

PHASE ONE
COMPREHENSIVE REVIEW
OXFORD COUNTY



HEMSON Consulting Ltd.

March, 2020

EXECUTIVE SUMMARY

This report provides the results of the Oxford County Phase One Comprehensive Review, including County-wide and Area Municipal population, household and employment forecasts, and a land need analysis. The study will inform potential updates to the *Oxford County Official Plan* and a range of planning and growth management related initiatives in the County.

Key findings include:

- Oxford County has continued to grow over recent Census periods, adding 10,850 residents, 7,000 households and nearly 9,500 jobs over the 2001 (the starting point of historical trend reporting in this document) to 2016 timeframe. Housing growth has been out-pacing growth in population, in large part tied to an aging population and resulting gradual decline in average household size.
- The County experienced net employment growth since 2001 even during the 2006 to 2011 period when most municipalities in Southwestern Ontario experienced a significant decline associated with the 2008–09 recession, particularly in manufacturing and related industries.
- Within the County, most of the residential growth that occurred since 2001 was concentrated in only a few municipalities, predominately Woodstock and the other large urban centres of Ingersoll and Tillsonburg. Employment growth was variable and several Area Municipalities within Oxford experienced some decline, notwithstanding that there was County-wide growth.
- Oxford had robust population growth from 2011 to 2016. Based on housing construction and permits since 2016, the outlook for 2016 to 2021 is for growth of about 8,700 people. This would be the highest absolute population growth in a five-year period since the restructured County was formed in 1975, exceeding the 7,500 growth experienced between 1986 and 1991.
- The outlook going forward is for a continuation of relatively high levels of net in-migration to the County compared to the past periods. Growth and development in this decade to date indicates a changing role for the County within Southwestern Ontario and its adjacency to the Greater Golden Horseshoe. The result is a much higher growth outlook than prior forecasts prepared for the County.
 - The County is forecast to grow to 161,000 in total population and 62,000 households by 2046, representing growth of 47,200 residents and 18,300 households from a 2016 base.

- Employment growth is also expected to continue over the forecast horizon with the County anticipated to grow to an employment base of 78,400 in total place of work employment to 2046, representing growth of 21,100 jobs over the forecast horizon from a 2016 base.
- The County is required by the Provincial Policy Statement (PPS) 2014, to identify, coordinate and allocate the forecasts for Area Municipalities within Oxford. Forecasts were developed for the Area Municipalities based on the County-wide forecasts resulting in a planned distribution of population, housing and employment growth to 2046 within Oxford.
- Consistent with Provincial planning policy, the vast majority of growth is planned to be accommodated in the County's fully serviced settlement areas. All Area Municipalities are anticipated to experience some growth in population, households and employment over the forecast period.
 - More than half the County-wide residential and employment growth over the 2016 to 2046 horizon is anticipated to occur in the City of Woodstock, the largest urban centre in the County.
 - The County's two other urban centres, the Towns of Ingersoll and Tillsonburg, are also anticipated to experience continued growth going forward, accounting for roughly 25% of the housing and employment growth forecast.
 - The balance 25% of household growth is forecast to occur within the five Townships, with fully serviced settlement areas being where most of this growth is expected to occur. Moderate employment growth is also anticipated to occur within all five Townships to 2046.
- The forecasts provide key input into a land needs assessment, which examines the three, ten and twenty year supply and land needed to accommodate growth within Oxford's Area Municipalities. Some potential shortages to meet the growth outlook were identified to a 2039 horizon.
- The Oxford County Vacant Land Inventory was updated to a 2019 base to assess land need in Oxford's serviced settlement areas for a twenty-year timeframe to a 2039 planning horizon.
 - The results of the residential land supply inventory indicate 270 hectares (ha) of net vacant developable residential land County-wide; and nearly 4,200 units within approved plans.
 - The results of the industrial land supply inventory indicate 403 net ha of long-term development industrial land supply available to accommodate employment growth in the County. This net development supply also provides for a marginal level of underutilization and long-

term vacancy in order to reflect realistic development potential on industrial lands.

- A commercial and institutional land supply of 102 net ha was also identified. The ability to accommodate some population-serving uses in residential areas is also provided for in the determination of net residential land supply.
- A land needs assessment was undertaken for residential and employment uses, in a manner consistent with Provincial policy and taking into consideration growth potential on vacant designated lands and through intensification.
 - The residential land need assessment indicates that the County is meeting the intensification target in the County Official Plan and that growth will continue to be accommodated through intensification, both through development within built-up areas and through a forecasted shift to moderately higher density residential forms over the planning period. Further, it was concluded that the residential intensification targets and density requirements set out in the County Official Plan are reasonable and appropriate.
 - Additional land may be required and justifiable in accordance with Provincial policy in some Area Municipalities. Consideration was given to residential unit growth potential and associated land need for key planning periods. It was determined that, overall, the County has a sufficient number of units in approved plans to meet Provincial policy direction for a 3-year housing supply. Potential additional land need to accommodate the 10 and 20 year (2019-2039) residential growth outlook was identified for a number of the Area Municipalities, with 20 year land need as follows:
 - 225 gross developable ha in the City of Woodstock;
 - 75 gross developable ha Town of Ingersoll;
 - 35 gross developable ha in the Township of East Zorra-Tavistock; and
 - 17 gross developable ha South-West Oxford.
 - The employment land need assessment indicates that additional industrial land is also expected to be required to meet the 20 year (2019-2039) employment growth outlook in the following Area Municipalities:
 - 317 gross developable ha in the City of Woodstock;
 - 109 gross developable ha in the Town of Ingersoll;
 - 12 gross developable ha in the Township of East Zorra-Tavistock; and.

- 3 gross developable ha in the Township of Norwich.
- A high-level assessment of commercial and institutional land was also undertaken. This assessment did not identify a significant need for additional land in any of the Area Municipalities. That said, more detailed community level study or analysis would need to be undertaken in order to determine the specific need for any additional land to accommodate population related employment growth and achieve other community planning objectives in a particular settlement or area.

The results of the Phase One Comprehensive Review will provide a basis for assessing land need in the County's designated settlement areas over the planning period , as well as inform a range of land use planning and growth related studies. Based on the findings from the land need assessment, it would appear that the County and a number of the Area Municipalities, will need to begin considering the actions necessary to ensure sufficient land is available to accommodate forecasted growth. These actions may include, but are not necessarily limited to, boundary adjustments, Phase II Comprehensive Review studies, secondary planning and servicing strategies, planning beyond the planning period for infrastructure and the protection of employment land etc.

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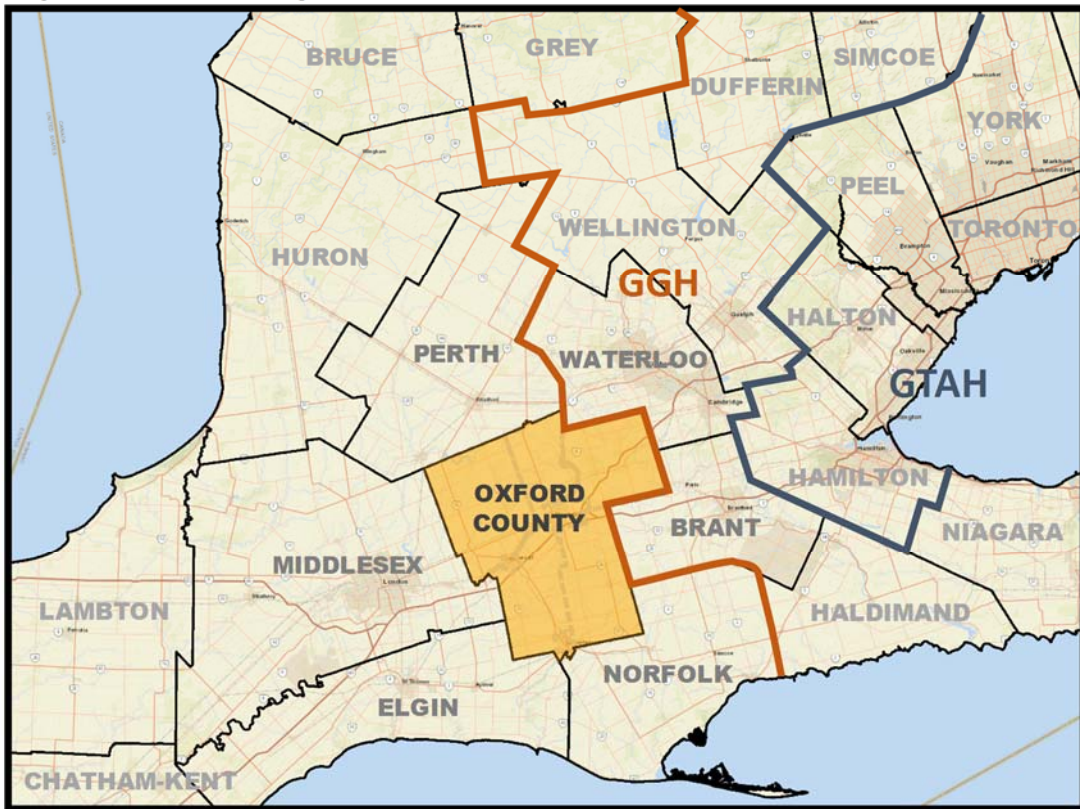
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I INTRODUCTION

The County of Oxford is an upper-tier municipality in Southwestern Ontario covering approximately 2,000 km². Bounded by the Region of Waterloo and the Counties of Brant, Norfolk, Elgin, Middlesex and Perth, Oxford lies due west of the rapidly growing Greater Golden Horseshoe (GGH), which is the highly urbanized sub-region of southern Ontario centred on the Greater Toronto Area and Hamilton (GTAH). Recent development in Oxford, notably high rates of residential development, is in part attributable to the GGH's influence on the demographics and economic growth in this part of southern Ontario.

Map 1 - Oxford County in Southern Ontario Context



Source: Hemson Consulting Ltd. based on Statistics Canada Boundary data.

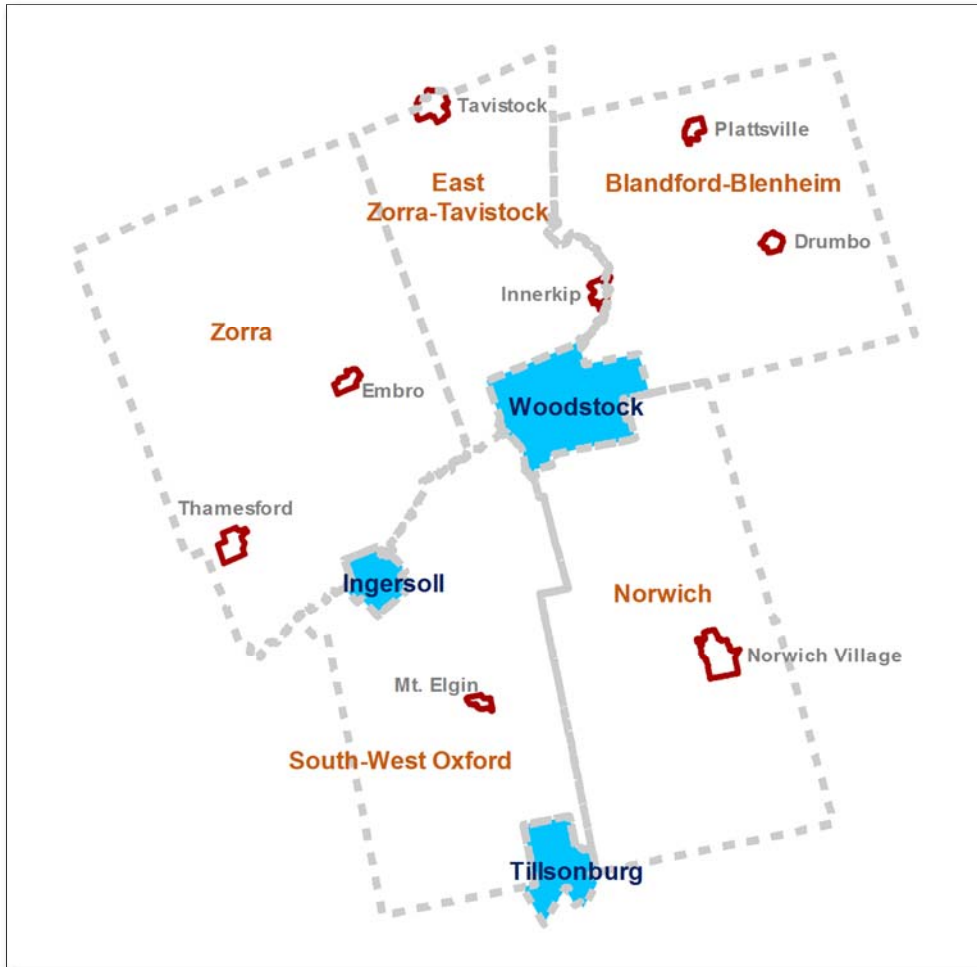
In 2016, the County's population¹ was 114,000 residing in 44,300 households. The County has a strong, largely industrial and agricultural employment base, based on Census data by NAICS², and continues to experience job growth despite declining employment elsewhere in the broader Southwestern Ontario economic region in recent times, as outlined in Section III. Oxford is home to a number of key industrial employers that provide jobs for local residents along with employment opportunities for commuters coming in from beyond its borders. The County's 2016 employment base was 57,300 jobs.

Oxford comprises eight Area Municipalities that range in character from the urban centres of the City of Woodstock and Towns of Ingersoll and Tillsonburg, to the more rural Townships of Blandford-Blenheim, East Zorra-Tavistock, Norwich, South-West Oxford and Zorra. A number of municipally serviced villages, un-serviced and partially serviced villages and rural clusters are spread across the largely agricultural landscape in the five Townships.

¹This report assumes a 2016 Census net undercoverage of 2.71% and County population of 113,940 for forecasting purposes. Although the final 2016 post-censal estimate released by Statistics Canada now indicates a Census net undercoverage of 2.8% and County population of 114,054, it was determined that this minor variation would not impact the forecasts.

² North American Industry Classification System.

Map 2 - Area Municipalities and Serviced Villages, Oxford County



A. PLANNING POLICY FRAMEWORK

Planning and growth management in Oxford is undertaken within the context of a Provincial policy framework, and must be consistent with Provincial land use planning policies and priorities, most notably those set out in the Provincial Policy Statement (PPS), 2014.

The PPS provides direction for land use planning and appropriately managing growth and development in Ontario while protecting and enhancing natural heritage features. The PPS, 2014 includes a number of strengthened directions for the distribution of growth, the protection of natural and agricultural lands, planning for employment lands

and other key growth management policies. It also places a greater emphasis on the unique characteristics and planning considerations for rural communities.

Section 1.1.2 of the PPS provides that:

Sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 20 years (...). Within settlement areas, sufficient land shall be made available through intensification and redevelopment and, if necessary, designated growth areas.

Section 1.1.4 further directs that,

(in order to) provide for an appropriate range and mix of housing types and densities required to meet projected requirements of current and future residents of the regional market area, planning authorities shall:

a) maintain at all times the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands which are designated and available for residential development; and

b) maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.

1.4.2 Where planning is conducted by an upper-tier municipality:

the land and unit supply maintained by the lower-tier municipality identified in policy 1.4.1 shall be based on and reflect the allocation of population and units by the upper-tier municipality.

The PPS provides for population, housing and employment growth projections to be undertaken on the basis of a Regional Market Area, defined as:

an area that has a high degree of social and economic interaction. The upper or single-tier municipality, or planning area, will normally serve as the regional market area. However, where a regional market area extends significantly beyond these boundaries, then the regional market area may be based on the larger market area. Where regional market areas are very large and sparsely populated, a smaller area, if defined in an official plan, may be utilized.

