

The Grey't Reset

Economic Development, Tourism and Culture Master Plan

October 2023



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Prepared by:



McSweeney and Associates

201-900 Greenbank Road

Ottawa, ON K2J 1A8

T: 1-855-300-8548

E: consult@mcsweeney.ca

W: www.mcsweeney.ca

Acknowledgments

Our sincere appreciation is extended to Grey County's elected officials, staff, committees, member municipalities, residents, business owners, cultural and community partners for their participation and feedback throughout the consultation process. Your honest input, vision, knowledge, and experience helped to shape our path forward.

A heartfelt thanks to the Economic Development, Tourism & Culture team for the incredible expertise, passion and care you embed in your work each and every day. The time, input, and direction you dedicated to developing this plan and its actions, gives great confidence, that together, we'll move forward in a meaningful and impactful way, to care for our people and place – past, present, and future.

A humble thanks to our Indigenous partners, who we are committed to walking with.

We wish to begin by respectfully acknowledging that our community gathering place is situated on the traditional territory of the Anishinabek Nation: The People of the Three Fires known as Ojibway, Odawa, and Pottawatomie Nations. And further gives thanks to the Chippewas of Saugeen, and the Chippewas of Nawash, known collectively as the Saugeen Ojibway Nation, as the traditional keepers of these lands and waters.

We are dedicated to honoring Indigenous history and culture and committed to moving forward in the spirit of truth, reconciliation and friendship with all First Nations, Metis and Inuit people.





Grey County

Economic Development,
Tourism & Culture
Department

595 9th Avenue East, Owen
Sound, ON, N4K 3E3

P: 519.372.0219

ecdev@grey.ca

industry@visitgrey.ca

madeingrey.ca

visitgrey.ca

Grey Roots Museum & Archives

102599 Grey Road 18, RR4,
Owen Sound, ON, N4K 5N6

P: 519.376.3690

info@greyroots.com

greyroots.com

Sydenham Campus

1130 8th Street East, Owen
Sound, ON, N4K 5N8

P: 519.374.9567

sydenhamcampus@grey.ca



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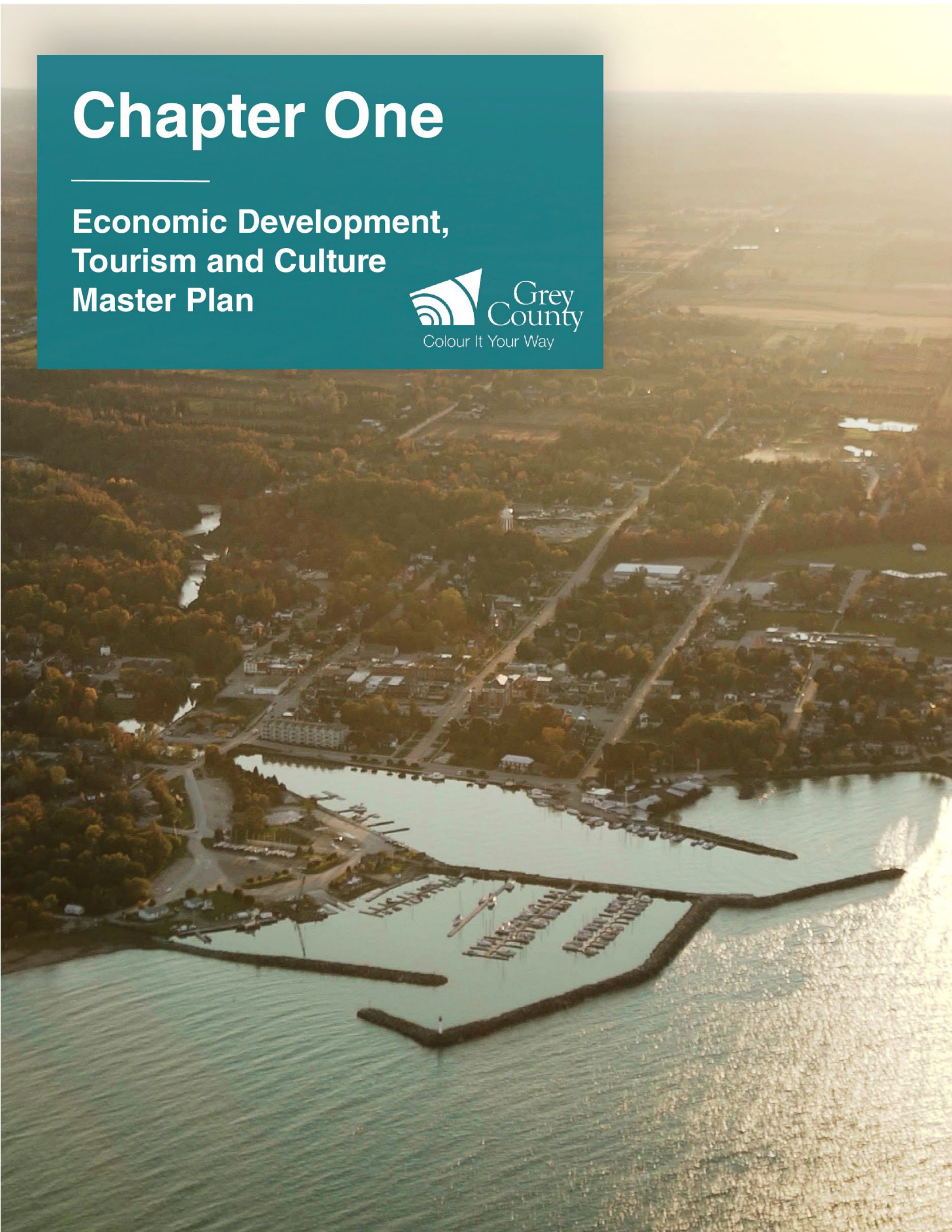
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Chapter One

Economic Development, Tourism and Culture Master Plan





Executive Summary

The world has changed dramatically over the past few years. The business environment and expectations are different. Given this point in time, the team has coined the strategy, the **Grey't Reset**, seeing the opportunity to account for all the changes and collectively determine the best way forward through programs and support.

It's about...

- Building on the county's previous economic development strategy, destination development action plan and Grey Roots strategic plan.
- Further strengthening and diversifying the local economy.
- Providing direction and guidance to Grey's economic development, tourism and culture activities for both the short and long term.

The Economic Development, Tourism and Culture Master Plan has been developed by the County and its partners, with the intention to help drive community success, growth, and investment. Building on the previous departmental strategies, the purpose of this Master Plan is to assess how the Economic Development, Tourism and Culture Department collaborates with member municipalities and community partners, to become more “proactive” rather than “reactionary”. The plan seriously considers the available resources, priority needs and what actions will bring the most value to our member municipalities and partners. This Master Plan is unique to Grey County and reflects the community's economic, geographic, social and cultural diversity.





Development of the Master Plan began with a quantitative analysis through a document review and data analysis of Grey County, presenting a thorough, introductory understanding of the economic, social and cultural environment.

Following this initial assessment, additional qualitative context was gathered through community consultations, which provided valuable local insight into the strengths, challenges, opportunities and aspirations that partners, residents and businesses in Grey County see and feel exist within their community.

Following this discovery process, building of the plan commenced through the establishing of key themes that emerged from this initial work. Once themes were identified, partners and staff were again consulted to develop actions related to those themes that were realistic, achievable, and supported by the community. An engagement session was hosted with Grey County's Planning and Economic Development Advisory Committee (PEDAC) and Agriculture Advisory Committee, before returning to consult again with staff and partners. This internal/external consultation cycle was strategically repeated three times, refining actions throughout each round, until we reached a place where goals and output merged to create a focused set of priority actions, considered to be realistic, achievable and bring the most value to the County and its partners.

Throughout the process, a conscious effort was made to look inward at Grey County. We chose not to engage in a comparative analysis beyond our immediate borders, where we are formally linked through cross-border programs (ie. RTO7 and Clean Energy Frontier). We were looking, specifically and strategically, at who we are and what we have to offer. The people, the pride and the resources available here, in Grey County. External influence—regional, provincial, national and global—was considered throughout, but only as it applied to what is happening and what could happen locally.





A Made in Grey Approach

A dominant message that came out through consultations was an overwhelming love for Grey County as a unique and very special place in the world, with its stunning natural landscape anchored by the Niagara Escarpment and Georgian Bay. Quality of life was touted as second to none where residents can enjoy their everyday life, at home, at work and in the community, with joy.

People consistently noted that Grey County's economic, social, environmental and cultural fabric had room to grow, be nurtured and protected. It was clear that our partners prefer a **Made in Grey** approach, that celebrates and holds on to who we are, while we grow together. It's about deciding what we want our County to look like, and taking a proactive, collaborative approach to get there in a sustainable way.





Five-Year Reflection 2018-2023

Collectively, our team and our partners have moved the bar significantly over the past five years, delivering programs and services to strengthen the economy and community. We also experienced a multi-year global pandemic that influenced the same economy and community.

During this time, our community experienced its largest growth (7.5%) in history, pushing our population over 100,000 and business counts grew by more than 2,000 new businesses, bringing our total to over 12,000 businesses.

While there are many actions and results, some of the most notable include:

- Transitioned and grew the Business Enterprise Centre.
- Developed Sydenham Campus: Regional Skills Training, Trades and Innovation Centre.
- Named a Smart21 Intelligent Community for the second time.
- Assisted Georgian College to expand their apprenticeship program, adding seven additional programs and growing the annual enrollment from 100 to 600.
- Supported the development of local business accelerator services through Catapult Grey Bruce.





- Brought together partners who developed an award-winning Long Term Care Workforce Collaboration.
- Hosted annual job fairs with more than 100 employers and 1000 participants annually.
- Launched the Grey Bruce Local Immigration Partnership with Bruce County and approved our first five-year Settlement Strategy.
- Approved and actioned our first Investment Attraction Strategy.
- Launched a county-wide Community Improvement Plan (CIP) resulting in more than \$24 million public-private investment to date.
- Launched the Made in Grey brand.
- Partnered with Georgian College to develop a position dedicated to International Students.
- Developed our first Local Agri-Food Strategy, Regional Airport Study, Cycling and Trails Master Plan.
- Worked alongside Bruce Power, Bruce County and Huron County to build the Clean Energy Frontier, Supply Chain and support MCR.
- Embarked on first foreign direct investment missions.
- Launched the Young Professionals Network.





Grey Roots

- Constructed the 1920s General Store replica in Moreston Heritage Village.
- Designed and constructed Voices and Abundance permanent exhibits in Grey County Gallery.
- Digitized By-laws, Minutes, and Minutes and Proceedings publications of the County of Grey through the Provincial Municipal Modernization Program.
- Developed and launched the Grey County Cultural Initiatives Fund.
- Co-designed and introduced the Indigenous Advisory Circle alongside Indigenous elders.
- Welcomed the Saukiing Anishinaabekiing presents Our Stories – long-term Indigenous art/history exhibit.
- Developed and launched Zooz's Place Children's Gallery through a generous sponsorship by Fairmont Security.
- Developed Facing the Flames exhibit in co-operation with fire departments from across the County and recognized by Ontario Museum Association – Award of Excellence for Community Engagement.
- Constructed the Grey Monument in Moreston Heritage Village.
- Developed and launched the Grey County Communities Century Plus Sampler Map and Black History Map of Grey County GIS projects.





Statistically Speaking, from 2018 to 2023...

Grey County's Achievements from 2018 to 2023	
Action	Statistics
Grey County Business Counts	10,019 to 12,295
Business Enterprise Centre	2,519 inquiries; 658 consultations; 101 starter company grants; 22 summer company grants; 141 workshops and events.
Digital Service Squad	149 Business Consultations; 21 training events.
Tourism Marketing Reach	1,335,162 (Visitgrey.ca – 5 years) 2,470,958 (Facebook and Instagram - 3 years)
Grey Roots Visitation	105,266 visitors 676 Kids Camp attendees 5,388 education program students 18,147 event and program attendees
Grey Roots Programs and Events	193 education programs 46 events 47 exhibits
Grey Roots Volunteer Hours	25,848 volunteer hours



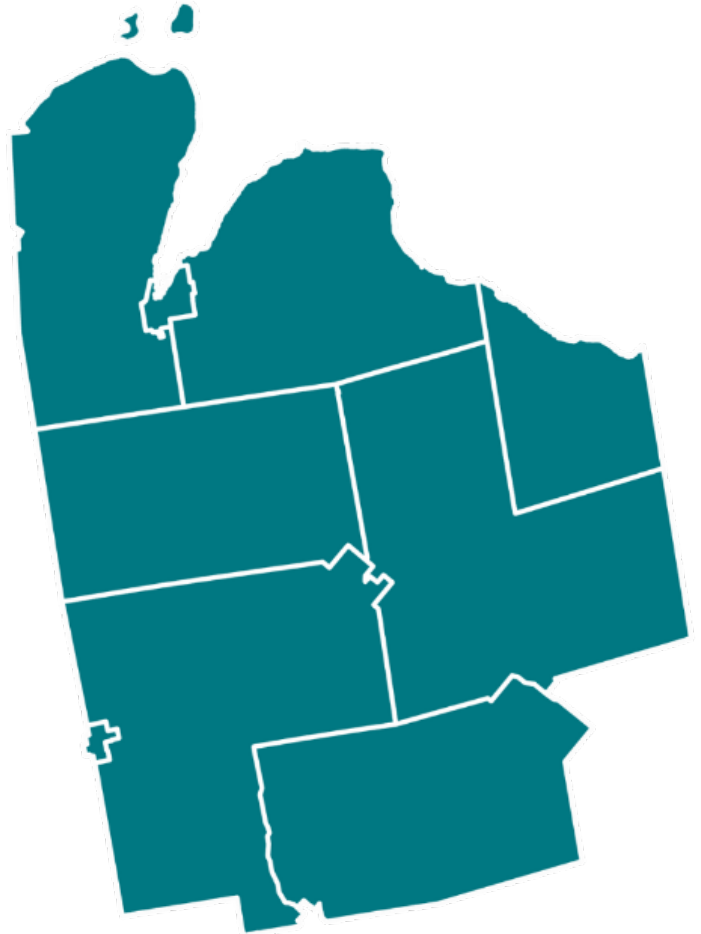


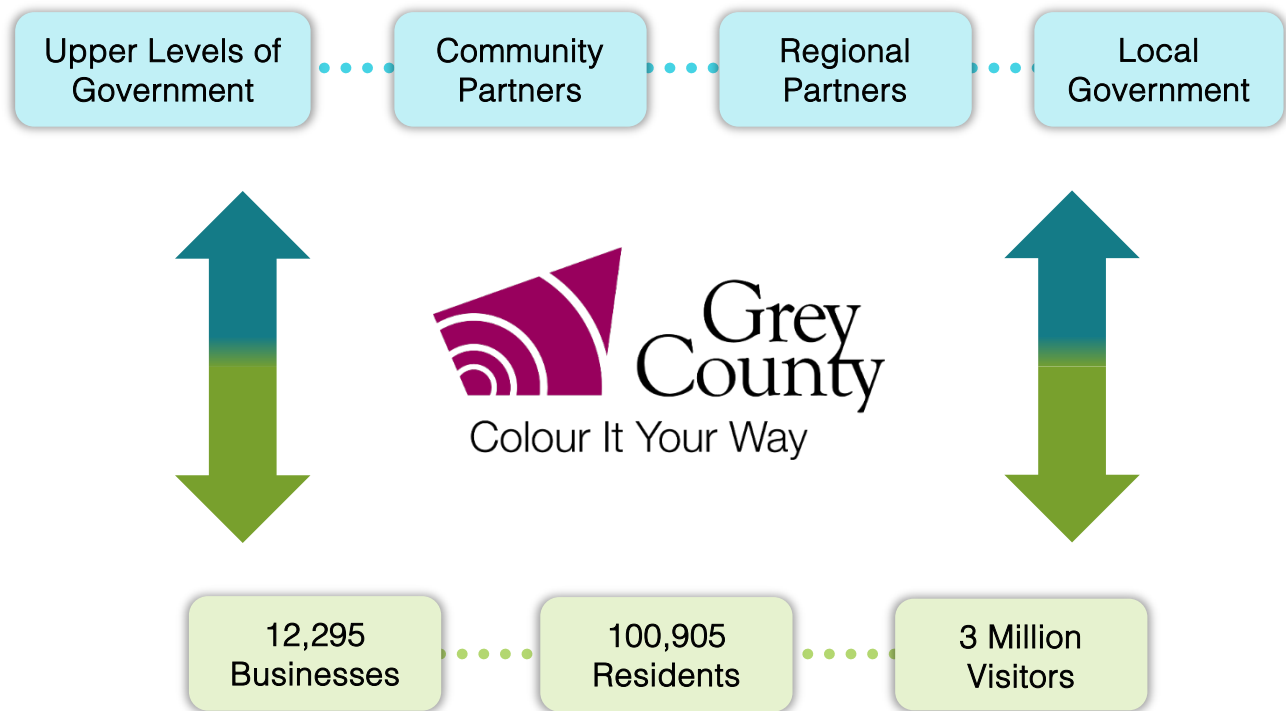
What is Our Role?

This is a question we asked ourselves at every step in this journey. Given our position as Grey County, what can we do with the resources we have, to bring the most value?

We are the great connectors. Our municipal and community partners are localized, drawing insight and direction from the ground up. We are constantly scanning the regional environment, listening, and facilitating connections to find innovative and meaningful solutions. While we share the same geography, we offer a different view. We thrive on a systems approach. When we think about the ecosystem of players in economic development, tourism and culture, the list is long.

Collaboration as a core mandate means we are collectively and succinctly rising the tide to float all boats as they say. Together, we provide the services and set the environment for success.







The Next Ten Years

As a Corporation, Grey County recognizes that we are better growing together. Collectively the values of integrity, collaboration, equity and sustainability guide our actions and decisions.

The Economic Development, Tourism and Culture (EDTC) Department plays a key role in realizing this vision: everything we do, is for our people. Collectively, the EDTC team works to create an enabling environment for people and businesses to invest. We also work to create a sense of pride and belonging in our communities, where our people can enjoy their lived experience.

Over the next 10 years, through the work of the EDTC Department:

Grey County will...

- Be forward thinking and future ready.
- Be innovative and entrepreneurial.
- Be connected and integrated with our partners across the county.
- Have a diversified economy, focused on clean energy, agriculture, tourism, manufacturing, health care, and culture industries.
- Embrace policies that support equity, diversity, and inclusion in our communities.
- Focus on sustainability, including supporting clean energy industries and sustainable tourism.
- Be sensitive to our landscape and protect the environment and natural beauty of the County.
- Have vibrant downtowns/main streets that attract residents and visitors.
- Continue to preserve our agricultural roots and support our local farmers.
- Grow and sustain a world-class, four-season tourism sector.
- Celebrate Grey's people, culture and heritage.
- Continue to have the small-town feeling, be peaceful and safe.
- Know who we are and stay true to that.



Grey Roots Museum & Archives will...

- Collect, preserve, and present local historical artefacts and archival materials that represent the diverse communities in Grey County.
- Develop strong, collaborative partnerships with local communities, institutions, and organizations.
- Provide intriguing, interactive experiences, information, workshops, and events that reflect the interests of residents and visitors.
- Explore creative revenue opportunities through sponsorships, partnerships, grants and third-party licensing.

As the EDTC team, we will foster a systems approach and work in concert with our colleagues and partners to share resources, build capacity and bring value. We will focus on internal and external communications and be the best leaders, ambassadors, and champions we can possibly be.





10 Years From Now

Economic Development and Tourism

Grey County in connection with our Member Municipalities will be active as Team Grey, where we collaborate through trust and seed mutual success. We will speak with one voice and achieve goals effectively, in a timely manner and with fewer resources. Grey County will share a cohesive vision that is carried out through effective and true collaboration to benefit us all.

Grey County and its partners will have access to shared tools and resources at their fingertips and have moved from investment readiness to attraction.

Grey County will further diversify, moving clean energy, healthcare and culture industries from emerging to core sectors, joining alongside agriculture, manufacturing and tourism as our robust and foundational economy.

Grey County and its partners will continue to flex their innovative and entrepreneurial muscle through Sydenham Campus, to feed thriving regional networks.

Our world-class four-season destination is being built through well planned investment, enriching the lives and experience of all visitors and residents alike.

Grey Roots

Grey Roots sits in the foreground of culture and connection in the region, leading by example and assisting others to build capacity.

Diverse relationships and partnerships are established and incorporated into the heart of operations of Grey Roots.

Experiential learning is achieved through workshops, interactive displays and different methods of programming using arts, technology, and skills.

Grey Roots is a top-of-mind destination for tourists and residents to learn, experience, connect and reflect.

Grey Roots has more control over site use and can generate more revenue through diverse offerings, driving increased attendance.



Process Followed

Grey County Economic Development, Tourism and Culture Master Plan Consultation Roadmap

Step 1: Discover

Research the community.

- Document review.
- Situational Analysis and Comparative Analysis.

Step 2: Define

Consult with the community.

- One-on-one interviews.
- Online survey.
- Focus groups.

Step 3: Develop

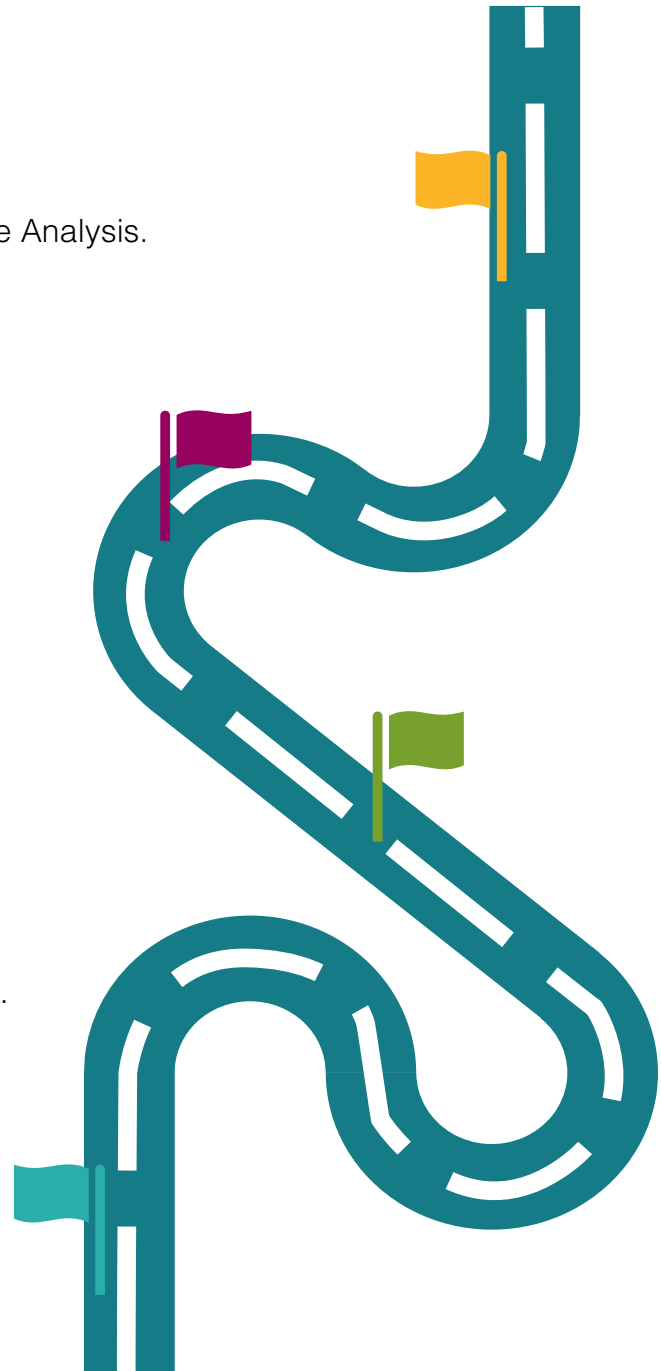
Build the plan.

