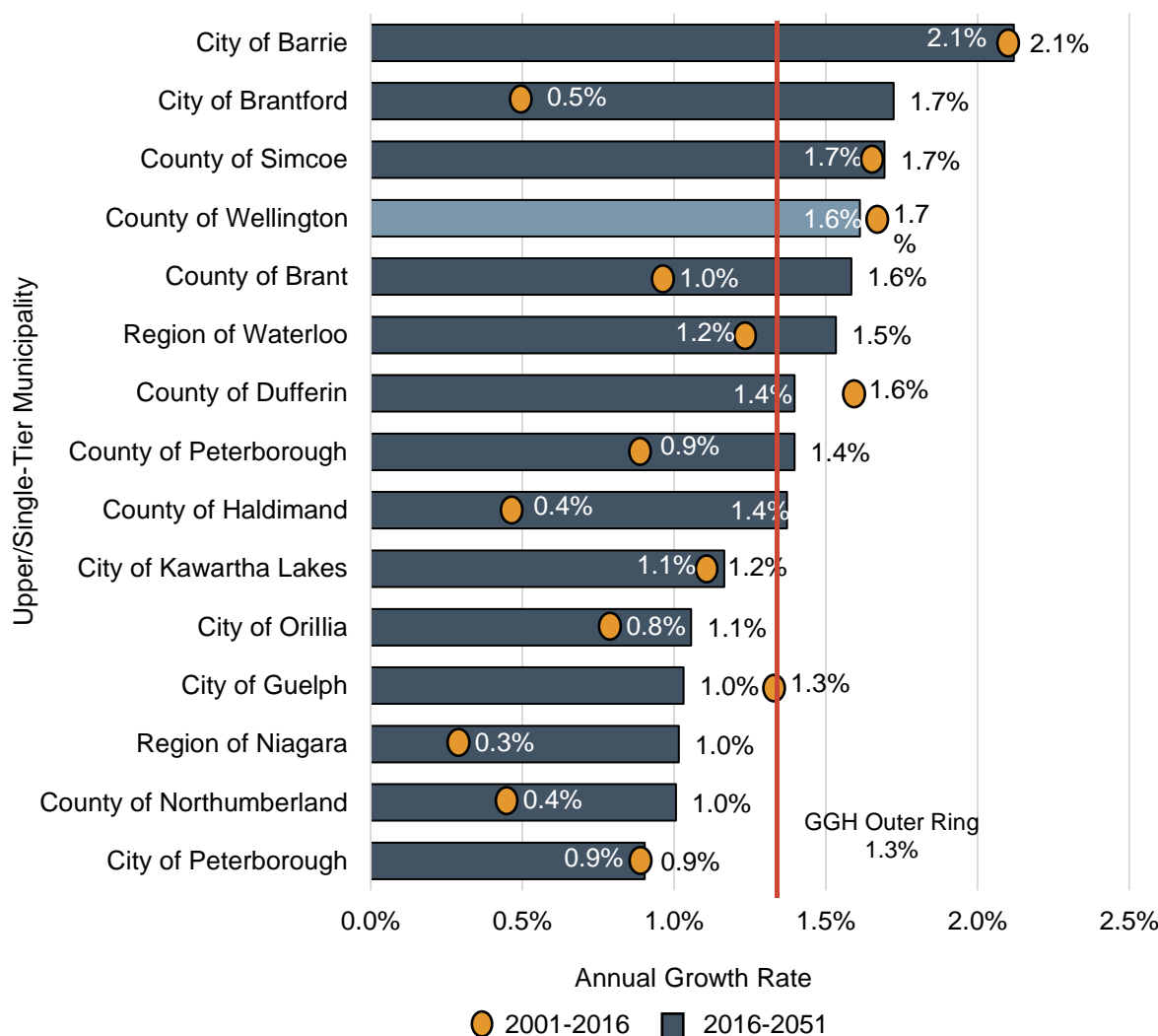


Note: Population includes the net Census undercount.

Source: Derived from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, August 26, 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd., 2020.



Figure 3-20
County of Wellington Share of G.G.H. Outer Ring
Employment, 2016 to 2051 (Schedule 3)



Source: Derived from Greater Golden Horseshoe: Growth Forecasts to 2051 Technical Report, August 26, 2020, Hemson Consulting Ltd., by Watson & Associates Economists Ltd., 2020.

As illustrated in Figure 3-21, the County of Wellington has historically accommodated a steady share of G.G.H. Outer Ring population and an increasing share of employment within the G.G.H. Outer Ring. Looking forward, the County of Wellington's population and employment base is forecast to grow at a faster rate relative to the G.G.H. Outer Ring as a whole. As such, the share of total G.G.H. Outer Ring population and



employment within the County of Wellington is forecast to slightly increase over the long-term planning horizon.

Figure 3-21
County of Wellington Share of G.G.H. Outer Ring
Population and Employment, 2001 to 2051 (Schedule 3)



Source: 2001 to 2016 derived from Statistics Canada Census, 2001 and 2016. 2016 to 2051 derived from Growth Plan for the G.G.H., 2019, by Watson & Associates Economists Ltd., 2020.

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 G.G.H. Outer Ring. The most recent M.O.F. population projections (Summer 2020) 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 Wellington 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. While it is anticipated that long-term population growth rates within



the G.G.H. Outer Ring will continue to outpace the G.T.H.A., it is important to recognize that Wellington County is currently tracking slightly below Wellington County's Official Plan population forecast. It is noted that recent population estimates factor in a robust residential building permit activity during the post-2016 period.¹

As previously mentioned, the County's population is getting older on average, 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 also places downward pressure on labour force participation rates and ultimately labour force growth over the long-term. As summarized in section 3.4.5, 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 Wellington 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 Wellington. The Schedule 3 Growth Plan, 2019 forecast for Wellington 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 increase in the share of total population and employment in the County of Wellington 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 Wellington is not supported for the purposes of long-term growth management and urban land needs analysis.

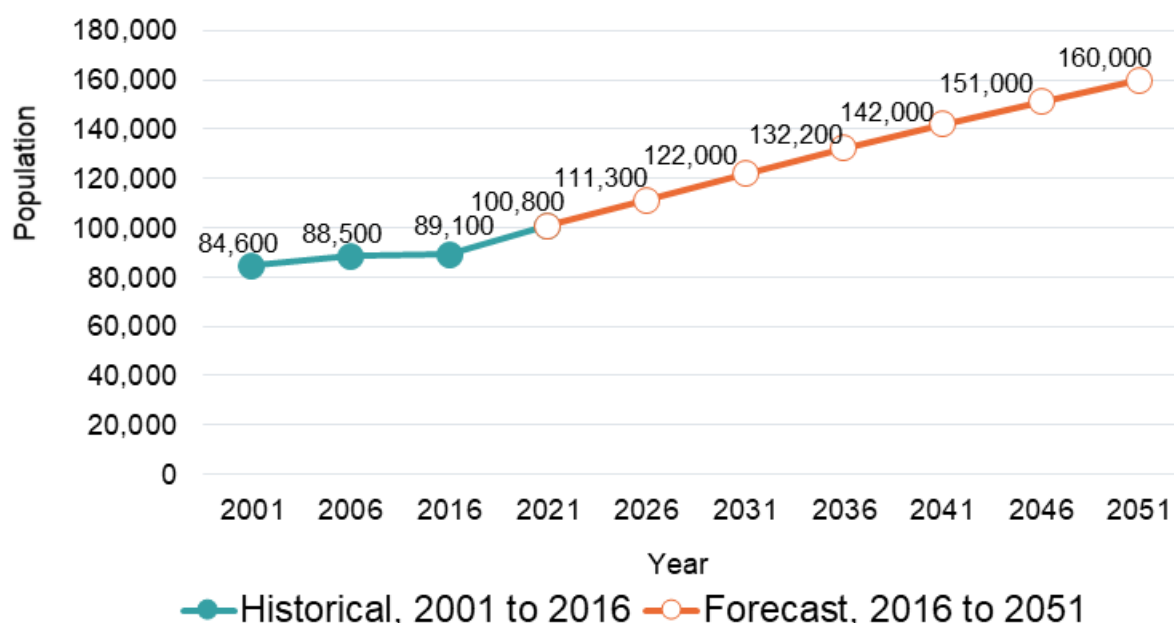
¹ Wellington County Population, Household and Employment Forecast Update, 2011 – 2041. Final. May 5, 2015.



3.4.5 County of Wellington Population Forecast to 2051

Figure 3-22 summarizes the County of Wellington total population growth forecast over the 2016 to 2051 forecast period relative to historical population between 2001 and 2016. By 2051, the County of Wellington total population base is forecast to grow to approximately 160,000. This represents an increase of approximately 66,400 persons between 2016 and 2051, or an average annual population growth rate of 1.5% during this time period.

Figure 3-22
County of Wellington
Population Growth Forecast to 2051



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

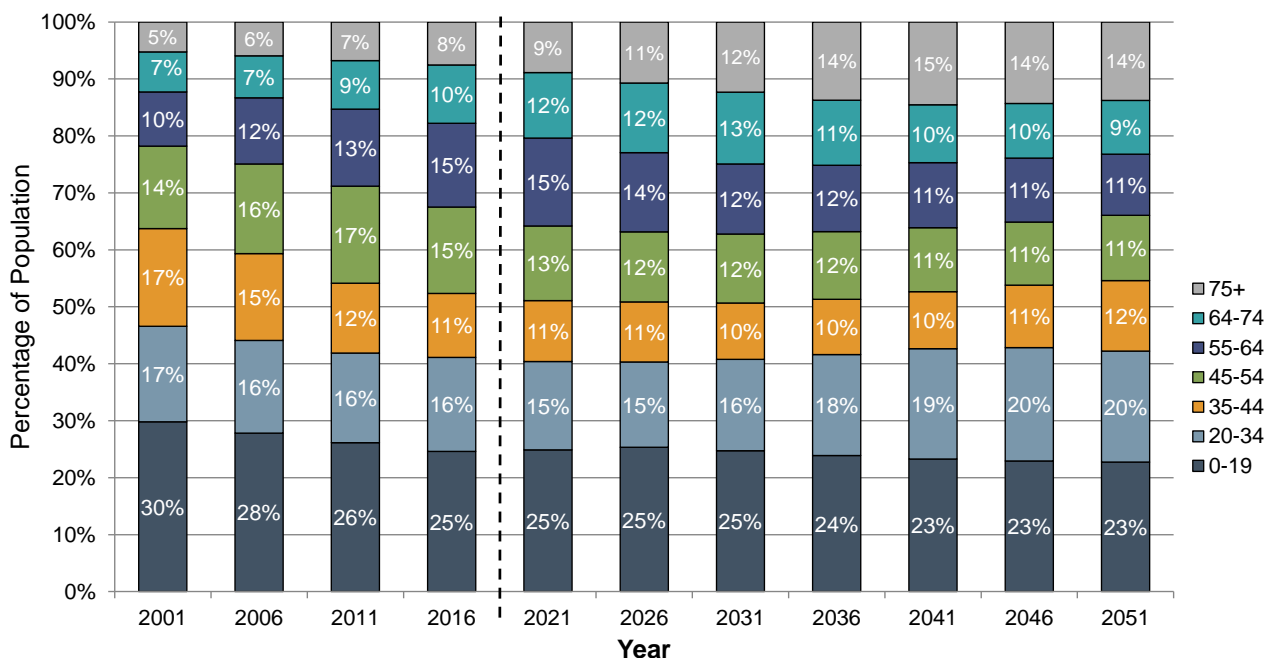
3.4.6 County of Wellington Total Population Growth by Major Age Group

Figure 3-23 summarizes the total population growth forecast for the County of Wellington by the percentage population by major age group. Additional details regarding the population forecast by age is provided in Appendix B. Key observations include:



- The percentage of the County of Wellington's youth (0-19) is forecast to gradually decline from 25% in 2016 to 23% in 2051;
- The 20-34 age cohort (young adults), which comprised 16% of the population in 2016, is forecast to increase in percentage share to 20% in 2051;
- The share of population in the 35-54 age group (adults) is forecast to decline from 26% to 23% over the same period;
- The percentage of empty nesters/younger seniors (age 55-74) is forecast to decline from 25% to 20%; and
- The percentage of population in the age 75+ age group (older seniors) is forecast to almost double from 8% in 2016 to 14% 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 3-23
County of Wellington
Total Population by Major Age Group, 2016 to 2051



Source: Population forecast by age derived from 2006 to 2016 Statistics Canada census by Watson & Associates Economists Ltd. 2016 to 2041 population forecast by age prepared by Watson & Associates Economists Ltd., 2019.
Note: Population includes net Census undercount of 3%.



3.4.7 Planning for Existing and Future Generations within the County of Wellington

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 Wellington. For most Canadian municipalities, including the County of Wellington, the influence of key demographic groups, including Generation Z, Millennials, and Baby Boomers, on the future of local real estate markets are particularly important to address. A brief summary of how these demographic groups are anticipated to shape future housing market demand across the County of Wellington is provided below.

3.4.7.1 Addressing the Future Housing Needs of Millennials and Generation Z

Millennials are typically defined as the segment of the population which 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 2020) 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 18% of the County of Wellington population¹, slightly higher than the Ontario provincial average of 17%. Millennials as of 2016 within the neighbouring G.G.H. municipalities (City of Guelph, City of Hamilton, Region of Waterloo, County of Dufferin and Region of Halton) represent 14% to 20% of their respective municipalities' population base.²

Home ownership is considered important for the majority of Millennials. A recent Royal LePage study found that nearly half of 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

¹ Statistics Canada, Census 2016, population by age.

² Ibid.



approximately half said 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 Wellington County, largely in Urban Centres, which provide options for first time homebuyers as well as “move-up” buyers with growing families. With this in mind, housing demand 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 market. 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 (15 to 27 years of age as of 2020) comprise Generation Z. As of 2016, this population represented 17% of the County’s population base, however at that time, this population base was primarily a youth population base (11 to 21 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 have a post-secondary certificate, diploma and degree compared to the previous

¹ Royal LePage, National Survey, 2013.



generation, Gen-X at approximately 55%.¹ This bodes well in accommodating labour within the knowledge-based economy, however has posed a challenge in accommodating employment in other sectors of the economy, including unskilled employment, as a greater share of the 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 Wellington. The extent to which the County of Wellington 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).

3.4.7.2 Continuing to Plan for Older Generations

As previously discussed, the average age of the population base in the County of Wellington 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. seniors 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 3.1%. Over the 2016 and 2051 period, the forecast population growth rate for the 75+ age group is forecast to increase to 3.3% 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 Wellington, it is also diverse with respect to age, income, health, mobility, and lifestyle/life stage.

When planning for the needs of older adults, it is important to consider these diverse physical and socio-economic characteristics relative to younger population age groups. On average, seniors, particularly those in the 75+ age group have less mobility, less

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.



disposable income and typically require increased health care compared to younger seniors (65-74 age group) and other segments of the younger working-age population. Typically, these characteristics associated with the 75+ age group drive their demand for relatively higher density housing forms (e.g. apartments and seniors' homes) that are in proximity to urban amenities (e.g. hospitals/health care facilities, amenities and other community services geared towards older seniors).

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 literature and commentary regarding the housing needs of older Canadians suggests that a large percentage of seniors will “age in place”; that is, to 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 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 include creating new housing through infill or intensification of established areas which can facilitate “aging in place” by providing housing options which allow seniors to remain in their communities when responding to life changes.

3.4.7.3 Components of Total Population Growth

Figure 3-24 and Figure 3-25 summarize population growth in the County of Wellington 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 Wellington. 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:



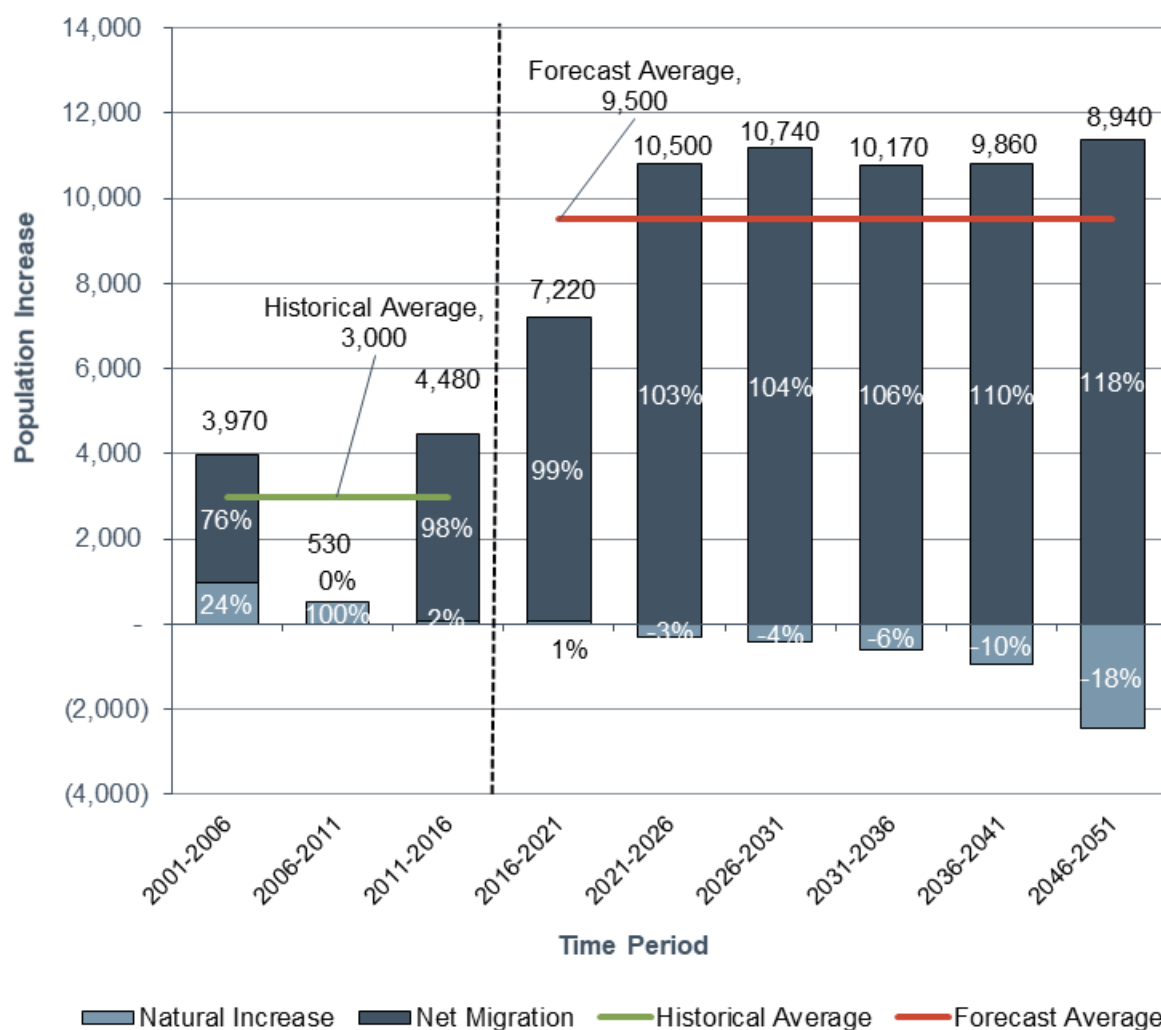
- **International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents. Over the last decade, this component of net migration is anticipated to represent a relatively small source of net migration for the County of Wellington;
- **Inter-provincial Net 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 Wellington; 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 Wellington.

Key observations with respect to the components of population growth in the County of Wellington include:

- Over the 2016 to 2051 period, population growth within the County of Wellington is anticipated to be driven from net migration;
- The County is forecast to accommodate just over 1,900 new net migrants per year (or 9,500 migrants every five years). Relative to historical trends, this represents a considerable increase in the average historical levels of net migration experienced between 2001 and 2016;
- As previously discussed, forecast net migration in the County of Wellington 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 all major age groups.



Figure 3-24
County of Wellington
Historical and Forecast Population Growth Associated with Net Migration and Natural Increase, 2016 to 2051



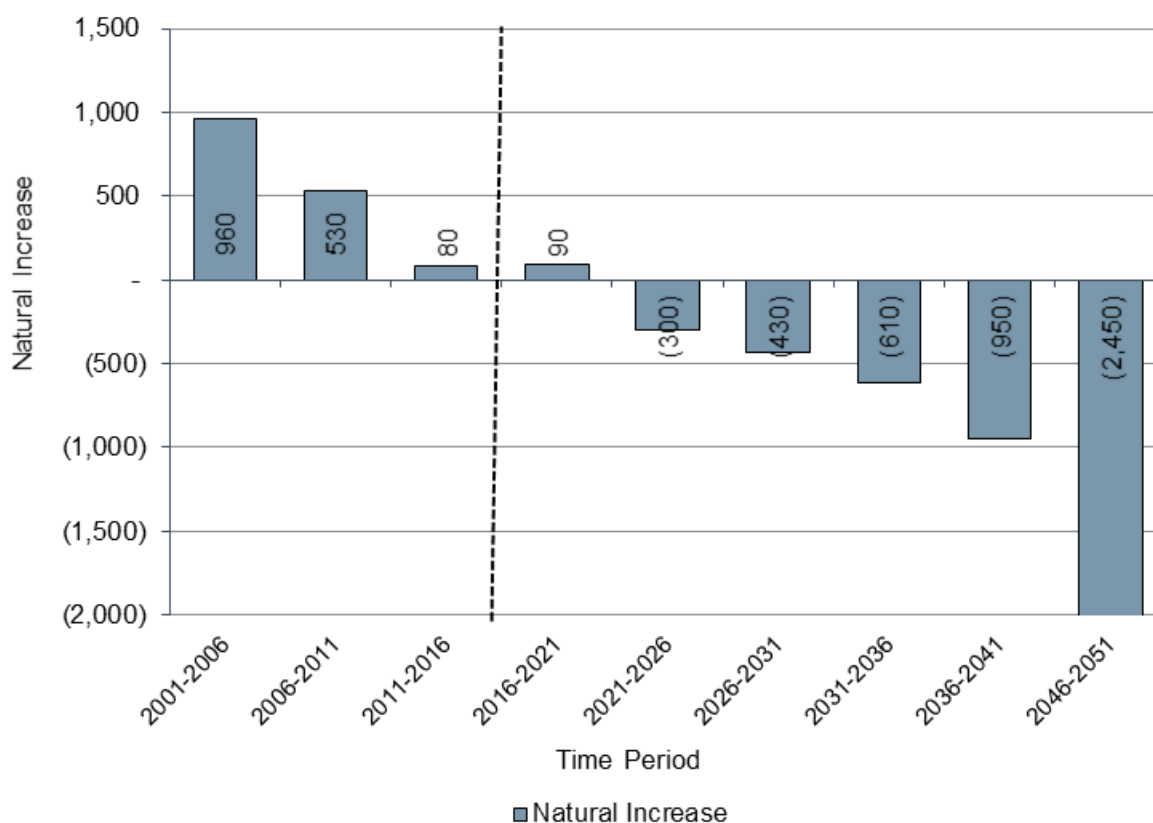
Source: Derived from Statistics Canada, Demography Division. 2001-2016 estimated by Watson & Associates Economists Ltd., 2019.
 Note: Includes Census undercount of approximately 3%.

Figure 3-24 summarizes forecast population growth associated with natural increase for the County of Wellington relative to historical trends, while Figure 3-25 summarizes forecast population growth associated with net migration for the County. As previously discussed, historical population growth (2001 to 2016) associated with natural increase has been relatively weak in the County of Wellington, 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 3-25
County of Wellington
Historical and Forecast Natural Increase, 2016 to 2051

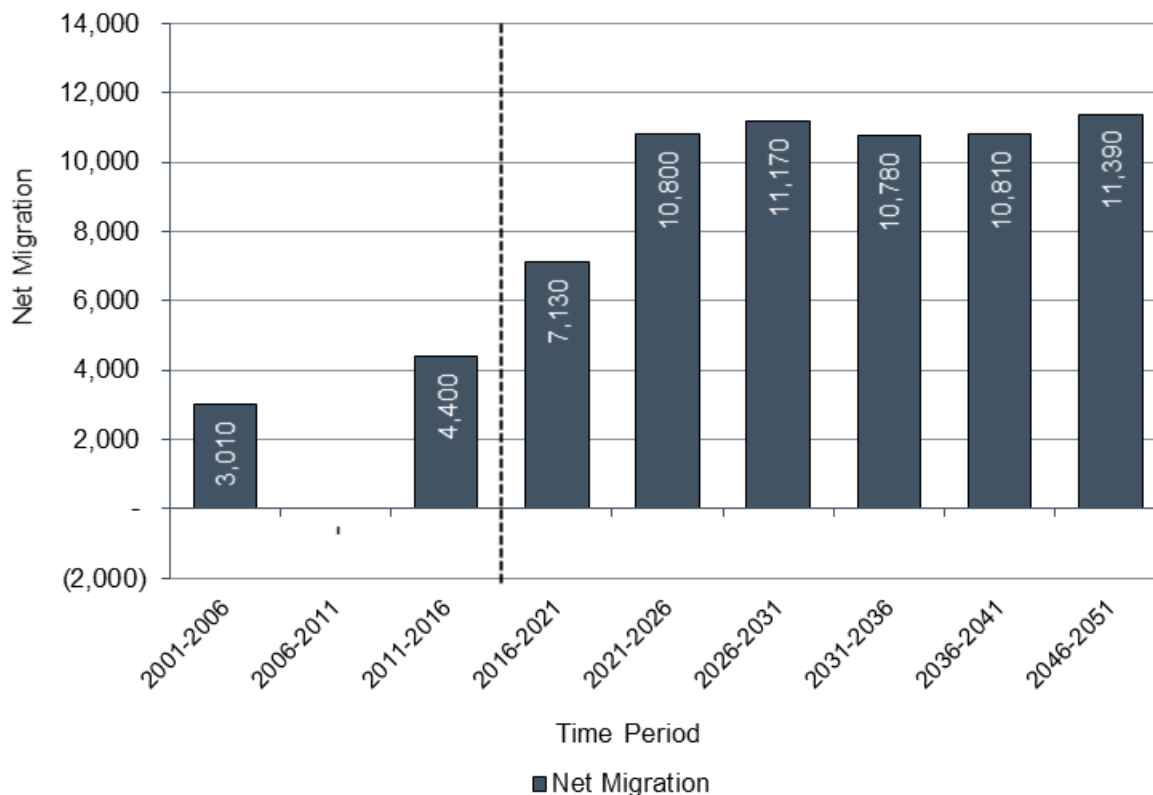


Source: Derived from Statistics Canada, Demography Division. 2001-2016 estimated by Watson & Associates Economists Ltd., 2019.
Note: Includes Census undercount of approximately 3%.

As summarized in Figure 3-26, 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 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 3-26
County of Wellington
Historical and Forecast Net Migration Increase, 2016 to 2051



Source: Derived from Statistics Canada, Demography Division. 2001-2016 estimated by Watson & Associates Economists Ltd., 2019.
Note: Includes Census undercount of approximately 3%.

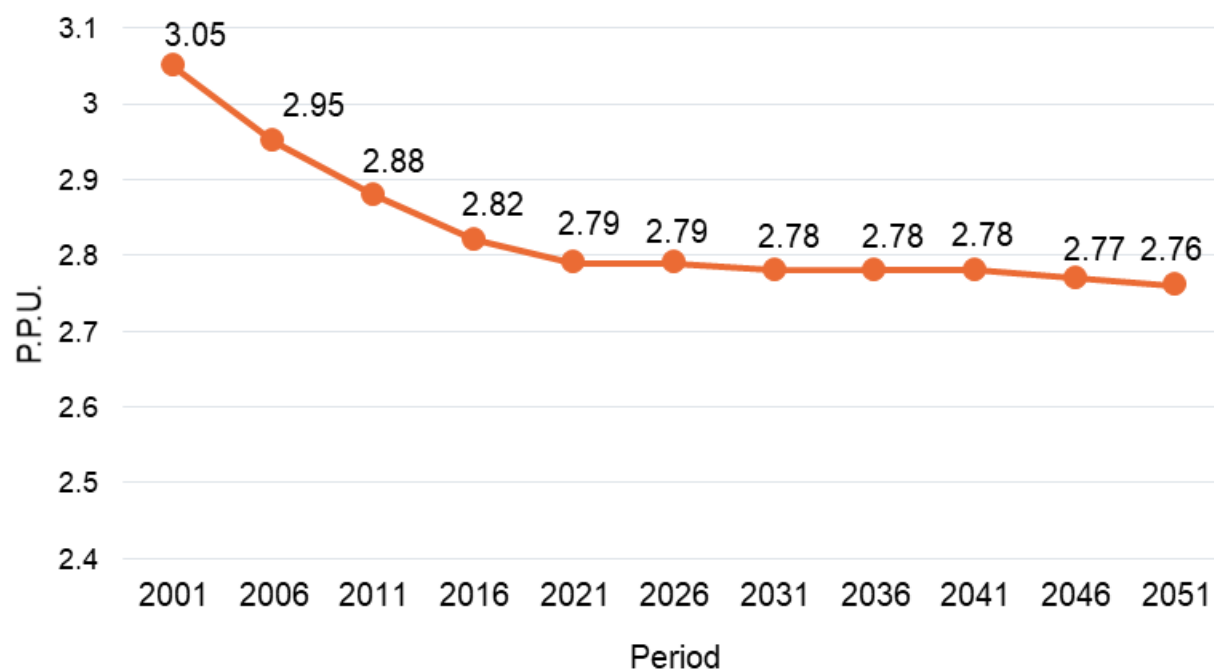
3.4.8 County of Wellington Housing Growth Forecast to 2051

3.4.8.1 Person Per Unit Forecast

Figure 3-27 summarizes anticipated long-term forecast average housing occupancy trends for the County of Wellington 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. Historically, average housing occupancy levels have been steadily declining in the County of Wellington. Over the forecast period, average household occupancy levels are expected to stabilize due to the significant increase in anticipated net migration associated with young adults and families.



Figure 3-27
County of Wellington
Historical and Forecast P.P.U., 2016 to 2051



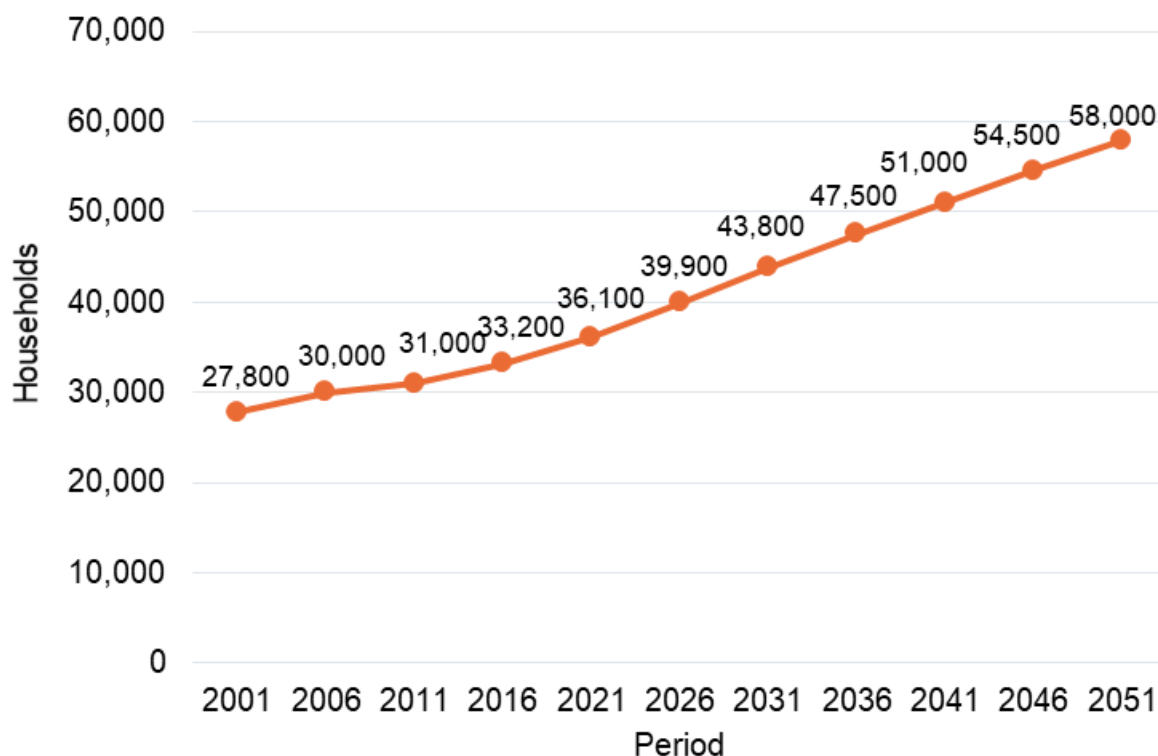
Source: 2001 to 2016 derived by Statistics Canada. 2021 to 2051 is a forecast by Watson & Associates Economists Ltd. Based on population with census undercount.