The Province recently released the updated 2020 PPS, which will come into effect on May 1, 2020. . The changes in the 2020 PPS will impact planning and growth management in the County, in particular by extending the permitted timeframe for land

use planning from 20 to 25 years and placing a greater emphasis on applying a market-based approach to the determination of housing need. Although the current 2014 PPS document provides the basis for the analysis in the current Phase One Comprehensive Review, the 30 year forecast period in the study will provide the information necessary for the County to determine forecasted growth and associated land need for the longer planning period permitted in the 2020 PPS, once it comes into effect.

The *Oxford County Official Plan* implements Provincial policy in Oxford. It establishes a vision for Oxford and the Area Municipalities within it, and provides direction for growth management and land use planning for a 20 year planning horizon. The Official Plan includes population, housing and employment projections for the Area Municipalities in Oxford and policies to provide direction on how growth is to be accommodated.

The Official Plan indicates that it is a strategic aim of County Council to prepare and maintain population and employment growth forecasts for the County and Area Municipalities as the basis for designating adequate supplies of land for development, planning capital improvements to infrastructure and planning for public services such as schools, parks and leisure areas.

The distribution of growth within the County and Area Municipalities must be consistent with PPS policies. As such, growth and development is directed to settlements that are served by municipal water and wastewater and contain a broad range and mix of housing, employment and public services. In Oxford, these settlements are designated as 'Large Urban Centres' and 'Serviced Villages' in the Official Plan. Further, the *Oxford County Official Plan* provides specific direction for accommodating growth through intensification, including the establishment of an intensification target:

Intensification will be promoted in appropriate locations within settlements, particularly those serviced by centralized wastewater and water supply facilities, in accordance with the applicable policies of this Plan. A minimum target of 15 percent of all new residential dwelling units created within the Large Urban Centres shall occur by way of residential intensification over the planning period.

More limited growth is directed to rural settlements that are only served by partial (e.g. municipal water) or private services and are typically more residential in nature. In Oxford, these settlements are designated as 'Villages' and 'Rural Clusters' in the Official Plan.

B. BACKGROUND AND STUDY PURPOSE

Hemson Consulting Ltd. was retained to assist the County with undertaking a Phase One Comprehensive Review. The study is comprised of the following key components:

- preparation of County-wide population, household and employment forecasts and Area Municipal growth allocations; and
- preparation of a land need analysis examining the allocations within the context of the sufficiency of the land supply.

The study builds on prior growth forecasting, land needs and growth management studies in the County and will be used to inform potential updates to the *Oxford County Official Plan* policies and to update the growth projections referenced in the Plan. The last forecasts prepared for Oxford were based on 2011 Statistics Canada Census information. The current study incorporates the results from the 2016 Census, providing an opportunity to consider growth prospects in Oxford based on the most current data. Land needs are also assessed within the context of recent development, demographic change and an updated population and employment growth outlook.

The County has undergone rapid residential growth and continued overall growth in employment in recent years. A comprehensive review of how the County is currently growing, as well as a reassessment of the long-term future outlook and land needed to accommodate growth, is prudent and timely as part of the County's ongoing growth management and official plan review work.

The Phase One Comprehensive Review will provide a basis for assessing land need in the County's designated settlements for the 20 year period 2019 to 2039 and beyond, as well as inform a range of land use planning and growth related studies.

It is noted that, as part of the consultation process on this study, a number of the Area Municipalities requested that the County consider settlement expansion opportunities in their municipality. Further, a number of private land owners also expressed interest in potential settlement expansions. Although these submissions provide an indication of municipal and landowner interest in potential settlement expansions, specific consideration of such requests is beyond the scope of this Phase One study. However, where the potential need for additional growth land has been identified for a particular Area Municipality through this study, it will provide the basis for the County and Area Municipality to consider potential settlement expansions. Consideration of any such expansions would require further study (e.g. Phase Two Comprehensive Review, secondary planning, servicing strategies etc.) to determine the specific extent

and most appropriate location for such lands, taking into consideration the full range of local and Provincial policies and objectives.

C. REPORT CONTENTS

Following this introductory section, the balance of this report is organized into seven sections:

- **Section II** examines the level and distribution of recent residential growth and discusses demographic trends affecting the future growth outlook for Oxford.
- **Section III** provides an overview of recent employment growth and economic change within the County.
- **Section IV** provides an overview of the forecast methodology and assumptions that underpin the updated growth outlook and the results of the County-wide population, housing and employment forecasts.
- **Section V** discusses how the County-wide growth forecasts are distributed to each Area Municipality within Oxford and provides the resulting population, housing and employment projections for the 2016 to 2046 forecast horizon and 2019 to 2039 land need planning period.
- **Section VI** provides the methodology and results of an updated 2019 Oxford County Vacant Land Inventory of residential, industrial and commercial institutional designated lands within serviced settlement areas, including discussion of supply characteristics and land supply and need for the range of planning periods consistent with Provincial policy.
- **Section VII** provides the results of the intensification analysis and land needs assessment. The Area Municipal growth allocations are examined within the context of the land supply available to accommodate residential and employment growth and estimated additional land needs are identified.
- **Section VIII** provides conclusions and next steps.

II RESIDENTIAL GROWTH AND DEMOGRAPHIC CHANGE IN OXFORD

Oxford has continued to experience a growing population, housing and employment base. Residential growth has been particularly strong in recent years relative to longer term historical trends, owing in part to the influence of the GGH and influx of residents from neighbouring economic centres of Kitchener-Waterloo to the east and London to the west. The County has a strong industrial economic base and the success of a few key employers has contributed to steady job growth since 2001 (the starting point for reporting of historical employment trends in Oxford in this study). This job growth has taken place in spite of economic shifts in the broader economy and declining employment in much of Southwestern Ontario.

This section summarizes the residential growth and change in Oxford that has occurred over recent Census periods and discusses key demographic and economic trends likely to affect the future growth outlook.

A. POPULATION GROWTH OVER RECENT CENSUS PERIODS

Oxford has continued to grow in population since 2001 (the starting point of the summary tables in this report) with a significant upswing in residential growth in recent years. The County remains an attractive settlement location for those from surrounding regions, and experienced net in-migration in each of the last three Census periods. The level of net in-migration increased over the 2011 to 2016 period, with 3,700 net in-migrants, comparing to roughly 2,000 in each of the prior two five-year periods (see Table 1).

Table 1 - Population and Net In-Migration, Oxford County, 2001-2016

Census Year	Census Population	Total Population ¹	Change	Compound Annual Growth Rate	Net In-Migration
2001	99,270	103,200			
2006	102,750	106,550	3,350	0.6%	2,250
2011	105,730	108,670	2,120	0.4%	2,050
2016	110,860	113,940	5,270	1.0%	3,700
2001-16			10,740		8,000

Source: Statistics Canada Census data and Statistics Canada Annual Demographic Estimates.

Note 1: Total population including Census net undercoverage.

Higher population growth between 2011 and 2016 was driven by continued rapid growth in the GGH. Many GGH municipalities outside the GTA have experienced high in-migration, owing to factors such as relatively lower housing prices further from the major urban centres, competitive industrial land markets, and changing lifestyle preferences as people age. This effect has been most pronounced in areas to the north with recreational and lifestyle amenities and to the west where major economic and transportation corridors connect the GGH to American markets, demonstrated through higher than longer-term historical growth in these areas in recent periods.

B. HOUSING GROWTH IN RELATION TO POPULATION

Recent population growth resulted in more than 7,000 households being added to the County between 2001 and 2016, with the highest growth being in the most recent Census period (see Table 2).

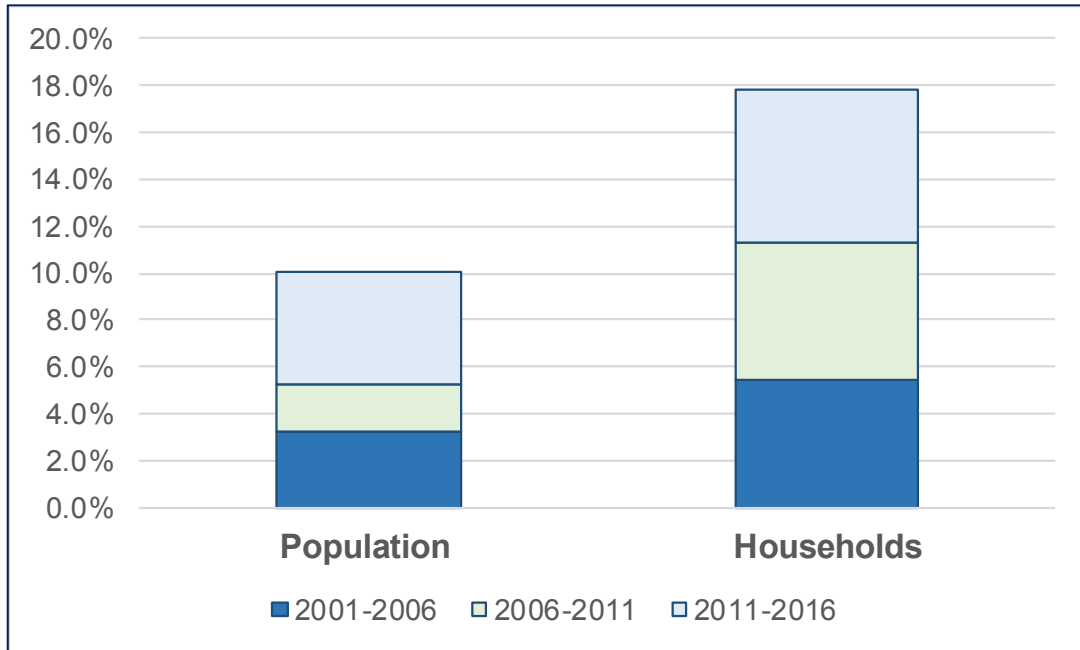
Table 2 - Household Growth, Oxford County, 2001-2016

Census Year	Households	Change	Compound Annual Growth Rate
2001	37,270		
2006	39,310	2,040	1.1%
2011	41,560	2,250	1.1%
2016	44,270	2,710	1.3%
2001-16		7,000	

Source: Statistics Canada Census data.

Household growth in the County has out-paced population growth in recent years. This is illustrated in Figure 1 below.

Figure 1 - Residential Growth Rates by Census Period, Oxford County, 2001-2016



Source: Statistics Canada Census data.

The different growth rates between population and households is due in large part to an aging population, a demographic feature of Oxford that mirrors most of Ontario, particularly in communities outside major urban centres, where the out-migration of younger aged adults to education and employment opportunities in larger urban centres adds to the aging population effect in their home communities. The aging population results in a declining average household size, as older populations generally have households with more “empty nesters”, fewer children, and more single people due to divorce and widowhood. The effect is that a greater number of households are required to house the same amount of population than if that population were younger, as observed in many communities throughout the Province and elsewhere. The sustained fall in average household size that has occurred in Oxford since 2001 is highlighted in Table 3.

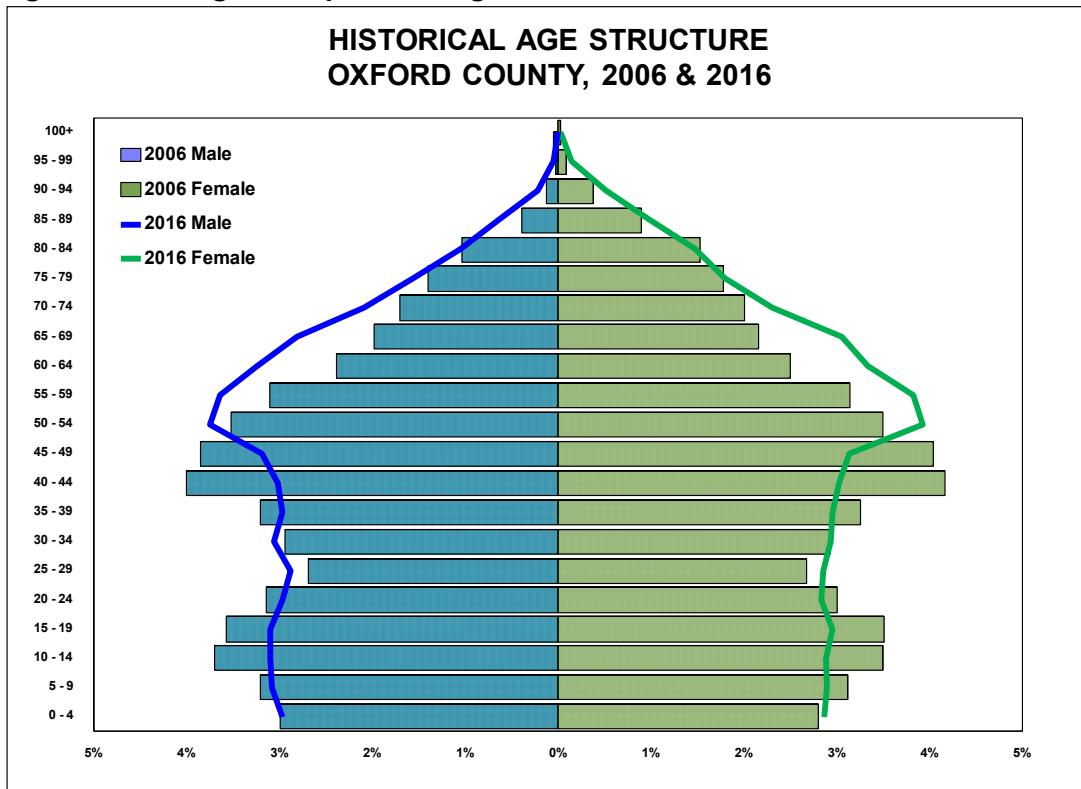
Table 3 - Average Household Size, Oxford County, 2001-2016

Census Year	Persons Per Unit
2001	2.62
2006	2.57
2011	2.50
2016	2.47

Source: Statistics Canada Census data.

Figure 2 illustrates the change in the age structure of the population in Oxford since 2006. The aging demographic trend is anticipated to continue and is a key determining factor when forecasting future growth and change in the County. Within the context of an aging population, the population would stabilize and begin to decline in the absence of in-migration.

Figure 2 - Change in Population Age Structure, 2006 & 2016



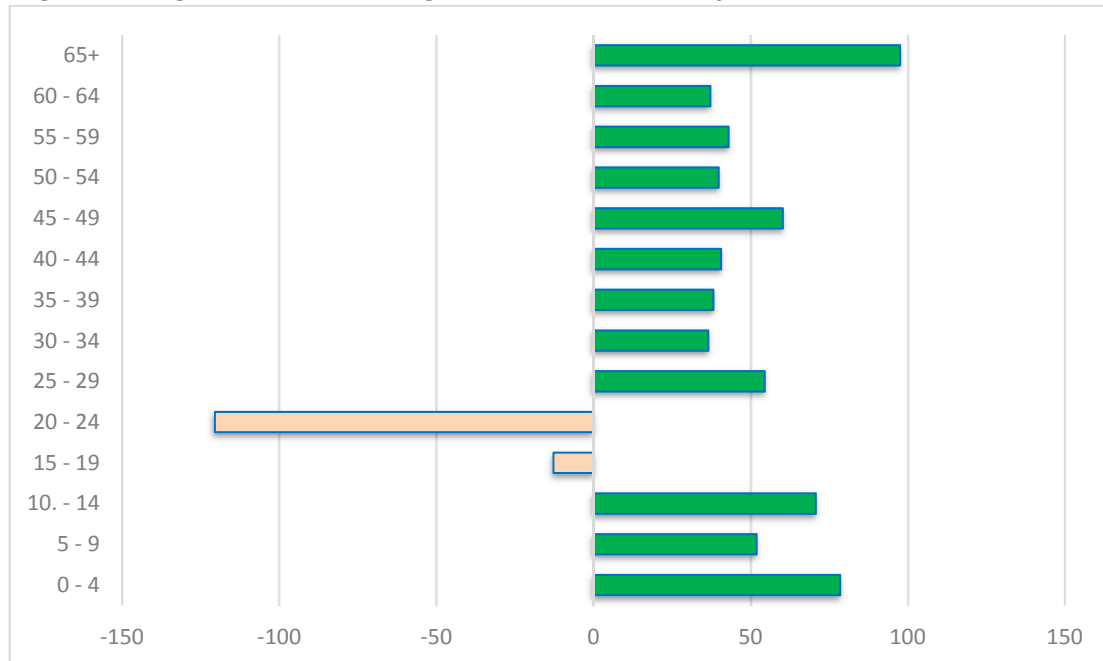
Source: Hemson Consulting Ltd. based on Statistics Canada data.