- SCOAR®.
- Working Session.
- Staff Consultations.
- Committee Consultations.
- Develop the Actions.
- Draft Master Plan.
- Final Staff and Partner Consultations.
- Final Master Plan.

Step 4: Deliver

Present the results.

- Presentation to Council.
- Implementation Plan.
- Evaluation Plan.





Step 1: Discover

Research the Community.

To begin the process, an in-depth review of the current situation in Grey County was undertaken. This included the completion of a Situational and Comparative Analysis that shows the picture of Grey County through a quantitative lens, alongside a Document Review that provides a snapshot of the key initiatives undertaken by the County and member municipalities.

Document Review

The following 30 documents were reviewed to provide background information on Grey County.

County-Wide Documents (Published Year)

- Recolour Grey, County Official Plan (2019).
- Corporate Strategic Plan Update (2022).
- Grey County Growth Management Strategy (2008, with updates in 2014 and 2021).
- Grey County Economic Development Strategic Plan (2015).
- Grey County Destination Development Action Plan (2016)
- Grey Roots Strategic Plan (2016).
- Grey Bruce Local Immigration Partnership Settlement Strategy 2025 (2021).
- Grey County Cycling and Trails Master Plan (2020).
- Investment Attraction Strategy (2022).
- Grey County Local Agri-Food Strategy (2017).
- Hanover-Owen Sound Task Force Final Report (2021-2022).
- Climate Change Action Plan (2022).
- Nuclear Innovation Institute Clean Energy Frontier (2022).

Member Municipalities' Strategies and Plans

- Owen Sound Strategic Plan (2013-2015) and 2021-2023 Refresh.
- Town of Hanover Economic Development Strategy (2018-2022).
- Hanover Strategic Plan (2019-2022).
- Georgian Bluffs Strategic Plan (2019-2023).
- Chatsworth Community Improvement Plan (Ongoing).
- Chatsworth Recreation Master Plan (2018).
- Meaford Strategic Plan (2019-2022).
- Blue Mountains Corporate Strategic Plan (2020-2024).
- Blue Mountains Economic Development Strategy (2021-2025).
- Grey Highlands Strategic Plan (2019-2023).
- Grey Highlands Economic Development Strategy (2018).
- West Grey Strategic Vision Plan (2020-2022).
- Southgate Official Plan (2022).
- Southgate Recreation Master Plan (2020).



Situational and Comparative Analysis Snapshot

The Situational and Comparative Analysis presents a statistical perspective of the County and provides a baseline from which to measure. This report is an informational piece crafted in early 2023 and does not prescribe a certain solution; instead, it presents a reality or statistical perspective within the local context. As the data within this document was gathered during the COVID-19 pandemic, certain figures may be suppressed or heightened due to the pandemic's unique conditions. The analysis assesses socio-demographic profiles, housing and income data, the local labour force, and industry-specific economic drivers within Grey County. It concludes with a comparative analysis of Grey County, Simcoe County, and Bruce County, to highlight similarities and distinctions between the three economies.

This document is presented in **Appendix Four**.



Step 2: Define

Consult with the Community.

The consultation process used to develop the Economic Development, Tourism and Culture Master Plan was meaningful and intensive. Participants from across the region actively engaged, representing all our department's key partners and the community at large.

The consultation process involved three feedback loops to ensure alignment and buy-in between internal and external partners. These loops were purposefully designed to gather and review input and prioritize and refine actions through each cycle until we reached a place where goals and output merged to create a focused set of priority actions, considered to be realistic, achievable and bring the most value to the County and its partners.

The three consultation loops are described through the following sections:

- Community Consultation.
- Theme and Priority Development.
- Strategic Directions and Action Planning.





Community Consultation

45 one-on-one phone interviews were conducted with key partners; 26 specific to economic development and tourism, 19 specific to Grey Roots.

60 participants engaged in eight focus groups that took place in March 2023.

- 43 participants across six economic development and tourism focus groups (Member Municipalities, Tourism Partners, Tourism Businesses, Community Partners, Large Business, and Economic Development partners).
- 17 participants across two Grey Roots focus groups (Grey Roots and Culture Partners and Indigenous Advisory Circle).

198 responses were gathered through an online survey that was available to the public from mid-March to early-April 2023.

- 129 surveys were completed for economic development and tourism.
- 69 surveys were completed for Grey Roots.





The interviews, community online survey and focus groups were based on the following set of questions:

Consultation Questions	
Economic Development and Tourism	Grey Roots
<ol style="list-style-type: none"> 1. What makes Grey County a great community to do business? 2. What are the top opportunities for attracting and retaining business and improving Grey's future economic growth? 3. What makes it challenging to do business in Grey County? 4. If the County could resolve only one issue/challenge to encourage sustained business growth and investment in the local economy what would be the priority? 5. Describe your vision of Grey's economy over the next 5–10 years. 6. What, if anything needs to be done to ensure Grey County's economy is minimally affected by future climate change predictions? 7. Of all the places in the world, you are here. What do you value most about the quality of life in Grey County? 8. How could the quality of life be enhanced? 	<ol style="list-style-type: none"> 1. What is your affiliation with the Grey Roots Museum & Archives? 2. In your opinion, why does Grey Roots exist? 3. What are the current strengths of Grey Roots? 4. What do you find challenging about Grey Roots? 5. What can be done to lessen/overcome these challenges? 6. What are the opportunities to fully utilize Grey Roots? 7. How do you want to see Grey Roots evolve over the next 5 to 10 years? In other words, what is your vision for the future of Grey Roots? 8. What type of investment in Grey Roots would be needed to realize your vision? 9. The new International Council of Museums definition for museums notes: <i>"A museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing."</i> When you think about Grey Roots, does this definition resonate with you? Why or why not?

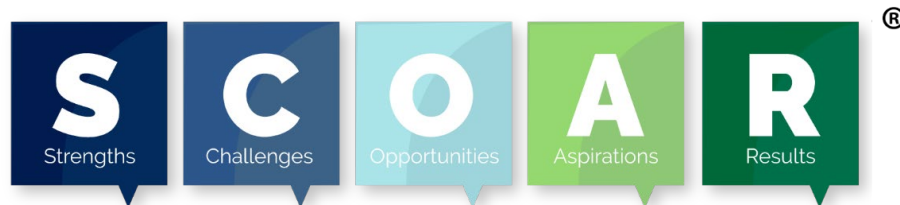


Step 3: Develop

Build the Plan.

SCOAR® Analysis

Once the background research and initial consultations were completed, the 'developing' process began with a summation of the findings of the initial consultations and data analysis, presented through a Strengths, Challenges, Opportunities, Aspirations and Results (SCOAR®) Analysis. The SCOAR® was used as the fundamental basis to determine the five themes, as directed by consultation.



The SCOAR® is a detailed analysis of the current situation involving statistical analysis of the local economy, regional competitive outlook, trends and forecasts, investment readiness assessment, strengths/weaknesses/opportunities review using the McSweeney exclusive SCOAR® analysis.

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis has a “50%” focus on “negative” aspects of analysis. A Strengths, Opportunities, Aspirations, and Results (SOAR) analysis emphasizes the positive, though it fails to address barriers or challenges to economic growth that every community faces. Our SCOAR® Analysis provides greater balance than either SWOT or SOAR analysis.

The results of the Grey County and Grey Roots SCOAR® analyses can be found in **Appendices Two and Three**.

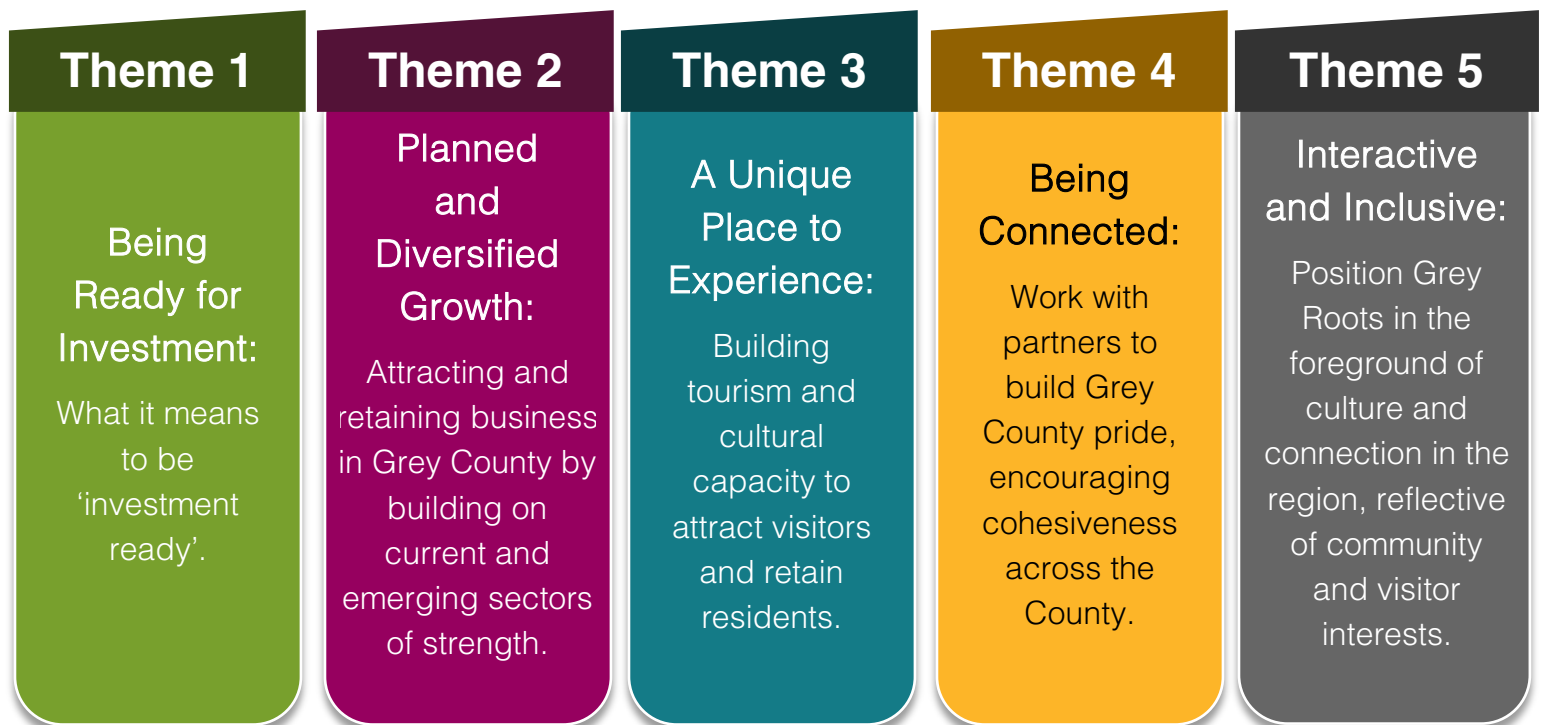


Theme and Priority Development

45 participants engaged in the half-day working session on April 20, 2023, to review consultation findings and begin to draft realistic and high-value actions. Participants included: community partners, member municipalities and county staff.

The Strategic Working Session provided an opportunity for participants to begin to develop a set of draft strategic actions that would form the base of Grey County's Economic Development, Tourism and Culture Master Plan, inclusive of a 10-year vision and 5-year action plans.

Through the working session, the following five themes, were agreed to reflect the current and future need of the County.



Following the working session, the EDTC leadership team deeply discussed the themes, pain points and future state ambition of the conversation to refine the themes into five priority areas:



The Grey't Reset Priority Areas	
Economic Development and Tourism	Grey Roots
Priority 1: Leadership and Collaboration	Priority 1: Leadership and Collaboration
Priority 2: Investment Ready	Priority 2: Inclusive Storytelling
Priority 3: Diversify and Expand	Priority 3: Interactive Experiences
Priority 4: Entrepreneurship and Innovation	Priority 4: Destination Development
Priority 5: Destination Development	Priority 5: Innovative Practices





On July 20, 2023, **28 committee members participated in the engagement sessions** between the Planning and Economic Development Advisory Committee (PEDAC) and Agriculture Advisory Committee.

The main objective of the PEDAC meeting was to get feedback, input, and support on the direction that the Master Plan was taking. The in-person meeting, held at Sydenham Campus had representation from elected officials, economic development staff from member municipalities, and local businesses.

The main objective for meeting with the Agricultural Advisory Committee was to understand how Grey County can best support agriculture, as a key sector, through the Grey County Economic Development, Tourism and Culture Master Plan.

Following these engagement sessions and with further staff consultation, Priority 3 for Economic Development and Tourism was updated to Business Retention and Expansion.





Strategic Directions and Action Planning

Upon completion of the external consultation process, a draft set of strategic community-based actions were prepared for review. To ensure that the actions aligned with the aspirations and vision of Grey County, a virtual strategic planning session was held with the EDTC leadership team.

Following this session, **32 staff participated in seven, two-hour engagement sessions** to discuss consultation findings and recommended actions. Together, the sessions encouraged staff to idea share and apply their experience and expertise, to prioritize staff-supported realistic and high-value actions for recommendation to Council.

Collaboratively, McSweeney and Associates and staff co-developed strategic actions that are realistic, achievable and will bring high-value over the next five years. These actions will be used to move the bar once again towards realizing the 10-year vision.

Three final reviews and endorsement were conducted with EDTC staff, the Planning and Economic Development Advisory Committee and EDTC Working Group, inclusive of all nine member municipalities and community partners, to support recommendation of the plan to County Council.

Actions are presented in **Chapter 2**.





Step 4: Deliver

Implement the Plan through annual workplan and budget processes.

Evaluate

The intent is not to set numerical targets, but continually work towards achieving the collective vision and goals through implementation of priority actions. The environment changes often, so maintaining the flexibility to pivot and prioritize when necessary is key.

The evaluation tools to measure success of this strategy, are purpose-built, directly into the actions of the strategy. Beginning in 2024, an Economic Development, Tourism and Culture Departmental Report will be delivered to Council annually in November. This document will include both the Economic Development and Tourism Annual Report and the Grey Roots Annual Operations Review. Timing of the departmental report will serve to both review and celebrate the past year with Council, staff and partners, while also allowing for any recommended changes to take place each year through the annual budget process.





Economic Development and Tourism

The action plan does not speak specifically to individual core and emerging sectors. Instead, Agriculture, Tourism, Manufacturing, Healthcare, Clean Energy and Creative Industries should all see themselves and be supported and advanced by drawing on various actions across the five priority areas.

Evaluation of programs and services will occur regularly, across a three-part plan:

- **Annual Leadership Forum** – where CAOs, senior leadership and elected officials will discuss and evaluate the Action Plan and its priorities, goals and actions.
- **Data Sharing Program** – the information and data collated, researched and published will be used to track changes. The Environmental Scan in Appendix 4 acts as the baseline.
- **Made in Grey Program** – will deliver an Annual Report to communicate progress with member municipalities, county staff and community partners.



Grey Roots

Progress will be advanced and tracked annually using the same concept as economic development and tourism, regularly throughout the year using a three-part plan:

- **Programs and Partnerships** – will be tracked, though quality over quantity will be held as the standard. It is important that staff develop the right programs and partnerships that drive our vision and deliver value to our community.
- **Attendance and revenues** – will be monitored the same, providing a monthly snapshot and annual statistics as provided through the Community Museums Operating Grant (CMOG) application and reporting.
- **Annual Operations Review** – will be delivered to communicate progress with staff and Council and used to recommend adjustments where necessary. This document is in addition to the Year in Review published annually for members, Council, community partners and the public.



Chapter Two

Economic Development and Tourism Priority Action Plan





Economic Development and Tourism Priority Actions

The following priority actions were developed through extensive consultation with key economic development partners, member municipalities, and county staff. The plan seriously considers the available resources, priority needs and what actions will bring the most value to our member municipalities and partners.

Priority 1: Leadership and Collaboration

Goal: Build Cohesion

Grey County takes a regional approach to economic development, tourism and culture working on behalf of all nine of our member municipalities. Everything we do happens in our municipalities for our people. Our top priority is therefore building Team Grey, where we focus on collaboration, not competition, to build trust and seed success. Collectively, we carry a stronger voice and better the likelihood of achieving goals more effectively, in a timely manner and with fewer resources required.

A cohesive vision, followed by effective and true collaboration will benefit us all.

Priority Actions:

- Host an **Annual Economic Development Leadership Forum** to build regional perspective, cohesion and pride among CAOs, senior leadership and elected officials.
- Conduct regular environmental scans to assess trends and pursue strategic **advocacy** opportunities as Grey County, with the support of municipalities and partners.
- Develop **municipal partnership and boundary adjustment case studies** to unleash mutually beneficial development and resource sharing opportunities; coordinate research; and site tours of best practice examples.
- Develop and sign a **'Team Grey' Memorandum of Understanding** with member municipalities to clearly define roles, responsibilities, resources, and expectations.

For example,
Physician
Recruitment,
Education and
Training, and
Care Economy.



Priority 2: Investment Ready

Goal: Build Capacity

Grey County is uniquely situated to help build capacity with and among our partners. We are the **great connectors**.

Taking a systems approach, we can follow the trends and lead in the development of resources. This is an important role understanding that our partners are running at full capacity, yet all investment, activity and experience happens on the ground, in our municipalities.

Priority Actions:

- Collate, research and prepare data reports to develop a **data sharing program** to serve member municipalities, partners, and businesses.
- Engage in **systems mapping** to identify the most relevant municipal, provincial, federal and industry programs that strategically align with our core and emerging sectors.
- Build shared **tools and templates** at the county level to support municipal and partner efforts, as collectively identified, from policy frameworks, such as the CIP Program, to digital marketing assets.
- Explore options to create **municipally owned employment lands**, including three large-scale industrial parks strategically positioned across the Region.
- Identify and resource **significant regional economic development projects** that will generate generational wealth, to positively impact Grey and its member municipalities.
- Strengthen **welcoming communities' infrastructure** to meaningfully integrate and retain residents.

For example,
Pumped
Storage,
Hydrogen Hub,
and Beaver
Valley Corridor.



Priority 3: Business Retention and Expansion

Goal: Build Pride

Caring for the businesses who call Grey County home is first and foremost. Here, we listen, learn, and take action in support of business. Through programs and partnerships, we set an enabling environment for our businesses to invest, create jobs and build strong, inclusive communities.

With understanding, we tackle broad issues with partners and employers to build capacity and take steps toward solving workforce, housing, childcare and transportation challenges. We also celebrate and champion our partners, businesses, and people, to build community pride.

Priority Actions:

For example, Regional Job Fair, Tourism Summit, and Local-Food Gather Campaign.

- Develop, celebrate, and promote a **Made in Grey Program**, inclusive of regular networking and education events, workshops and mixers, marketing communication campaigns and exhibits.
- Host **regional sector roundtables, tours and BR+E programs** with member municipalities and community partners to understand current trends, challenges and opportunities.
- Focus investment efforts on **core and emerging sectors** in Agriculture, Tourism, Manufacturing, Healthcare, Clean Energy, and Culture Industries.
- Collaborate with and support **Georgian College's growth as a change engine** in the region through program development, capital investment and capacity building.



Priority 4: Entrepreneurship and Innovation

Goal: Build Networks

Honing our entrepreneurial spirit is the cornerstone of this priority. It's about building networks, services, and partnerships to meet the evolving needs of our clients. As we've learned, **innovation is the only competitive advantage, everything else can be duplicated or replicated**, so it's about doing things differently and creating that Made in Grey solution.

Priority Actions:

- Position the **Business Enterprise Centre and Catapult Grey Bruce** as the region's leader to support entrepreneurs to start, expand and scale their business; strengthen the regional entrepreneurial ecosystem.
- Facilitate a **regional training and innovation network** through Sydenham Campus to coordinate resources, support local hubs and create a custom and direct pipeline to employment.
- Facilitate connections to encourage **information sharing and multi-solving** on common problems facing Grey County (internal), member municipalities and partners (external).

For example,
Launch Pad,
and Maker
Space.





Priority 5: Destination Development

Goal: Build Place

Grey County covers a significant geographic area with a diverse natural landscape; from Georgian Bay waterfront to the Niagara Escarpment to farmland, forests, and water ways, as well as urban centres, villages, and hamlets. We are a leader in tourism, attracting nearly three million visitors each year, and playing an important role in wealth creation for the region.

Tourism and culture go hand in hand, and both play a crucial role in community development and retention. It is here where the lived experience of everyday life is created and enjoyed.

Priority Actions:

For example,
Cycling and
Trails signage,
Trail Forks, and
Tourism
Brochures.

- Work with the Outdoor Management Group (OMG), municipal partners and Destination Marketing Organizations (DMOs) to develop **destination protocols**, including consistent facilities, wayfinding, messaging to improve the visitor experience and balance carrying capacity.
- Facilitate strategic investment in **tourism infrastructure**, particularly accommodations and demand generators to build-out a four-season destination.
- Lead **regional destination marketing**, including new product development and out of market promotions.
- **Communicate, promote and celebrate our diverse communities**, so visitors and new residents can see themselves here.



Chapter Three

Grey Roots Museum & Archives Priority Action Plan





Grey Roots Museum & Archives

Grey Roots Museum & Archives (Grey Roots), including Moreston Heritage Village, will celebrate its 20th anniversary in 2024. It serves to preserve and share the history of Grey County with visitors and residents, as well as act as a hub for celebrating culture and building community.

Recent trends in museums show an increased focus on displaying a diversity of perspectives, experiential learning, collaboration and sustainability. Museums are working with communities to better represent Indigenous, Newcomer, and culturally diverse voices in programs and services. Curators are looking to offer multiple access points to hands-on learning through inclusive analogue and digital interactivity. Trends include more collaboration with community groups and the use of third-party companies to deliver varied experiences. Sustainability is an ongoing issue and museums continue to explore opportunities for operational efficiencies such as changing hours of operation; better use of space including the potential for rentals and outdoor recreation; and increasing revenues, through grants, sponsorships, site and building rentals, and events.





In the next 5 years, Grey Roots will look to ways of increasing access and growing the benefits of its current assets while seeking options for cost recovery through expanded revenue opportunities. Its vision is to be recognized as a community cultural hub that sparks curiosity and a love of human and natural history and local culture. Grey Roots offers internationally renowned experiences through its travelling exhibits and acts as a gathering place for residents and visitors to understand and reflect Grey County's place in the world – past, present, and future.





Grey Roots Museum & Archives Priority Actions

Priority 1: Leadership and Collaboration

Why is this important?

Positioning Grey Roots in the foreground of culture and connection in the region, reflective of community and visitor interests is the cornerstone of this priority. We will work to be recognized as a community cultural hub that sparks curiosity and a love of human and natural history and local culture.

Priority Actions:

- Foster a **hub and spoke model** to lead by example and nurture and support regional museums, community organizations and aspiring individuals to build capacity.
- Establish relationships with the business and arts communities to enable **public-private partnerships** that support enhanced delivery of service.
- Lead as **cultural development officers** to cultivate and connect culture industries and talent across the region; promote the diverse offerings in Grey.
- Be **expert stewards** in the collection, storage and display of human, natural and living history stories and collections.





