



Grey County

SITUATIONAL ANALYSIS

Situational Analysis For Grey County



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1 Data Sources

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

- The 2006 and 2011 Census from Statistics Canada
- Superdemographics 2014 from Manifold Data Mining Inc.
- EMSI Data: EMSI combines employment data from Survey of Employment, Payrolls and Hours (SEPH) with data from the Labour Force Survey (LFS), Census, and Canadian Business Patterns (CBP) to form detailed geographic estimates of employment. Projections are based on the latest available EMSI industry data, 10-year past local trends in each industry and growth rates from national industry projections from the Canadian Occupational Projection System (COPS) produced by Human Resources and Skills Development Canada.

Manifold Projection Method

2014 Demographic data are population statistics collected by Statistics Canada via Census every five years. The most recent Census was conducted in May 2011. The upcoming Census will be conducted in May 2016. There is normally one to two years time lag between collecting and publishing Census data. For example, the first batch of 2011 Census, population and dwelling, were released by Statistics Canada in February 2012. The last batch, income and housing, is scheduled for release in August 2013.

As census is conducted every five years and there is a 1-2 years lag in collecting and publishing census data, Manifold estimate demographic data between the census years and project for 1, 5, 10, and 15 years in the future. Manifold update techniques are based on the following techniques:

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

Manifold Data Source:

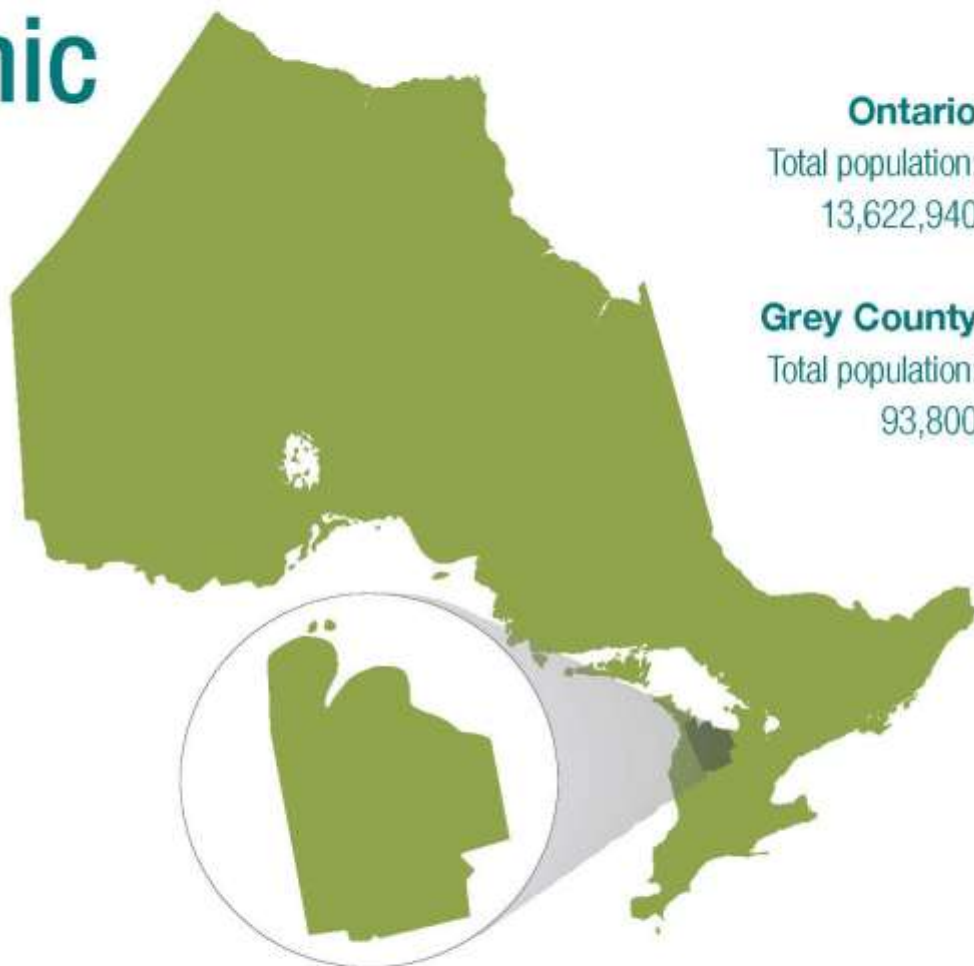
- Statistics Canada
- Health Canada
- Regional Health Ministries
- Citizenship and Immigration Canada
- Regional School Boards
- Brisc International Inc.
- Flyer Distribution Association
- Real Estate Boards/Companies
- Canadian Bankers Association
- Bank of Canada
- Canada Post Corporation
- Consumer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

Grey County

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Geographic

Grey County is located in Southwestern Ontario along Georgian Bay. The area is home to a resident population of 93,800 and a workforce of over 52,000. Grey has a balanced number of workers commuting into and out of the County for work.



Ontario

Total population:
13,622,940

Grey County

Total population:
93,800

17%

of non-residents
commute into Grey County
for work



19%

of residents
commute out of
Grey County for work

Grey County

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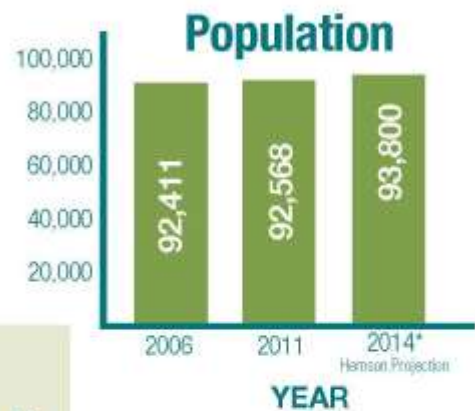
Demographic

Grey County is displaying slow but positive population growth. The community has an older population than the province and the average value of a dwelling is lower than that of Ontario.

 **1.5%**

Ontario Growth Rate = 12%

48 **Median Age**
Ontario Median Age = 41



Average value of dwelling
\$352,775

Provincial average is \$429,129



9.4%
Mobility

Versus
11.7% ON

Residents that had moved
within the previous year

32.1%
Mobility

Versus
37.8% ON

Residents that had moved
within the previous 5 years

51% 

**Population
by gender**

 **49%**

Grey County

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Labour Force ↓ **64.6%** Participation

Employment **60.3%** ↓

↓ **6.5%** Unemployment

\$ Median income \$29,845
Average income \$38,938

Grey County is home to a diverse local economy. The participation, employment rates and unemployment rate are lower than the provincial average. The average and median incomes are also lower than those of Ontario.

Key Sectors by Industry



Key Sectors by Occupation



2 Statistical Overview of Grey County

Table 1 provides the 2014 statistical estimates based on 2011 census data for Grey County and Ontario.

Table 1: Statistical Overview of Grey County vs. Ontario, 2014¹

Topic	Demographic Variable	Grey County	Ontario
Population	Total population	95,047	13,622,940
	Projected population 2019	95,418	14,558,836
	Projected population 2024	95,694	15,503,704
Labour Force²	Total population 15 years and over	81,607	11,393,642
	In the labour force	52,677	7,549,583
	Participation rate (%)	64.55	66.26
	Employment rate (%)	60.33	61.34
	Unemployment rate (%)	6.54	7.43
Income (\$) ³	Average total per capita income (2013) (\$)	38,938	44,752
	Median total per capita income (2013) (\$)	29,845	31,800
	Average household income (2013) (\$)	75,102	90,520
	Median household income (2013) (\$)	60,012	68,967
Households	Total number of private households	39,552	5,231,222
	Average number of persons in private households	2.36	2.56
Dwelling	Total number of occupied private dwellings	39,552	5,231,222
	Average value of dwelling (\$)	352,775	429,129

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

¹ The content of the report is derived from Manifold's proprietary postal code information. No confidential information about an individual, household, organization or business has been obtained from Statistics Canada.

² Labour force - Refers to persons who were either employed or unemployed. Participation rate - Refers to the labour force expressed as a percentage of the population 15 years and over excluding institutional residents. Employment rate - Refers to the number of persons employed expressed as a percentage of the total population 15 years and over, excluding institutional residents. Unemployment rate - Refers to the unemployed expressed as a percentage of the labour force.

³ Note that Income variables always use the data from the previous year.

The following table provides an overview of statistical changes in Grey County.

Table 2: Statistical Overview of Demographic Changes for Grey C. and Ontario, Census

Topic	Demographic Variable	Grey County		Ontario	
		2006	2011	2006	2011
Population	Total Population	92,411	92,568	12,160,282	12,851,821
	Children & Youth (0-14)	Increased		Increased	
	Adult (15-64)	Decreased		Increased	
	Segments 65 and up	Increased		Increased	

Source: McSweeney & Associates from Statistics Canada 2006 and 2011 Census data.

Table 3: Statistical Overview of Demographic Changes for Grey C. and Ontario, Census/Manifold

Topic	Demographic Variable	Grey County		Ontario		Percent Change 2006-2014	
		2006	2014 ⁴	2006	2014	Grey	Ontario
Labour Force	Employed population 15 years and over	75,695	81,607	9,819,420	11,393,642	7.81	16.03
	Participation rate (%)	64.6	64.55	67.1	66.26	-0.08	-1.25
	Employment rate (%)	61.2	60.33	62.8	61.34	-1.42	-2.32
	Unemployment rate (%)	5.2	6.54	6.4	7.43	25.77	16.09
Income (\$)	Median family income (\$)	59,978	74,224	72,734	85,523	23.75	17.58
	Median household income (\$)	49,912	60,012	60,455	68,967	20.24	14.08
Households	Total number of private households	37,180	39,552	4,555,025	5,231,222	6.38	14.85
Dwelling Value	Average value of dwelling (\$)	244,305	352,775	297,479	429,129	44.40	44.26

Source: McSweeney & Associates from Statistics Canada 2006 Census data; Manifold Data Mining Inc. Superdemographics 2014.

⁴ 2014 data is obtained through Manifold and is not directly comparable to Census data.

3 Demographic Analysis

3.1 Population and Age Structure Profile

Table 4 illustrates the population change in Grey County from 2001 to 2014 in comparison to that of Ontario. The population in Grey County kept increasing since 2001. However, it increased at a slower pace compared to Ontario.

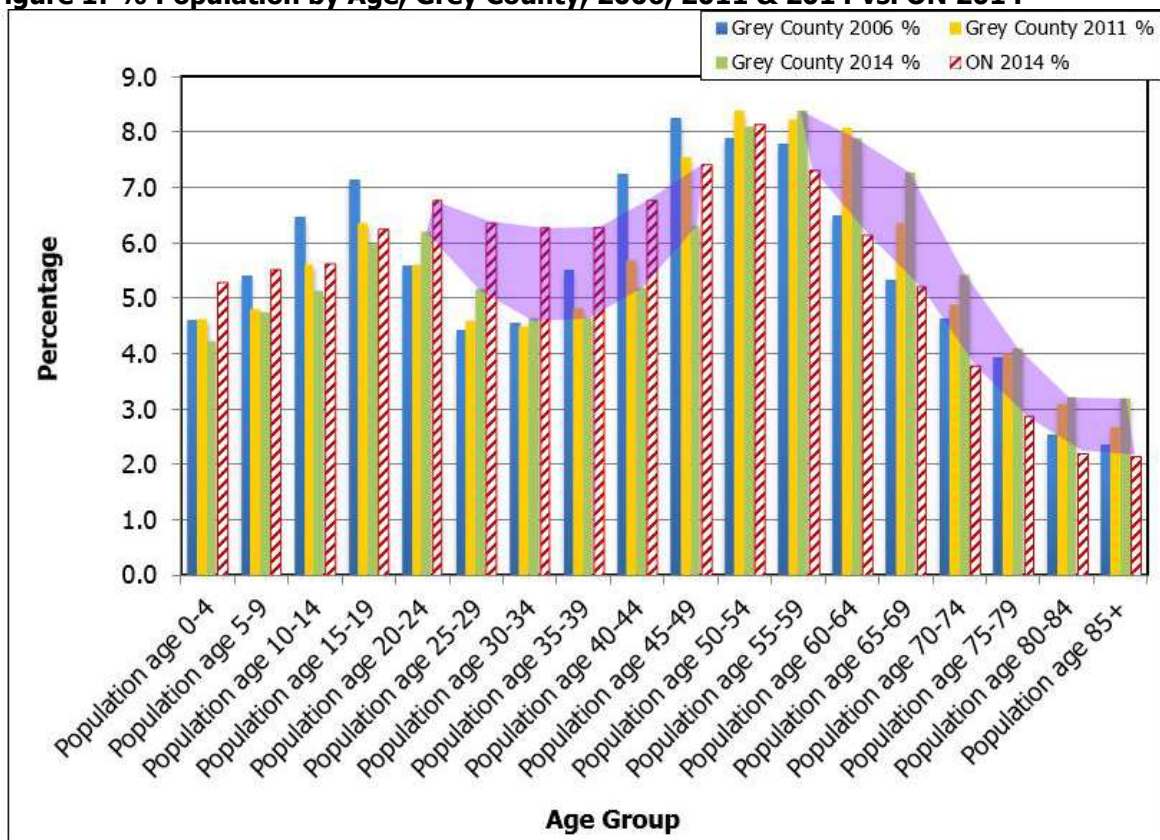
Table 4: Population Change, Grey County vs. Ontario, 2001 to 2014

	2001	2006	2011	2014
Grey County Population Count	89,073	92,411	92,568	95,047
% Change from Previous Census	/	3.7	0.2	2.7
Ontario Population Count	11,410,046	12,160,282	12,851,821	13,622,941
% Change from Previous Census	/	6.6	5.7	6.0

Source: McSweeney & Associates from Statistics Canada Census data 2006, 2011 and 2014⁵

Figure 1, and Tables 9 and 10 in the Appendix, represent the changing demographics of Grey County compared to Ontario.

Figure 1: % Population by Age, Grey County, 2006, 2011 & 2014 vs. ON 2014



Source: McSweeney & Associates from Statistics Canada Census data 2006, 2011 and Manifold Data Mining Inc. Superdemographics 2014.

Grey County compared to Ontario, 2014:

⁵ Census data 2006: Statistics Canada, 2006 Electronic Profile. Census data 2011: Statistics Canada; 2011 Census of Population.

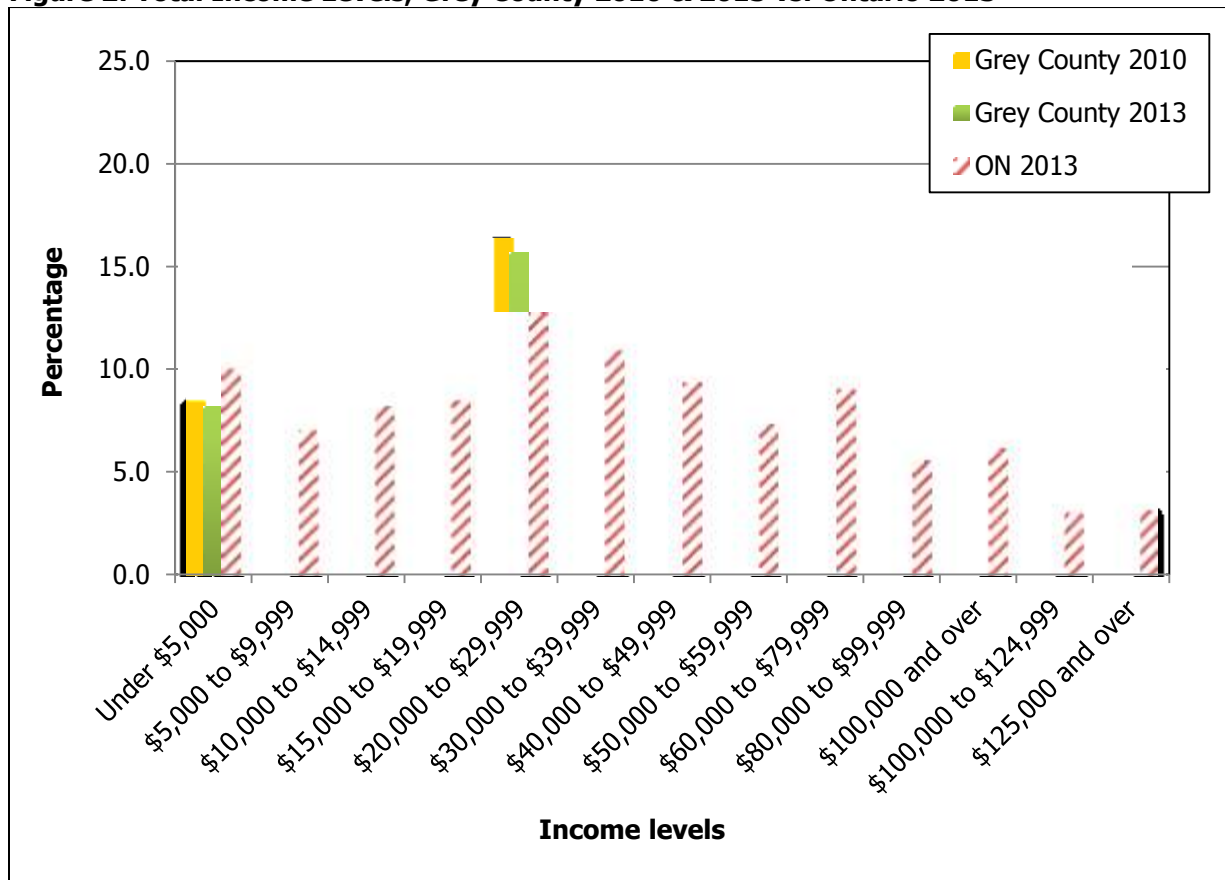
- The 55-59 age segment is the largest of all age segments in Grey County, while in Ontario the largest is the 50-54 age segment.
- Notable are the age gaps from 20-49, the prime labour force age segments, where Grey has lower population numbers and the in the segments between 55 and 85+ where Grey has higher numbers than the province.
- Overall, Grey County's age profile indicates an older population than that of Ontario. The median age of 48.15 is higher than the provincial median of 41.34, as is the average age of 45.06 versus the provincial average of 40.81.

3.2 Grey County Incomes

Using the information in Figures 2 and 3, as well Tables 11-14 (in the Appendix), the following observations can be made with respect to incomes⁶:

- Compared to Ontario, the percentage of Grey County residents who are making more than \$60,000 annually was smaller than that of Ontario.
- The largest percentage of Grey County's income level was the income segment between \$20,000 and \$29,999 annually.
- In 2013, Grey County's average and median total and household income levels were lower than Ontario.

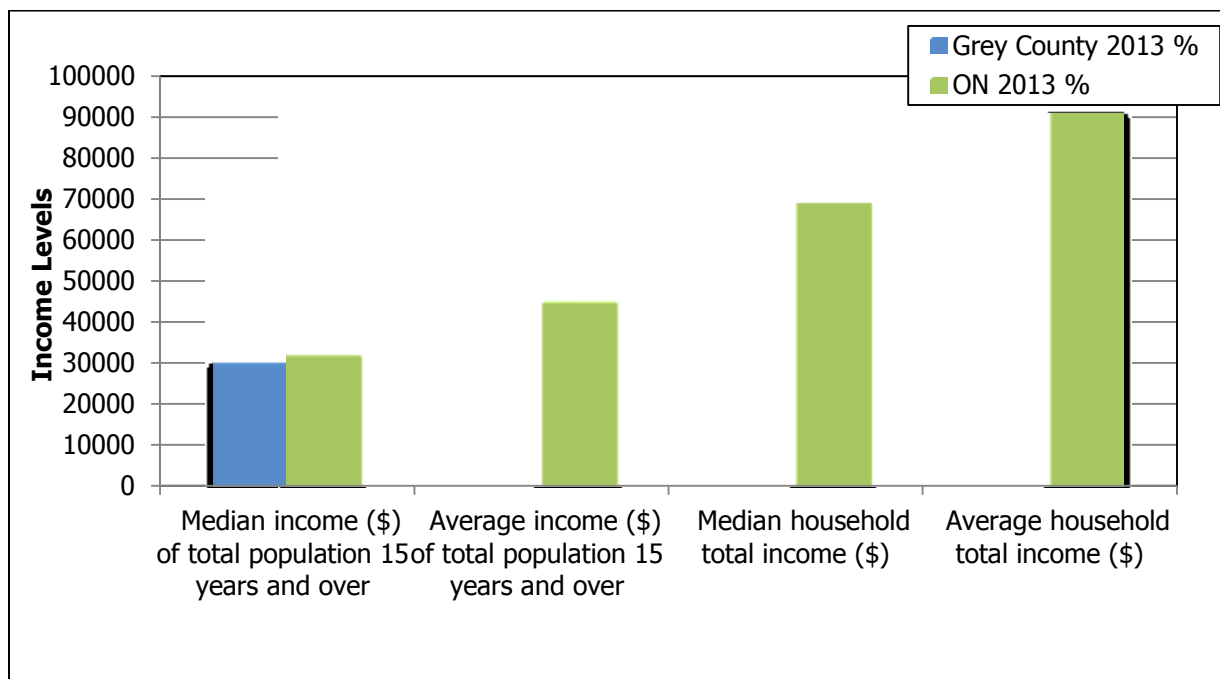
Figure 2: Total Income Levels, Grey County 2010 & 2013 vs. Ontario 2013



Source: McSweeney & Associates from Statistics Canada Census data 2011 (2010 incomes) and Manifold Data Mining Inc. Superdemographics 2014 (2013 incomes)

Figure 3: Average and Median Income, Grey County vs. Ontario, 2013⁷

⁶ As noted previously, all income data uses the year previous; therefore 2014 data uses 2013 incomes.



McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014 (2013 incomes)

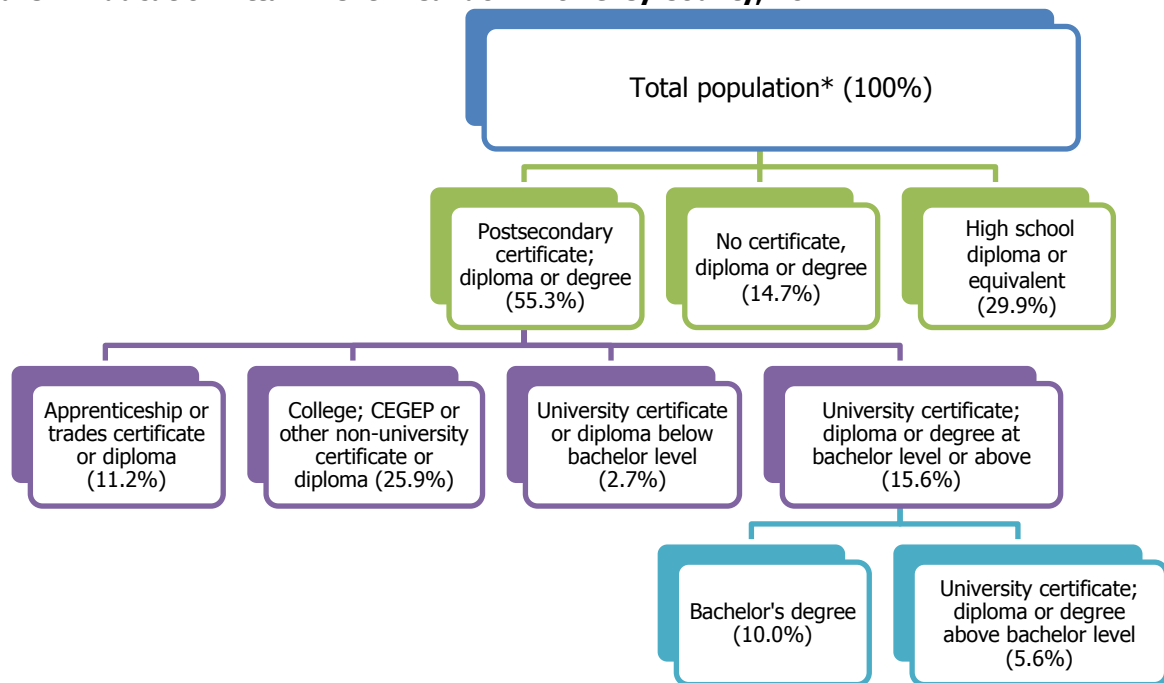
⁷ Total income - Total income refers to monetary receipts from certain sources, before income taxes and deductions, during calendar year 2013. It includes employment income from wages, salaries, tips, commissions and net income from self-employment (for both unincorporated farm and non-farm activities); income from government sources, such as social assistance, child benefits, employment insurance, old age security pension, Canada or Quebec pension plan benefits and disability income; income from employer and personal pension sources, such as private pensions and payments from annuities and RRIFs; income from investment sources, such as dividends and interest on bonds, accounts, GICs and mutual funds; and other regular cash income, such as child support payments received, spousal support payments (alimony) received and scholarships. The monetary receipts included are those that tend to be of a regular and recurring nature. It excludes one-time receipts, such as lottery winnings, gambling winnings, cash inheritances, lump sum insurance settlements, capital gains and RRSP withdrawals. Capital gains are excluded because they are not by their nature regular and recurring. It is further assumed that they are less likely to be fully spent in the period in which they are received, unlike income that is regular and recurring. Also excluded are employer's contributions to registered pension plans, Canada and Quebec pension plans, and employment insurance. Finally, voluntary inter-household transfers, imputed rent, goods and services produced for barter, and goods produced for own consumption are excluded from this total income definition. Median income of individuals - The median income of a specified group of income recipients is that amount which divides their income size distribution into two halves, i.e., the incomes of the first half of individuals are below the median, while those of the second half are above the median. Median income is calculated from the individuals with income in that group (e.g., males aged 45 to 54 years). Average income of individuals - Average income of individuals refers to the weighted mean total income of individuals aged 15 years and over who reported income for 2013. Average income is calculated from unrounded data by dividing the aggregate income of a specified group of individuals (e.g., males aged 45 to 54 years) by the number of individuals with income in that group. Median and average of individuals will be calculated for those individuals who are at least aged 15 years and who have an income (positive or negative). Household total income - The total income of a household is the sum of the total incomes of all members of that household. Total income - Total of income from all sources, including employment income, income from government programs, pension income, investment income and any other money income. Median income of households - The median income of a specified group of households is that amount which divides their income size distribution, ranked by size of income, into two halves. That is, the incomes of the first half of the households are below the median, while those of the second half are above the median. Median incomes of households are normally calculated for all units in the specified group, whether or not they reported income. Average income of households - Average income of households refers to the weighted mean total income of households in 2013. Average income is calculated from unrounded data by dividing the aggregate income of a specified group of households (for example, two person households) by the number of households in that specific group, whether or not they reported income. Household, private - Refers to a person or a group of persons (other than foreign residents) who occupy the same private dwelling and do not have a usual place of residence elsewhere in Canada. Household members who are temporarily absent on May 10, 2014 (e.g., temporarily residing elsewhere) are considered as part of their usual household. Every person is a member of one and only one household.

3.3 Education

Figures 4 and 5, and Table 15 in the Appendix, outline the education levels obtained by Grey County's residents (aged 25-64) as compared to Ontario.⁸

The following figure provides a visual breakdown of the educational attainment levels of the Grey County population aged 25-64 in 2014. Definitions may be found in the footnotes.

Figure 4: Education Attainment Breakdown for Grey County, 2014⁹



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

*Population aged 25 to 64 in Grey County.

Based on the following figure, it can be concluded that:

⁸ 2001 Census data is not directly comparable to 2006 Census data.

⁹ 'Highest certificate diploma or degree' refers to the highest certificate diploma or degree completed based on a hierarchy which is generally related to the amount of time spent 'in-class.' For postsecondary completers a university education is considered to be a higher level of schooling than a college education while a college education is considered to be a higher level of education than in the trades. Although some trades requirements may take as long or longer to complete than a given college or university program the majority of time is spent in on-the-job paid training and less time is spent in the classroom. For further definitions refer to the National Household Survey Dictionary Catalogue no. 99-000-X. For any comments on collection dissemination or data quality for this variable refer to the Education Reference Guide National Household Survey Catalogue no. 99-012-X2011006.

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

'Postsecondary 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.

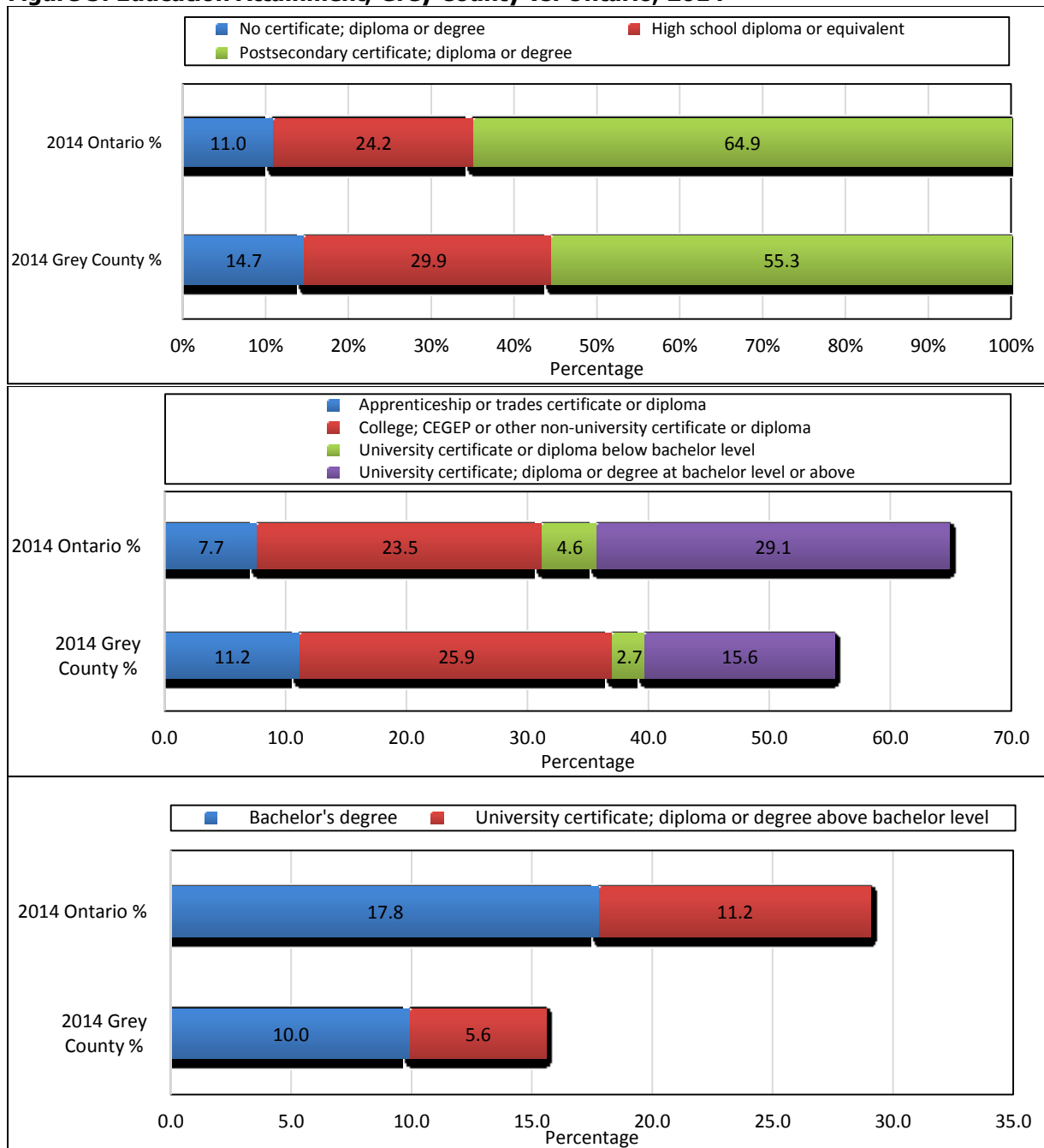
'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates (including Certificate of Qualification Journey person's designation) and other trades certificates or diplomas such as pre-employment or vocational certificates and diplomas from brief trade programs completed at community colleges institutes of technology vocational centres and similar institutions.

Comparisons with other data sources suggest that the category 'University certificate or diploma below the bachelor's level' was over-reported in the NHS. This category likely includes some responses that are actually college certificates or diplomas bachelor's degrees or other types of education (e.g. university transfer programs bachelor's programs completed in other countries incomplete bachelor's programs non-university professional designations). We recommend users interpret the results for the 'University certificate or diploma below the bachelor's level' category with caution.

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

- The percentage of Grey County residents who had a High school diploma or equivalent is higher than the provincial percentage in 2014.
- The percentage of Grey County residents who had a university certificate, diploma or degree at bachelor level or above is lower than that of Ontario in 2014.

Figure 5: Education Attainment, Grey County vs. Ontario, 2014



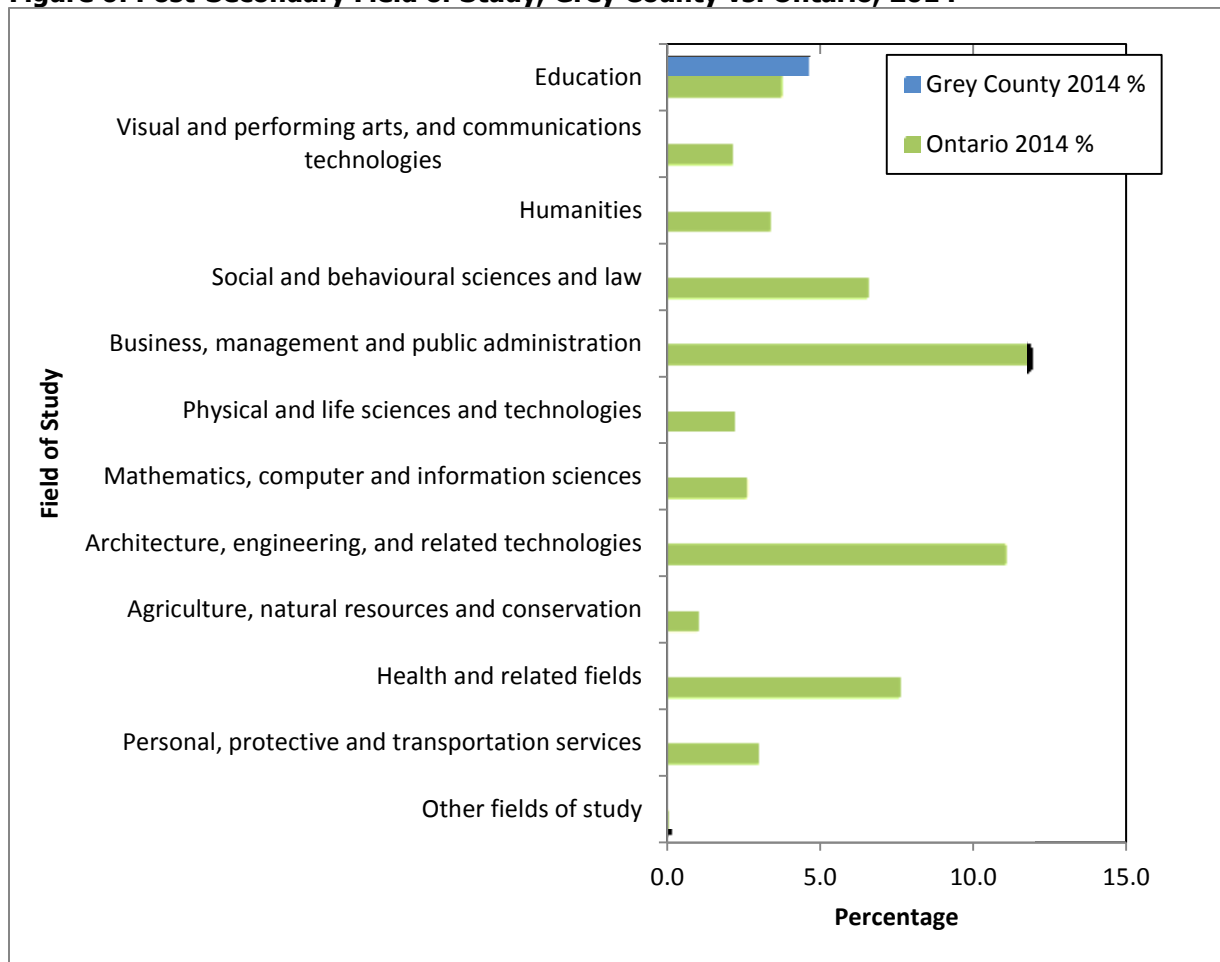
Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

3.4 Post-Secondary Field of Study

Based on Figure 6 and Table 16 (in the Appendix), the following observations can be made for persons aged 25-64 with post-secondary qualifications in 2014:

- The largest field of study by percentage was Architecture, engineering and related technologies - this percentage was slightly smaller than that of Ontario.
- Grey County also showed a competitive advantage in the fields of: Personal, protective and transportation services; and Health and related fields.

Figure 6: Post-Secondary Field of Study, Grey County vs. Ontario, 2014¹⁰

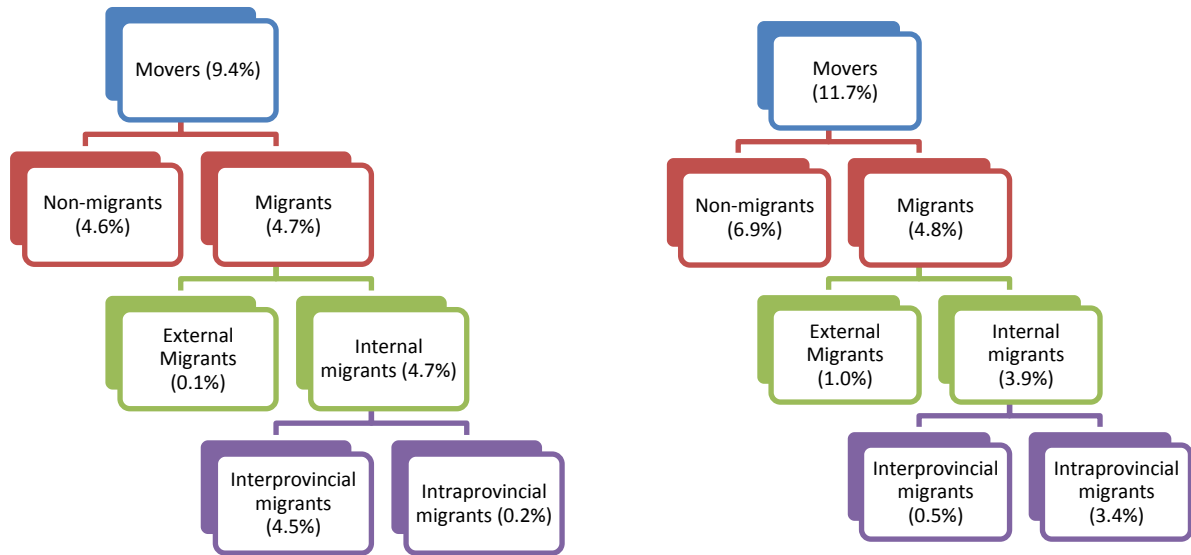


Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

¹⁰ 'Major field of study' is defined as the main discipline or subject of learning. It is collected for the highest certificate diploma or degree above the high school or secondary school level and classified according to the Classification of Instructional Programs (CIP) Canada 2011. This variable shows the 'primary groupings' a CIP variant. For more information on the CIP classification see the Classification of Instructional Programs Canada 2011 Catalogue no. 12-590-X available from: www.statcan.gc.ca/concepts/classification-eng.htm. For any comments on collection dissemination or data quality for this variable refer to the Education Reference Guide National Household Survey Catalogue no. 99-012-X2011006. 'No postsecondary certificate diploma or degree' includes persons who have not completed a registered apprenticeship certificate (including Certificate of Qualification Journeyman's designation) or other trades certificate or diploma a college CEGEP or other non-university certificate or diploma or a university certificate diploma or degree.

The mobility (refers to whether or not people lived in the same dwelling unit either one year or five years ago) of Grey County residents in 2014 can be seen in Figures 7 and 8, and Table 17 (in the Appendix). The following figure is a visual breakdown of the mobility status in Grey County compared to Ontario (2014 estimates data). Definitions may be found in the footnotes.

Figure 7: Mobility Status Breakdown, Grey County vs. Ontario, 1 Year Ago¹¹

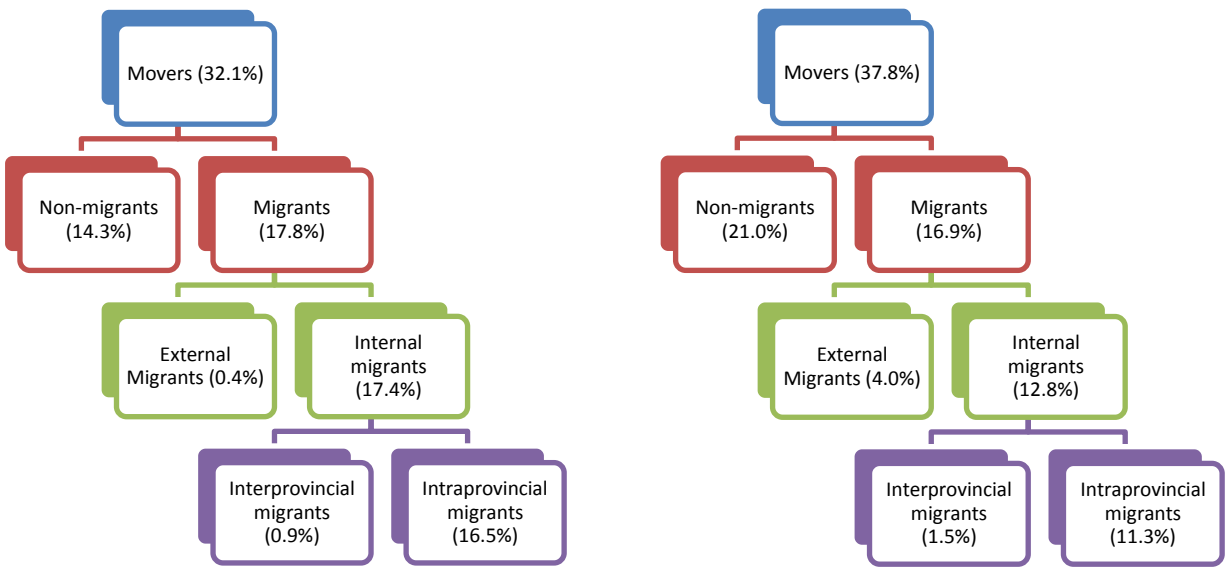


Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

In 2014, the percentage of Grey County residents that had moved within the previous year (9.4% movers) was slightly less than the percentage of “movers” in Ontario (11.7%). People moving to Grey County were much more likely to be relocating from other parts of Ontario as opposed to moving from outside of the province.