The age-structure of migrants is also a key consideration in understanding recent growth and change in the County and assessing the future growth outlook. Figure 3 sets out annual net-migrants by age group over the 2006 to 2018 period. As shown,

there is significant out-migration of younger aged adults, who are drawn to education and employment opportunities in larger urban centres. The pattern of some young adults leaving for the “big city” is common throughout the province with the recipient communities largely limited to the GTA, Waterloo Region, Ottawa, London and Windsor.

Oxford also has a relatively large in-migration of seniors compared to many other jurisdictions. This is likely attributable, at least in part, to its significant small town and rural character, relative proximity to a number of larger urban centres, range of services and lower housing costs. .

Figure 3 - Age Structure of Migrants, Oxford County, 2006 to 2018 (annual)



Source: Statistics Canada Census data.

C. HOUSING GROWTH BY UNIT TYPE

Housing in the County is predominately low density ground-oriented units, reflecting the largely rural character of most Oxford communities. As the pattern of overall growth in the County has reinforced long-standing distribution within Oxford, so too has the built form of housing by type. Notwithstanding, Census housing by type counts and residential building permit activity suggests somewhat of an increased proportion of higher density housing types and somewhat fewer single-detached units in recent years (see Tables 4 and 5).

Table 4 - Occupied Households by Unit Type, Oxford County, 2001-2016

Census Year	Singles/Semis	Rows	Apartments	Total
2001	29,610	2,080	5,580	37,270
2006	30,970	2,270	6,080	39,320
2011	32,670	2,520	6,380	41,570
2016	34,510	2,680	7,090	44,280
2001-16	4,900	600	1,510	7,010
Share of Growth	69.9%	8.6%	21.5%	100.0%

Source: Statistics Canada data.

Note: The housing categories shown here combine the following categories: Singles and semi-detached, which include mobiles and other single attached; Rows; and Apartments, which include duplexes and additional residential units.

Table 5 - Residential Building Permits by Unit Type, Oxford County, 2011-2018

Census Year	Singles/Semis	Rows	Apartments	Total
2011-16	2,615	457	813	3,885
Share	67.3%	11.8%	20.9%	100.0%
2017-18	836	206	206	1,248
Share	67.0%	16.5%	16.5%	100.0%

Source: Hemson Consulting Ltd. based on data provided by Oxford County and Statistics Canada.

While the level of residential growth and age composition of Oxford residents, existing and new, has shifted over recent Census periods with continued in-migration to the County, the relative distribution of population and housing has remained generally consistent with historical patterns.

D. DISTRIBUTION OF RECENT RESIDENTIAL GROWTH WITHIN THE COUNTY

Tables 6 to 9 below provide total population and households and associated growth over the 2001 to 2016 period at the Area Municipal level, which indicate past growth trends based on shares of County-wide growth. Most of the residential growth that has continued to occur since 2001 has been concentrated in the three Large Urban Centres in Oxford – Woodstock, Ingersoll and Tillsonburg. The City of Woodstock, being the County's largest urban centre, has accounted for roughly 65% of population growth and more than 50% of growth in households since 2001. Taken together with Tillsonburg, Ingersoll and Norwich, these municipalities accounted for most of the net

growth in population in the County since 2001 and almost 90% of net growth in households. Notwithstanding this significant concentration of population growth within a few municipalities, all Area Municipalities in Oxford added households over the 2001 to 2016 period. Over the same timeframe, some Area Municipalities experienced moderate declines in population. This pattern reinforces the aging population trend, which is generally most pronounced in rural communities further from major urban centres.

Table 6 - Total Population by Area Municipality, 2001-2016

Area Municipality	2001	2006	2011	2016
Woodstock	35,160	37,360	38,810	42,040
Tillsonburg	14,610	15,370	15,730	16,310
Ingersoll	11,410	12,190	12,490	13,110
Blandford-Blenheim	7,500	7,200	7,560	7,600
East Zorra-Tavistock	7,170	7,270	7,030	7,330
Norwich	10,890	10,870	11,020	11,310
South-West Oxford	8,090	7,870	7,750	7,880
Zorra	8,370	8,420	8,280	8,360
Oxford County	103,200	106,550	108,670	113,940

Source: Statistics Canada Annual Demographic Estimates.

Note: Total population including Census net undercoverage.

Table 7 - Occupied Households by Area Municipality, 2001-2016

Area Municipality	2001	2006	2011	2016
Woodstock	13,380	14,530	15,700	17,150
Tillsonburg	5,950	6,380	6,820	7,130
Ingersoll	4,200	4,560	4,780	5,080
Blandford-Blenheim	2,500	2,480	2,620	2,730
East Zorra-Tavistock	2,390	2,450	2,520	2,710
Norwich	3,440	3,480	3,610	3,710
South-West Oxford	2,600	2,590	2,590	2,700
Zorra	2,820	2,890	2,940	3,070
Oxford County	37,280	39,360	41,580	44,280

Table 8 - Total Population Growth by Area Municipality, 2001-2016

Area Municipality	Change				Share of County Wide Growth
	2001-06	2006-11	2011-16	2001-16	2001-16
Woodstock	2,200	1,450	3,230	6,880	64.1%
Tillsonburg	760	360	580	1,700	15.8%
Ingersoll	780	300	620	1,700	15.8%
Blandford-Blenheim	-300	360	40	100	0.9%
East Zorra-Tavistock	100	-240	300	160	1.5%
Norwich	-20	150	290	420	3.9%
South-West Oxford	-220	-120	130	-210	-2.0%
Zorra	50	-140	80	-10	-0.1%
Oxford County	3,350	2,120	5,270	10,740	100.0%

Source: Statistics Canada data.

Table 9 - Occupied Household Growth by Area Municipality, 2001-2016

Area Municipality	Change				Share of County Wide Growth
	2001-06	2006-11	2011-16	2001-16	2001-16
Woodstock	1,150	1,170	1,450	3,770	53.9%
Tillsonburg	430	440	310	1,180	16.9%
Ingersoll	360	220	300	880	12.6%
Blandford-Blenheim	-20	140	110	230	3.3%
East Zorra-Tavistock	60	70	190	320	4.6%
Norwich	40	130	100	270	3.9%
South-West Oxford	-10	0	110	100	1.4%
Zorra	70	50	130	250	3.6%
Oxford County	2,080	2,220	2,700	7,000	100.0%

Source: Statistics Canada data.

III EMPLOYMENT GROWTH AND SHIFTS IN ECONOMIC BASE

This section examines the growth and change that has occurred in Oxford's employment base since 2001 (the starting point for reporting Census data in this document). The County continued to experience employment growth over that period. The distribution of this growth has varied within the County amidst shifts in the broader economy. Employment in Oxford has also been variable over recent Census periods, amidst recession and a shifting economy. This section looks at different aspects of economic activity in the County, including:

- Place of Work data, which provides the overall number of jobs in the County at each Census period, an indicator of economic growth or decline. Data on Place of Work employment reports the number of jobs in an area, irrespective of where the employee resides.
- Change in employment by North American Industry Classification System (NAICS) which indicates any sectoral shifts in the Oxford economy.
- Information on Resident Employed Labour Force, and commuting patterns, which indicates where employed Oxford residents work, and changes in the size of the Regional labour pool.
- Activity rate, which refers to the proportion of employed residents relative to the population.

A. OVERALL JOB GROWTH IN EACH CENSUS PERIOD SINCE 2001

The County continued to grow in jobs during each Census period since 2001. However, growth between 2006 and 2011 was much more modest relative to the prior period, as shown in Table 10 below. The slower growth was due in large part to the recession of 2008 – 2009, when manufacturing was particularly hard-hit by job losses.

Table 10 - Place of Work Employment, Oxford County, 2001-2016

Census Year	Employment	Change	Compound Annual Growth Rate	Activity Rate
2001	48,080			48.4%
2006	52,920	4,840	1.9%	51.5%
2011	53,140	220	0.1%	50.3%
2016	57,330	4,190	1.5%	51.7%

Source: Statistics Canada special run data.

In the context of broad economic shifts across Ontario, in particular a shift away from traditional manufacturing and goods-producing industries to a more service-based economy, overall job growth in Oxford involved job decline in some economic sectors offset by rapid growth in others. The County's economic base has remained relatively stable, focussed on manufacturing, transportation and warehousing, trade and administrative sectors accounting for more than 60% of the employment base since 2001 (in 2016, these sectors represented 36%, 13% and 13% respectively). Primary industries (including agriculture and resource based) which comprise much of the rural-based employment in the County declined from 11% of Oxford's employment base in 2001 to 7% in 2016³.

Changes in employment by sector [North American Industry Classification System (NAICS)] since 2001 is illustrated in Figure 4 below, highlighting recent shifts in the Oxford economic base.

³ Based on Statistics Canada North American Industry Classification data.

Figure 4 - Change in Employment by NAICS, 2001-2016

Source: Statistics Canada Census data.

At the County level, Oxford's continued employment growth since 2001 compares favourably with other municipalities in southwestern Ontario, where manufacturing has historically represented a major part of the employment base. The job recovery after the 2008-2009 recession was striking and included growth by 21% in the industrial sectors. This was the highest industrial job growth of any County or Region in Ontario (Essex (Windsor) posted the next highest growth rate at 17%). Nearly all of the 2011-2016 job growth was in transportation equipment manufacturing; that is, in the County's three automotive assembly plants, as well as many parts manufacturers and suppliers.

B. EMPLOYMENT GROWTH WITHIN OXFORD AREA MUNICIPALITIES

While the amount and type of employment has been variable in recent years so too has the distribution of growth within the County. At the Area Municipal level, employment growth was distributed unevenly within Oxford and focussed on longstanding job centres. Table 12 highlights net change in Place of Work Employment and respective shares of County growth by Area Municipality from 2001 to 2016.

As with population and housing growth, the largest share of net employment growth in Oxford was in Woodstock. Ingersoll and South-West Oxford also experienced significant growth over this time frame relative to the balance of Area Municipalities.

Many municipalities in Oxford declined in employment, especially during the 2006 to 2011 timeframe, when much of the manufacturing base in Ontario similarly declined. Woodstock was the exception, which continued to add significant employment over all three Census periods. This resiliency in the local economic market during the recession and decline through much of Southwestern Ontario was in largest part owing to the opening of the Toyota plant in 2008. The large growth in Ingersoll and South-West Oxford over the period is primarily driven by the General Motors (GM) CAMI automotive plant and the associated transportation and warehousing uses located to the west of that plant.

In the rural communities in the County, the cyclical changes are partly related to the economic cycles but may also be statistical. In particular, the National Household Survey (which replaced the long-form Census in 2011, only was completed on a voluntary basis – unlike the mandatory Censuses of prior periods and since) had a much lower response rate in rural than urban communities. In these communities, it is probably best to focus on the longer term trends than to draw significant conclusions from a single Census period.

In both urban and rural areas, growth in population-serving employment continues through economic cycles, as there is continued demand for these types of jobs to meet the needs of residents. Growth in population-related employment tends to grow in line with population growth. Rural-based employment also represents an important part of the economic base within Oxford, particularly agriculture.

Tables 11 and 12 indicate change in total Place of Work⁴ employment (the number of jobs in the community, irrespective of where the employee resides), from 2001 to 2016, County-wide and by Area Municipality.

⁴ Includes work at home and no fixed place of work.

Table 11 - Place of Work Employment by Area Municipality, 2001-2016

Area Municipality	2001	2006	2011	2016
Woodstock	17,130	19,950	23,040	25,430
Tillsonburg	9,570	10,080	7,840	8,580
Ingersoll	7,820	8,890	8,700	8,990
Blandford-Blenheim	2,340	2,300	2,360	1,820
East Zorra-Tavistock	2,730	2,460	2,400	2,800
Norwich	3,860	3,840	3,470	4,050
South-West Oxford	1,780	2,480	2,290	2,850
Zorra	2,860	2,910	3,050	2,800
Oxford County	48,090	52,910	53,150	57,320

Source: Statistics Canada special run data.

Table 12 - Place of Work Employment Growth by Area Municipality, 2001-2016

Area Municipality	Change				Share of County Wide Growth
	2001-06	2006-11	2011-16	2001-16	2001-16
Woodstock	2,820	3,090	2,390	8,300	89.9%
Tillsonburg	510	-2,240	740	-990	-10.7%
Ingersoll	1,070	-190	290	1,170	12.7%
Blandford-Blenheim	-40	60	-540	-520	-5.6%
East Zorra-Tavistock	-270	-60	400	70	0.8%
Norwich	-20	-370	580	190	2.1%
South-West Oxford	700	-190	560	1,070	11.6%
Zorra	50	140	-250	-60	-0.7%
Oxford County	4,820	240	4,170	9,230	100.0%

Source: Statistics Canada special run data.

Tables 13 and 14 indicate change in total Resident Employed Labour Force over the same time frame, which refers to the number of residents within a community that are employed, irrespective of where the job is located. For most Area Municipalities, labour force participation has grown with population over the last three Census periods. The relationship between residents and place of work is also highlighted by commuting patterns, as discussed below.

Table 13 - Resident Employed Labour Force by Area Municipality, 2001-2016

Area Municipality	2001	2006	2011	2016
Woodstock	15,930	17,810	18,105	20,290
Tillsonburg	6,350	6,965	6,630	6,895
Ingersoll	5,330	6,275	6,205	6,605
Blandford-Blenheim	4,320	4,150	4,345	4,285
East Zorra-Tavistock	3,875	3,955	3,730	4,010
Norwich	5,240	5,470	5,510	5,790
South-West Oxford	4,265	4,300	4,060	4,155
Zorra	4,385	4,785	4,680	4,640
Oxford County	49,695	53,710	53,265	56,670

Source: Statistics Canada Census data.

Table 14 - Resident Employed Labour Force Growth by Area Municipality, 2001-2016

Area Municipality	Change				Share of County Wide Growth
	2001-06	2006-11	2011-16	2001-16	2001-16
Woodstock	1,880	295	2,185	4,360	62.5%
Tillsonburg	615	-335	265	545	7.8%
Ingersoll	945	-70	400	1,275	18.3%
Blandford-Blenheim	-170	195	-60	-35	-0.5%
East Zorra-Tavistock	80	-225	280	135	1.9%
Norwich	230	40	280	550	7.9%
South-West Oxford	35	-240	95	-110	-1.6%
Zorra	400	-105	-40	255	3.7%
Oxford County	4,015	-445	3,405	6,975	100.0%

Source: Statistics Canada Census data.