Priority 2: Inclusive Storytelling

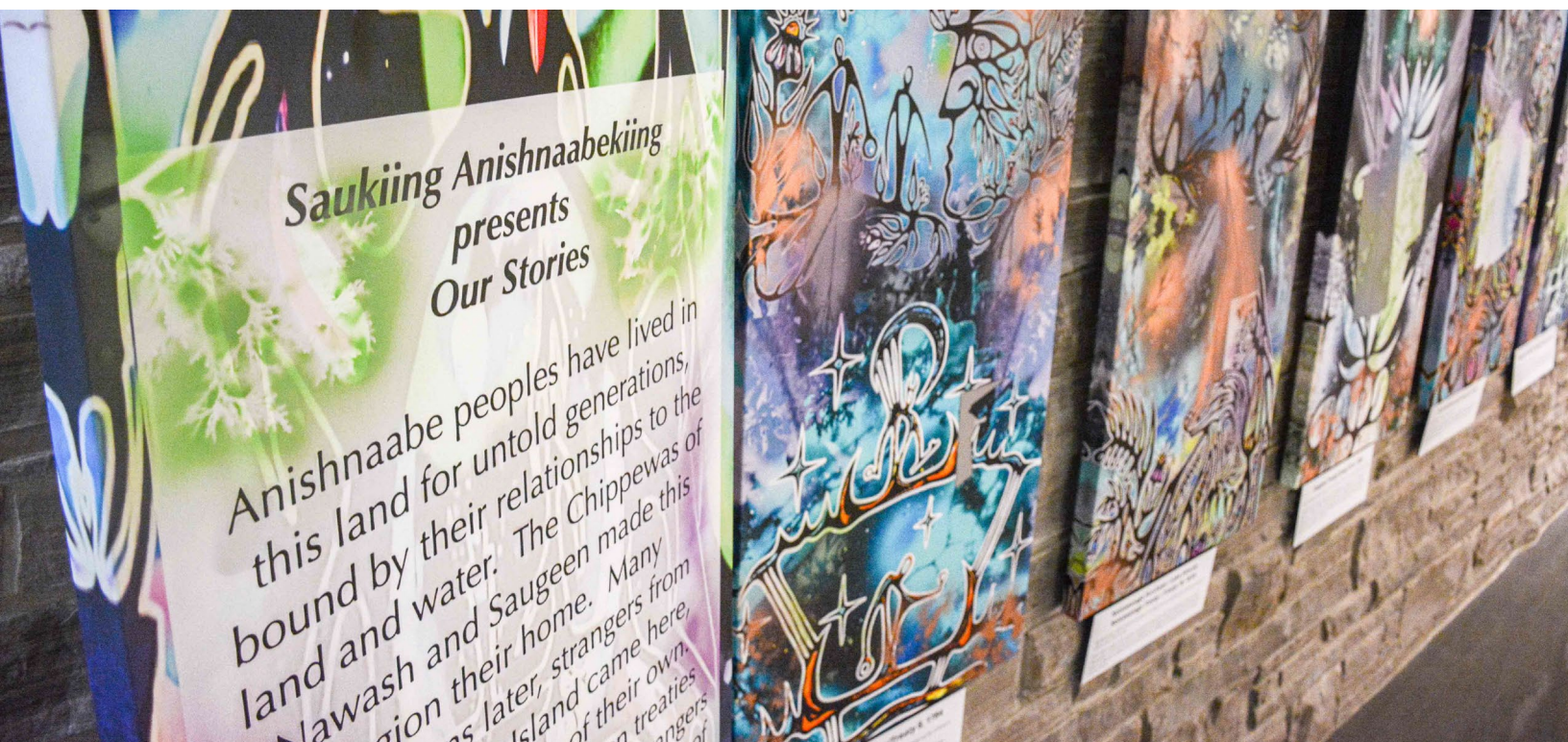
Why is this important?

Connecting with our diverse community including Indigenous, Black, Immigrant and Newcomer groups is the critical first step in engaging new audiences and presenting a more complete history. Building strong and meaningful relationships may evolve into partnerships over time, producing a more inclusive and diverse representation of Grey County.

Priority Actions:

- Continue to work with the **Indigenous Advisory Circle** for guidance and feedback to increase the representation of Indigenous history and culture in programs, exhibits, events, and capital projects.
- **Invite authentic and diverse voices** to influence, collaborate and lead programs, exhibits, events, and capital projects.
- Enhance **community cultural programming** and use of the site by community partners.
- **Nurture continued dialogue** with communities; encourage discussions; ask for advice and sincerely consider feedback.

For example,
Newcomer
artefact exhibit,
Cultural
Initiatives Fund,
and Community
Flagpole.





Priority 3: Interactive Experiences

Why is this important?

This priority focuses on further embedding interactive experiences throughout Grey Roots. This engagement model appeals to a variety of learners and can create more diverse access, both on and off-site, led by Grey Roots staff or others, to encourage memorable and connected experiences.

Priority Actions:

- Continue to develop **new interactive experiences** throughout Grey Roots for diverse visitors of all ages and abilities—physically across the site and digitally.
- Develop **expert partnerships** with individuals and community groups to lead and implement interactive, diverse programming.
- Introduce more **young family and youth** focused products and experiences to better serve and grow the priority target segments.
- Develop a **roadshow and travelling exhibit series** to embed products and experiences offsite, across the region.

For example,
Pre-teen
interactive
gallery, and
regular Village
demonstrations.





Priority 4: Destination Development

Why is this important?

Recognizing Grey Roots as a key tourism asset in Grey County, as both destination and hub of information and access underpins this priority. It's about inspiring return visits and positioning Grey Roots as top-of-mind among our community and visitors by sharing key tourism information and offering unique experiences.

Priority Actions:

For example, Enhanced picnic area, winter recreation, and revitalized Medicine Wheel Garden.

- Establish Grey Roots as Grey County's foremost **tourism information hub**.
- Utilize the substantial outdoor property to create year-round **roadside and outdoor attraction experiences**.
- Investigate opportunities to **curate an itinerary of experiences** between Grey Roots and other attractions, helping to attract overnight visitor stays.
- Explore the possibility of **creating a connecting trail link** between Grey Roots and Inglis Falls, in conjunction with the Bruce Trail to provide day long or multi day experiences.





Priority 5: Innovative Practices

Why is this important?

Through this priority, we look internally at our operations to consider how we do business, and how we can continue to do things differently. It's also about making sure all our people can access the products and services we so proudly offer.

Priority Actions:

- **Prioritize programming** over new construction to increase visitation and revenue, fully utilizing the assets already at Grey Roots.
- Work with the Niagara Escarpment Commission (NEC) to **amend property permissions** and enable further use of the property, including Moreston Heritage Village.
- Perform an **annual operations review** to understand trends, refine the business model, explore new revenue generation tools and plan for sustainable growth.
- Explore methods of **improved access and inclusion** across product and service offerings.
- Enhance **strategic target marketing** to residents and visitors, encouraging greater participation in product and service offerings, and boosting customer relationship longevity.
- In conjunction with economic development and tourism, develop a **Made in Grey program** that celebrates our present – people, place and business - bringing to life our motto **history lives here**.



Appendix





Appendix 1: Critical Issues Outside the Scope of This Master Plan

During the consultative process a number of issues were discussed that are top-of-mind for Grey County residents and partners, but do not fit within the scope of this Master Plan and are not necessarily economic development, tourism and culture initiatives. Most pertinent were the impacts of climate change on Grey County, the rising cost of housing in relation to incomes for residents, and access to transportation. These issues are discussed here, with the understanding that they are not directly accompanied by actions in this Master Plan but will be influenced by implementation of the actions.

Housing

A consistent theme across the board was the perceived lack of attainable housing. This issue is not isolated to Grey County, as it is pervasive in communities across the entirety of Canada. That does not, however, lessen the impact on current residents within the County. A lack of attainable housing means young families struggle to move to the area, employers struggle to fill roles, retired individuals are forced out of their longstanding properties, and residents facing financial struggles face uncertain housing futures, among other challenges.

Though a pressing issue for residents and business across the County, and discussed thoroughly during the consultative process, housing solutions fall outside the scope of this Master Plan. Solutions are being actioned through the Council Approved Housing Action Plan (2023).

Where this Master Plan can take action to support Housing is through innovative policy development such as the CIP Program.



Community Transportation

Access to transportation was also discussed. There was acknowledgment that the County is actively working on this priority. The Grey Transit Route began operations September 2020, and over the past two and a half years ridership has grown to 26,000 rides annually. It connects local transit in Owen Sound, Meaford, Orangeville, Collingwood, with Wiarton, Town of the Blue Mountains, Markdale, Flesherton, Dundalk, Georgian Bluffs, Chatsworth, Sauble Beach and Shelburne. Connections in Collingwood and Orangeville allow passengers to connect to GO transit and access the GTA.

Grey County pursued the Community Transportation Program funding in 2018 in response to requests from the public and community support agencies for an affordable, reliable intercommunity transportation option for residents. The terms of the funding program required the county to operate a Conventional Transit System. The County and the Township of Southgate have received just over \$3,500,000 in provincial funding to operate the system until March 31, 2025.

Grey County Staff have heard from residents and partners who shared that the current supply of taxi companies does not meet the demand for transit, and that:





- Current bylaws prohibit the opportunity for ride-share enterprises.
- There are roadblocks to provide a service that is needed in this area.
- Businesses are losing revenue due to lack of transit options for customers.
- Due to a lack of transit options employers are driving staff home after their evening shifts.
- Visitors are hesitant to dine out as they cannot get a transportation service to take them home or back to their hotel in the evening.

Based on resident feedback, Staff with Council's support will begin community consultation to learn what specific improvements, by-laws, agreements and et cetera need to be made to provide more transit opportunities for all. Where the Master Plan can support access to transportation is through industry and sector engagement, to feed current trends, along with anticipated future need to decision makers.





Climate Change

Climate Change in Canada

The current federal government and provincial governments have made commitments to reducing emissions and single-use plastics, increasing the number of electric vehicles, encouraging home retrofits, and adopting nature-based and technological solutions to clean up the environment and the economy. However, municipalities are on the front lines of climate change, and it will ultimately fall on communities to mitigate and adapt to changing climates, with changeable levels of support.

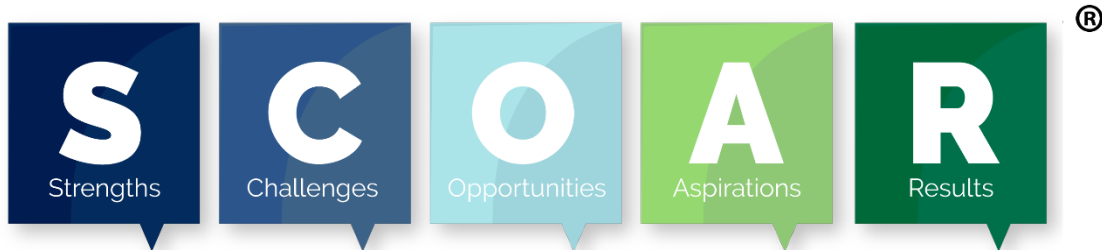
Consultations made clear that one of the greatest strengths Grey County has is its beautiful natural amenities, including green spaces, parks, conservation areas, and beaches. Residents repeatedly discussed being “close to nature” as being one of the main reasons they choose to live in the County.

As climate change begins to have more of an impact, natural resources will be impacted. Notable to Grey, the changing climate will impact lakefront developments due to potentially rising water levels and more varied weather patterns, as well as shorter seasons for traditional winter events (like skiing seasons). Considering these local impacts, respondents were asked how the County could help to ensure that the County is minimally affected by future climate change predictions. Though some respondents felt there was nothing the County could do, the majority felt that at least some initiatives should be considered. Going Green in Grey, the County's Climate Change Action Plan is actively being actioned to address these recommendations and more. Where this Master Plan can take action to support climate change directly is through supporting growth in the Clean Energy sector and encouraging sustainable tourism practices, for example.





Appendix 2: Grey County SCOAR® Analysis



The SCOAR® (Strengths, Challenges, Opportunities, Aspirations, Results) is a detailed analysis of the current situation involving statistical analysis of the local economy, regional competitive outlook, trends and forecasts, investment readiness assessment, strengths/weaknesses/opportunities review using the McSweeney exclusive SCOAR® analysis.

Strengths

Location.

- Well positioned within a commutable distance of the Greater Toronto Area.
- Proximity to Bruce Power; part of the Clean Energy Frontier.

Natural Environment and Greenspace.

- A unique and very special place in the world with the Niagara Escarpment and Georgian Bay.
- Clean water and clean air.
- Rich biodiversity and wildlife corridor for nature enthusiasts.

Quality of Life.

- Safe communities with a slower pace of life.
- People are friendly and support the community.

- Accessible indoor and four season outdoor recreational activities.
- Strong arts and culture environment.
- Community services to support the needs of the population.
- Education system offering unique programming.
- Higher education available (Georgian College).
- Live, work and play seamlessly.
- Settlement services in place to support newcomers.

Business Community.

- Balanced, diverse mix of businesses.
- Strong energy, agricultural, tourism, and service industry sectors.
- Business ecosystem locally provides access to many local suppliers.
- Entrepreneurial attitude.
- Good connectivity with businesses working together.
- Strong international reputation (for winter work) in Ireland, Germany.
- Shop local, support local attitude.



Tourism Assets.

- Best-in-the-province natural outdoor recreation activities including downhill skiing, hiking trails, scenic views, and natural water activities.
- Farm-based tourism.
- Four season tourism.

Arts and Culture.

- Grey Roots Museum & Archives and Moreston Heritage Village and its historic community assets.
- Strong local support for the arts and culture community.





Challenges

Labour Shortages.

- Attracting and retaining employees - Growing need for educators and support workers, skilled trades, physicians, health workers, et cetera.
- Difficulty in keeping young professionals in the community.
- Perception that youth must leave for higher education and often they don't come back because Grey County doesn't offer them the careers that they are looking for.

Location.

- Distance from major economic markets.
- Distribution challenge with shipping costs more expensive to and from Grey County.

Connectivity.

- Difficult securing fibre optic high-speed internet across the county because much of the county is rural in nature.
- Alternative transportation options (that is uber, taxis, public transit).

Housing.

- Attainable housing for seasonal staff.
- The pace of change for housing prices is much faster than the change for salaries.
- Affordability for young families, service workers, professionals.

Available land and buildings.

- Downtowns experience a shortage of suitable and appropriate commercial space.
- Limited shovel-ready employment lands.



Bureaucracy.

- NIMBYism over development has become a large voice through social media.
- County and municipal partners are not always on the same page.
- Niagara Escarpment Commission has limited resources that leads to slow timelines.
- Bureaucracy and red tape make development challenging.





Opportunities

More Diversified Economy.

- Health care.
 - Supporting education locally through Georgian College and linking direct to local employers.
 - Isotopes for local health-related opportunities (such as research in colleges, universities, hospitals).
- Clean Energy.
 - Nuclear, Pumped Storage, Hydrogen.

Agriculture.

- On-farm processing plants; specifically, abattoir capacity.
- Sustainable agriculture.
- Farm-to-table opportunities through all parts of the food chain, including farm tours and gate sales, local food products, restaurants, markets, and seasonal events.
- Education and awareness through networking, campaigns and education (For example, Share the Road).

Tourism and Culture.

- Better coordinated tourism program.
- Enhancing the food experiences using the culinary talent and food in the area.
- Use Grey County brand to support local talents.
- Eco tourism and low impact tourism.
- Use Talisman and Wiarton Airport as economic drivers.
- More cultural activities involving talented local artists and craftspeople, plus historical information.
- Developing Grey Roots as a cultural centre.



Improved Downtowns and Main Streets.

- Connect the small communities.
- Revitalize and improve downtowns and main streets to support local residents and visitors.

County and Partner Municipalities Working Together.

- Develop consistent policies and processes, development, growth, and approvals throughout all the member municipalities.
- Streamline approval processes.
- Reduce duplication.

Supporting Business.

- Attract labour force to support local business needs.
- Develop equity, diversity and inclusion strategies to attract more people and to help people understand what it means.
- Ease of start-up for business.
- Work from home option available.
- Provide shovel-ready employment lands.



Protecting the Natural Environment and Reducing the Impact of Climate Change.

- Be a leader in sustainability.
- Focus on 'being green' including having green strategies, green energy, green technologies, ecotourism, green transportation, and green industry.





Aspirations

Grey County will...

- Be forward thinking and future ready.
- Be innovative and entrepreneurial.
- Be connected and integrated with our partners across the county.
- Have a diversified economy, focused on clean energy, agriculture, tourism, manufacturing, health care, and culture industries.
- Embrace policies that support equity, diversity, and inclusion in our communities.
- Focus on sustainability, including supporting clean energy industries and sustainable tourism.
- Be sensitive to our landscape and protect the environment and natural beauty of the County.
- Have vibrant downtowns/main streets that attract residents and visitors.
- Continue to preserve our agricultural roots and support our local farmers.
- Grow and sustain a world-class, four-season tourism sector.
- Celebrate Grey's people, culture and heritage.
- Continue to have the small-town feeling, be peaceful and safe.
- Know who we are and stay true to that.





Results

Grey County in connection with our Member Municipalities will be active as Team Grey, where we collaborate through trust and seed mutual success. We will speak with one voice and achieve goals effectively, in a timely manner and with fewer resources. Grey County will share a cohesive vision that is carried out through effective and true collaboration to benefit us all.

Grey County and its partners will have access shared tools and resources at their fingertips and have moved from investment readiness to attraction.

Grey County will further diversify, moving clean energy, healthcare and culture industries from emerging to core sectors, joining alongside agriculture, manufacturing and tourism as our robust and foundational economy.

Grey County and its partners will continue to flex their innovative and entrepreneurial muscle through Sydenham Campus, to feed thriving regional networks.

Our world-class four-season destination is being built through well planned investment, enriching the lives and experience of all visitors and residents alike.





Appendix 3: Grey Roots SCOAR® Analysis

The Grey Roots Museum & Archives' comprehensive SCOAR® analysis was compiled and used as the fundamental basis to determine the strategic themes as collected through the consultation process.

Strengths

- Strong volunteer base with good skill sets such as vehicle repair and blacksmith.
- Knowledgeable and informative staff.
- Excellent facility.
- Large site with ample parking.
- Moreston Heritage Village.
- Heritage is preserved and provides a connection to local history.
- Provides education and opportunity to research ancestry.
- Family focused events.
- Contributes to tourism.





Challenges

Exhibits

- One sided, settler-focused exhibits – opportunity for more Indigenous, Black, and newcomer-focused content.
- There is a perception that exhibits don't change often enough and lack a permanent 'wow' factor.

Awareness

- Not enough people (both locals and visitors to Grey County) are aware of Grey Roots.
- Programming schedule needs to be communicated within the facility and to the public in a timely manner.

Resources

- Heavy reliance on aging volunteer base for operations.
- Maintaining infrastructure is costly.
- NEC approvals limit commercial activity and revenue generation.
- Staffing becomes more of a challenge as the Moreston Heritage Village grows.

Programs

- Lack of adult-oriented events and workshops.
- More fun, interactive, hands-on experiences needed for children.

Accessibility

- Moreston Village is only accessible in the summer.
- Car-oriented location.
- Cost for admission, events, research is a barrier for some people to attend.



Opportunities

Exhibits

- Continue to develop exhibits in collaboration with Indigenous, Black and immigrant communities that show parallel histories and intersections.
- Create interactive exhibits for children.
- Take exhibits on the road to showcase Grey Roots.

Programs

- Expand on adult workshops to teach skills such as canning, quilting, and genealogy searches.
- Have Indigenous community lead programs such as traditional territorial walks, beading, Treaty making, and weaving.
- Partner with other service providers for community events on site.

Awareness

- Establish greater social media presence.
- Improve signage.
- Have pop-up displays at community events.
- Animate the site: offer public gathering infrastructure such as umbrellaed picnic tables, more interpretive displays, hands-on children's activities, and seating areas in the parking lot.

Partnerships

- Establish relationships and partnerships with local communities including Indigenous Nations (not just individuals), Black, and immigrant and involve associated subject matter experts in programming at Grey Roots.
- Collaborate with regional facilities including museums, arts and cultural organizations, Bruce Trail Association, and et cetera.
- Explore involvement of students from high schools and Georgian College.
- Link Grey Roots to the natural environment (such as a trail through to Inglis Falls) and consider joint marketing/use of parking lots.



Buildings

- In the next five years, prioritize new programming and broader content over traditional colonial construction.
- Consider multi-purpose building(s) that could be used for exhibits, events, workshops, et cetera.

Funding

- Negotiate a blanket approval with NEC for defined activities on site.
- License third party service providers for events such as ghost walks, winter markets, wine-tastings, and et cetera.
- Explore grant opportunities and/or sponsorships for targeted capital projects such as a trail from Grey Roots to Inglis Falls.



Aspirations

Grey Roots Museum & Archives will...

- Collect, preserve, and present local historical artefacts and archival materials that represent the diverse communities in Grey County.
- Develop strong, collaborative partnerships with local communities, institutions, and organizations.
- Provide intriguing, interactive experiences, information, workshops, and events that reflect the interests of residents and visitors.
- Explore creative revenue opportunities through sponsorships, partnerships, grants and third-party licensing.





Results

Grey Roots sits in the foreground of culture and connection in the region, leading by example and assisting others to build capacity.

Diverse relationships and partnerships are established and incorporated into the heart of operations of Grey Roots.

Experiential learning is achieved through workshops, interactive displays and different methods of programming using arts, technology, and skills.

Grey Roots is a top-of-mind destination for tourists and residents to learn, experience, connect and reflect.

Grey Roots has more control over site use and can generate more revenue through diverse offerings, driving increased attendance.



Appendix 4

Situational Analysis and Comparative Analysis





SITUATIONAL ANALYSIS

for **Grey County**



McSWEENEY

inspiring economic sustainability®



Situational Analysis

for Grey County

April 2023



McSweeney & Associates
201-900 Greenbank Road
Ottawa, ON K2J 1A8
T: 1-855-300-8548
E: consult@mcsweeney.ca
W: www.mcsweeney.ca



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EXECUTIVE SUMMARY

This Grey County Situational Analysis is being completed as part of a broader Economic Development, Tourism and Culture Master Plan. This report is an informational piece crafted in early 2023 and does not prescribe a certain solution; instead, it presents a reality or statistical perspective within the local context. As the data within this document was gathered during the COVID-19 pandemic, certain figures may be suppressed or heightened due to the pandemic's unique conditions.

This Analysis begins with an assessment of the people (socio-demographics) that make up Grey County to provide a snapshot of the local population. This data can be used to inform decision-making; for example, Grey County has a sizable population of residents over the age of 55 (i.e., nearing retirement), which, if this demographic remains, suggests the County may soon require an increase in seniors' amenities.

Next, by profiling housing and income levels, a snapshot is created of the County's current "livability". Notably, while many residents feel housing prices are unsustainably high, compared to the province more broadly, housing costs are lower. This suggests that although housing costs in the County are high (especially in certain sub-County level jurisdictions), they are still more affordable than the province on average.

Section 2 pivots to an assessment of the local labour force, presenting key performance indicators related to participation, unemployment, and employment rates. Impressively, Grey County's female and male populations have similar levels of economic engagement, a rarity within the province. We then present information related to the number of residents employed by occupation and industry classification, as well as labour commuter patterns, both at the County and sub-County levels.

Section 3 of the Situational Analysis reviews the local economy using the reverse lens; rather than assessing data based on local residents (regardless of where they work), this section reviews data based on local industry and employment data, regardless of where their employees live. Once more, an assessment by industry is done to identify key industries and jobs that can be leveraged to support future community goals and aspirations and match them up with current, and emerging, community and economic drivers. The report further includes an assessment of current businesses by size and leading industries, outlining a broad picture of the makeup of local business.

Finally, a local analysis is presented, comparing Grey County's economy to the neighbouring Counties of Simcoe and Bruce. While some similarities exist, this exercise also highlights how each of the three Counties is quite distinct from the other.

Grey County Economic **SNAPSHOT**



89,073

2001

92,411

(3.7%)

2006

92,568

(0.2%)

2011

93,830

(1.4%)

2016

100,905

(7.5%)

2021

Population Profile

MEDIAN

AVERAGE

County Age

49

County Age

46

Ontario Age

41

Ontario Age

42

Apprenticeship/trades
certificate/diploma

9%

No certificate, diploma/
degree

15%

University diploma/
degree - bachelor or above

19%

College or other
non-university certificate

28%

High school certificate
or equivalent

29%

Highest Education

Population ages 25-64



29%
Secondary

56%
Post-secondary

Household & Earnings



24%

ONTARIO
28%

of Grey County's population spends
30% or more of household gross
income on shelter costs.