3.4.8.2 Household Forecast to 2051

Figure 3-28 summarizes the long-term total household forecast for the County of Wellington to 2051. As of 2016, the County's housing base was approximately 33,200 units. By 2051, the number of households in the County is anticipated to increase to approximately 57,900 total households. This represents an annual housing growth rate of approximately 1.6% 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 570 households per year between 2016 and 2021. Over the 2021 to 2051 forecast period, the County is forecast to average approximately 730 new housing units per year, which is just under 30% higher than the average level of new housing growth which is estimated the past five-years.



Figure 3-28
County of Wellington
Household Forecast, 2016 to 2051



Source: 2001 to 2016 derived from Statistics Canada. 2021 to 2051 is a forecast by Watson & Associates Economists Ltd.

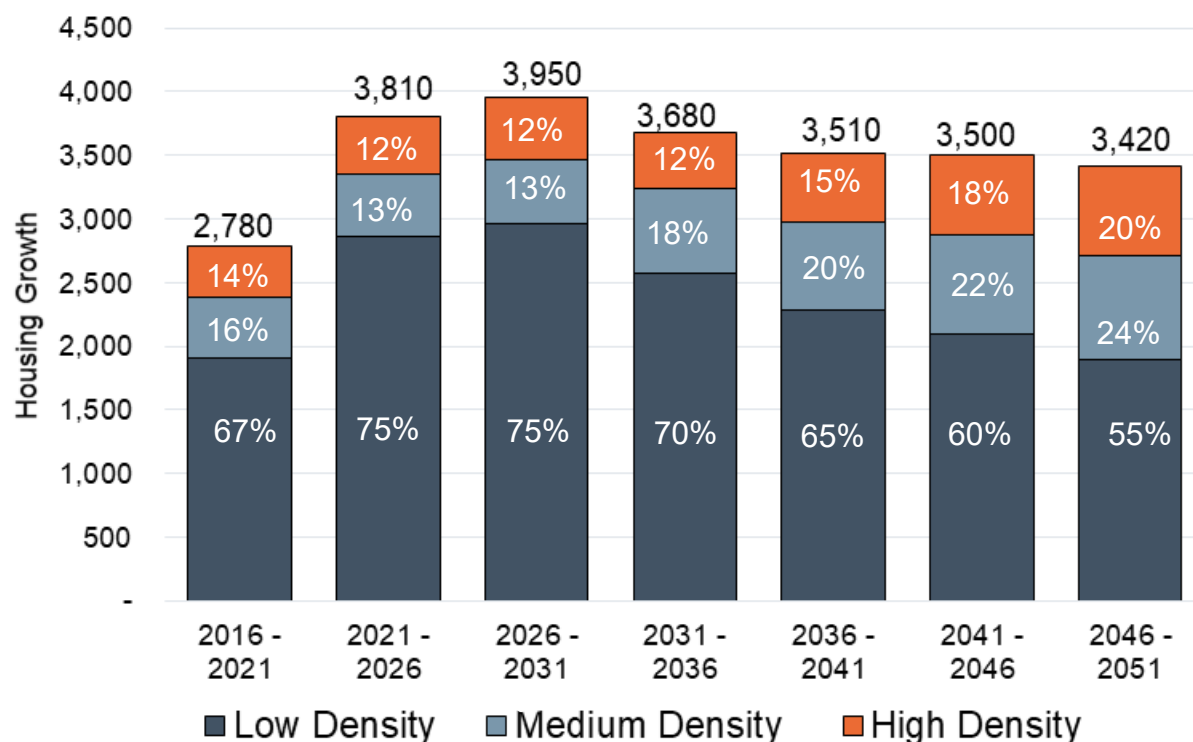
Figure 3-29 summarizes the long-term total household forecast for the County of Wellington in five-year increments from 2016 to 2051 and by housing type. It is anticipated that a large component of housing growth will include low-density housing development at 68%, followed by medium density at 18% and high density at 15%. 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. Figure 3-29 summarizes the County's incremental housing forecast by structure type from 2021 to 2051.



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 Wellington 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 County's attractiveness to older population segments.



Figure 3-29
County of Wellington
Household Forecast by Housing Type,
5-Year Growth Increment, 2016 to 2051



Source: Watson & Associates Economists Ltd.

Second unit potential is included in high-density housing category. The Phase 2 Report will include a forecast of second units as part of the intensification analysis.

3.5 Observations

It is recognized that future population and employment growth within the County of Wellington is strongly correlated with the growth outlook and competitiveness of the economy within the County of Wellington 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 western region of the G.G.H.



Outer Ring, Wellington County 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 Wellington total population base is forecast to grow to approximately 160,000 persons as per Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 66,400 residents between 2016 and 2051, or an average annual population growth rate of 1.5% during this time period. Accommodating forecast total population growth in the County of Wellington will require approximately 24,710 new households, or just over 710 new Census households annually over 2016 to 2051 (or 730 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 Wellington. As such, a higher long-term population forecast for the County of Wellington 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 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 3.3%. With an aging population the region 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 Wellington 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 Growth Allocations



4. Population and Housing Growth Allocations

This chapter provides a summary of the forecast population and housing allocations by Area Municipality within County of Wellington, as well as Urban Centres. Detailed tables on population and housing growth allocations are provided in Appendix E.

4.1 Introduction

4.1.1 Allocation Review

The population and housing allocations by Area Municipality 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 versus rural area.

Demand Factors:

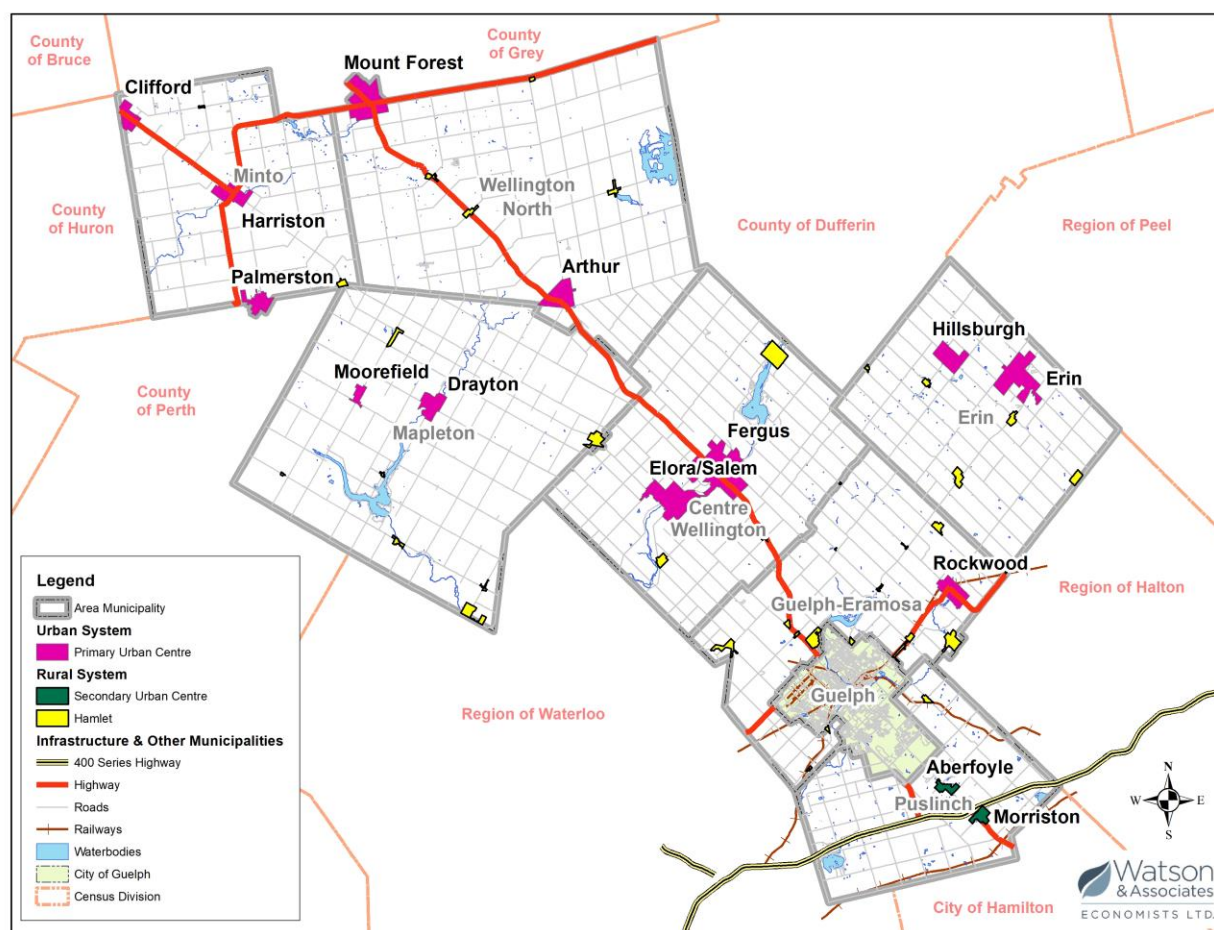
- Historical population and housing activity by structure type based on Statistics Canada (Census) data by Urban Centre and remaining rural area;
- A review of historical residential building permit activity (new units only) by structure type from 2009 to 2019 by Urban Centre and remaining rural area;
- 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 Area Municipalities and Urban Centres

Figure 4-1 provides a map of the seven Area Municipalities within the County of Wellington. Within each of the Area Municipalities, each of the Primary and Secondary Urban Centres and hamlet areas has been illustrated.

Figure 4-1
County of Wellington
Map of Area Municipalities and Settlement Areas



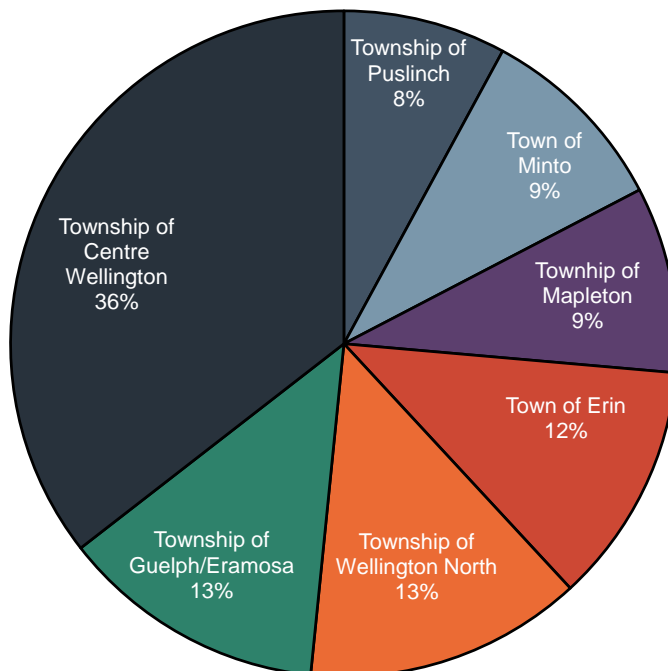
4.1.3 Existing Shares of Population Base by Area Municipality

As of 2021, the population base of the County of Wellington was estimated at 100,800. Of the County's 2021 population base, over a third (36%) of the County's population base is accommodated within the Township of Centre Wellington. Each of the remaining six Area Municipalities comprise between 8% to 13% of the County's



population base as of 2021. Further details on the population base for each Area Municipality is provided in Appendix E.

Figure 4-2
County of Wellington
Share of County's Population, 2021



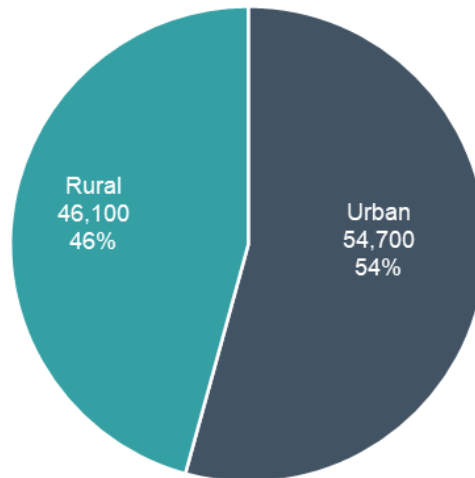
Source: Watson & Associates Economists Ltd.

4.1.4 Urban and Rural Population Estimates, 2021

As summarized in Figure 4-3, 54% of the County's population base is within the Urban System. Conversely, it is estimated that approximately 46% of the County's population base is within the Rural System which includes Secondary Urban Centres (Aberfoyle and Morriston), Hamlets and population within the remaining rural area.



Figure 4-3
County of Wellington
Rural and Urban Population, 2021



Source: Watson & Associates Economists Ltd.

4.2 Population Housing Growth Trends by Area Municipality

4.2.1 *Share of County of Wellington Population Growth, 1996 to 2016*

Figure 4-4 summarizes historical population growth within the County of Wellington by Area municipality over the Census periods between 1996 to 2016. Key observations include:

- The Township of Centre Wellington represented 43% of the County of Wellington's population growth. Growth within Centre Wellington was primarily concentrated in the urban centres of Elora and Fergus;
- The Township of Guelph/Eramosa comprised 17% of the County's population, growth during that period primarily concentrated within the Urban Centre of Rockwood;
- The Township of Puslinch and the Township of Mapleton each comprised approximately 13% of the County's population growth during this period; and
- The remaining Area Municipalities, Erin, Minto and Wellington North combined represented approximately 14% of the County's population growth. The low share of population growth within the Town of Erin has been largely due to



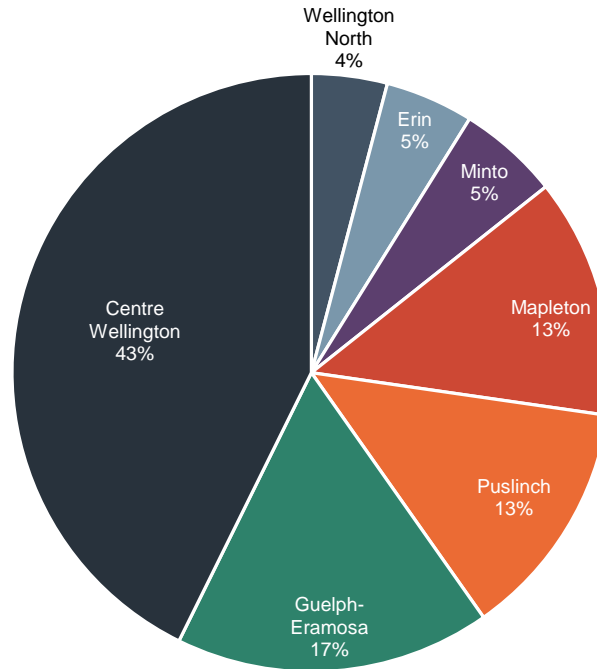
municipal servicing constraints. During this historical period, the Town of Erin experienced an annual population growth rate of 0.3%, compared to the County annual population growth rate of 0.9%.

With the exception of the Town of Erin, growth within the County over the past 20 years has largely been concentrated in Area Municipalities within the southern portion of the County. The Area Municipalities within the southern portion of the County include the Township of Centre Wellington, Town of Erin, Township of Puslinch and Township of Guelph-Eramosa. These Municipalities are in proximity to large employment markets within the G.G.H. and offer greater access to the G.T.H.A. The Area Municipalities within the southern portion of the County combined represented 77% of the County population growth and had an annual population growth rate of 1.1% during this period which is above the County-wide population growth rate of 0.9% during this period.

The Area Municipalities within the northern portion of the County include the Township of Wellington North, Town of Minto and Township of Mapleton. The Area Municipalities within the northern portion of the County combined represented 23% of the County population growth and had an annual population growth rate of 0.6% during this period which is below the County-wide population growth rate (0.9%).



Figure 4-4
County of Wellington
Share of 20-Year County Population Growth, 1996 to 2016



Source: Derived from Statistics Canada, Census 1996 to 2016 by
Watson & Associates Economists Ltd.

4.2.2 Census Households by Area Municipality, 1996 to 2016

Figures 4-5 and 4-6 summarizes historical housing growth trends in the County of Wellington by Area Municipality over the past 20 years by Census period. Over the most recent 20-year census period, the County of Wellington added 376 households annually, representing a household growth rate of 1.3% as summarized in Figure 4-5. Figure 4-6 provides a comparison of the average annual household growth rate over the 1996 to 2006 period and over the 2006 to 2016 period by Area Municipality.

As summarized in Figure 4-5, Centre Wellington comprised just under half (46%) of the County's household growth, largely fueled by growth within developing communities in the D.G.A. of Fergus. Centre Wellington's 20-year average annual household growth over this period was approximately 1.9% and as summarized in Figure 4-6 was even higher over the 1996 to 2006 period at 2.6% annually. Centre Wellington added 174 households annually over the 20-year period. Over the 1996 to 2006 period, the Township added 214 household annually.



The Township of Guelph-Eramosa had a household growth rate of 1.4% over the 20-year period. Guelph-Eramosa represented 15% of the new households added to the County over the 20-year and added approximately 56 units annually. The remaining Area Municipalities (Erin, Mapleton, Minto, Wellington North and Puslinch) added more modest levels of households annually to the County over the 20-year historical Census period.

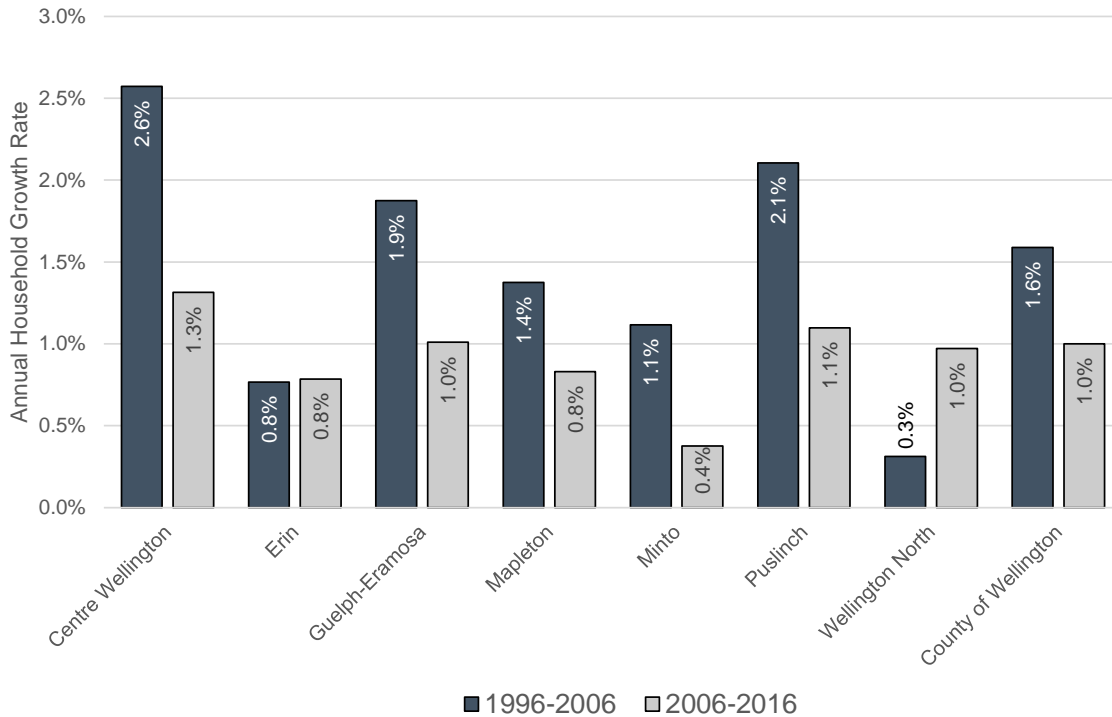
**Figure 4-5
Wellington County
Historical Census Household Growth by Area Municipality, 1996 to 2016**

Municipality	1996	2006	2016	1996-2016	20-Year Annual Units, 1996 to 2016	Share of County 20-Year Housing Growth	20-Year Annual Household Growth Rate (%)
Centre Wellington	7,400	9,540	10,870	3,470	174	46%	1.9%
Erin	3,530	3,810	4,120	590	30	8%	0.8%
Guelph-Eramosa	3,380	4,070	4,500	1,120	56	15%	1.4%
Mapleton	2,530	2,900	3,150	620	31	8%	1.1%
Minto	2,810	3,140	3,260	450	23	6%	0.7%
Puslinch	1,900	2,340	2,610	710	36	9%	1.6%
Wellington North	4,110	4,240	4,670	560	28	7%	0.6%
County of Wellington	25,660	30,040	33,180	7,520	376	100%	1.3%

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



Figure 4-6
Wellington County
Annual Census Household Growth Rates by Area Municipality
1996 to 2006 and 2006 to 2016



Source: Derived from Statistics Canada Census, 1996 to 2016 by Watson & Associates Economists Ltd.

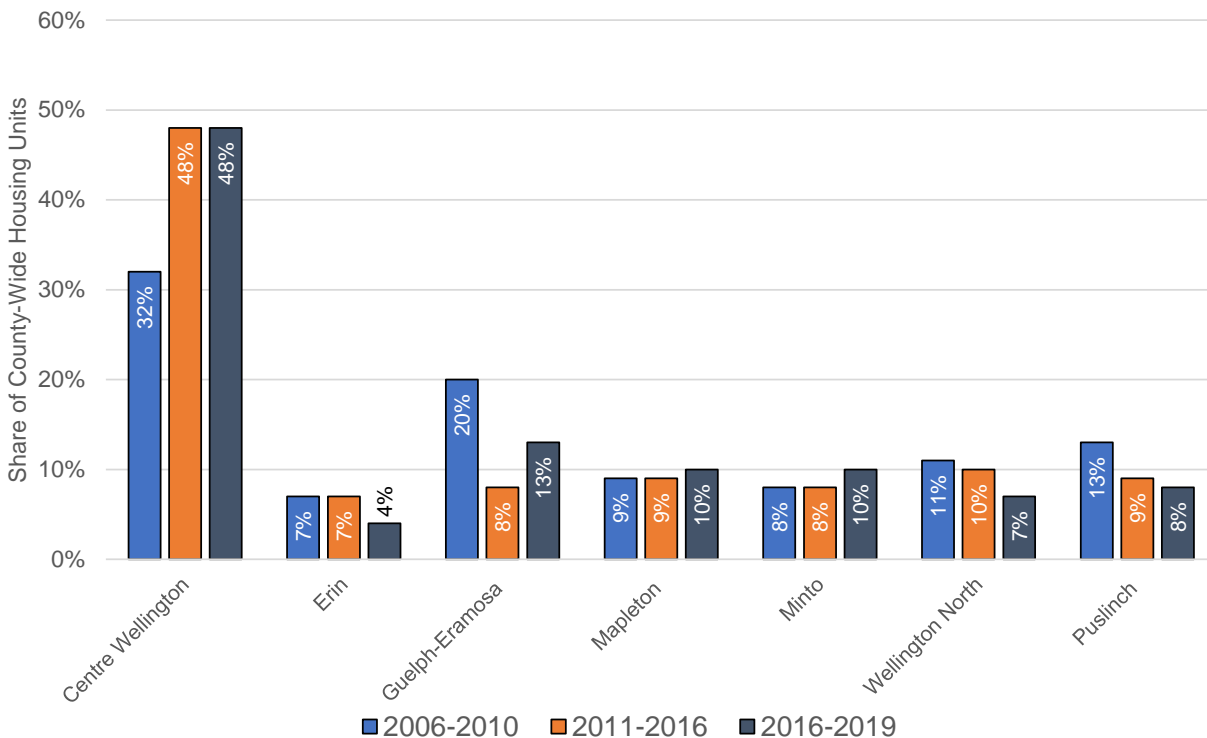
4.2.3 *Share of County Residential Development Activity by Area Municipality, 2009 to 2019*

As previously discussed in Chapter 3, residential building permits (new units only) issued within the County over the past decade (2009 to 2019) contributed to the construction of just under 350 new residential dwellings annually. As summarized in Figure 4-7, nearly half (48%) of the building permit issued between 2006 and 2019 have occurred within the Township of Centre Wellington. Guelph-Eramosa represented the second largest share of new building permitted issued units at 13% over the last few years (2016 to 2019). The majority of the new permits issued within Guelph-Eramosa were for housing developments within the Rockwood Urban Centre. Each of the remaining Area Municipalities represented 10% or less of the County's residential building permit issued units over the past few years (2016 to 2019).



Over the forecast horizon, it is anticipated that the Town of Erin will increase its share of housing activity within the County, through an expansion the expansion of existing municipal water and and construction of a planned wastewater treatment plant.¹ It is anticipated that the Township of Guelph-Eramosa will represent a lower share of the County's housing construction activity given servicing capacity limitations within the Rockwood Urban Centre. Housing activity within Centre Wellington is anticipated to continue to represent a large share of the housing activity.

Figure 4-7
County of Wellington
Residential Building Permit Activity by Area Municipality
New Units Only, 2006 to 2019



Source: Derived from County of Wellington GIS Residential Inventory by Watson & Associates Economists Ltd.

¹ Based on review of the Town of Erin municipal servicing capacity reports prepared by Ainley & Associates Limited.



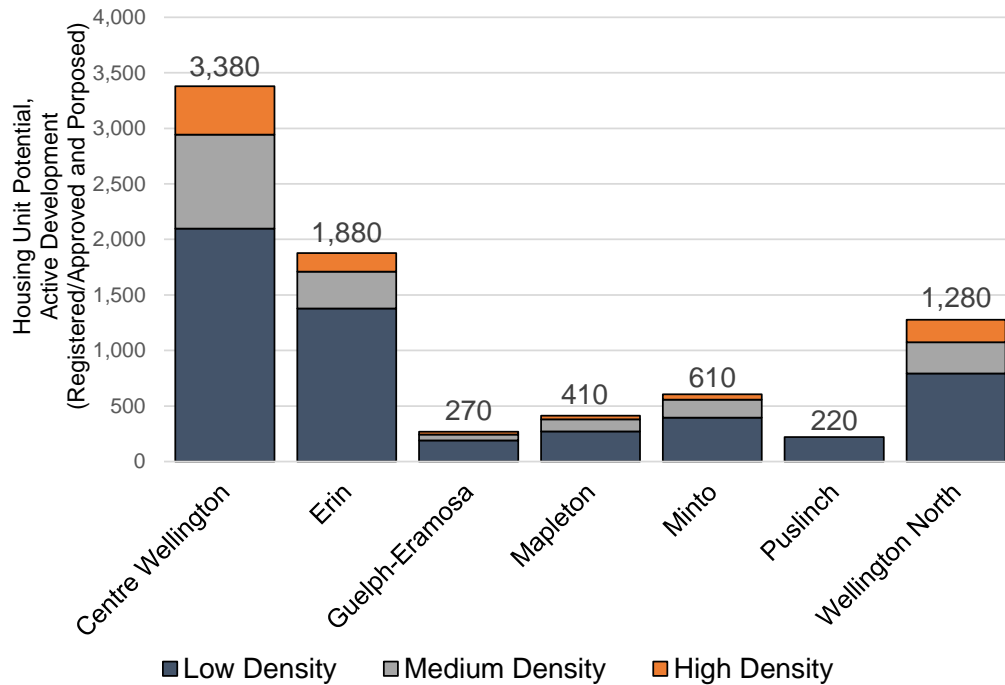
4.2.4 Residential Housing Potential on Vacant Lands by Area Municipality

The County's active residential development application data was reviewed to provide insight into the demand for residential housing units by Area Municipality.

Figures 4-8a and 4-8b provides a summary of the potential housing units on vacant lands with approved and proposed development applications. It is estimated that approved applications (registered unbuilt/draft approved) have the potential to accommodate 5,800 housing units, the majority of those developments are concentrated in Centre Wellington followed by Wellington North. It is estimated that proposed developments have the potential to accommodate an additional 2,200 units, the majority of those units are concentrated in the Town of Erin, followed by Centre Wellington. Overall, Centre Wellington represents 43% of the housing unit potential with respect to active developments in the planning approvals process, followed by the Town of Erin at 23% and Wellington North at 16%. The remaining Area Municipalities represent 19% of the housing potential in active development applications.



Figure 4-8a
County of Wellington
Housing Potential on Vacant Lands
Registered Unbuilt/Draft Approved and Applications Under Review
by Area Municipality, As of Mid-2019



Source: Derived from County of Wellington GIS Residential Inventory by Watson & Associates Economists Ltd. Data is as of Mid-2019.



**Figure 4-8b
County of Wellington
Housing Potential on Vacant Lands
Registered Unbuilt/Draft Approved and Applications Under Review
by Area Municipality, As of Mid-2019**

Area Municipality	Low Density	Medium Density	High Density	Total Units	Low Density	Medium Density	High Density	Total Units	Low Density	Medium Density	High Density	Total Units	%
	Registered Unbuilt/Draft Approved				Application Under Review (Proposed)				Total Active Development Applications				
Centre Wellington	1,907	785	244	2,934	190	62	191	443	2,097	847	435	3,377	42%
Erin	243	19	10	272	1,134	314	156	1,604	1,377	333	166	1,876	23%
Guelph-Eramosa	157	0	0	157	34	51	26	111	191	51	26	268	3%
Mapleton	271	108	34	413	0	0	0	0	271	108	34	413	5%
Minto	394	139	50	583	0	23	0	23	394	162	50	606	8%
Puslinch	220	0	0	220	0	0	0	0	220	0	0	220	3%
Wellington North	775	272	180	1,226	18	8	24	50	793	280	204	1,276	16%
County of Wellington	3,967	1,323	518	5,808	1,376	458	397	2,231	5,343	1,781	915	8,039	100%
Housing Mix (%)	68%	23%	9%	100%	62%	21%	18%	100%	66%	22%	11%	100%	

Source: Derived from County of Wellington GIS Residential Inventory by Watson & Associates Economists Ltd.

In addition to an active development pipeline of approximately 8,040 potential housing units within the County, there is the potential for an additional 6,300 housing units on vacant lands within no active applications, as summarized in Figure 4-9. In total, the County of Wellington has the potential to accommodate 14,340 housing units on designated lands.



Figure 4-9
County of Wellington
Housing Potential on Vacant Lands, No Active Applications
by Area Municipality, As of Mid-2019

Area Municipality	Low Density	Medium Density	High Density	Total Units	%
	Vacant Lands with no Application				
Centre Wellington	1,333	313	212	1,859	29%
Erin	1,429	420	173	2,022	32%
Guelph-Eramosa	117	0	0	117	2%
Mapleton	520	124	57	701	11%
Minto	545	110	41	696	11%
Puslinch	186	0	0	186	3%
Wellington North	465	200	57	722	11%
County of Wellington	4,595	1,167	540	6,302	100%

Source: Derived from County of Wellington GIS Residential Inventory by Watson & Associates Economists Ltd.

4.3 Population and Housing Growth Allocations, 2016 to 2051

4.3.1 Population and Housing Growth Allocations by Area Municipality, 2016 to 2051

Figures 4-10 through to 4-15 provides a summary of the population and housing forecast to 2051 by Area Municipality. Further details are provided in Appendix E. While population and employment growth rates vary significantly by geographic area, each of the Area Municipalities share a number of relatively common attributes with respect to long-term residential development and demographic trends. These include:

- All Area Municipalities 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 five years for all Urban Centres which are not constrained by land or water/wastewater servicing requirements;
- Future housing growth will be dominated by low-density housing forms; however, increasing market opportunities will exist for medium-density and high-density housing as the regional and provincial population base continues to age; and
- P.P.U. levels are forecast to experience a slight decline over the forecast horizon. In addition to demographic trends, both the rate and type of Census families and Census non-families will have a significant influence on projected P.P.U. levels.

As identified above, various factors were considered in allocating population and housing growth by Urban Centre and remaining rural area. In addition to the above considerations, a number of assumptions were made with respect to the residential growth potential of each Urban Centre within the County, based on discussions with County and the County of Wellington M.C.R. technical working group (Technical Resource Team).

Key observations on the housing and population growth allocation have been organized by Area Municipality. As previously mentioned, further details on the population and housing by Area Municipality is provided in Appendix E which includes details on the housing by structure type, existing population and housing base and forecast to 2051.

Centre Wellington

- Centre Wellington's existing population base as of 2021 comprises of 81% of the population within the Urban System and 19% of the population in the Rural System. Centre Wellington's population base compared to the other Area Municipalities is more oriented towards the County's Urban System.
- As summarized in Figure 4-11, Centre Wellington is anticipated to accommodate a nearly half (45%) of the population County population over the forecast horizon. This is consistent with population and housing trends observed.
- Centre Wellington is anticipated to grow at 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 20-year Census period (2006 to 2016) annual growth rate of 1.3% annually.



- As summarized in Figure 4-13, Centre Wellington is anticipated to add 11,540 additional housing units over the 2016 to 2051 period, representing approximately 330 units annually, which is almost double the annual housing added over the 2006 and 2016 period (as previously summarized in Figure 4-5, the annual households added over the 2006 to 2016 period was 174 units).
- It is anticipated that Centre Wellington 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 4-15. This is consistent with upcoming development in the Township's active development pipeline (registered/unbuilt and proposed), as previously discussed.
- The majority of future development in Centre Wellington is anticipated to be accommodated within the Fergus and Elora/Salem Urban Centres, as will be discussed later in this chapter.