- ¹¹ Non-movers are persons who were living at the same address as the one at which they resided one year earlier.
- Movers are persons who were living at a different address from the one at which they resided one year earlier.
- Non-migrants are movers who were living at a different address, but in the same census subdivision (CSD) as the one they lived in one year earlier.
- Migrants are movers who were residing in a different CSD one year earlier (internal migrants) or who were living outside Canada one year earlier (external migrants).
- Intraprovincial migrants are movers who were living in a different CSD from the one at which they resided one year earlier, in the same province.
- Interprovincial migrants are movers who were living in a different CSD from the one at which they resided one year earlier, in a different province.

Figure 8: Mobility Status Breakdown, Grey County vs. Ontario, 5 Years Ago
 Grey County (2014) Ontario (2014)



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

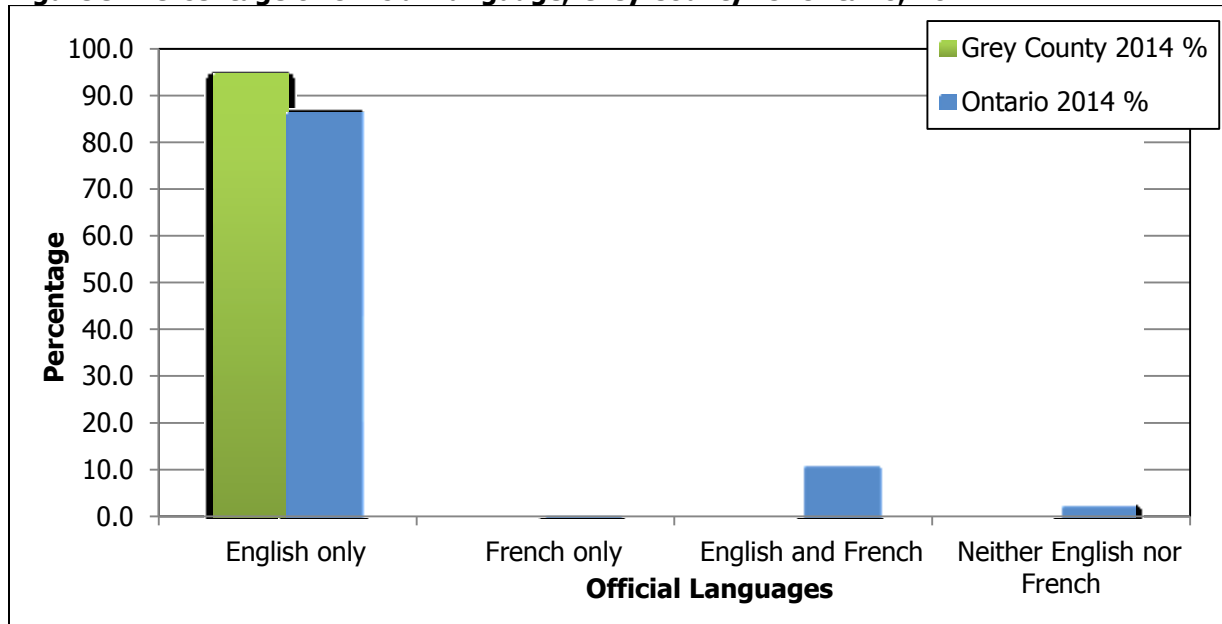
Figure 8 compares the mobility of Grey County residents five years ago to that of Ontario. The percentage of Grey County residents that had moved within the past five years was less than the percentage of “movers” in the province. People moving to Grey County were more likely to be relocating from within the province as opposed to moving from outside of Ontario.

3.6 Knowledge of Official Languages

Figure 9 and Table 18 (in the Appendix) illustrate the official languages spoken in Grey County compared to Ontario in 2014:

- Over 94% of residents in speak English only, which is higher than the provincial average.
- The percentage of residents that speak French and English is significantly lower than Ontario's average.

Figure 9: Percentage of Official Language, Grey County vs. Ontario, 2014



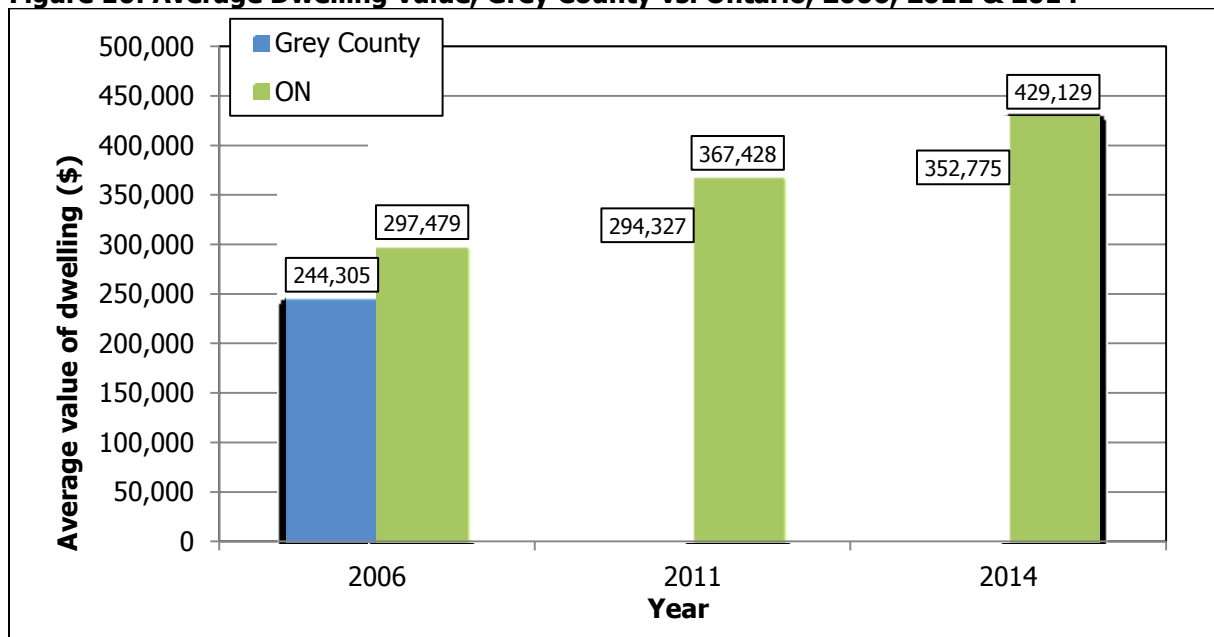
Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

3.7 Dwelling Characteristics

Figure 10 presents dwelling characteristics in Grey County for 2006, 2011 and 2014¹² as compared to the province:

- The total number of dwellings in Grey County increased from 37,180 in 2006 to 39,552 in 2014.
- The average value of dwellings in Grey County increased from \$244,305 in 2006 to \$352,775 in 2014, which is still below the provincial average.

Figure 10: Average Dwelling Value, Grey County vs. Ontario, 2006, 2011 & 2014



Source: McSweeney & Associates from Statistics Canada Census data 2006, 2011 and Manifold Data Mining Inc. Superdemographics 2014.

¹² 2014 Manifold Data Mining Inc. Superdemographics 2014 (based on the self-reported values of the 2011 census adjusted for inflation).

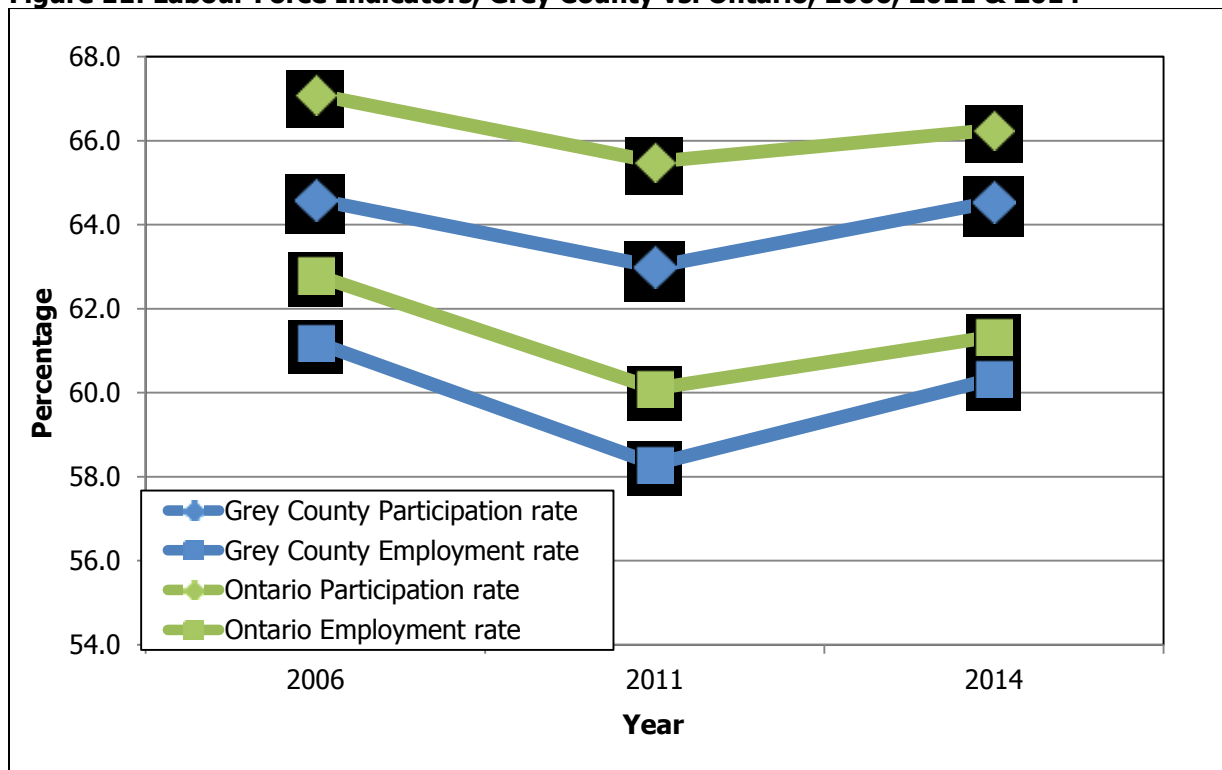
4 Labour Force Analysis

4.1 Key Indicators

Figures 11 and 12, along with Table 19 in the Appendix, provide a comparison of key labour force indicators for Grey County and Ontario from 2006 to 2014 (2014 estimates). The following observations can be made¹³:

- In 2006, 2011, and 2014, the labour force participation rates and employment rates were lower in Grey County when compared to the provincial rates.
- The unemployment rate in Grey County has increased from 2006 to 2011, then decreased from 2011 to 2014. It has remained lower than the Ontario average since 2006.

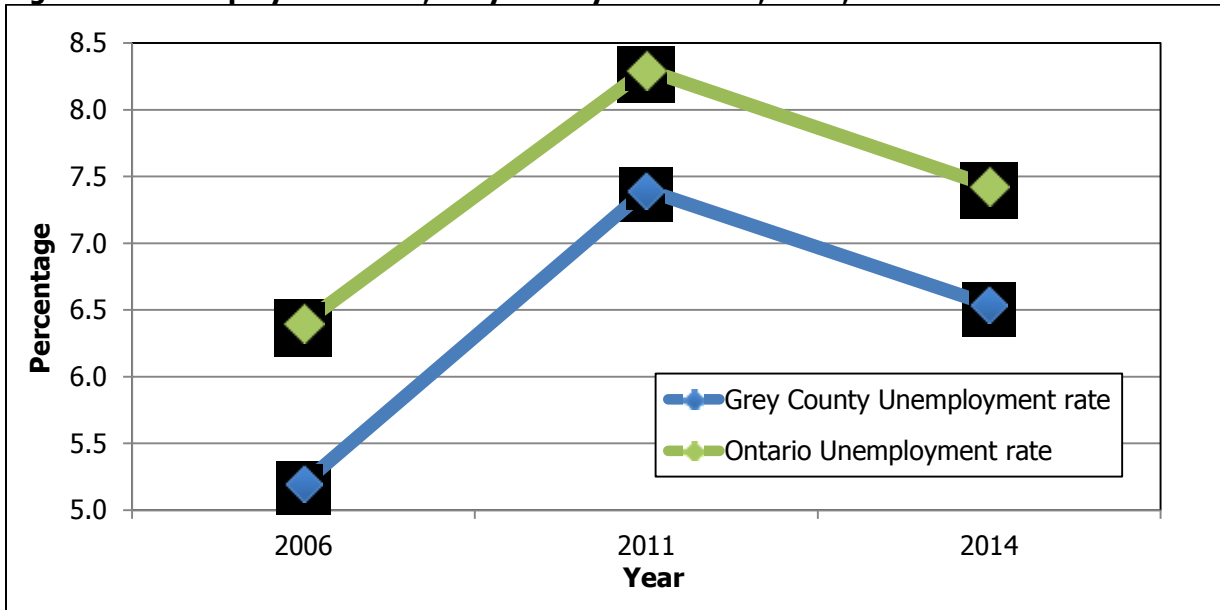
Figure 11: Labour Force Indicators, Grey County vs. Ontario, 2006, 2011 & 2014



Source: McSweeney & Associates from Statistics Canada Census data 2006, 2011 and Manifold Data Mining Inc. Superdemographics 2014.

¹³ Participation rate % = labour force / total population 15+
Employment rate % = employed / total population 15+
Unemployment rate % = unemployed / labour force

Figure 12: Unemployment Rate, Grey County vs. Ontario, 2006, 2011 & 2014

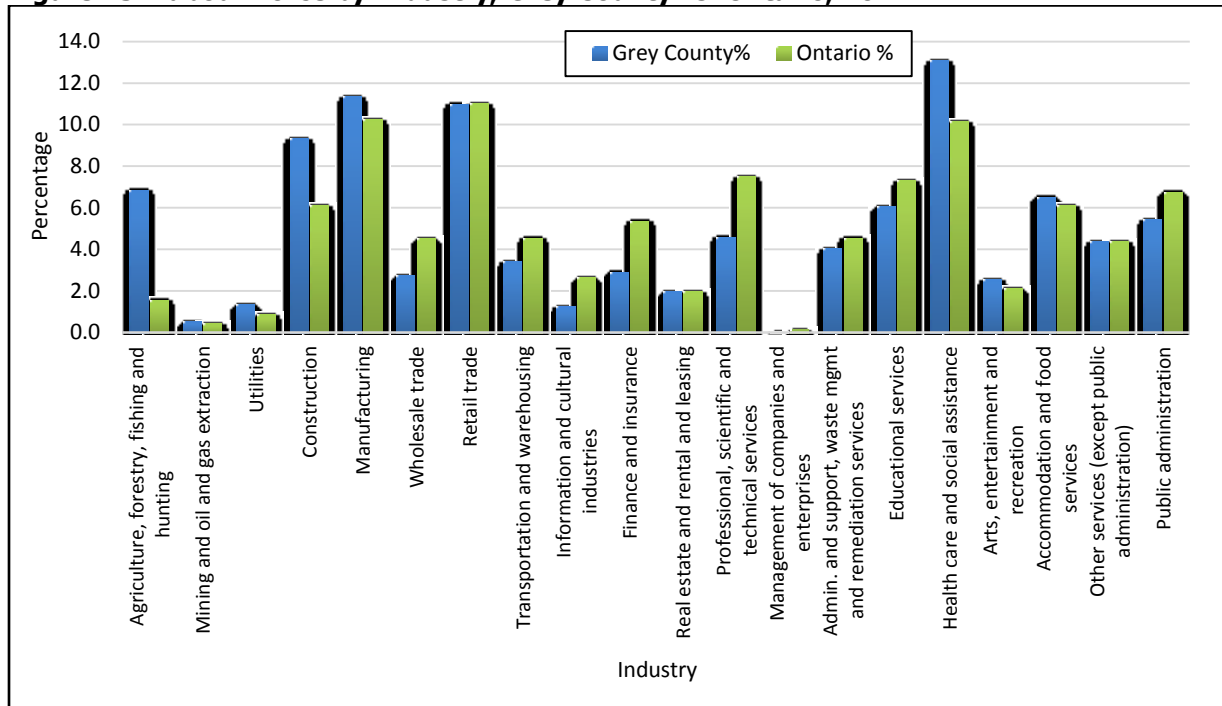


Source: McSweeney & Associates from Statistics Canada Census data 2006, 2011 and Manifold Data Mining Inc. Superdemographics 2014.

4.2 Labour Force by Industry

Figure 13, and Tables 20 and 21 (in the Appendix), indicate the industries worked in by Grey County's resident workforce.

Figure 13: Labour Force by Industry, Grey County vs. Ontario, 2014



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

In 2014, a larger percentage of Grey County's resident labour force worked in the following industries as compared to Ontario:

- Agriculture, forestry, fishing and hunting
- Construction
- Manufacturing
- Utilities
- Health care and social assistance
- Accommodation and food services.

A smaller percentage of Grey County's resident labour force, as compared to Ontario, worked in:

- Wholesale Trade
- Information and cultural industries
- Finance and insurance
- Professional, scientific and technical services
- Management of companies and enterprises
- Administrative and support, waste management and remediation services
- Public administration.

4.3 Labour Force by Occupation

Figure 14 and Table 22 (in the Appendix) compare the estimated percentages of the labour force in the Grey County to Ontario by occupation for 2014.

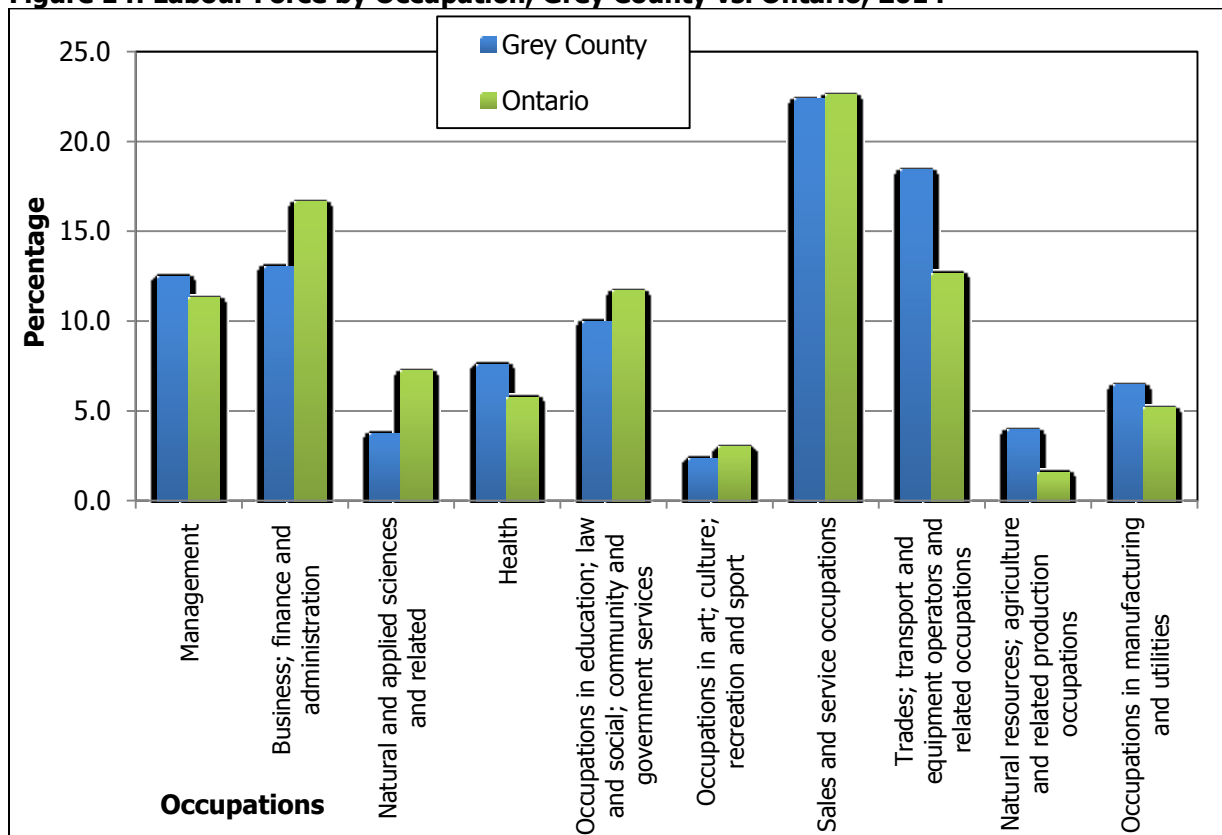
In comparison to the province, Grey County has larger percentages of its labour force working in:

- Management
- Trades; transport and equipment operators and related occupations
- Health
- Natural resources; agriculture and related production occupations
- Occupations in manufacturing and utilities

As compared to Ontario, Grey County has smaller percentages of its labour force working in:

- Sales and service
- Business, finance and administration
- Art, culture, recreation and sport
- Occupations in education; law and social; community and government services.