Average Dwelling Value*

\$998,225

Median Dwelling Value*

\$795,254

*These figures are sourced from Manifold SuperDemographics and should not be compared directly to other sources, as their methodologies are different.

78%

Single detached house

14%

Apartment / detached duplex

5%

Rowhouse

2%

Semi-detached
house

Total number of households

43,980

Grey County Economic **SNAPSHOT**



Labour Force & Local Economy

Median
Employment
Income

Average
Employment
Income

\$35,079

\$50,207

ONTARIO MEDIAN
\$37,844

ONTARIO AVERAGE
\$54,047

PARTICIPATION RATE*

ONTARIO
65.1%

61.0%

EMPLOYMENT RATE*

ONTARIO
59.2%

57.4%

UNEMPLOYMENT RATE*

ONTARIO
9.1%

5.9%

*Engagement rates are from 2022 and should be used with caution due to the influence of the pandemic.

Top 5 Sectors by Industry**



Health Care &
Social Assistance
(7,155)



Manufacturing
(6,409)



Retail Trade
(6,306)



Construction
(4,986)



Agriculture, Forestry,
Fishing & Hunting
(3,549)

Top 5 Sectors by Occupation**

** By labour force employment.



Sales & Service
(10,991)



Trades, Transport
& Equipment
Operators
(9,285)



Management
(7,137)



Business, Finance
& Administration
(6,891)



Education, Law &
Social, Community &
Government Services
(5,874)

DATA SOURCES

Please note that every effort has been made to use the most current data available. There are four major sources of information for the remainder of this document:



- The 2001 to 2021 Census from Statistics Canada.
- Canadian Business Registry (CBR) - December 2021
- SuperDemographics 2022 from Manifold Data Mining Inc.
- EMSI Analyst 2022.Q1

Canadian Business Registry (CBR)

The major sources of information for the business registry are updated from the Statistics Canada survey program and Canada Revenue Agency's (CRA) Business Number account files. This CRA administrative data source allows for the creation of a complete set of all business entities.

Manifold Projection Method

Production of 2022 Demographic data estimates is partially based on population statistics collected by the Statistics Canada Census Program. Manifold estimates demographic data annually, including population projections for 5 and 10 years in the future. Manifold methodologies are based on the following techniques:

- Enhanced cohort survival methods;
- Nearest neighbourhood and regression techniques; and
- Structural coherence techniques.

Manifold Data Sources include:

Statistics Canada	Real Estate Boards/Companies
Health Canada	Canadian Bankers Association
Regional Health Ministries	Bank of Canada
Citizenship and Immigration Canada	Canada Post Corporation
Regional School Boards	Consumer and business directories books
Flyer Distribution Association	Proprietary survey and research
Publication of hospitals, CMHC, BBM and partners	

EMSI Analyst

EMSI data brings the various snapshots of the Canadian economy together in a single picture. First, it aligns the geographies of the data from 2001 to the present, which means the Grey County of 2001 is the same as the Grey County of 2002. This results in geographically detailed data (down to the Census Subdivision level) that apply to today's economy.

The data is remarkably detailed, providing information on 305 industry classifications using the North American International Classification System (NAICS) system and 522 occupations from Statistics Canada's National Occupational Classification (NOCs) classification system in over 4,300 integrated geographical areas. The data is updated twice a year, so users have the most current information possible. Finally, in addition, it adds 10-year projections based on the CBR data so that it provides an idea of the future alongside the past and present.

EMSI Data Sources include:

Canadian Business Registry (CBR)

2001-2021 Census data

Survey of Employment, Payroll and Hours (SEPH)

Labour Force Surveys (LFS)

Canadian Occupational Projection System (COPS)

CANSIM Demographics

Post-secondary Student Information System (PSIS) Education Data



1. DEMOGRAPHIC ANALYSIS

1.1. Population Growth

This subsection illustrates population characteristics for Grey County. The wider economic landscape relevant to the region is explored by using **Ontario as a benchmark**.

Table 1 illustrates population changes in Grey County from 2011 to 2032, compared to Ontario. The census population in Grey County grew slightly from 2006 to 2016 (1.5%) but subsequently grew by 7.5% over the ensuing five-year period, from 93,830 residents in 2016 to 100,905 in 2021. Over the next decade, Grey County's population is projected to grow at a similarly rapid pace, nearing 120,000 residents by 2032.¹

Table 1: Population Change, Grey County and Ontario, 2011-2032

	2011	2016	2021	2022*	2027	2032
Grey County Population Count	92,568	93,830	100,905	105,831	111,959	117,993
% Change	0.17%	1.36%	7.54%	/	5.79%	5.39%
Ontario Population Count	12,851,821	13,448,494	14,223,942	15,000,360	15,859,881	16,716,314
% Change	5.70%	4.60%	5.77%	/	5.73%	5.40%

Source: Statistics Canada Census Profiles 2011-2021; 2022-2032 Growth Manifold SuperDemographics.

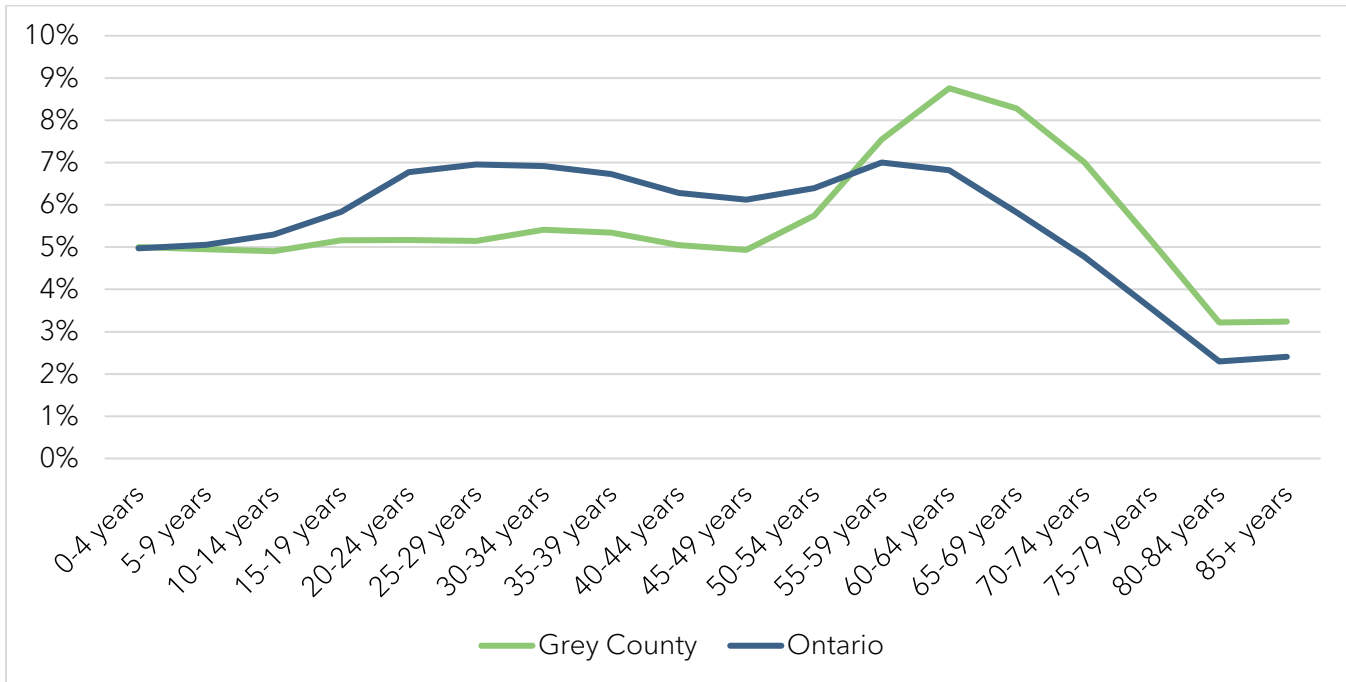
*Please note that 2022-2032 uses a different data source than 2011-2021, and due to differing methodologies, these sources are not directly comparable. We, therefore, do not provide a % change for these years.

**The population in Grey County is
projected to grow by 11.5%
between 2022 and 2032.**

¹ Manifold SuperDemographics data presented within this document should not be directly compared to other data sources due to differing methodologies and sources.

Figure 1 contrasts the age profile of residents in Grey County and Ontario, in 2022. Grey County has a comparable percentage of youth (under 14) and a much larger older population (55+ individuals). However, Grey County is lagging behind the provincial benchmark in young adults and middle-aged individuals (15-54).

Figure 1: Percent Population by Age, Grey County and Ontario, 2022



Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022.

Overall, Grey County's working-age population (ages 15-64, 58.3%) is lower than Ontario's (65.8%), with a comparative increase in retirement-aged individuals (65+).

2022 Age Profile Snapshot ²		
Age Group	Grey County	Ontario
0-14	14.9%	15.3%
15-64	58.3%	65.8%
65+	26.9%	18.8%

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022.

² Please note, throughout the document various totals may not add up to 100%, and subtotals may not add up to broader totals. These discrepancies are due to methodological rounding.

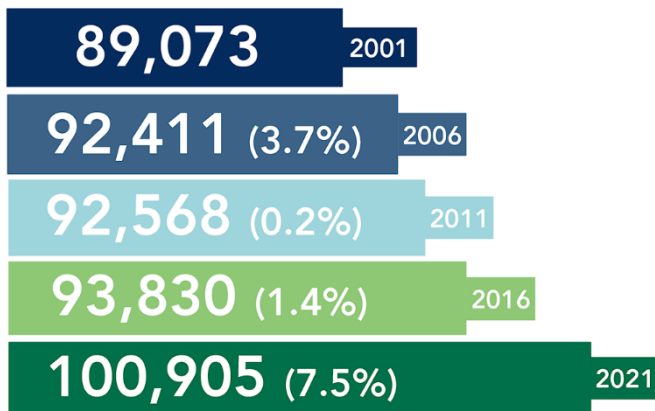
The median age of the County's male population is approximately three years younger than their female counterparts (47.2 compared to 50.5).

2022 Grey County Age Profile Snapshot		
Age Group	Male	Female
0-14	15.4%	14.3%
15-64	59.2%	57.4%
65+	25.4%	28.3%

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022.

THE BOTTOM LINE

GROWING POPULATION



After relatively slow growth from 2001-2016, **Grey County saw growth above 7% between 2016 and 2021**. These aggressive growth rates (>5%) are projected to continue through 2032.

Grey County has a current population that is **significantly older than Ontario's** (median age of 49 compared to 41 in Ontario).

MEDIAN AGE



Given these dynamics, the County may need to be prepared to encourage an influx of younger, working-aged individuals (and young families) or be prepared to offer significant elderly-service amenities.

1.2. Income, Households and Attainability

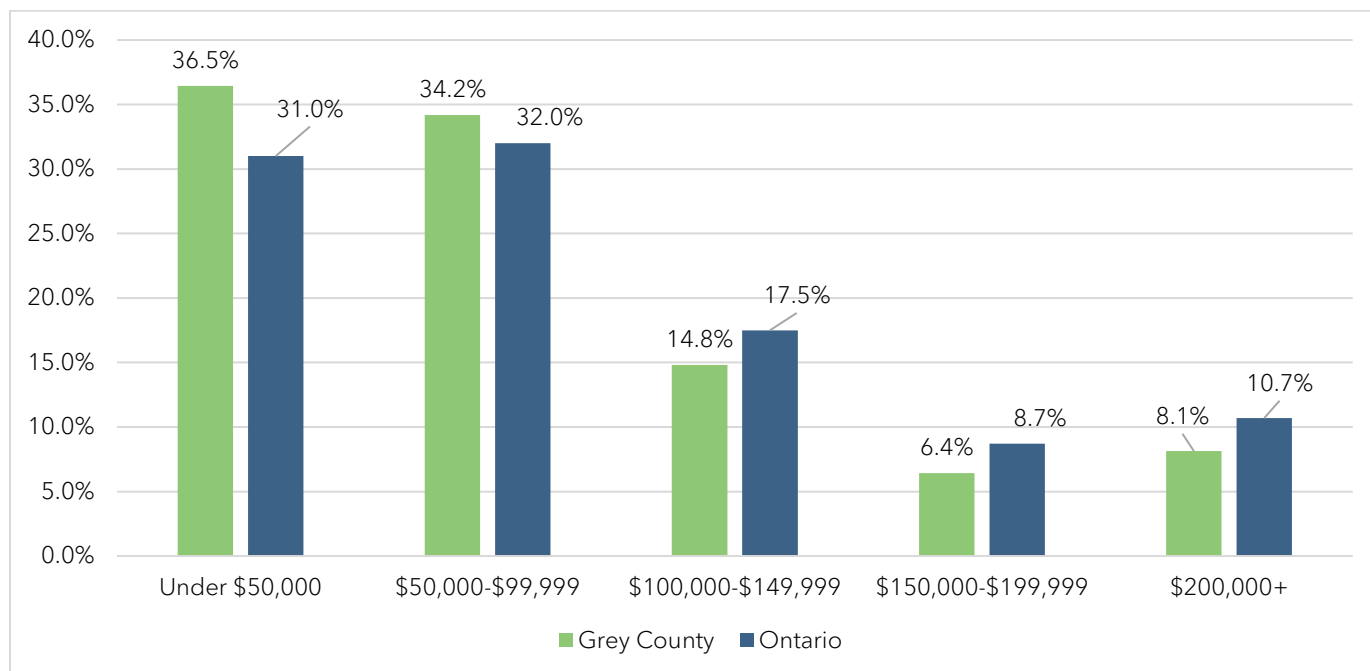
This subsection describes income, households and housing costs of the population. This information is relevant within the context of economic development planning because it provides an understanding of whether a region has attainable housing for resident labour – a key factor in residential and labour force attraction and retention. With regard to employment income, the following observations can be made³:

- In 2021, **Grey County's median employment income was \$35,079**, 8% lower than in Ontario (\$37,844).
- In 2021, the **average employment income for Grey County residents was \$50,207** also 8% lower than in Ontario (\$54,047).

Figure 2 on page 6 illustrates the distribution of household incomes. Approximately 70.6% of households in Grey County earn less than \$100,000, compared to 62.9% in Ontario.

- Median household total income in Grey County: \$74,962 vs. \$84,052 in Ontario.
- Average household total income in Grey County: \$96,154 vs. \$109,992 in Ontario.

Figure 2: Household Income Levels by Percentage of the Population, 2021



Source: Manifold Data Mining Inc. 2022 (2021 incomes).

³ All income data uses the year previous; therefore 2022 data uses 2021 incomes.

On average, the residents in Grey County have slightly lower levels of employment and household income compared to Ontario. The community in Grey County, though, offers more favourable costs of housing. Table 2 and Figure 3 highlight key housing characteristics. Compared to Ontario, Grey County has a lower cost of housing (especially concerning rented dwelling costs) and fewer residents spending over 30% of their total income on shelter costs. Furthermore, while Grey County has less dwelling diversity (Figure 3) than Ontario as a whole, Ontario's data is skewed considerably by larger urban centres. Grey County's dwelling diversity compares favourably to similarly sized communities.

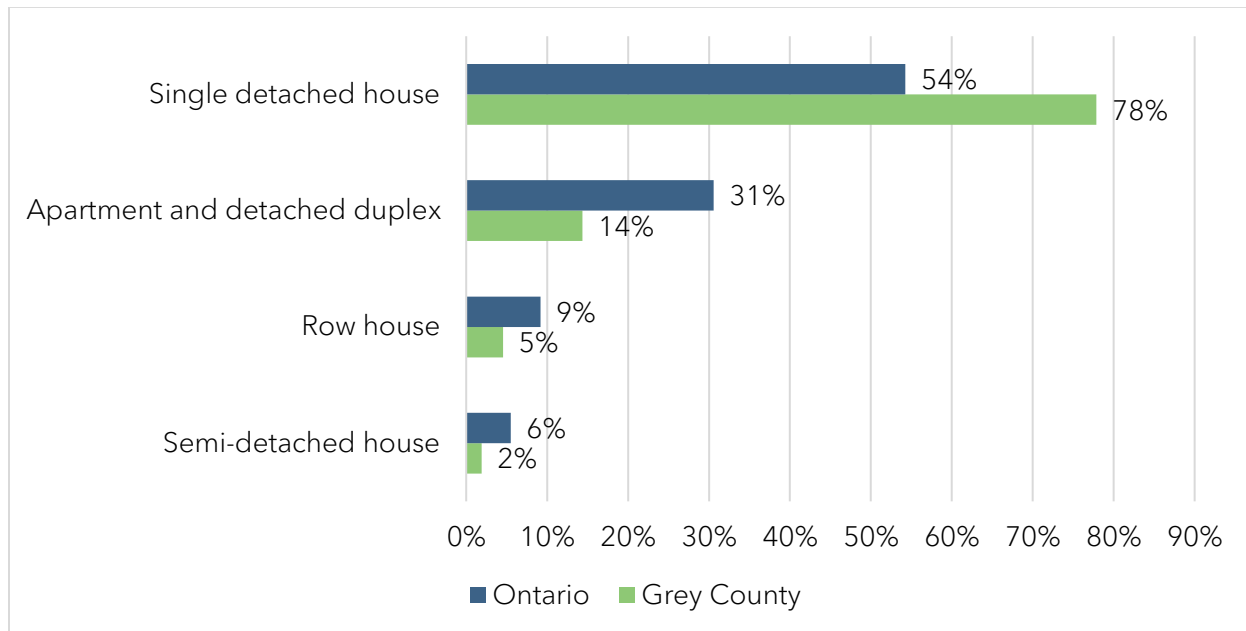
Table 2: Households and Dwelling Attainability, 2022

Housing Characteristics	Grey County	Ontario
Total Number of Households	43,980	5,745,955
Average value of dwelling (\$)	\$998,225	\$1,021,430
Median value of dwellings (\$)	\$795,254	\$860,457
Median monthly shelter costs for rented dwellings (\$)	\$949	\$1,108
Average monthly shelter costs for rented dwellings (\$)	\$1,016	\$1,220
% of households owned	77%	70%
% of households rented	23%	30%
Average number of persons in private households	2.35	2.57
Population spending 30% or more of household total income on shelter costs	24%	28%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022.



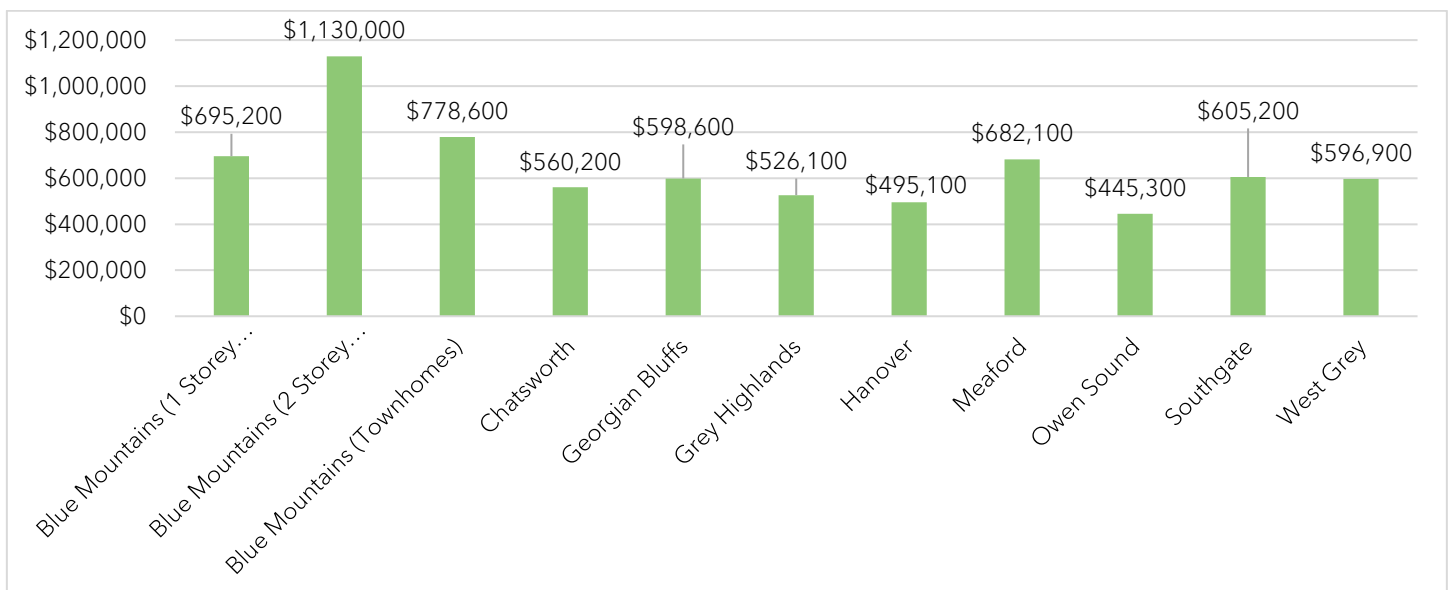
Figure 3: Occupied Dwellings by Structure Type, 2022



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022.

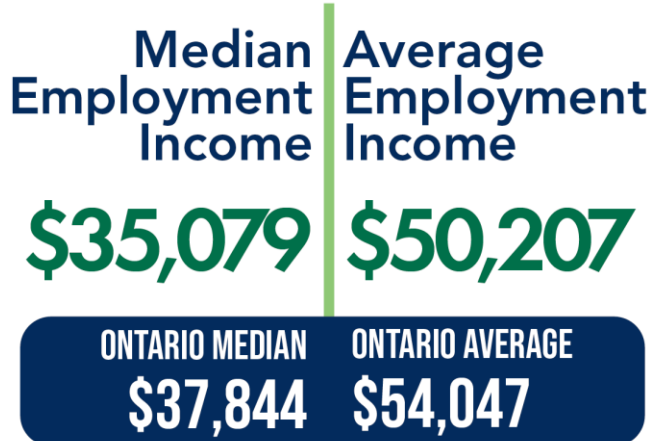
When discussing housing prices across the County, it should be noted that waterfront and near waterfront communities are facing more distinct pricing challenges. While the average dwelling value noted by Manifold was \$998,225, Canadian Real Estate Association data from February 2023 suggests only sales in Blue Mountain rise above that level, with many communities seeing sales near \$500,000.

Figure 4: Average Value of Sales within Grey County's Partner Municipalities (Composite, Unless Otherwise Noted)



Source: Canadian Real Estate Association, Through Grey County Staff.

THE BOTTOM LINE



Residents had slightly lower (8%) median and average employment incomes in 2021, compared to employment incomes across Ontario.



However, Grey County is comparably affordable relative to Ontario, with fewer residents spending 30% of their household total income on shelter costs (24% of residents locally, compared to 28% across the province).



24%

ONTARIO
28%

of Grey County's population spends 30% or more of household gross income on shelter costs.



Housing prices vary considerably across the County, with houses along and near the waterfront and larger urban centres being considerably more expensive.