Erin

- Erin's existing population base as of 2021 comprises of 64% of the population within the Urban System and 36% of the population in the Rural System.
- As summarized in Figure 4-11, Erin is anticipated to accommodate nearly a quarter (22%) of the population County's population growth over the forecast horizon.
- Population growth within Erin is anticipated to be significantly higher than historical trends given anticipated investments and expansions in municipal water and wastewater servicing in Erin Village and Hillsburgh. As summarized in Figure 4-12, Erin is anticipated to achieve a higher rate of population growth (2.3% annually) compared to other Area Municipalities. As a comparison, the annual population growth rate in Erin over the 2006 to 2016 was approximately 0.8% annually.
- As summarized in Figure 4-13, Erin is anticipated to add 5,090 additional housing units over the 2016 to 2051 period, approximately 145 units annually which is significantly higher than the housing units added over the 2006 to 2016 period of approximately 30 units annually.
- The majority of future urban development in the Town of Erin is anticipated to be accommodated within the Erin Village and Hillsburgh Urban Centres, as will be discussed later in this chapter.



Guelph-Eramosa

- The existing (2021) population of Guelph-Eramosa base comprises of 38% of the population within the Urban System and 62% of the population in the Rural System.
- As summarized in Figure 4-11, Guelph-Eramosa is anticipated to accommodate a small share (2%) of the population County's population growth over the forecast horizon. It is important to recognize that almost a third of the population growth during this period in Guelph-Eramosa has already occurred over the last five years (2016 to 2021).
- Post-2021, it is anticipated that growth within Guelph-Eramosa will slow due to limitations regarding municipal servicing within the Urban Centre of Rockwood.
- As a result of these limitations for future growth within the Urban Centre of Rockwood, the annual population growth rate of Guelph-Eramosa is anticipated to increase at a rate of 0.3%, which is lower than the growth rate observed over the most recent 20-year census period of 1.1% annually.
- Due to growth constraints within the Urban Centre of Rockwood, a large portion of future development in Guelph-Eramosa is anticipated to occur outside of Rockwood and in rural settlements.

Puslinch

- The existing (2021) population base of Puslinch existing is entirely accommodated within the Rural System with 10% of the population base concentrated within the two Secondary Urban Centres (Morrison and Aberfoyle). As previously notes, these Secondary Urban Centres serve as important community service hubs to the Township.
- As summarized in Figure 4-11, Puslinch is anticipated to accommodate a small share (4%) of the County's population growth over the forecast horizon since Puslinch lacks Primary Urban Centres which offer full municipal servicing (water/ wastewater servicing).
- The annual population growth rate of Puslinch is anticipated to grow at annual population growth rate of 0.8% which is lower than the growth rate observed over the most recent 20-year Census period of 1.5% annually.



- As summarized in Figure 4-13, it is anticipated that Puslinch will add 840 housing or 24 units annually over the forecast horizon which is lower than the annual housing growth over the most recent 20-year census period of 36 units annually.
- Given the limited opportunities within the Secondary Urban Centres of Aberfoyle and Morriston, a large portion of the growth within Puslinch will be accommodated through severances in the rural area.

Wellington North

- The existing (2021) population base of Wellington North comprises of 65% of the population within the Urban System and 35% of the population in the Rural System.
- As summarized in Figure 4-11, Wellington North is anticipated to accommodate 12% of the population County's population growth over the forecast horizon.
- The annual population growth rate of Wellington North is anticipated to grow at annual population growth rate of 1.5% which is significantly higher than the growth rate observed over the most recent 20-year Census period of 0.3% annually.
- As summarized in Figure 4-13, it is anticipated that Wellington North will add 3,000 housing units or 86 units annually over the forecast horizon, which is more than double the annual housing growth over the most recent 20-year census period of 28 units annually.
- As previously summarized (Figure 4-8a) Wellington North has a large supply of potential units (1,280 potential housing units) in the active residential development pipeline (approved and proposed) which suggests that the Townships has sufficient urban lands to accommodate the near-term population and housing.
- It is anticipated that the majority of future development within Wellington North will be accommodated in the Urban Centres of Arthur and Mount Forest, as will be discussed later in this Chapter.

Minto

- Minto's existing population base as of 2021 comprises of 66% of the population within the Urban System and 34% of the population in the Rural System.
- As summarized in Figure 4-11, Minto is anticipated to accommodate a 10% of the population County's population growth over the forecast horizon.



- The annual population growth rate of Minto is anticipated to grow at annual population growth rate of 1.5% which is significantly higher than the growth rate observed over the most recent 20-year Census period of 0.5% annually.
- As summarized in Figure 4-13, it is anticipated that Minto will add 2,210 housing units or 63 units annually over the forecast horizon, which is close to three times the annual amount of housing growth experienced over the most recent 20-year Census period (23 housing units annually).
- As previously summarized, Minto has experienced an increase in the share of County-wide residential building permit activity (new units only) over the past few years compared to previous periods.
- It is anticipated that the majority of the future urban development within Minto will be accommodate within the Urban Centre of Palmerston and to a lesser extent the Urban Centres of Harriston and Clifford, as will be discussed later in this chapter.

Mapleton

- The existing (2021) population base of Mapleton is comprises 26% of the population within the Urban System and 74% of the population in the Rural System. Compared to the other Area Municipalities, Mapleton's existing population base is more oriented towards the Rural System.
- As summarized in Figure 4-11, Minto is anticipated to accommodate a small share (5%) of the population County's population growth over the forecast horizon.
- The annual population growth rate of Mapleton is anticipated to grow at annual population growth rate of 0.8% which is slightly lower the growth rate observed over the most recent 20-year Census period of 1.0% annually.
- It is important to recognize that Mapleton has accommodated a large share of recent housing activity within the rural area, approximately 46% of its housing activity over the 2006 to 2019 period.¹ Going forward, and consistent with provincial policy direction, the County is directing future growth to its Primary Urban Centres.
- As summarized in Figure 4-13, it is anticipated that Mapleton will add 1,400 housing or 40 units annually over the forecast horizon which is well above

¹ As determined through recent residential building permit activity (new units only).



annual housing growth levels experienced over the most recent 20-year Census period (31 units annually).

- As previously summarized, Mapleton has maintained its share of County-wide residential building permit activity (new units only) over the past decade.
- It is anticipated that future urban development in Mapleton will be accommodated within the Urban Centre of Drayton and to a lesser extent the Urban Centre of Moorefield, as will be discussed later in this chapter.

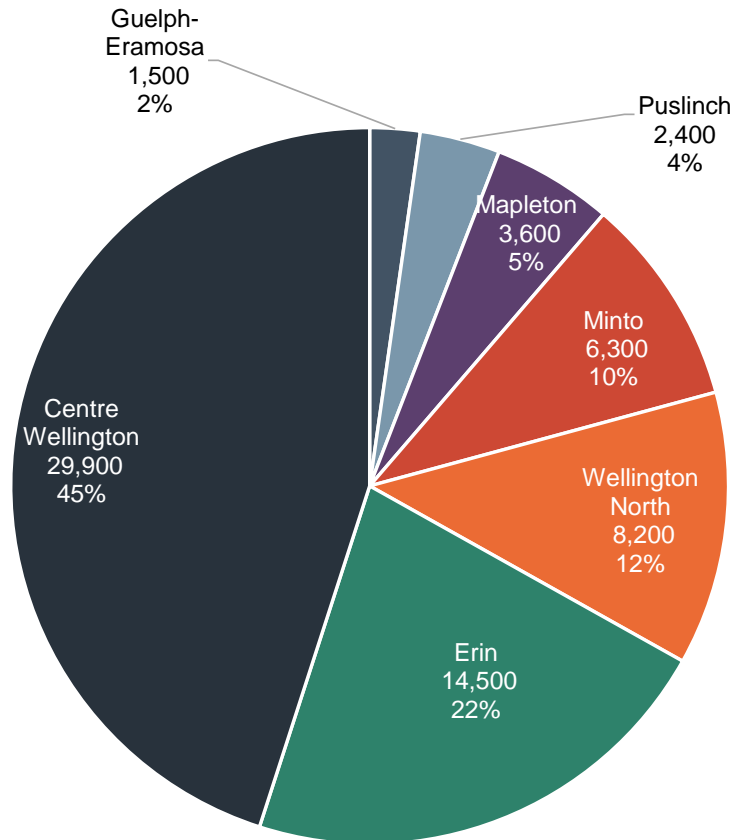
**Figure 4-10
County of Wellington
Population Forecast by Area Municipality**

Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	29,000	11,800	13,200	10,800	8,900	12,300	7,600	93,600
2051	58,900	26,300	14,700	14,400	15,200	20,500	10,000	160,000
Population Growth								
2016 - 2051	29,900	14,500	1,500	3,600	6,300	8,200	2,400	66,400

May not add up precisely due to rounding.
Source: Watson & Associates Economists Ltd.



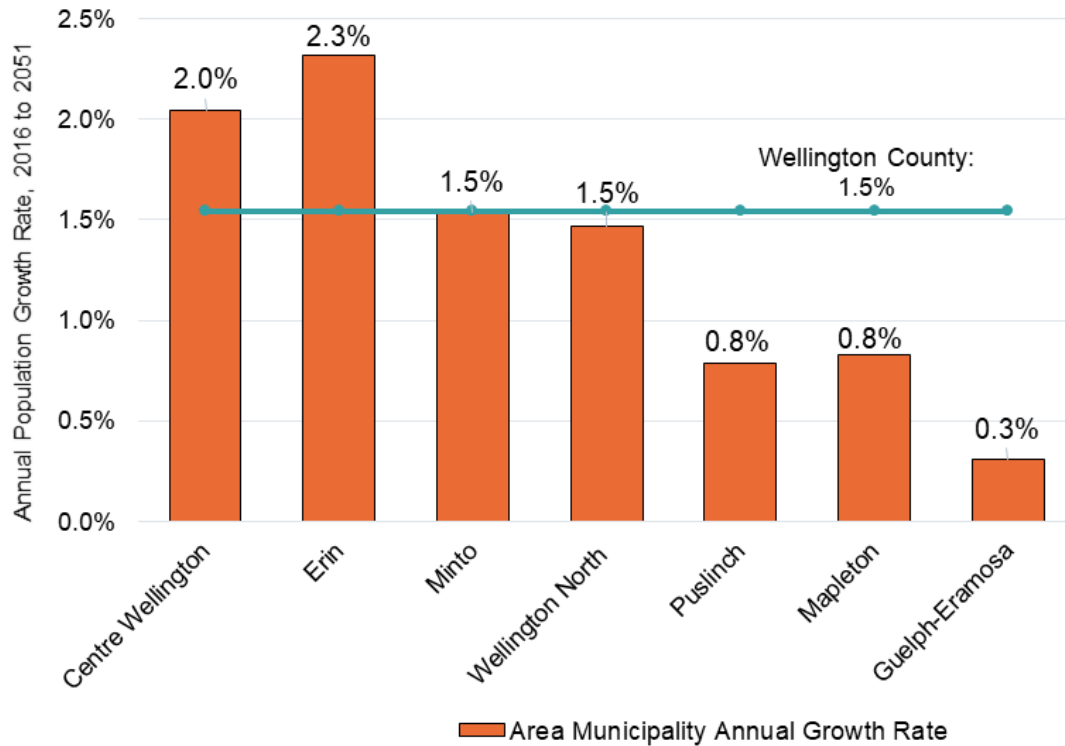
Figure 4-11
County of Wellington
Population Growth Allocation, 2016 to 2051
By Area Municipality



Source: Watson & Associates Economists Ltd.



Figure 4-12
County of Wellington
Annual Population Growth Rate, 2016 to 2051
By Area Municipality



Source: Watson & Associates Economists Ltd.

Figure 4-13
County of Wellington
Housing Forecast by Area Municipality

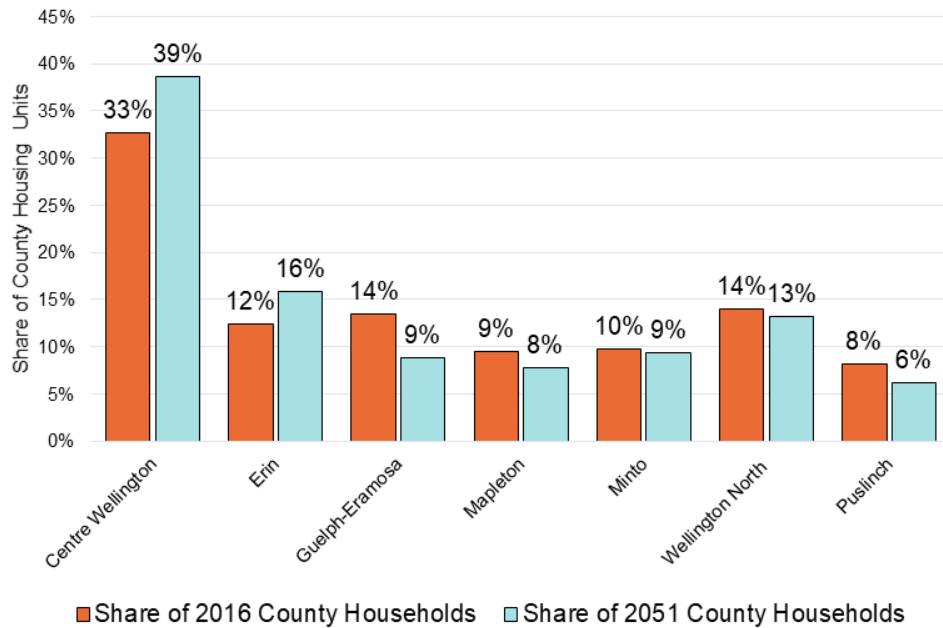
Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	10,870	4,110	4,490	3,140	3,250	4,660	2,700	33,220
2051	22,410	9,200	5,110	4,540	5,460	7,660	3,550	57,930
Housing Growth								
2016 - 2051	11,540	5,090	620	1,400	2,210	3,000	850	24,710

Note: Above figure includes "other" dwellings of approximately 540 units.

Source: Watson & Associates Economists Ltd.



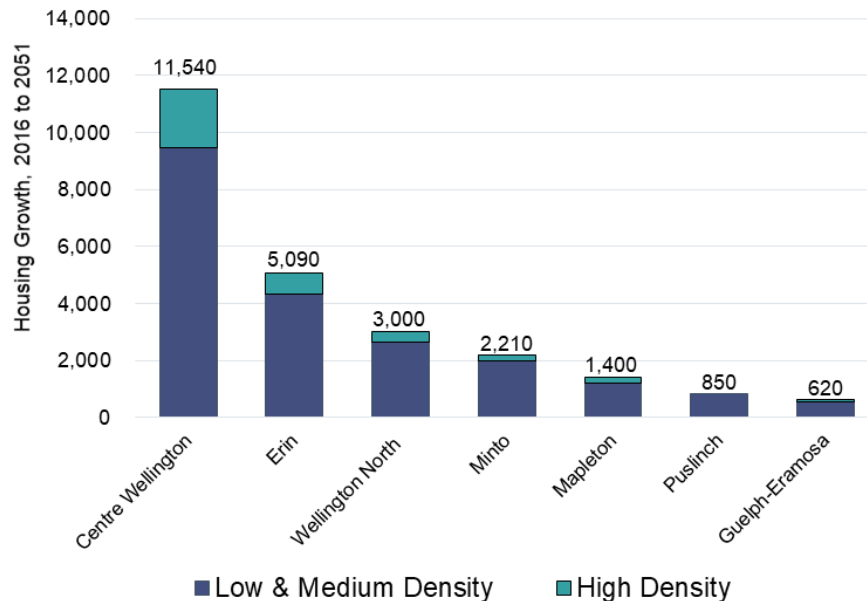
Figure 4-14
County of Wellington
Share of County Housing Units in 2016 and 2051
By Area Municipality



Source: Watson & Associates Economists Ltd.



Figure 4-15
Wellington County
Housing Growth by Area Municipality, 2016 to 2051



Source: Watson & Associates Economists Ltd.

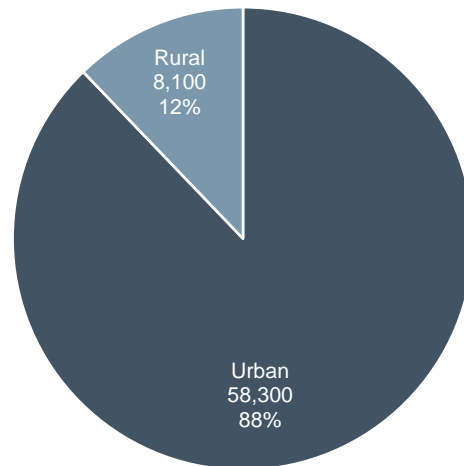
4.3.2 Population and Housing Growth Allocations by Urban Centre and Remaining Rural Area, 2016 to 2051

4.3.2.1 Growth Allocation to County's Urban System and Rural System

As previously discussed, most of the County's population and housing growth is directed to Primary Urban Centres with full municipal servicing. As summarized in Figure 4-16, 88% of population growth is anticipated to be accommodated within the County's Urban System and 12% of population growth is to be accommodated within the County's Rural System. It is anticipated that the County will shift more towards a population increasingly concentrated within the Urban System, increasing the County's Urban System population base share of 51% in 2016 to 66% by 2051.



Figure 4-16
Wellington County
Population Growth by Urban and Rural Area,
2016 to 2051



Source: Watson & Associates Economists Ltd.

4.3.2.2 Urban Centre Growth Forecasts to 2051

Urban Centre population and housing forecasts have been prepared for each Primary and Secondary Urban Centre in the County. Details are provided in Appendix E. It is important to note that the growth forecasts by Urban Centre are to be used as guidance for planning purposes at the local municipal level. Area Municipalities may elect to make further refinements within their Urban System to reflect changes in local conditions and servicing.

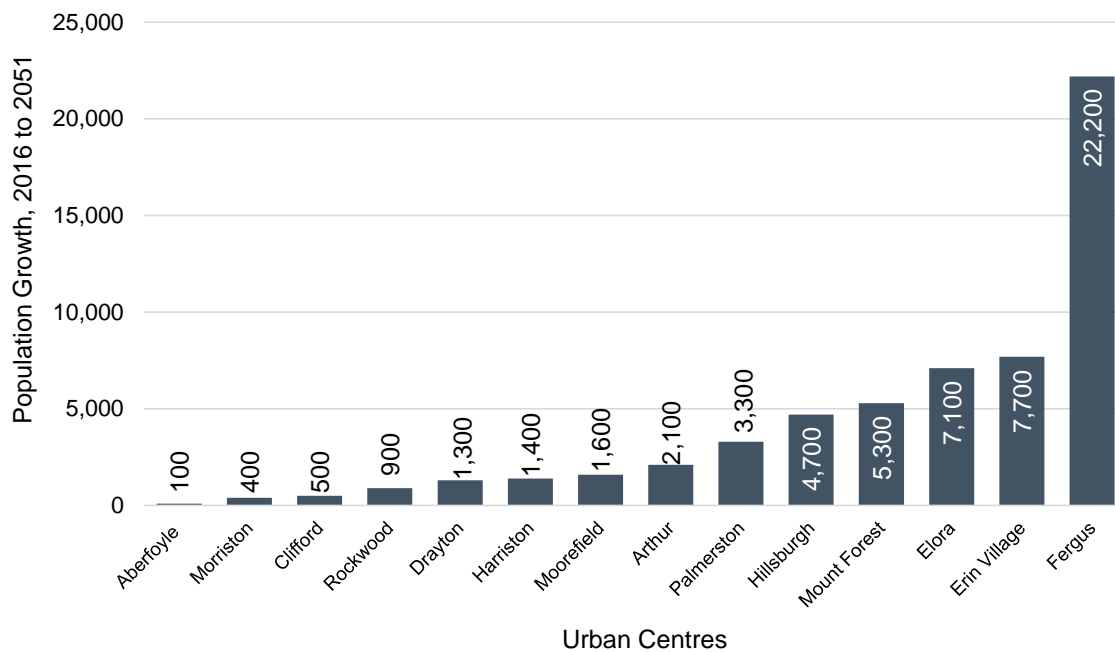
Figure 4-17 summarizes the population growth forecast of the Primary and Secondary Urban Centres over the 2016 and 2051 horizon, while Figure 4-18 provides the annual population growth rates by Primary and Secondary Urban Centre in the County. Key observations include:

- Fergus is anticipated to accommodate a population growth increment of 22,200 persons or 630 persons annually. The population growth of Fergus represents one third of the County's population growth over the forecast horizon and an annual population growth rate of 2.7%.
- Elora is anticipated to accommodate a population growth increment of 7,100 or 200 persons annually. The annual population growth rate is forecast at 2.0%.



- Erin Village and Hillsburgh are anticipated to accommodate an additional 7,700 and 4,700 persons, respectively. The annual population growth rates of Hillsburgh and Erin Village are the highest amongst the County's Primary Urban Centres at 4.3% and 3.7%, respectively.
- Mount Forest and Palmerston are anticipated to accommodate the largest share of population growth within the northern portion of the County, accommodating on annual basis, 150 and 90 persons, respectively.
- The Urban Centres of Drayton, Harriston, Moorefield and Arthur are anticipated to each accommodate between 40 to 50 persons annually over the forecast horizon.
- The Urban Centres of Aberfoyle, Morriston, Clifford and Rockwood are anticipated to accommodate a modest share of the County's population growth relative to the other Urban Centres over the long-term planning horizon.

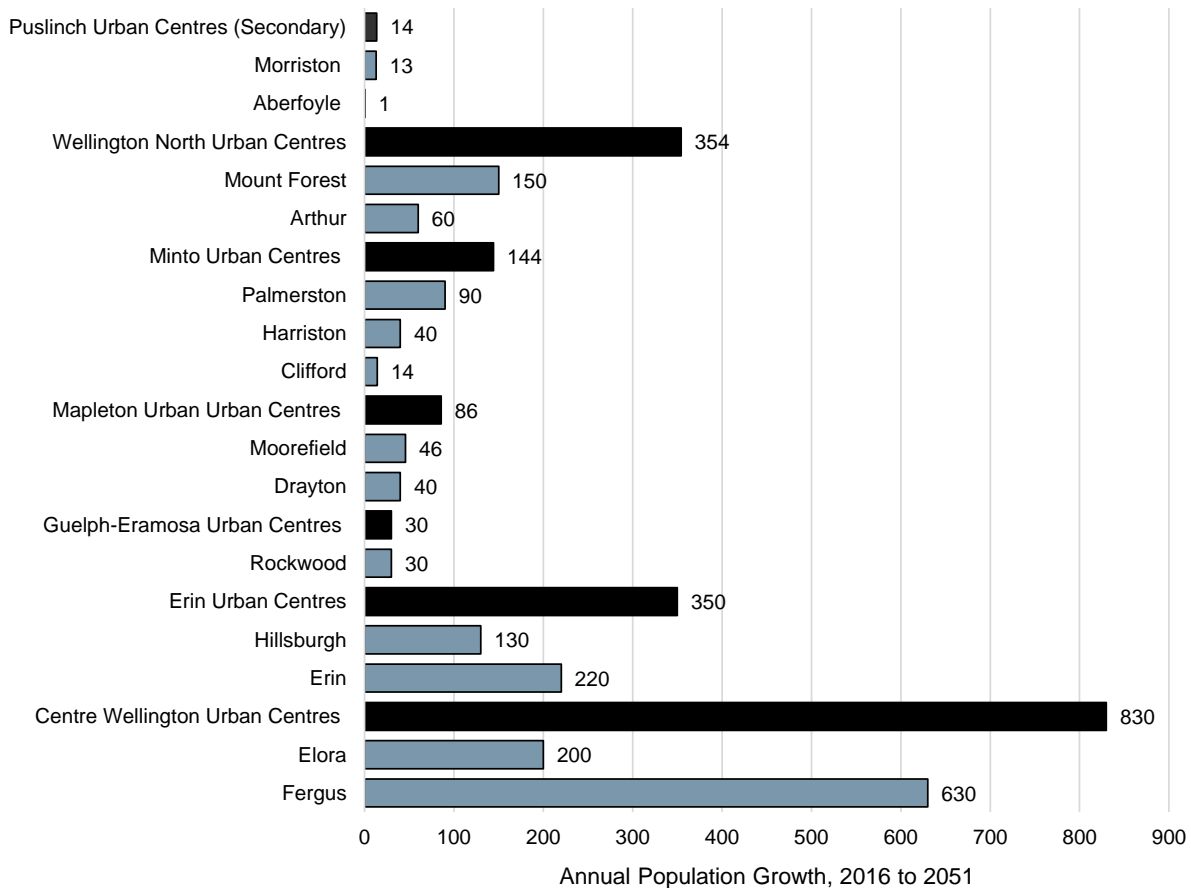
Figure 4-17
Wellington County
Population Growth by Urban Centre, 2016 to 2051



Source: Watson & Associates Economists Ltd.



Figure 4-18
Wellington County
Annual Population Growth by Urban Centre, 2016 to 2051



4.4 Observations

Over the forecast horizon it is anticipated that all Area Municipalities will continue to experience strong population and housing growth. As discussed in Chapter 3, it is anticipated that the outward growth pressure from the G.T.H.A. to the Outer Ring will continue over the forecast horizon. The Township of Centre Wellington and the Town of Erin Area, located in the southern portion of the County, are anticipated to accommodate a large portion of County's population growth over the long-term planning horizon. The Township of Centre Wellington is anticipated to accommodate just under half of the County's population growth (45%), while the Town of Erin is anticipated to accommodate just under a quarter of the County's population growth (22%).



With limited or no opportunities to accommodate residential growth on full municipal services (water and wastewater servicing), the Township of Guelph-Eramosa and the Township of Puslinch are anticipated to accommodate a lower share of population and housing growth relative to historical trends. Further, it is anticipated that Guelph-Eramosa and Puslinch will accommodate a large share of the County's rural population and housing growth.

The municipalities in the northern portion of the County, including Mapleton, Minto and Wellington North are anticipated to accommodate 23% of the County's population growth. While potential urban land supply is currently designated within some of these northern municipalities to accommodate additional urban development, there are perceived limits from a real estate market perspective regarding the level of sustained urban development that these municipalities can accommodate over the long-term.

Over the forecast horizon, it is anticipated that the County will become increasingly more urban. As of 2016, approximately 51% of the County's population is within the Urban System, while 49% of the County's population is within the Rural System. Looking forward, it is anticipated that by 2051, approximately 66% of the County's population based will be concentrated within the Urban System which includes 12 Primary Urban Centres. It is anticipated that the Urban System within the County will accommodate an additional 58,300 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 47,600). Phase 2 of the M.C.R. related to growth management and urban lands will explore requirements to accommodate future urban growth within the existing settlement boundaries of the Urban Centres.

As previously discussed, net migration is anticipated to be a major driver of population growth for the County. Urban Centres with good access to the larger G.G.H. employment markets, such as Fergus, Elora and Erin Village are anticipated to accommodate a large portion of the County's population growth. It is anticipated that these Urban Centres will also play a role in broadening the housing options available within the County with respect to housing structure type. Other Urban Centres are anticipated to accommodate more moderate levels of future population growth as these Urban Centres are also important community hubs for the County. All Urban Centres which do not have identified municipal servicing constraints are anticipated to continue



to accommodate urban development at higher levels than historically experienced in recent decades.



Chapter 5

Employment Growth Analysis



5. Employment Growth Analysis

This chapter provides an assessment of historical and forecast employment growth trends for the County of Wellington 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 that are anticipated to impact employment and shape the development patterns of Commercial and Employment Areas of the County's Urban Centres. 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). Details on employment forecast allocation by Area Municipality is provided in Chapter 6. Employment Land needs will be discussed in the M.C.R. Phase 2 Report.

5.1 Introduction

5.1.1 *Employment Categories*

The long-term employment forecast prepared herein includes a breakdown of employment by category, including population-related employment (P.R.E.), employment lands employment (E.L.E.) and 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. employment. The County's commercial and institutional sector employment is generally accommodated in commercial and institutional-type buildings, referred to as P.R.E. employment. Given the importance and relative magnitude of E.L.E. employment within the County's rural areas, this report further breaks down E.L.E., as Urban E.L.E. (employment within Primary Urban Centres) and Rural E.L.E. (employment outside Primary Urban Centres)

The following is a summary of the employment categories in accordance with the provincial L.N.A.

5.1.1.1 *Population-Related Employment (P.R.E.)*

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 (less than 2%) of the County's E.L.E. employment. Work at home employment is also captured as P.R.E. within the County of Wellington. P.R.E. is located within the County's urban centres and rural settlements and is largely accommodated in the central business districts, commercial arterial corridors, neighbourhood plazas, institutional campuses and schools, and standalone institutional and retail buildings.

5.1.1.2 Urban Employment Lands Employment (E.L.E.)

Urban E.L.E. represents jobs accommodated in industrial-type buildings within Primary Urban 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.

5.1.1.3 Rural Employment Lands Employment (E.L.E.)

Rural E.L.E. represents jobs accommodated in industrial-type buildings outside of Primary Urban 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 predominately comprised of industrial sector employment, with a negligible portion of commercial and institutional employment accommodated in rural industrial-type buildings, referred to as Rural E.L.E.

5.1.2 Employment Geographic Categories

The forecast to 2051 includes a further breakdown of employment with respect to the employment by geographic location.

5.1.2.1 Urban System

Within the County's Urban System, employment is grouped into two broad categories, Urban Employment Areas and Urban Community Areas. The Urban System accommodates 63% of the County's employment base. The categories by geographic location are provided below:



Urban Employment Areas

Urban Employment Areas include predominately E.L.E., employment in industrial-type buildings. Urban Employment Areas are clusters of industrial and export-based activities and identified in the County O.P. as lands designated as Industrial. 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. 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 County of Wellington O.P. permits specific large commercial uses that are compatible with other uses in the Urban Employment Areas, including automotive and truck repair, heavy equipment rental or sales branch and wholesale outlets.¹ Office uses are also permitted in the County's Urban Employment Area subject to the zoning by-law.² While office uses are permitted in the County's Urban Employment Areas, office uses represent a very small share (less than 2%) of the employment base in the County's Employment Areas.

Typically, Urban Employment Areas include employment supportive uses that serve the Urban Employment Area, such as restaurants, gas stations, convention centres, hotels and fitness centres. According to the County O.P., only retail and food services (e.g. cafeteria) uses are permitted if an accessory to the use (subject to zoning bylaw).³ While Urban Employment Areas in the County of Wellington do not permit a wide-range of employment supportive uses, a large portion of the County's Employment Areas are adjacent to the lands designated Highway Commercial which offer a wide range of commercial services. With a few exceptions, lands with direct access to arterials in the County's Urban Centres are generally designated as Highway Commercial or for other Community Area uses. Urban Employment Areas comprise 17% of the County's employment base as of 2021.

Urban Community Area

Urban Community Area includes all other lands not a part of the Urban Employment Area. Non-residential uses in the Urban Community Area include those that serve the local trading area of the Urban Centre, as well as visitors to the Urban Centres. All the

¹ County of Wellington Official Plan, Policy 8.7.3., p. 87.

² Ibid.

³ Ibid.



Urban Centres in the County have a Central Business District, a key focal point of the community. The Central Business District represents the largest cluster of commerce activity in the Urban Centre. In addition, most of the Urban Centres have a cluster of commercial development on lands designed as Highway Commercial. Generally, the largest retail uses are located on lands designated as Highway Commercial. Urban Community Areas represents the largest share of the County's employment base at approximately 44% as of 2021.

5.1.2.2 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 37% of the County's employment as of 2021. The categories by geographic location are provided below.

Rural Employment Area

Rural Employment Areas include predominately E.L.E., employment in industrial-type buildings on lands with no municipal services (i.e. outside the Primary Urban Centres). Rural Employment Areas are clusters of industrial and export-based activities and identified in the County O.P. as lands designated as Rural Employment Areas. Rural Employment Areas represent an important component of the County's employment base, representing 12% of the County's employment as of 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 Hamlets and a small base of industrial, commercial and institutional uses in the countryside. Other Rural Employment comprises approximately 25% of the County's employment base as of 2021.

5.2 Macro-Trends, Disruptors and Employment Outlook

The following section provides an overview of the macro-trends that are anticipated to influence employment over the long term. This review is provided to provide insight with



respect to the County's long-term employment land needs in accordance with employment growth anticipated for the County to the year 2051.

5.2.1 Global Economic Trends and International Trade

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 coronavirus disease (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. Furthermore, 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. 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 as 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

¹ Global Government Forum. OECD Warns of Uneven Economic Recovery from COVID-19, Despite Global Growth. June 1, 2021.



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 United States (U.S.), real G.D.P. (gross domestic product) was estimated to contract by 3.4% in 2020 and is expected to rebound by 5.1% in 2021.¹ 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.