Figure 14: Labour Force by Occupation, Grey County vs. Ontario, 2014



Source: McSweeney & Associates Manifold Data Mining Inc. Superdemographics 2014.

4.4 Commuting Flow

The following two tables provide information on persons reporting a “usual place of work other than in their home or outside of Canada”, and reveal the following regarding labour force commuting:

- The majority of the Grey County resident labour force who worked outside of Grey County commuted to work in the Town of Collingwood, Municipality of Brockton and the Town South Bruce Peninsula.
- The largest number of non-resident labour force commuting to work in Grey County travelled from Town of Collingwood, Municipality of Brockton and the Town South Bruce Peninsula.
- 19.1% of the workers living in Grey County had a usual place of work outside of Grey County.
- 17.2% of workers declaring a usual place of work in Grey County lived outside of Grey County.

Table 5: Where Grey County Resident Labour Force Works, 2011

Place of Work	Total	Male	Female
Grey County	23,700	10,535	13,040
Arran-Elderslie, MU	365	150	165
Barrie, CY	100	80	20
Brampton, CY	55	45	0
Brockton, MU	820	335	430
Centre Wellington, TP	20	15	0
Clearview, TP	215	40	115
Collingwood, T	1,015	390	630
Essa, TP	20	0	0
Guelph, CY	190	85	85
Kincardine, MU	465	415	20
London, CY	55	25	0
Midland, T	30	0	0
Minto, T	150	60	55
Mississauga, CY	100	45	25
New Tecumseth, T	90	75	0
North Perth, MU	45	30	0
Oakville, T	40	0	0
Orangeville, T	60	0	35
Ottawa, CV	35	0	0
Saugeen 29, IRI	25	0	0
Saugeen Shores, T	125	35	65
Shelburne, T	75	50	25
South Bruce Peninsula, T	745	365	390
South Bruce, MU	75	25	50
Toronto, C	330	165	70
Wasaga Beach, T	20	0	0
Waterloo, CY	30	0	0
Wellington North, TP	310	155	125
Total Resident Labour Force	29,305	13,120	15,345
<i>Total resident labour force with a usual place of work outside of Grey County</i>	<i>5,605</i>	<i>2,585</i>	<i>2,305</i>
<i>Percent of residents declaring a place of work outside of Grey County</i>	<i>19.1%</i>	<i>19.7%</i>	<i>15.0%</i>

Source: Statistics Canada, 2011 National Household Survey, Statistics Canada Catalogue no. 99-012-X2011032.
<http://bit.ly/1mhams3>¹⁴

¹⁴ Commuting Flow - Census Subdivisions: Sex (3) for the Employed Labour Force Aged 15 Years and Over Having a Usual Place of Work, for Census Subdivisions, Flows Greater than or Equal to 20, 2011 National Household Survey

Table 6: Place of Residence for Persons Working in Grey County, 2011

Place of Residence	Total	Male	Female
Grey County	24,080	10,680	13,280
Arran-Elderslie, MU	670	260	350
Brampton, CY	55	55	0
Brockton, MU	910	425	475
Clearview, TP	140	70	65
Collingwood, T	960	470	480
Hanover, RM	85	55	25
Howick, TP	20	0	25
Kincardine, MU	25	0	0
Minto, T	75	0	60
Northern Bruce Peninsula, MU	40	0	30
Saugeen Shores, T	420	140	195
Shelburne, T	25	0	15
South Bruce Peninsula, T	810	410	355
South Bruce, MU	330	115	185
Springwater, TP	25	25	0
Toronto, C	50	35	0
Vaughan, CY	40	0	40
Wasaga Beach, T	275	110	140
Wellington North, TP	20	0	0
Whitby, T	30	15	15
Total workforce working in Grey County	29,085	12,865	15,735
<i>Total non-resident workforce commuting to work to Grey County</i>	<i>5,005</i>	<i>2,185</i>	<i>2,455</i>
<i>Percent of workers (non-residents) commuting to work to Grey County</i>	<i>17.2%</i>	<i>17.0%</i>	<i>15.6%</i>

Statistics Canada, 2011 National Household Survey, Statistics Canada Catalogue no. 99-012-X2011032. <http://bit.ly/1mhams3>¹⁵

¹⁵ Commuting Flow - Census Subdivisions: Sex (3) for the Employed Labour Force Aged 15 Years and Over Having a Usual Place of Work, for Census Subdivisions, Flows Greater than or Equal to 20, 2011 National Household Survey

5 Economic Base Analysis

This section uses the number of “jobs” in Grey County as input for the economic base analysis. More specifically, by “jobs” we are referring to the employed labour force declaring a usual place of work in Grey County (outside of the home) versus labour force by place of residence. The employed labour force therefore includes Grey County residents and non-residents.

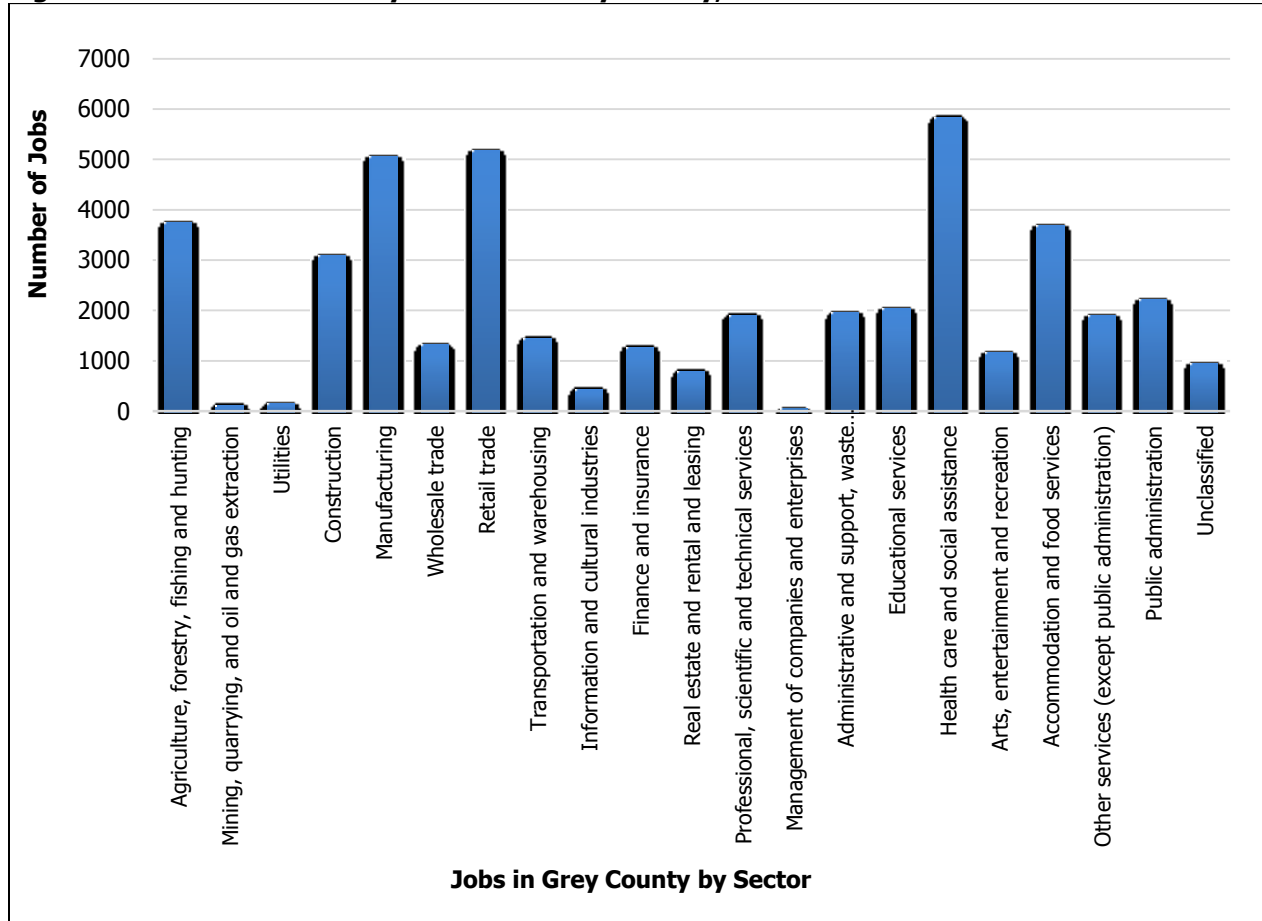
5.1 Employment Profile

The Statistics Canada “North American Industry Classification System” (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industries 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:



The following figure illustrates that there were 43,943 jobs in Grey County in 2014. With 5,825 jobs in 2014, the Health care and social assistance sector employer was the largest sector in Grey County.

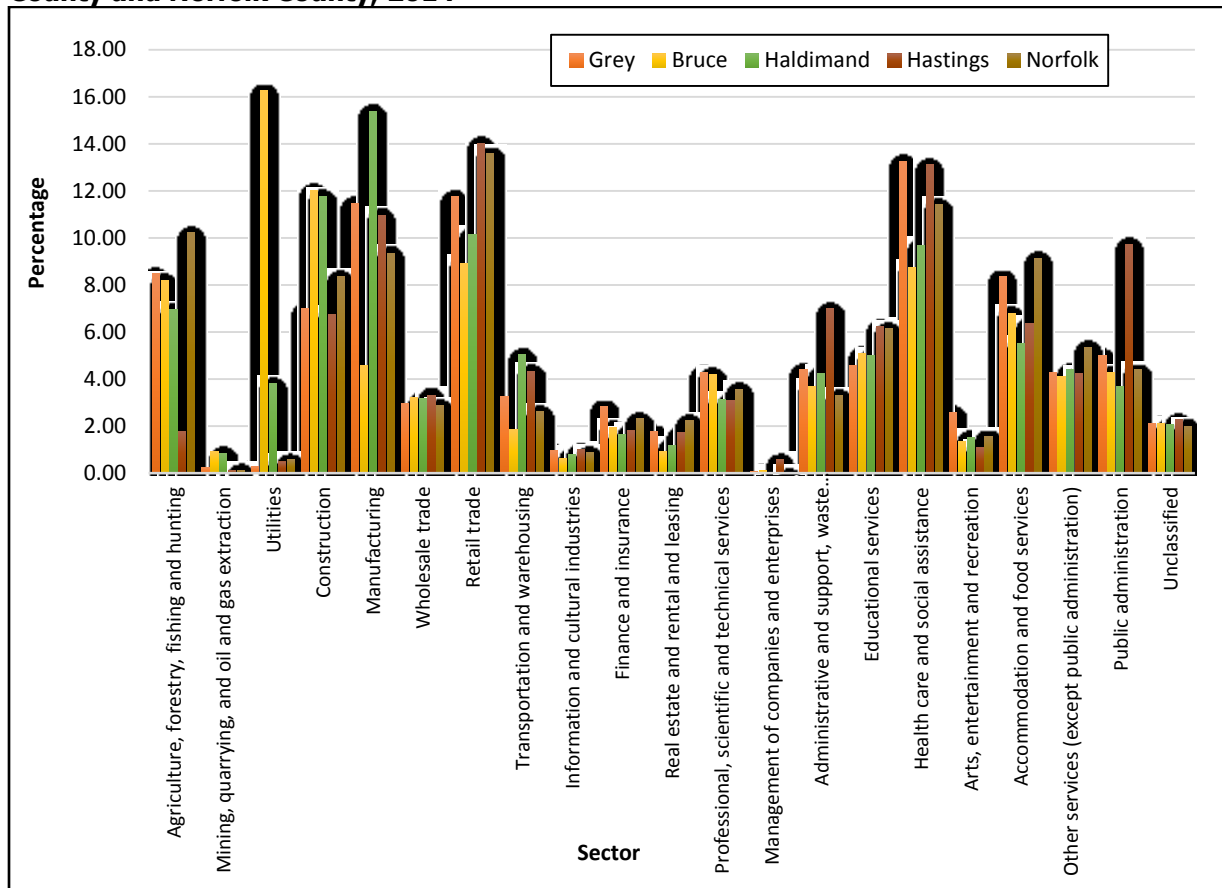
Figure 15: Number of Jobs by Sector for Grey County, 2014



Source: Employees & Self-Employed - EMSI 2014.1.

The following figure presents the percentage of jobs in each industry sector for Grey County, Bruce County, Haldimand County, Hastings County and Norfolk County. Grey County, when compared to Bruce County, Haldimand County, Hastings County and Norfolk County, had a higher percentage of jobs in Health care and social assistance and Professional, scientific and technical services.

Figure 16: Jobs Distribution, Grey County, Bruce County, Haldimand County, Hastings County and Norfolk County, 2014



Source: McSweeney & Associates from Employees & Self-Employed - EMSI 2014.1.

5.2 Location Quotient Analysis

An economic base analysis is an analysis of 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.

The economic base analysis helps determine which economic activities “bring money in”, and where money might be “leaking out”. While the actual flow of money in and out of Grey County would be the most accurate means of describing the economic base of the area, data or statistics for this form of cash flow analysis are not available. As such, a surrogate for cash flow is required, and the most common substitute is employment which uses an economic base analysis tool called “Location Quotient Analysis”. This method compares the level of employment concentration (or specialization) in Grey County to the level of employment concentration in one or more benchmark areas. In other words, does Grey County have proportionately more or less employees in specific industries than the benchmark area?

“Benchmarking” employment in Grey County to Ontario and Canada provides information on:

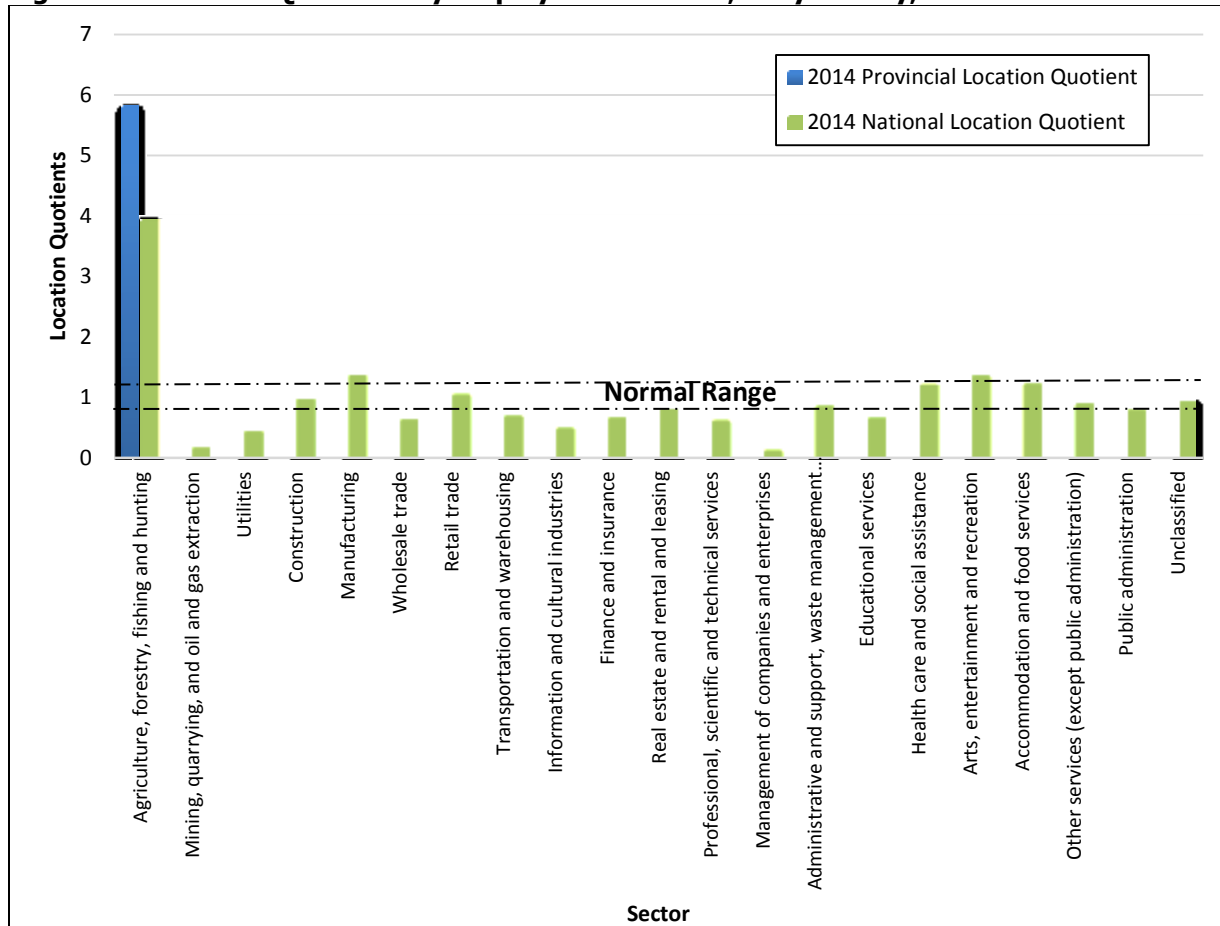
- The extent to which Grey County is producing all of the goods or services required for consumption in Grey County (this potentially identifies opportunities to replace the imports with locally provided goods and services).
- Whether the Grey County economy is producing goods or services in excess of quantities required for local consumption, indicating a high degree of development and specialization (or industry concentration) that results from the goods or services being consumed by non-residents.

The location quotient method is a “first cut” analysis that requires interpretation of the results, but it will point to the economic sectors that deserve a more thorough and in-depth analysis and “street-level” validation. A location quotient of between 0.75 and 1.25 generally indicates the local economy is self-sufficient in that industry. A 1.0 would indicate the exact same proportion of that industry’s jobs to all Grey County jobs as to that of the benchmark, in this case, Canada. A location quotient of less than 0.75 usually indicates a lack of self-sufficiency, requiring an importation of goods or services, as there is insufficient local employment to produce the required goods/services. A location quotient of greater than 1.25 usually indicates the industry has more local employment than is required to sustain the needs of Grey County; therefore, it will export its goods or services and bring money into the community.

5.2.1 Location Quotients Analysis by Sector

The next figure illustrates the location quotients for Grey County by employment sector compared to Ontario and Canada as benchmarks.

Figure 17: Location Quotients by Employment Sectors, Grey County, 2014



Source: Employees & Self-Employed - EMSI 2014.1

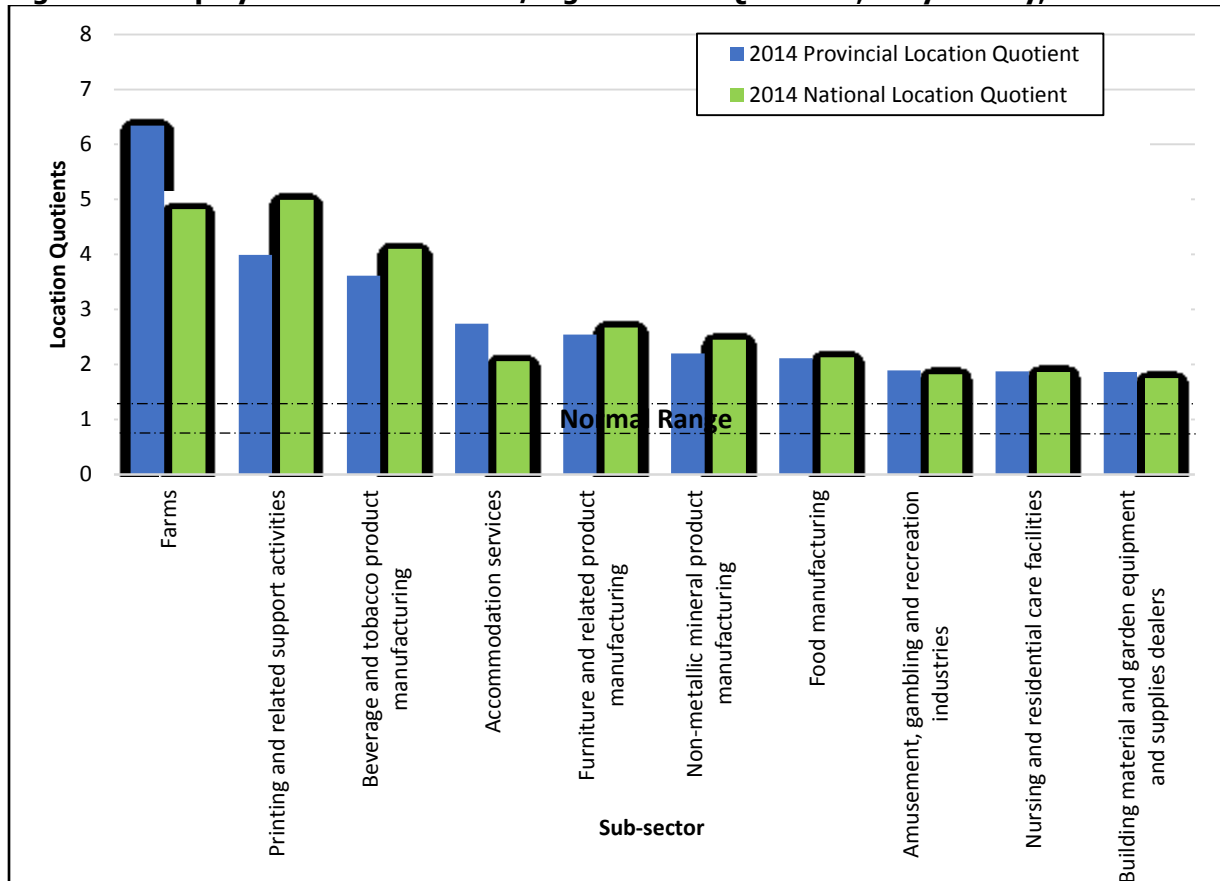
Sector location quotients for Grey County vary when compared to Ontario and Canada, however most sectors are below the average. Employment in the Agriculture, forestry, fishing and hunting sector is the most highly concentrated sector in Grey County in 2014. Compared to Ontario and Canada, employment sectors in Grey County which also had a higher than normal concentration were:

- Manufacturing
- Health care and social assistance
- Arts, entertainment and recreation
- Accommodation and food services.