78%
Single detached house

14%

Apartment / detached duplex

5%

Rowhouse

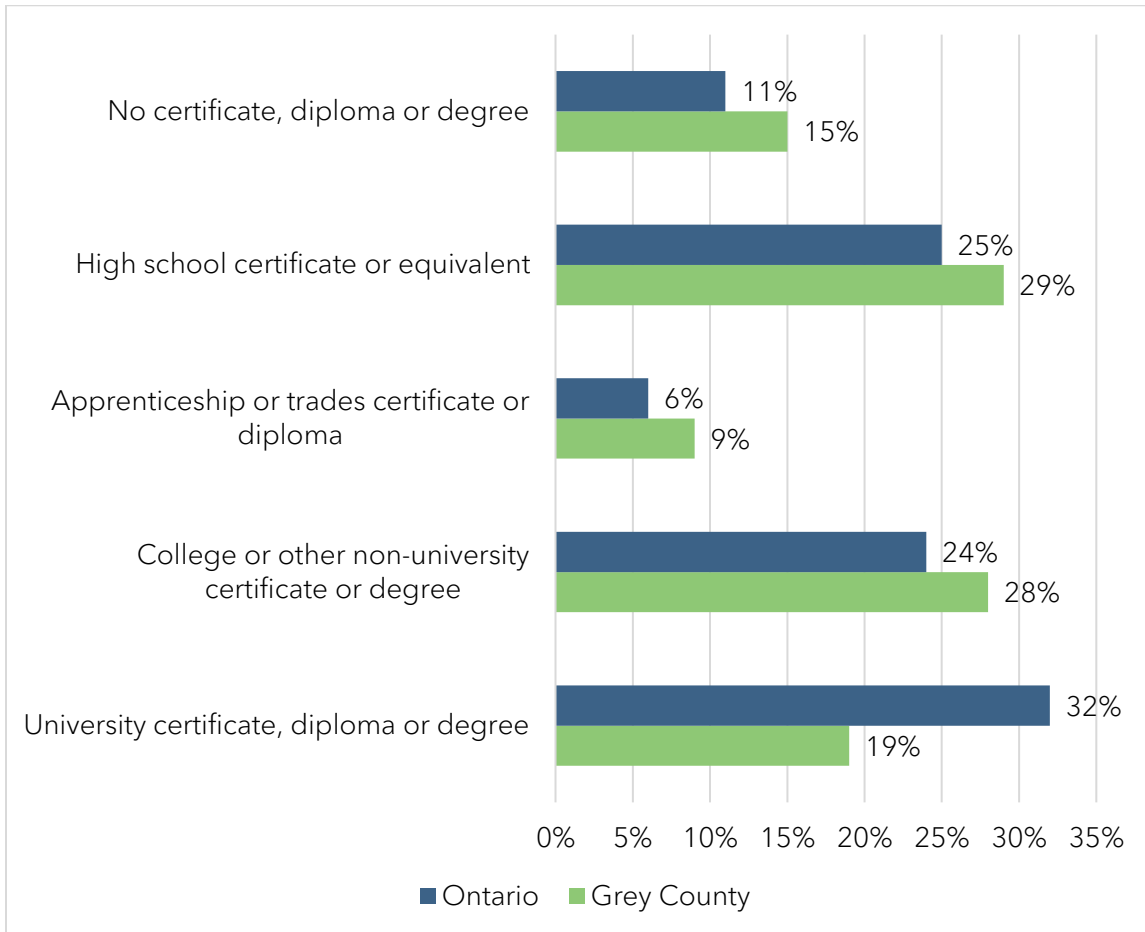
2%

Semi-detached house

1.3. Education, Skills and Training

This subsection reviews the level of education and major fields of study for residents of Grey County and Ontario. Figures 4 and 5 outline the education levels obtained by Grey County residents ages 25-64, as compared to Ontario. Definitions may be found in the footnote.

Figure 5: Educational Attainment Breakdown, Residents Ages 25 to 64, 2022⁴



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022.

⁴ 'High school diploma or equivalent' includes persons who have graduated from a secondary school or equivalent. It excludes persons with a post-secondary certificate diploma or degree.

'Post-secondary certificate diploma or degree' includes 'apprenticeship or trades certificates or diplomas' 'college CEGEP or other non-university certificates or diplomas' and university certificates diplomas and degrees.

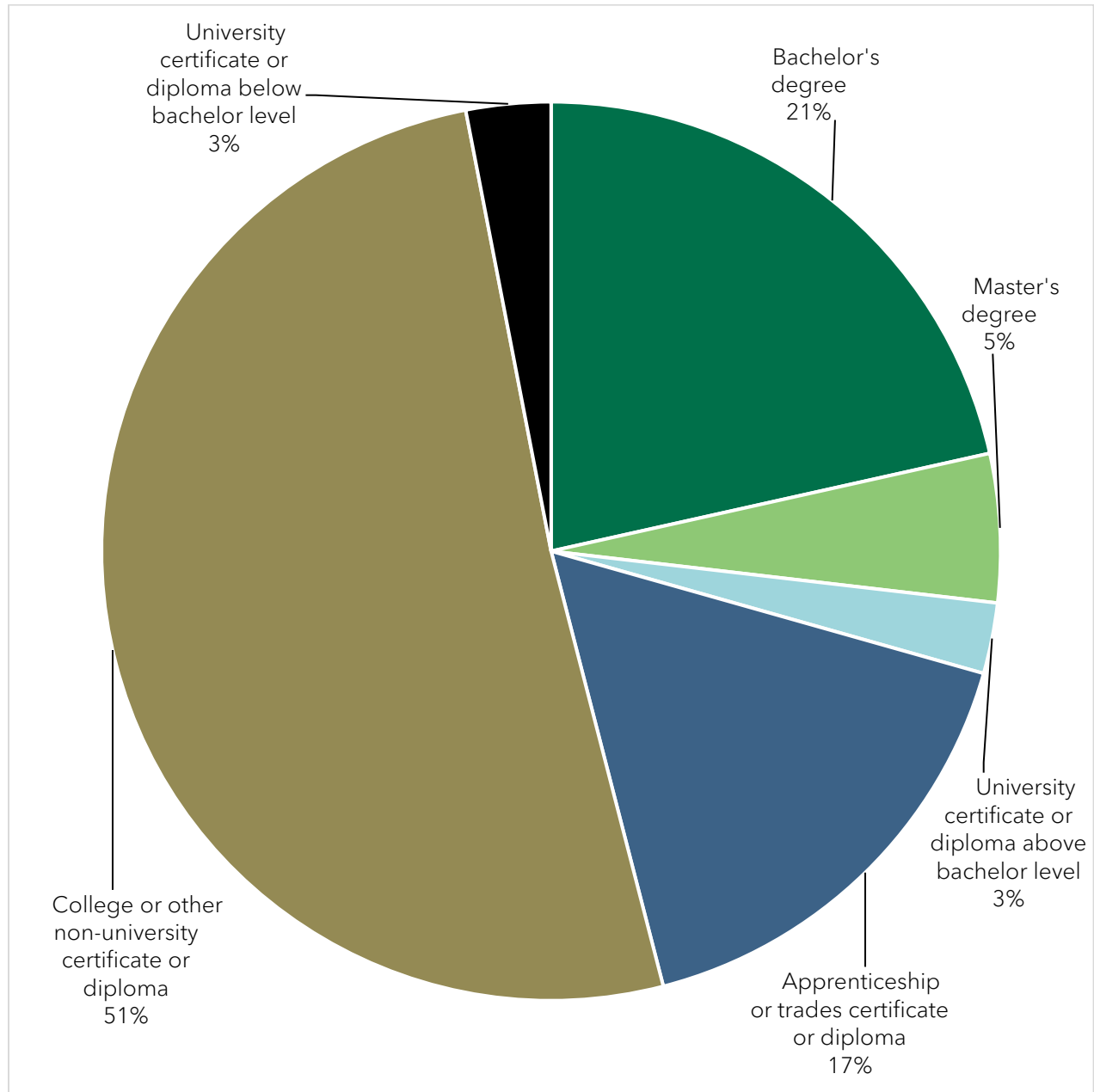
'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates.

'University certificate diploma or degree includes the categories 'University certificate or diploma above bachelor level' 'Degree in medicine dentistry veterinary medicine or optometry' 'Master's degree' and 'Earned doctorate.'

Figure 5 illustrates the post-secondary educational attainment of Grey County residents ages 25 to 64. Based on Figure 5, it can be concluded that:

- A total of 28,417 residents aged 25 to 64 have post-secondary education.
- A college degree is **the most common type of education**; attained by half (50% - 14,285 residents) of residents with a post-secondary education, aged 25 to 64.

Figure 6: Percentage of Residents aged 25-64 with Post-Secondary Attainment, 2022



Source: McSweeney & Associates from Manifold SuperDemographics 2022.

Table 3 illustrates the major fields of study with at least 200⁵ graduated residents 15 years and older. It is collected for the highest certificate, diploma or degree above the secondary school level. The largest fields of study in the population are 'Health professions and related programs' and 'Business, management, marketing and related support'.

Table 3: Post-Secondary Major Field of Study, Grey County, 2022

Classification of Instructional Programs (CIP)	Total	Female	Male
Total	90,111	46,038	44,073
<i>No postsecondary certificate, diploma or degree</i>	<i>45,076</i>	<i>22,309</i>	<i>22,767</i>
Health professions and related programs	7,671	6,688	983
Business, management, marketing and related support services	6,692	4,192	2,500
Education	3,238	2,466	771
Mechanic and repair technologies/technicians	2,825	64	2,761
Construction trades	2,371	67	2,304
Personal and culinary services	1,987	1,371	617
Engineering technologies and engineering-related fields	1,987	140	1,847
Visual and performing arts	1,451	892	560
Social sciences	1,355	749	606
Agriculture, agriculture operations and related sciences	1,330	336	994
Precision production	1,146	37	1,110
Family and consumer sciences/human sciences	1,142	1,011	132
Engineering	969	88	881
Computer and information sciences and support services	895	394	500
Security and protective services	877	186	691
Parks, recreation, leisure and fitness studies	835	517	319
Public administration and social service professions	813	661	151
Legal professions and studies	737	505	232
Transportation and materials moving	690	142	549
English language and literature/letters	658	420	238
Psychology	606	457	149
Liberal arts and sciences, general studies and humanities	571	363	208
Biological and biomedical sciences	517	250	267
Natural resources and conservation	481	140	341
Physical sciences	339	126	213
Theology and religious vocations	330	166	164
History	297	145	152
Architecture and related services	271	53	219

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022.

⁵ 'Major Field of study' is defined by Classification of Instructional Programs (CIP) 2016 for the population aged 15 years and over in private households. It is collected for the highest certificate, diploma or degree above the high school or secondary school level: www.statcan.gc.ca/concepts/classification-eng.htm.

THE BOTTOM LINE

Apprenticeship/trades
certificate/diploma **9%**

No certificate,
diploma/degree **15%**

University diploma/
degree - bachelor or above **19%**

College or other
non-university certificate **28%**

High school certificate
or equivalent **29%**



Grey County residents are more likely to have a College or other non-university certificate or degree than their Ontario counterparts (28% compared to 24%) and correspondingly less likely to have a university certificate, diploma or degree (19% compared to 32%).



This suggests that businesses relying on more technical skills learned at non-university post-secondary institutions are more likely to find relevant skills and educational levels among the available labour pool.



2. LABOUR FORCE PROFILING & ANALYSIS

2.1. Key Indicators

Grey County has a labour force of 55,030 individuals. Grey County has slightly lower participation, employment, and unemployment rates relative to Ontario.



This is to be expected given the slightly older population in Grey County, as it suggests that many residents are outside the labour force and uninterested in pursuing employment (perhaps explained by retirement).

Table 4: Key Labour Force Statistics by Gender, Grey County, 2022

Labour Force Activity	Grey County			Ontario		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	90,111	44,073	46,038	12,701,375	6,183,030	6,518,345
In the labour force	55,030	28,529	26,501	8,275,729	4,284,717	3,991,011
Employed	51,763	26,814	24,949	7,521,911	3,912,075	3,609,836
Unemployed	3,267	1,714	1,552	753,818	372,643	381,175
Not in the labour force	35,081	15,544	19,537	4,425,647	1,898,313	2,527,334
Participation rate %	61.1	64.7	57.6	65.2	69.3	61.2
Employment rate %	57.4	60.8	54.2	59.2	63.3	55.4
Unemployment rate %	5.9	6.0	5.9	9.1	8.7	9.6

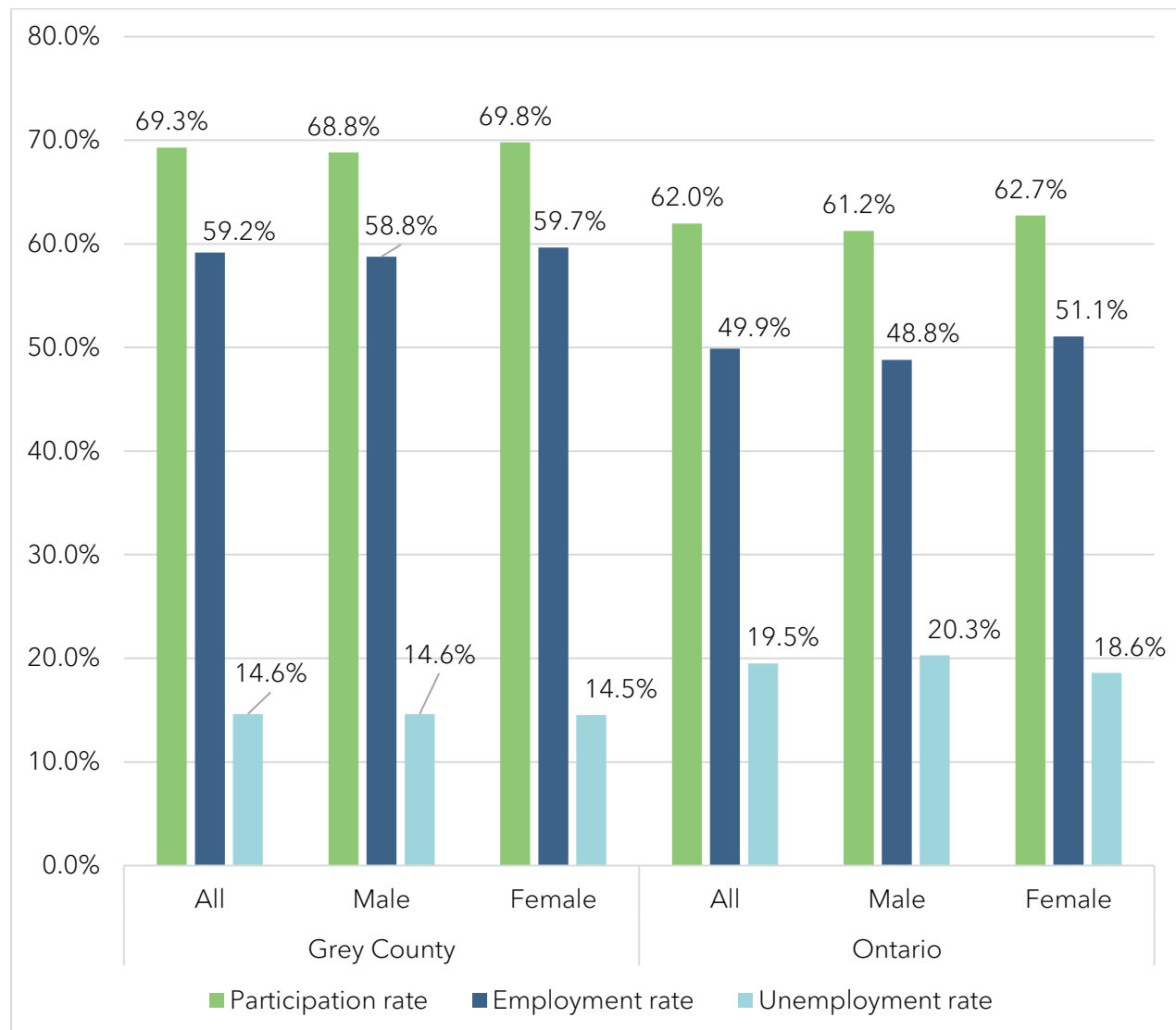
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2021.

Grey County has a significantly smaller unemployment rate than Ontario.

Key labour force indicators can be further broken down by age and sex and used to highlight underemployed/underutilized labour groups. Grey County has a low youth unemployment rate (ages 15 to 24, see Figure 6), being a full 5% lower than the provincial rate (19.5% provincially compared to 14.6% locally). Male and female youth in Grey County have comparable unemployment rates (14.6% and 14.5%, respectively). These are impressively similar figures compared to traditional gaps that are seen in many communities across Ontario.

Figure 6 further illustrates that youth in Grey County are actively engaged in the labour force compared to youth in Ontario, evidenced by a participation rate (69.3% locally) that is over 7% higher than the provincial mark.

Figure 7: Labour Force Statistics by Gender, Population 15 to 24, 2022



Source: Manifold SuperDemographics 2022.

The following table illustrates labour force characteristics for youth (15 to 24) and mature adults (25 and older) in Grey County, benchmarked against Ontario data.

Table 5: Labour Force Characteristics by Age and Gender, 2022

	Population 15 to 24 years old:					
	Grey County			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	69.3	68.8	69.8	62.0	61.2	62.7
Employment rate (%)	59.2	58.8	59.7	49.9	48.8	51.1
Unemployment rate (%)	14.6	14.6	14.5	19.5	20.3	18.6
	Population 25 years and over:					
	Grey County			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	59.9	64.1	56.0	65.7	70.8	61.0
Employment rate (%)	57.2	61.1	53.5	60.9	66.0	56.1
Unemployment rate (%)	4.6	4.7	4.5	7.4	6.8	8.0

Source: Manifold SuperDemographics, 2022.

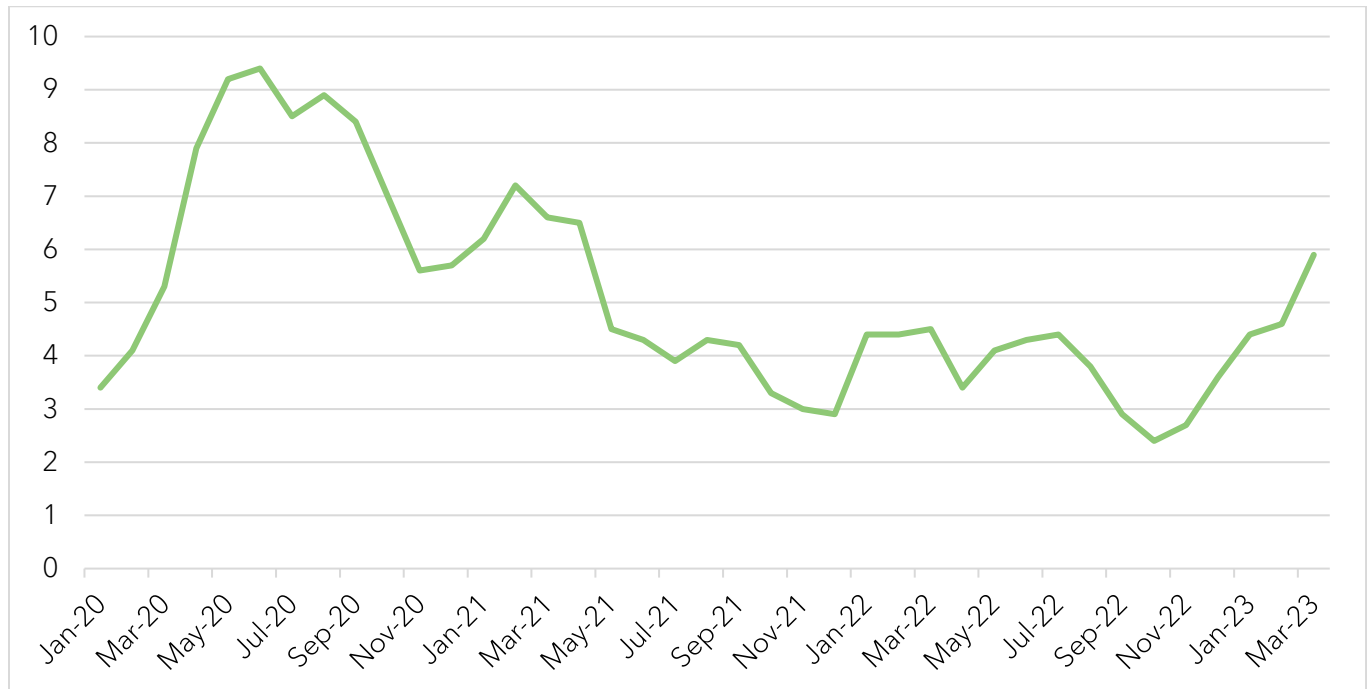


2.1.1. Moving Engagement Rates

The above figures represent 2022 engagement rates and are heavily impacted by the pandemic. As such, the figures are greatly impacted by the unique circumstances brought on by COVID-19. To present a more complete picture of economic engagement in Grey County, moving averages for the Stratford-Bruce Peninsula are presented below.

First, while unemployment rates rose drastically at the beginning of the pandemic (approaching 10%), they quickly fell back to pre-pandemic levels, maintaining their status well below the provincial mark. A low unemployment rate, often below 5%, typically suggests that employers may struggle to find new staff.

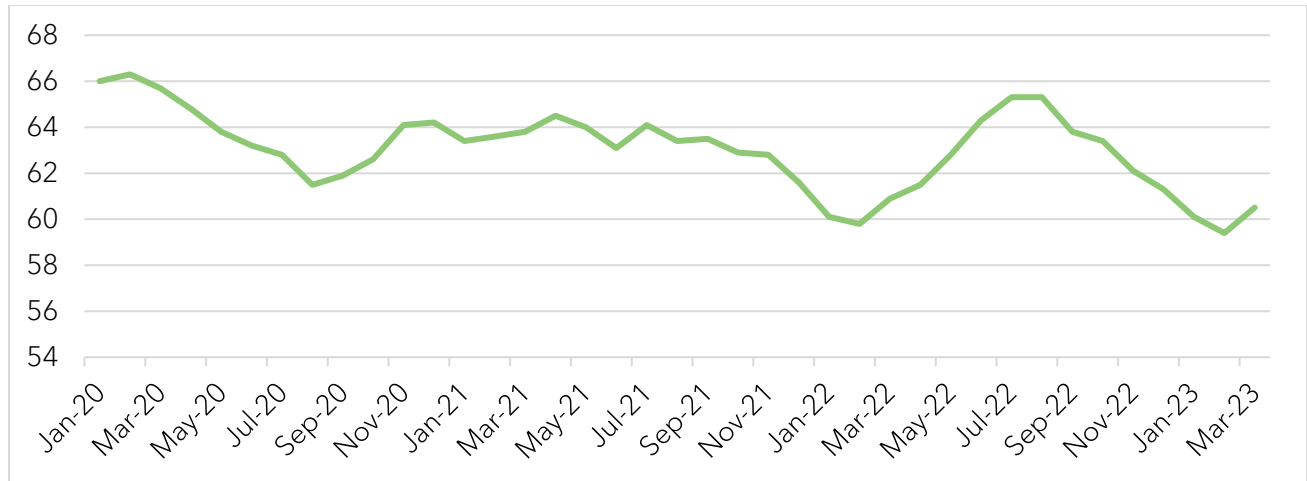
Figure 8: Unemployment Rate, Stratford-Bruce Peninsula, 2020-2023



Source: Statistics Canada.

The Participation rate was similarly volatile, with a steep drop through the beginning of the pandemic followed by a resurgence as the COVID-19 impact waned. The end of 2022 saw a significant drop in the participation rate, though it appears as though it may be rising again in early 2023.