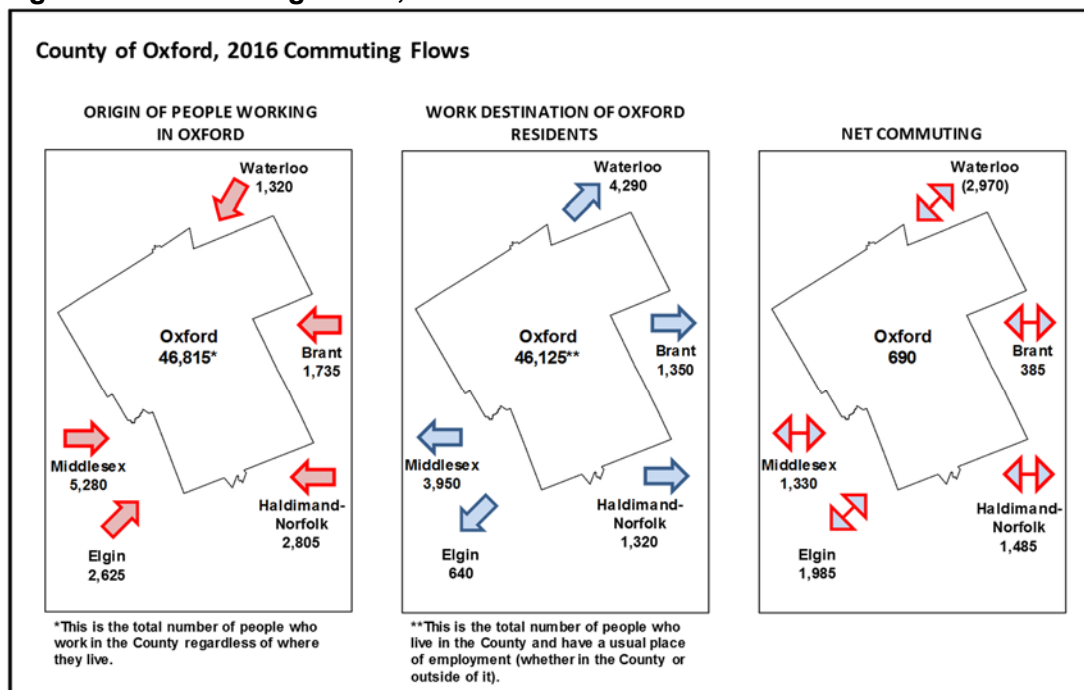
The role of Oxford within the broader economic region is another key consideration in assessing the future growth outlook of the County. Figure 5 illustrates the major flows of commuters into and out of the County and neighbouring upper-tier municipal Census Divisions (CD). In this regard, it is noted that the Haldimand-Norfolk CD comprises the two upper-tier municipalities).

The County provides employment opportunities to residents within and beyond its borders, with net in-commuting of 700 employees in 2016 (i.e. was a net provider of jobs). The largest flows (into and out) are between Oxford County and Middlesex. The Region of Waterloo is the only adjacent municipality to which Oxford experiences net out-commuting, mainly to the urban centres of Kitchener, Waterloo and Cambridge.

Of Oxford's 46,000 employed residents that commuted to work in 2016 (note: this figure does not include those who work at home or have no fixed workplace address),

more than 60% lived and worked in the County. The largest internal commuting flows are to Woodstock and Ingersoll, largely to the Toyota and GM CAMI plants; and to Tillsonburg⁵. Large manufacturing employers attract employees from a wide area because these types of jobs do not exist in all communities. This is unlike, for example, retail where there is little need for commuting because there are jobs of this type in most communities. For example, in Ingersoll, the resident labour force in manufacturing industries in 2016 was 1,735, while manufacturing employment was 4,250 (a large portion in CAMI). This indicates that most manufacturing employees commute to work in Ingersoll (i.e. do not reside in the Town). Retail, on the other hand, had 715 in the resident labour force and 750 jobs in the community, indicating approximate balance on a net basis.

Figure 5 - Commuting Flows, 2016



Source: Hemson Consulting Ltd. based on Statistics Canada Place of Work and Resident Employment Labour Force data. The graphic illustrates the most significant flows of commuters into and out of the County. 31,100 Oxford residents both live and work within the County. Note: Work at home employment and no fixed place of work employment are excluded from the above figures.

⁵ Commuting flows by Area Municipality are based on Statistics Canada special run data about Place of Work employment and Place of Residence labour force data.

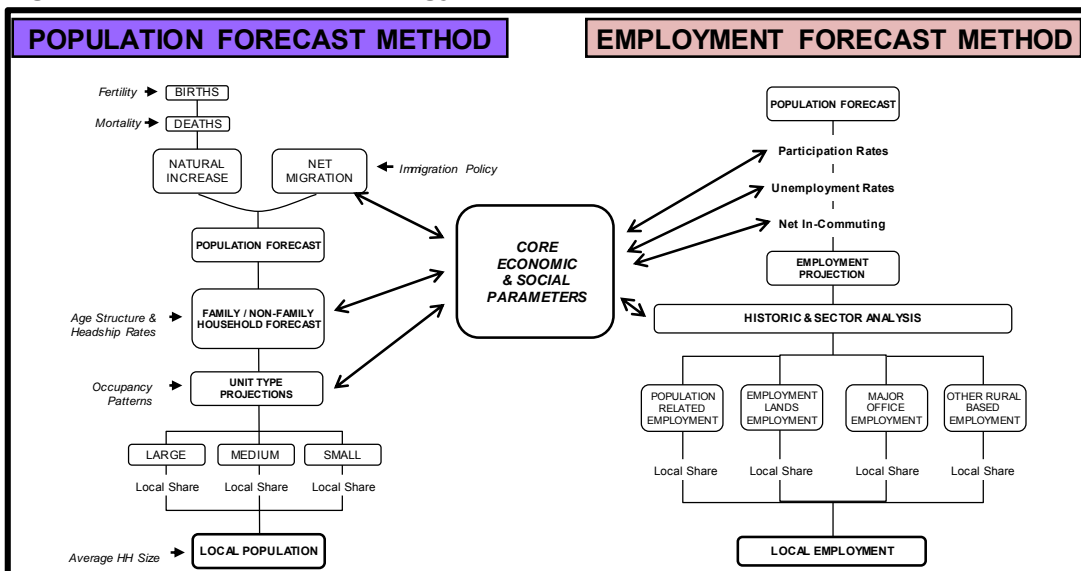
IV COUNTY-WIDE GROWTH FORECASTS

This section sets out the method and key assumptions that were used in the Oxford County forecast and provides the results of the population, household and employment forecasts by five year Census intervals, from a 2016 base to 2046. The forecasts for Oxford are based on analysis of local conditions, longer term trends and recent growth and change within Oxford considered within the larger context of trends influencing growth and change across the economic region. The forecasts incorporate all currently available data on existing development, population and employment in the County. The forecasts are based on the well-established forecast models used by Hemson in the past, including the forecasts prepared for the Province’s *Growth Plan for the Greater Golden Horseshoe* in 2006 and 2013.

A. FORECAST METHOD AND ASSUMPTIONS

The forecasts of population, households and employment at the County level are based upon the well-established standard cohort-survival forecast model. The forecast method is illustrated in Figure 6 below.

Figure 6 - Forecast Methodology



Source: Hemson Consulting Ltd.

The approach begins by forecasting population, housing and employment for Oxford based on national and provincial economic and demographic trends. The results of the County forecast are then distributed to Area Municipalities within Oxford by applying shares of County-wide housing growth, and taking into account a range of local demographic, economic, development and supply factors at the local level.

The County-wide forecasts are prepared by applying a set of principal assumptions within the forecast model related to Ontario's economic future and its social context. This set of core economic and social parameters include: the broader outlook and composition of the Ontario economy; migration and settlement patterns, such as national immigration policies and increasing concentration in urban centres; demographic change, such as aging of the population; and economic change, such as automation in manufacturing. The forecasts of Oxford's population, household and employment growth begin with these core economic and social parameters.

The current broad economic and demographic trends are expected to continue over the forecast horizon. The Ontario economy is expected to continue to grow at a moderate pace over the coming decades, consistent with average rates of growth over recent decades. This growth will occur within the context of a continued small shift towards population-related employment in a more service-sector-based economy, owing to higher levels of population growth and the transition in the broader Ontario economy to services. At the same time, in Oxford, employment land employment, particularly manufacturing and transportation and distribution, is expected to continue to represent a significant share of the employment base.

Migration has come to represent the largest share of population growth throughout Ontario; levels of natural increase continue to decline and in many areas are now negative. This is due to the decrease in fertility rates and the general aging of the population. However, the baby boom echo (millennial) population is now entering its peak child-bearing years, so there will be a significant number of births as the "echo-echo" generation is born. Once that is complete, there is little natural increase likely in most populations.

Growth in Oxford will continue to be largely dependent on intra-provincial migration and will be most greatly influenced by the County's proximity to the rapidly growing GGH urban region and adjacency to Waterloo Region. Growth in the GGH has also been influencing change in the London area, from which Oxford is experiencing growth from the west. While concentrated in Woodstock, most of Oxford's Area Municipalities have shared in growth driven by migration from these areas and this is expected to continue and increase over the forecast horizon, particularly as rapid growth in the

GGH continues to press its influence outward. A range of housing affordability, lifestyle (particularly for retirees), employment opportunities and other factors also come into play.

By the 2030s, due to the aging demographic and fertility rates below replacement, Oxford's population would decline without net in-migration. The natural decrease in the base population will, in part, counterbalance the population growth generated by in-migrants seeking new housing.

While Oxford is likely to continue to experience the out-migration of some young adults, it will be balanced by in-migration of that age group from other areas and by a large net in-migration of those in their 30s and 40s, seeking (mostly) family-oriented housing. Again, growth in the County will be largely driven by Oxford's location in the area of influence of the rapidly growing urban centres of the GGH and its adjacency to Kitchener-Waterloo. The County is expected to experience increased net in-migration over the forecast period relative to historical levels.

The forecast results which follow represent a best estimate of future growth and change based on the most current available data and assumptions about past and future economic and demographic conditions. Given an inherent uncertainty in long-term demographic and economic forecasting, regular reviews are prudent and it is recommended that the forecasts be revisited approximately every five years, generally following the release of the Census. The forecasts are prepared by five-year intervals corresponding with the Census from a 2016 base to a 2046 horizon.

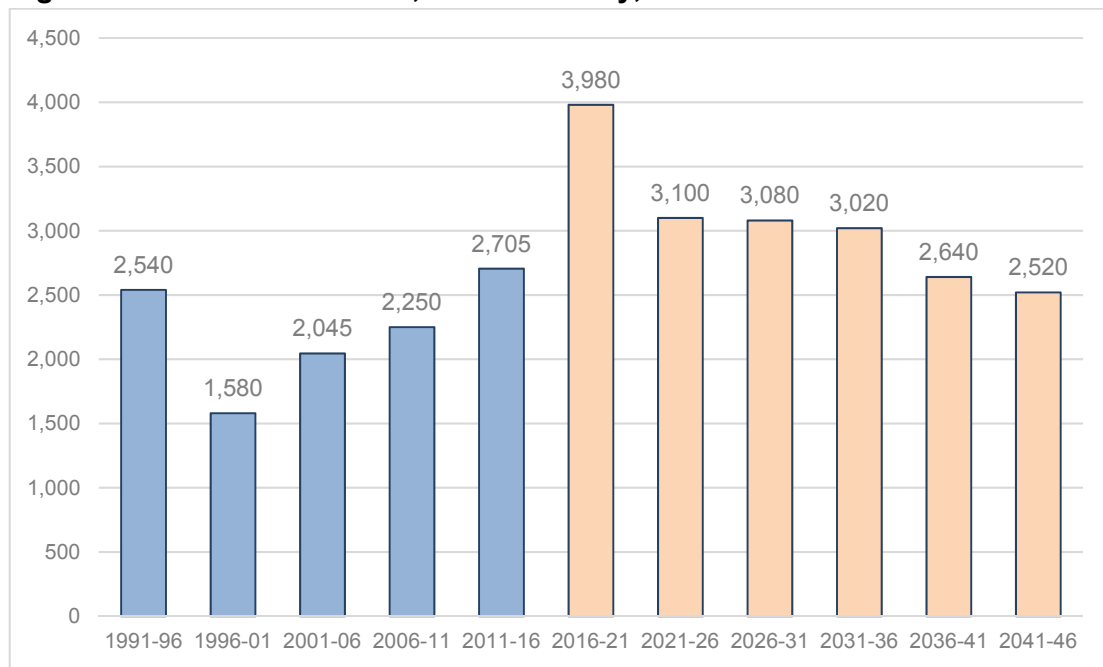
The growth outlook for households and employment for the 2019 to 2039 timeframe is also identified, based on the Area Municipal allocations presented in the next section of this report, in order to identify growth for the current twenty-year planning period and associated land need in accordance with PPS policy.

B. RESIDENTIAL GROWTH TO 2046

The County is forecast to grow to 161,000 in total population and 62,000 households by 2046, representing growth of 47,200 residents and 18,300 households from a 2016 base. The forecast of residential growth is based on continued in-migration, at somewhat higher levels than in the past but cognizant of more recent levels of housing growth. The forecasts reflect an expectation that the role of the County within Southwestern Ontario and its adjacency to the GGH will continue to positively influence residential demand in Oxford going forward, in particular relative to its historical trends.

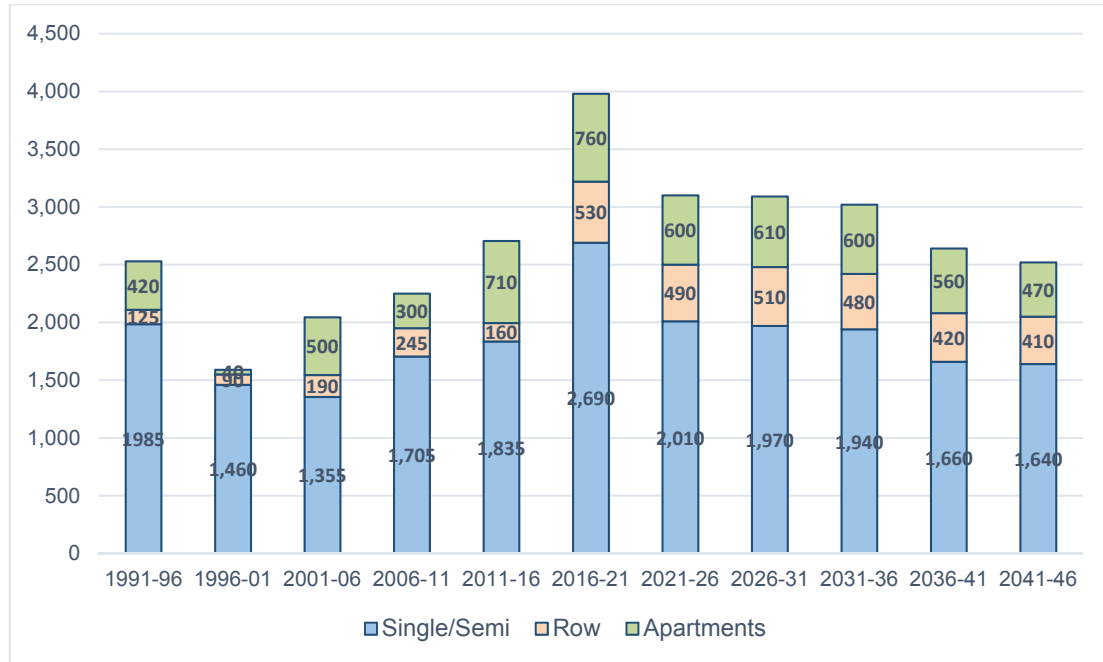
The forecast is for higher than historical trends, particularly in the shorter term horizon, however forecasts assume recent high growth will moderate somewhat over the longer term outlook, due to housing market cycles and recognition that the recent very high growth period may moderate over time and unforeseen market shifts may occur. Figure 7 through 10 below illustrate how the residential forecasts to 2041 compare with the longer-term historical trends in the County and indicate the historical and forecast breakdown of housing by unit type and the components of population growth through natural increase and net in-migration.