5.2.2 Dominant Sub-Sectors

The following figure illustrates the sub-sectors that have a significant concentration in Grey County (Top 10 2014 provincial location quotient with 0.5% percentage of jobs).

Figure 18: Employment Sub-sectors w/High Location Quotients, Grey County, 2014



Source: Employees & Self-Employed - EMSI 2014.1

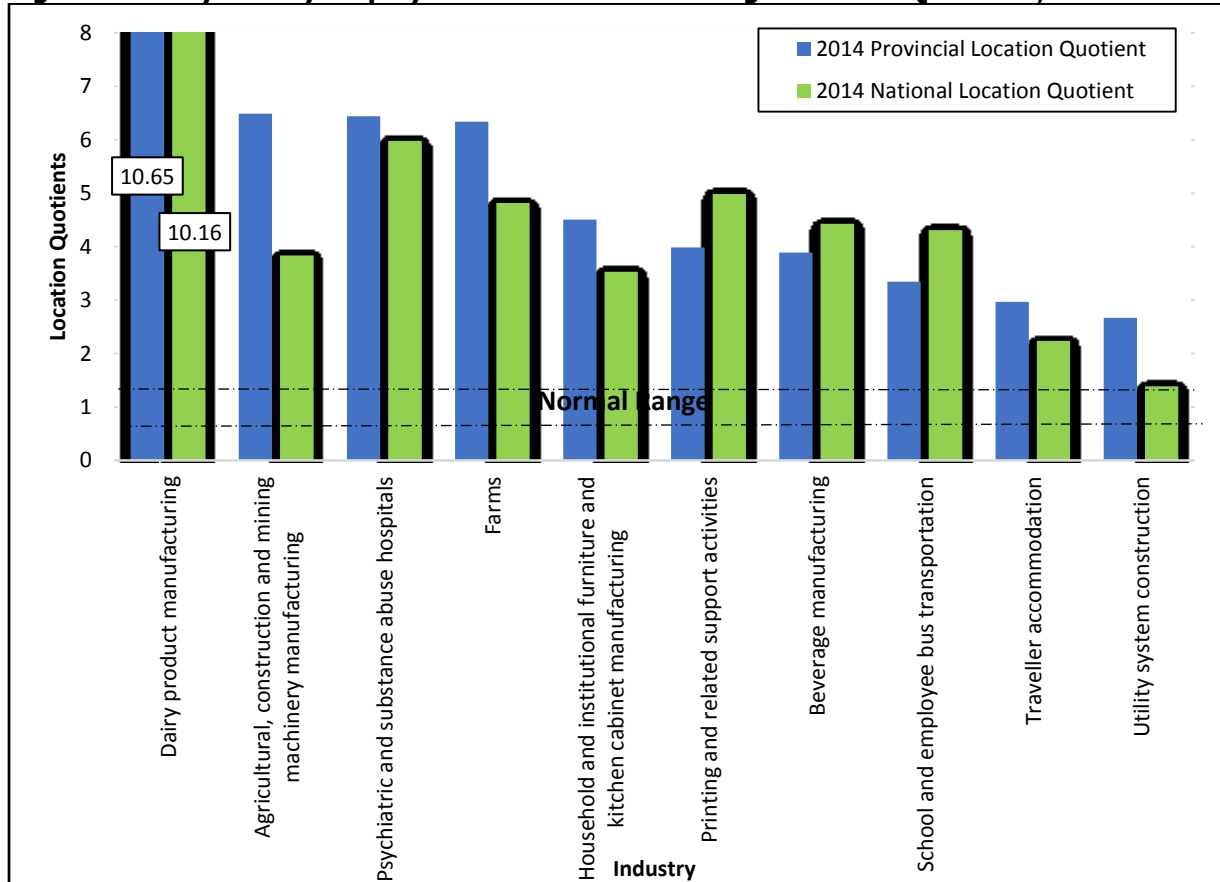
In terms of jobs at the sub-sector level, the Farms sub-sector dominates employment levels. Other sub-sectors with high concentrations compared to Ontario and Canada are as follows:

- Printing and related support activities
- Beverage and tobacco product manufacturing
- Accommodation services.

5.2.3 Location Quotients Analysis by Industry Level

The figure below demonstrates the employment figures by industries that a significant concentration in Grey County (Top 10 provincial location quotient with 0.5% percentage of jobs).

Figure 19: Grey County Employment Industries with High Location Quotients, 2014



Source: Employees & Self-Employed - EMSI 2014.1

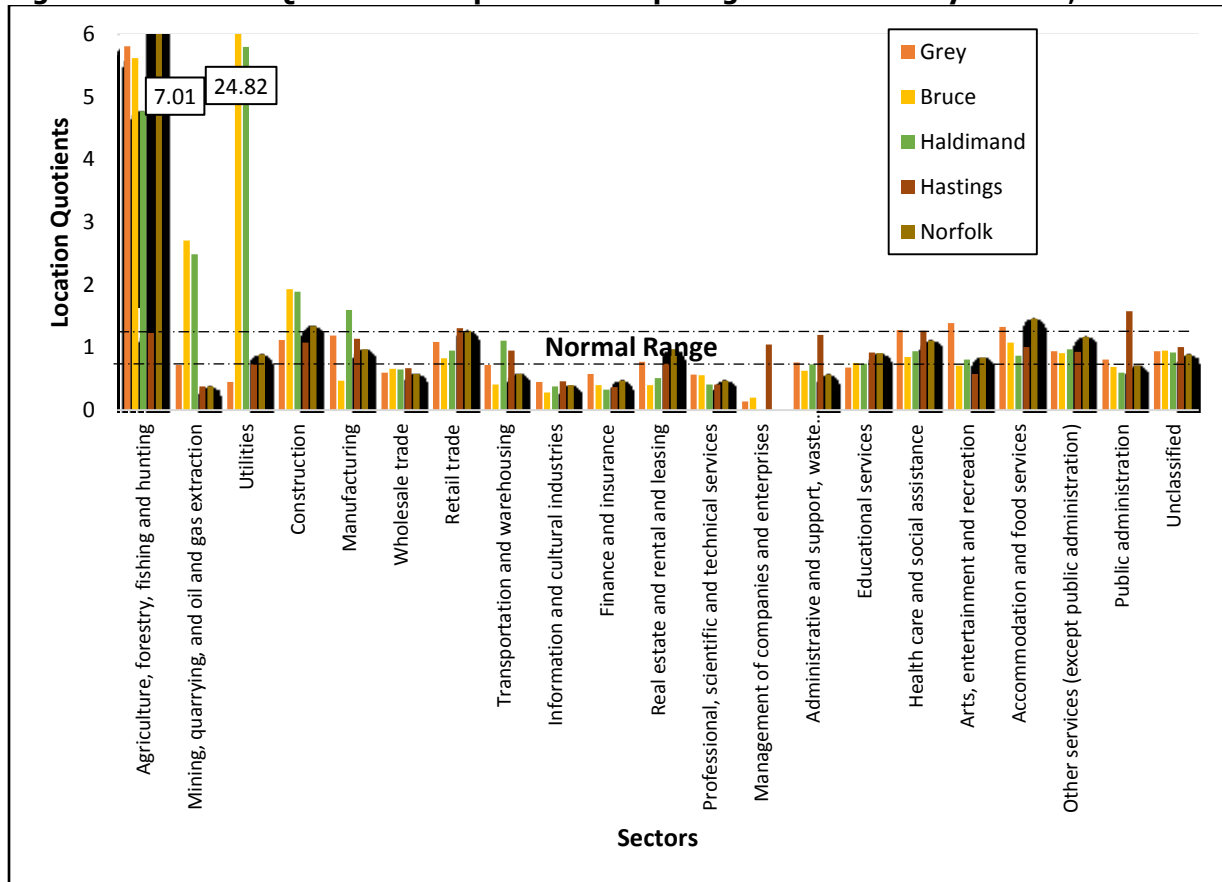
In terms of employment at the industry level, the following industries have very high concentrations:

- Dairy product manufacturing
- Agricultural, construction and mining machinery manufacturing
- Psychiatric and substance abuse hospitals
- Farms
- Household and institutional furniture and kitchen cabinet manufacturing.

5.2.4 Location Quotients Compared to Competing Communities

The next figure presents the 2014 Provincial location quotients by employment sectors for Grey County in comparison to Bruce, Haldimand, Hastings and Norfolk. This analysis points out differences in employment concentrations of Grey County in comparison to the competing communities.

Figure 20: Location Quotients Compared to Competing Communities by Sectors, 2014



Source: McSweeney & Associates from Employees & Self-Employed - EMSI 2014.1

In comparison to the competing communities, employment in most sectors is less concentrated in Grey County. Grey shows strong LQ scores in Agriculture, forestry, fishing and hunting but so do its competition. Employment in the Health care and social assistance sector, Manufacturing sector, Arts, entertainment and recreation sector and Accommodation and food services sector were more highly concentrated than their competitors.

An examination of the comparison of Grey County's employment structure to the competing communities at the more detailed level, or sub-sector level, follows. The following table illustrates the sub-sectors that have a significant number of jobs (percentage of jobs exceeding 0.5%) and also having a significant concentration in Grey County and competing communities compared to Canada as the benchmark (location quotient exceeding 1.5 to Canada). Compared with competing communities, Grey County had strength in the following concentrated employment sub-sectors:

- Printing and related support activities
- Beverage and tobacco product manufacturing
- Furniture and related product manufacturing
- Food manufacturing
- Amusement, gambling and recreation industries.

Table 7: Employment Sub-sectors with High LQ, Grey County vs. Competing Communities, 2014

Grey	Bruce	Haldimand	Hastings	Norfolk County
<ul style="list-style-type: none"> •Farms •Printing and related support activities •Beverage and tobacco product manufacturing •Accommodation services •Furniture and related product manufacturing •Non-metallic mineral product manufacturing •Food manufacturing •Amusement, gambling and recreation industries •Nursing and residential care facilities •Building material and garden equipment and supplies dealers 	<ul style="list-style-type: none"> •Utilities •Farms •Heavy and civil engineering construction •Mining and quarrying (except oil and gas) •Aboriginal public administration •Electrical equipment, appliance and component manufacturing •Accommodation services •Specialty trade contractors •Building material and garden equipment and supplies dealers •Miscellaneous merchant wholesalers 	<ul style="list-style-type: none"> •Petroleum and coal product manufacturing •Primary metal manufacturing •Utilities •Farms •Non-metallic mineral product manufacturing •Truck transportation •Wood product manufacturing •Construction of buildings •Postal service •Rental and leasing services 	<ul style="list-style-type: none"> •Electrical equipment, appliance and component manufacturing •Federal government public administration •General merchandise stores •Primary metal manufacturing •Paper manufacturing •Non-store retailers •Miscellaneous manufacturing •Nursing and residential care facilities •Motor vehicle and parts dealers •Building material and garden equipment and supplies dealers 	<ul style="list-style-type: none"> •Farms •Waste management and remediation services •Gasoline stations •Health and personal care stores •Personal and laundry services •Non-store retailers •Nursing and residential care facilities •Repair and maintenance •Specialty trade contractors •General merchandise stores

Source: McSweeney & Associates from Employees & Self-Employed - EMSI 2014.1

5.3 Shift-Share Analysis

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

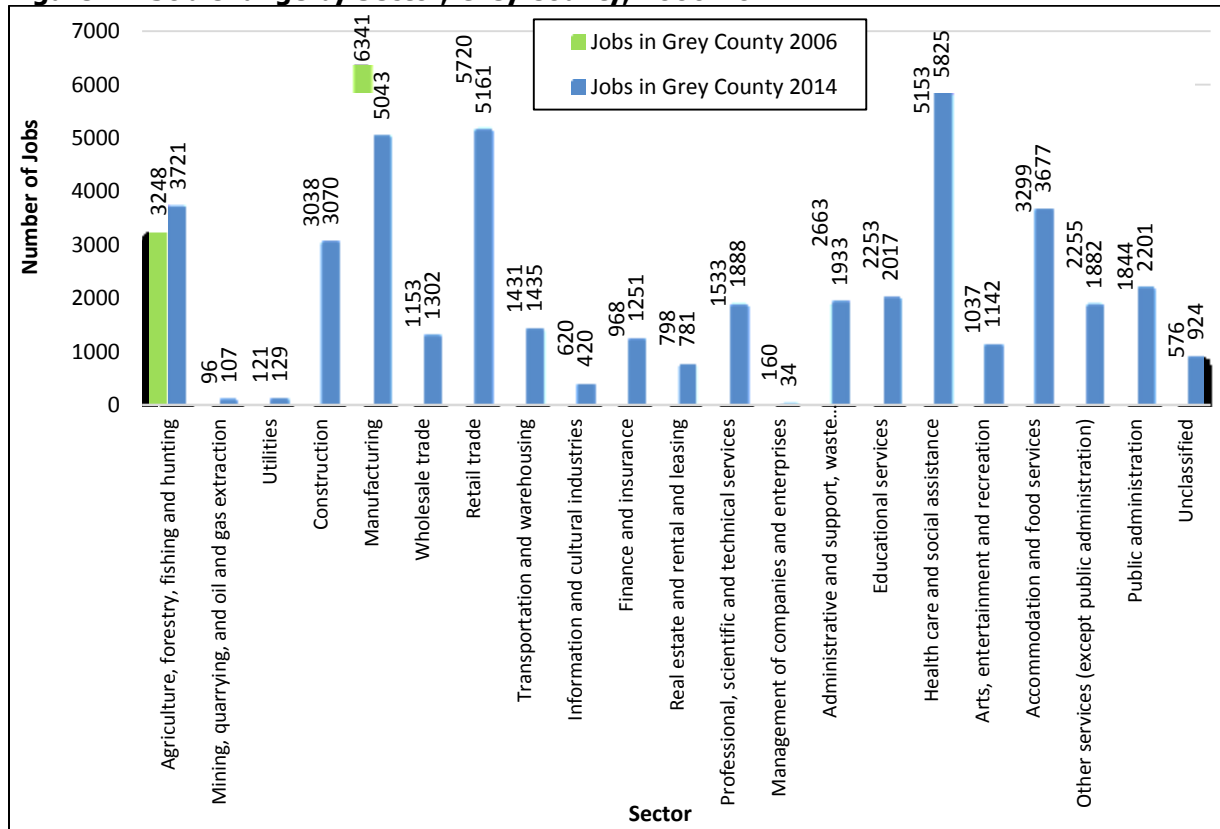
- Canadian economic growth: regional job growth/decline that is attributable to the growth, stability, or decline of the entire Canadian economy.
- Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that particular economic activity in the Canadian economy (with the economic growth component removed).
- Regional economic growth: regional job growth/decline that is attributable to the regional 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 all NAICS Industry Sectors using place of work statistics. Shift-share analysis allows the examination of changes through time (trends) versus the static snapshot of location quotients. To begin, the change in absolute job numbers between 2006 and 2014 by sector will be examined.

The following chart illustrates changes in job numbers by sector in Grey County between 2006 and 2014.

The following figure points out that the largest number increase in jobs between 2006 and 2014 was in the Health care and social assistance sector (increased from 5,153 to 5,825 jobs). The largest decline in jobs was in the manufacturing sector, which decreased from 6,341 in 2006 to 5,043 in 2014.

Figure 21: Job Change by Sector, Grey County, 2006-2014



Source: Employees & Self-Employed - EMSI 2014.1.

Table 8: Shift Share Analysis for Jobs by Sector, Grey County, 2006-2014

Sectors (NAICS classification)	Growth / Decline	% Growth / Decline	Canada % Growth / Decline	National Economic Effect	Industry Growth Effect	Regional / Local Effect
Agriculture, forestry, fishing and hunting	473	14.56%	-13.95%	283	-737	926
Mining, quarrying, and oil and gas extraction	11	11.5%	24.2%	8	15	-12
Utilities	8	6.6%	3.1%	11	-7	4
Construction	32	1.1%	24.7%	265	486	-719
Manufacturing	-1,298	-20.5%	-18.7%	553	-1738	-113
Wholesale trade	149	12.9%	2.8%	101	-68	117
Retail trade	-559	-9.8%	4.7%	499	-231	-827
Transportation and warehousing	4	0.3%	8.6%	125	-2	-119
Information and cultural industries	-200	-32.3%	3.9%	54	-30	-224
Finance and insurance	283	29.2%	14.9%	84	59	139
Real estate and rental and leasing	-17	-2.1%	12.1%	70	27	-114
Professional, scientific and technical services	355	23.2%	17.6%	134	137	84
Management of companies and enterprises	-126	-78.8%	5.0%	14	-6	-134
Administrative and support, waste management and remediation services	-730	-27.4%	5.6%	232	-83	-879
Educational services	-236	-10.5%	12.0%	197	75	-507
Health care and social assistance	672	13.0%	19.9%	450	575	-353
Arts, entertainment and recreation	105	10.1%	9.9%	91	12	2
Accommodation and food services	378	11.5%	14.8%	288	199	-109
Other services (except public administration)	-373	-16.5%	7.6%	197	-26	-544
Public administration	357	19.4%	10.1%	161	25	171
Unclassified	348	60.4%	80.8%	50	415	-117

Source: Employees & Self-Employed - EMSI 2014.1.

The shift-share analysis table above explains 2006-2014 job growth in Grey County for each industry sector by attributing absolute changes in job numbers to national, industry and regional growth effects.