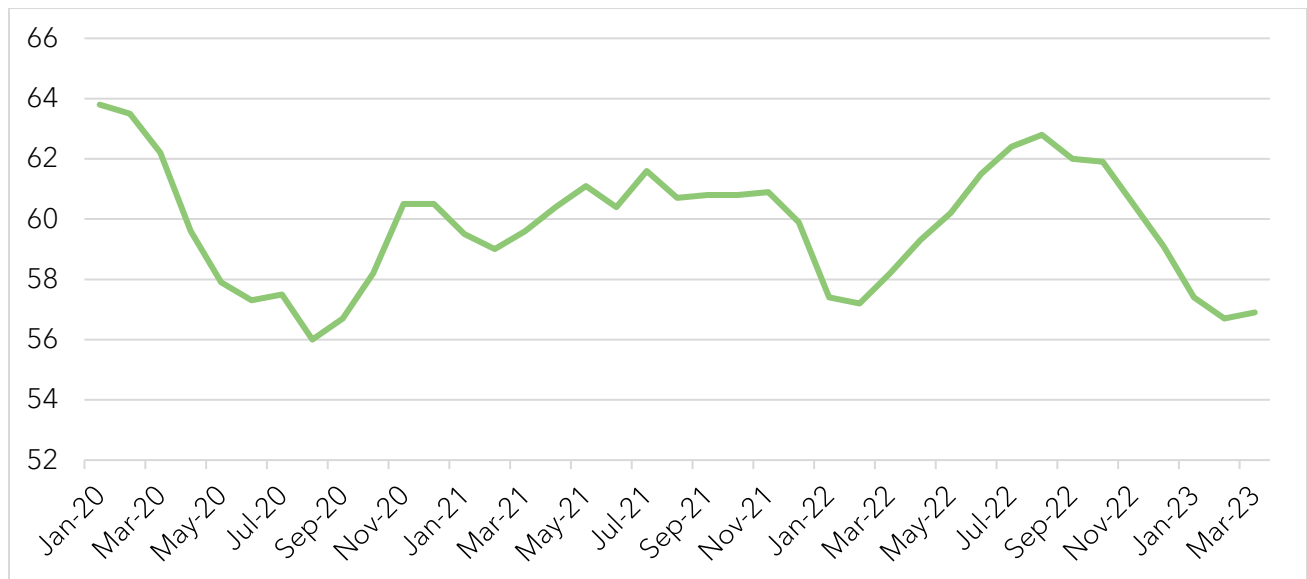
Figure 9: Participation Rate, Stratford-Bruce Peninsula, 2020-2023



Source: Statistics Canada.

Finally, the employment rate across Stratford-Bruce Peninsula faced similar peaks and valleys as the participation rate. While the unemployment rate began near 64%, by the summer of 2020 it had fallen to 56%.

Figure 10: Employment Rate, Stratford-Bruce Peninsula, 2020-2023



Source: Statistics Canada.

Each of these three moving averages shows that the pandemic has not had a consistent impact on the local economy over the past three years. Instead, there have been ebbs and flows to the overall impact on economic engagement, however, throughout the pandemic the local labour force has found unemployment levels staying below the provincial figure.

THE BOTTOM LINE

PARTICIPATION RATE*

ONTARIO
65.1%

61.0%

EMPLOYMENT RATE*

ONTARIO
59.2%

57.4%

UNEMPLOYMENT RATE*

ONTARIO
9.1%

5.9%

*Engagement rates are from 2022 and should be used with caution due to the influence of the pandemic.

Grey County's participation rates are **slightly lower** than their **provincial counterparts** (61.1% in Grey County and 65.2% in Ontario).

However, Grey County's **unemployment rate is considerably lower**, especially when non-COVID-19 figures are taken into consideration.

This is likely explained by Grey County's higher average and median ages. That is, it is likely that a much larger percentage of Grey County's residents are retired and therefore not engaged in the labour force. *N.B. There are other possible explanations, this is just a likelihood given the age distribution of the population.*



2.2. Labour Supply in Grey County

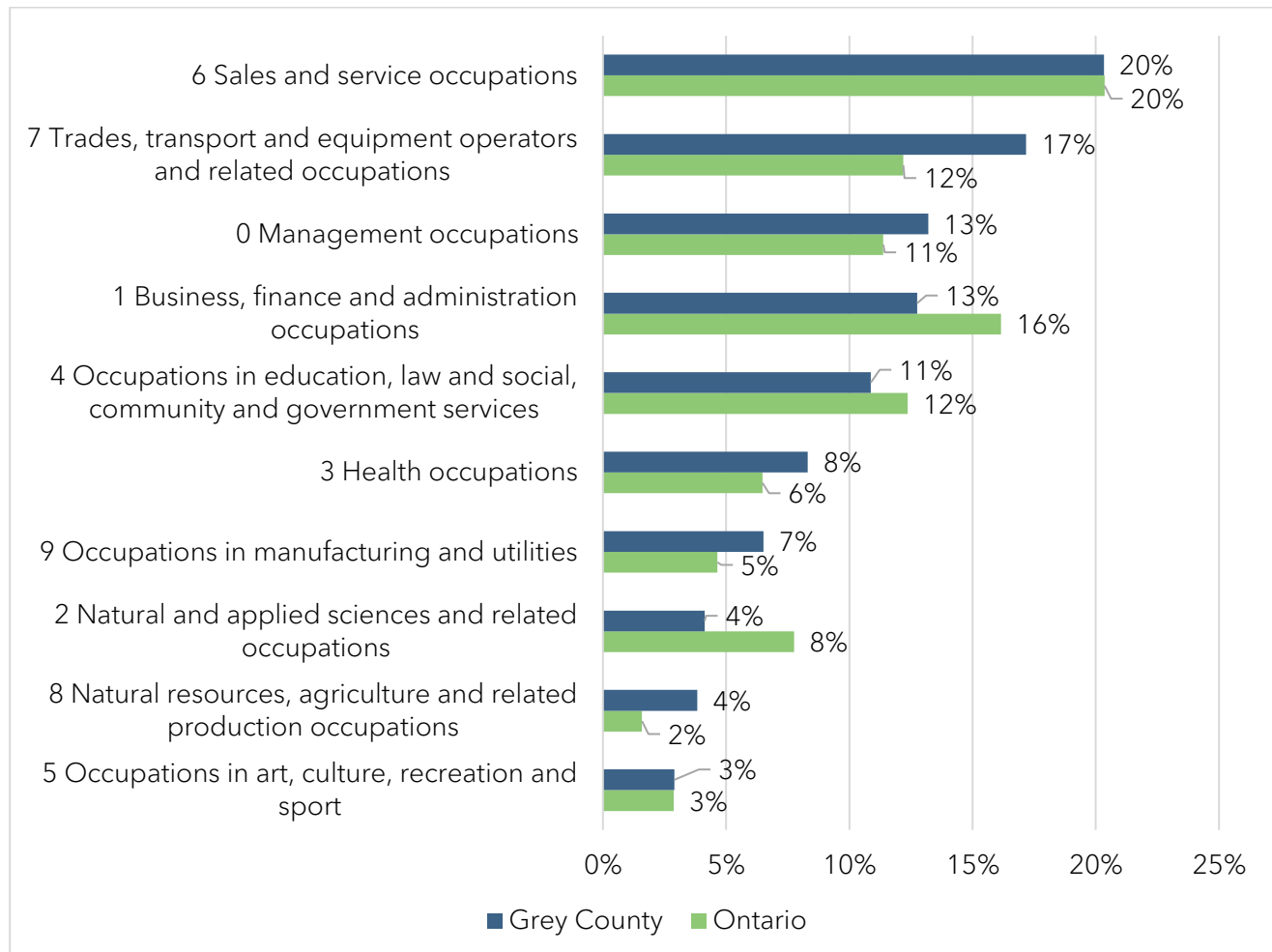
Persons in the labour force can be classified using the National Occupational Classification (NOCs) codes; a four-tiered hierarchical arrangement of occupational groups with successive levels of disaggregation. It contains broad occupational categories (1-digit), major (2-digit code), minor (3-digit code) and unit groups (4-digit code).



Figure 11 shows that Grey County residents most commonly work in:

- Sales and service occupations
- Trades, transport and equipment operators and related occupations
- Management occupations
- Business, finance and administration occupations

Figure 11: Resident Labour Force by Occupation, 1-digit NOCs, 2022



Source: Manifold SuperDemographics 2022.

The number of part-time and full-time workers also helps identify potential labour force engagement and supply. In Grey County, 51.6% of employed individuals typically worked full-time while 48.4% worked part-time. This is comparable to all of Ontario where 52.5% of individuals typically worked full-time and 47.4% worked part-time.

Table 6: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2022

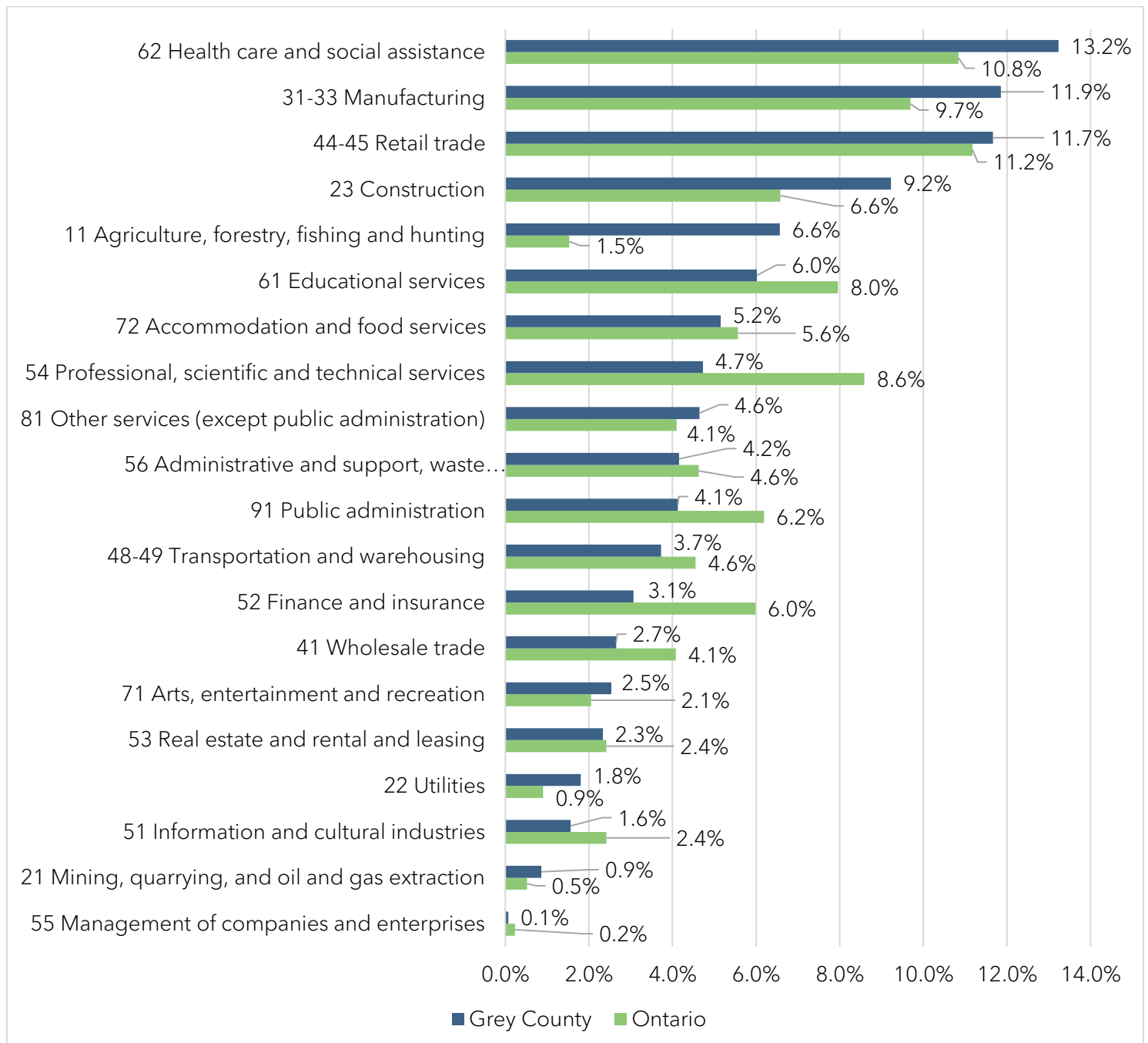
Status	Grey County	Grey County %	Ontario %
Full-Time	29,982	51.6%	52.5%
Part-Time	28,098	48.4%	47.5%

Source: Manifold SuperDemographics 2022.



The following figure illustrates the supply of labour that Grey County residents provide for specific sectors. Grey County has larger labour concentrations relative to Ontario in several sectors, but most prominently in agriculture, forestry, fishing and hunting (6.6% of residents are employed within this sector locally, compared to only 1.5% across the province). Concentrations are explored in-depth in section 3.4.

Figure 12: Labour Force by Industry, 2022



Source: Manifold SuperDemographics 2022.

2.3. Workforce Commuting Flow

This subsection aims to identify the most probable labour force recruitment area for Grey County using commuting patterns. Tables 9 and 10 show commuting flows for persons reporting a **“usual place of work”** or **“place of residence”** in Grey County, for all those geographies where greater than 1% of total residents commute to/from.

Commuter flow for Grey County’s member municipalities can be found in the **Appendix**. Table 7 reveals the following trends regarding labour force commuting:

- The top three areas that Grey County supplies labour to are Wellington North, Collingwood, and Brockton.
- Grey County exports approximately 28% of its resident labour with a usual place of work.

Table 7: Top Places to Work for Grey County Residents, 2021⁶

Place of Work	Total	Male	Female
Grey County	19,910	9,110	10,770
Wellington North	870	505	370
Collingwood	860	415	450
Brockton	650	355	295
Kincardine	610	535	80
South Bruce Peninsula	445	200	245
Arran-Elderslie	440	210	225
Toronto	370	265	85
New Tecumseth	340	250	80
Shelburne	280	115	150
Total residents with a usual place of work	27,540	13,495	13,685
# of residents working outside of Grey County	7,630	4,385	2,915
% of residents working outside of Grey County	28%	32%	21%

Source: Statistics Canada, Commuting Flows Tables 2021.

⁶ Subtotals (male and female) may not add to the total due to rounding methods used by Statistics Canada.

Total residents with a usual place of work include those geographies not shown on the Table.

Regarding recruitment into Grey County, the following trends are revealed:

- Top recruitment areas for Grey County are Brockton, South Bruce Peninsula, and Collingwood
- Of those people with a usual place of work in Grey County, 19% live outside the County.

Table 8: Top Labour Recruitment Areas for Grey County, 2021

Place of Residence	Total	Male	Female
Grey County	19,910	9,110	10,770
Brockton	795	365	415
South Bruce Peninsula	765	410	340
Collingwood	745	395	355
Arran-Elderslie	480	160	310
Saugeen Shores	300	100	195
South Bruce	270	95	160
Individuals With a Place of Work in Grey County	24,555	11,230	13,055
# of people working inside Grey County who live outside of Grey County	4,645	2,120	2,285
% of people working inside Grey County who live outside of Grey County	19%	19%	18%

Source: Statistics Canada, Commuting Flows Tables 2021.



2.4. Labour Recruiting Area: Emerging and in-Demand Occupations

This subsection outlines trends about the occupations employed within Grey County's labour recruiting area, regardless of where workers live. The objective is to understand which occupations are concentrated, growing, and emerging, and could possibly be leveraged to drive local growth. For the purposes of this report, Grey County's possible recruiting area consists of Brockton, South Bruce Peninsula, Collingwood, Arran-Elderslie, Saugeen Shores, and South Bruce, as these areas attract the most consistent flow of workers.

Examining occupation by location will help discern whether there is a concentration of talent/skills and that, in turn, will help identify the industries that are potentially likely to flourish as a result of those skills being available. The occupations are analyzed at the four-digit National Occupation Classification⁷; the most disaggregated level. The following tables and charts illustrate the following:

- Occupations with a large number of jobs in 2022
- Occupations with a large percentage of job growth between 2017-2022
- Occupations with a large projected job growth between 2022-2027
- Occupations that are concentrated in labour shed relative to the rest of Canada.

The objective is to understand which occupations are concentrated, growing and emerging in the labour recruiting area.

⁷ National Occupation Classification: <https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/express-entry/eligibility/find-national-occupation-code.html>

Table 9: Occupations with Highest Level of Employment in the Labour Recruitment Area

Description	2017 Jobs	2022 Jobs	2017- 2022 Change	2017- 2022 % Change	2021 ⁸ Median Wages
Retail salespersons	2,440	2,462	21	1%	\$32,364
Food counter attendants, kitchen helpers and related support occupations	2,328	2,315	-13	-1%	\$29,141
Nurse aides, orderlies and patient service associates	1,541	1,644	103	7%	\$44,855
Cashiers	1,642	1,535	-107	-7%	\$29,065
Registered nurses and registered psychiatric nurses	1,524	1,370	-154	-10%	\$76,325
Transport truck drivers	981	1,211	231	24%	\$51,863
Store shelf stockers, clerks and order fillers	897	1,177	281	31%	\$30,224
Retail sales supervisors	866	1,070	204	24%	\$41,470
Elementary school and kindergarten teachers	952	967	14	2%	\$77,402
Janitors, caretakers and building superintendents	1,036	926	-110	-11%	\$42,341
Light duty cleaners	955	878	-77	-8%	\$36,494
Cooks	855	859	5	1%	\$29,551
Construction trades helpers and labourers	699	803	104	15%	\$44,543
Food and beverage servers	778	793	15	2%	\$30,573
Administrative officers	784	753	-31	-4%	\$53,129
General farm workers	707	753	46	6%	\$34,717
Receptionists	617	751	135	22%	\$35,362
Sales and account representatives - wholesale trade (non-technical)	489	661	172	35%	\$54,835
Secondary and elementary school teachers and educational counsellors	454	660	206	45%	\$76,728
Carpenters	548	635	87	16%	\$56,344
Administrative assistants	250	616	365	146%	\$48,473

Source: EMSI Analyst 2022.3.

⁸ Once again, median wages are compiled for the previous year due to data accrual methods.

Figure 13 illustrates the 20 occupations that added the largest total number of jobs to the economy of the labour recruitment area between 2017 and 2022.

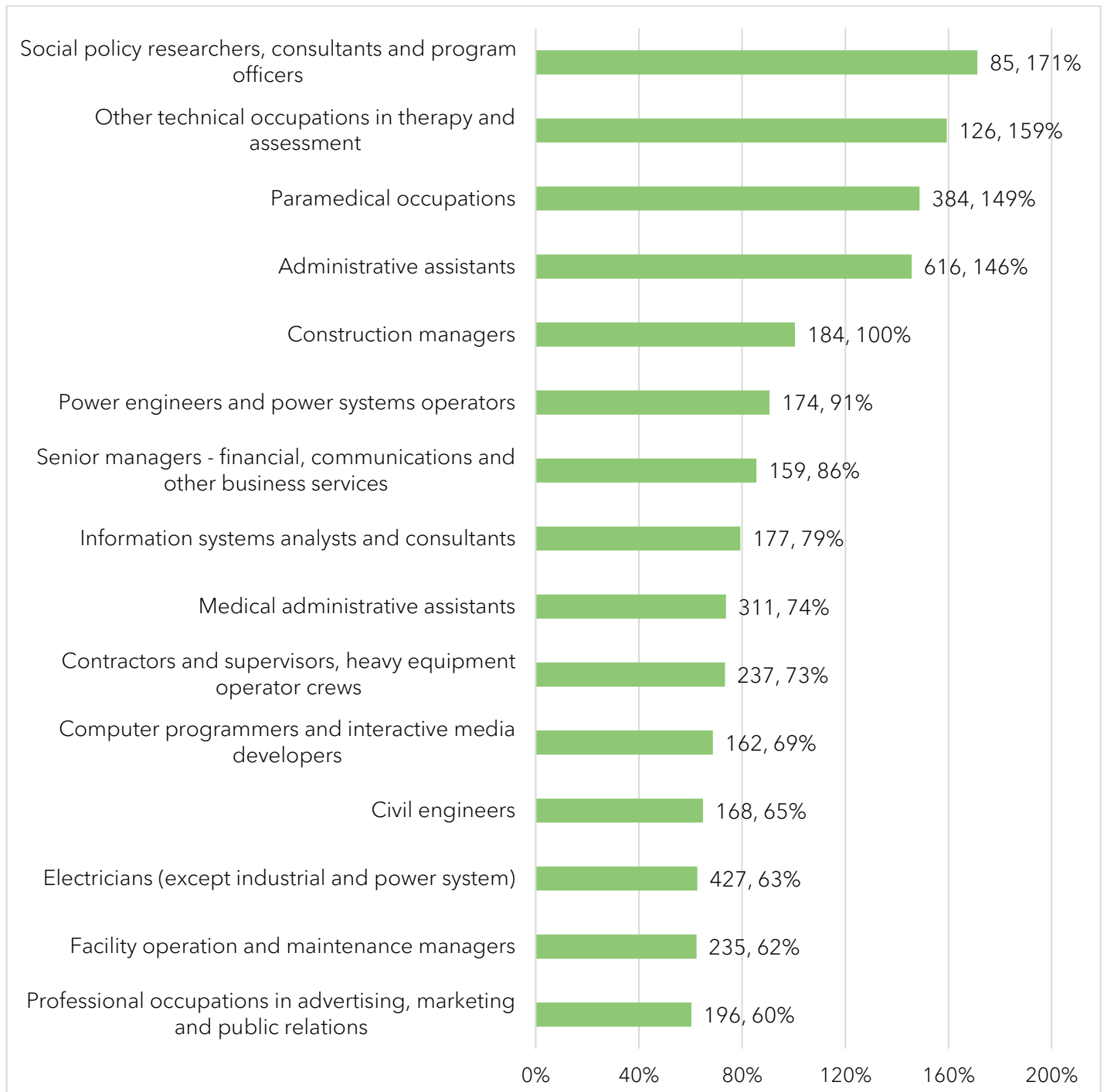
Figure 13: Largest Absolute Job Growth in the Labour Recruitment Area, 2017-2022



Source: EMSI Analyst 2022.3.

Figure 14 illustrates occupations that had the most intense growth in jobs, and also had a relevant impact on the economy as they added a minimum of 50 jobs to the labour recruitment area. Figure 14 presents 2022 job count figures and relative (%) job growth.

Figure 14: Largest (%) Growth Occupations in the Labour Recruiting Area, 2017-2022



Source: EMSI Analyst 2022.3.

Location Quotient is used to measure the relative concentration of an occupation; that is, it compares the percentage of jobs per occupation in the labour shed, relative to the total percentage of jobs in the same occupation across Canada. A location quotient above 2 means the labour recruiting area employs twice as many jobs in that occupation than is typical in the province or nation. Such a high concentration shows that there is some momentum in growing or attracting these jobs unique to the region.

Table 10 illustrates occupations that are most heavily concentrated in the labour recruitment area (while also employing over 50 individuals) relative to the rest of Canada—using location quotient. **Occupations are considered concentrated if they have a location quotient above 1.25.**

Table 10: Concentrated Occupations in the Labour Recruitment Area, 2022

Occupation	2022 Jobs in the local labour recruiting area	Location Quotient
Glass forming and finishing machine operators and glass cutters	71	6.31
Water and waste treatment plant operators	141	4.32
Cable television service and maintenance technicians	59	3.68
Binding and finishing machine operators	56	3.39
Paramedical occupations	384	3.39
Supervisors, printing and related occupations	52	3.27
Plateless printing equipment operators	71	3.17
Court reporters, medical transcriptionists and related occupations	65	3.09
Printing press operators	149	2.95
General farm workers	753	2.94
Other technical occupations in therapy and assessment	126	2.89
Concrete, clay and stone forming operators	59	2.82
Machining tool operators	87	2.65
Other trades and related occupations, n.e.c.	68	2.49
Process control and machine operators, food and beverage processing	493	2.47
Hotel front desk clerks	192	2.25
Labourers in mineral and metal processing	56	2.20
Other religious occupations	58	2.19
Facility operation and maintenance managers	235	2.19
Other products assemblers, finishers and inspectors	229	2.19

Source: EMSI Analyst 2022.3.

2.5. Key Occupations for Labour-Based Investment Attraction

Some key occupations stand out in the labour recruitment area, as they are growing, projected to grow and/or are concentrated. The following list represents occupations that have performed well in the labour recruitment area analysis and represent a strong possibility for labour-based investment attraction. Occupations related to publicly funded industries and retail-related occupations are not considered here.