Figure 7 - Household Growth, Oxford County, 1991-2046



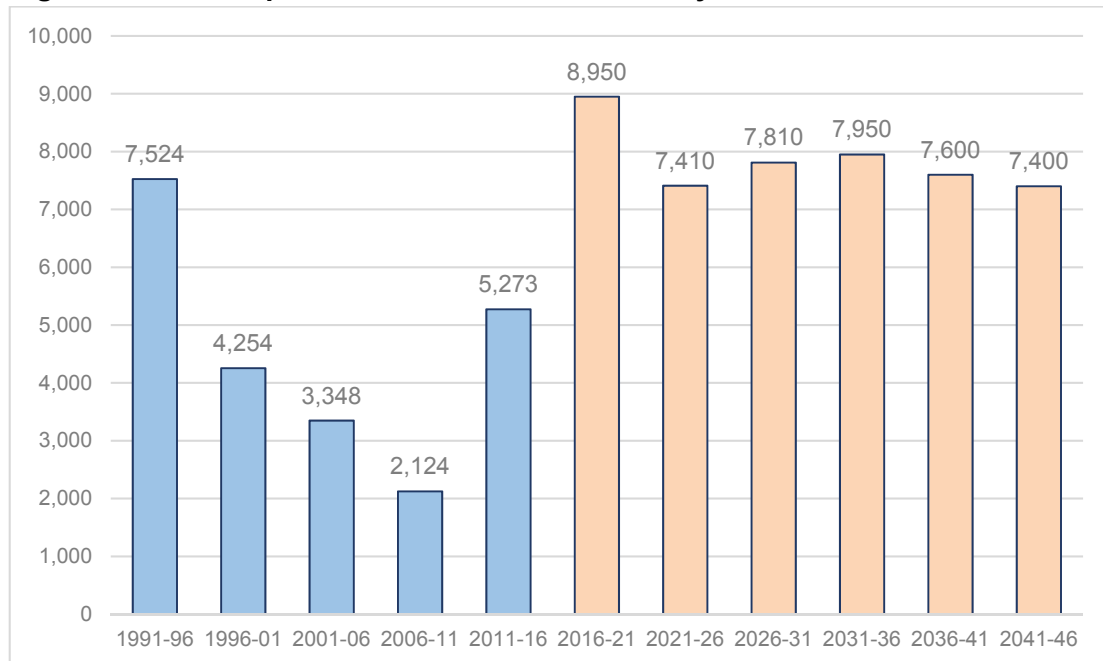
Source: Hemson Consulting Ltd., based on Statistics Canada data.

Figure 8 - Housing Growth by Unit Type, Oxford County, 1991-2046



Source: Hemson Consulting Ltd., based on Statistics Canada data.

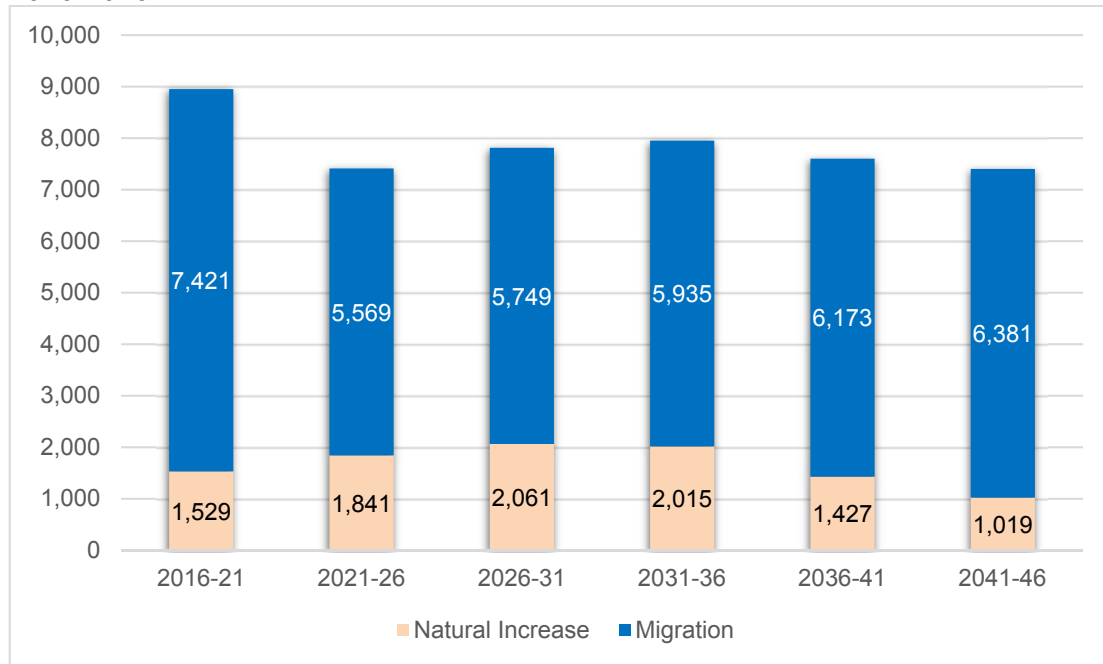
Figure 9 - Total Population Growth, Oxford County, 1991-2046



Source: Hemson Consulting Ltd., based on Statistics Canada data.

Note: Total population including Census net undercoverage

Figure 10 - In-Migration & Natural Increase Population Growth, Oxford County, 2016-2046



Source: Hemson Consulting Ltd., based on Statistics Canada data.

The results of the County-wide forecasts of total population, migration, households, housing by type and average household size, or persons per unit (ppu) are provided below (Tables 15-18). The rate of household growth is anticipated to continue to outpace the rate in growth of population over time, as the population continues to age, affecting housing size and demand, for the reasons described earlier.

Table 15 - Population and Net In-Migration, Oxford County, 2016-2046

Census Year	Census Population	Change	Total Population	Change	Net In-Migration
2016	110,860		113,940		3,700
2021	119,560	8,700	122,890	8,840	6,900
2026	126,780	7,220	130,310	7,420	5,110
2031	134,380	7,600	138,120	7,810	5,280
2036	142,110	7,730	146,070	7,950	5,460
2041	149,500	7,390	153,660	7,590	5,690
2046	156,700	7,200	161,060	7,400	5,890
2016-46		45,840		47,110	

Source: Hemson Consulting Ltd. based on Statistics Canada data.

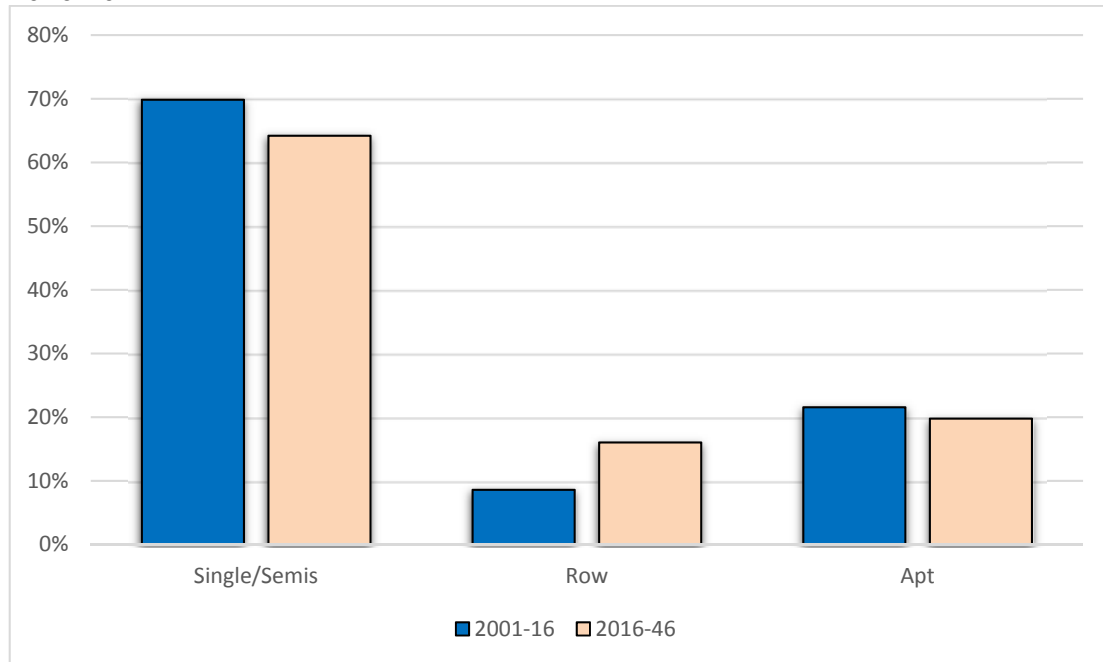
Table 16 - Occupied Household Growth, Oxford County, 2016-2046

Census Year	Households	Change	Compound Annual Growth Rate
2016	44,270		
2021	48,250	3,980	1.7%
2026	51,350	3,100	1.3%
2031	54,430	3,080	1.2%
2036	57,450	3,020	1.1%
2041	60,100	2,650	0.9%
2046	62,620	2,520	0.8%
2016-46		18,350	

Source: Hemson Consulting Ltd., based on Statistics Canada data.

Housing growth in the County is still expected to be dominated by lower-density housing forms, consistent with the current character of Oxford communities, however, a very moderate shift to a greater proportion of higher density units is forecast, characterized by a marginally smaller proportion of single and semi-detached units and a greater share of rowhouse units in the overall housing growth relative to the past (as shown in Figure 11 below) owing to demographic, economic and planning policy drivers. There is also expected to be a slight decline in the relative share of apartment growth, with apartments forecasted to account for 20% of the County-wide unit growth over the planning period from 2016 to 2046.

Figure 11 - Shares of Housing Growth by Unit Type, Oxford County, 2001-2016; 2016-2041



Source: Hemson Consulting Ltd., based on Statistics Canada data.

Table 17 - Occupied Household by Unit Type, Oxford County, 2016-2046

Census Year	Single/Semis	Rows	Apartments	Total
2016	34,510	2,680	7,090	44,280
2021	37,200	3,210	7,850	48,260
2026	39,210	3,700	8,450	51,360
2031	41,180	4,200	9,050	54,430
2036	43,120	4,680	9,660	57,460
2041	44,780	5,090	10,220	60,090
2046	46,420	5,510	10,690	62,620
2016-46	11,910	2,830	3,600	18,340
Share of Growth	64.9%	15.4%	19.6%	100.0%

Source: Hemson Consulting Ltd., based on Statistics Canada data.

Table 18 - Average Household Size by Unit Type, Oxford County, 2001-2046

Census Year	Single/Semis	Rows	Apartments	Total
2001	2.80	2.76	1.59	2.62
2006	2.76	2.39	1.63	2.57
2011	2.71	2.23	1.57	2.50
2016	2.66	2.27	1.58	2.47
2021	2.64	2.25	1.57	2.44
2026	2.63	2.25	1.56	2.43
2031	2.64	2.25	1.57	2.43
2036	2.65	2.26	1.57	2.44
2041	2.67	2.28	1.58	2.45
2046	2.68	2.29	1.59	2.46

Source: Hemson Consulting Ltd., based on Statistics Canada data.

C. EMPLOYMENT GROWTH TO 2046

Employment growth is expected to continue over the forecast horizon with the County anticipated to grow to an employment base of 78,300 in total place of work employment to 2046, representing growth of 21,000 jobs over the forecast horizon from a 2016 base.

Table 19 - Place of Work Employment, Oxford County, 2016-2046

Census Year	Employment	Change	Compound Annual Growth Rate	Activity Rate
2016	57,330			51.7%
2021	62,080	4,750	1.6%	51.9%
2026	64,570	2,490	0.8%	50.9%
2031	67,170	2,600	0.8%	50.0%
2036	70,400	3,230	0.9%	49.5%
2041	74,110	3,710	1.0%	49.6%
2046	78,390	4,280	1.1%	50.0%
2016-46		21,060		

Source: Hemson Consulting Ltd., based on Statistics Canada data.

The employment forecast is divided into three land-use-based categories:

- Population-related Employment, which is employment that primarily serves a resident population and includes retail, food services, education, healthcare, and local government. This generally grows in line with population growth and is primarily located on land in a range of commercial and community area designations, however a small amount also occurs on industrial lands.

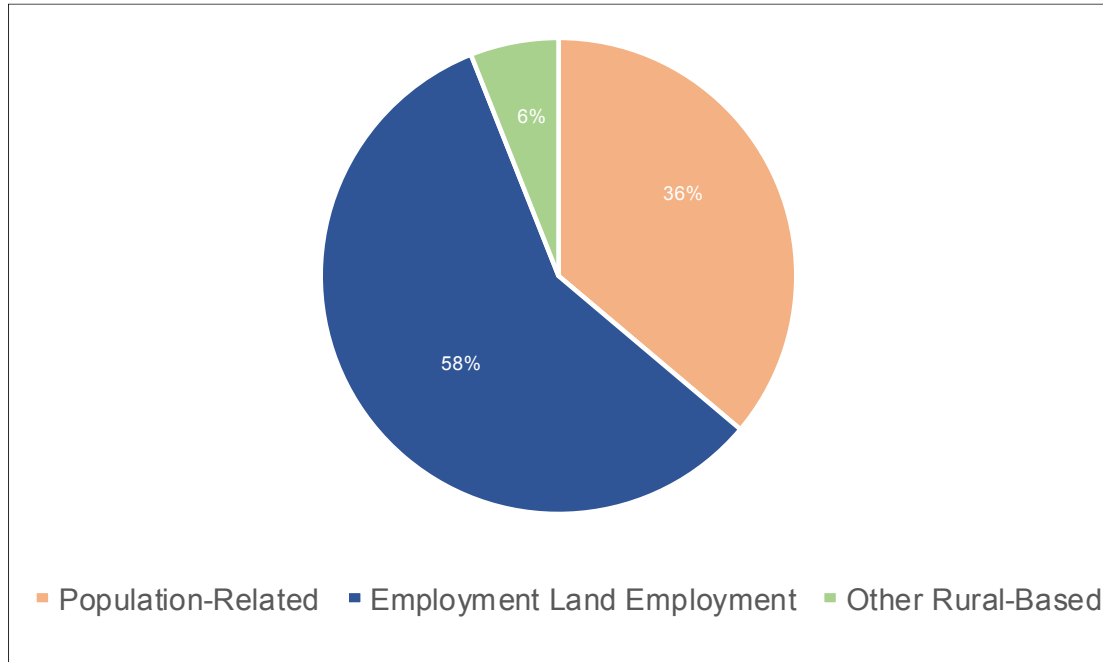
- Employment-land Employment, which refers to traditional industrial-type employment primarily accommodated in low-rise industrial buildings in business parks and employment areas. This is the type of employment that would locate on designated industrial lands.
- Rural-based Employment, which refers to jobs scattered throughout the rural area, predominantly consists of agricultural and primary industries. Within Oxford, this category includes most of the agricultural and resource employment, a small amount of utilities and construction related employment and a negligible share of population-serving employment. This type of employment does not generally locate in settlement areas, however a small amount could.

Table 20 and Figure 12 below indicate the results of the forecasts of employment by type and the relative proportions of employment by land use category in Oxford at the 2046 horizon.

Table 20 - Place of Work Employment Forecast by Land Use Category, Oxford County, 2016-2046

Census Year	Population Related	Employment Land	Rural Based	Total
2016	20,100	33,130	4,090	57,320
2021	21,940	35,920	4,220	62,080
2026	22,840	37,470	4,260	64,570
2031	23,910	38,960	4,300	67,170
2036	25,290	40,750	4,360	70,400
2041	26,790	42,870	4,450	74,110
2046	28,490	45,350	4,550	78,390
2016-46	8,390	12,220	460	21,070
Share of Growth	39.8%	58.0%	2.2%	100.0%

Source: Hemson Consulting Ltd., based on Statistics Canada data.

Figure 12 - Proportion of Oxford County Employment by Type, 2046

Source: Hemson Consulting Ltd., based on Statistics Canada data.