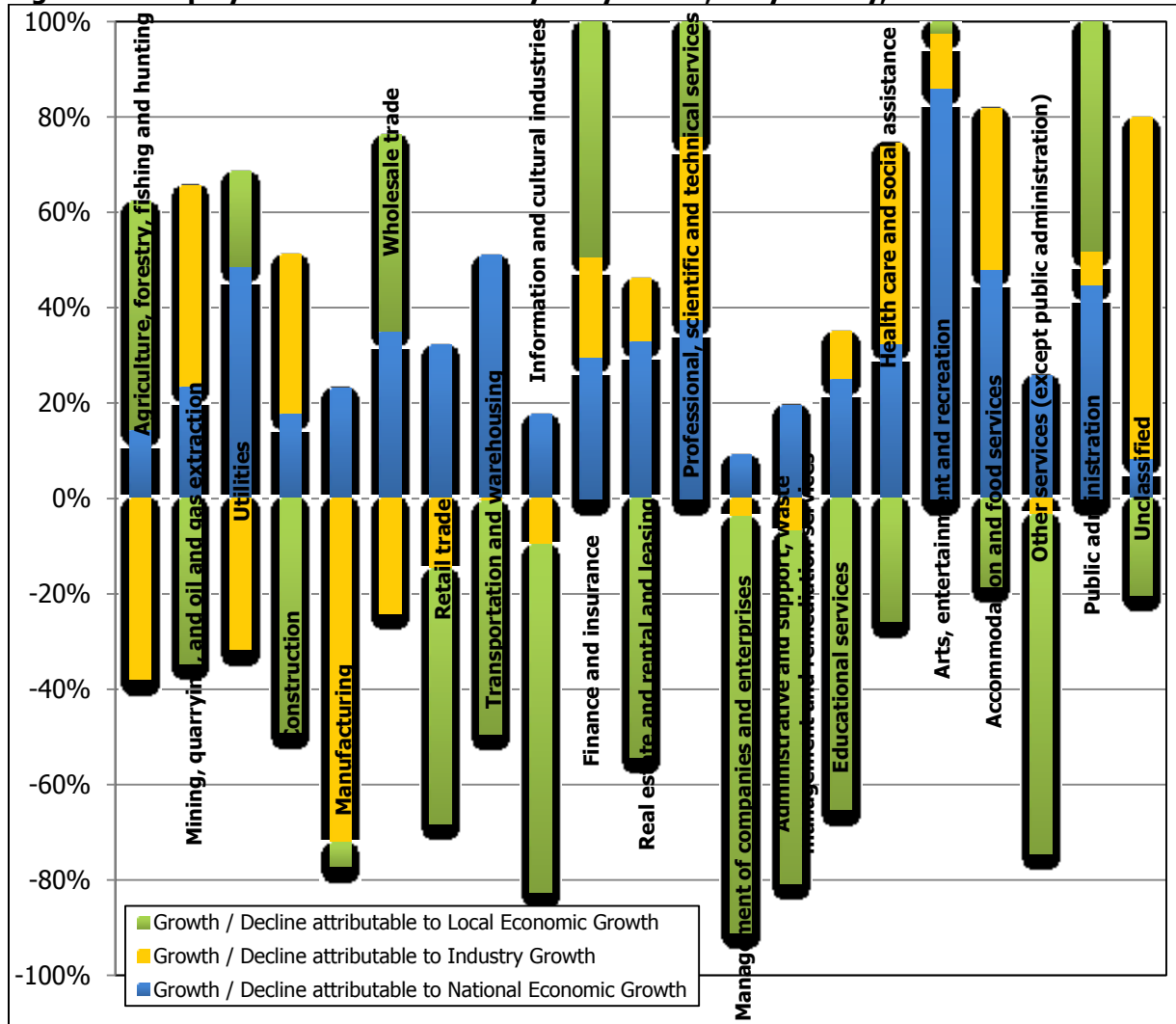
An example of how to interpret the table follows:

- The health care and social assistance sector experienced an increase of 672 jobs between 2006 and 2014. This increase may be attributed to the following:
 - Overall job growth in the national economy would have resulted in the growth of 450 jobs;
 - Jobs in the health care and social assistance industry in Canada increased, therefore 575 job changes could be expected due to industry job effect;
 - The total health care and social assistance job increased in Grey County was 672, of which 450 can be attributed to the national economic growth and 575 job change can be attributed in the industry effect, therefore the local effect was a decline of 353 jobs.
- With a loss of 1,298 jobs, the manufacturing sector experienced the largest decrease between 2006 and 2014. This loss may be attributed as follows:

- Overall job growth in the national economy would have resulted in a growth of 553 manufacturing jobs;
- Jobs in the manufacturing services industry in Canada decreased during this period, therefore an decrease of 1,738 jobs could be expected due to industry job decline;
- Since a total loss of 1298 jobs can be attributed to the industry decline (-1,738) and a growth of the national economy (553), the local effect was a loss of 113 jobs for a total loss in Grey County.

The following figure graphically depicts the preceding table for Grey County:

Figure 22: Employment Shift-Share Analysis by Sector, Grey County, 2006-2014



Source: Employees & Self-Employed - EMSI 2014.1.

The shift-share analysis reveals the following:

- The following sectors were growing at a more rapid rate than can be explained by national and industry growth combined, and were an area of strength in Grey County between 2006 and 2014.

- Agriculture, forestry, fishing and hunting
 - Utilities
 - Wholesale trade
 - Professional, scientific and technical services
 - Arts, entertainment and recreation
 - Finance and insurance
 - Public administration.
- Employment in the following sectors in Grey County suffered local weakness between 2006 and 2014 after considering both national and industry growth:
 - Administrative/Waste management/Remediation Services
 - Mining, quarrying, and oil and gas extraction
 - Management of companies and enterprises
 - Retail trade
 - Information and cultural industries
 - Real estate and rental and leasing
 - Educational services
 - Health care and social assistance
 - Construction
 - Manufacturing
 - Transportation and warehousing
 - Accommodation and food services
 - Other services (except public administration).

6 Comparative Analysis

Using a variety of data and information sources, a competitive analysis was undertaken, comparing Grey County and nearby competing Counties. For the purpose of this exercise, the target competitors of Bruce County, Haldimand County, Hastings County and Norfolk County were selected. The findings will help identify relative advantages Grey enjoys through the lens of investment attraction and site selection.

In 2014, total tax rates vary throughout communities within Grey County but overall, the County's tax rates appear to be on par with its competition. The average of commercial and industrial tax rates in Grey County (except Owen Sound) are roughly the same as the Bruce County average but slightly lower than Haldimand County and Norfolk County. The commercial and industrial tax rates in Owen Sound are higher than Bruce County average, Haldimand County, Hastings County average and Norfolk County. Hastings County's average commercial and industrial tax rates are the lowest amount the competitive communities.

The population and labour force in Grey County are smaller than Hastings County but larger than all the other three Counties compared. Grey's participation, employment and unemployment rates fall near the mid-point compared to the other communities. On average, housing costs in Grey County are higher than all their competitors. Wage rates and income levels for Grey County are around the mid-point, relative to its competitors while the cost of labour in Haldimand County and Norfolk County are lower than Grey County.

All the communities have electricity and gas services. All comparable Counties, with the exception of Haldimand County, receive service from Hydro One and Union Gas, depending on the county and the community. Haldimand County Utilities Inc. (which supplies Haldimand County) rates are slightly lower than Hydro One.

Looking at post-secondary institutes, Grey County has the Career & Business College, Georgian College and Creative Career Systems (CCS). In addition, there are several universities within acceptable commuting distance. Haldimand County and Norfolk County are closer in proximity to larger numbers of major universities.

Grey County does not show a competitive advantage with regards to broadband connectivity. Like its competitors, the County is served by several different internet and cell phone companies, depending on the community. Grey County does not have railway access. It is more accessible through airports in Owen Sound and in Toronto. In terms of access to major market and highways, Grey County does not show a competitive strength.

7 Business Pattern Data

The total number of businesses in Grey County increased 17.7% (13.6% in ON) from 6,719 June 2009 to 7,908 in December 2013. (Tables 22 and 23 in the Appendix)

In December 2013, the Agriculture, Forestry, Fishing and Hunting sector had the largest number of businesses (1,231 businesses which is 15.57% of total businesses) in Grey County. In addition, Grey County also had a larger percentage of total businesses in the following sectors:

- Construction (1,065 businesses, 13.47% of total)
- Retail Trade (804 businesses, 10.17% of total)
- Real Estate and Rental and Leasing (773 businesses, 9.77% of total)
- Professional, Scientific and Technical Services (686 businesses, 8.67% of total).

From June 2009 to December 2013, Grey County had a large percentage increase of businesses establishments in the following sectors:

- Agriculture, Forestry, Fishing and Hunting (26.6% vs. 16.5% in ON)
- Manufacturing (17.1% vs. -1.0% in ON)
- Real Estate and Rental and Leasing (64.5% vs. 45.8%)
- Mining, Quarring, and Oil and Gas Extraction (166.7% vs. 28% in ON)
- Utilities (136.4% vs. 49.1% in ON)
- Health Care and Social Assistance (32% vs. 48.1% in ON)
- Professional, Scientific and Technical Services (25.9% vs. 14.3% in ON).

The top 5 sub-sectors with high percentage of businesses establishments in Grey County in December 2013 were:

- Farms (1,169 businesses, 14.78% of total)
- Real estate (744 businesses, 9.41% of total)
- Professional, scientific and technical services (686 businesses, 8.67% of total)
- Specialty trade contractors (657 businesses, 8.31% of total)
- Construction of buildings (335 businesses, 4.24% of total).

During the same period (June 2009 to December 2013), Grey County had a greater increase with a larger number of businesses in the following sub-sector:

- Food and beverage stores (42.39% vs. 3.92% in ON)
- Real estate (72.2% vs. 50.8% in ON)
- Professional, scientific and technical services (25.87% vs. 14.28% in ON)
- Construction of buildings (22.71% vs. 20.37% in ON)
- Ambulatory health care services (36.6% vs. 51.22% in ON)
- Religious, grant-making, civic, and professional and similar organizations (28.11% vs. 23.31% in ON).

8 Agriculture Highlights¹⁶

8.1 Major Crops

In 2011, Grey County had the following major fruit, hay and field crops (higher percentages of Ontario's total crops in hectares than Bruce County, Haldimand County, Hastings County and Norfolk County):

- Barley (12.41% of Ontario's total)
- Oats (4.47% of Ontario's total)
- Mixed grains (14.62% of Ontario's total)
- Canola (rapeseed) (12.53% of Ontario's total)
- Flaxseed (10.72% of Ontario's total)
- Alfalfa and alfalfa mixtures (7.70% of Ontario's total)
- All other tame hay and fodder crops (4.62% of Ontario's total)
- Apple (22.51% of Ontario's total).

The total vegetable crops in Grey County is only 0.25% of Ontario's total vegetable crops, of which sweet corn is the major vegetable crops in Grey County (only 0.4% of Ontario's total).

8.2 Major Livestock and Poultry

In 2011 Grey County had the following major livestock and poultry (higher percentages of Ontario's total number than Bruce County, Haldimand County, Hastings County and Norfolk County):

- Beef Cows (8.41% of Ontario's total)
- Bulls 1 year and over (7.69% of Ontario's total)
- Total sheep and lambs¹⁷ (7.14% of Ontario's total)
 - Rams (7.94% of Ontario's total)
 - Ewes (7.47% of Ontario's total)
 - Lambs (6.70% of Ontario's total)
- Horses and ponies (5.20% of Ontario's total)
- Rabbits¹⁸ (14.15% of Ontario's total)
- Turkeys¹⁹ (3.23% of Ontario's total).

8.3 Total Gross Farm Receipts

¹⁶ Please check tables 24 to 33 for the Agriculture Highlights.

¹⁷ Total sheep and lambs. "Total sheep and lambs" includes "Rams," "Ewes" and "Lambs."

¹⁸ Rabbits. New for 2011; therefore comparison with 2006 is not possible.

¹⁹ Turkeys. Turkey inventories reflect the total number of birds on Census Day and should be used with caution. Poultry inventories will fluctuate because barns that were empty on Census Day had no inventories to report. Users are advised to use the annual production data as a more accurate reflection of changes in these agricultural sectors over time.

In 2010, total gross farm receipts (excluding forest products sold) was \$288,295,498 (2.42% of Ontario's total receipts).

Over 50% reported farms in Grey County had gross farm receipts under \$25,000 in 2010 (11.32% of Ontario's total which was greater than that of Bruce County, Haldimand County, Hastings County and Norfolk County).

8.4 Grey County Agriculture Trends: 2006-2011

8.4.1 Major Crops Trends

From 2006 to 2011, Grey County had a large percentage increase in the following major crops:

- Total wheat²⁰ (41.80% vs. -1.46% in ON)
 - Winter wheat (74.91% vs. 6.95% in ON)
- Flaxseed (17.27% vs. -30.18% in ON)
- Canola (rapeseed) (1150% vs. 375.25% in ON)
- Total vegetables (excluding greenhouse vegetables) (3.96% vs. -16.71% in ON).

During the same period, Grey County experienced a big decline in the following major crops:

- Oats (-41.20% vs. -46.16% in ON)
- Barley (-29.82% vs. -42.60% in ON)
- Mixed grains (-41.98% vs. -38.80% in ON)
- Alfalfa and alfalfa mixtures (-23.63% vs. -19.02 in ON)
- Apples (-17.13% vs. -21.51% in ON).

8.4.2 Major Livestock and Poultry Trends

Most of the major livestock declined from 2006 to 2011 in Grey County:

- Beef cows (-27.75% vs. -25.25% in ON)
- Bulls, 1 year and over (-5.74% vs. -9.94% in ON)
- Total sheep and lambs²¹ (-36.45% vs. 13.38% in ON)
 - Lambs (-57.67% vs. 9.74% in ON)
- Horses and ponies (-19.25% vs. -10.94% in ON).

From 2006 to 2011, Grey County had a big increase in two livestock and poultry inventories - Goats (15.98% vs. 52.74% in ON) and Turkeys²² (7.60% vs. -2.03% in ON).

8.4.3 Total Gross Farm Receipts Trends

Total gross farm receipts increased from \$267,295,850 in 2005 to \$288,295,498 in 2010 (7.86% vs. 14.98% in ON).

²⁰ Total wheat. "Total wheat" includes "Spring wheat," "Durum wheat" and "Winter wheat."

²¹ Total sheep and lambs. "Total sheep and lambs" includes "Rams," "Ewes" and "Lambs."

²² Turkeys. Turkey inventories reflect the total number of birds on Census Day and should be used with caution. Poultry inventories will fluctuate because barns that were empty on Census Day had no inventories to report. Users are advised to use the annual production data as a more accurate reflection of changes in these agricultural sectors over time.

Total gross farm receipts under \$499,999 segment all declined from 2005 to 2010 in Grey County. However, the total gross farm above \$500,000 segment had a huge increase during the same period. Especially, the \$2,000,000 and over receipts segment increased 55.56% compared to 41.38% in ON.

9 Economic Development Trends Analysis

9.1 Site Selection Factors

In 2013, Annual Corporate Survey and the Consultants Survey were conducted to rate site selection factors and the impact these factors have on planning decisions.²³ Highlighted points of the survey are as follows:

- *Availability of skilled labour* jumped from 3rd last year to the most important site selection factor for this year.
- *Highway accessibility* and *Labour costs* are still the important factors in 2013.
- *State and local incentives* jumped from 13th to 8th.
- *Available land* rose from 13th from 18th.
- *Waterway or ocean port accessibility* remained at the bottom of the list.
- In 2012, *low crime rate*, which is historically ranked as the primary quality-of-life concern as borne out by the survey's 28-year record, received an 80% importance rating from the corporate survey. The consultants' survey ranked it 2nd.

The following two figures provide more detailed results of the 2013 Corporate Survey and Consultants Survey 2013.

²³ For more information about the survey please go to : <http://www.areadevelopment.com/Corporate-Consultants-Survey-Results/Q1-2014/28th-Corporate-Executive-RE-survey-results-6574981.shtml>

Figure 23: Site Selection Factors - Corporate Survey 2013

Area Development Combined Ratings* of 2013 Factors		
<i>Ranking - Site Selection Factors</i>	2013	2012
1. Availability of skilled labour	95.1	89.4 (3)**
2. Highway accessibility	93.5	90.1 (2)
3. Labour costs	90.8	90.8 (1)
4. Occupancy or construction costs	87.4	82.8 (5)
5. Availability of advanced ICT services	84.6	85.1 (4)
6. Available Buildings	83.8	78.4 (8)
7. Corporate tax rate	82.4	79.3 (7)
8. State and local incentives	81.9	71.1 (13)
9. Low union profile	81.4	73.5 (10)
10. Energy availability and costs	80.8	81.3 (6)
11. Tax exemptions	80.6	75.4 (9)
11T. Right-to-work state	80.6	72.6 (11)
13. Available land	80.3	59.0 (18)
14. Expedited or "fast-track" permitting	76.3	67.2 (15)
15. Proximity to major markets	75.6	72.2 (12)
16. Availability of long-term financing	74.8	63.1 (17)
17. Environmental regulations	71.7	71.1 (13T)
18. Inbound/outbound shipping costs	70.9	63.7 (16)
19. Proximity to suppliers	67.7	54.9 (19)
20. Raw materials availability	60.5	49.7 (23)
21. Accessibility to major airport	59.4	52.9 (21)
22. Proximity to technical college/training	54.1	50.3 (22)
23. Training programs	51.5	54.7 (20)
24. Availability of unskilled labour	48.9	42.9 (25)
25. Railroad service	29.4	43.6 (24)
26. Waterway or ocean port accessibility	20.2	19.9 (26)
<i>Ranking - Quality-of-life Factors</i>		
1. Low crime rate	80.9	79.3 (1)**
2. Healthcare facilities	79.7	69.8 (2)
3. Housing costs	75.3	66.9 (4)
4. Ratings of public schools	73.0	63.3 (5)
5. Housing availability	71.5	69.8 (2T)
6. Recreational opportunities	66.4	52.9 (8)
7. Colleges and universities in area	59.5	61.6 (6)
7T. Climate	59.5	55.0 (7)
8. Cultural opportunities	54.8	48.9 (9)
*All figures are percentages and are the total of "very important" and "important" ratings of the Area Development Corporate Survey and are rounded to the nearest tenth of a percent.		
** (2012 ranking)		

Source: Area Development Magazine Special Presentation (Q1 2014)

Figure 24: Consultants Survey 2013

Area Development Combined Ratings* of 2013 Factors		
<i>Ranking – Site Selection Factors</i>	2013	2012
1. Availability of skilled labour	98.3	96.5 (2)**
2. Highway accessibility	97.4	98.3 (1)
3. State and local incentives	93.8	91.1 (6)
4. Available land	93.0	86.6 (12)
5. Labor costs	92.9	93.0 (3)
5T. Proximity to major markets	92.9	92.9 (4)
7. Tax exemptions	91.9	90.3 (7)
8. Energy availability and costs	88.6	89.3 (9)
8T. Accessibility to major airport	88.6	83.6 (13)
10. Expected or “fast-track” permitting	87.7	92.8 (5)
11. Corporate tax rate	86.8	90.3 (7T)
12. Proximity to suppliers	86.7	80.9 (16)
13. Right-to-work state	86.0	75.9 (20)
14. Low union profile	85.9	89.2 (10)
15. Availability of advanced ICT services	85.0	81.9 (14)
16. Occupancy or construction costs	84.2	88.3 (11)
17. Environmental regulations	84.1	81.1 (15)
18. Available buildings	83.1	80.1 (17)
19. Inbound/outbound shipping costs	81.8	76.5 (19)
20. Training programs	79.0	77.4 (18)
21. Proximity to technical college/training	78.1	75.4 (21)
22. Raw materials availability	69.9	65.4 (22)
23. Availability of long-term financing	59.4	61.2 (23)
24. Availability of unskilled labour	53.1	49.0 (24)
25. Railroad service	50.0	44.7 (25)
26. Waterway or ocean port accessibility	39.3	32.1 (26)
<i>Ranking – Quality-of-life Factors</i>		
1. Colleges and universities	82.5	79.8 (1)
2. Low crime rate	78.0	78.4 (2)
3. Ratings of public schools	77.0	73.7 (3)
4. Housing costs	74.3	52.7 (7)
5. Healthcare facilities	70.2	69.3 (4)
6. Housing availability	68.4	57.5 (5)
7. Climate	61.4	51.8 (8)
8. Cultural opportunities	51.7	43.8 (9)
9. Recreational opportunities	49.5	54.3 (6)
*All figures are percentages and are the total of “very important” and “important” ratings of the Area Development Corporate Survey and are rounded to the nearest tenth of a percent.		
** (2012 ranking)		

Source: Area Development Magazine Special Presentation (Q1 2014)

10 Economic Forecast

Table 34 and 35 in Appendix A provide the major economic indicators outlook for Canada and Ontario. The following forecast can be observed²⁴:

Canada

- Canada's real GDP is expected to have a 2.0% to 2.5% increase in 2014; picking up between 2.5% to 2.7% in 2015.
- Canadian employers report conservative hiring plans for Quarter 3 2014, with a net employment outlook increase of 16%. Employment is forecasted to increase between 0.7% to 1.1% in 2014 and 1.0% to 1.2% in 2015. The unemployment rate is expected to be between 6.8% and 7.0% in 2014 and to be between 6.6% and 6.7% in 2015.
- The inflation is expected climb and the Consumer Price Index is forecasted to increase to the range of 1.4 to 2.1 in 2014 and 1.8 to 2.0 in 2015.

Ontario

- Ontario's economic growth has not performed well over the past two years, however, in 2014 the outlook is expected to improve. Overall, Ontario's real GDP growth rate is estimated to be 2.0% to 2.5% in 2014 and 2.4% to 2.9% in 2015.
- Employment growth rate is projected to decline to the between 0.6% and 0.9% in 2014 and 1.0% to 1.3% in 2015. Unemployment rate is expected to fall to between 7.3% and 7.4% in 2014 and 7.0% to 7.1% in 2015.
- Housing starts performed poorly last year but are expected to increase 2.2% in 2014. The long-run forecast is less positive and is expected to decline 10.7% in 2015.