The following are **key existing occupations**: they are large (300+ jobs), growing (by at least 20% of total jobs), concentrated (with a national LQ greater than 1.20), and pay well (2021 median wage of \$50,000 or higher):

1. Transport truck drivers
2. Heavy equipment operators
3. Licensed practical nurses
4. Electricians (except industrial and power systems)
5. Paramedical occupations

The following are **key emerging occupations**; those that are not yet concentrated (LQ less than 1.25) and had the largest percentage growth over the past 5 years (over 100% of total jobs), while at the same time being well-paying occupations wages (2021 median wage of \$50,000 or higher):

1. Construction managers
2. Database analysts and data administrators
3. Editors
4. Recreation, sports and fitness policy researchers, consultants and program officers
5. Securities agents, investment dealers and brokers
6. Social policy researchers, consultants and program officers
7. Software engineers and designers
8. Supervisors, motor transport and other ground transit operators

The above occupations form a group of what will be referred to as “**key occupations**”, which are widely employed and/or increasingly in demand within the County and pay well. They represent the best opportunity in terms of attracting industry to Grey County based on labour market patterns. In what follows, the industries that most commonly hire these key occupations are revealed using inverse staffing patterns.

Table 11 on the following page shows which industries in the labour recruitment area most commonly employ (by largest number of jobs) all of the identified key occupations. From the list of industries identified to most commonly hire the “key occupations” in the region, the following have seen the fastest growth (100% or above) in the labour recruitment area over the previous 5 years:

1. Facilities support services
2. Provincial and territorial public administration
3. Individual and family services
4. Computer systems design and related services
5. Offices of other health practitioners
6. Dairy product manufacturing



Table 11: Key Staffing Patterns, 2017-2022

Industry	Key Occupations Group Jobs in Industry (2017)	Key Occupations Group Jobs in Industry (2022)	% Change (2017- 2022)	% of Total Jobs in Industry (2022)
Building equipment contractors	204	317	56%	29.0%
General freight trucking	223	274	23%	71.4%
General medical and surgical hospitals	140	203	45%	8.5%
Local, municipal and regional public administration	98	194	98%	11.4%
Other specialty trade contractors	144	173	20%	32.5%
Non-metallic mineral mining and quarrying	70	128	83%	22.4%
Nursing care facilities	66	115	74%	8.9%
Other ambulatory health care services	60	115	92%	92.5%
Residential building construction	69	110	59%	11.0%
Highway, street and bridge construction	76	96	26%	35.2%
Farms	57	81	42%	6.0%
Specialized freight trucking	57	74	29%	70.1%
Defence services	33	61	86%	17.2%
Residential developmental handicap, mental health and substance abuse facilities	50	58	14%	8.1%
Non-residential building construction	35	58	67%	17.7%
Dairy product manufacturing	25	57	130%	6.1%
Community care facilities for the elderly	58	57	-2%	8.6%
Facilities support services	10	53	423%	6.6%
Utility system construction	42	52	24%	14.7%

Source: EMSI Analyst 2022.3.

3. ECONOMIC BASE ANALYSIS

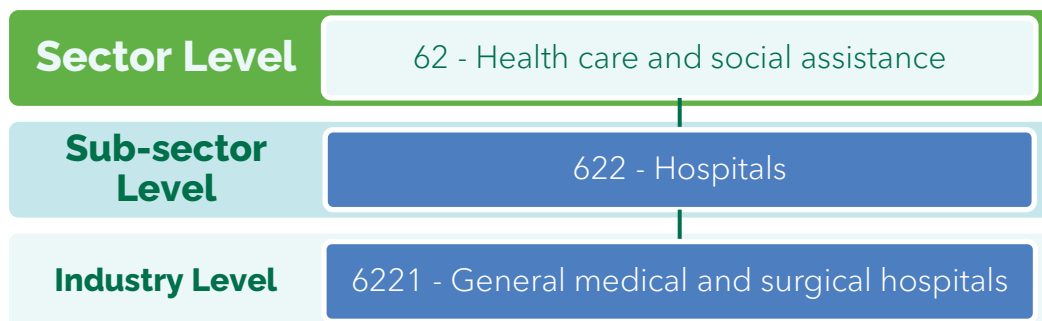
The list of industries in Table 13 (previous page) is an indication of industries that could be successful in Grey County given the labour force supply or could be further developed alongside supporting industries.



This section investigates the local economy pertinent to Grey County; that is, the jobs and businesses that drive the local economy. As such, the central focus of this section will be **Grey County, benchmarked by Ontario**.

This section reports industry statistics related to exports, employment, and business growth for the local economy with the aim of uncovering key industries that either exist or are emerging in the region today.

The “North American Industry Classification System” (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industry categories are called sectors, which are broken down into sub-sectors, which are then further broken down into Industries. An example of this breakdown follows:



3.1. Employment Profile

The primary employment sectors in Grey County are health care and social assistance; retail trade; and manufacturing. Between 2017 and 2022, the local economy receded by **618 jobs (-2%) to a total of 37,240 jobs**. Percentage job growth in Grey County lagged relative to the province, where job totals increased by 5% between 2017-2022. Table 12 indicates the percentage of job growth, by sector, for each of these economies. Note that negative numbers are indicated by red text.

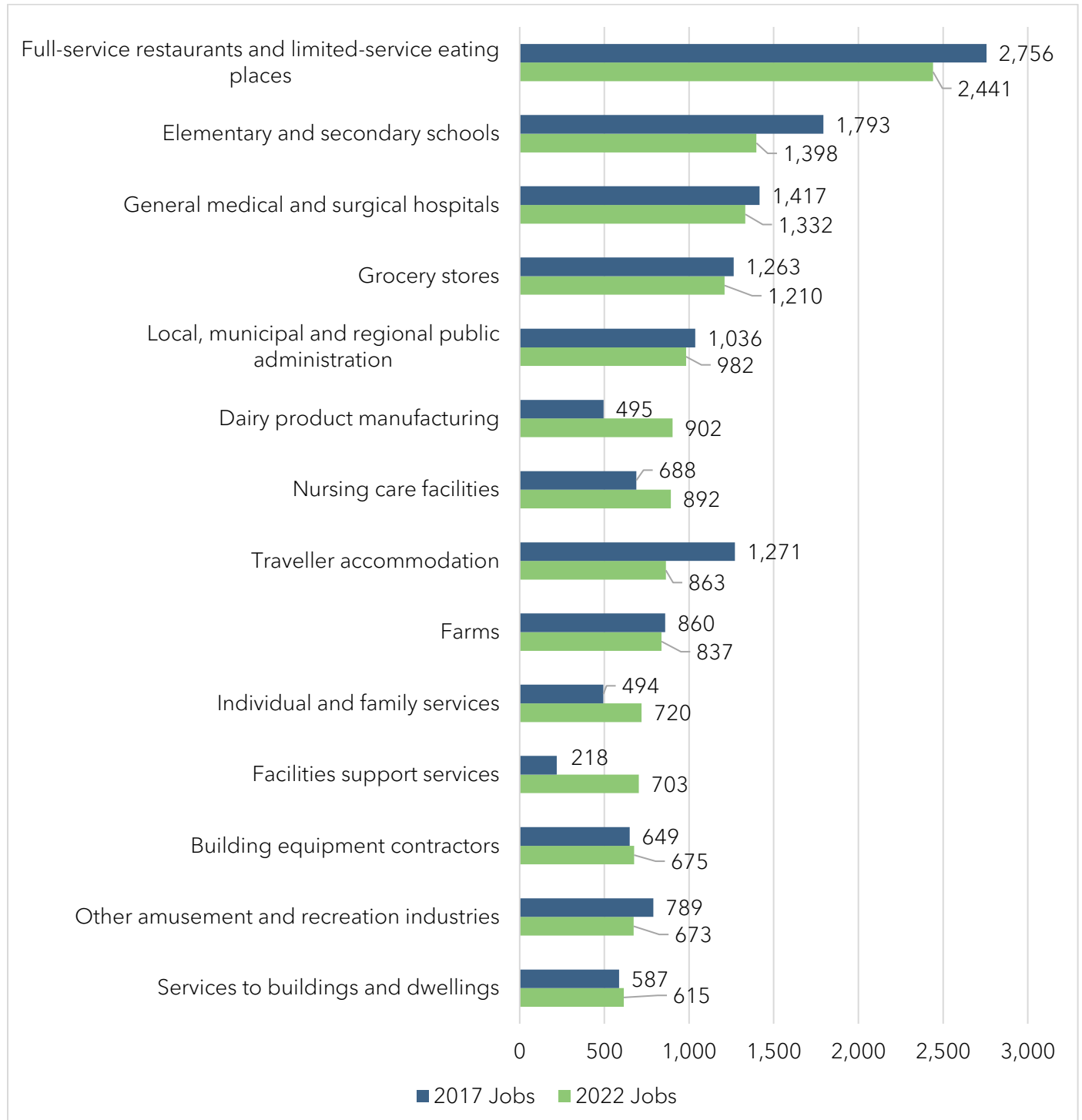
Table 12: Employment Growth by Sector, Grey County and Ontario, 2017-2022

NAICS	Description	2022 Jobs	2017-2022 Change	Grey County % Change	Ontario % Jobs Change
11	Agriculture, forestry, fishing and hunting	918	-25	-3%	-4%
21	Mining, quarrying, and oil and gas extraction	313	49	18%	8%
22	Utilities	195	20	11%	8%
23	Construction	2,825	150	6%	13%
31-33	Manufacturing	4,737	-120	-2%	0%
41	Wholesale trade	922	-192	-17%	4%
44-45	Retail trade	4,781	-52	-1%	0%
48-49	Transportation and warehousing	1,080	80	8%	11%
51	Information and cultural industries	330	-127	-28%	-2%
52	Finance and insurance	981	240	32%	11%
53	Real estate and rental and leasing	485	-80	-14%	-7%
54	Professional, scientific and technical services	1,208	124	11%	26%
55	Management of companies and enterprises	56	10	21%	30%
56	Administrative and support, waste management and remediation services	2,021	451	29%	5%
61	Educational services	1,851	-329	-15%	7%
62	Health care and social assistance	6,237	-11	0%	10%
71	Arts, entertainment and recreation	794	-147	-16%	-12%
72	Accommodation and food services	3,479	-782	-18%	-11%
81	Other services (except public administration)	1,444	105	8%	-4%
91	Public administration	1,898	87	5%	8%
X0	Unclassified	685	-69	-9%	-4%
All	Total	37,240	-618	-2%	5%

Source: EMSI Analyst 2022.3.

To better understand how each sector supports jobs, Figure 15 shows job count data for **industries with at least 10 employed or self-employed positions in Grey County** by number of jobs in 2022. Jobs in 2017 are also shown to illustrate employment change.

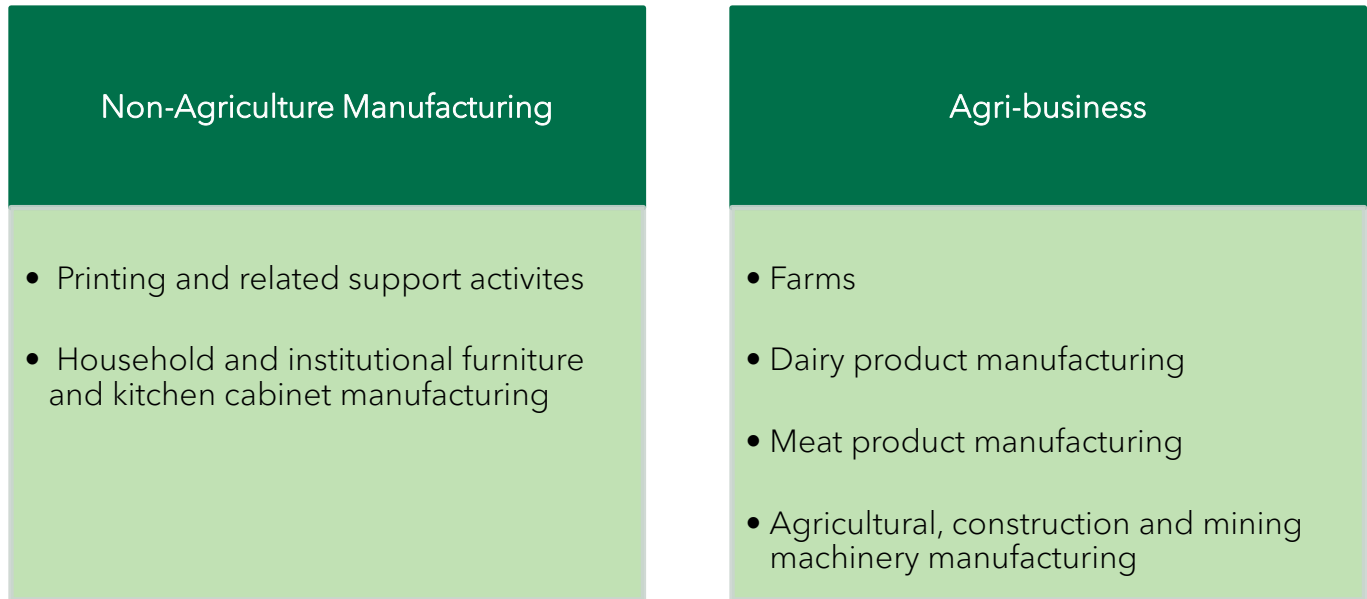
Figure 15: Largest Industries by Number of Jobs, 2017 and 2022



Source: EMSI Analyst 2022.3.

Figure 16 illustrates potential areas for investment attraction as they are having a significant economic impact in terms of job creation—publicly funded industries (i.e., education and healthcare), retail trade, as well as those related to residential construction are excluded as they are not pertinent to investment attraction since they are dependent on population growth.

Figure 16: Growth Sectors and Industries, 2017 -2022



Source: EMSI Analyst 2022.3.



3.2. Economic Output

This subsection highlights industries with the largest economic impact. The following table illustrates industries with the highest level of economic output as measured by total sales. As can be seen, manufacturing towers above other industries in terms of total sales figures (\$2.75 B in 2020). Five industries in Grey County had over \$500 million in sales in 2020:

- Manufacturing;
- Construction;
- Health care and social assistance
- Agriculture, forestry, fishing and hunting; and
- Public administration.

Table 13: Economic Output by Industry, 2020

Industry	Sales	Average Wages
Manufacturing	\$2,751,566,060	\$47,717
Construction	\$772,501,440	\$51,572
Health care and social assistance	\$670,801,835	\$48,111
Agriculture, forestry, fishing and hunting	\$547,248,861	\$27,503
Public administration	\$528,112,096	\$63,075
Administrative and support, waste management and remediation services	\$417,008,103	\$45,097
Retail trade	\$338,113,772	\$27,377
Accommodation and food services	\$254,867,391	\$22,328
Finance and insurance	\$237,525,747	\$51,367
Educational services	\$222,474,698	\$60,492
Real estate and rental and leasing	\$214,382,929	\$31,868
Professional, scientific and technical services	\$199,445,813	\$52,602
Wholesale trade	\$152,245,364	\$47,673
Other services (except public administration)	\$147,459,321	\$35,425
Transportation and warehousing	\$146,254,780	\$40,557
Information and cultural industries	\$76,216,463	\$42,804
Mining, quarrying, and oil and gas extraction	\$75,639,529	\$45,213
Utilities	\$64,744,001	\$83,007
Arts, entertainment and recreation	\$59,838,256	\$28,598
Management of companies and enterprises	\$4,921,714	\$57,669
All industries	\$7,881,368,173	\$43,399

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

3.3. Export Sales

This subsection investigates export sales by industry. Exports show the amount of money that is spent by industries located outside the region (domestically and internationally) in exchange for goods or services produced by businesses located in Grey County. **In 2020, the most recent data available, total export sales amounted to \$4,751,564,325.** Below are the largest drivers of external revenues into Grey County, once again led by Manufacturing.

Table 14: Top Export Dollars Flowing into Grey County by industry, 2020

Industry	Total Export Sales
Manufacturing	\$1,985,804,781
Public administration	\$479,035,902
Health care and social assistance	\$478,348,916
Administrative and support, waste management and remediation services	\$312,887,622
Agriculture, forestry, fishing and hunting	\$291,796,364
Construction	\$192,248,870
Educational services	\$179,544,202
Retail trade	\$110,585,201
Accommodation and food services	\$108,547,957
Finance and insurance	\$95,968,450
Professional, scientific and technical services	\$90,650,998
Transportation and warehousing	\$75,821,637
Wholesale trade	\$69,784,391
Real estate and rental and leasing	\$65,261,752
Mining, quarrying, and oil and gas extraction	\$62,238,488
Other services (except public administration)	\$57,230,373
Information and cultural industries	\$34,312,764
Arts, entertainment and recreation	\$30,322,966
Utilities	\$29,058,527
Management of companies and enterprises	\$2,114,164
Total Exports	\$4,751,564,325

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

3.4. Industry Supply Chain Analysis

An economic base analysis analyzes how the local economy functions. It does not provide solutions to economic problems but instead provides useful information required for decision-making about economic strategies. Table 15 presents the top 15 industries in terms of total goods purchased-from, as well as the percentage of those purchases made in-region and out-of-region.

Table 15: Top Industries by Purchasing Power, Grey County, 2020

Industry	Total Purchases from Sector	Percentage Purchased in Region	Percentage Purchased Out of Region
Farms	\$440,699,865	42.9%	57.1%
Motor vehicle parts manufacturing ⁹	\$80,534,516	99.4%	0.6%
Depository credit intermediation	\$76,478,897	26.7%	73.3%
Lessors of real estate	\$71,621,000	46.9%	53.1%
Architectural, engineering and related services	\$62,481,457	23.0%	77.0%
Plastic product manufacturing	\$61,790,787	12.1%	87.9%
Electric power generation, transmission and distribution	\$55,078,612	20.2%	79.8%
Petroleum and coal product manufacturing	\$48,747,325	0.0%	100.0%
Dairy product manufacturing	\$44,801,041	99.9%	0.1%
Pesticide, fertilizer and other agricultural chemical manufacturing	\$43,953,825	97.5%	2.5%
General freight trucking	\$43,040,613	46.4%	53.6%
General medical and surgical hospitals	\$42,678,696	84.1%	15.9%
Insurance carriers	\$40,536,735	26.4%	73.6%
Pharmaceutical and medicine manufacturing	\$37,410,406	0.0%	100.0%
Architectural and structural metals manufacturing	\$36,061,109	47.0%	53.0%

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

⁹ Discussions with County Staff suggest that this sector is overrepresented within the data, as the larger motor vehicle parts manufacturing businesses have closed since 2020. Data limitations mean the most recently available information is from 2020 and is therefore presented here, with the understanding that sector impacts may have shifted since then.

3.5. Location Quotient Analysis

Location quotient (LQ) analysis compares the level of employment concentration (or specialization) in a local economy (i.e., Grey County) to the level of employment concentration in one or more benchmark areas. In other words, does the local economy have proportionately more or fewer employees in specific industries than the benchmark area?

3.5.1. Location Quotient Analysis by Sector

LQ helps to identify the strengths of the community. The location quotient at the broadest industry classification level indicates that Grey County has the strongest specializations relative to the rest of the province and nation in the following sectors:

- Agriculture, forestry, fishing and hunting
- Mining, quarrying, and oil and gas extraction
- Accommodation and food services

Table 16: Location Quotient Analysis by Sector

Description	2022 Provincial Location Quotient	2022 National Location Quotient
Agriculture, forestry, fishing and hunting	3.50	2.17
Mining, quarrying, and oil and gas extraction	2.00	0.73
Accommodation and food services	1.46	1.38
Health care and social assistance	1.46	1.34
Arts, entertainment and recreation	1.43	1.39
Construction	1.33	1.20
Manufacturing	1.29	1.45
Retail trade	1.20	1.13
Other services (except public administration)	1.13	1.08
Unclassified	1.01	0.99
Administrative and support, waste management and remediation services	0.98	1.16
Real estate and rental and leasing	0.79	0.83
Public administration	0.72	0.69
Utilities	0.70	0.72
Transportation and warehousing	0.67	0.65
Educational services	0.65	0.63
Finance and insurance	0.48	0.59
Wholesale trade	0.47	0.54
Professional, scientific and technical services	0.45	0.51
Information and cultural industries	0.37	0.42
Management of companies and enterprises	0.22	0.22

Source: EMSI Analyst 2022.3.

3.5.2. Location Quotient Analysis by Industry

The following tables list the industries that are concentrated in Grey County's local economy.

Table 17: Concentrated Industries, Relative to the Rest of Canada, 2022

Description	2022 Jobs	2022 National Location Quotient
Other leather and allied product manufacturing	65	43.91
Facilities support services	703	28.24
Dairy product manufacturing	902	15.50
Grain and oilseed milling	155	8.97
Household appliance manufacturing	51	8.16
Other transit and ground passenger transportation	82	7.22
Psychiatric and substance abuse hospitals	346	5.77
Pesticide, fertilizer and other agricultural chemical manufacturing	89	5.67
Printing and related support activities	487	5.42

Source: EMSI Analyst 2022.3.

Table 18: Concentrated Industries, Relative to the Rest of Ontario, 2022

Description	2022 Jobs	2022 Provincial Location Quotient
Other leather and allied product manufacturing	65	30.83
Dairy product manufacturing	902	15.60
Facilities support services	703	15.25
Deep sea, coastal and Great Lakes water transportation	78	9.10
Pesticide, fertilizer and other agricultural chemical manufacturing	89	8.62
Grain and oilseed milling	155	8.61
Ship and boat building	44	8.56
Non-metallic mineral mining and quarrying	268	7.91
Psychiatric and substance abuse hospitals	346	6.57
Agricultural, construction and mining machinery manufacturing	252	5.06

Source: EMSI Analyst 2022.3.

3.6. Shift-Share Analysis

Shift-share analysis compares the local employment growth/decline of regional jobs by industry to the employment growth/decline of that industry, as well as the job growth overall for Canada. More specifically, this analytical tool examines job growth/decline by attributing growth, stability, or decline in industries over time to three forces:

- National economic growth: regional job growth/decline that is attributable to the growth, stability, or decline of the entire Canadian economy. Industries will be impacted positively or negatively by the state of the Canadian economy and consumer spending at a national level, external to any local factors.
- Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that particular economic activity in the Canadian economy (with the economic growth component removed). General industry trends are outside the influence of local actors and are therefore removed from the local impact.
- Local economic growth: local job growth/decline that is attributable to the local economy because it is growing/declining more or less quickly than jobs in the larger economy (with the Canadian economic and industry growth components removed).

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method. It has been applied to NAICS Industries using place of work statistics. Shift-share analysis allows the examination of changes through time (trends) versus the static snapshot of location quotients.

3.6.1. Shift-Share Analysis within Grey County

This subsection looks to the past (2012) and current figures (2022) to assess which sectors have been most positively impacted by local factors. The example below applies the model to the *other amusement and recreation industries* sector:

From 2012 to 2022 the *dairy product manufacturing* sector saw an increase of 428 jobs in Grey County.

- It would have been expected that the sector decreased by 4 positions based on large-scale industry factors that are relevant to the sector regardless of geographic location.
- National economic growth factors and their impact on the national sector would have been expected to lead to a net increase of 58 jobs over the same time period.
- As such, before accounting for local factors, the sector would have been expected to gain 54 jobs.

- Instead, the local sector is projected to grow by 428 jobs, suggesting that 373 new jobs can be applied to factors specific to Grey County.¹⁰

Table 19 allocates employment changes for the ten industries most positively impacted by local effects to national, industry and regional/local effects.