The general relationship between employment types is expected to continue, with most growth being in employment land employment, reflecting the County's largely industrial centred economy. Oxford is anticipated to continue to maintain a large proportion of employment land employment, particularly relative to other parts of the province where the shift to service-based sectors in the broader Ontario economy has been more pronounced. Population-related employment represents a large proportion of the County's employment growth, serving the growing population. Rural-based employment, while marginal in relation to the other categories in terms of overall employment or job growth, is still an important component of the economic base in the County, including primary industries and agricultural activities.

The next section provides the results of the forecast distribution of County-wide forecast growth in population, households and employment to Area Municipalities in Oxford.

V AREA MUNICIPAL GROWTH FORECASTS

Further analysis was undertaken to determine the proportion of County-wide growth that is forecasted to occur in each of the Area Municipalities within Oxford. S.1.2.4 of the PPS requires that the County, as an upper-tier planning authority, identify and allocate population, housing and employment projections for lower-tier municipalities. This distribution of growth to the Area Municipalities provides a basis for managing growth and assessing land need within the County's serviced settlement areas to ensure the expected residential and employment growth is accommodated in a manner consistent with Provincial policy.

This section provides the results of forecast housing, population and employment growth by Area Municipality. The forecasts are based on recent and longer-term trends as well as expectations about future employment in the broader region and County.

A. AREA MUNICIPAL FORECASTS

Population, housing and employment growth forecasts are developed for the Area Municipalities based on historical and anticipated development patterns and a range of other demographic and economic considerations. Share of County-wide forecast household growth in turn drives the population growth outlook.

The distribution of forecasted growth within Oxford was undertaken giving consideration to a range of factors including provincial and County growth management policy, patterns of historic growth and recent development trends, land supply and servicing capacities and consultation with County Planning and Area Municipal staff. Consistent with Provincial planning policy, the vast majority of growth is directed to fully serviced settlement areas. All Area Municipalities are anticipated to experience growth in population, households and employment over the forecast period.

1. Provincial and County Policy Directs Growth to Urban Centres and Serviced Villages

The distribution of growth within the County and Area Municipalities must be consistent with PPS policies as implemented through the Official Plan. As such, growth and development is primarily directed to settlements that are served by municipal water and wastewater and contain a broad range and mix of housing, employment and public services. In Oxford, these settlements are designated as 'Large Urban Centres' and

'Serviced Villages' in the Official Plan. Section 2.1.1 of the *Oxford County Official Plan* also provides direction for accommodating growth through intensification within these settlements.

2. Serviced Settlement Areas

Consistent with the PPS and the County Official Plan, the majority of forecast population and employment growth within the County's five Townships is to be accommodated within fully serviced settlement areas (e.g. Serviced Villages). Figure 13 summarizes the structure of Oxford's communities, including the three Large Urban Centres and the Serviced Villages and Villages (un-serviced and partially serviced) in each Township. Most of the forecasted growth for each Township is generally expected to occur within the Serviced Villages with existing available land supply and servicing capacity to accommodate growth.

This report provides growth forecast results to an Area Municipal level. However, background analyses, land supply review and update and consultation with County Planning and Area Municipal staff undertaken as part of the study also considers and will help to inform more localized distribution of growth in the Serviced Villages.

Figure 13 – Community Structure, Oxford County

Area Municipality	Community Type	Serviced Villages	Villages*
Woodstock	Large Urban Centre		
Tillsonburg	Large Urban Centre		
Ingersoll	Large Urban Centre		
Blandford-Blenheim	Rural Township	Drumbo Plattsville	Bright Princeton
East Zorra-Tavistock	Rural Township	Innerkip Tavistock	Hickson
Norwich	Rural Township	Norwich Village	Burgessville Springford Otterville Oxford Centre
South-West Oxford	Rural Township	Mt. Elgin Sweaburg	Beachville Brownsville Salford
Zorra	Rural Township	Embro Thamesford	Harrington Kintore

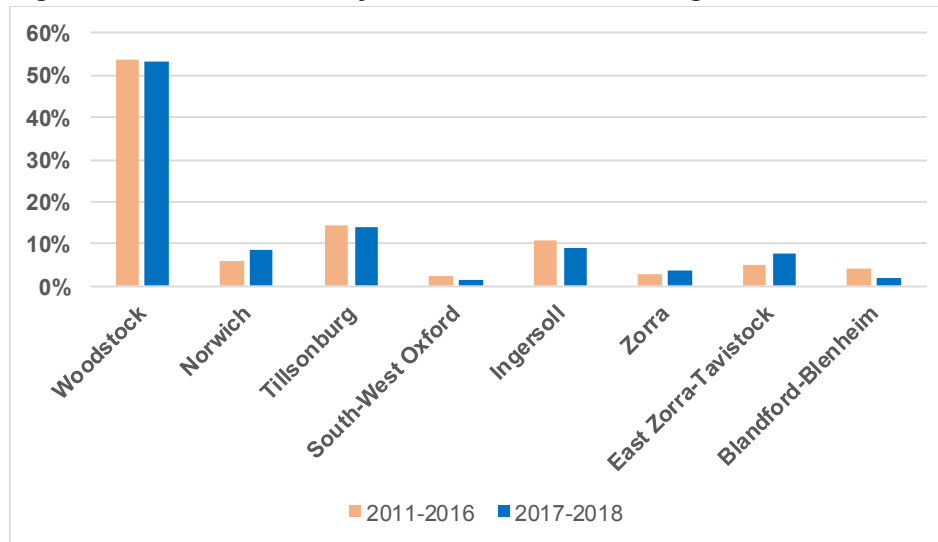
*Unserviced or partially serviced

A range of factors influence the planned distribution of growth at the serviced settlement area level including Provincial and County policy direction, local priorities for growth, land supply, servicing capacity, proximity to other centres, and access to public facilities and other services. The intent of which is to ensure that growth is directed in a manner that: makes efficient use of existing land supply and existing and planned infrastructure and public services; protects agricultural lands and natural resources; and minimizes the need for settlement area boundary, infrastructure and public service facility expansions. Where this study identifies a potential land need for a particular Area Municipality, these factors can be further evaluated through a Phase II study.

3. Recent Residential and Industrial Development Activity within Oxford Area Municipalities

Figure 14 below illustrates shares of recent residential building permits.

Figure 14 - Shares of County-wide Residential Building Permits, 2011-2016; 2017-2018



Source: Hemson Consulting Ltd., based on Statistics Canada data.

The residential development in recent periods reinforces the longer-term pattern of growth in the County. Most residential growth continues to be concentrated in the City of Woodstock, more moderate growth in the Towns of Ingersoll and Tillsonburg and the balance of modest growth throughout the five Townships.

The pattern of industrial investment in recent years has been more variable. Notably, the City of Woodstock experienced a significant increase in industrial building permit value over the most recent Census period. The Townships of Zorra and East Zorra-

Tavistock both had a moderate increase in relative shares of County-wide industrial investment more recently. Other areas in the County either remained stable, or declined, in terms of relative share.

B. AREA MUNICIPAL GROWTH TO 2046

Historical and recent development patterns in the County are generally anticipated to continue. As such, roughly half of County-wide residential and employment growth over the 2016 to 2046 horizon has been allocated to the City of Woodstock, being the largest urban centre in the County and where most future housing demand and job growth is expected to continue to be focused. The Towns of Ingersoll and Tillsonburg are also anticipated to experience substantial continued demand going forward, accounting for nearly 25% of the household and total employment growth forecast. The 25% balance has been allocated throughout the Townships, with Serviced Villages being the settlement areas where the vast majority of growth in the rural Area Municipalities is expected to occur.

Table 21 provides the shares of forecasted County-wide housing growth by Area Municipality. Tables 22 through 27 which follow provide the forecast results by Area Municipality at five-year intervals corresponding with the Census, including:

- Total occupied households;
- Total population including Census net undercoverage
- Total place of work employment; and
- Employment by land-use based category.

Forecast Area Municipal housing growth by unit type and persons per unit (ppu) forecasts, by Area Municipality, are provided in Appendix A.

Table 21 - Share of County Growth to 2046

Area Municipality	Growth
Woodstock	51%
Tillsonburg	13%
Ingersoll	12%
Blandford-Blenheim	4%
East Zorra-Tavistock	7%
Norwich	6%
South-West Oxford	3%
Zorra	3%
Oxford County	100%

Source: Hemson Consulting Ltd., based on Statistics Canada data.

Table 22 - Household Forecast by Area Municipality, 2016-2046

Area Municipality	2016	2021	2026	2031	2036	2041	2046	2016-46
Woodstock	17,150	19,140	20,750	22,330	23,870	25,220	26,510	9,360
Tillsonburg	7,130	7,640	8,050	8,450	8,850	9,200	9,540	2,410
Ingersoll	5,080	5,580	5,950	6,320	6,690	7,020	7,330	2,250
Blandford-Blenheim	2,730	2,890	3,010	3,140	3,270	3,380	3,490	760
East Zorra-Tavistock	2,710	2,990	3,210	3,440	3,660	3,840	4,020	1,310
Norwich	3,710	3,940	4,120	4,300	4,480	4,640	4,780	1,070
South-West Oxford	2,700	2,810	2,900	2,990	3,080	3,150	3,220	520
Zorra	3,070	3,240	3,340	3,440	3,530	3,620	3,710	640
Oxford County	44,280	48,230	51,330	54,410	57,430	60,070	62,600	18,320

Source: Hemson Consulting Ltd.

Table 23 - Total Population Forecast by Area Municipality, 2016-2046

Area Municipality	2016	2021	2026	2031	2036	2041	2046	2016-46
Woodstock	42,040	46,620	50,480	54,470	58,480	62,250	65,950	23,910
Tillsonburg	16,310	17,380	18,280	19,240	20,240	21,220	22,150	5,840
Ingersoll	13,110	14,240	15,130	16,090	17,070	18,030	18,960	5,850
Blandford-Blenheim	7,600	7,980	8,300	8,650	9,020	9,400	9,760	2,160
East Zorra-Tavistock	7,330	7,940	8,420	8,930	9,450	9,940	10,400	3,070
Norwich	11,310	11,850	12,320	12,820	13,360	13,890	14,390	3,080
South-West Oxford	7,880	8,140	8,380	8,650	8,910	9,120	9,330	1,450
Zorra	8,360	8,740	8,990	9,250	9,530	9,830	10,120	1,760
Oxford County	113,940	122,890	130,300	138,100	146,060	153,680	161,060	47,010

Source: Hemson Consulting Ltd.

Table 24 - Total Place of Work Employment Forecast by Area Municipality, 2016-2046

Area Municipality	2016	2021	2026	2031	2036	2041	2046	2016-46
Woodstock	25,430	28,440	30,040	31,690	33,720	36,050	38,730	13,300
Tillsonburg	8,580	9,060	9,320	9,600	9,950	10,360	10,810	2,230
Ingersoll	8,990	9,710	10,080	10,470	10,950	11,510	12,150	3,160
Blandford-Blenheim	1,820	1,910	1,950	1,990	2,050	2,120	2,210	390
East Zorra-Tavistock	2,800	2,950	3,020	3,100	3,200	3,320	3,450	650
Norwich	4,050	4,200	4,280	4,360	4,470	4,600	4,740	690
South-West Oxford	2,850	2,920	2,960	2,990	3,040	3,090	3,150	300
Zorra	2,800	2,890	2,920	2,960	3,010	3,080	3,150	350
Oxford County	57,320	62,080	64,570	67,160	70,390	74,130	78,390	21,070

Source: Hemson Consulting Ltd.

Table 25 - Population Related Employment Forecast by Area Municipality, 2016-2046

Area Municipality	2016	2021	2026	2031	2036	2041	2046	2016-46
Woodstock	9,630	10,710	11,240	11,870	12,660	13,520	14,500	4,870
Tillsonburg	3,410	3,670	3,800	3,960	4,160	4,380	4,630	1,220
Ingersoll	2,410	2,650	2,760	2,900	3,070	3,270	3,490	1,080
Blandford-Blenheim	730	770	780	810	840	870	910	180
East Zorra-Tavistock	1,090	1,190	1,230	1,290	1,350	1,430	1,510	420
Norwich	1,340	1,410	1,450	1,500	1,560	1,630	1,700	360
South-West Oxford	760	790	810	830	860	880	900	140
Zorra	710	750	760	770	790	810	840	130
Oxford County	20,080	21,940	22,830	23,930	25,290	26,790	28,480	8,400

Source: Hemson Consulting Ltd.

Table 26 - Employment Land Employment Forecast by Area Municipality, 2016-2046

Area Municipality	2016	2021	2026	2031	2036	2041	2046	2016-46
Woodstock	15,800	17,730	18,800	19,820	21,060	22,520	24,230	8,430
Tillsonburg	5,170	5,390	5,520	5,650	5,800	5,980	6,180	1,010
Ingersoll	6,580	7,060	7,320	7,570	7,880	8,240	8,660	2,080
Blandford-Blenheim	620	640	660	670	690	710	730	110
East Zorra-Tavistock	970	1,010	1,030	1,050	1,070	1,100	1,130	160
Norwich	1,640	1,690	1,720	1,750	1,790	1,830	1,880	240
South-West Oxford	1,240	1,250	1,260	1,270	1,280	1,290	1,300	60
Zorra	1,120	1,150	1,170	1,180	1,200	1,220	1,240	120
Oxford County	33,140	35,920	37,480	38,960	40,770	42,890	45,350	12,210

Source: Hemson Consulting Ltd.

Table 27 - Rural Based Employment Forecast by Area Municipality, 2016-2046

Area Municipality	2016	2021	2026	2031	2036	2041	2046	2016-46
Woodstock	0	0	0	0	0	0	0	0
Tillsonburg	0	0	0	0	0	0	0	0
Ingersoll	0	0	0	0	0	0	0	0
Blandford-Blenheim	470	500	500	510	530	540	560	90
East Zorra-Tavistock	740	760	760	770	780	790	810	70
Norwich	1,070	1,100	1,100	1,110	1,130	1,140	1,160	90
South-West Oxford	850	880	890	890	910	920	940	90
Zorra	960	990	1,000	1,010	1,030	1,050	1,070	110
Oxford County	4,090	4,230	4,250	4,290	4,380	4,440	4,540	450

Source: Hemson Consulting Ltd.

C. TWENTY YEAR PLANNING PERIOD GROWTH FORECAST

The forecasts are prepared by five-year intervals corresponding with the Census. However, for the purposes of assessing the 20 year land need in the County, a breakdown of the forecasts annually has been prepared in order to estimate housing growth anticipated over the 3-year, 10-year and 20-year planning periods and employment growth for the 20-year planning period from 2019 to 2039. Land need is based on growth in settlement areas serviced by municipal water and wastewater and designated 'Large Urban Centre' or 'Serviced Village' in the *Oxford County Official Plan*.

Residential land need to accommodate population growth is assessed on the basis of housing units, thus for this purpose the household forecast is the focus.

For the purpose of assessing industrial land need in the County, the employment land employment category is the focus, as most employment land employment occurs on industrial land.

Along with this, a marginal share of population-related employment is expected to occur on industrial land, for example food services to employees. The amount of employment occurring in industrial areas that are population-related category does vary at the local level, however, for the purposes of the forecasts, a 5% estimate is used.

Consideration was also given to land need for the balance of population-related employment, which will occur on a range of land use designations in the County, including commercial and institutional, residential, industrial and minimally, rural lands

(e.g. agricultural related uses and on-farm diversified uses). Rural based employment by definition does not occur on urban designated industrial lands and, therefore, is not explicitly considered in the land need analysis, although some rural type employment uses may locate on employment lands, the effect on land need is negligible within the context of overall employment lands employment.

Annualized forecast results are shown on Tables 28 through 30 below which identify the three-year, ten-year and twenty-year growth increments, used as a basis for establishing housing demand and associated serviced settlement area land need, consistent with current Provincial policy direction in this regard.