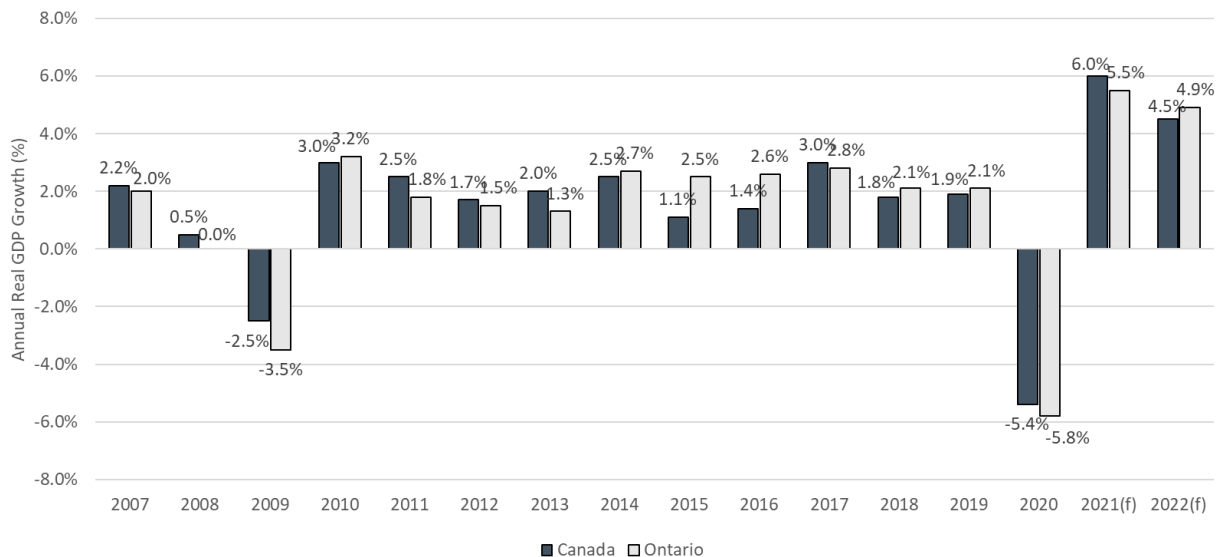
5.2.1.1 Provincial Context

Over the past decade, the Canadian and Ontario economies have experienced relatively strong economic growth, as illustrated in Figure 5-1. 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 that are important to recognize. As illustrated in Figure 5-1, the Ontario economy is estimated to have contracted by 5.8% in 2020; 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 World Economic Outlook. International Monetary Fund. January 2021.



Figure 5-1
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 seen 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 5-2, a range of commercial, institutional and industrial sectors have experienced an increase 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 and professional, scientific and technical services. A number of knowledge-based sectors including information and cultural industries; and educational services have seen a notable increase in G.D.P. Within the industrial sector, transportation and warehousing, construction and manufacturing have experienced notable increases in G.D.P.



Figure 5-2
Ontario
Change in Provincial G.D.P. by Sector, 2009 to 2019



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 Wellington is its geographic location within Ontario. The County of Wellington is located within the G.G.H., one of the fastest growing regions in North America. In many respects, Wellington County's long-term population and employment growth potential is largely tied to the success of the G.G.H. as a whole.

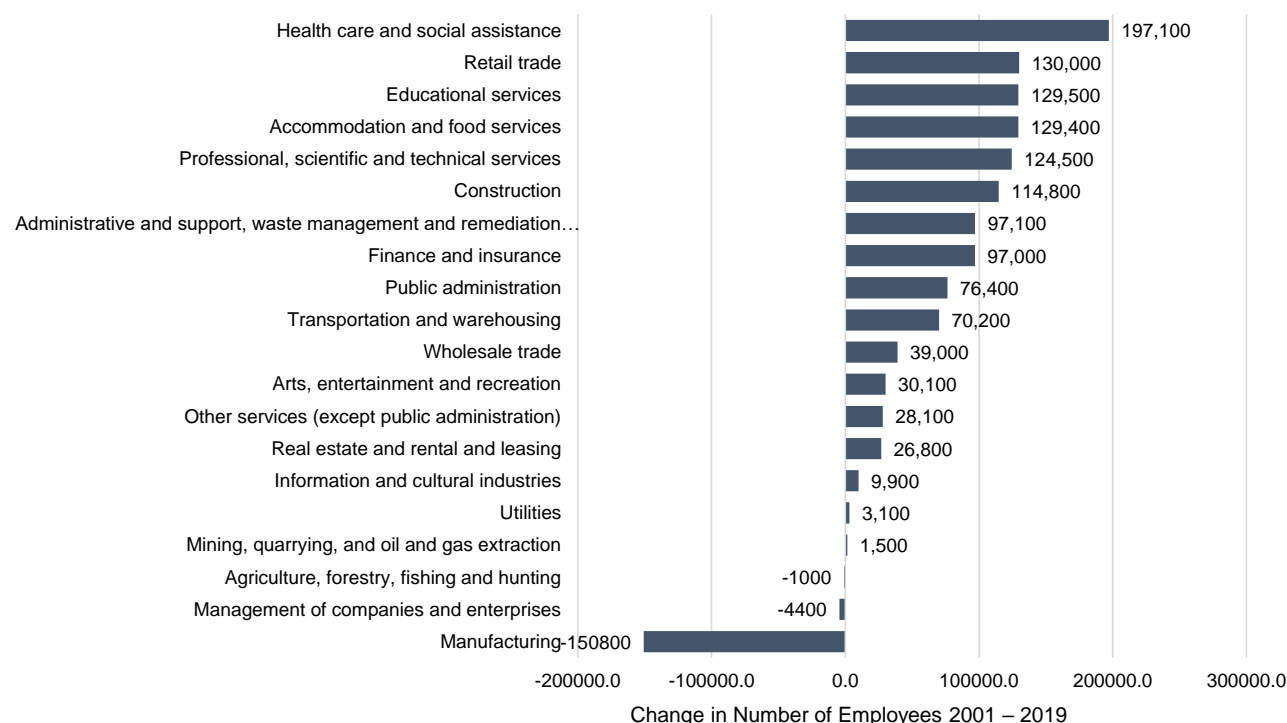
5.2.1.2 G.G.H. Trends

As summarized in Figure 5-3, total employment has grown by 35% within the G.G.H. from 2001 to 2019. 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, however, it is noted 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, education, accommodation and food services, and retail trade.

Figure 5-3
G.G.H.
Change in Employment, 2001 to 2019



5.2.2 Outlook for Employment

Continued structural changes in the global economy and technological advancements will require municipalities to be increasingly responsive and adaptive to changing industry needs and disruptive economic forces. The following provides an overview of key industry and labour force trends that are expected to influence growth and development patterns in the County of Wellington over the coming decades.



5.2.2.1 E-Commerce as a Major Disruptor for the Retail and Logistics

E-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade. The rise of e-commerce has reduced the demand for retail square footage, in particular retail space for the sale of goods-based retailers.¹

Increasing growth in e-commerce is also having a significant impact on employment growth and land demand related to the logistics sector. Delivery expectations within this sector are increasing on an annual basis. As delivery times decrease, it is anticipated that demand for regional fulfilment centres will increase. Further, it is estimated that 25% to 30% of online merchandise is returned which is also driving the need for reverse logistics and return centres.

5.2.2.2 Potential Impacts of Technology on Commercial Services

Digital and mobile technologies are making it easier to access goods and services on-demand which has led to alternative platforms to purchase products and services. Among these platforms are those that support the sharing economy which provide opportunities for individuals to earn an income by leveraging under-utilized assets. These platforms are providing customers with an alternative to traditional buy/selling platforms, including those in the hospitality (e.g. hotels and taxis) and in office leasing (office sharing). Other alternative purchasing platforms are providing income earning opportunities for individuals to perform services or tasks that are typically not outsourced by households (e.g. assembling furniture, small household repairs, picking up food at fast food restaurants, meal preparation, grocery pick-up and delivery). It is anticipated that further advancements in the sharing economy will have increasingly negative impacts on the need for non-residential building space and continued growth in precarious employment.

5.2.2.3 Trends in Industrial Processing

As previously mentioned, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario and the County of Wellington, the nature of traditional industrial

¹ Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores, home improvement stores and stores selling general merchandise, apparel and furniture.



processes is rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented.

Emerging export-based subsectors have siting, space and built-form requirements that are significantly different from traditional manufacturing. This may include integrated operations combining office, research and development, warehousing and logistics, and on-site manufacturing in a campus-style setting. Anticipating and responding to the evolving needs of industry will be necessary for the County to better position itself for sustained growth, particularly in the advanced manufacturing sector and other emerging knowledge-based industries.

5.2.2.4 Trends in Work at Home and No Fixed Place of Work Employment

In 2006, 70% percent of the County of Wellington labour force base was defined as having a usual place of work, while the remaining 30% was categorized as work at home (W.A.H.) or having N.F.P.O.W. (i.e. off-site employment). In 2016, the percentage of the County of Wellington labour force defined as having a usual place of work was 80%.¹ As of 2021, it is estimated that usual place of work employment represents 75% of the County's employment base, while the remaining 25% of the employment includes W.A.H. employment and N.F.P.O.W.² The decrease in usual place of work employment compared to 2016 is largely due to steady growth in both W.A.H. and N.F.P.O.W. employment, which is anticipated to remain strong over the forecast, as discussed in further below.

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." Within the County of Wellington, the rising share of labour related to N.F.P.O.W. has been primarily driven by steady growth in the transportation and construction sectors which are typically characterized as having a higher percentage of off-site employees. Technological innovation and improved broadband regional telecommunications have been, and will continue to be, a key driver of economic

¹ Statistics Canada, Place of Work Employment, 2006 and 2016.

² Based on estimated by Watson & Associates Economists Ltd.



expansion in knowledge-based sectors as well as the steady rise of the gig economy. Looking forward, continued advances in technology and telecommunications (e.g. 5G technology) is anticipated to further enable remote work patterns and ultimately increase the relative share of off-site employees over the long term. Over the coming decades, W.A.H. and N.F.P.O.W. employment in the County of Wellington is expected to steadily increase as a result of these trends. Demographics and socio-economics also play a role in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in the County of Wellington, particularly younger adults as well as older adults (i.e. Baby Boomers) approaching retirement or semi-retirement will utilize technology to allow them to supplement their income in more flexible ways in contrast to traditional work patterns.

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 in play prior to the pandemic. The impact of COVID-19 has required employees and employers with a usual place of work to transition and adapt to a work at home environment as lockdown provisions occurred. In addition to the broader theme of increasing full-time work at home and partial work from home trends, office-related work from home trends have been significantly accelerated by COVID-19. As such, enterprises 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 term. In light of these anticipated trends, it is important that long-term employment and non-residential land needs forecasts adequately consider the manner in which these impacts are likely to impact the nature of employment and associated building space needs by type as well as by place of work.

5.3 Planning for Employment Sectors

As previously mentioned, structural changes in the economy are changing the character of economic activities in Employment Areas and impacting their built form and character. Recognizing these recent structural changes in the regional economy, there is a need for the County of Wellington to ensure that the amount, type, and location of



the County's established and planned Employment Areas are well aligned with anticipated market demand. This requires that traditional industrial sectors related to manufacturing, Goods Movement, construction and utilities are accommodated, while Employment Areas offer competitive attributes and supportive infrastructure, urban amenities, and synergies to attract the growing knowledge-based sector. These real estate trends which influence the planning of Employment Areas in today's economy, are explored below.

5.3.1 Planning for Industrial Sectors

As previously mentioned, recent industrial development activity across the G.G.H. 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:

- i. 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 industry to ensure cost efficiency given that 30% to over 50% of total parcel delivery cost is associated with this leg of the supply chain.
- ii. 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 reduce the distance inside warehouses, further speeding up the delivery process.

- iii. 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.
- iv. 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.

5.3.2 Planning for Knowledge-Based Sectors

As previously noted, recent market demand on employment lands has been increasingly driven by growth in the knowledge-based or creative class economies, including employment sectors such as advanced manufacturing; professional, scientific and technical services; finance and insurance; real estate; information and culture; health care and social assistance, and education. As these sectors continue to grow, flex office and multi-purpose facilities encompassing office and non-office uses are becoming an increasingly dominant built form within Employment Areas.

Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores “place making” as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and job growth,



provided that other necessary infrastructure requirements are met.¹ This is particularly relevant in mixed-used environments which integrate office commercial, residential and other community uses with public open spaces.

Accommodating new development and expansions related to light industrial and office uses requires that Employment Areas are planned to accommodate a pedestrian-oriented environment with access to employment-supportive uses such as retail, food and personal services as well as recreational amenities and public spaces. At the same time, demand will continue to exist for industrial and commercial uses in suburban business park and industrial settings which 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 including both urban and suburban locations. In many cases, new 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.

5.3.3 Planning for Employment Supportive Uses

As the regional economy continues to evolve, there are increasing pressures for Employment Areas to accommodate commercial service, retail and community/institutional uses. Through land-use designations and zoning by-law provisions,

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 placemaking is often encompasses the attraction knowledge-based workers and businesses with an emphasis on collaboration, connection, and innovation.



municipalities have responded by permitting a range of commercial, community and institutional uses within Employment Areas.

Typically, G.G.H. municipalities accommodate at least some commercial service (stand-alone or accessory) and limited retail activity (primarily as accessory) on employment lands that support and complement primary employment uses. To varying degrees, ancillary uses, such as restaurants, entertainment facilities and personal services (e.g. dry cleaners and hairdressers) are permitted on employment lands 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 on employment lands.

Accommodating an adequate mix of supportive uses on employment lands, such as retail and personal services, can strengthen such areas by providing amenities and services to employees/employers. Accommodating too much non-employment supportive uses, however, can lead to land-use conflicts, influence land values, and eventually contribute to the erosion of employment lands.

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 or impact the future prospects of the 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 the 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, the Growth Plan, 2019 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 and restrictions for retail on employment lands varies across the G.G.H.

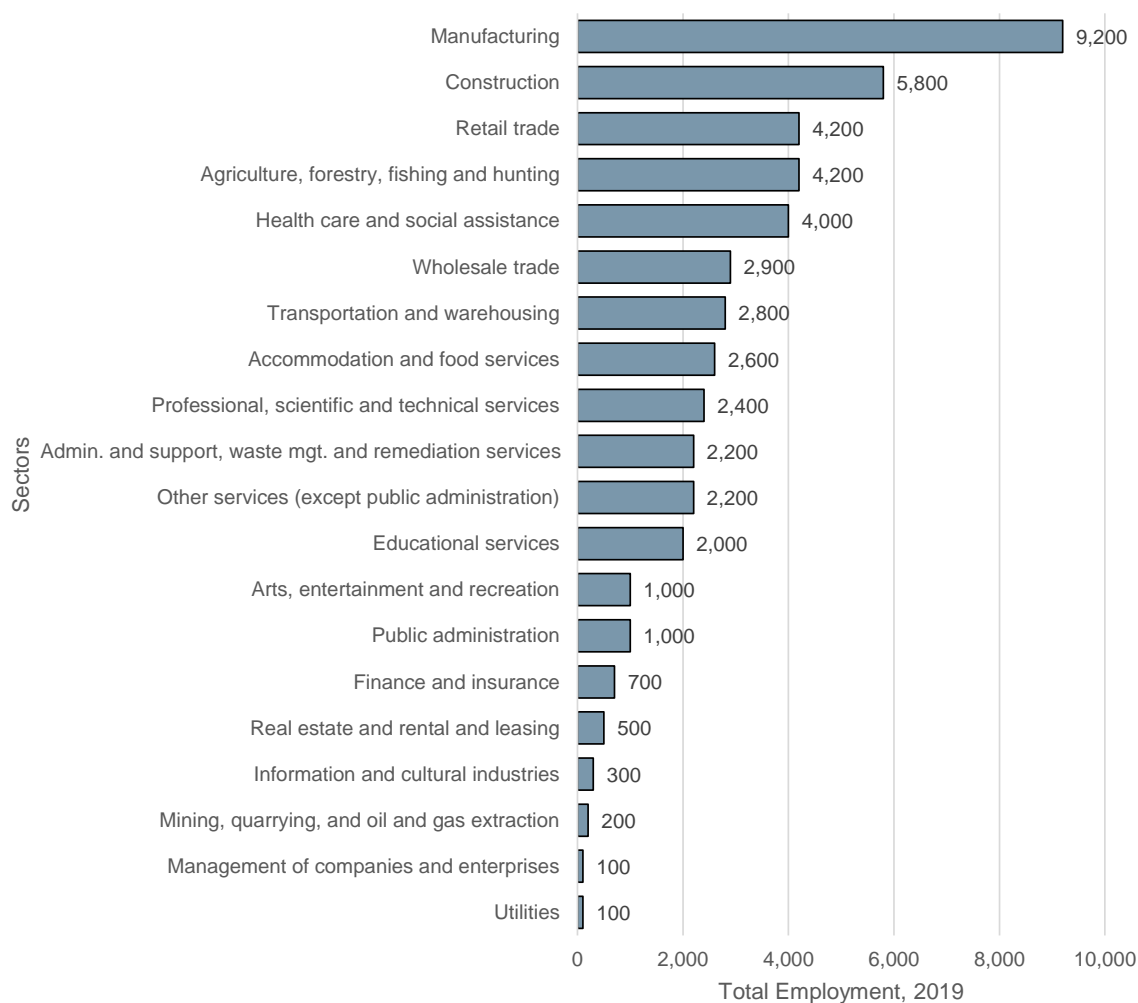


5.4 County of Wellington Employment Trends

5.4.1 Employment Base by Sector, 2019

The County of Wellington has a diverse employment base, as illustrated in Figure 5-2. The largest sector in the County is manufacturing which accommodates 9,200 jobs or 19% of total employment, as illustrated in Figure 5-2. Other key sectors include construction; retail trade; agriculture, forestry, fishing and hunting; and health care.

Figure 5-2
County of Wellington
Employment by Sector, 2019



Source: Derived from O.M.A.F.R.A. EMSI Analyst data by Watson & Associates Economists Ltd.



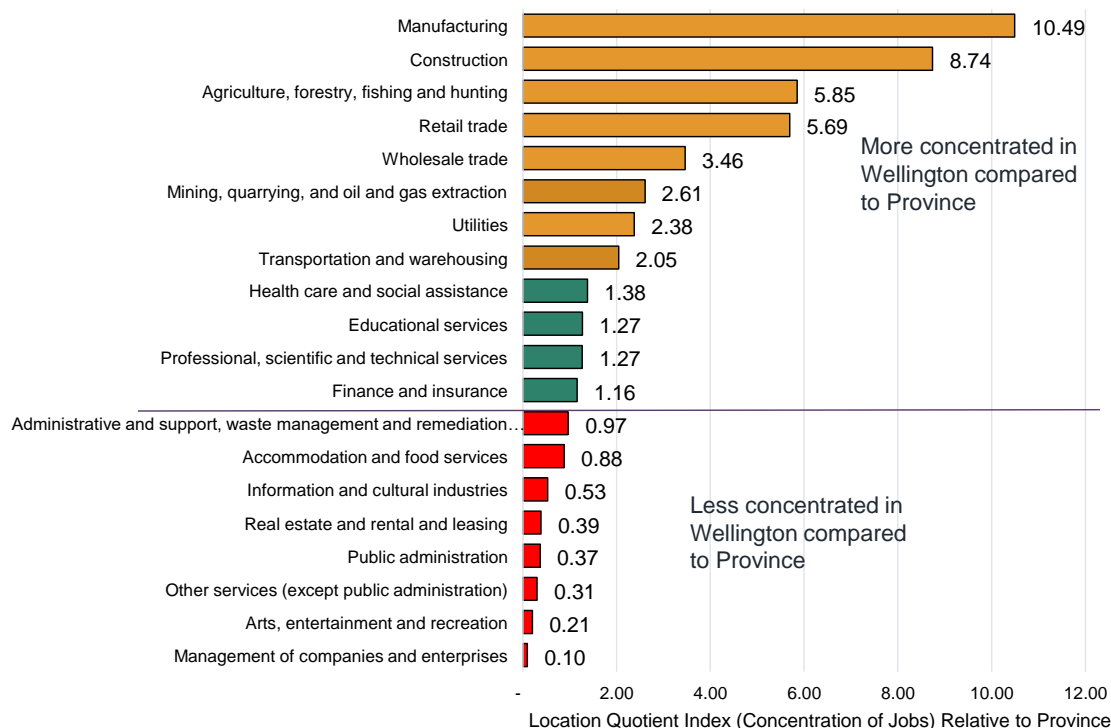
Figure 5-3 summarizes the County's concentration of employment as a portion of its employment base relative to the province. The majority of the industrial sectors in the County are more concentrated within the County relative to the province. Sectors with a very high concentration of employment within the County relative to the province are identified in orange, while sectors with a slightly higher concentration are identified in green and sectors with a low concentration are identified in red.

Manufacturing within the County is estimated to be more than 10x more concentrated than the province, followed by construction; agriculture, forestry; retail trade; wholesale trade; mining, quarrying, oil and gas extraction; utilities; and transportation and warehousing. Compared to the province, the County has a slightly higher concentration in the following commercial and institutional sectors: health care and social assistance; education services; professional, scientific and technical services; and finance and insurance.

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 5-3
County of Wellington
Employment Base Relative to the Province of Ontario



Source: Derived from O.M.A.F.R.A. EMSI Analyst data by Watson & Associates Economists Ltd.

5.4.2 Change in Employment by Sector

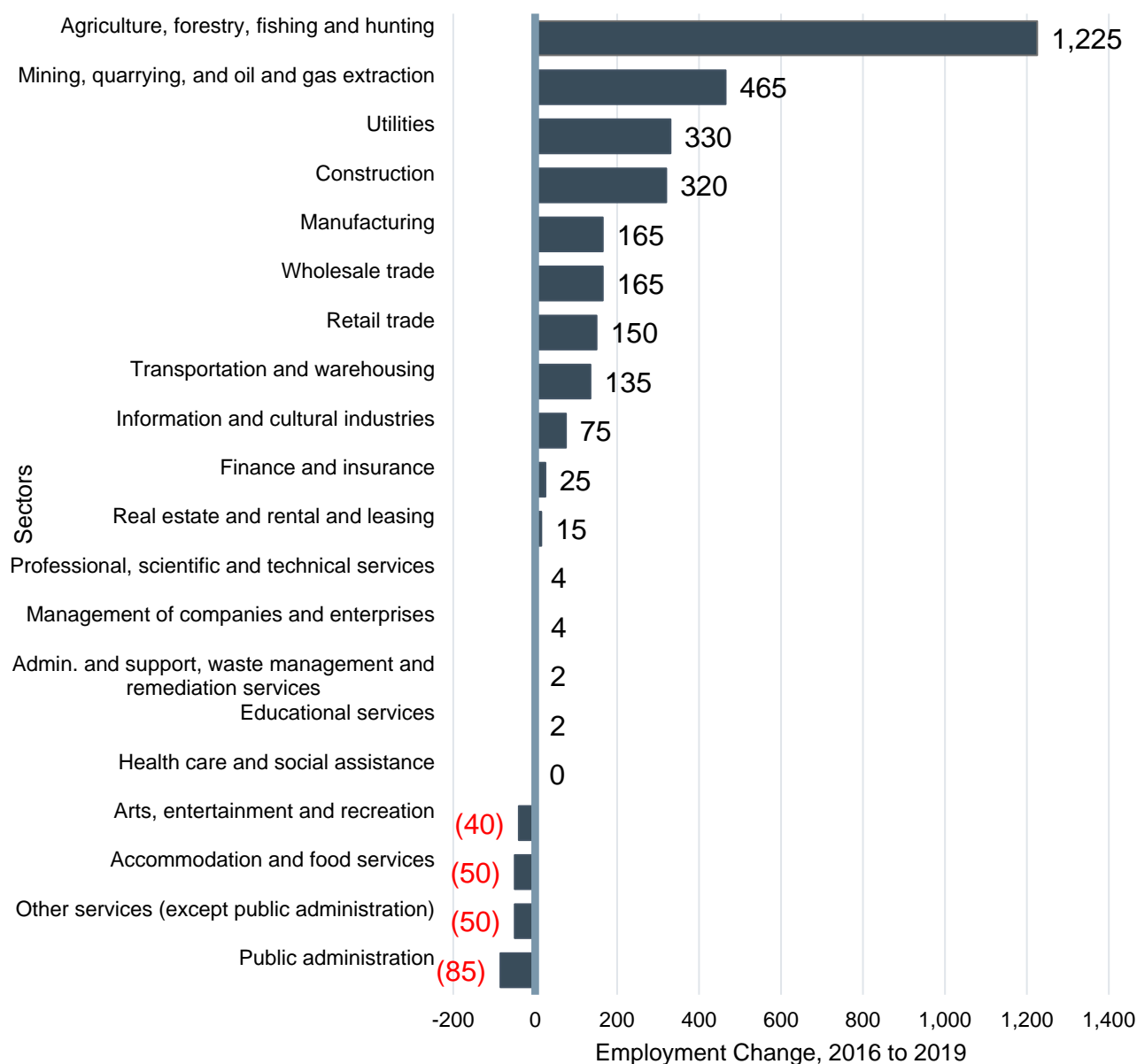
In many respects, recent employment trends within County of Wellington are similar to the broader trends experienced across the G.G.H. and the Province as a whole. As summarized in Figure 5-4, over the 2016 to 2019 period, the County of Wellington added employment in several employment sectors, including primary sectors (agriculture, forestry, fishing and hunting; and mining, quarrying, and oil gas extraction), industrial sectors (utilities; construction; manufacturing; transportation and warehousing; and wholesale trade) and commercial sectors (retail trade; information and culture industries; and finance and insurance).¹ Most of these sectors, as previously discussed, already had a strong presence in the County. Over the forecast horizon, it is anticipated

¹ Based on OMAFRA EMSI Analyst data.



that a number of these sectors will continue to grow based on the macro-trends and employment outlook previously discussed.

Figure 5-4
County of Wellington
Change in Employment by Sector,
2016 to 2019



Source: Derived from O.M.A.F.R.A. EMSI Analyst data by Watson & Associates Economists Ltd.



5.5 Employment Forecast to 2051 by Employment Category

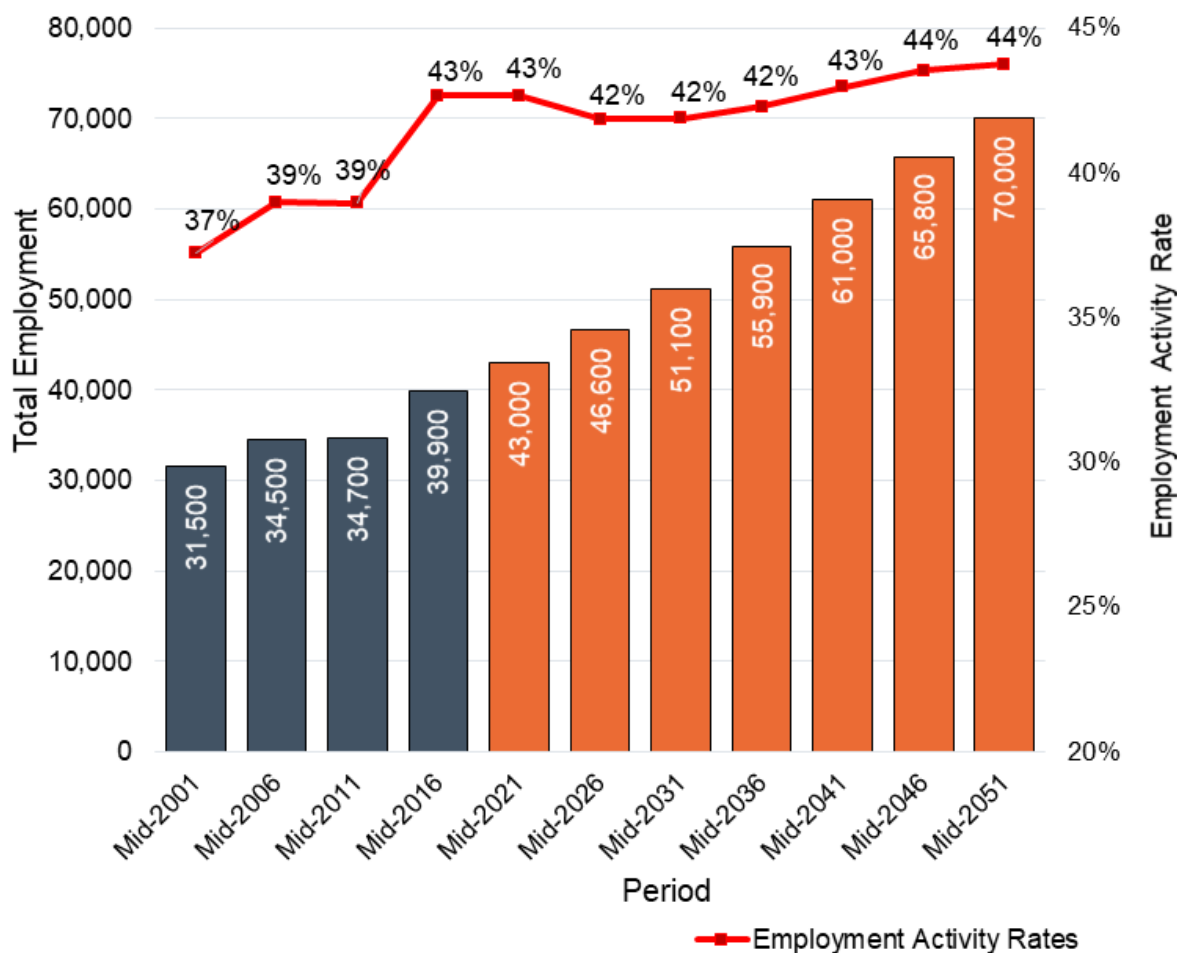
5.5.1 *County-Wide Employment Forecast to 2051*

As summarized in Figure 5-5, 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 43% 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 population-related employment sectors such as retail, accommodation and food, professional, scientific and technical scientific services and health care. Growth within these population-related employment sectors are anticipated to be driven by population growth within the County's Primary Urban 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 30% of the employment growth over the 2016 to 2051 period. This employment generally does not directly generate significant additional demand for urban land.



Figure 5-5
County of Wellington
Employment Forecast and Employment Activity Rate, 2016 to 2051



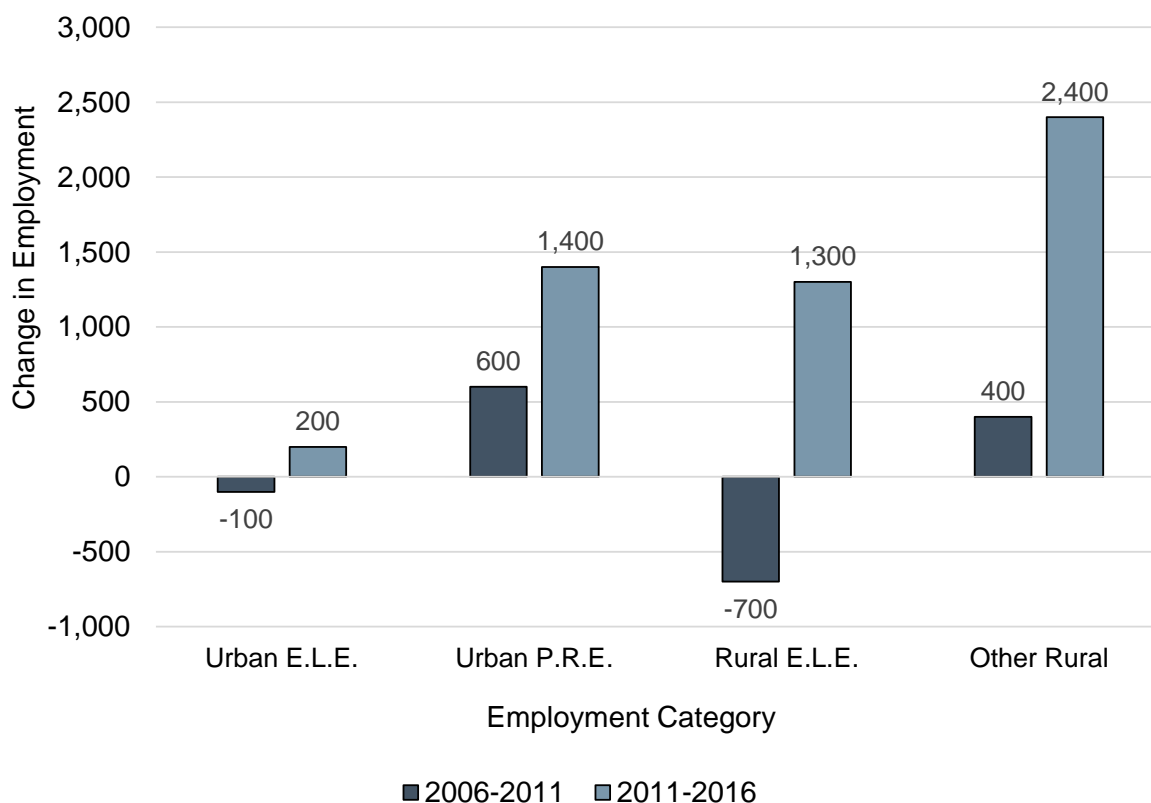
Source: Watson & Associates Economists Ltd.

5.5.2 County-Wide Employment by Employment Category, 2006 to 2016

Over the 2006 to 2016 period, as summarized in Figure 5-6, a large portion of the County's employment growth has been concentrated in the Rural System, approximately 62% of employment growth.



Figure 5-6
County of Wellington
Change in Employment by Category,
2006 to 2011 and 2011 to 2016



Source: Watson & Associates Economists Ltd.