Industrial Outlook

Tables 36 to 38 in Appendix A provide the Industrial Outlook for Canada and Ontario. The following can be observed:

- With a Net Employment Outlook of +10% in Canada and +8% in Ontario, nine of the ten industry sectors are expected to gain jobs from July to September. Transportation & Public Utilities sector employers report the most optimistic hiring plans with an Outlook of +20%. The Public administration sector and Manufacturing-Non-Durables are all expected to have a positive outlooks of 17% growth. Education sector's forecast is a little lower, with an 11% increase. Only the Mining sector is forecast to decline at -3%.
- EDC Economics forecasts that Canadian exports of goods and services are projected to rise 6% this year and next. This is due to a significant boost from a weak Canadian dollar as well as projected US economic growth in 2015, allowing more US consumers to purchase Canadian goods. The forestry sector is expected to be a top performing sector with an export increase of 27%, growing to nearly \$1.2 million in 2014 and \$1.4 million in 2015. Canada's agriculture exports will also outperform expectations, rising 11% in 2013. Energy sector exports are projected to increase 7% in 2014. The industrial machinery and equipment sector is projected to increase by 7% in 2014, accelerating to 13% in 2015. Canadian automotive exports will climb by a modest 3% in 2014 increasing to 4% in 2015.
- Manufacturing shipments rebounded in late 2013 and display a positive outlook for 2014. Wood product shipments jumped in most regions last year, with further gains

²⁴ References and sources can be found at the end of this section.

expected in 2014. Food manufacturing was up more than 8% in Ontario and Saskatchewan in 2013, pushing shipments higher nationwide. In Ontario, motor vehicle & parts shipments dropped 3% in 2013, but they should rebound in 2014, given the rising North American auto sales and higher output from plants that underwent re-tooling last year.

- Both goods-producing and service sectors are forecasted to expand at just over 2% in 2014. The Agricultural sector and Construction sector are expected to decline in 2015 and the Goods-producing sector should accelerate to 3.3%.
- The Service sectors are still outperforming expectations and are projected to have a 2.4% increase in 2014 and a 2.2% increase in 2015. This is due to growing foreign demand and improved performances in the sectors of Accommodation and food services, Wholesale trade and Transportation and warehousing sectors.

References:

1. The Conference Board of Canada, *Provincial Outlook - Spring 2014*
2. TD Economics, *Quarterly Economic Forecast* – June 23, 2014
3. RBC Economic Research, *Provincial Outlook* – March, 2014
4. Manpower, *Employment Outlook Survey* – Q3/2014
5. TD Economics, *Industrial Outlook* – April 25, 2014
6. EDC Economics, *Export Forecast Overview* – Spring 2014
7. The Annual Corporate Survey & Annual Consultants Survey – 2013
8. TD Economics, : Canadian manufacturing, August 15, 2014
9. TD Economics, *Long Term Economic Forecast, June 23, 2014*
10. Scotiabank Group, *Provincial Flash* – Feb. 14, 2014
11. TD Economics, *Provincial Economic Forecast*, July 8, 2014

Appendix A: Data Tables

Table 9: Percentage Population by Age, Grey County, 2006, 2011 & 2014

	Grey County 2006	Grey County 2011	Grey County 2014
Total population by sex and age groups - 100% Data	92,410	92,565	95,047
Population age 0-4	4.6	4.6	4.2
Population age 5-9	5.4	4.8	4.8
Population age 10-14	6.5	5.6	5.1
Population age 15-19	7.1	6.4	6.0
Population age 20-24	5.6	5.6	6.2
Population age 25-29	4.4	4.6	5.2
Population age 30-34	4.5	4.5	4.7
Population age 35-39	5.5	4.8	4.7
Population age 40-44	7.2	5.7	5.2
Population age 45-49	8.3	7.6	6.3
Population age 50-54	7.9	8.4	8.1
Population age 55-59	7.8	8.2	8.4
Population age 60-64	6.5	8.1	7.9
Population age 65-69	5.3	6.4	7.3
Population age 70-74	4.6	4.9	5.4
Population age 75-79	3.9	4.0	4.1
Population age 80-84	2.5	3.1	3.2
Population age 85+	2.3	2.7	3.2

Source: McSweeney & Associates from Statistics Canada Census data 2006, 2011 and Manifold Data Mining Inc. Superdemographics 2014.

Table 10: Percentage Population by Age, Grey County vs. Ontario, 2014

	Grey County	Grey County %	Ontario %
Total population	95,047		13,622,941
Population age 0-4	4,025	4.2	5.3
Population age 5-9	4,533	4.8	5.5
Population age 10-14	4,884	5.1	5.6
Population age 15-19	5,680	6.0	6.2
Population age 20-24	5,910	6.2	6.8
Population age 25-29	4,924	5.2	6.3
Population age 30-34	4,433	4.7	6.3
Population age 35-39	4,424	4.7	6.3
Population age 40-44	4,941	5.2	6.8
Population age 45-49	5,991	6.3	7.4
Population age 50-54	7,700	8.1	8.1
Population age 55-59	7,965	8.4	7.3
Population age 60-64	7,513	7.9	6.1
Population age 65-69	6,917	7.3	5.2
Population age 70-74	5,168	5.4	3.8
Population age 75-79	3,907	4.1	2.9
Population age 80-84	3,086	3.2	2.2
Population age 85+	3,047	3.2	2.1

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

Table 11: Income Levels with % Change, Grey County vs. Ontario, 2010 & 2013

	Grey County 2010 %	Grey County 2013 %	ON 2013 %
Income of population 15 years and over	76,340	81,607	11,106,547
Without income	3.8	3.8	4.7
With income	96.2	96.2	95.3
Under \$5,000	8.5	8.2	4.0
\$5,000 to \$9,999	7.2	7.4	3.3
\$10,000 to \$14,999	8.6	8.5	3.1
\$15,000 to \$19,999	9.7	9.9	3.3
\$20,000 to \$29,999	16.3	15.7	5.4
\$30,000 to \$39,999	12.3	12.4	3.9
\$40,000 to \$49,999	10.9	10.9	5.6
\$50,000 to \$59,999	7.2	7.8	8.4
\$60,000 to \$79,999	7.7	7.3	7.0
\$80,000 to \$99,999	4.1	4.3	6.2
\$100,000 and over	3.7	4.0	6.3
\$100,000 to \$124,999	1.7	2.1	5.7
\$125,000 and over	2.0	1.9	5.0

Source: McSweeney & Associates from Statistics Canada Census data 2011 (2010 incomes) and Manifold Data Mining Inc. Superdemographics 2014 (2013 incomes).

Table 12: Total Income Levels, Grey County vs. Ontario, 2013

	Grey County	Grey County %	Ontario %
Income of population 15 years and over	81,607		11,393,642
Without income	3,125	3.8	5.3
With income	78,482	96.2	94.7
Under \$5,000	6,657	8.2	10.0
\$5,000 to \$9,999	6,026	7.4	7.0
\$10,000 to \$14,999	6,915	8.5	8.2
\$15,000 to \$19,999	8,067	9.9	8.5
\$20,000 to \$29,999	12,781	15.7	12.7
\$30,000 to \$39,999	10,119	12.4	10.9
\$40,000 to \$49,999	8,886	10.9	9.4
\$50,000 to \$59,999	6,346	7.8	7.3
\$60,000 to \$79,999	5,942	7.3	9.0
\$80,000 to \$99,999	3,515	4.3	5.6
\$100,000 and over	3,229	4.0	6.2
\$100,000 to \$124,999	1,698	2.1	3.0
\$125,000 and over	1,531	1.9	3.2
Median income (\$) of total population 15 years and over	29,845		31,800
Average income (\$) of total population 15 years and over	38,938		44,752

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014 (2013 incomes).

Table 13: Family Income Levels, Grey County vs. Ontario, 2013

	Grey County	Ontario %
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Family income of economic families	27,331	3,539,208
Median family income (\$)	74,224	85,523
Average family income (\$)	88,363	106,951

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014 (2013 incomes).

Table 14: Household Income Levels, Grey County vs. Ontario, 2013

	Grey County	Grey County %	Ontario %
Household total income of private households.	39,552		5,231,222
Under \$5,000	799	2.0	2.4
\$5,000 to \$9,999	620	1.6	1.9
\$10,000 to \$14,999	1,092	2.8	3.0
\$15,000 to \$19,999	1,990	5.0	4.5
\$20,000 to \$29,999	3,810	9.6	7.7
\$30,000 to \$39,999	4,265	10.8	8.5
\$40,000 to \$49,999	4,221	10.7	8.8
\$50,000 to \$59,999	4,211	10.6	8.9
\$60,000 to \$79,999	5,634	14.2	13.1
\$80,000 to \$99,999	5,060	12.8	11.7
\$100,000 to \$124,999	3,722	9.4	10.8
\$125,000 to \$149,999	1,482	4	7
\$150,000 and over	2,648	7	11
Median household total income (\$)	60,012		68,967
Average household total income (\$)	75,102		90,520

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014 (2013 incomes).

Table 15: Education Attainment, Grey County vs. Ontario, 2014

	Grey County	Grey County %	Ontario %
Total population aged 25 to 64 years by highest certificate; diploma or degree	47,892		7,427,242
No certificate; diploma or degree	7,064	14.7	11.0
High school diploma or equivalent	14,320	29.9	24.2
Postsecondary certificate; diploma or degree	26,508	55.3	64.9
Apprenticeship or trades certificate or diploma	5,368	11.2	7.7
College; CEGEP or other non-university certificate or diploma	12,397	25.9	23.5
University certificate or diploma below bachelor level	1,292	2.7	4.6
University certificate; diploma or degree at bachelor level or above	7,451	15.6	29.1
Bachelor's degree	4,783	10.0	17.8
University certificate; diploma or degree above bachelor level	2,668	5.6	11.2

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

Table 16: Post-secondary Qualifications by Major Field of Study, Grey County vs. Ontario, 2014

	Grey County	Grey County %	Ontario %
Total population aged 15 years and over by major field of study	81,607		11,393,642
No postsecondary certificate, diploma or degree	42,242	51.8	45.4
Education	3,752	4.6	3.7
Visual and performing arts, and communications technologies	1,534	1.9	2.1
Humanities	1,874	2.3	3.3
Social and behavioural sciences and law	3,385	4.1	6.5
Business, management and public administration	6,873	8.4	11.7
Physical and life sciences and technologies	755	0.9	2.2
Mathematics, computer and information sciences	765	0.9	2.6
Architecture, engineering, and related technologies	8,748	10.7	11.0
Agriculture, natural resources and conservation	1,529	1.9	1.0
Health and related fields	7,214	8.8	7.6
Personal, protective and transportation services	2,913	3.6	3.0
Other fields of study	22	0.0	0.0

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

Table 17: Mobility Status, Grey County vs. Ontario, 2014

	Grey County	Grey County %	Ontario %
Total population 1 year and over by mobility status 1 year ago - 20% Sample Data	95,047		13,622,941
Non-movers	86,147	90.6	88.3
Movers	8,900	9.4	11.7
Non-migrants	4,395	4.6	6.9
Migrants	4,505	4.7	4.8
Internal migrants	4,455	4.7	3.9
Intraprovincial migrants	4,253	4.5	3.4
Interprovincial migrants	202	0.2	0.5
External migrants	50	0.1	1.0
Total population 5 years and over by mobility status 5 years ago - 20% Sample Data	95,047		13,622,941
Non-movers	64,522	67.9	62.2
Movers	30,525	32.1	37.8
Non-migrants	13,624	14.3	21.0
Migrants	16,901	17.8	16.9
Internal migrants	16,536	17.4	12.8
Intraprovincial migrants	15,704	16.5	11.3
Interprovincial migrants	832	0.9	1.5
External migrants	365	0.4	4.0

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

Table 18: Knowledge of Official Language, Grey County vs. Ontario, 2014

	Grey County	Grey County %	Ontario %
Total population by knowledge of official languages	95,047		13,622,941
English only	89,799	94.5	86.3
French only	10	0.0	0.3
English and French	4,850	5.1	11.0
Neither English nor French	388	0.4	2.4

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

Table 19: Key Labour Force Indicators, Grey County vs. ON, 2006, 2011, 2014

Characteristic	Grey County			Ontario		
	2006	2011	2014	2006	2011	2014
Total population 15 years and over by labour force activity	75,695	76,340	81,607	9,819,420	10,473,670	11,393,642
In the labour force	48,885	48,085	52,677	6,587,575	6,864,990	7,549,583
Employed	46,335	44,535	49,233	6,164,245	6,297,005	6,988,499
Unemployed	2,545	3,545	3,444	423,335	567,985	561,084
Not in the labour force	26,810	28,255	28,930	3,231,840	3,608,685	3,844,059
Participation rate (%)	64.6	63.0	64.6	67.1	65.5	66.3
Employment rate (%)	61.2	58.3	60.3	62.8	60.1	61.3
Unemployment rate (%)	5.2	7.4	6.5	6.4	8.3	7.4

Source: McSweeney & Associates from Statistics Canada 2006, 2011 Census data and Manifold Data Mining Inc. Superdemographics 2014.

Table 20: Labour Force by Industry, Grey County vs. Ontario, 2014

	Grey County	Grey County %	Ontario %
Total labour force 15 years and over by industry	52,677		7,549,583
Industry - Not applicable	859	1.6	2.7
All industries	51,818	98.4	97.3
Agriculture, forestry, fishing and hunting	3,584	6.8	1.5
Mining and oil and gas extraction	247	0.5	0.4
Utilities	689	1.3	0.8
Construction	4,888	9.3	6.1
Manufacturing	5,944	11.3	10.2
Wholesale trade	1,417	2.7	4.5
Retail trade	5,766	10.9	11.0
Transportation and warehousing	1,770	3.4	4.5
Information and cultural industries	627	1.2	2.6
Finance and insurance	1,504	2.9	5.3
Real estate and rental and leasing	1,010	1.9	1.9
Professional, scientific and technical services	2,395	4.5	7.4
Management of companies and enterprises	0	0.0	0.1
Admin. and support, waste mgmt and remediation services	2,102	4.0	4.5
Educational services	3,169	6.0	7.3
Health care and social assistance	6,871	13.0	10.1
Arts, entertainment and recreation	1,324	2.5	2.1
Accommodation and food services	3,402	6.5	6.1
Other services (except public administration)	2,270	4.3	4.3
Public administration	2,837	5.4	6.7

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2014.

Table 21: Labour Force by Occupation, Grey County vs. Ontario, 2014

	Grey County	Grey County %	Ontario %
Total labour force 15 years and over by occupation - 2006 National Occupational Classification for Statistics	52,677		7,549,583
Occupation - Not applicable	859	1.6	2.7
All occupations	51,818	98.4	97.3
Management occupations	6,453	12.3	11.2
Business; finance and administration occupations	6,741	12.8	16.6
Natural and applied sciences and related occupations	1,925	3.7	7.2
Health occupations	3,914	7.4	5.7
Occupations in education; law and social; community and government services	5,161	9.8	11.7
Occupations in art; culture; recreation and sport	1,210	2.3	3.0
Sales and service occupations	11,562	21.9	22.6
Trades; transport and equipment operators and related occupations	9,519	18.1	12.6
Natural resources; agriculture and related production occupations	2,016	3.8	1.6
Occupations in manufacturing and utilities	3,317	6.3	5.1

Source: McSweeney & Associates Manifold Data Mining Inc. Superdemographics 2014.

Table 22: Grey County Business Pattern Data – Sector Level

	2009 June	2013 Dec.	% of Total 2013 Dec.	G.C. % Change 6/2009 to 12/2013	ON % Change 6/2009 to 12/2013
Total Number of Businesses	6,719	7,908		17.7	13.58
11 - Agriculture, Forestry, Fishing and Hunting	972	1,231	15.57	26.6	16.47
21 - Mining, Quarring, and Oil and Gas Extraction	3	8	0.10	166.7	28.04
22 - Utilities	11	26	0.33	136.4	49.15
23 - Construction	968	1,065	13.47	10.0	13.90
31-33 - Manufacturing	263	308	3.89	17.1	-0.97
41 - Wholesale Trade	271	250	3.16	-7.7	-8.17
44-45 - Retail Trade	730	804	10.17	10.1	5.29
48-49 - Transportation and Warehousing	309	322	4.07	4.2	23.95
51 - Information and Cultural Industries	71	85	1.07	19.7	24.66
52 - Finance and Insurance	299	338	4.27	13.0	10.92
53 - Real Estate and Rental and Leasing	470	773	9.77	64.5	45.76
54 - Professional, Scientific and Technical Services	545	686	8.67	25.9	14.28
55 - Management of Companies and Enterprises	167	153	1.93	-8.4	-14.08
56 - Administrative and Support, Waste Management and Remediation Services	298	293	3.71	-1.7	8.94
61 - Educational Services	58	59	0.75	1.7	9.60
62 - Health Care and Social Assistance	319	421	5.32	32.0	48.07
71 - Arts, Entertainment and Recreation	125	127	1.61	1.6	12.74
72 - Accommodation and Food Services	270	296	3.74	9.6	8.96
81 - Other Services (except Public Administration)	554	651	8.23	17.5	-0.12
91 - Public Administration	16	12	0.15	-25.0	8.57

Source: McSweeney & Associates from Canadian Business Patterns June 2009 and December 2013.

Table 23: Grey County Business Pattern Data – Sub-Sector Level

	2009 June	2013 Dec.	% of Total 2013 Dec.	G.C. % Change 6/2009 to 12/2013	ON % Change 6/2009 to 12/2013
Total	6,719	7,908		17.70	13.58
111-112 Farms	919	1,169	14.78	27.20	17.83
531 Real estate	432	744	9.41	72.22	50.83
541 Professional, scientific and technical services	545	686	8.67	25.87	14.28
238 Specialty trade contractors	623	657	8.31	5.46	12.24
236 Construction of buildings	273	335	4.24	22.71	20.38
621 Ambulatory health care services	235	321	4.06	36.60	51.22
561 Administrative and support services	284	280	3.54	-1.41	8.45
811 Repair and maintenance	239	270	3.41	12.97	5.97
813 Religious, grant-making, civic, and professional and similar organizations	185	237	3.00	28.11	23.31
722 Food services and drinking places	206	231	2.92	12.14	9.57
484 Truck transportation	216	226	2.86	4.63	27.10
523 Securities, commodity contracts, and other financial investment and related activities	186	219	2.77	17.74	9.73
551 Management of companies and enterprises	167	153	1.93	-8.38	-14.08
812 Personal and laundry services	110	132	1.67	20.00	17.64
445 Food and beverage stores	92	131	1.66	42.39	3.92

Source: McSweeney & Associates from Canadian Business Patterns June 2009 and December 2013.

Table 24: Farms Classified by Total Gross Farm Receipts, 2010²⁵

Item	Grey CD ²⁶	% of Total		% of Province				
		Grey CD	ON	Grey CD	Bruce	Haldimand County	Hastings	Norfolk County
Total gross farm receipts (excluding forest products sold), 2010 \$	288,295,498			2.4	3.2	2.2	0.7	3.5
Total farm reporting	2,248			11.3	6.3	3.0	6.3	4.1
Under \$10,000	695	30.9	23.61	5.7	2.7	1.6	3.8	1.8
\$10,000 to \$24,999	514	22.9	17.51	5.6	3.6	1.4	2.5	2.2
\$25,000 to \$49,999	316	14.1	12.94	4.7	4.4	1.9	1.9	2.6
\$50,000 to \$99,999	229	10.2	11.91	3.7	4.7	1.7	1.7	2.9

²⁵ Total gross farm receipts was amount in current dollars. The other are number of Farms reporting.

Farms classified by total gross farm receipts, 2010. Gross farm receipts and some operating expenses are understated at the aggregate level due to the increase in contractual arrangements (e.g., contract feeding), custom work performed by non-farmers, and the involvement in primary agriculture of large non-farm corporations such as food processors, meatpacking plants and others.

Farms classified by total gross farm receipts, 2010. Comparisons of the Census of Agriculture data with other Statistics Canada sources such as the Taxation Data Program (TDP), the Farm Financial Survey (FFS) and the Agriculture Economic Statistics (AES) series are affected by differences in concepts, methods and coverage. The combined effect of these differences may result in substantial discrepancies in level estimates and in trends.

Farms classified by total gross farm receipts, 2010. All references to a dollar value are based on the current dollar of the respective year.

²⁶ CD = Census Division as defined by Statistics Canada.

Item	Grey CD ²⁶	% of Total		% of Province				
		Grey CD	ON	Grey CD	Bruce	Haldimand County	Hastings	Norfolk County
\$100,000 to \$249,999	240	10.7	13.45	3.4	5.0	1.6	1.0	3.1
\$250,000 to \$499,999	154	6.9	9.79	3.0	4.2	1.5	1.2	3.0
\$500,000 to \$999,999	65	2.9	6.25	2.0	3.7	2.2	1.0	2.3
\$1,000,000 to \$1,999,999	21	0.9	3.00	1.3	4.1	2.0	0.4	3.5
\$2,000,000 and over	14	0.6	1.55	1.7	2.1	1.9	0.2	5.0

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 25: Major Hay & Field Crops (hectares), 2011

Item	Grey CD	% of Province				
		Grey CD	Bruce	Haldimand County	Hastings	Norfolk County
Total wheat ²⁷	10,021	2.0	4.8	1.8	0.7	1.1
Spring wheat (excluding durum)	2,423	0.5	n/a	n/a	n/a	0.0
Winter wheat	7,598	0.8	4.7	1.9	n/a	1.1
Total corn ²⁸	13,696	1.5	3.5	1.2	1.1	2.9
Corn for silage	4,736	4.3	6.1	1.2	1.6	0.7
Corn for grain	8,961	1.1	3.1	1.2	1.0	3.2
Barley	6,374	12.4	7.7	n/a	1.0	n/a
Oats	1,286	4.5	3.8	1.5	2.8	0.4
Mixed grains	6,282	14.6	10.6	0.1	2.9	0.3
Soybeans	12,674	1.3	3.9	3.5	0.8	2.7
Canola (rapeseed)	4,475	12.5	7.2	n/a	n/a	n/a
Flaxseed	129	10.7	4.2	0.0	0.0	n/a
Dry field peas	31	1.6	10.9	0.0	1.3	n/a
Total rye ²⁹	120	0.9	0.5	0.6	0.5	50.2
Fall rye	120	0.9	0.5	0.7	n/a	50.6
Spring rye	0	0.0	0.0	0.0	n/a	42.3
Dry white beans	x	n/a	7.2	n/a	n/a	n/a
Alfalfa and alfalfa mixtures	41,925	7.7	6.1	1.7	3.5	0.4
All other tame hay and fodder crops	13,674	4.6	3.7	1.6	3.8	0.3
Potatoes	16	0.1	0.4	0.0	0.2	7.2

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 26: Major Fruit Crops (hectares), 2011

Item	Grey CD	% of Total		% of Province				
		Grey CD	ON	Grey CD	Bruce	Haldimand County	Hastings	Norfolk County
Apples	1,442	95.6	30.0	22.5	0.8	0.2	0.5	14.0

²⁷ Total wheat. "Total wheat" includes "Spring wheat," "Durum wheat" and "Winter wheat."