Table 19: Shift-Share Analysis: Competitive Industries, Grey County, 2012-2022

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Dairy product manufacturing	428	-4	58	373
Building equipment contractors	421	22	31	368
Residential building construction	249	40	44	165
Non-residential building construction	185	20	13	152
Services to buildings and dwellings	204	24	51	129
Individual and family services	278	106	54	118
Other schools and instruction	135	12	7	116
Meat product manufacturing	143	-1	34	110
Used merchandise stores	114	2	3	109
Non-metallic mineral mining and quarrying	129	5	17	107

Source: EMSI Analyst 2022.3.

Conversely, Table 20 presents the five industries most negatively impacted by regional/local effects from 2012-2022.

Table 20: Shift-Share Analysis: Declining Industries, Grey County, 2012-2022

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Motor vehicle parts manufacturing	-138	-16	76	-197
General medical and surgical hospitals	-75	-9	173	-240
Community care facilities for the elderly	-128	145	58	-331
Local, municipal and regional public administration	-268	-67	154	-355
Elementary and secondary schools	-394	38	221	-653

Source: EMSI Analyst 2022.3.

¹⁰ Subtotals may not add up to totals due to rounding methodologies.

3.7. Employer Structure

This subsection illustrates the number and size of employers by industry in the County. The data in this section comes from Statistics Canada's Canadian Business Patterns dataset. Employers in this dataset include businesses in the Business Register, which are all Canadian businesses that meet at least one of the three following criteria:



- Have an employee workforce for which they submit payroll remittances to Canada Revenue Agency; or
- Have a minimum of \$30,000 in annual revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

Statistics Canada divides businesses into two major groupings:

1. Businesses with a determinate number of employees; and
2. Businesses with an indeterminate number of employees.

Businesses without employees correspond to the "indeterminate" employment category from the previous reference periods. For economic development purposes, businesses with a determinate number of employees (one or more) are of greater interest than indeterminate businesses (which frequently are not active or have very low levels of economic activity). An increase in the number of indeterminate businesses can, however, signal potential new business startups.

According to the Canadian Business Registry, Grey County had 12,295 businesses as of June 2022, of which 3,738 (30.4%) had employees. Of these 3,738 businesses, the majority had between one and nine employees (2,951 or 78.9%). Comparatively, 131 businesses (3.5%) had over 50 employees.

Table 21: Business counts by size, Grey County, June 2022

	1 to 9 Employees	10 to 49 Employees	50+ Employees	Indeterminate	Total
Number of Businesses	2,951	656	131	8,557	12,295

Source: Canadian Business Patterns June 2022 from EMSI Analyst.

The largest sectors by total number of businesses with employees in Grey County are:

1. Construction
2. Retail trade
3. Health care and social assistance

Table 22 presents the five largest sub-sectors by business counts and includes businesses both with and without employees.

Table 22: Top 5 Sub-Sectors by Business Counts, Grey County, 2022

Sector	Businesses
Farms	1,730
Lessors of real estate	1,597
Residential building construction	376
Other financial investment activities	337
Building finishing contractors	299

Source: Canadian Business Patterns June 2022 from EMSI Analyst.

Many of these businesses, however, are self-employed individuals with no employees. Table 23 notes the subsectors in Grey County by businesses only with employees, excluding self-employed individuals.

Table 23: Top 5 Sub-Sectors by Businesses with Employees, Grey County, 2022

Sector	Businesses with employees
Farms	220
Full-service restaurants and limited-service eating places	160
Residential building construction	152
Offices of physicians	129
Building equipment contractors	112

Source: Canadian Business Patterns June 2022 from EMSI Analyst.



4. LOCAL ANALYSIS

As an addendum to the typical situational analysis, this section compares Grey County's economy to two similar, local jurisdictions, Simcoe County and Bruce County. This section profiles occupation and industry job totals within each County, as well as industry export and sales data and business counts. Given the size discrepancies within each County and differing geographies, comparisons are done on a percentage basis rather than raw totals, to compare more accurately.

4.1. Employment by Industry

Employment totals by industry show that Grey County has significantly higher levels of employment (on a relative basis) within health care and social assistance, while Bruce County relies heavily on the utilities sector. Simcoe County's total employment figure is considerably higher than either Grey or Bruce County, due to a substantially larger population.

Table 24: Employment Percentages by Industry, Grey, Bruce, and Simcoe Counties, 2022

Industry	Grey County	Bruce County	Simcoe County
Health care and social assistance	17%	8%	11%
Retail trade	13%	9%	12%
Manufacturing	13%	4%	9%
Accommodation and food services	9%	5%	7%
Construction	8%	9%	5%
Administrative and support, waste management and remediation services	5%	2%	5%
Public administration	5%	4%	7%
Educational services	5%	4%	6%
Other services (except public administration)	4%	2%	3%
Professional, scientific and technical services	3%	2%	3%
Transportation and warehousing	3%	2%	2%
Finance and insurance	3%	1%	2%
Wholesale trade	2%	2%	4%
Agriculture, forestry, fishing and hunting	2%	3%	1%
Arts, entertainment and recreation	2%	1%	2%
Real estate and rental and leasing	1%	1%	1%
Information and cultural industries	1%	1%	1%
Mining, quarrying, and oil and gas extraction	1%	1%	0%
Utilities	1%	19%	1%
Management of companies and enterprises	0%	0%	0%
Total Employment	37,240	26,968	185,846

Source: EMSI Analyst 2022.3.

4.2. Occupational Employment

Occupations of employment are relatively similar across the three Counties (though again, they differ greatly on overall counts due to differences in size). Bruce County is more heavily represented by natural and applied sciences and related occupations (9% in Bruce County compared to 6% across Simcoe County and 4% across Grey County), with a comparative reduction in sales and service occupations.

Across each of the three Counties, sales and service occupations as well as trades, transport and equipment operators and related occupations combine to represent more than 2-in-5 (40%+) of all occupations. Specifically, those occupations make up 45% of employment in Grey County, 43% in Bruce County, and 42% in Simcoe County.

Table 25: Employment Percentages by Occupation, Grey, Bruce, and Simcoe Counties, 2022

Industry	Grey County	Bruce County	Simcoe County
Sales and service occupations	27%	20%	27%
Trades, transport and equipment operators and related occupations	18%	23%	15%
Business, finance and administration occupations	13%	12%	15%
Health occupations	10%	7%	7%
Occupations in education, law and social, community and government services	10%	9%	11%
Occupations in manufacturing and utilities	8%	9%	7%
Management occupations	4%	4%	6%
Natural and applied sciences and related occupations	4%	9%	6%
Natural resources, agriculture and related production occupations	3%	3%	2%
Occupations in art, culture, recreation and sport	1%	1%	2%
Total Employment	37,240	26,968	185,846

Source: EMSI Analyst 2022.3.

4.3. Sales

Sales data across the three counties show clear differences between Grey and Simcoe, and Bruce County. Specifically, while over 50% (56.7%) of Bruce County's total sales figures are generated by the utilities sector (Bruce Power), neither Grey County nor Simcoe County sees even 1.5% of sales locally from the utilities sector.

While Grey County and Simcoe County have relatively similar breakdowns in sales by sector (though Simcoe's Manufacturing sector is 9.1% more concentrated than Grey's), the main difference is in the total size of the economies. Similarly, to the employment totals, Simcoe County's much larger population and geographical proximity to the GTA result in a significantly larger total sales figure sale – nearly 6 times as large (\$44.8 Billion in Simcoe County compared to \$7.9 Billion locally). Given the vast difference in overall size, comparisons are relatively moot.

Table 26: Percentage of Sales by Sector, Grey, Bruce, and Simcoe Counties, 2020

Industry	Percentage Sales by Sector		
	Grey County	Bruce County	Simcoe County
Manufacturing	34.9%	6.4%	44.0%
Public administration	9.8%	3.4%	10.1%
Health care and social assistance	8.5%	2.9%	5.6%
Administrative and support, waste management and remediation services	6.9%	0.9%	3.2%
Agriculture, forestry, fishing and hunting	6.7%	5.8%	2.0%
Construction	5.3%	8.7%	6.8%
Educational services	4.3%	1.8%	3.2%
Retail trade	3.2%	2.1%	4.3%
Accommodation and food services	3.0%	1.4%	2.0%
Finance and insurance	2.8%	1.0%	2.1%
Professional, scientific and technical services	2.7%	1.6%	2.7%
Transportation and warehousing	2.5%	1.2%	2.3%
Wholesale trade	1.9%	1.2%	3.4%
Real estate and rental and leasing	1.9%	1.4%	2.4%
Mining, quarrying, and oil and gas extraction	1.9%	0.8%	0.4%
Other services (except public administration)	1.0%	1.5%	1.7%
Information and cultural industries	1.0%	1.0%	1.5%
Arts, entertainment and recreation	0.8%	0.3%	0.8%
Utilities	0.8%	56.7%	1.4%
Management of companies and enterprises	0.1%	0.0%	0.1%
Total Sales	\$7.9 B	\$7.3 B	\$44.8 B

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

4.4. Exports

Export data present very similar percentage breakdowns as the sales data presented in Table 26. The importance of the utilities sector to Bruce County is even larger when analyzing exports (66.8%) while remaining low within both Grey County.

Grey County and Simcoe County see growth in the weight of the local manufacturing sector, while the difference in agriculture, forestry, fishing and hunting is larger as well (6.1% in Grey County, compared to 1.7% in Simcoe.). Once again, however, though the general trends are somewhat similar, the difference in overall size renders further comparison fruitless.

Table 27: Percentage of Exports by Sector, Grey, Bruce, and Simcoe Counties, 2020

Industry	Percentage Exports by Sector		
	Grey County	Bruce County	Simcoe County
Manufacturing	41.8%	5.2%	53.9%
Public administration	10.1%	4.1%	15.2%
Health care and social assistance	10.1%	2.6%	5.9%
Administrative and support, waste management and remediation services	6.6%	0.5%	2.6%
Agriculture, forestry, fishing and hunting	6.1%	5.2%	1.7%
Construction	4.0%	4.6%	2.2%
Educational services	3.8%	1.9%	4.2%
Retail trade	2.3%	0.9%	2.0%
Accommodation and food services	2.3%	1.1%	0.8%
Finance and insurance	2.0%	0.7%	1.2%
Professional, scientific and technical services	1.9%	1.1%	1.7%
Transportation and warehousing	1.6%	1.0%	1.6%
Wholesale trade	1.5%	1.0%	2.6%
Real estate and rental and leasing	1.4%	0.6%	0.9%
Mining, quarrying, and oil and gas extraction	1.3%	0.9%	0.5%
Other services (except public administration)	1.2%	0.8%	0.7%
Information and cultural industries	0.7%	0.9%	0.9%
Arts, entertainment and recreation	0.6%	0.1%	0.5%
Utilities	0.6%	66.8%	0.8%
Management of companies and enterprises	0.0%	0.0%	0.0%
Total Exports	\$4.8 B	\$5.5 B	\$27.3 B

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

4.5. Business Counts

The three Counties have very similar breakdowns by business size, with each having over 93% of local businesses employing either no employees (indeterminate) or 1 to 9 employees, highlighting again the importance of small business to local economies.

Table 28: Percentage of Businesses by Size, Grey, Bruce, and Simcoe Counties, 2022

	Grey County	Bruce County	Simcoe County
1 to 9 Employees	24.0%	22.0%	23.4%
10 to 49 Employees	5.3%	5.4%	5.8%
50+ Employees	1.1%	0.7%	1.1%
Indeterminate	69.6%	71.8%	69.6%
Total	12,295	9,008	52,398

Source: Canadian Business Patterns June 2022 from EMSI Analyst.



When breaking businesses down by sector, Simcoe County again sees a significant size advantage. The overall breakdown of the economies become clear, as well, when assessing the agriculture, forestry, fishing and hunting sector. Specifically, in Grey County (15%) and Bruce County (22%), agriculture, forestry, fishing and hunting represent more than 1-in-7 businesses, while in Simcoe County (3%), those businesses are only approximately 1-in-33 businesses.

Though “real estate and rental and leasing” represents between 16% and 20% of businesses in each of the three Counties, this is due in large part to the proliferation of individuals renting out a property as a secondary source of income and do not represent businesses in the traditional sense.

Table 29: Percentage of Businesses by Sector, Grey, Bruce, and Simcoe Counties, 2022

Industry	Percentage of Businesses by Sector		
	Grey County	Bruce County	Simcoe County
Real estate and rental and leasing	16%	16%	20%
Agriculture, forestry, fishing and hunting	15%	22%	3%
Construction	11%	9%	14%
Professional, scientific and technical services	8%	9%	9%
Other services (except public administration)	6%	6%	6%
Retail trade	6%	6%	7%
Health care and social assistance	6%	4%	6%
Finance and insurance	4%	3%	4%
Manufacturing	4%	2%	2%
Administrative and support, waste management and remediation services	3%	2%	4%
Transportation and warehousing	3%	2%	5%
Accommodation and food services	3%	3%	3%
Wholesale trade	2%	2%	2%
Arts, entertainment and recreation	1%	1%	1%
Information and cultural industries	1%	1%	1%
Educational services	1%	1%	1%
Management of companies and enterprises	1%	0%	1%
Utilities	0%	1%	0%
Public administration	0%	0%	0%
Mining, quarrying, and oil and gas extraction	0%	0%	0%
Total Businesses	12,295	9,008	52,398

Source: Canadian Business Patterns June 2022 from EMSI Analyst.

APPENDIX: COMMUTING FLOW WITHIN THE COUNTY

The tables below present commuting flow patterns within each of Grey County's member municipalities. Please note, many of the subtotals (male + female) do not sum to the total columns, due to rounding methods, as all figures are rounded to the nearest "5".

Blue Mountains

Top Places to Work for Blue Mountains Residents, 2021

Place of Work	Total	Male	Female
The Blue Mountains	950	450	495
Collingwood	360	185	175
Toronto	100	65	30
Meaford	65	10	50
Mississauga	40	25	15
Owen Sound	40	25	20
Total residents with a usual place of work	1,755	825	870
# of residents working outside of Blue Mountains	805	375	375
% of residents working outside of Blue Mountains	46%	45%	43%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Blue Mountains, 2021

Place of Residence	Total	Male	Female
The Blue Mountains	950	450	495
Collingwood	615	325	290
Meaford	400	225	175
Grey Highlands	160	95	65
Wasaga Beach	105	60	45
Clearview	90	40	55
Toronto	60	35	30
Chatsworth	40	30	10
Owen Sound	40	30	10
Individuals With a Place of Work in Blue Mountains	2,590	1,355	1,200
# of people working inside Blue Mountains who live outside of Blue Mountains	1,640	905	705
% of people working inside Blue Mountains who live outside of Blue Mountains	63%	67%	59%

Source: Statistics Canada, Commuting Flows Tables 2021.

Chatsworth

Top Places to Work for Chatsworth Residents, 2021

Place of Work	Total	Male	Female
Owen Sound	550	225	330
Chatsworth	315	165	145
Grey Highlands	275	120	155
Georgian Bluffs	140	95	35
Arran-Elderslie	100	40	60
Hanover	100	45	55
Brockton	70	30	45
Meaford	65	25	35
Kincardine	60	50	10
Total residents with a usual place of work	1,930	930	955
# of residents working outside of Chatsworth	1,615	765	810
% of residents working outside of Chatsworth	84%	82%	85%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Chatsworth, 2021

Place of Residence	Total	Male	Female
Chatsworth	315	165	145
Owen Sound	135	65	70
West Grey	50	30	15
Georgian Bluffs	30	30	0
Grey Highlands	25	10	15
Saugeen Shores	20	0	15
Arran-Elderslie	15	0	15
Individuals With a Place of Work in Chatsworth	630	320	275
# of people working inside Chatsworth who live outside of Chatsworth	315	155	130
% of people working inside Chatsworth who live outside of Chatsworth	50%	48%	47%

Source: Statistics Canada, Commuting Flows Tables 2021.

Georgian Bluffs

Top Places to Work for Georgian Bluffs Residents, 2021

Place of Work	Total	Male	Female
Owen Sound	1,650	620	1,030
Georgian Bluffs	655	410	245
South Bruce Peninsula	290	125	160
Kincardine	165	160	10
Meaford	90	40	50
Arran-Elderslie	75	40	40
Adelaide-Metcalf	55	25	30
Saugeen Shores	55	15	40
Total residents with a usual place of work	3,270	1,610	1,655
# of residents working outside of Georgian Bluffs	2,615	1,200	1,410
% of residents working outside of Georgian Bluffs	80%	75%	85%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Georgian Bluffs, 2021

Place of Residence	Total	Male	Female
Owen Sound	715	435	280
Georgian Bluffs	655	410	245
South Bruce Peninsula	290	235	55
Chatsworth	140	95	35
Meaford	90	45	45
Arran-Elderslie	40	20	15
Saugeen Shores	40	25	15
Individuals With a Place of Work in Georgian Bluffs	2,035	1,295	710
# of people working inside Georgian Bluffs who live outside of Georgian Bluffs	1,380	885	465
% of people working inside Georgian Bluffs who live outside of Georgian Bluffs	68%	68%	65%

Source: Statistics Canada, Commuting Flows Tables 2021.

Grey Highlands

Top Places to Work for Grey Highlands Residents, 2021

Place of Work	Total	Male	Female
Grey Highlands	1,005	475	540
Collingwood	195	70	125
Southgate	160	105	55
The Blue Mountains	160	95	65
Owen Sound	160	50	110
Clearview	140	85	55
Meaford	105	40	65
Shelburne	75	35	30
Brampton	70	70	0
Total residents with a usual place of work	2,540	1,325	1,195
# of residents working outside of Grey Highlands	1,535	850	655
% of residents working outside of Grey Highlands	60%	64%	55%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Grey Highlands, 2021

Place of Residence	Total	Male	Female
Grey Highlands	1,005	475	540
Chatsworth	275	120	155
West Grey	270	130	140
Southgate	195	90	105
Owen Sound	125	105	25
Meaford	95	45	50
Individuals With a Place of Work in Grey Highlands	2,280	1,120	1,110
# of people working inside Grey Highlands who live outside of Grey Highlands	1,275	645	570
% of people working inside Grey Highlands who live outside of Grey Highlands	56%	58%	51%

Source: Statistics Canada, Commuting Flows Tables 2021.

Hanover

Top Places to Work for Hanover Residents, 2021

Place of Work	Total	Male	Female
Hanover	1,540	680	865
Brockton	285	190	95
Kincardine	105	85	20
West Grey	80	35	45
Southgate	75	50	25
Arran-Elderslie	60	25	30
Owen Sound	50	20	30
Grey Highlands	45	25	20
Wellington North	30	30	0
New Tecumseth	30	30	0
Total residents with a usual place of work	2,475	1,285	1,165
# of residents working outside of Hanover	935	605	300
% of residents working outside of Hanover	38%	47%	26%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Hanover, 2021

Place of Residence	Total	Male	Female
Hanover	1,540	680	865
West Grey	925	345	580
Brockton	660	305	355
South Bruce	210	80	130
Arran-Elderslie	125	30	100
Chatsworth	100	45	55
Individuals With a Place of Work in Hanover	3,875	1,650	2,215
# of people working inside Hanover who live outside of Hanover	2,335	970	1,350
% of people working inside Hanover who live outside of Hanover	60%	59%	61%

Source: Statistics Canada, Commuting Flows Tables 2021.

Meaford

Top Places to Work for Meaford Residents, 2021

Place of Work	Total	Male	Female
Meaford	1,060	480	580
Owen Sound	790	265	525
The Blue Mountains	400	225	175
Collingwood	235	120	115
Grey Highlands	95	45	50
Georgian Bluffs	90	45	45
Total residents with a usual place of work	2,905	1,330	1,535
# of residents working outside of Meaford	1,845	850	955
% of residents working outside of Meaford	64%	64%	62%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Meaford, 2021

Place of Residence	Total	Male	Female
Meaford	1,060	480	580
Owen Sound	210	125	85
Grey Highlands	105	40	65
Georgian Bluffs	90	40	50
Chatsworth	65	25	35
The Blue Mountains	65	10	50
Collingwood	55	10	45
Individuals With a Place of Work in Meaford	1,755	775	955
# of people working inside Meaford who live outside of Meaford	695	295	375
% of people working inside Meaford who live outside of Meaford	40%	38%	38%

Source: Statistics Canada, Commuting Flows Tables 2021

Owen Sound

Top Places to Work for Owen Sound Residents, 2021

Place of Work	Total	Male	Female
Owen Sound	4,525	1,890	2,630
Georgian Bluffs	715	435	280
Meaford	210	125	85
Chatsworth	135	65	70
Grey Highlands	125	105	25
Kincardine	120	100	20
South Bruce Peninsula	120	50	75
Adelaide-Metcalf	105	50	50
New Tecumseth	75	50	25
Saugeen Shores	55	35	15
Total residents with a usual place of work	6,515	3,080	3,390
# of residents working outside of Owen Sound	1,990	1,190	760
% of residents working outside of Owen Sound	31%	39%	22%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Owen Sound, 2021

Place of Residence	Total	Male	Female
Owen Sound	4,525	1,890	2,630
Georgian Bluffs	1,650	620	1,030
Meaford	790	265	525
Chatsworth	550	225	330
South Bruce Peninsula	415	130	285
Arran-Elderslie	245	70	170
Saugeen Shores	215	60	155
Grey Highlands	160	50	110
West Grey	115	30	85
Individuals With a Place of Work in Owen Sound	8,975	3,475	5,480
# of people working inside Owen Sound who live outside of Owen Sound	4,450	1,585	2,850
% of people working inside Owen Sound who live outside of Owen Sound	50%	46%	52%

Source: Statistics Canada, Commuting Flows Tables 2021.

Southgate

Top Places to Work for Southgate Residents, 2021

Place of Work	Total	Male	Female
Southgate	485	280	210
Wellington North	440	240	200
Grey Highlands	195	90	105
Shelburne	185	60	120
Orangeville	175	80	95
New Tecumseth	110	85	25
Brampton	105	75	30
Toronto	95	75	20
Mississauga	70	45	25
West Grey	55	25	30
Total residents with a usual place of work	2,295	1,215	1,025
# of residents working outside of Southgate	1,810	935	815
% of residents working outside of Southgate	79%	77%	80%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for Southgate, 2021

Place of Residence	Total	Male	Female
Southgate	485	280	210
West Grey	350	175	175
Grey Highlands	160	105	55
Wellington North	100	60	40
Hanover	75	50	25
Brockton	45	15	30
Melancthon	35	25	15
Individuals With a Place of Work in Southgate	1,470	810	615
# of people working inside Southgate who live outside of Southgate	985	530	405
% of people working inside Southgate who live outside of Southgate	67%	65%	66%

Source: Statistics Canada, Commuting Flows Tables 2021.

West Grey

Top Places to Work for West Grey Residents, 2021

Place of Work	Total	Male	Female
Hanover	925	345	580
West Grey	550	235	315
Wellington North	365	205	160
Southgate	350	175	175
Brockton	280	125	155
Grey Highlands	270	130	140
Minto	135	70	55
Kincardine	120	100	20
Arran-Elderslie	120	60	60
Owen Sound	115	30	85
Total residents with a usual place of work	3,855	1,895	1,895
# of residents working outside of West Grey	3,305	1,660	1,580
% of residents working outside of West Grey	86%	88%	83%

Source: Statistics Canada, Commuting Flows Tables 2021.

Top Labour Recruitment Areas for West Grey, 2021

Place of Residence	Total	Male	Female
West Grey	550	235	315
Hanover	80	35	45
Southgate	55	25	30
Wellington North	45	25	25
Brockton	40	20	20
South Bruce	30	15	10
Chatsworth	25	25	0
Individuals With a Place of Work in West Grey	945	430	495
# of people working inside West Grey who live outside of West Grey	395	195	180
% of people working inside West Grey who live outside of West Grey	42%	45%	36%

Source: Statistics Canada, Commuting Flows Tables 2021.



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