As previously discussed, primary sector employment (e.g. agriculture and aggregate industries), is a major component of employment in the Rural System. Strong employment growth has also been recently experienced in Rural Employment Areas within Puslinch and Guelph/Eramosa. The Township of Puslinch, which is entirely within the Rural System, represents nearly half of the net rural employment growth (Rural E.L.E. and Other Rural) over the 2006 to 2016 period. Guelph/Eramosa, Mapleton and Wellington North, which have a large employment base within the Rural System, represent the remaining portion of the net employment growth in Rural E.L.E. and Other Rural. The rural employment base of the Rural System within the other Area Municipalities of the County either decreased or slightly increased over this period.



Within the Urban System, Urban P.R.E. accounted for the largest increase in employment over the 2006 to 2016 period, reflecting growth in a number of commercial and institutional sectors, in particular commercial services, retail trade and health care. Urban E.L.E. experienced a modest increase over the past five years. While E.L.E. growth over this period has been modest, it is estimated that Urban E.L.E. growth has significantly increased since 2016. As previously discussed, employment levels within a number of industrial sectors have increased over the 2016 to 2019 period. It is estimated that as of 2021, the urban E.L.E. accounts for 7,500 employees in the County, an increase of 500 employees since 2016 or annual growth of 100 employees annually.

5.5.3 County-Wide Employment by Employment Category Forecast to 2051

Figures 5-7 and 5-8 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.

5.5.3.1 Urban P.R.E. Employment

Urban P.R.E. as previously discussed, includes employment in institutional and commercial sectors, primarily within Urban Centres, including retail, personal services, accommodation and food, health and social services, and education and other service sector.

- Urban P.R.E. growth over the 2016 to 2051 period is expected to add 520 employees annually, representing 60% of overall employment growth in the County. As a comparison, Urban P.R.E. added 200 employees annually over the 2006 to 2016 period.
- It is anticipated that 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 Urban Centres is primarily oriented towards local-serving P.R.E. uses (uses that serve the immediate needs of residents) and are not as susceptible to e-commerce. P.R.E. uses related to W.A.H. 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 comprised the bulk of the P.R.E. growth over the next 30 years.

- Currently, there are approximately 5 residents for every 1 P.R.E. Community Area job in Wellington County. Since 2006, this ratio has increased from 4 residents for every 1 P.R.E, which suggests that historical P.R.E. employment growth is not growing at the same pace as population growth.
- Over the forecast horizon, it is anticipated that the total P.R.E. resident ratio will decrease slightly to 4 residents per 1 P.R.E. Community Area job (same ratio as 2006), largely driven by strong growth related to W.A.H. employment.
- Urban P.R.E. employment includes W.A.H. employment which is anticipated to account for just under a quarter (22%) of the P.R.E. employment growth.

5.5.3.2 *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 Urban 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 manufacturing sector represents a large share of the employment base within the County (19% of employment in the County).¹ This sector has experienced steady growth over the past two decades largely fueled by small-scale manufacturing operations, as well as increase in employment at existing large-scale manufacturing operations. The automotive parts manufacturing facility, TG Minto for example (approximately 850 employees), has added a series of expansions that has resulted in a net increase in employment in the Palmerston Urban Centre.²
- The County has also experienced steady growth in industrial sector jobs on employment lands over the past two decades in sectors related to construction, wholesale trade, and transportation/warehousing.

¹ Based on O.M.A.F.R.A. EMSI Analyst data.

² TG Corporate website – media release:

<http://www.toyodagosei.com/News/1283/expansion-at-tg-minto-in-canada>, accessed May 30, 2021.



- Looking forward over the next 30 years, the County is anticipated 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 over a quarter (26%) of the County's employment growth, or 210 employees annually, up from 49 employees annually over the 2006 to 2016 period.

5.5.3.3 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 municipal services (water and wastewater servicing).

- Rural E.L.E. represents a large share of the County's employment base. Over the past decade Rural E.L.E. growth has been particularly strong, adding 120 employees annually and representing approximately 18% over the 2006 to 2016 period.
- Recent Rural E.L.E. growth has been concentrated in the Employment Areas of Puslinch and Guelph/Eramosa. These Employment Areas have added several new industrial operations, as well as expansion of existing facilities.
- 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 or fire protection.
- It is anticipated that Rural E.L.E. will accommodate approximately 10% of the County's employment growth, or 90 employees annually. Rural E.L.E. is anticipated to continue to be concentrated within the Township of Puslinch and the Township of Guelph/Eramosa which offer convenient access to major highways.

5.5.3.4 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.

- Over the past decade, this category of employment has represented just over half (52%) of the County's employment growth over the 2006 to 2016 period.



- The primary sector which includes agriculture and aggregates industries has been a major driver of rural employment growth. Over the 2016 to 2019 period, the agriculture sector added approximately 1,300 jobs in the County, while Mining, quarrying, and oil and gas extraction (largely aggregates) added 500 jobs.
- Over the forecast horizon, it is anticipated that rural employment will continue to grow in rural-based sectors (primary sectors), as well as growth related to recreation and tourism.
- Value-added on-farm diversified uses, in particular are anticipated to be a key growing component of the County's rural W.A.H. 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 10% of the County's employment growth, or 40 employees annually.

Figure 5-7
County of Wellington
Employment Forecast by Employment Category,
2006 to 2016 and 2016 to 2051

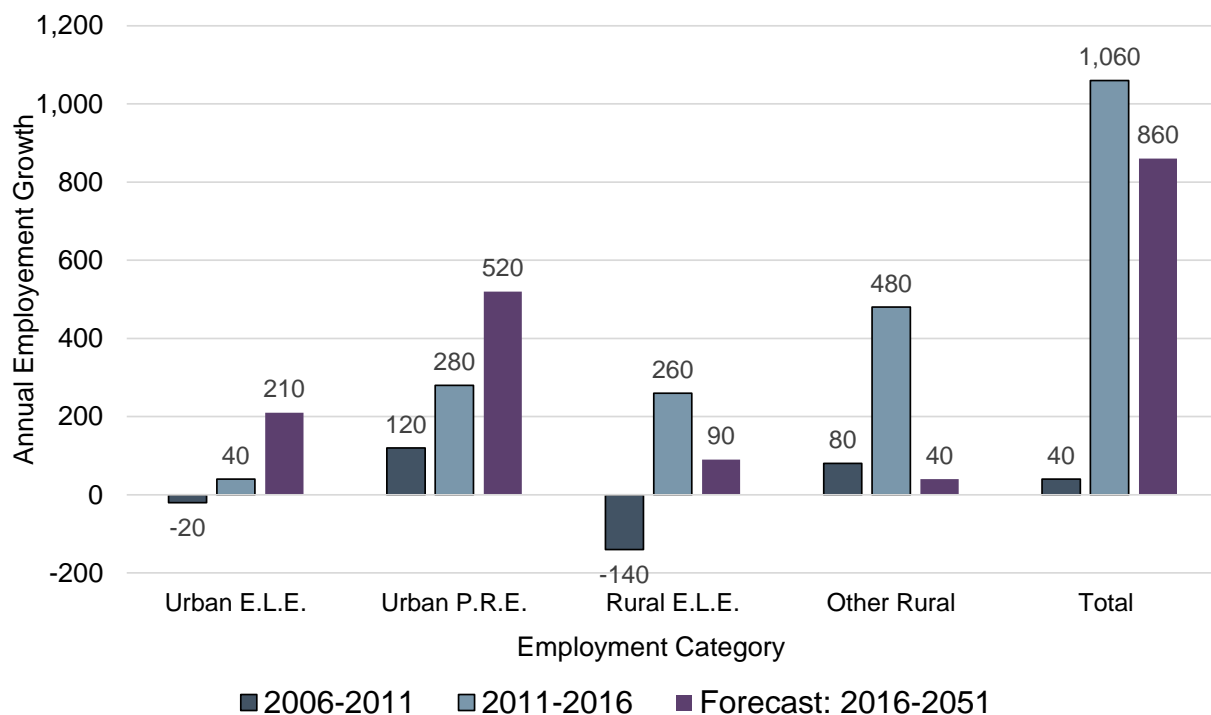
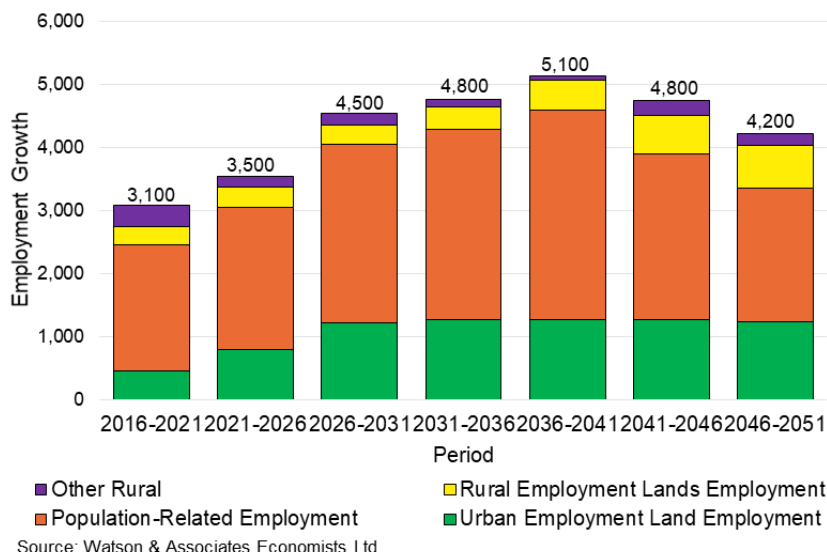




Figure 5-8
County of Wellington
Employment Forecast by Employment Category, 2016 to 2051



5.6 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.

Further details on the growth allocation by geographic policy will be discussed in the Phase 2 Report, including details on employment density, employment land absorption, profile of existing conditions of Employment Areas and the commercial base, as well as policy considerations. The following summary utilizes a 2020 to 2051 period, to align with the existing inventory of vacant non-residential lands, as part of the land needs analysis that will be completed in the Phase 2 Report.

5.6.1.1 Urban System

Overall, the Urban System is anticipated to accommodate 85% of the County's employment growth over the 2020 to 2051 forecast horizon.



Urban Employment Areas

Over the forecast period, it is anticipated that 100% of Urban E.L.E. will be accommodated in Urban Employment Area. P.R.E. uses are anticipated to comprise 20% of the employment growth accommodated in Urban Employment Areas, while E.L.E. is anticipated to represent 80% of the Urban Employment Area growth over the 2020 to 2051 period. P.R.E. employment uses accommodated in Urban Employment Areas are anticipated to comprised commercial uses that support the function of the Employment Area, as well as select commercial uses that are permitted in Employment Areas. Urban Employment Areas are anticipated to accommodate 32% of the County's employment growth (9,040 jobs) over the 2020 to 2051 horizon.

Urban Community Areas

Over the forecast it is anticipated that Urban Community Areas will accommodate 89% of the County's Urban P.R.E. forecast. The remaining 11% of Urban P.R.E. forecast is anticipated to be accommodated in Urban Employment Areas. Urban Community Areas are anticipated to accommodate 53% of the County's employment growth (14,960 jobs) over the 2020 to 2051 horizon.

5.6.1.2 Rural System

Overall, the Rural System is anticipated to accommodate 15% of the County's employment growth over the 2020 to 2051 forecast horizon.

Rural Employment Areas

Over the forecast it is anticipated that the majority of Rural E.L.E. will be accommodated in Rural Employment Areas (95%). A small portion (5%) of Rural E.L.E. is anticipated to be accommodated on small rural sites. It is anticipated that Rural Employment Areas will accommodate a small portion of P.R.E. (less than 200 employees). Rural Employment Areas are anticipated to accommodate 11% of the County's employment growth (2,980 jobs) over the 2020 to 2051 horizon.

Other Rural Employment

The remaining rural employment is forecast to accommodate 4% of the County's employment over the forecast horizon.



5.7 Observations

The County faces a number of opportunities and challenges with respect to employment growth in light of the evolving structural changes in the economy and disruptive factors which continue to influence the nature of the economy. One of these challenges relates to macro-economic trends over which the County has limited control. This includes the relative strength of the global economy, international trade policy and the competitiveness of the Canadian economic base relative to other established and emerging global markets.

In contrast to the above, the County of Wellington has considerable control and ability to position itself in a positive manner when considering the County's regional competitive ranking. This requires the County to continue marketing itself as a hub for innovation, equipped with the human capital that is required to encourage on-going innovation, entrepreneurship, small business development and local investment retention. A major factor for the future competitiveness of the County's economic base relates to the structure, quality and "readiness" of its Employment Areas.

Over the next several decades the County's employment base is anticipated to steadily grow across a broad range of export-based and population serving employment sectors. The County, however, will be competing to attract and retain these sectors with other municipalities across the G.G.H. and beyond. The County of Wellington has a diverse and growing economic base with a strong employment base in both the Rural System and the Urban System. Over the long term, the County is expected to accommodate balanced growth between residential and non-residential development and provide increasing local job opportunities for the residents of Wellington. By 2051, the County's employment base is forecast to reach approximately 70,000, in accordance with Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 30,100 jobs from 2016, or an annual employment growth rate of 1.7%.

Over the 2020 to 2051 period, employment within Urban Employment Areas is anticipated to account for 32% of total employment and accommodate a diverse range of industrial sectors, new and expanding businesses. Urban Community Areas are anticipated to account for the largest share of the County's employment growth at 53% driven largely by work at home employment, commercial services, tourism services and institutional uses.



The County's Rural System is anticipated to continue to remain a large component of the County's employment base. It is anticipated that growth within the Rural System will be supported by an expanding agriculture base, opportunities for on-farm diversification, recreation activities and small-scale Rural E.L.E. uses.



Chapter 6

Employment Growth Allocations



6. Employment Growth Allocations, 2016 to 2051

This chapter provides a summary of the forecast employment allocations by Area Municipality as well by as Urban Centre within County of Wellington. Detailed tables on employment growth allocations are provided in Appendix F.

6.1 Introduction

6.1.1 *Allocation Review*

The employment growth forecast by Area Municipality 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 Urban 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 Wellington County commuter-shed;
- Discussions with County staff regarding recent non-residential development trends and future employment prospects by Area Municipality;
- Review of recent business openings and closures information prepared by the County;
- Impacts of local population growth by Area Municipality on demands for P.R.E. employment;
- Review of Urban and Rural Employment Area absorption between 2011 and 2019; and

¹ Details to be provided in the Phase 2 Report.



- Recent non-residential building permit data by industrial, commercial and institutional (I.C.I.) sector by Area Municipality.

For each of the County's Area Municipalities employment is forecast to grow at a steady rate relatively to historical levels. This is partially driven by steady P.R.E. growth which is largely driven by strong local population growth. Accordingly, the largest share of P.R.E. has been allocated to Area Municipalities with the largest share of population growth.

6.1.2 Overview of Community Structure - Non-Residential Lands

Figure 6-1 provides a map of the seven Area Municipalities within the County of Wellington. Within each of the Area Municipalities, each of the Primary and Secondary Urban Centres and hamlet areas have been illustrated.

Figure 6-2 illustrates the County's non-residential land-use designations, using the Arthur Urban Centre and 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:

- Highway Commercial;
- Central Business District;
- Industrial (Urban Employment Area); and
- Rural Employment Area.

Chapter 5 (sub-section 5.1.1.) provides further details on the role, function and purpose of these designations. 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.



Figure 6-1
County of Wellington
Map of Area Municipalities and Settlement Areas

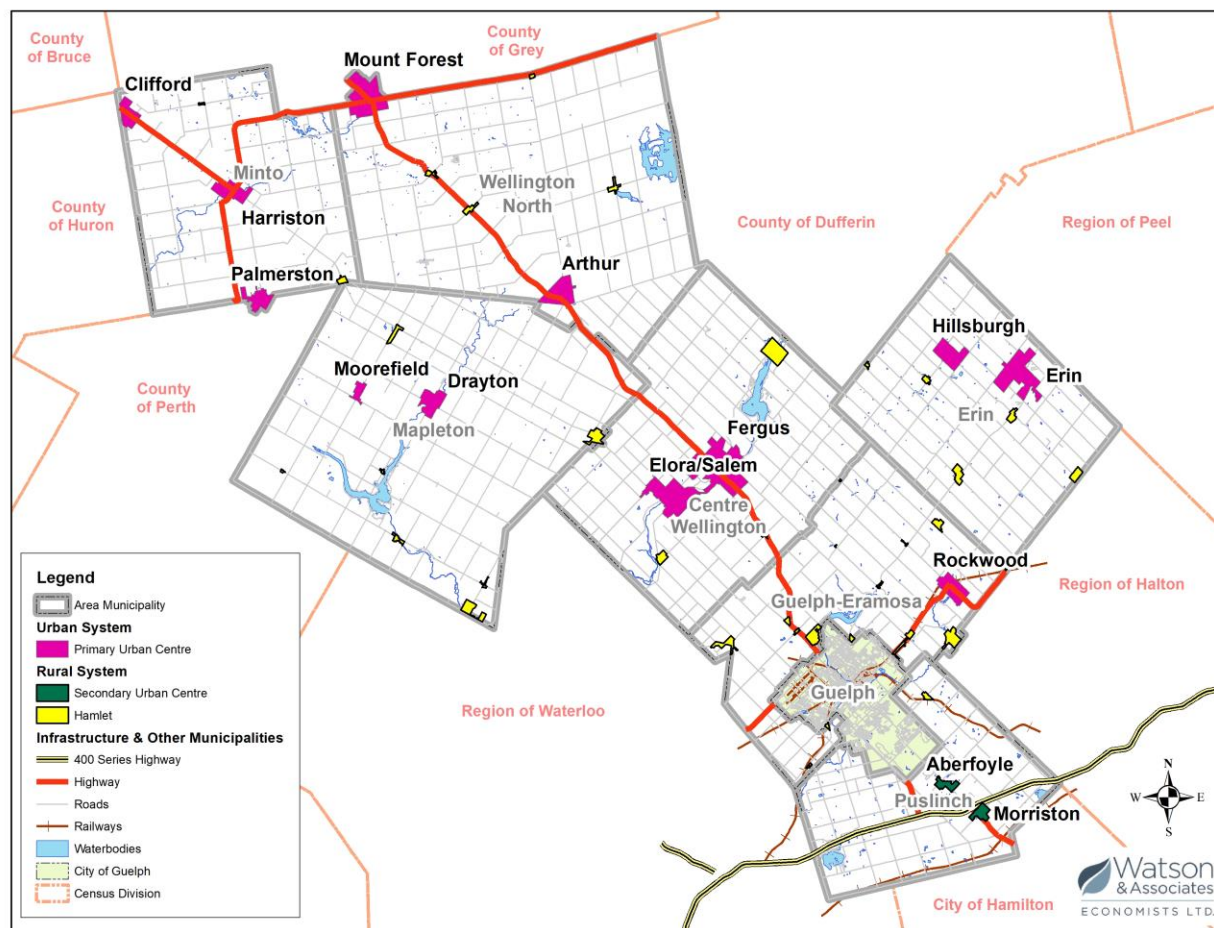
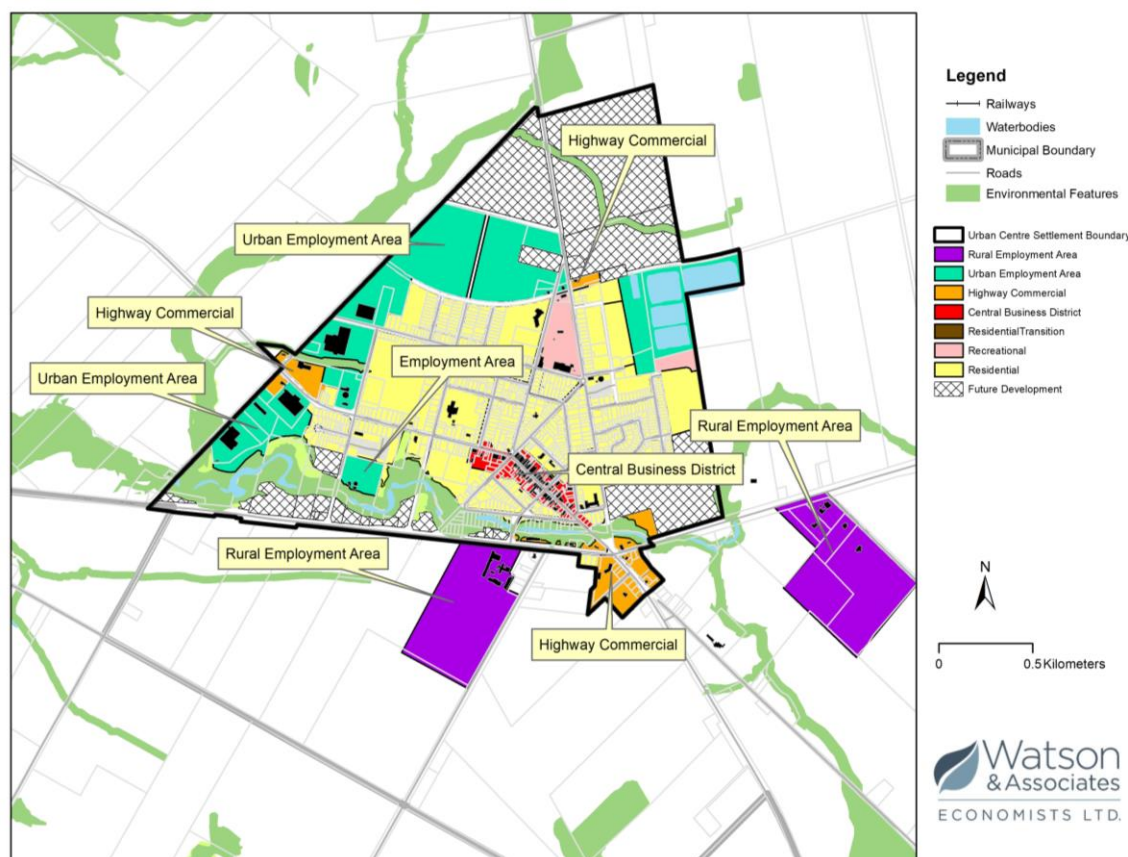




Figure 6-2
County of Wellington
Arthur Primary Urban Centre and Surrounding Rural Employment Areas
Map of Area Non-Residential Areas



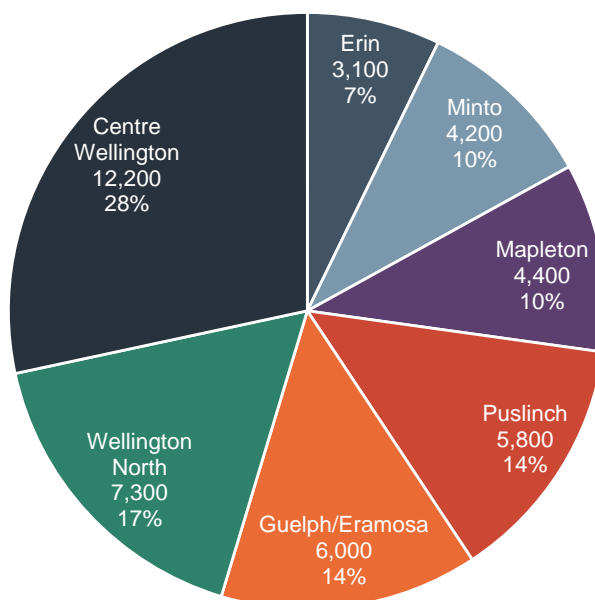
6.2 Existing Employment Base by Area Municipality, 2021

6.2.1 Employment Estimates by Area Municipality, 2021

As of 2021, the County of Wellington the employment base was estimated at 43,000. As summarized in Figure 6-3, of the County's 2021 employment base, just under a third (28%) of the County's population base is accommodated within the Township of Centre Wellington, followed by the Township of Wellington North at 17%, the Township of Guelph/Eramosa at 14% and the Township of Puslinch at 14%. The three remaining Area Municipalities (Township of Mapleton, Town of Minto and Town of Erin) comprise between 7% to 10% of the County's employment base as of 2021. Further details on the employment base for each Area Municipality is provided in Appendix F.



Figure 6-3
County of Wellington
Share of 2021 Estimate by Area Municipality



Source: Watson & Associates Economists Ltd.

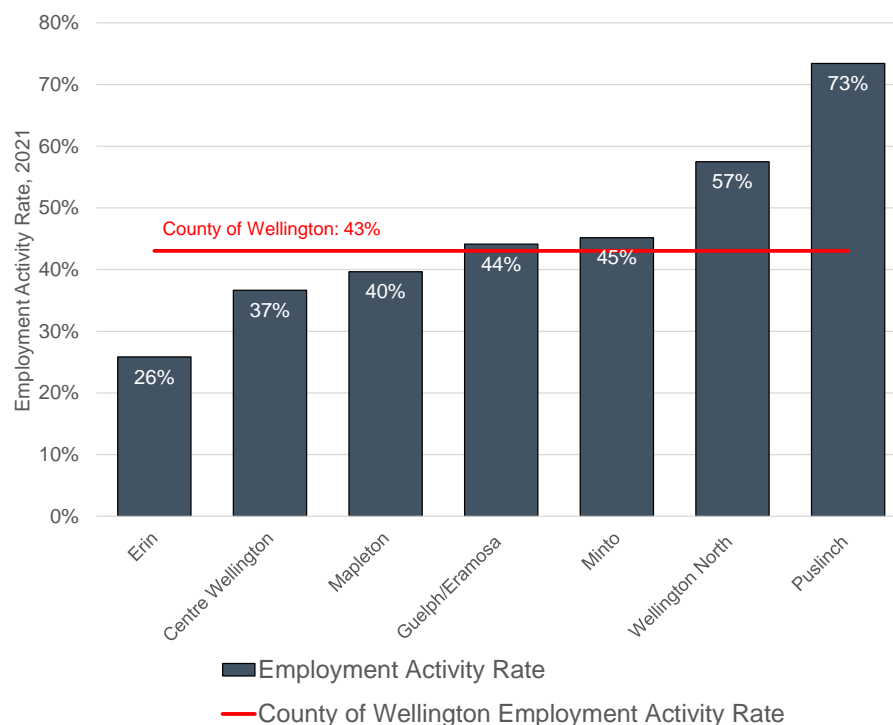
6.2.2 Area Municipality Employment Activity Rates

Figure 6-4 summarizes employment activity rate (ratio of jobs to population) by Area Municipality compared to the County of Wellington employment activity rate of 43% as of 2021. A high employment activity rate suggests a larger portion of employment relative to the population base of the Area Municipality. As summarized, the Township of Puslinch has the highest employment activity rate at 73%. Puslinch has a large employment base and relies on in-commuting from the surrounding G.G.H. municipalities. Other Area Municipalities with a high employment activity rate include the Township of Wellington North at 57%, followed by the Town of Minto at 45% and the Township of Guelph/Eramosa at 44%. The remaining Area Municipalities (Township of Mapleton, Township of Centre Wellington and the Town of Erin) have an employment activity rate below the County-wide employment activity rate of 43%. The Town of Erin and the Township of Centre Wellington accommodate a large out-commuting population base due to their proximity to a number of large G.G.H. employment markets. As a result, this negatively impacts their respective employment activity rate.



Looking forward, a key opportunity and challenge for the Town of Erin and Township of Centre Wellington will be to accommodate live/work opportunities as the population base grows, while maintaining complete communities. As previously discussed, outward growth trends, particularly from high growth west and north G.T.H.A. municipalities is placing development pressures on municipalities in the GGH Outer Ring. For high population growth municipalities such as Centre Wellington and Erin, maintaining or improving the employment activity rate will require a specific focus on attracting an increased share of export-based employment sectors in addition to P.R.E. jobs. Over the forecast period it is assumed that the employment activity rate in Centre Wellington will increase from 37% in 2021 to 43% by 2051. The employment activity rate for the Town of Erin is anticipated to be stabilized by 2051 at a similar rate as of 2021.

Figure 6-3
County of Wellington
Employment Activity Rate by Area Municipality, 2021



Source: Watson & Associates Economists Ltd.



6.2.3 Area Municipality Employment by Type, 2021

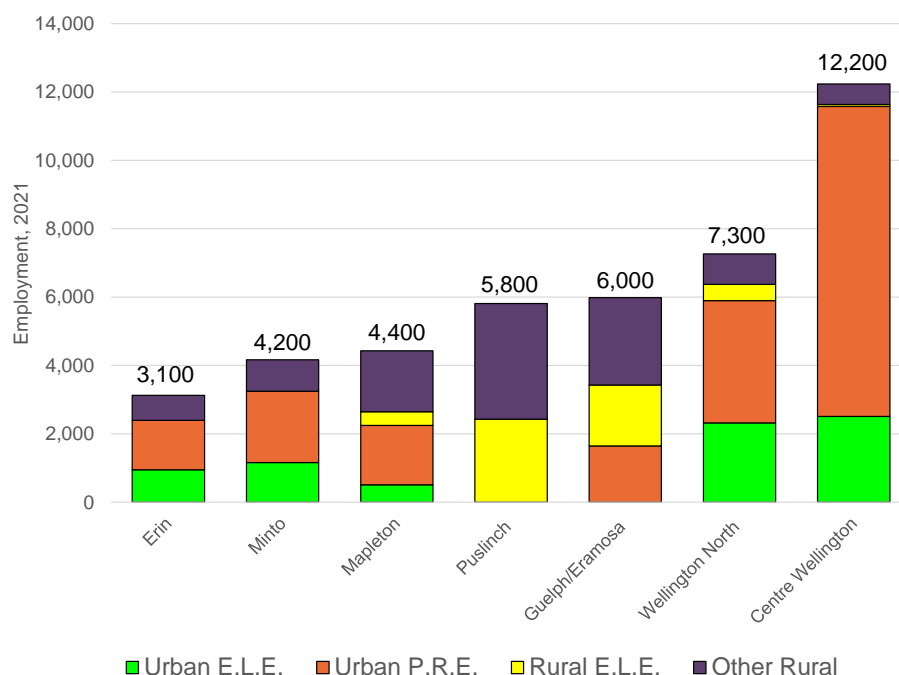
As previously discussed, the County of Wellington has a diverse employment base, accommodating a range of sectors and uses in the Urban and the Rural Systems. Figure 6-4 illustrates the 2021 estimated employment for each Area Municipality by employment type (Urban E.L.E., Urban P.R.E. and Rural E.L.E.).

Key highlights include:

- The Township of Centre Wellington has the largest share of Urban P.R.E. employment (represents 46% of the County's Urban P.R.E.);
- The Township of Centre Wellington and the Township of Wellington North accommodate a large portion of the County's Urban E.L.E., at approximately 34% and 31% respectively (combined at 65% of the County's Urban E.L.E.);
- The Township of Puslinch and the Township of Guelph/Eramosa accommodate the majority of the County's Rural E.L.E. employment, at approximately 35% and 47% respectively (combined at 82% of the County's Rural E.L.E.);
- The Township of Mapleton and the Township of Wellington North offer a diverse employment base all four employment categories (Urban P.R.E., Urban E.L.E., Rural E.L.E. and Other Rural); and
- The Town of Minto and the Town of Erin accommodate a mix of Urban P.R.E., Urban E.L.E. and Other Rural. The Town of Minto and the Town of Erin does not have a Rural Employment Area.



Figure 6-4
County of Wellington
2021 Estimate by Employment Type



Source: Watson & Associates Economists Ltd.

6.2.4 Industrial Sector Employment by Area Municipality, 2016

As previously discussed in Chapter 5, E.L.E. in the County is primarily comprised of industrial employment sectors accommodated within the County's Urban Employment Areas and Rural Employment Areas, and to a lesser extent on rural lands throughout the County.

Figure 6-5 provides a summary of the industrial sectors by Area Municipality based on 2016 Census (includes N.F.P.O.W. employment). As summarized in this figure, the composition of industrial sector employment varies by Area Municipality. Key findings include:

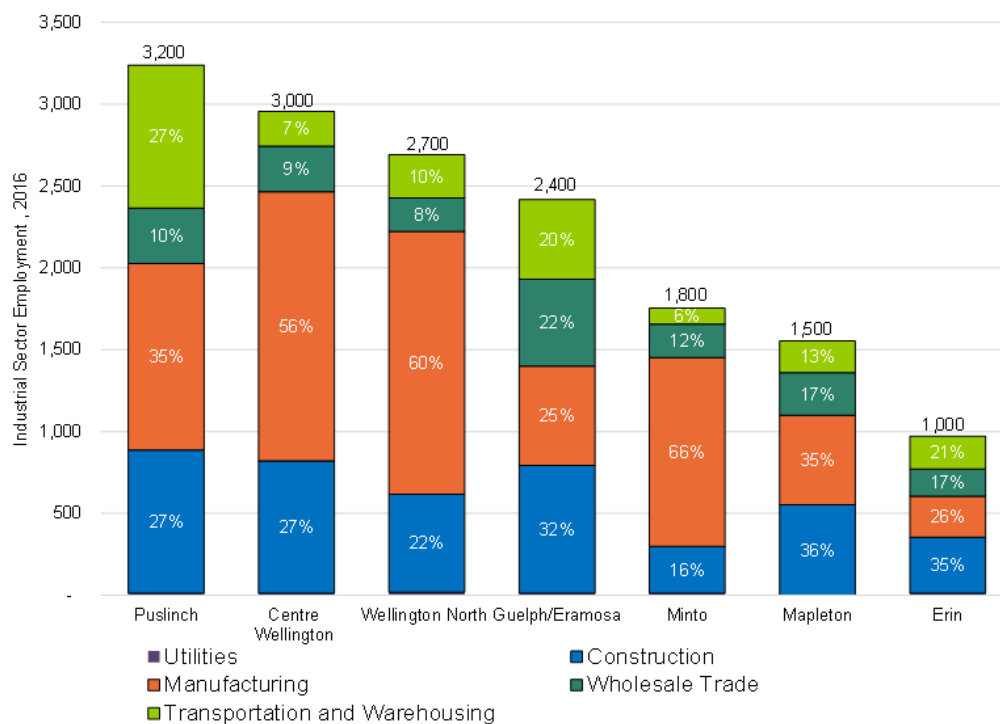
- Manufacturing employment represents the largest component of the industrial employment base in Minto (66%), Centre Wellington (56%) and Wellington North (60%). These Area Municipalities are home to some of the County's largest



manufacturing employers in the County, including automotive parts, food processing and plastics manufacturing operations.