²⁸ Total corn. "Total corn" includes "Corn for grain" and "Corn for silage."

²⁹ Total rye. "Total rye" includes "Fall rye" and "Spring rye."

Pears	12	0.8	2.6	2.1	0.7	3.0	0.4	3.0
Plums and prunes	2	0.1	2.0	0.5	n/a	0.0	0.2	0.5
Grapes	13	0.9	34.9	0.2	n/a	0.1	0.1	0.4
Strawberries	14	0.9	6.2	1.1	1.9	0.6	1.3	14.1
Raspberries	8	0.5	1.7	2.2	1.6	0.5	3.0	4.7
Total Fruit Crops	1,508	100.0	100.0	7.1	0.5	0.3	0.4	7.9

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 27: Major Vegetable Crops (hectares), 2011

Item	Grey CD	% of Total		% of Province				
		Grey CD	ON	Grey CD	Bruce	Haldimand County	Hastings	Norfolk County
Sweet Corn	41	31.3	19.7	0.4	0.6	0.4	1.2	17.7
Tomatoes	12	9.2	12.8	0.2	0.1	0.1	0.2	6.4
Cucumbers	8	6.1	2.7	0.6	0.4	0.1	0.4	31.0
Green Peas	3	2.3	11.7	0.0	0.2	0.0	0.1	0.8
Peppers	4	3.1	3.0	0.3	0.1	0.1	0.3	28.5
Squash and zucchini	8	6.1	2.8	0.6	1.1	0.8	0.6	26.3
Asparagus, producing	7	5.3	2.1	0.6	0.5	n/a	0.5	n/a
Pumpkins	6	4.6	8.0	0.1	0.3	0.2	0.2	8.2
Total Vegetables	131	100.0	100.0	0.2	0.4	0.2	0.4	12.9

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 28: Livestock Inventories (number) and Poultry Inventories (number), 2011

Item	Grey CD	% of Province				
		Grey CD	Bruce	Haldimand County	Hastings	Norfolk County
Total cows ³⁰	30,892	5.1	5.9	1.6	2.3	0.4
Dairy Cows	7,180	2.3	3.7	1.6	1.5	0.3
Beef Cows	23,712	8.4	8.3	1.6	3.2	0.4
Calves under 1 year	30,903	6.8	7.7	1.3	2.0	0.3
Steers 1 year and over	27,996	9.6	17.5	0.4	0.9	0.1
Bulls 1 year and over	1,561	7.7	6.3	2.4	3.0	0.5
Total heifers, 1 year and over ³¹	19,856	5.3	9.6	1.2	1.8	0.3
Heifers for slaughter or feeding	11,639	7.4	15.9	0.9	1.4	0.2
Heifers for beef herd replacement	2,950	7.0	8.7	1.4	3.3	0.5
Heifers for dairy herd replacement	5,267	3.0	4.1	1.4	1.8	0.3
Total cattle and calves ³²	111,208	6.4	9.1	1.3	1.9	0.3

³⁰ Total cows. "Total cows" includes "Beef cows" and "Dairy cows."

³¹ Total heifers, 1 year and over. "Total heifers 1 year and over" includes "Heifers for slaughter or feeding," "Heifers for beef herd replacement" and "Heifers for dairy herd replacement."

Item	Grey CD	% of Province				
		Grey CD	Bruce	Haldimand County	Hastings	Norfolk County
Total Pigs	33,914	1.1	3.5	2.4	0.2	1.9
Total sheep and lambs ³³	25,181	7.1	6.0	1.4	1.5	0.5
Rams	678	7.9	5.6	1.2	2.6	0.5
Ewes	13,799	7.5	6.3	1.5	1.6	0.6
Lambs	10,704	6.7	5.5	1.2	1.4	0.4
Horses and ponies	4,504	5.2	3.4	1.4	1.9	1.0
Goats	8,217	7.1	8.9	2.7	3.1	1.5
Rabbits ³⁴	13,245	14.2	11.7	0.7	1.1	0.6
Total Hens and Chickens	1,178,561	2.5	3.0	4.7	0.4	1.8
Turkeys ³⁵	112,558	3.2	n/a	n/a	n/a	n/a

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 29: Hay and Field Crops, 2006 to 2011 (hectares)

	Grey CD		% of ON		% Change 2006 to 2011	
	2006	2011	2006	2011	Grey CD	ON
Total wheat (43)	7,067	10,021	1.4	2.0	41.8	-1.5
Spring wheat (excluding durum)	X	2,423	n/a	5.2	n/a	-43.5
Winter wheat	4,344	7,598	1.0	1.7	74.9	7.0
Oats	2,187	1,286	4.1	4.5	-41.2	-46.2
Barley	9,082	6,374	10.2	12.4	-29.8	-42.6
Mixed grains	10,827	6,282	15.4	14.6	-42.0	-38.8
Total corn (44)	12,071	13,696	1.6	1.5	13.5	21.4
Corn for grain	5,658	8,961	0.9	1.1	58.4	28.8
Corn for silage	6,413	4,736	4.9	4.3	-26.2	-15.3
Total rye (45)	250	120	0.9	0.9	-52.0	-46.6
Fall rye	231	120	0.9	0.9	-48.1	-47.9
Spring rye	19	0	2.1	0.0	-100.0	-11.4
Canola (rapeseed)	358	4,475	4.8	12.5	1150.0	375.3
Soybeans	7,335	12,674	0.8	1.3	72.8	14.3
Flaxseed	110	129	6.4	10.7	17.3	-30.2
Dry field peas	45	31	2.5	1.6	-31.1	9.8
Dry white beans	196	X	0.5	n/a	n/a	-56.4
Alfalfa and alfalfa mixtures	54,898	41,925	8.2	7.7	-23.6	-19.0
All other tame hay and fodder crops	17,213	13,674	4.7	4.6	-20.6	-18.7

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

³² Total cattle and calves. "Total cattle and calves" includes "Calves under 1 year," "Steers 1 year and over," "Heifers for slaughter or feeding," "Heifers for beef herd replacement," "Heifers for dairy herd replacement," "Beef cows," "Dairy cows" and "Bulls 1 year and over."

³³ Total sheep and lambs. "Total sheep and lambs" includes "Rams," "Ewes" and "Lambs."

³⁴ Rabbits. New for 2011; therefore comparison with 2006 is not possible.

³⁵ Turkeys. Turkey inventories reflect the total number of birds on Census Day and should be used with caution. Poultry inventories will fluctuate because barns that were empty on Census Day had no inventories to report. Users are advised to use the annual production data as a more accurate reflection of changes in these agricultural sectors over time.

Table 30: Total Area of Fruits, Berries, Nuts (Producing and Non-producing) 2006 to 2011

	Grey CD		% of ON		% Change 2006 to 2011	
	2006	2011	2006	2011	Grey CD	ON
Total area of fruits, berries and nuts (producing and non-producing)	1,848	1,508	7.2	7.1	-18.4	-17.2
Apples total area	1,740	1,442	21.3	22.5	-17.1	-21.5
Pears total area	23	12	2.2	2.1	-47.8	-45.6
Grapes total area	14	13	0.2	0.2	-7.1	-10.7
Strawberries total area	21	14	1.2	1.1	-33.3	-22.6
Raspberries total area	13	8	2.8	2.2	-38.5	-21.8

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 31: Total Vegetables (Excluding Greenhouse Vegetables), 2006 to 2011

	Grey CD		% of ON		% Change 2006 to 2011	
	2006	2011	2006	2011	Grey CD	ON
Total vegetables (excluding greenhouse vegetables)	126	131	0.2	0.2	4.0	-16.7
Sweet corn	37	41	0.2	0.4	10.8	-33.9
Tomatoes	10	12	0.1	0.2	20.0	-18.0
Green peas	6	3	0.1	0.0	-50.0	-29.6
Carrots	4	2	0.1	0.1	-50.0	-1.4
Pumpkins	15	6	0.7	0.3	-60.0	-14.2
Squash and zucchini	7	8	0.4	0.6	14.3	-7.2
Asparagus, producing	6	7	0.5	0.6	16.7	-15.5

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 32: Livestock Inventories (number) and Poultry Inventories (number), 2006 to 2011

	Grey CD		% of ON		% Change 2006 to 2011	
	2006	2011	2006	2011	Grey CD	ON
Calves, under 1 year	36,650	30,903	7.0	6.8	-15.7	-13.3
Steers, 1 year and over	33,154	27,996	10.6	9.6	-15.6	-6.6
Total heifers, 1 year and over ³⁶	25,507	19,856	6.2	5.3	-22.2	-10.0
Heifers for slaughter or feeding	14,571	11,639	8.2	7.4	-20.1	-11.7
Heifers for beef herd replacement	3,650	2,950	7.5	7.0	-19.2	-13.9
Heifers for dairy herd replacement	7,286	5,267	3.9	3.0	-27.7	-7.4
Total cows ³⁷	41,184	30,892	5.8	5.1	-25.0	-15.1
Beef cows	32,818	23,712	8.7	8.4	-27.7	-25.3
Dairy cows	8,366	7,180	2.5	2.3	-14.2	-3.5

³⁶ Total heifers, 1 year and over. "Total heifers 1 year and over" includes "Heifers for slaughter or feeding," "Heifers for beef herd replacement" and "Heifers for dairy herd replacement."

³⁷ Total cows. "Total cows" includes "Beef cows" and "Dairy cows."

Bulls, 1 year and over	1,656	1,561	7.3	7.7	-5.7	-9.9
Total cattle and calves ³⁸	138,151	111,208	7.0	6.4	-19.5	-12.2
Rams	637	678	9.0	7.9	6.4	20.0
Ewes	13,697	13,799	8.6	7.5	0.7	16.4
Lambs	25,289	10,704	17.4	6.7	-57.7	9.7
Total sheep and lambs ³⁹	39,623	25,181	12.7	7.1	-36.4	13.4
Total pigs ⁴⁰	53,569	33,914	1.4	1.1	-36.7	-21.8
Horses and ponies	5,578	4,504	5.7	5.2	-19.3	-10.9
Goats	7,085	8,217	9.3	7.1	16.0	52.7
Llamas and alpacas	277	260	6.4	4.1	-6.1	45.0
Bison (buffalo)	208	163	5.1	7.0	-21.6	-43.5
Elk	445	X	12.5	n/a	n/a	-54.9
Deer (excluding wild deer)	169	71	2.1	2.3	-58.0	-62.4
Wild boars	255	X	25.3	n/a	n/a	-53.0
Pullets under 19 weeks, intended for laying ⁴¹	311,357	X	6.5	n/a	n/a	-0.7
Laying hens, 19 weeks and over ⁴²	522,950	281,683	5.2	3.3	-46.1	-16.8
Broilers, roasters and Cornish ⁴³	450,232	543,050	1.5	1.7	20.6	9.4
Rabbits ⁴⁴		13,245				
Total hens and chickens ⁴⁵	1,284,539	1,178,561	2.9	2.5	-8.3	6.4
Turkeys ⁴⁶	104,610	112,558	2.9	3.2	7.6	-2.0
Other poultry	13,906	8,296	0.5	0.6	-40.3	-48.8

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

Table 33: Farms Classified by Total Gross Farm Receipts, 2010⁴⁷

³⁸ Total cattle and calves. "Total cattle and calves" includes "Calves under 1 year," "Steers 1 year and over," "Heifers for slaughter or feeding," "Heifers for beef herd replacement," "Heifers for dairy herd replacement," "Beef cows," "Dairy cows" and "Bulls 1 year and over."

³⁹ Total sheep and lambs. "Total sheep and lambs" includes "Rams," "Ewes" and "Lambs."

⁴⁰ Total pigs. "Total pigs" includes "Boars," "Sows and gilts for breeding," "Nursing pigs," "weaner pigs" and "Grower and finishing pigs."

⁴¹ Pullets under 19 weeks, intended for laying. Due to conceptual changes, 2011 data are not comparable with 2006 data: 2011 data includes pullets intended for laying table eggs only, whereas 2006 data includes pullets intended for laying table eggs and pullets intended for layer or broiler breeding.

⁴² Laying hens, 19 weeks and over. Due to conceptual changes, 2011 data are not comparable with 2006 data: 2011 data includes laying hens that produce table eggs only, whereas 2006 data includes hens that produce table eggs and hens kept as layer or broiler breeders.

⁴³ Broilers, roasters and Cornish. Broiler inventories reflect the total number of birds on Census Day and should be used with caution. Poultry inventories will fluctuate because barns that were empty on Census Day had no inventories to report. Users are advised to use the annual production data as a more accurate reflection of changes in these agricultural sectors over time.

⁴⁴ Rabbits. New for 2011; therefore comparison with 2006 is not possible.

⁴⁵ Total hens and chickens. "Total hens and chickens" includes "Broilers, roasters and Cornish," "Pullets under 19 weeks intended for laying" and "Laying hens 19 weeks and over."

⁴⁶ Turkeys. Turkey inventories reflect the total number of birds on Census Day and should be used with caution. Poultry inventories will fluctuate because barns that were empty on Census Day had no inventories to report. Users are advised to use the annual production data as a more accurate reflection of changes in these agricultural sectors over time.

⁴⁷ Total gross farm receipts was amount in current dollars. The other are number of Farms reporting.

Farms classified by total gross farm receipts, 2010. Gross farm receipts and some operating expenses are understated at the aggregate level due to the increase in contractual arrangements (e.g., contract feeding), custom work performed by non-farmers, and the involvement in primary agriculture of large non-farm corporations such as food processors, meatpacking plants and others.

Farms classified by total gross farm receipts, 2010. Comparisons of the Census of Agriculture data with other Statistics Canada sources such as the Taxation Data Program (TDP), the Farm Financial Survey (FFS) and the Agriculture Economic Statistics

	Grey CD		% of ON		% Change 2006 to 2011	
	2006	2011	2006	2011	Grey CD	ON
Total gross farm receipts (excluding forest products sold), 2010 \$	267,295,850	288,295,498	2.6	2.4	7.9	15.0
Under \$10,000	846	695	5.8	5.7	-17.8	-15.4
\$10,000 to \$24,999	630	514	5.8	5.6	-18.4	-16.0
\$25,000 to \$49,999	346	316	4.7	4.7	-8.7	-9.2
\$50,000 to \$99,999	312	229	4.8	3.7	-26.6	-5.1
\$100,000 to \$249,999	316	240	4.0	3.4	-24.1	-12.3
\$250,000 to \$499,999	163	154	2.9	3.0	-5.5	-9.0
\$500,000 to \$999,999	47	65	1.7	2.0	38.3	18.3
\$1,000,000 to \$1,999,999	18	21	1.6	1.3	16.7	41.9
\$2,000,000 and over	9	14	1.6	1.7	55.6	41.4

Source: McSweeney & Associates from Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

(AES) series are affected by differences in concepts, methods and coverage. The combined effect of these differences may result in substantial discrepancies in level estimates and in trends.

Farms classified by total gross farm receipts, 2010. All references to a dollar value are based on the current dollar of the respective year.

Table 34: Canada and Ontario Economic Indicators Outlook

Annual Average Percent Change	2013e	Canada 2014f	2015f	2013e	Ontario 2014f	2015f
Real GDP	2.0	2.0-2.5	2.5-2.7	1.2-1.4	2.0-2.5	2.4-2.9
Employment	1.3	0.7-1.1	1.0-1.2	1.4	0.6-0.9	1.0-1.3
Unemployment (%)	7.1	6.8-7.0	6.6-6.7	7.5-7.6	7.3-7.4	7.0-7.1
CPI	0.9	1.4-2.1	1.8-2.0	1.0-1.1	1.5-2.6	1.8-2.0
Retail Trade	2.5-3.2	3.8-4.2	4.0-4.1	1.8-2.3	3.4-3.8	3.9-4.2
Housing Starts	-12.5	0.9	-9.7	-21.2	2.2	-10.7
Existing home sales	0.8	3.1	-3.4	0.5	2.7	-4.9
Average Existing Home Price	5.6	5.3	0.2	5.1	6.2	0.4

Source: McSweeney & Associates from RBC, *Provincial Outlook*, March 2014; TD Economics, *Provincial Economic Forecast*, July, 2014; BMO *Provincial Economic Outlook*, August 15, 2014.

Table 35: Canadian Export Forecast by Sector (% Growth)

Main Sectors	% Share of Total Exports (2013)	Export Outlook (% growth)		
		2013	2014 f	2015 f
Agri-food	9.5	5.7	11	3
Energy	23.3	6.0	7	4
Forestry	5.6	12.6	12	11
Chemicals and Plastics	7.0	7.2	2	6
Fertilizers	1.5	-4.9	4	2
Metals, Ores and Other Industrial Products	11.7	0.0	6	8
Industrial Machinery and Equipment	5.3	-1.9	7	13
Aircraft & parts	2.1	4.1	4	8
Advanced Technology	2.6	-0.4	5	3
Motor Vehicles and Parts	11.8	-0.8	3	4
Consumer Goods	1.5	11.2	3	7
Special transactions*	0.7	10.2	8	8
Total Goods Sector	83.6	3.6	9	6
Total Services Sector	16.4	3.2	3	4
Total Exports	100.0	3.5	8	6

Source: EDC *Global Export Forecast Spring 2014*, p. 26. Statistics Canada, EDC Economics, 2013 is actual data while 2014 and 2015 are forecast. Special transactions* mainly low-valued transactions, value of repairs to equipment and goods returned to country of origin.

Table 36: Ontario Merchandise Export Outlook

Main Sectors	% Share of Exports(2013)	Global Outlook (% growth)		
		2013	2014 f	2015 f
Motor Vehicle, Parts	35.2	-1.1	2	4
Ores and Metals	20.4	0.8	8	12
Chemicals/Plastics	12.2	6.6	2	6
Industrial Machinery	8.8	-1.6	7	13
All Others	23.8	2.7	11	6
Total	100	1.0	6	7
Total excl. energy	97	1.2	6	8

Source: EDC *Global Export Forecast Spring 2014*, p. 47. Statistics Canada, EDC Economics

Table 37: Canadian Industrial Outlook – GDP by Industry*

Industry	% change (Y/Y)	
	2014f	2015f
All industries (GDP)	2.3	2.5
Good Industries	2.2	3.3
Primary Industries	2.8	4.3
Agriculture	-9.4	4.1
Oil&Gas	4.8	4.4
Non-energyMining	2.7	3.6
Forestry,Logging&OtherPrimary	7.7	6.5
Manufacturing	2.9	4.0
Construction	0.1	1.3
Residential	-0.7	-3.2
Non-res. & Engineering	0.5	3.5
Utilities	2.2	2.3
Service Industries	2.4	2.2
Wholesale Trade	3.3	3.8
Retail Trade	2.4	2.4
Transportation & Warehousing	3.4	3.6
Information & Cultural Industries	2.5	2.3
Finance, Insurance & Real Estate	2.5	2.2
Professional Services	2.7	2.8
Accommodation & Food Services	3.5	3.2
Public services**	1.4	1.4
Other Services	2.7	1.1

Source: TD Economics *Industrial Outlook*, April 25, 2014. *Measuredinchained2007dollars;ForecastbyTDEconomicsasatApril 2014.Source:StatisticsCanada/HaverAnalytics,TDEconomics. **IncludesPublicAdministration,HealthCare,&EducationServices.

Table 38: Canada and Ontario Employment Outlook by Industry – Q3/2014

Industry	Canada Net Employment Outlook (%)	Ontario Net Employment Outlook (%)
All Industries	16	14
Construction	26	19
Education	14	12
Finance, Insurance & Real Estate	14	6
Manufacturing - Durables	23	18
Manufacturing – Non-Durables	6	5
Mining	13	9
Public Administration	29	29
Services	12	10
Transportation & Public Utilities	27	31
Wholesale & Retail Trade	16	15

Source: Manpower Employment Outlook Survey – Q3/2014.

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