Table 28 - Household Forecast by Area Municipality, 2019-2039

Year	Woodstock	Tillsonburg	Ingersoll	Blandford-Blenheim	East Zorra-Tavistock	Norwich	South-West Oxford	Zorra	Oxford County
2016	17,150	7,130	5,080	2,730	2,710	3,710	2,700	3,070	44,280
2017	17,530	7,230	5,180	2,760	2,760	3,750	2,720	3,100	45,030
2018	17,840	7,310	5,260	2,790	2,800	3,790	2,740	3,130	45,660
2019	18,090	7,370	5,320	2,810	2,840	3,820	2,750	3,150	46,150
2020	18,300	7,420	5,370	2,830	2,870	3,840	2,760	3,170	46,560
2021	19,140	7,640	5,580	2,890	2,990	3,940	2,810	3,240	48,230
2022	19,450	7,720	5,650	2,910	3,030	3,980	2,830	3,260	48,830
2023	19,700	7,780	5,710	2,930	3,070	4,010	2,840	3,280	49,320
2024	19,910	7,830	5,760	2,950	3,100	4,030	2,850	3,290	49,720
2025	20,080	7,870	5,800	2,960	3,120	4,050	2,860	3,300	50,040
2026	20,750	8,050	5,950	3,010	3,210	4,120	2,900	3,340	51,330
2027	21,060	8,130	6,020	3,040	3,250	4,160	2,920	3,360	51,940
2028	21,310	8,190	6,080	3,060	3,290	4,190	2,930	3,380	52,430
2029	21,510	8,240	6,130	3,080	3,320	4,210	2,940	3,390	52,820
2030	21,670	8,280	6,170	3,090	3,340	4,230	2,950	3,400	53,130
2031	22,330	8,450	6,320	3,140	3,440	4,300	2,990	3,440	54,410
2032	22,630	8,530	6,390	3,170	3,480	4,340	3,010	3,460	55,010
2033	22,870	8,590	6,450	3,190	3,520	4,370	3,020	3,470	55,480
2034	23,070	8,640	6,500	3,210	3,550	4,390	3,030	3,480	55,870
2035	23,230	8,680	6,540	3,220	3,570	4,410	3,040	3,490	56,180
2036	23,870	8,850	6,690	3,270	3,660	4,480	3,080	3,530	57,430
2037	24,130	8,920	6,750	3,290	3,700	4,510	3,090	3,550	57,940
2038	24,340	8,980	6,800	3,310	3,730	4,540	3,100	3,560	58,360
2039	24,510	9,020	6,840	3,320	3,750	4,560	3,110	3,570	58,680
2040	24,650	9,060	6,880	3,330	3,770	4,580	3,120	3,580	58,970
2041	25,220	9,200	7,020	3,380	3,840	4,640	3,150	3,620	60,070
2019-2022	1,360	350	330	100	190	160	80	110	2,680
2019-2029	3,420	870	810	270	480	390	190	240	6,670
2019-2039	6,420	1,650	1,520	510	910	740	360	420	12,530

Table 29 - Employment Land Employment Forecast by Area Municipality, 2019-2039

Year	Woodstock	Tillsonburg	Ingersoll	Blandford-Blenheim	East Zorra-Tavistock	Norwich	South-West Oxford	Zorra	Oxford County
2016	15,800	5,170	6,580	620	970	1,640	1,240	1,120	33,140
2017	16,170	5,210	6,670	620	980	1,650	1,240	1,130	33,670
2018	16,470	5,250	6,750	620	990	1,660	1,240	1,130	34,110
2019	16,710	5,280	6,810	620	990	1,670	1,240	1,130	34,450
2020	16,910	5,300	6,860	620	990	1,670	1,240	1,130	34,720
2021	17,730	5,390	7,060	640	1,010	1,690	1,250	1,150	35,920
2036	21,060	5,800	7,880	690	1,070	1,790	1,280	1,200	40,770
2037	21,340	5,840	7,950	690	1,080	1,800	1,280	1,200	41,180
2038	21,570	5,870	8,010	690	1,080	1,810	1,280	1,200	41,510
2039	21,760	5,890	8,060	690	1,080	1,810	1,280	1,200	41,770
2040	21,910	5,910	8,100	690	1,080	1,810	1,280	1,200	41,980
2041	22,520	5,980	8,240	710	1,100	1,830	1,290	1,220	42,890
2019-39	5,050	610	1,250	70	90	140	40	70	7,320

Table 30 - Population Related Employment Forecast by Area Municipality, 2019-2039

Year	Woodstock	Tillsonburg	Ingersoll	Blandford-Blenheim	East Zorra-Tavistock	Norwich	South-West Oxford	Zorra	Oxford County
2016	9,630	3,410	2,410	730	1,090	1,340	760	710	20,080
2017	9,840	3,460	2,460	740	1,110	1,350	770	720	20,450
2018	10,010	3,500	2,500	750	1,130	1,360	770	730	20,750
2019	10,140	3,530	2,530	750	1,140	1,370	770	730	20,960
2020	10,250	3,560	2,550	750	1,150	1,380	770	730	21,140
2021	10,700	3,670	2,650	770	1,200	1,410	790	750	21,940
2036	12,640	4,150	3,070	840	1,390	1,550	850	790	25,280
2037	12,810	4,190	3,110	850	1,410	1,560	860	790	25,580
2038	12,950	4,230	3,140	850	1,420	1,570	860	790	25,810
2039	13,060	4,260	3,170	850	1,430	1,580	860	790	26,000
2040	13,150	4,280	3,190	850	1,440	1,590	860	790	26,150
2041	13,500	4,370	3,270	870	1,480	1,620	880	810	26,800
2019-39	2,920	730	640	100	290	210	90	60	5,040

VI OXFORD COUNTY VACANT LAND INVENTORY, 2019

An important component of the Phase One Comprehensive Review is an assessment of the land supply potential to accommodate forecasted growth and the identification of any likely additional land need within the County's serviced settlements to meet the twenty-year growth outlook from 2019 to 2039.

As such, a land needs assessment was undertaken, including updating Oxford County's Vacant Land Supply Inventory to a 2019 base, in order to assess the sufficiency of the currently designated land supply in the County's serviced settlements. The land supply mapping is provided in Appendix B.

The land needs assessment considers the forecasts and distribution of forecast growth to Area Municipalities in the context of growth potential through available vacant land supply and intensification to determine whether there is sufficient land within the County's designated fully serviced settlements to accommodate the forecasted residential and employment growth for the County and each of the eight Area Municipalities over the 20 year planning horizon to 2039.

A. UPDATES TO VACANT LAND SUPPLY

Oxford County's Vacant Land Inventory was updated by Hemson to 2019 based on ArcMap GIS shapefiles provided by the County and consultation with County Planning staff and Area Municipalities. A review was undertaken of underutilized properties, intensification potential, approved plans known development interests, and, building permit data to year end 2018.

The supply was vetted with Area Municipal and County Planning staff to ensure an appropriate basis for assessing land need based on the most current information available on the status of designated lands in the County. The 2019 serviced settlement area land supply inventory provides the basis for assessing the sufficiency of the land supply to accommodate the twenty-year forecasts, County-wide and within each Area Municipality in Oxford.

The primary subject of the land needs assessment are the Large Urban Centres of the City of Woodstock and Towns of Ingersoll and Tillsonburg and the fully serviced settlements (i.e. Serviced Villages) in the five rural Townships. A review of the land supply in the un-serviced and partially serviced rural villages in each Township was

also undertaken, however, these settlements were not the focus of the land needs analysis for the reasons outlined in Section VII.

The land supply information was prepared working from the review of the County GIS data as a starting point, cross-referenced with Municipal Property Assessment Corporation (MPAC) data, and updated based on a Google Earth desktop review, significant input received from County Planning and Area Municipal staff, and additional analyses. The supply accounts for vacant, occupied, underutilized, constrained lands and vacant lands in approved plans.

Non-developable lands (e.g. environmental and non-environmental constraints and utilized portions of underutilized lands) were initially identified under the County vacant land inventory constraint GIS layer. These were further reviewed in order to ensure appropriate take-outs consistent with industry practice and Provincial policy guidelines for land budgeting.

Further consultation with Area Municipal staff also helped to identify lands constrained by factors such as lack of road access, poor configuration, incompatible land use designations and constraints related to ownership. These concerns with the existing designated land supply were reviewed and considered on a parcel-by-parcel basis to ensure consistency with Provincial policy in determining the final net developable land supply. Lands considered to be non-developable based on policy direction and local conditions were removed from the land supply and not considered in the growth capacity analysis and land needs assessment.

The County also has a number of areas that are designated as 'Future Urban Growth' in the Official Plan. S.4.2.2.6 of the *Oxford County Official Plan* provides direction for these Future Urban Growth areas. The intent of the designation is to identify lands outside of existing settlements that may potentially be suitable for development as part of future settlement expansion and to provide direction for the phasing of development on growth lands within designated settlements. Future Urban Growth lands and Secondary Planning Areas within designated settlements are included in the land supply analysis. However, Future Urban Growth lands that are located outside of designated settlements in the County were not included, as they would still require an Official Plan amendment supported by a full comprehensive review and land need justification to be considered for re-designation for settlement purposes.

Settlement area and/or municipal boundary expansions and associated studies often require considerable lead time to complete. Therefore, providing clarity around where and how the County and Area Municipalities intend to grow beyond the twenty-year

planning period can be important, especially insofar as it can assist in achieving key growth management priorities such as long-term protection of employment lands and planning for and ensuring efficient use of infrastructure and public service facilities and being able to quickly respond to higher than expected growth. An updated Future Urban Growth, or similar designation, could be an effective tool for providing such longer-term planning direction within the County that is consistent with applicable provincial policies.

B. RESIDENTIAL LAND SUPPLY AND DEVELOPMENT POTENTIAL IN SERVICED SETTLEMENTS

A number of adjustments were made to the 2019 Vacant Land Inventory in order to realistically assess its potential to accommodate the forecasted growth for the County and Area Municipalities. Following determination of a total vacant developable supply, a number of adjustments were made to the residential land supply, as per land budgeting standard practice in Ontario, in order to identify a net developable supply for assessing land need.

A net-to-gross adjustment of 55% in the urban centres of Woodstock, Ingersoll and Tillsonburg, and 60% in the Townships' Serviced Villages was applied to residentially designated parcels greater in size than 0.2 ha to allow for roads, parkland, stormwater management and other necessary infrastructure and public uses, consistent with subdivision requirements and development patterns in the County and land budgeting standards. The net-to-gross adjustment also recognizes that some population-related employment uses may locate in residential areas, such as those jobs related to schools, libraries and various other institutional and neighbourhood commercial uses.

Underutilized residential lands were also identified, which may provide some additional development potential and potential for intensification, particularly those in optimal locations and with good accessibility. However, given uncertainty surrounding the ultimate likelihood and timing of development of these lands, if and when they may be available to market or be further developed by the exiting owner, they are not attributed a specific growth potential for the purpose of the land needs assessment. That said, it is recognized that these lands may potentially accommodate some limited development through intensification or redevelopment over the longer term.

The results of the 2019 residential land supply inventory are provided in Tables 31 and 32, for vacant lands and remaining units on vacant lands in approved plans. Results

indicate 270 ha of net vacant developable residential land County-wide; and 169 net ha of vacant land in approved plans.

Table 31 - Vacant Residential Land within Serviced Settlement Areas, 2019 (ha)

Area Municipality	Vacant Land Supply	Non-Developable	Gross Developable Supply ¹	Net Developable Supply ²
Woodstock	125	53	72	41
Tillsonburg	192	18	174	96
Ingersoll	24	6	18	11
Blandford-Blenheim	35	0	35	21
East Zorra-Tavistock	29	2	27	17
Norwich	71	8	62	37
South-West Oxford	17	0	16	10
Zorra	68	5	63	38
Oxford County	559	92	467	270

Source: Oxford County Vacant Land Inventory 2019.

Note 1: Gross developable supply includes vacant lands not within approved plans. Environmental and other non-developable lands have been removed.

Note 2: A net-to-gross adjustment of 55% in the City of Woodstock and Towns of Ingersoll and Tillsonburg, and 60% in the Townships is made to parcels greater in size than 0.2 ha to provide for the development of local roads, parkland, stormwater management ponds, rights-of-way and other infrastructure and public facilities.

Table 32 - Number of Residential Units within Approved Plans, 2019

Area Municipality	Number of Units (anticipated) ¹
Woodstock	1,818
Tillsonburg	1,003
Ingersoll	376
Blandford-Blenheim	143
East Zorra-Tavistock	279
Norwich	172
South-West Oxford	22
Zorra	386
Oxford County	4,199

Source: Oxford County Vacant Land Inventory 2019.

Note 1: Comprised of unbuilt lots/units within registered and draft approved plans of subdivision and/or condominium and approved site plans as well as unbuilt lots created through an application for consent.

C. INDUSTRIAL, COMMERCIAL AND INSTITUTIONAL LAND SUPPLY INVENTORIES AND CONSIDERATIONS FOR DEVELOPMENT POTENTIAL

An employment land supply inventory was also prepared, in order to assess the developable industrial, commercial and institutional lands within the County. The industrial land supply provides a basis for assessing employment land need for the 2019 to 2039 timeframe.

For industrial lands, an 80% net-to-gross adjustment was applied to vacant parcels greater than 5 ha in size, consistent with industry standards in land budgeting. Based on land budgeting practice and consultation with County Planning and Area Municipal staff, an additional 20% adjustment was made to the vacant portions of designated industrial supply in order to account for parcels which may not develop over the long-term, vacancy and underutilization⁶.

The figures for the vacancy and underutilization adjustments are approximate and based in part on a standard approach in land budgeting work for outer ring and more rural communities outside of the GGH, as well as assessment of the employment land supply and development characteristics within Oxford County. Similar adjustments and factors are used in Municipal Comprehensive Reviews and land budgeting studies in upper-tier municipalities throughout Ontario. The assumptions and adjustments for the Oxford County study are based on this standard approach, then refined to reflect local conditions, taking into account consultation with County and Area Municipal staff regarding observed development patterns on-the-ground with respect to employment land vacancy and underutilization. These adjustments are intended to account for lands or portions thereof that remain vacant over the long term due to factors such as odd lot size/configuration, challenging site conditions, underutilization, inactivity, land banking etc.

The results of the industrial land supply inventory indicate 403 net ha of long-term development industrial land supply available to accommodate employment growth on industrial land in the County.

⁶ These adjustments compare with a 25% net-to-gross adjustment on parcels greater than 4ha and a 5% adjustment to the total occupied and vacant industrial supply in a 2014, "Oxford County Population Household and Employment Forecasts and Employment Land Study". Overall, the adjustments are within a comparable range and accepted land budgeting practice for assessing long-term industrial land supply and need.

Table 33 - Developable Industrial Land, 2019 (ha)

Area Municipality	Vacant Land Supply	Non-Developable	Gross Developable Supply ¹	Net Developable Supply ²	Adjusted for Underutilization & Long-term Vacancy ³
Woodstock	373	38	335	278	222
Tillsonburg	180	84	96	77	62
Ingersoll	62	8	54	46	37
Blandford-Blenheim	24	0	24	20	16
East Zorra-Tavistock	11	0	11	9	7
Norwich	29	0	29	24	19
South-West Oxford	18	0	18	14	11
Zorra	46	0	45	36	29
Oxford County	741	130	611	508	402

Source: Oxford County Vacant Land Inventory 2019.

Note 1. Gross developable supply: includes vacant lands not within approved plans. Environmental and other non-developable lands have been removed.

Note 2. Net Supply: A net-to-gross adjustment of 80% is made to parcels greater in size than 5 ha to account for the development of local roads, stormwater management pods, rights of way and servicing.