- The construction employment sector represents just under a third (27%) of the industrial employment base. Across the County, construction represents approximately 16% (Minto) to 36% (Mapleton) of the industrial base.
- While the transportation and warehousing sector comprises a large share of Puslinch's industrial base (27%) relative to other Area Municipalities in the County and also accommodates the largest share of County's employment in that sector (38%). Puslinch's proximity and access to Highway 401 makes the Township an ideal location for the transportation and warehousing sector.

Figure 6-5
County of Wellington
Industrial Sector Employment by Area Municipality, 2016



Source: Based on Statistics Canada, 2016 Census, Place of Work data by Watson & Associates Economists Ltd.
Note: Utilities represents a low share of the County's industrial base.



6.2.5 Employment Growth Trends by Area Municipality, 2006 to 2016

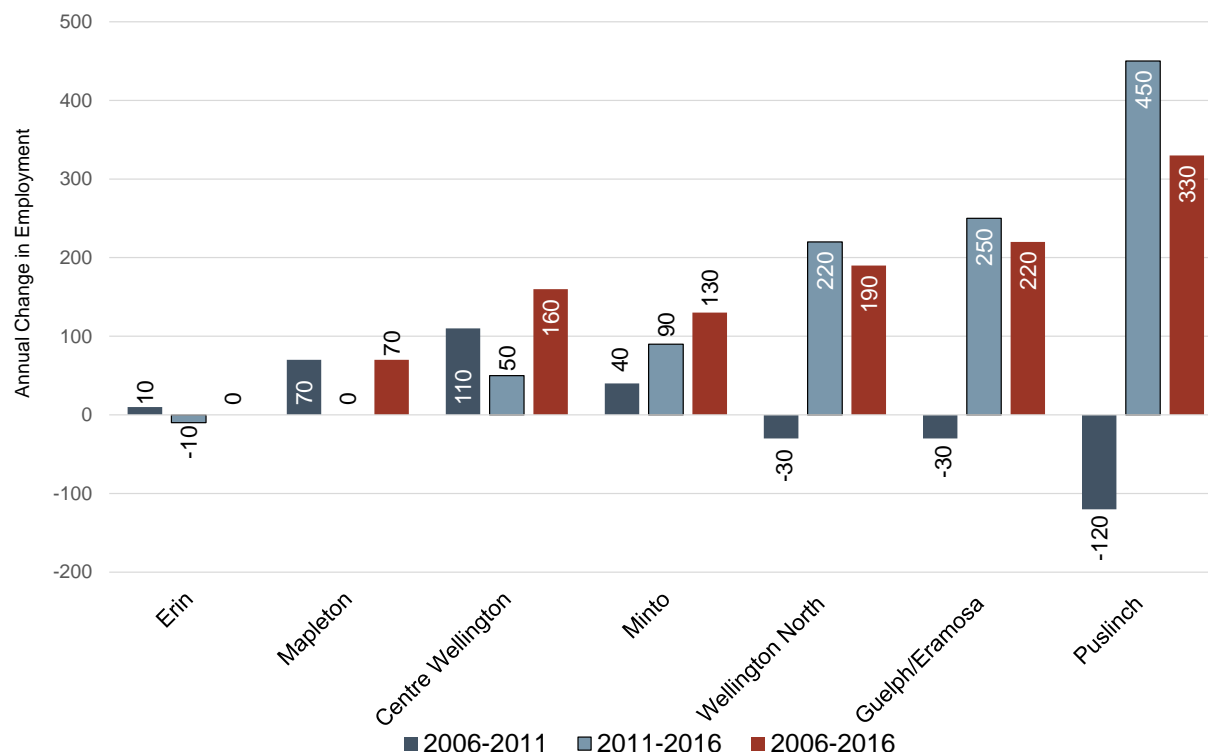
Figures 6-6 summarizes historical employment growth trends in the County of Wellington by Area Municipality over the past 10 years by Census period. Over the most recent 10-year Census period, the County of Wellington added 1,090 employees annually, representing an employment growth rate of 1.5%. Figure 6-6 provides a comparison of the average annual employment growth added over the 2006 to 2011 period and over the 2011 to 2016 period by Area Municipality.

Key highlights include:

- Puslinch experienced the highest rate of annual employment growth, adding 330 employees annually over the 2006 to 2016 period. Employment growth in Puslinch was driven by Rural Employment Area growth, as well as employment growth in the remaining rural area.
- Guelph/Eramosa, Centre Wellington and Minto averaged between 130 and 220 employees annually over the 2006 to 2016 period. Growth in Centre Wellington was largely driven by Urban P.R.E. employment growth. Rural Employment Area growth was a major component of employment growth in Guelph Eramosa, while Minto experienced strong Urban Employment Area growth over this period.
- Employment growth in Township of Mapleton averaged 70 jobs annually, lower than the other Area Municipalities.
- The Town of Erin experienced no net increase in employment over this period. It is anticipated that over the forecast horizon, annual employment growth in the Town of Erin will significantly increase with additional municipal water/wastewater servicing anticipated, coupled with strong population growth.



Figure 6-6
Historical Annual Employment Growth by
Area Municipality, 2006 to 2011 and 2011 to 2016



Source: Statistics Canada, Place of Work Employment by Watson & Associates Economists Ltd.

6.3 Employment Forecast by Area Municipality, 2016 to 2051

Figures 6-7 through to 6-11 summarize the employment forecast to 2051 by Area Municipality. Further details are provided in Appendix F. While employment growth rates vary significantly by geographic area, each of the Area Municipalities share several relatively common attributes with respect to long-term employment trends. These include:

- All Area Municipalities 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 all Area Municipalities which are not constrained by land or water/wastewater servicing requirements;



- Future employment growth will comprise a diverse range of employment sectors, including E.L.E. employment; and
- P.R.E. employment 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, a number of assumptions were made with respect to the employment growth potential for each Area Municipality within the County, based on discussions with County and the County of Wellington M.C.R. Technical Resource Team.

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 F which includes details on the employment by category, existing employment base and employment forecast to 2051.

Centre Wellington

- Centre Wellington's existing employment base as of 2021 comprises of 95% of the employment within the Urban System and 5% of the population in the Rural System. Centre Wellington's employment base compared to the other Area Municipalities is more oriented towards the County's Urban System.
- As summarized in Figure 6-7, Centre Wellington is anticipated to accommodate nearly half (48%) of the County-wide employment growth over the forecast horizon. A large portion of this growth is anticipated to be accommodated in P.R.E. serving the local population base (74%).
- Centre Wellington is anticipated to grow at annual employment rate of 2.5% 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) annual growth rate of 0.7% annually.
- As summarized in Figure 6-10, Centre Wellington is anticipated to add 14,700 employees over the 2016 to 2051 period, representing approximately 420 employees annually. This is significantly higher than the annual employment added over the 2006 and 2016 period (as previously summarized in Figure 6-6, the annual employees over the 2006 to 2016 period was 160 employees).



Erin

- Erin's existing employment base as of 2021 comprises of 77% of the employment within the Urban System and 23% of the employment in the Rural System. Similar to Centre Wellington, a large portion of the employment base is in the Urban System.
- As summarized in Figure 6-7, Erin is anticipated to accommodate 11% of the County's employment growth over the forecast horizon.
- Employment growth within Erin is anticipated to be significantly higher than historical trends given anticipated investments and expansions in municipal water and wastewater servicing in Erin Village and Hillsburgh.
- As summarized in Figure 6-9, Erin is anticipated to achieve a relatively higher rate of employment growth (2.1% annually) compared to the other Area Municipalities within the County.
- As summarized in Figure 6-10, Erin is anticipated to add 3,200 additional employees over the 2016 to 2051 period, approximately 90 employees annually.
- Employment growth is anticipated to include 74% Urban P.R.E. and 25% Urban E.L.E. The Rural System is anticipated to comprise the remaining 1% of the employment growth.

Guelph-Eramosa

- The existing (2021) population of Guelph-Eramosa base comprises 28% of the population within the Urban System and 72% of the population in the Rural System. Guelph-Eramosa has a small employment base in the Urban System comprised of entirely Urban P.R.E.
- As summarized in Figure 6-7 Guelph-Eramosa is anticipated to accommodated a small share (4%) of the County's employment growth over the forecast horizon. The majority of employment growth is anticipated to be accommodate within the Rural System given limitations on municipal servicing within the Urban Centre of Rockwood.
- The forecast annual employment growth rate of Guelph-Eramosa is anticipated to average 0.5%, which is lower than the growth rate observed over the most recent 10-year census period of 2.1% annually.



Puslinch

- The existing (2021) population base of Puslinch existing is entirely accommodated within the Rural System. As previously noted, Puslinch has two Secondary Urban Centres, Aberfoyle and Morriston within the Rural System that are unserviced, however function as important service hubs to communities within Puslinch.
- Puslinch has active Rural Employment Areas which accommodate several of the County's largest employers.
- As summarized in Figure 6-7, Puslinch is anticipated to accommodate 8% of the County's employment growth over the forecast horizon. Since Puslinch lacks full municipal servicing (water/wastewater servicing), employment growth is relatively concentrated in Rural Employment Areas, and to a lesser extent the remaining rural area.
- Puslinch is anticipated to grow at annual employment growth rate of 1.0%, which is lower than the growth rate observed over the most recent 10-year Census period of 3.5% annually.
- Over the forecast horizon, Puslinch is anticipated to add over 2,000 Rural E.L.E. jobs, approximately 60 employees annually which is higher than the historical growth of 30 Rural E.L.E. employees annually over the 2006 to 2016.
- The existing Rural E.L.E. base in Puslinch is forecast to approximately double by 2051.

Wellington North

- The existing (2021) employment base of Wellington North comprises of 81% of the population within the Urban System and 19% of the employment in the Rural System. Unlike the Wellington North's population base, the employment base is more concentrated within the Urban System.
- As summarized in Figure 6-7, Wellington North is anticipated to accommodate 11% of the County's employment growth over the forecast horizon.
- Wellington North is anticipated to grow at annual employment growth rate of 1.1%, which is lower than the growth rate observed over the most recent 10-year Census period of 1.5% annually.



- It is anticipated that Wellington North will add 100 employees annually over the forecast horizon, which is less than the annual employment growth over the most recent 10-year census period of 190 employees annually.
- It is anticipated that the majority of employment growth will be concentrated in the Urban Centres comprising 56% Urban P.R.E. and 37% Urban E.L.E. The remaining employment growth is anticipated to be accommodated within the Rural System.

Minto

- Minto's existing population base as of 2021 comprises of 78% of the employment within the Urban System and 22% of the population in the Rural System.
- As summarized in Figure 6-7, Minto is anticipated to accommodate 8% of the County's employment growth over the forecast horizon.
- The annual employment growth rate of Minto is anticipated to increase by 1.4%, which is lower than the growth rate observed over the most recent 10-year Census period of 1.7% annually.
- As summarized in Figure 6-10, it is anticipated that Minto will add 70 employees annually over the forecast horizon.
- Employment growth is anticipated to include 54% Urban P.R.E. and 43% Urban E.L.E. The Rural System is anticipated to comprise the remaining 3% of the employment growth.

Mapleton

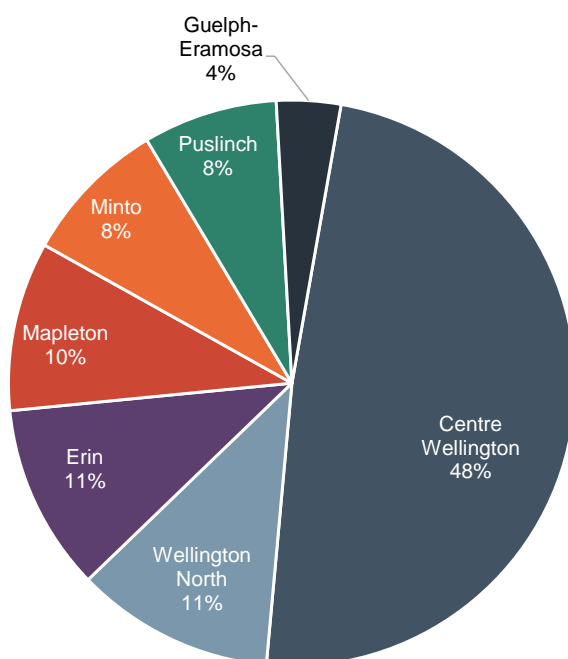
- The existing (2021) employment base of Mapleton comprises 51% of the population within the Urban System and 49% of the population in the Rural System. Compared to the other Area Municipalities, Mapleton's existing employment base is more oriented towards the Rural System.
- As summarized in Figure 6-7, Mapleton is anticipated to accommodate a 10% of the County's employment growth over the forecast horizon.
- The annual forecast employment growth rate of Mapleton is 1.5%, which is higher the growth rate observed over the most recent 10-year Census period of 0.9% annually.
- As summarized in Figure 6-10, it is anticipated that Mapleton will add 80 employees annually over the forecast horizon which is well above annual



employment growth levels experienced over the most recent 10-year Census period (70 employees annually).

- It is anticipated employment growth will comprise 53% Urban P.R.E. and 24% Urban E.L.E. A large portion of employment is forecast for the Rural System at 22% recognizing the importance of the rural employment base in Mapleton and consistent with employment trends observed.

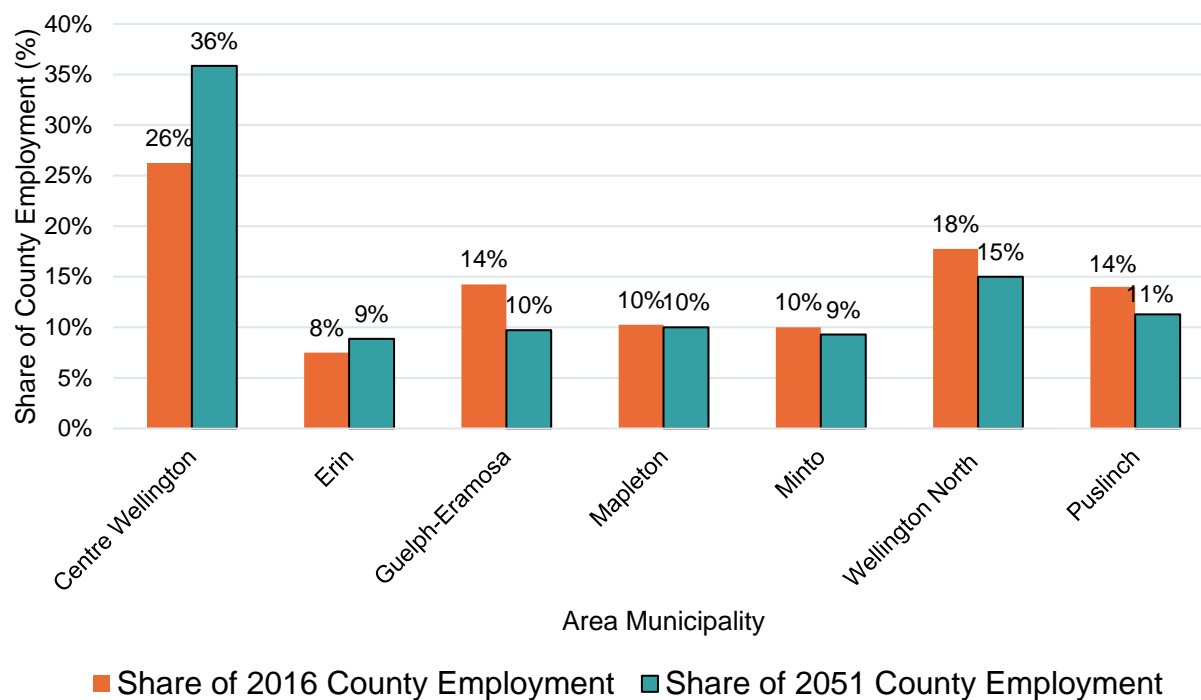
Figure 6-7
County of Wellington
Employment Growth Allocation by Area Municipality,
2016 to 2051



Source: Watson & Associates Economists Ltd.



Figure 6-8
County of Wellington
Share of Employment by Area Municipality
2016 and 2051



Source: Watson & Associates Economists Ltd.



Figure 6-9
County of Wellington
Forecast Annual Employment
Growth Rates, 2016 to 2051

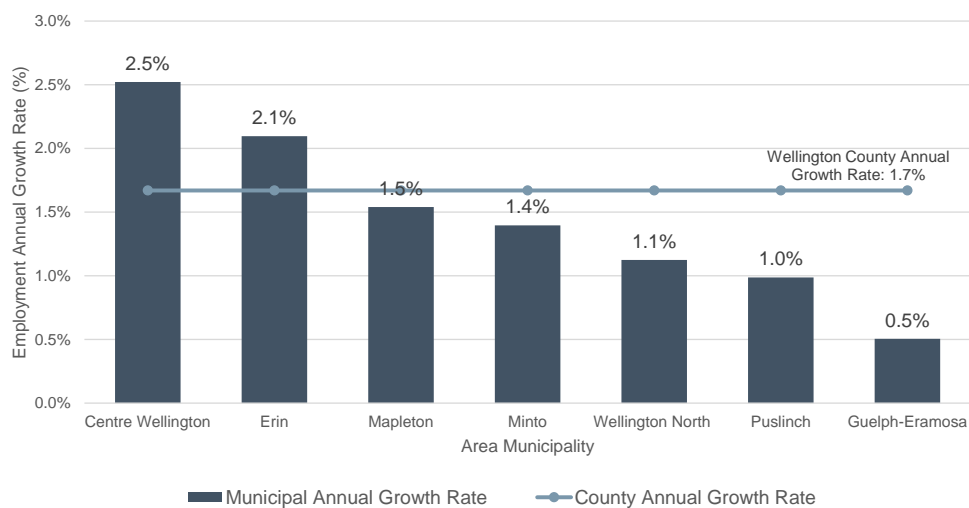
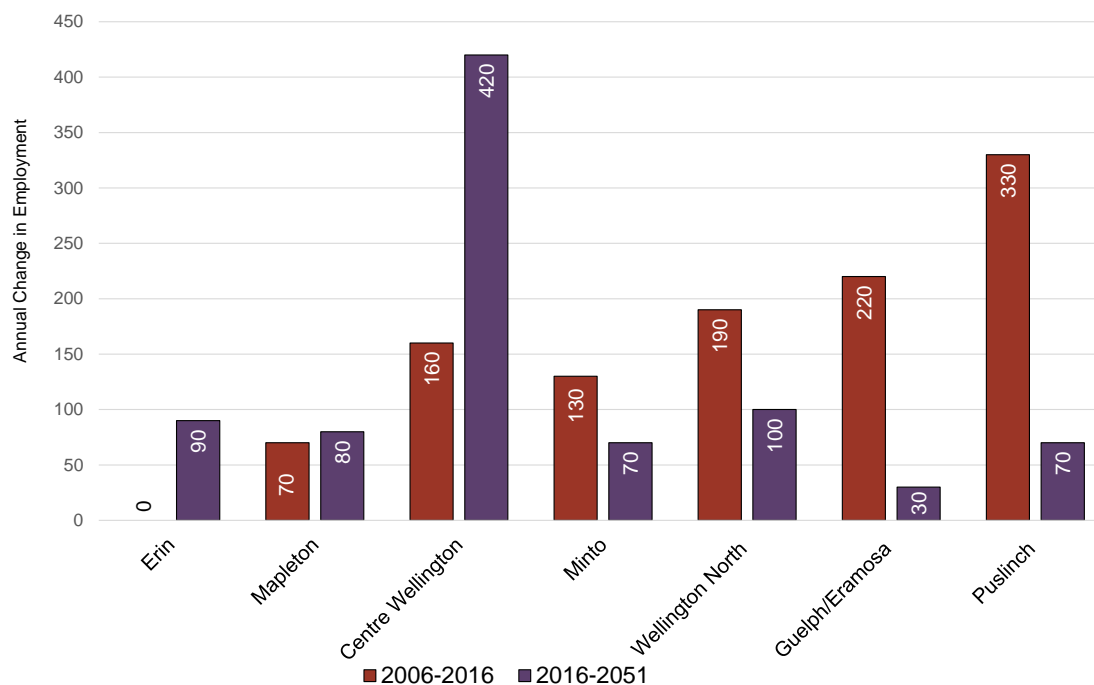




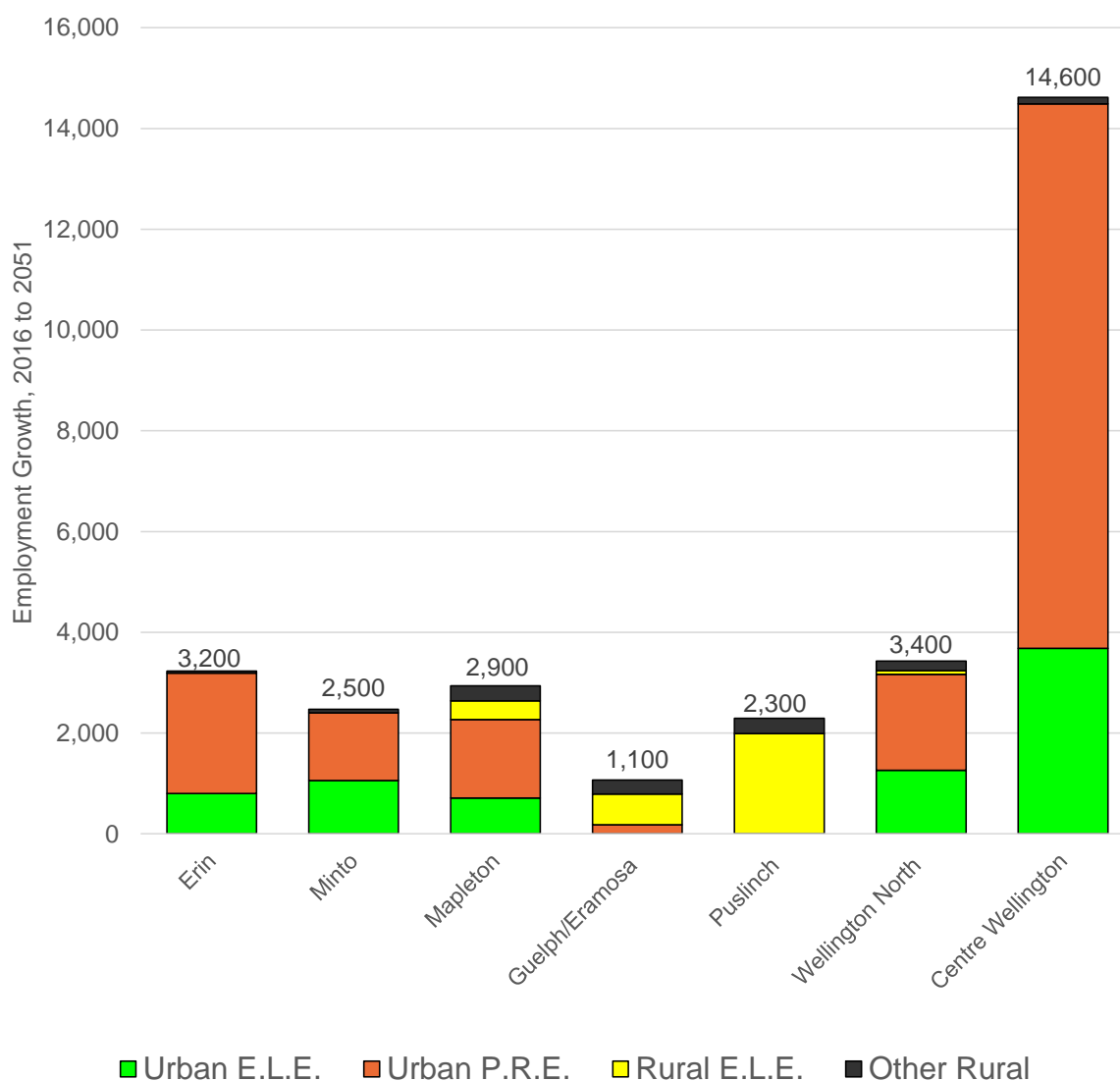
Figure 6-10
County of Wellington
Annual Employment Growth by Area Municipality
2016 to 2051



Source: Statistics Canada, Place of Work Employment by Watson & Associates Economists Ltd.



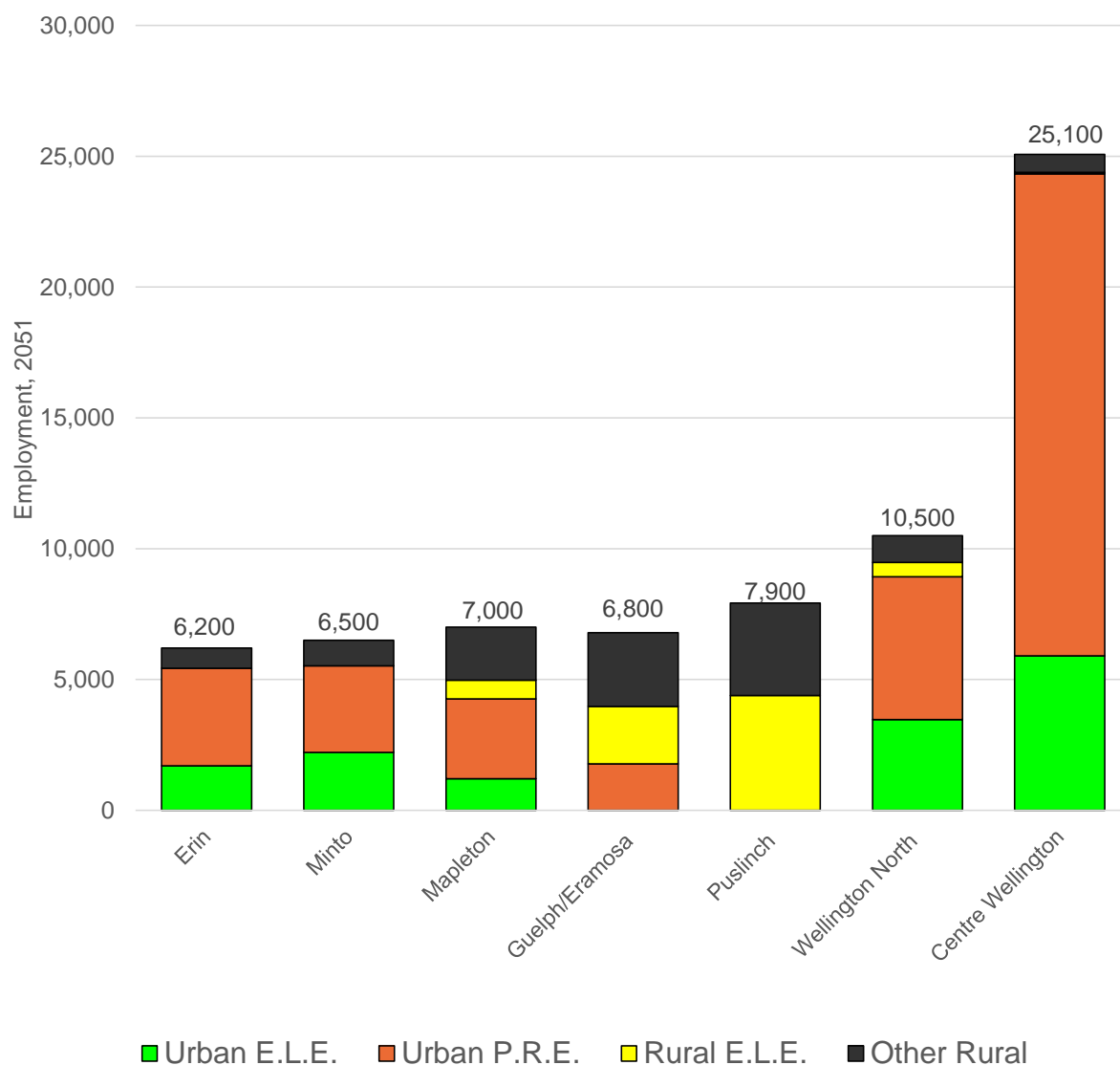
Figure 6-11
County of Wellington
Employment Category Growth by Area Municipality
2016 to 2051



Source: Watson & Associates Economists Ltd.



Figure 6-12
County of Wellington
Employment Category Forecast by Area Municipality, 2051



Source: Watson & Associates Economists Ltd.

6.4 Observations

The long-term economic outlook for the County and each of the Area Municipalities is very positive. As previously noted, as the local employment base and economy within



the surrounding commuter-shed continues to grow, the County of Wellington 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, particularly those that are located within the Toronto-Waterloo Innovation Corridor.¹ Raising the economic profile of the County of Wellington 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 of Wellington and its Area Municipalities. Achieving the County-wide employment forecast and allocations by Area Municipality 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 Wellington 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 County's attractiveness to older population segments.

¹ The Toronto-Waterloo Innovation Corridor, which includes the City of Guelph and Waterloo Region has strong economic and employment growth potential based on its established presence as the largest technology cluster in Canada, critical mass of post-secondary institutions and incubators, access to skilled labour, and a high quality of life. The Toronto-Waterloo Innovation Corridor is the second largest and second fastest growing market in North America related to technology talent, including over 200,000 tech workers and 15,000+ tech companies. The Toronto-Waterloo Innovation Corridor provides a key opportunity for Wellington County to leverage its growing local economy in the technology sector.



Chapter 7

Conclusions



7. Conclusions

7.1 Summary

Over the forecast horizon it is anticipated that all Area Municipalities within Wellington County will continue to experience strong population, housing and employment growth. As discussed in Chapter 3, it is anticipated that the outward growth trends from the G.T.H.A. to the Outer Ring will continue place urban development pressures on Wellington County.

By 2051, the County of Wellington total population base is forecast to grow to approximately 160,000 persons as per Schedule 3 of the Growth Plan, 2019. This represents an increase of approximately 66,400 residents between 2016 and 2051, or an average annual population growth rate of 1.5% during this time period. Accommodating forecast total population growth in the County of Wellington will require approximately 24,710 new households, or just over 710 new Census households annually over 2016 to 2051 (or 730 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 Wellington. As such, a higher long-term population forecast for the County of Wellington is not supported for the purposes of long-term growth management and urban land needs analysis.

The Urban Centres within the Township of Centre Wellington and the Town of Erin, are anticipated to accommodate a large portion of County's population and employment growth over the long-term planning horizon due to their proximity to the large employment markets of the G.G.H. These Urban Centres will play a role in broadening the housing options available within the County with respect to housing structure type. The remaining Area Municipalities are anticipated to add to their population and employment base at a rate generally higher than historical levels, where municipal water/wastewater servicing constraints have not been identified.

Over the forecast horizon, it is anticipated that the County will become increasingly become more urban. As of 2016, approximately 51% of the County's population is within the Urban System, while 49% of the County's population is within the Rural System. Looking forward, it is anticipated that by 2051, approximately 66% of the



County's population based will be concentrated within the Urban System which includes 12 Primary Urban Centres. Similar to the population base, employment growth is also anticipated to become increasingly more urban. This is anticipated to place increasing demands for infrastructure and municipal services which are able to support a larger, more diverse urban population base.

7.2 Recommendations

The following Phase 1 M.C.R. recommendations are provided regarding the County's proposed urban structure and population, household and employment forecast to 2051.

Urban and Rural System

- The County should provide a distinction of the Urban and Rural System based on serving (water and wastewater) and where the majority of the growth is to be allocated in accordance with the Growth Plan, 2019 policies. It is recommended that the Urban System be defined based on existing/planned full servicing, while the remaining be classified as the Rural System.
- Urban Centres with no full servicing which include Aberfoyle and Morriston are recommended to be referred to as Secondary Urban Centres within the Rural System and identified as priority settlement areas within the Rural System given importance of these settlement areas as community hubs.
- All Urban Centres (12 in total) with existing/planned full municipal servicing are recommended to be referred to as Primary Urban Centres.
- The County should consider modifying the Employment Area definition in the County's O.P. to include only areas identified in the O.P. as Industrial and Rural Employment Areas (i.e. exclude Highway Commercial), lands identified in provincially policies for protection to non-employment uses.

County-Wide Forecast

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



Growth Allocations to 2051

- It is recommended that the County adopt the growth allocations by Area Municipality to 2051. Area Municipalities may elect to make further refinements to the rate of population and employment growth within the 2021 to 2051 planning horizon.
- It is further recommended that the County and Area Municipalities, which have an identified Urban System, plan for a steady shift in their population and employment base towards urban development.
- While growth allocations have been provided by Urban Centre, these forecasts are provided for guidance and for planning purposes at the local municipal level. Area Municipalities may elect to make further refinements within their Urban System to reflect changes in local conditions, servicing and timing of development.

7.3 Next Steps

This report will form an important component in supporting the analysis in the Phase 2 Report which is scheduled for completion by Fall 2021. The Phase 2 Report - Land Needs Assessment & Policy Considerations will include the technical growth management requirements of the M.C.R. The Phase 2 Report will conclude on the urban land requirements for the County's Urban System (D.G.A. Community Area and Urban Employment), as well as provide further recommendations in accommodating growth in the Urban and Rural System.

Key components of this Phase 2 report will include:

- A review of intensification opportunities and challenges in meeting the County's existing target of 20% of annual housing growth within the B.U.A. and a recommendation on the County intensification target;
- An assessment of the D.G.A. density target of 40 people and jobs/gross ha and recommendation on the County target;
- An Employment Area density target for the O.P.;
- Land requirements for D.G.A. Community Area and Employment Areas within the Urban System; and



- Planning policy considerations with respect to planning for growth and growth management.

Refer to January 31, 2022 Addendum Report for revisions to this Report.



Appendix A

Wellington County Housing Headship Rates, 2016 to 2051



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

Figure A-1: County of Wellington, 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	0.0463	0.0506	0.0409	0.0409	0.0409	0.0409	0.0409	0.0409	0.0409	0.0409
25-34	0.3804	0.3688	0.3588	0.3588	0.3588	0.3588	0.3588	0.3588	0.3588	0.3588
35-44	0.4749	0.4760	0.4778	0.4778	0.4778	0.4778	0.4778	0.4778	0.4778	0.4778
45-54	0.5218	0.5161	0.5083	0.5083	0.5083	0.5083	0.5083	0.5083	0.5083	0.5083
55-64	0.5385	0.5433	0.5510	0.5510	0.5510	0.5510	0.5510	0.5510	0.5510	0.5510
65-74	0.5834	0.5637	0.5516	0.5516	0.5516	0.5516	0.5516	0.5516	0.5516	0.5516
75+	0.5675	0.5581	0.5838	0.5838	0.5838	0.5838	0.5838	0.5838	0.5838	0.5838
Total	0.3389	0.3475	0.3548	0.3579	0.3585	0.3592	0.3593	0.3591	0.3606	0.3620

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



Appendix B

Flatlined Age-Specific Propensity Analysis



Appendix B-1: Wellington County Flatlined Age-Specific Propensity Analysis

Figure B-1: Wellington County, Flatlined Age-Specific Propensity Housing Forecast

Age Group & Housing Type	2016 Census Flatlined Propensity	Total Households								2016 to 2051 Incremental Growth	
		2016	2021	2026	2031	2036	2041	2046	2051	Total Households	Propensity Rate
15-24	Total	495	495	525	635	720	755	745	785	290	100%
Low Density	61%	301	301	319	386	438	459	453	477	176	61%
Medium Density	8%	39	39	41	50	56	59	58	62	23	8%
High Density	31%	155	155	165	199	226	237	234	246	91	31%
25-34	Total	3,475	3,502	3,805	4,385	5,260	6,395	7,355	7,710	4,235	100%
Low Density	83%	2,868	2,891	3,141	3,620	4,342	5,279	6,071	6,364	3,496	83%
Medium Density	6%	194	195	212	245	293	357	410	430	236	6%
High Density	12%	413	416	452	521	625	759	873	915	503	12%
35-44	Total	5,030	5,153	5,605	5,760	6,120	6,805	7,930	9,470	4,440	100%
Low Density	90%	4,550	4,661	5,070	5,210	5,536	6,156	7,173	8,566	4,016	90%
Medium Density	3%	170	174	189	195	207	230	268	320	150	3%
High Density	6%	310	318	345	355	377	419	489	584	274	6%
45-54	Total	7,205	6,723	6,960	7,520	8,000	8,105	8,485	9,315	2,110	100%
Low Density	91%	6,535	6,098	6,312	6,820	7,256	7,351	7,695	8,448	1,914	91%
Medium Density	3%	235	219	227	245	261	265	277	304	69	3%
High Density	6%	435	406	421	454	483	490	513	563	127	6%
55-64	Total	7,585	8,559	8,535	8,275	8,460	8,935	9,360	9,470	1,885	100%
Low Density	89%	6,776	7,647	7,625	7,392	7,558	7,982	8,362	8,460	1,684	89%
Medium Density	4%	290	327	326	316	323	341	357	362	72	4%
High Density	7%	519	586	584	567	579	612	641	648	129	7%
65-74	Total	5,285	6,398	7,505	8,490	8,355	7,970	7,995	8,320	3,035	100%
Low Density	86%	4,544	5,501	6,452	7,299	7,183	6,852	6,873	7,153	2,609	86%
Medium Density	4%	205	249	292	330	325	310	311	323	118	4%
High Density	10%	536	649	761	861	847	808	811	844	308	10%
75+	Total	4,110	5,228	6,950	8,760	10,580	12,040	12,610	12,855	8,745	100%
Low Density	79%	3,257	4,143	5,507	6,942	8,384	9,541	9,993	10,187	6,930	79%
Medium Density	6%	246	313	416	524	633	720	754	769	523	6%
High Density	15%	607	772	1,027	1,294	1,563	1,779	1,863	1,899	1,292	15%
Wellington County Total	Total	33,185	36,059	39,885	43,825	47,495	51,005	54,480	57,925	24,740	100%
Low Density	87%	28,830	31,240	34,427	37,669	40,696	43,619	46,621	49,656	20,825	84%
Medium Density	4%	1,379	1,516	1,703	1,905	2,099	2,282	2,436	2,570	1,191	5%
High Density	9%	2,976	3,302	3,755	4,251	4,701	5,104	5,423	5,700	2,724	11%

Note: Forecast presented in this table is based on 2016 Statistics Canada Census flatlined age-specific propensity rates. The housing forecast by structure type which informs the MCR and LNA has been adjusted to account for near-term demand identified and the active residential development pipeline, housing affordability and planning policy.

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

The above figure is based on the propensity analysis as discussed in section 3.3.2.3.

The propensity analysis is not the preferred housing. The County-wide housing forecast is provided in the Appendix C



Appendix C

Wellington County Population and Housing Forecast



Appendix C-1: County of Wellington, 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	84,600	81,145	1,418	79,727	23,915	1,150	2,260	420	27,745	3.05
	Mid-2006	88,500	85,470	1,222	84,248	25,795	1,075	2,570	575	30,015	2.95
	Mid-2011	89,100	86,675	1,342	85,333	26,200	1,230	2,565	965	30,960	2.88
	Mid-2016	93,500	90,955	1,597	89,358	28,275	1,385	3,000	535	33,195	2.82
Forecast	Mid-2021	100,800	97,883	1,719	96,164	30,223	1,884	3,417	535	36,059	2.80
	Mid-2026	111,300	108,079	1,898	106,182	33,092	2,381	3,876	535	39,884	2.79
	Mid-2031	122,000	118,470	2,080	116,390	36,047	2,893	4,349	535	43,824	2.78
	Mid-2036	132,200	128,374	2,254	126,120	38,616	3,554	4,789	535	47,494	2.78
	Mid-2041	142,000	137,891	2,421	135,470	40,897	4,256	5,316	535	51,004	2.78
	Mid-2046	151,100	146,728	2,576	144,151	42,982	5,021	5,941	535	54,479	2.77
	Mid-2051	160,000	155,370	2,728	152,642	44,877	5,847	6,665	535	57,924	2.76
Incremental	Mid-2001 to Mid-2006	3,900	4,325	-196	4,521	1,880	-75	310	155	2,270	
	Mid-2006 to Mid-2011	600	5,530	-76	1,085	405	155	-5	390	945	
	Mid-2011 to Mid-2016	4,400	4,280	255	4,025	2,075	155	435	-430	2,235	
	Mid-2016 to Mid-2021	7,300	6,928	122	6,806	1,948	499	417	0	2,864	
	Mid-2016 to Mid-2031	28,500	27,515	483	27,032	7,772	1,508	1,349	0	10,629	
	Mid-2016 to Mid-2041	48,500	46,936	824	46,112	12,622	2,871	2,316	0	17,809	
	Mid-2016 to Mid-2051	66,500	64,415	1,131	63,284	16,602	4,462	3,665	0	24,729	

Source: Watson & Associates Economists Ltd., 2021.

¹ Census undercount estimated at approximately 3%. Note: Population including the undercount has been rounded.

² Includes townhouses and apartments in duplexes.

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



Appendix C-2: Wellington County Population Forecast by Age Group

Figure C-2a: Wellington County, Total Population Forecast by Major Age Group, 2016 to 2051

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	25,200	24,600	23,300	23,000	25,100	28,200	30,200	31,600	33,100	34,600	36,400
20-34	14,200	14,400	14,000	15,400	15,600	16,700	19,600	23,400	27,500	30,100	31,200
35-44	14,500	13,500	10,900	10,500	10,800	11,700	12,100	12,800	14,200	16,600	19,800
45-54	12,200	13,900	15,200	14,200	13,200	13,700	14,800	15,700	15,900	16,700	18,300
55-64	8,100	10,300	12,000	13,800	15,500	15,500	15,000	15,400	16,200	17,000	17,200
65-74	5,900	6,500	7,600	9,600	11,600	13,600	15,400	15,100	14,400	14,500	15,100
75+	4,400	5,300	6,000	7,000	8,900	11,900	15,000	18,100	20,600	21,600	22,000
Total	84,600	88,500	89,100	93,500	100,800	111,300	122,000	132,200	142,000	151,100	160,000

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

¹ Forecast net population undercount estimated at approximately 3.0%

Note: Figures may not add precisely due to rounding.

Figure C-2b: Wellington County, 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	30%	28%	26%	25%	25%	25%	25%	24%	23%	22.9%	22.7%
20-34	17%	16%	16%	16%	15%	15%	16%	18%	19%	19.9%	19.5%
35-44	17%	15%	12%	11%	11%	11%	10%	10%	10%	11.0%	12.4%
45-54	14%	16%	17%	15%	13%	12%	12%	12%	11%	11.0%	11.5%
55-64	10%	12%	13%	15%	15%	14%	12%	12%	11%	11.2%	10.7%
65-74	7%	7%	9%	10%	12%	12%	13%	11%	10%	9.6%	9.4%
75+	5%	6%	7%	8%	9%	11%	12%	14%	15%	14.3%	13.8%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100.0%	100.0%

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

¹ Forecast net population undercount estimated at approximately 3.0%

Note: Figures may not add precisely due to rounding.



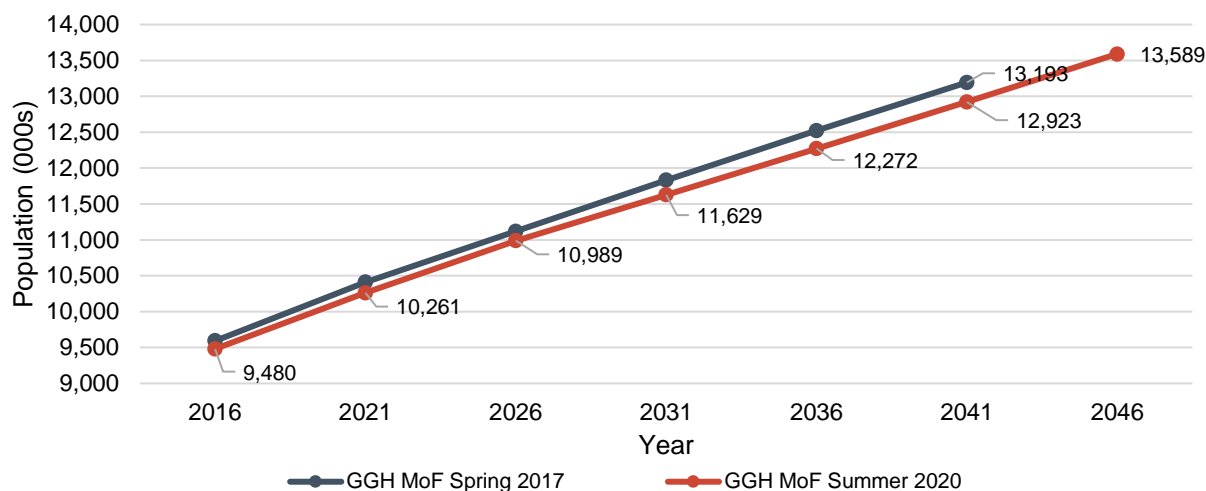
Appendix D

Ministry of Finance Population Projections



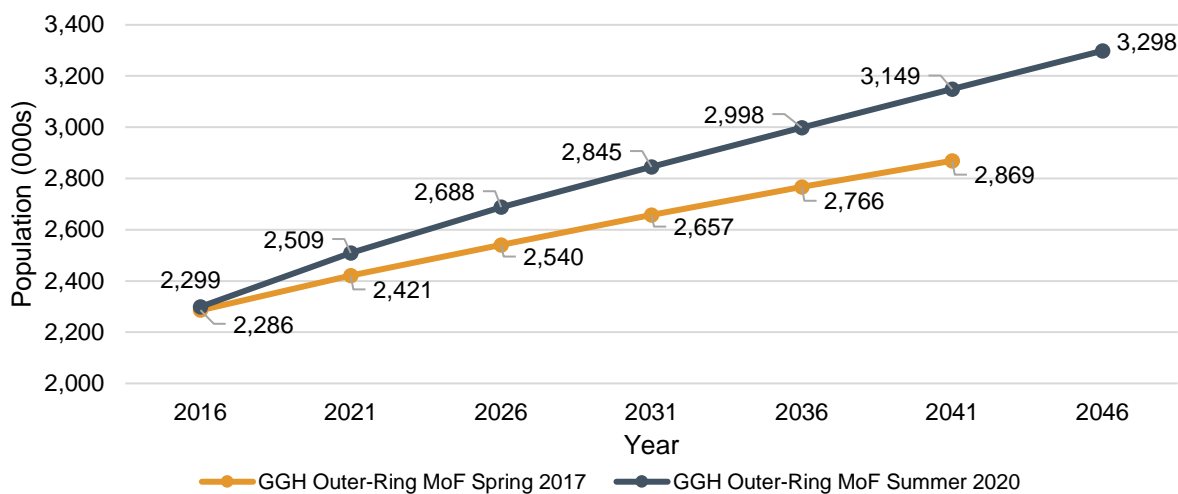
Appendix D: Ministry of Finance Population Projections

Figure D-1: Ministry of Finance G.G.H. Population Projections



Source: Derived from Ministry of Finance Ontario Population Projections Spring 2017 and Summer 2020 releases, by Watson & Associates Economists Ltd.

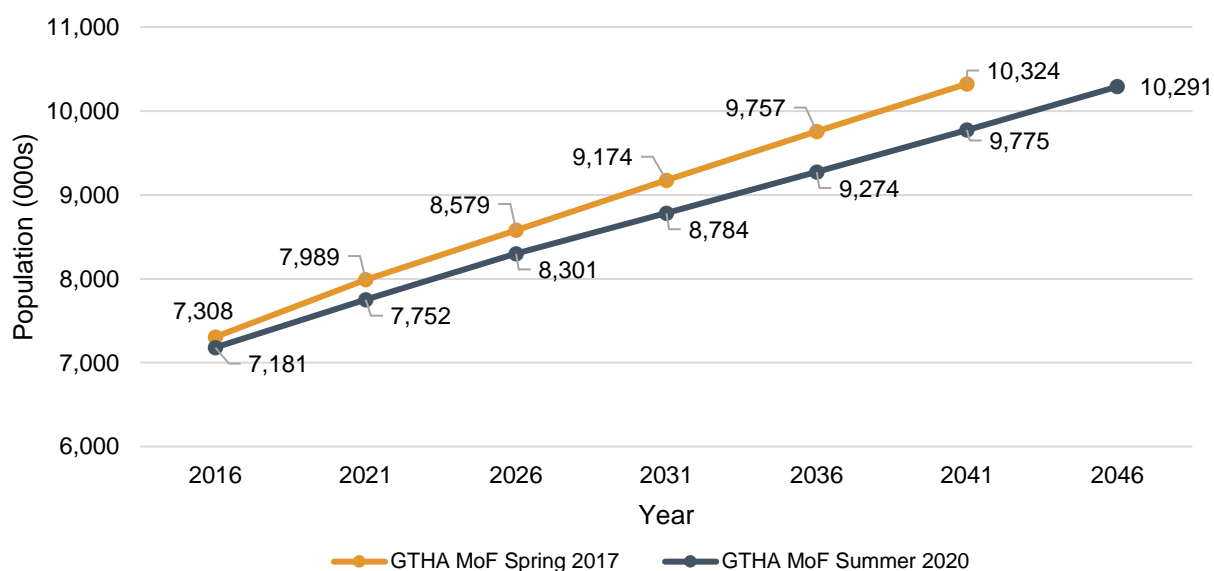
Figure D-2: Ministry of Finance G.G.H. Outer Ring Population Projections



Source: Derived from Ministry of Finance Ontario Population Projections Spring 2017 and Summer 2020 releases by Watson & Associates Economists Ltd.

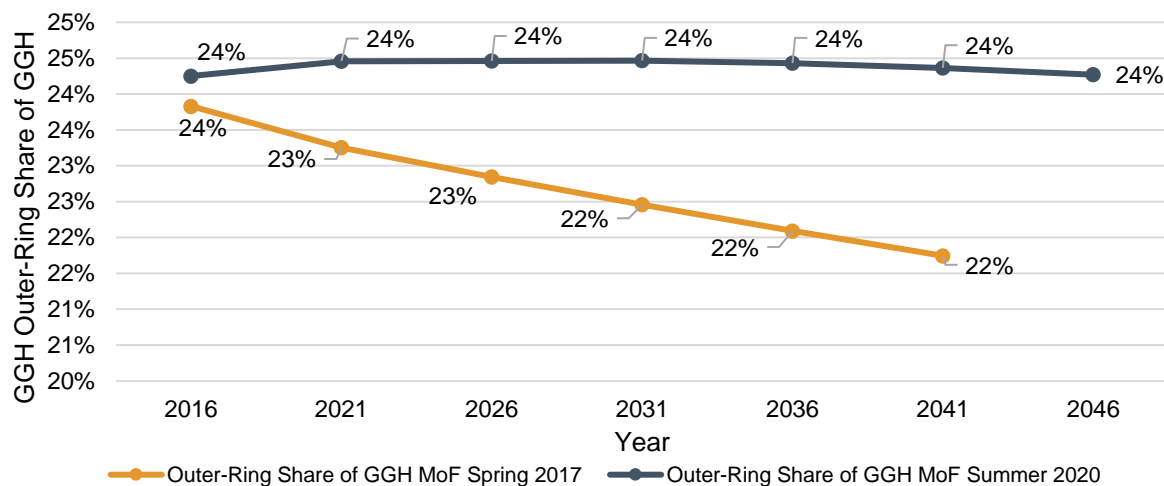


Figure D-3: Ministry of Finance GTHA Population Projections



Source: Derived from Ministry of Finance Ontario Population Projections Spring 2017 and Summer 2020 releases, by Watson & Associates Economists Ltd.

Figure D-4: Ministry of Finance G.G.H. Outer Ring Population Projections



Source: Derived from Ministry of Finance Ontario Population Projections Spring 2017 and Summer 2020 releases, by Watson & Associates Economists Ltd.



Appendix E

Growth Allocations: Population and Growth



Appendix E-1 – Population, Housing and Employment Forecasts by Area Municipality



Figure E-1, Table 1
County of Wellington
Population and Housing Forecast
2016 to 2051

Year		Population (Including Census undercount) ¹	Housing Units					Persons Per Unit (P.P.U.) with undercount
			Singles & Semi- Detached	Multiple Dwellings ²	Apartments ³	Other	Total Households	
Historical	Mid-2001	84,600	23,915	1,150	2,260	420	27,745	3.05
	Mid-2006	88,500	25,795	1,075	2,570	575	30,015	2.95
	Mid-2011	89,100	26,200	1,230	2,565	965	30,960	2.88
	Mid-2016	93,500	28,275	1,385	3,000	535	33,195	2.82
Forecast	Mid-2021	100,800	30,223	1,884	3,417	535	36,059	2.80
	Mid-2026	111,300	33,092	2,381	3,876	535	39,884	2.79
	Mid-2031	122,000	36,047	2,893	4,349	535	43,824	2.78
	Mid-2036	132,200	38,616	3,554	4,789	535	47,494	2.78
	Mid-2041	142,000	40,897	4,256	5,316	535	51,004	2.78
	Mid-2046	151,100	42,982	5,021	5,941	535	54,479	2.77
	Mid-2051	160,000	44,877	5,847	6,665	535	57,924	2.76
Growth	2001 - 2016	8,900	4,360	235	740	115	5,450	
	2016 - 2041	48,500	12,622	2,871	2,316	0	17,809	
	2016 - 2051	66,500	16,602	4,462	3,665	0	24,729	
	Annual Growth, 2001 - 2016	0.7%	1.1%	1.2%	1.9%	1.6%	1.2%	
	Annual Growth, 2016 - 2041	1.7%	1.5%	4.6%	2.3%	0.0%	1.7%	
	Annual Growth, 2016 - 2051	1.5%	1.3%	4.2%	2.3%	0.0%	1.6%	

Source: Watson & Associates Economists Ltd., 2020.

Note: Figures may not add precisely due to rounding.

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached homes as well as "other" detached homes as per Statistics Canada.

³ Includes all townhouses and apartments in duplex.

⁴ Includes all apartments with less than or greater than five storeys



Figure E-1, Table 2a
County of Wellington
Population, Housing and Employment, 2016 to 2051

Area Municipality	Forecast Period	Total Population with Undercount ¹	Total Residential Units	Persons Per Units (PPU)	Total Urban Settlement Population	Total Urban Settlement Area Residential Units	Total Employment (including NPOW)	Employment Activity Rate ¹
Centre Wellington	2016	29,000	10,870	2.67	21,800	8,350	10,460	36.1%
	2021	33,300	12,810	2.60	26,900	10,270	12,280	36.9%
	2031	42,500	15,770	2.69	35,000	13,140	16,240	38.2%
	2041	52,300	19,360	2.70	44,700	16,650	21,280	40.7%
	2051	58,900	22,400	2.63	51,100	19,620	25,080	42.6%
	2016 - 2051	29,900	11,530		29,300	11,270	14,620	48.9%
Erin	2016	11,800	4,120	2.86	4,400	1,570	2,980	25.3%
	2021	12,000	4,230	2.84	4,500	1,610	3,140	26.2%
	2031	16,700	5,970	2.80	8,600	3,120	4,090	24.5%
	2041	20,200	7,280	2.77	11,500	4,250	5,290	26.2%
	2051	26,300	9,200	2.86	16,800	5,950	6,210	23.6%
	2016 - 2051	14,500	5,080		12,400	4,380	3,230	22.3%
Guelph-Eramosa	2016	13,200	4,500	2.93	4,900	1,730	5,720	43.3%
	2021	13,600	4,650	2.92	5,200	1,880	5,990	44.0%
	2031	14,100	4,870	2.90	5,600	2,060	6,180	43.8%
	2041	14,600	5,020	2.91	5,900	2,160	6,330	43.4%
	2051	14,700	5,110	2.88	5,800	2,180	6,790	46.2%
	2016 - 2051	1,500	610		900	450	1,070	71.3%
Puslinch	2016	7,600	2,710	2.80	0	0	5,630	74.1%
	2021	7,900	2,850	2.77	0	0	5,820	73.7%
	2031	8,400	3,020	2.78	0	0	6,310	75.1%
	2041	9,700	3,450	2.81	0	0	6,990	72.1%
	2051	10,000	3,560	2.81	0	0	7,920	79.2%
	2016 - 2051	2,400	850		0	0	2,290	95.4%
County of Wellington	2016	93,600	33,280	2.81	47,500	18,060	39,960	42.7%
	2021	99,900	36,060	2.77	53,800	20,510	43,100	43.1%
	2031	122,100	43,820	2.79	72,700	27,350	51,150	41.9%
	2041	142,000	51,010	2.78	90,000	33,620	61,060	43.0%
	2051	160,000	57,930	2.76	105,800	39,840	70,010	43.8%
	2016 - 2051	66,400	24,650		58,300	21,780	30,050	45.3%

Source: Watson & Associates Economists Ltd.

¹Includes population undercount at approximately 3%. Figures have been rounded and may not add up precisely.

²Urban settlement areas include all urban areas within the County of Wellington with a delineated Growth Plan built boundary by the province.



Figure E-1, Table 2b
County of Wellington
Population, Housing and Employment, 2016 to 2051

Area Municipality	Forecast Period	Total Population with Undercount ¹	Total Residential Units	Persons Per Units (PPU)	Total Urban Settlement Population	Total Urban Settlement Area Residential Units	Total Employment (including NPOW)	Employment Activity Rate ¹
Mapleton	2016	10,800	3,150	3.43	2,800	980	4,060	37.6%
	2021	11,100	3,260	3.40	2,900	1,020	4,430	39.9%
	2031	12,400	3,780	3.28	3,800	1,370	5,240	42.3%
	2041	14,100	4,380	3.22	5,400	1,940	6,190	43.9%
	2051	14,400	4,540	3.17	5,700	2,080	7,000	48.6%
	2016 - 2051	3,600	1,390		2,900	1,100	2,940	81.7%
Minto	2016	8,900	3,260	2.73	5,800	2,220	4,030	45.3%
	2021	9,300	3,400	2.74	6,100	2,360	4,170	44.8%
	2031	11,900	4,280	2.78	8,200	3,070	4,750	39.9%
	2041	13,400	4,820	2.78	9,500	3,520	5,530	41.3%
	2051	15,200	5,460	2.78	11,000	4,070	6,510	42.8%
	2016 - 2051	6,300	2,200		5,200	1,850	2,480	39.4%
Wellington North	2016	12,300	4,670	2.63	7,800	3,210	7,080	57.6%
	2021	12,700	4,860	2.61	8,200	3,370	7,270	57.2%
	2031	16,100	6,130	2.63	11,500	4,590	8,340	51.8%
	2041	17,700	6,700	2.64	13,000	5,100	9,450	53.4%
	2051	20,500	7,660	2.68	15,400	5,940	10,500	51.2%
	2016 - 2051	8,200	2,990		7,600	2,730	3,420	41.7%
County of Wellington	2016	93,600	33,280	2.81	47,500	18,060	39,960	42.7%
	2021	99,900	36,060	2.77	53,800	20,510	43,100	43.1%
	2031	122,100	43,820	2.79	72,700	27,350	51,150	41.9%
	2041	142,000	51,010	2.78	90,000	33,620	61,060	43.0%
	2051	160,000	57,930	2.76	105,800	39,840	70,010	43.8%
	2016 - 2051	66,400	24,650		58,300	21,780	30,050	45.3%

Source: Watson & Associates Economists Ltd.

¹Includes population undercount at approximately 3%. Figures have been rounded and may not add up precisely.

²Urban settlement areas include all urban areas within the County of Wellington with a delineated Growth Plan built boundary by the province.



Figure E-1, Table 3a
County of Wellington
Housing Forecast by Municipality, 2016 to 2051

Area Municipality	Forecast Period	Singles/Semi-Detached	Townhomes	Apartments	Others	Total Residential Units
Centre Wellington	2016	8,500	680	1,530	160	10,870
	2021	9,740	1,030	1,880	160	12,810
	2031	11,900	1,360	2,350	160	15,770
	2041	14,340	2,160	2,700	160	19,360
	2051	15,430	3,220	3,590	160	22,400
	2016 - 2051	6,930	2,540	2,060	0	11,530
Erin	2016	3,810	40	120	150	4,120
	2021	3,910	40	130	150	4,230
	2031	5,240	340	240	150	5,970
	2041	5,920	550	660	150	7,280
	2051	7,440	730	880	150	9,200
	2016 - 2051	3,630	690	760	0	5,080
Guelph-Eramosa	2016	4,100	240	130	30	4,500
	2021	4,240	250	130	30	4,650
	2031	4,440	260	140	30	4,870
	2041	4,570	270	150	30	5,020
	2051	4,600	280	200	30	5,110
	2016 - 2051	500	40	70	0	610
Puslinch	2016	2,560	40	20	90	2,710
	2021	2,700	40	20	90	2,850
	2031	2,870	40	20	90	3,020
	2041	3,300	40	20	90	3,450
	2051	3,410	40	20	90	3,560
	2016 - 2051	850	0	0	0	850

Note: May not add up precisely due to rounding.
Source: Watson & Associates Economists Ltd.

¹Includes population undercount at approximately 3%. Figures have been rounded and may not add up precisely.

²Urban settlement areas include all urban areas within the County of Wellington with a delineated Growth Plan built boundary by the province.



Appendix E-1, Tab 3b (Continued)
County of Wellington
Housing Forecast by Municipality, 2016 to 2051

Area Municipality	Forecast Period	Singles/Semi-Detached	Townhomes	Apartments	Others	Total Residential Units
Mapleton	2016	2,920	50	110	70	3,150
	2021	3,020	50	120	70	3,260
	2031	3,380	150	180	70	3,780
	2041	3,820	240	250	70	4,380
	2051	3,910	270	290	70	4,540
	2016 - 2051	990	220	180	0	1,390
Minto	2016	2,760	110	370	20	3,260
	2021	2,830	150	400	20	3,400
	2031	3,570	240	450	20	4,280
	2041	3,920	370	510	20	4,820
	2051	4,330	520	590	20	5,460
	2016 - 2051	1,570	410	220	0	2,200
Wellington North	2016	3,660	260	730	20	4,670
	2021	3,780	330	730	20	4,860
	2031	4,640	500	970	20	6,130
	2041	5,020	630	1,030	20	6,700
	2051	5,760	790	1,090	20	7,660
	2016 - 2051	2,100	530	360	0	2,990
County of Wellington	2016	28,310	1,420	3,010	540	33,280
	2021	30,220	1,890	3,410	540	36,060
	2031	36,040	2,890	4,350	540	43,820
	2041	40,890	4,260	5,320	540	51,010
	2051	44,880	5,850	6,660	540	57,930
	2016 - 2051	16,570	4,430	3,650	0	24,650

Note: May not add up precisely due to rounding.
Source: Watson & Associates Economists Ltd.



Appendix E-2 – Detailed Population and Housing Forecasts by Area Municipality



Appendix E-2, Table 1
Township of Centre Wellington
Population and Housing Forecast, 2016 to 2051

Centre Wellington								
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	28,200	29,000	8,500	680	1,530	160	10,870	2.668
2021	33,100	34,100	9,740	1,030	1,880	160	12,810	2.662
2026	37,200	38,300	10,840	1,290	2,080	160	14,370	2.665
2031	41,200	42,500	11,900	1,360	2,350	160	15,770	2.695
2036	46,000	47,400	13,160	1,730	2,520	160	17,570	2.698
2041	50,800	52,300	14,340	2,160	2,700	160	19,360	2.701
2046	53,600	55,200	14,790	2,680	3,180	160	20,810	2.653
2051	57,200	58,900	15,430	3,220	3,590	160	22,400	2.629
2016 - 2041	22,600	23,300	5,840	1,480	1,170	-	8,490	
2016 - 2051	29,000	29,900	6,930	2,540	2,060	-	11,530	

Appendix E-2, Table 2
Town of Erin
Population and Housing Forecast, 2016 to 2051

Erin								
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	11,400	11,800	3,810	40	120	150	4,120	2.864
2021	11,700	12,000	3,910	40	130	150	4,230	2.837
2026	13,200	13,600	4,370	70	180	150	4,770	2.851
2031	16,200	16,700	5,240	340	240	150	5,970	2.797
2036	17,900	18,400	5,590	450	430	150	6,620	2.779
2041	19,600	20,200	5,920	550	660	150	7,280	2.775
2046	22,700	23,300	6,760	590	680	150	8,180	2.848
2051	25,500	26,300	7,440	730	880	150	9,200	2.859
2016 - 2041	8,200	8,400	2,110	510	540	-	3,160	
2016 - 2051	14,100	14,500	3,630	690	760	-	5,080	



Appendix E-2, Table 3
Township of Guelph-Eramosa
Population and Housing Forecast, 2016 to 2051

Guelph/Eramosa								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	12,900	13,200	4,100	240	130	30	4,500	2.933
2021	13,200	13,600	4,240	250	130	30	4,650	2.925
2026	13,600	14,000	4,380	250	140	30	4,800	2.917
2031	13,700	14,100	4,440	260	140	30	4,870	2.895
2036	13,900	14,300	4,500	270	150	30	4,950	2.889
2041	14,200	14,600	4,570	270	150	30	5,020	2.908
2046	14,200	14,600	4,570	280	180	30	5,060	2.885
2051	14,300	14,700	4,600	280	200	30	5,110	2.877
2016 - 2041	1,300	1,400	470	30	20	-	520	
2016 - 2051	1,400	1,500	500	40	70	-	610	

Appendix E-2, Table 4
Township of Mapleton
Population and Housing Forecast, 2016 to 2051

Mapleton								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	10,500	10,800	2,920	50	110	70	3,150	3.429
2021	10,800	11,100	3,020	50	120	70	3,260	3.405
2026	11,400	11,800	3,200	110	150	70	3,530	3.343
2031	12,000	12,400	3,380	150	180	70	3,780	3.280
2036	12,500	12,900	3,540	150	200	70	3,960	3.258
2041	13,700	14,100	3,820	240	250	70	4,380	3.219
2046	13,700	14,200	3,870	230	260	70	4,430	3.205
2051	14,000	14,400	3,910	270	290	70	4,540	3.172
2016 - 2041	3,200	3,300	900	190	140	-	1,230	
2016 - 2051	3,500	3,600	990	220	180	-	1,390	



Appendix E-2, Table 5
Town of Minto
Population and Housing Forecast, 2016 to 2051

Minto								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	8,700	8,900	2,760	110	370	20	3,260	2.730
2021	9,000	9,300	2,830	150	400	20	3,400	2.735
2026	10,300	10,600	3,210	200	420	20	3,850	2.753
2031	11,500	11,900	3,570	240	450	20	4,280	2.780
2036	12,600	12,900	3,840	310	480	20	4,650	2.774
2041	13,000	13,400	3,920	370	510	20	4,820	2.780
2046	13,800	14,200	4,110	440	550	20	5,120	2.773
2051	14,800	15,200	4,330	520	590	20	5,460	2.784
2016 - 2041	4,300	4,500	1,160	260	140	-	1,560	
2016 - 2051	6,100	6,300	1,570	410	220	-	2,200	

Appendix E-2, Table 6
Township of Wellington North
Population and Housing Forecast, 2016 to 2051

Wellington North								
Year	Population (Excluding Census)	Population (Including Census)	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	11,900	12,300	3,660	260	730	20	4,670	2.634
2021	12,400	12,700	3,780	330	730	20	4,860	2.613
2026	14,200	14,700	4,260	420	880	20	5,580	2.634
2031	15,600	16,100	4,640	500	970	20	6,130	2.626
2036	16,900	17,400	4,960	610	990	20	6,580	2.644
2041	17,200	17,700	5,020	630	1,030	20	6,700	2.642
2046	19,100	19,600	5,520	760	1,080	20	7,380	2.656
2051	19,900	20,500	5,760	790	1,090	20	7,660	2.676
2016 - 2041	5,300	5,400	1,360	370	300	-	2,030	
2016 - 2051	8,000	8,200	2,100	530	360	-	2,990	



Appendix E-2, Table 7
Township of Puslinch
Population and Housing Forecast, 2016 to 2051

Puslinch								
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	7,300	7,600	2,560	40	20	90	2,710	2.804
2021	7,700	7,900	2,700	40	20	90	2,850	2.772
2026	8,000	8,300	2,820	40	20	90	2,970	2.795
2031	8,100	8,400	2,870	40	20	90	3,020	2.781
2036	8,600	8,800	3,020	40	20	90	3,170	2.776
2041	9,400	9,700	3,300	40	20	90	3,450	2.812
2046	9,600	9,900	3,360	40	20	90	3,510	2.821
2051	9,700	10,000	3,410	40	20	90	3,560	2.809
2016 - 2041	2,100	2,100	740	-	-	-	740	
2016 - 2051	2,400	2,400	850	-	-	-	850	

Source: Watson & Associates Economists Ltd., 2020.

Note: Figures may not add precisely due to rounding.

¹ Population undercount estimated at 3%.

² Includes all single and semi-detached homes as well as "other" detached homes as per Statistics Canada.

³ Includes all townhouses and apartments in duplex.

⁴ Includes all apartments with less than or greater than five storeys.



Appendix E-2, Table 8
County of Wellington
Housing Forecast by Area Municipality, 2016 to 2051

Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	10,870	4,110	4,490	3,140	3,250	4,660	2,700	33,220
2021	12,810	4,230	4,650	3,260	3,410	4,860	2,850	36,070
2026	14,380	4,770	4,800	3,540	3,850	5,580	2,970	39,890
2031	15,770	5,980	4,870	3,780	4,280	6,130	3,020	43,830
2036	17,570	6,630	4,950	3,960	4,640	6,590	3,170	47,510
2041	19,360	7,280	5,030	4,380	4,820	6,690	3,440	51,000
2046	20,820	8,180	5,060	4,450	5,120	7,380	3,510	54,520
2051	22,410	9,200	5,110	4,540	5,460	7,660	3,550	57,930
Share of 2016 County Households	33%	12%	14%	9%	10%	14%	8%	100%
Share of 2051 County Households	39%	16%	9%	8%	9%	13%	6%	100%
Housing Growth								
2016 - 2051	11,540	5,090	620	1,400	2,210	3,000	850	24,710
Annual Growth Rate, 2016 - 2051	2.1%	2.3%	0.4%	1.1%	1.5%	1.4%	0.8%	1.6%
Share of County Household Growth, 2016-2051	47%	21%	3%	6%	9%	12%	3%	100%

Note: Above figure includes "other" dwellings of approximately 540 units.

Source: Watson & Associates Economists Ltd.



Appendix E-3 – Population and Housing Forecasts by Urban Settlement Area



Appendix E-3, Table 1
Township of Centre Wellington
Population and Housing Forecast, 2016 to 2051

Fergus							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	14,300	14,700	4,060	470	1,170	5,690	2.51
2021	18,500	19,100	5,100	790	1,410	7,310	2.53
2026	19,500	20,100	5,290	960	1,530	7,790	2.50
2031	22,900	23,600	6,200	1,010	1,770	8,980	2.55
2036	26,900	27,700	7,200	1,340	1,930	10,470	2.57
2041	30,700	31,600	8,220	1,520	2,100	11,840	2.59
2046	33,100	34,000	8,540	2,020	2,480	13,040	2.53
2051	35,800	36,900	8,980	2,490	2,800	14,280	2.51

2016 - 2041	16,400	16,900	4,160	1,050	930	6,150
2016 - 2051	21,500	22,200	4,920	2,020	1,630	8,590

Elora/Salem							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	6,900	7,100	2,090	210	370	2,660	2.59
2021	7,600	7,800	2,250	240	460	2,960	2.57
2026	10,500	10,900	3,120	340	550	4,000	2.63
2031	11,100	11,400	3,240	350	570	4,160	2.66
2036	11,800	12,100	3,450	390	590	4,430	2.66
2041	12,700	13,100	3,580	650	600	4,820	2.63
2046	13,100	13,500	3,660	660	700	5,030	2.60
2051	13,800	14,200	3,820	730	790	5,340	2.58

2016 - 2041	5,800	6,000	1,490	440	230	2,160
2016 - 2051	6,900	7,100	1,730	520	420	2,680

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	7,000	7,200	2,350	0	0	2,350	2.99
2021	7,100	7,200	2,390	0	0	2,390	2.96
2026	7,100	7,300	2,430	0	0	2,430	2.94
2031	7,200	7,400	2,470	0	0	2,470	2.92
2036	7,300	7,500	2,510	0	0	2,510	2.91
2041	7,400	7,600	2,550	0	0	2,550	2.92
2046	7,500	7,700	2,590	0	0	2,590	2.90
2051	7,600	7,800	2,630	0	0	2,630	2.89

2016 - 2041	400	400	200	-	-	200
2016 - 2051	600	600	280	-	-	280



Appendix E-3, Table 2

Town of Erin

Population and Housing Forecast, 2016 to 2051

Erin (Village)							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	3,000	3,000	940	20	90	1,040	2.88
2021	3,000	3,100	950	20	100	1,070	2.80
2026	3,700	3,900	1,170	40	120	1,330	2.78
2031	5,600	5,800	1,680	220	180	2,080	2.69
2036	6,700	6,900	1,910	280	310	2,500	2.68
2041	7,700	7,900	2,040	340	530	2,910	2.65
2046	9,200	9,400	2,420	380	540	3,340	2.75
2051	10,400	10,700	2,740	440	590	3,770	2.76

2016 - 2041	4,700	4,900	1,100	320	440	1,870
2016 - 2051	7,400	7,700	1,800	420	500	2,730

Hillsburgh							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	1,400	1,400	490	10	30	530	2.64
2021	1,400	1,400	500	10	30	540	2.59
2026	1,900	1,900	630	30	60	720	2.64
2031	2,700	2,800	860	110	60	1,040	2.60
2036	3,100	3,100	910	160	110	1,190	2.61
2041	3,500	3,600	1,000	200	130	1,340	2.61
2046	4,800	4,900	1,380	210	140	1,720	2.79
2051	5,900	6,100	1,610	280	290	2,180	2.71

2016 - 2041	2,100	2,200	510	190	100	810
2016 - 2051	4,500	4,700	1,120	270	260	1,650

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	7,100	7,300	2,380	10	0	2,390	2.97
2021	7,300	7,500	2,460	10	0	2,470	2.96
2026	7,600	7,800	2,570	10	0	2,580	2.95
2031	7,800	8,100	2,690	10	0	2,700	2.89
2036	8,100	8,400	2,780	10	0	2,790	2.90
2041	8,500	8,700	2,870	10	0	2,880	2.95
2046	8,700	9,000	2,960	10	0	2,970	2.93
2051	9,100	9,400	3,090	10	0	3,100	2.94

2016 - 2041	1,400	1,400	490	-	-	490
2016 - 2051	2,000	2,100	710	-	-	710



Appendix E-3, Table 3
Township of Guelph/Eramosa
Population and Housing Forecast, 2016 to 2051

Rockwood							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	4,700	4,900	1,440	210	90	1,740	2.70
2021	5,100	5,200	1,570	220	90	1,880	2.71
2026	5,400	5,600	1,690	230	90	2,010	2.69
2031	5,500	5,600	1,730	240	100	2,070	2.66
2036	5,600	5,700	1,760	240	100	2,100	2.67
2041	5,700	5,900	1,800	250	110	2,160	2.64
2046	5,700	5,800	1,780	250	130	2,160	2.64
2051	5,700	5,800	1,780	250	150	2,180	2.61

2016 - 2041	1,000	1,000	360	40	20	420
2016 - 2051	1,000	900	340	40	60	280

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	8,100	8,300	2,660	30	40	2,730	2.97
2021	8,100	8,400	2,670	30	50	2,740	2.96
2026	8,200	8,500	2,690	30	50	2,760	2.97
2031	8,300	8,500	2,710	30	50	2,780	2.99
2036	8,400	8,600	2,740	30	50	2,810	2.99
2041	8,500	8,700	2,770	30	50	2,840	2.99
2046	8,500	8,800	2,800	30	50	2,870	2.96
2051	8,600	8,900	2,820	30	50	2,890	2.98

2016 - 2041	400	400	110	-	10	110
2016 - 2051	500	600	160	-	10	160



Appendix E-3, Table 4
Township of Mapleton
Population and Housing Forecast, 2016 to 2051

Drayton							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,200	2,300	690	40	80	810	2.72
2021	2,300	2,400	720	40	90	850	2.71
2026	2,500	2,500	740	80	100	920	2.72
2031	2,600	2,700	780	110	120	1,010	2.57
2036	2,700	2,800	810	110	130	1,050	2.57
2041	3,400	3,500	960	170	160	1,290	2.64
2046	3,400	3,500	970	170	160	1,300	2.62
2051	3,400	3,600	970	180	180	1,330	2.56

2016 - 2041	1,200	1,200	270	130	80	480
2016 - 2051	1,200	1,300	280	140	100	520

Moorefield							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	500	600	140	10	30	170	2.94
2021	500	600	140	10	30	180	2.78
2026	800	800	190	30	50	270	2.96
2031	1,000	1,100	260	40	60	360	2.78
2036	1,400	1,400	360	40	70	470	2.98
2041	1,900	1,900	490	70	90	660	2.88
2046	1,900	2,000	500	80	100	680	2.79
2051	2,100	2,200	550	80	110	750	2.80

2016 - 2041	1,400	1,300	350	60	60	490
2016 - 2051	1,600	1,600	410	70	80	580

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	7,800	8,000	2,090	0	0	2,090	3.73
2021	7,900	8,200	2,160	0	0	2,160	3.66
2026	8,200	8,500	2,280	0	0	2,280	3.60
2031	8,400	8,600	2,340	0	0	2,340	3.59
2036	8,400	8,700	2,370	0	0	2,370	3.54
2041	8,400	8,700	2,380	0	0	2,380	3.53
2046	8,500	8,700	2,390	0	0	2,390	3.56
2051	8,400	8,700	2,390	0	0	2,390	3.51

2016 - 2041	600	700	290	-	-	290
2016 - 2051	600	700	300	-	-	300



Appendix E-3, Table 5
Town of Minto
Population and Housing Forecast, 2016 to 2051

Clifford							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	830	860	280	30	40	350	2.37
2021	910	940	300	30	50	380	2.39
2026	990	1,010	310	40	60	410	2.41
2031	1,060	1,090	320	50	70	440	2.41
2036	1,130	1,170	330	60	80	470	2.40
2041	1,210	1,250	340	70	90	500	2.42
2046	1,280	1,320	350	80	110	530	2.42
2051	1,360	1,400	360	90	120	560	2.43

2016 - 2041	380	390	60	40	50	150
2016 - 2051	530	540	80	60	80	210

Harriston							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,100	2,100	610	10	160	780	2.69
2021	2,200	2,200	620	30	170	830	2.65
2026	2,500	2,600	720	50	170	940	2.66
2031	2,700	2,800	750	70	180	1,010	2.67
2036	2,900	3,000	800	100	190	1,090	2.66
2041	3,000	3,100	810	130	200	1,140	2.63
2046	3,200	3,300	850	140	210	1,200	2.67
2051	3,400	3,500	890	180	220	1,280	2.66

2016 - 2041	900	1,000	200	120	40	360
2016 - 2051	1,300	1,400	280	170	60	500

Palmerston							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,700	2,800	870	70	170	1,100	2.45
2021	2,900	2,900	890	90	180	1,160	2.50
2026	3,300	3,400	1,020	110	180	1,310	2.52
2031	4,200	4,400	1,300	130	190	1,620	2.59
2036	4,800	4,900	1,450	150	200	1,810	2.65
2041	5,000	5,100	1,490	170	220	1,880	2.66
2046	5,400	5,600	1,590	220	240	2,040	2.65
2051	5,900	6,100	1,710	250	260	2,220	2.66

2016 - 2041	2,300	2,300	620	100	50	780
2016 - 2051	3,200	3,300	840	180	90	1,120

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	3,000	3,100	1,010	0	0	1,010	2.97
2021	3,100	3,200	1,030	0	0	1,030	3.01
2026	3,500	3,600	1,170	0	0	1,170	2.99
2031	3,600	3,700	1,200	0	0	1,200	3.00
2036	3,700	3,900	1,260	0	0	1,260	2.94
2041	3,800	3,900	1,280	0	0	1,280	2.97
2046	3,900	4,000	1,320	0	0	1,320	2.95
2051	4,100	4,200	1,380	0	0	1,380	2.97

2016 - 2041	800	800	270	-	-	270
2016 - 2051	1,100	1,100	370	-	-	370



Appendix E-3, Table 6
Township of Wellington North
Population and Housing Forecast, 2016 to 2051

Arthur							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	2,500	2,600	740	100	170	1,010	2.48
2021	2,600	2,700	750	120	170	1,040	2.50
2026	3,400	3,500	940	140	240	1,320	2.58
2031	3,800	3,900	1,060	170	260	1,490	2.55
2036	4,100	4,200	1,110	200	280	1,590	2.58
2041	4,200	4,400	1,140	200	310	1,650	2.55
2046	4,500	4,700	1,200	240	330	1,770	2.54
2051	4,700	4,800	1,240	250	340	1,830	2.57

2016 - 2041	1,700	1,800	400	100	140	640
2016 - 2051	2,200	2,200	500	150	170	820

Mount Forest							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	5,100	5,200	1,500	160	560	2,220	2.30
2021	5,400	5,500	1,560	210	560	2,330	2.32
2026	6,500	6,700	1,840	270	640	2,750	2.36
2031	7,400	7,600	2,060	330	710	3,100	2.39
2036	8,200	8,500	2,290	410	710	3,410	2.40
2041	8,300	8,600	2,300	430	720	3,450	2.41
2046	9,700	10,000	2,670	530	740	3,940	2.46
2051	10,200	10,500	2,820	540	750	4,110	2.48

2016 - 2041	3,200	3,400	800	270	160	1,230
2016 - 2051	5,100	5,300	1,320	380	190	1,890

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	4,300	4,400	1,430	0	0	1,405	3.06
2021	4,400	4,500	1,470	0	0	1,470	2.99
2026	4,400	4,500	1,480	0	0	1,480	2.97
2031	4,500	4,600	1,520	0	0	1,520	2.96
2036	4,600	4,700	1,570	0	0	1,570	2.93
2041	4,600	4,800	1,570	0	0	1,570	2.93
2046	4,800	5,000	1,650	0	0	1,650	2.91
2051	5,000	5,100	1,700	0	0	1,700	2.94

2016 - 2041	300	400	140	-	-	165
2016 - 2051	700	700	270	-	-	295



Appendix E-3, Table 7
Township of Puslinch
Population and Housing Forecast, 2016 to 2051

Aberfoyle							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	300	300	140	20	10	170	2.07
2021	300	300	140	20	10	170	2.08
2026	300	400	140	20	10	170	2.08
2031	300	400	140	20	10	170	2.08
2036	300	400	150	20	10	180	2.09
2041	400	400	150	20	10	180	2.09
2046	400	400	150	20	10	180	2.10
2051	400	400	150	20	10	180	2.10
2016 - 2041	100	100	10	-	-	10	
2016 - 2051	100	100	10	-	-	10	

Morrison							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	500	500	140	0	20	160	3.13
2021	500	500	140	0	20	160	3.13
2026	600	600	180	0	20	200	3.00
2031	600	600	190	0	20	210	2.86
2036	700	700	220	0	20	240	2.92
2041	800	900	260	0	20	280	2.86
2046	900	900	270	0	20	290	3.10
2051	900	900	280	0	20	300	3.00
2016 - 2041	300	400	120	-	-	120	
2016 - 2051	400	400	140	-	-	140	

Rural							
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Households				Persons Per Unit (PPU)
			Low Density ²	Medium Density ³	High Density ⁴	Total	
2016	6,600	6,700	2,270	20	0	2,280	2.89
2021	6,900	7,100	2,420	20	0	2,440	2.83
2026	7,100	7,300	2,490	20	0	2,510	2.83
2031	7,200	7,400	2,540	20	0	2,560	2.81
2036	7,500	7,800	2,660	20	0	2,680	2.80
2041	8,300	8,500	2,890	20	0	2,910	2.85
2046	8,400	8,600	2,940	20	0	2,960	2.84
2051	8,500	8,700	2,970	20	0	2,990	2.84
2016 - 2041	1,700	1,800	620	-	-	630	
2016 - 2051	1,900	2,000	700	-	-	710	

Note: Urban Centres in Puslinch are not summarized at the County-Wide level as Urban Settlement Areas. Aberfoyle and Morrison are grouped as “Rural” at the County-Wide level.



Appendix F

Growth Allocations: Employment



Appendix F-1, Table 1
Township of Centre Wellington
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	2,540	6,520	9,060	55	590	645	9,705	93%	7%
	2011	2,570	6,875	9,445	55	730	785	10,230	92%	8%
	2016	2,230	7,610	9,840	55	560	615	10,455	94%	6%
Forecast	2021	2,510	9,070	11,580	55	600	655	12,235	95%	5%
	2026	2,810	10,540	13,350	55	590	645	13,995	95%	5%
	2031	3,410	12,115	15,525	55	650	705	16,230	96%	4%
	2036	4,010	13,795	17,805	55	660	715	18,520	96%	4%
	2041	4,810	15,740	20,550	55	670	725	21,275	97%	3%
	2046	5,410	17,130	22,540	55	680	735	23,275	97%	3%
	2051	5,910	18,420	24,330	55	690	745	25,075	97%	3%
Incremental	2016 - 2021	280	1,460	1,740	0	40	40	1,780	98%	2%
	2016 - 2026	580	2,930	3,510	0	30	30	3,540	99%	1%
	2016 - 2031	1,180	4,505	5,685	0	90	90	5,775	98%	2%
	2016 - 2036	1,780	6,185	7,965	0	100	100	8,065	99%	1%
	2016 - 2041	2,580	8,130	10,710	0	110	110	10,820	99%	1%
	2016 - 2046	3,180	9,520	12,700	0	120	120	12,820	99%	1%
	2016 - 2051	3,680	10,810	14,490	0	130	130	14,620	99%	1%



Appendix F-1, Table 2
Town of Erin
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	780	1,570	2,350	0	620	620	2,970	79%	21%
	2011	880	1,560	2,440	0	590	590	3,030	81%	19%
	2016	900	1,345	2,245	0	730	730	2,975	75%	25%
Forecast	2021	950	1,445	2,395	0	735	735	3,130	77%	23%
	2026	1,050	1,705	2,755	0	740	740	3,495	79%	21%
	2031	1,150	2,190	3,340	0	745	745	4,085	82%	18%
	2036	1,270	2,730	4,000	0	750	750	4,750	84%	16%
	2041	1,380	3,150	4,530	0	755	755	5,285	86%	14%
	2046	1,490	3,665	5,155	0	760	760	5,915	87%	13%
	2051	1,700	3,735	5,435	0	770	770	6,205	88%	12%
Incremental	2016 - 2021	50	100	150	0	5	5	155	97%	3%
	2016 - 2026	150	360	510	0	10	10	520	98%	2%
	2016 - 2031	250	845	1,095	0	15	15	1,110	99%	1%
	2016 - 2036	370	1,385	1,755	0	20	20	1,775	99%	1%
	2016 - 2041	480	1,805	2,285	0	25	25	2,310	99%	1%
	2016 - 2046	590	2,320	2,910	0	30	30	2,940	99%	1%
	2016 - 2051	800	2,390	3,190	0	40	40	3,230	99%	1%



Appendix F-1, Table 3
Township of Guelph/Eramosa
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	0	1,200	1,200	1,380	2,060	3,440	4,640	26%	74%
	2011	0	1,300	1,300	1,000	2,170	3,170	4,470	29%	71%
	2016	0	1,600	1,600	1,580	2,540	4,120	5,720	28%	72%
Forecast	2021	0	1,650	1,650	1,780	2,555	4,335	5,985	28%	72%
	2026	0	1,680	1,680	1,810	2,590	4,400	6,080	28%	72%
	2031	0	1,710	1,710	1,840	2,625	4,465	6,175	28%	72%
	2036	0	1,720	1,720	1,880	2,650	4,530	6,250	28%	72%
	2041	0	1,740	1,740	1,920	2,670	4,590	6,330	27%	73%
	2046	0	1,750	1,750	2,070	2,780	4,850	6,600	27%	73%
	2051	0	1,780	1,780	2,190	2,820	5,010	6,790	26%	74%
Incremental	2016 - 2021	0	50	50	200	15	215	265	19%	81%
	2016 - 2026	0	80	80	230	50	280	360	22%	78%
	2016 - 2031	0	110	110	260	85	345	455	24%	76%
	2016 - 2036	0	120	120	300	110	410	530	23%	77%
	2016 - 2041	0	140	140	340	130	470	610	23%	77%
	2016 - 2046	0	150	150	490	240	730	880	17%	83%
	2016 - 2051	0	180	180	610	280	890	1,070	17%	83%



Appendix F-1, Table 4
Township of Mapleton
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	390	1,620	2,010	280	1,410	1,690	3,700	54%	46%
	2011	480	1,700	2,180	340	1,530	1,870	4,050	54%	46%
	2016	500	1,490	1,990	350	1,720	2,070	4,060	49%	51%
Forecast	2021	510	1,740	2,250	400	1,780	2,180	4,430	51%	49%
	2026	660	1,805	2,465	470	1,850	2,320	4,785	52%	48%
	2031	720	2,115	2,835	520	1,880	2,400	5,235	54%	46%
	2036	790	2,435	3,225	560	1,900	2,460	5,685	57%	43%
	2041	850	2,835	3,685	600	1,900	2,500	6,185	60%	40%
	2046	1,040	2,900	3,940	670	1,970	2,640	6,580	60%	40%
	2051	1,210	3,050	4,260	720	2,020	2,740	7,000	61%	39%
Incremental	2016 - 2021	10	250	260	50	60	110	370	70%	30%
	2016 - 2026	160	315	475	120	130	250	725	66%	34%
	2016 - 2031	220	625	845	170	160	330	1,175	72%	28%
	2016 - 2036	290	945	1,235	210	180	390	1,625	76%	24%
	2016 - 2041	350	1,345	1,695	250	180	430	2,125	80%	20%
	2016 - 2046	540	1,410	1,950	320	250	570	2,520	77%	23%
	2016 - 2051	710	1,560	2,270	370	300	670	2,940	77%	23%



Appendix F-1, Table 5
Town of Minto
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	690	1,920	2,610	0	790	790	3,400	77%	23%
	2011	890	1,930	2,820	0	780	780	3,600	78%	22%
	2016	1,150	1,970	3,120	0	910	910	4,030	77%	23%
Forecast	2021	1,160	2,085	3,245	0	920	920	4,165	78%	22%
	2026	1,300	2,220	3,520	0	925	925	4,445	79%	21%
	2031	1,460	2,350	3,810	0	935	935	4,745	80%	20%
	2036	1,640	2,560	4,200	0	945	945	5,145	82%	18%
	2041	1,790	2,775	4,565	0	955	955	5,520	83%	17%
	2046	2,000	3,035	5,035	0	965	965	6,000	84%	16%
	2051	2,210	3,315	5,525	0	975	975	6,500	85%	15%
Incremental	2016 - 2021	10	115	125	0	10	10	135	93%	7%
	2016 - 2026	150	250	400	0	15	15	415	96%	4%
	2016 - 2031	310	380	690	0	25	25	715	97%	3%
	2016 - 2036	490	590	1,080	0	35	35	1,115	97%	3%
	2016 - 2041	640	805	1,445	0	45	45	1,490	97%	3%
	2016 - 2046	850	1,065	1,915	0	55	55	1,970	97%	3%
	2016 - 2051	1,060	1,345	2,405	0	65	65	2,470	97%	3%



Appendix F-1, Table 6
Township of Wellington North
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	2,500	2,760	5,260	465	380	845	6,105	86%	14%
	2011	2,000	2,835	4,835	470	655	1,125	5,960	81%	19%
	2016	2,210	3,555	5,765	475	830	1,305	7,070	82%	18%
Forecast	2021	2,320	3,580	5,900	475	890	1,365	7,265	81%	19%
	2026	2,420	3,885	6,305	480	920	1,400	7,705	82%	18%
	2031	2,720	4,185	6,905	490	940	1,430	8,335	83%	17%
	2036	3,020	4,445	7,465	510	960	1,470	8,935	84%	16%
	2041	3,170	4,765	7,935	525	980	1,505	9,440	84%	16%
	2046	3,320	5,155	8,475	525	1,000	1,525	10,000	85%	15%
	2051	3,470	5,460	8,930	550	1,020	1,570	10,500	85%	15%
Incremental	2016 - 2021	110	25	135	0	60	60	195	69%	31%
	2016 - 2026	210	330	540	5	90	95	635	85%	15%
	2016 - 2031	510	630	1,140	15	110	125	1,265	90%	10%
	2016 - 2036	810	890	1,700	35	130	165	1,865	91%	9%
	2016 - 2041	960	1,210	2,170	50	150	200	2,370	92%	8%
	2016 - 2046	1,110	1,600	2,710	50	170	220	2,930	92%	8%
	2016 - 2051	1,260	1,905	3,165	75	190	265	3,430	92%	8%



Appendix F-1, Table 7
Township of Puslinch
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas			Rural Area			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	0	0	0	2,130	1,850	3,980	3,980	0%	100%
	2011	0	0	0	1,770	1,630	3,400	3,400	0%	100%
	2016	0	0	0	2,400	3,225	5,625	5,625	0%	100%
Forecast	2021	0	0	0	2,430	3,385	5,815	5,815	0%	100%
	2026	0	0	0	2,650	3,410	6,060	6,060	0%	100%
	2031	0	0	0	2,870	3,435	6,305	6,305	0%	100%
	2036	0	0	0	3,130	3,465	6,595	6,595	0%	100%
	2041	0	0	0	3,510	3,480	6,990	6,990	0%	100%
	2046	0	0	0	3,900	3,505	7,405	7,405	0%	100%
	2051	0	0	0	4,390	3,530	7,920	7,920	0%	100%
Incremental	2016 - 2021	0	0	0	30	160	190	190	0%	100%
	2016 - 2026	0	0	0	250	185	435	435	0%	100%
	2016 - 2031	0	0	0	470	210	680	680	0%	100%
	2016 - 2036	0	0	0	730	240	970	970	0%	100%
	2016 - 2041	0	0	0	1,110	255	1,365	1,365	0%	100%
	2016 - 2046	0	0	0	1,500	280	1,780	1,780	0%	100%
	2016 - 2051	0	0	0	1,990	305	2,295	2,295	0%	100%



Appendix F-1, Table 8
County of Wellington
Employment Forecast, 2016 to 2051

Year		Urban Settlement Areas ¹			Rural Area ²			Total Employment	Urban Employment %	Rural Employment %
		Employment Land Employment	Population-Related Employment	Total Urban Employment	Employment Lands Employment	Other Rural	Total Rural Employment			
		A	B	C = A + B	D	E	F = D + E	G = C + F	H = C / G	I = F / G
Historical	2006	6,900	15,600	22,500	4,300	7,700	12,000	34,500	65%	35%
	2011	6,800	16,200	23,000	3,600	8,100	11,700	34,700	66%	34%
	2016	7,000	17,600	24,600	4,900	10,500	15,400	39,900	62%	38%
Forecast	2021	7,500	19,600	27,000	5,100	10,900	16,000	43,000	63%	37%
	2026	8,200	21,800	30,100	5,500	11,000	16,500	46,600	65%	35%
	2031	9,500	24,700	34,100	5,800	11,200	17,000	51,100	67%	33%
	2036	10,700	27,700	38,400	6,100	11,300	17,500	55,900	69%	31%
	2041	12,000	31,000	43,000	6,600	11,400	18,000	61,000	70%	30%
	2046	13,300	33,600	46,900	7,200	11,700	18,900	65,800	71%	29%
	2051	14,500	35,800	50,300	7,900	11,800	19,700	70,000	72%	28%
Incremental	2016 - 2021	500	2,000	2,500	300	400	600	3,100	81%	19%
	2016 - 2026	1,300	4,300	5,500	600	500	1,100	6,600	83%	17%
	2016 - 2031	2,500	7,100	9,600	900	700	1,600	11,200	86%	14%
	2016 - 2036	3,700	10,100	13,900	1,300	800	2,100	15,900	87%	13%
	2016 - 2041	5,000	13,400	18,400	1,800	900	2,600	21,100	87%	13%
	2016 - 2046	6,300	16,100	22,300	2,400	1,100	3,500	25,800	86%	14%
	2016 - 2051	7,500	18,200	25,700	3,000	1,300	4,400	30,100	85%	15%

Source: Watson & Associates Economists Ltd.

Notes: Figures have been rounded and may not up precisely at the area municipal level.

Employment Land Employment is defined as employment within "industrial-type" buildings.

"Other Rural" includes employment within a rural area outside a Rural Employment Area and include agriculture, commercial/institutional and mixed industrial/agriculture employment.

¹Urban Settlement Areas include: Erin Village, Hillsburgh, Fergus, Elora-Salem, Mount Forest, Arthur, Rockwood, Drayton, Moorefield, Harriston, Palmerston, Clifford.

²All employment outside of urban settlement areas.



Appendix F-2: Wellington County Employment by Area Municipality, 2051

Year	Centre Wellington	Erin	Guelph-Eramosa	Mapleton	Minto	Wellington North	Puslinch	County of Wellington
2016	10,500	3,000	5,700	4,100	4,000	7,100	5,600	40,000
2021	12,200	3,100	6,000	4,400	4,200	7,300	5,800	43,000
2026	14,000	3,500	6,100	4,800	4,400	7,700	6,100	46,600
2031	16,200	4,100	6,200	5,200	4,700	8,300	6,300	51,000
2036	18,500	4,800	6,300	5,700	5,100	8,900	6,600	55,900
2041	21,300	5,300	6,300	6,200	5,500	9,400	7,000	61,000
2046	23,300	5,900	6,600	6,600	6,000	10,000	7,400	65,800
2051	25,100	6,200	6,800	7,000	6,500	10,500	7,900	70,000
Share of 2016 County Employment	26%	8%	14%	10%	10%	18%	14%	100%
Share of 2051 County Employment	36%	9%	10%	10%	9%	15%	11%	100%
Employment Growth								
2016 - 2051	14,600	3,200	1,100	2,900	2,500	3,400	2,300	30,000
Annual Growth Rate, 2016 - 2051	2.5%	2.1%	0.5%	1.5%	1.4%	1.1%	1.0%	1.6%
Share of County Employment Growth, 2016-2051	49%	11%	4%	10%	8%	11%	8%	100%

Note: Figure has been rounded by Area Municipality.

Source: Watson & Associates Economists Ltd., 2021.