Note 3. Adjusted for Underutilization and Long-term Vacancy: An adjustment of 20% has been made to the net developable supply to account for underutilization and vacancy in order to identify the likely supply available to be developed over the long-term.

Consideration was given to how the industrial land supply within each Oxford Area Municipality aligns with the needs of employers typically locating on industrial lands. Consultation with Area Municipalities also highlighted a number of potential issues that may affect the availability of lands for development. These include: fragmented supply; smaller spread out parcels; and industrial lands being largely privately owned, meaning availability and timing of development is dependent on individual choice.

For the most part, the findings from the County's previous Employment Lands Study (Watson, 2014) with respect to the investment readiness of the County's employment areas appear to remain applicable to the current supply. Among key requirements for attracting employers typically locating on industrial lands, Oxford remains relatively well-positioned in terms of market choice with a range of parcel sizes, including a good portion of the supply in proximity to, or with, highway access; and affordability, particularly relative to industrial land markets closer to the core of the GGH. Industrial parcels identified in the Vacant Land Inventory update for the County range in size from 0.2 ha to 20+ net ha. That said, a number of the area municipalities in the County continue to cite the limited supply of municipally owned and/or shovel ready industrial

land and lack of larger development sites as potentially limiting their ability to attract and accommodate industrial growth. To address these concerns, the County and Area Municipalities should continue to explore opportunities to expand their inventory of shovel ready land and take actions necessary to help ensure a 20 year supply of designated industrial land and range and choice of suitable sites can be maintained in each area municipality. This could include, but is not necessarily limited to, settlement expansions (where supported by the land need assessment in Section VII), land acquisition, servicing and planning beyond the 20 year planning horizon for infrastructure and the long term protection of employment land etc.

The land supply inventory also indicates roughly 100 net vacant ha of commercial and institutional designated lands available to accommodate primarily population-related employment, as shown in Table 34 below.

Table 34 - Developable Commercial and Institutional Land, 2019 (ha)

Area Municipality	Vacant Land Supply	Non-Developable	Gross Developable Supply ¹	Net Developable Supply ²
Woodstock	61	10	51	49
Tillsonburg	20	1	20	18
Ingersoll	22	2	20	18
Blandford-Blenheim	3	0	3	3
East Zorra-Tavistock	1	0	1	1
Norwich	2	0	2	2
South-West Oxford	0	0	0	0
Zorra	14	0	14	12
Oxford County	123	12	111	102

Source: Oxford County Vacant Land Inventory 2019.

Note 1: Gross developable supply includes vacant lands not within approved plans. Environmental and other non-developable lands have been removed.

Note 2: A net-to-gross adjustment of 80% is made to parcels greater in size than 5 ha to account for the development of local roads, stormwater management ponds, rights of way and servicing.

Some population-related employment growth is also accommodated within residential areas through the net-to-gross adjustments described in the section prior.

VII LAND NEEDS ASSESSMENT

The land needs assessment determines the capacity to accommodate growth by applying a density estimate to the net vacant developable supply in order to identify a number of units on residential lands, or jobs on employment lands, that could be accommodated within the County's serviced settlement areas. This is compared with the net developable land supply available to accommodate residential and employment uses, and any potential shortages to meet the twenty-year outlook are identified. The gross developable area that could be justifiable under the Phase One Comprehensive Review is also determined.

A review of the land supply in the un-serviced and partially serviced 'Villages' in each of the Townships was also undertaken to provide input into the preparation of the growth allocations for the rural Area Municipalities. However, given their limited potential for growth, uncertainty with respect to the timing and likelihood of development and Provincial and County policies which direct growth to fully serviced settlement areas, these settlements are not included in the land needs assessment.

A. INTENSIFICATION ANALYSIS

The PPS requires that the County plan for intensification when managing growth, assessing land need, and in particular, as a precursor to justifying any proposed expansions to designated serviced settlement area land supply. The *Oxford County Official Plan* addresses this requirement by establishing a minimum target of 15 percent of all new residential dwelling units created within the Large Urban Centres that are to occur by way of residential intensification over the planning period. The 15% target is consistent with targets in other rural municipalities in Ontario.

According to the County's Official Plan policies, any new residential units identified as being within the 'built up area' of the designated Large Urban Centres are considered to count towards achievement of the residential intensification target. While intensification is generally defined as infill development or redevelopment occurring at higher densities, the delineation of a built boundary and planned concentration of development within it is a complementary and accepted approach to planning for intensification. This approach is consistent with that taken by the Province in establishing targets and measuring progress towards intensification in the Greater Golden Horseshoe through the *Growth Plan*. The built up areas (e.g. areas within the built boundary) for each Area Municipality, as delineated by the County, were reviewed

by Hemson and determined to be reasonable and appropriate for the purposes of monitoring intensification.

The County has been tracking the location of residential building permits within Oxford's settlement areas in order to measure the degree to which development within the Large Urban Centres is meeting the policy, as well as how the Townships are tracking comparatively. Table 35 below indicates the location of residential permits for the three Large Urban Centres (Woodstock, Tillsonburg and Ingersoll) and the balance of the County over the 2016 to 2018 period; and considers it within the context of forecast housing unit growth for the Area Municipalities over the balance of the planning period to 2039.

Table 35 - Residential Unit Growth within the Built Up Area of Large Urban Centres and Serviced Villages

Municipality	New Residential Units 2016-2018				Total Estimated Unit Growth 2016-2039		
	Within Built Boundary	Outside of Built Boundary	Total	Share within the Built Boundary (%)	Forecast Unit Growth 2019- 2039	Total Unit Growth 2016- 2039	Share within the Built Boundary (%)
Woodstock	1,176	188	1,364	86%	6,420	7,784	15%
Tillsonburg	395	2	397	99%	1,650	2,047	19%
Ingersoll	317	3	320	99%	1,520	1,840	17%
Blandford-Blenheim	66	0	66	100%	510	576	11%
East Zorra-Tavistock	207	8	215	96%	910	1125	18%
Norwich	142	4	146	97%	740	886	16%
South-West Oxford	23	0	23	100%	360	383	6%
Zorra	65	16	81	80%	420	501	13%
Oxford County	2,391	221	2,612	92%	12,530	15,142	16%

Source: Hemson Consulting Ltd. and Oxford County.

Based on review of the development which has already occurred within the Large Urban Centres during the 2016 to 2018 period, the County has met, and would continue to meet, the 15% target for the planning period set out in the Official Plan, irrespective of the location of residential units going forward. A review of development in the Townships also suggests residential growth has been well concentrated within the 'built up area'. That said, intensification remains a key growth management priority from a Provincial and County perspective in order to ensure the efficient use of land and infrastructure investment over the long-term.

Going forward, intensification will continue to be encouraged and supported in appropriate locations in accordance with the County's Official Plan policies. For example, intensification will continue to be achieved through development of remaining vacant lands within the existing 'built-up areas' of the County. Intensification through redevelopment on the existing built supply (e.g. in key intensification areas, such as the Central Area and Village Core designations) and on underutilized lands identified through the Vacant Land Inventory review and update may also contribute to some extent, notwithstanding that the ultimate potential and timing of such development is less predictable than with the vacant land supply. Any additional units that may potentially be developed through these forms of intensification would likely be comprised of apartment or townhouse type units. Taken together with the achievement to date, the County is anticipated to continue to meet its established intensification target over the planning period.

In addition to setting the intensification target and monitoring progress, the forecasts prepared for the Phase One Comprehensive Review also implicitly plan for intensification through a continued moderate shift to higher densities of residential development over the planning horizon, particularly from single and semi-detached units to rowhouses.

B. RESIDENTIAL LAND NEED ANALYSIS

Based on review of existing and planned densities, official plan policies, prior studies undertaken for the County and extensive consultation with County Planning staff, the following average residential density assumptions were determined for vacant residential lands, that are not in an approved plan, in order to estimate the capacity of the vacant developable land supply in the serviced settlements within Oxford's Area Municipalities and County-wide:

- 28 units per net ha in the City of Woodstock;
- 22 units per net ha in the Towns of Ingersoll and Tillsonburg; and
- 17 units per net ha within serviced settlements of the Townships of Blandford-Blenheim, East Zorra-Tavistock, Norwich, South-West Oxford and Zorra.

The residential densities tested here as a basis for assessing land need and the residential density requirements in the Official Plan are comparable to those in other more rural and outer-ring municipalities and provide a reasonable basis for assessing land need and proposed development within Oxford. The above densities represent an average and on-the-ground development will ultimately occur at a range of both

lower and higher densities, in accordance with the ranges permitted by the applicable policies of the Official Plan.

The average densities were applied to the net vacant developable supply to estimate a capacity for unit growth on currently designated vacant residential land in fully serviced settlement areas. Planned units on vacant lands within approved plans were also taken into account. The resulting unit capacity was compared with the 2019 to 2039 housing unit growth outlook.

Where the forecast unit growth exceeded the identified unit capacity, the density estimate was applied again, in order to identify the net land area that would be required to accommodate the additional units. An adjustment was then made to the net land area in order to identify the gross developable land area that would be required. This represents the demonstrated additional land need under the Comprehensive Review, in accordance with the criteria set out in provincial policy. The results are shown in Tables 36 and 37 below.

Table 36 - Estimated Residential Unit Growth Capacity within Serviced Settlement Areas, 2019 (ha)

Area Municipality	Net Vacant Developable	Density Assumption (Units/Net ha)	Estimated Unit Potential	Units in Approved Plans of Subdivision	Total Estimated Unit Potential
Woodstock	41	28	1,136	1,818	2,954
Tillsonburg	96	22	2,109	1,003	3,112
Ingersoll	11	22	239	376	615
Blandford-Blenheim	21	17	357	143	500
East Zorra-Tavistock	17	17	284	279	563
Norwich	38	17	638	172	810
South-West Oxford	10	17	169	22	191
Zorra	38	17	648	386	1,034
Oxford County	271	21	5,580	4,199	9,779

Source: Hemson Consulting Ltd. based on Oxford County Vacant Land Inventory 2019.

Table 37 - Estimated Residential Land Need within Serviced Settlement Areas, 2019-2039 (ha)

Area Municipality	Estimated Unit Potential	Forecast Unit Growth	Difference	Potential Surplus + or Shortage (-)	Estimated Residential Land Need
Woodstock	2,954	6,420	(3,466)	(124)	225
Tillsonburg	3,112	1,650	1,462	66	-
Ingersoll	615	1,520	(905)	(41)	75
Blandford-Blenheim	500	510	(10)	(1)	-
East Zorra-Tavistock	563	910	(347)	(20)	35
Norwich	810	740	70	4	-
South-West Oxford	191	360	(169)	(10)	17
Zorra	1,034	420	614	36	-
Oxford County	9,779	12,530			

Source: Hemson Consulting Ltd. based on Oxford County Vacant Land Inventory 2019.

Note: Based on estimated unit potential and forecast Housing Growth, 2019-2039.

Note: Potential Surplus or Shortage is in Net ha; Estimated Residential Land Need is Gross ha.

The results of the residential land needs assessment indicate a potential additional land need to accommodate the residential growth outlook to 2039 may be justifiable under the Comprehensive Review, in the City of Woodstock, Town of Ingersoll and Townships of East Zorra-Tavistock and South-West Oxford, as shown in Table 38 above. Blandford-Blenheim is currently roughly in balance, so could also be in a potential land need position in the near future, particularly once the new 2020 PPS comes into effect on May 1st, 2020, which will extend the current planning horizon from 20 to 25 years.

C. INDUSTRIAL LAND NEED ANALYSIS

The employment land needs assessment considers the growth outlook on industrial lands over the 2019 to 2039 timeframe. It is assumed that 95% of forecast growth in Employment Land Employment and 5% of forecast Population-Related Employment growth will locate on industrial lands. The balance of employment will be accommodated throughout the various settlement land use designations in the County, including commercial and institutional designated lands, on residential lands (as provided for in the net-to-gross adjustment on residential land supply) and in the rural area (a modest amount, driven by the rural resident population).

The total estimated job growth on industrial lands by Area Municipality is shown in Table 38 below.

Table 38 - Estimated Job Growth on Designated Employment Lands, 2019-2039

Area Municipality	Employment Land		Population Related		Total Job Growth on Employment Lands
	Total Job Growth	On Employment Lands	Total Job Growth	On Employment Lands	
Woodstock	5,050	4,798	2,930	147	4,944
Tillsonburg	610	580	740	37	617
Ingersoll	1,250	1,188	640	32	1,220
Blandford-Blenheim	70	67	100	5	72
East Zorra-Tavistock	90	86	250	13	98
Norwich	140	133	220	11	144
South-West Oxford	40	38	90	5	43
Zorra	70	67	60	3	70
Oxford County	7,320	6,954	5,030	252	7,206

Source: Hemson Consulting Ltd. based on Oxford County Vacant Land Inventory 2019.

Note: Designated Employment Lands primarily contain industrial type employment.

Note: The table above estimates 95% of the total job growth in Industrial type employment and 5% of Population Related employment will be on employment lands.

A density assumption was applied to the expected job growth on employment lands in order to identify the estimated land need to accommodate employment growth to 2039. For the City of Woodstock and Towns of Ingersoll and Tillsonburg, 12 jobs per net ha is assumed; and 7 jobs per net ha in the Townships. The density assumptions are consistent with existing employment densities, prior studies for the County and are based on review of the local employment land context in the County and Area Municipalities.

For each Area Municipality, the density assumption was applied to the estimated job growth on industrial lands identified in order to assess the amount of industrial land needed to accommodate employment growth to 2039. This was compared with the available long-term development supply. Where a potential shortage was identified, the net land area was adjusted to identify the total gross developable land area that would be required.

It is not anticipated that intensification of employment lands will play a large role in accommodating employment growth in the County. Infill and intensification of the building stock do occur over time in industrial areas as additions are constructed and, rarely, sites are redeveloped for new employment uses. Employment may rise on individual sites as this occurs. However, this infill and intensification rarely, if ever, results in growth in the total employment of an industrial area, since most employment lands experience stable to declining employment as they age. At best, infill and

intensification operate to keep the employment in an employment area stable, but it cannot be relied on to accommodate employment growth. As such, there is no explicit intensification assumption made in this regard in the industrial land needs assessment. The results are provided in Table 39.

Table 39 - Estimated Industrial Land Need (ha), 2019-2039

Area Municipality	Job Growth Employment Lands	Density Estimate	Estimated Land Need	Net Developable Supply	Potential Surplus + or Shortage (-)	Estimated Industrial Land Need
Woodstock	4,940	12	412	222	(190)	317
Tillsonburg	616	12	51	62	11	-
Ingersoll	1,220	12	102	37	(65)	109
Blandford-Blenheim	72	7	10	16	5	-
East Zorra-Tavistock	100	7	14	7	(7)	12
Norwich	144	7	21	19	(1)	3
South-West Oxford	43	7	6	11	5	-
Zorra	70	7	10	29	19	-
Oxford County	7,203		626	402		

Source: Hemson Consulting Ltd. based on Oxford County Vacant Land Inventory 2019.

Note: Potential Surplus or Shortage is in Net ha; Estimated Industrial Land Need is Gross Developable ha.

The results of the industrial land needs assessment also indicate potential additional land need to accommodate anticipated employment growth on industrial lands to 2039 in the City of Woodstock, Town of Ingersoll and Townships of East Zorra-Tavistock and Norwich. As such, those municipalities should immediately begin to consider actions that may need to be undertaken to maintain a 20 year supply of designated industrial land, as permitted by the PPS. Other municipalities, such as Tillsonburg, could also be in need of additional industrial land in the near future, particularly if the planning horizon in the PPS is increased from 20 to 25 years, as is currently proposed by the Province.

D. REGIONAL MARKET AREAS AND LAND NEED

The policies of the PPS are structured such that various population and housing growth and associated land need requirements are to be considered on the basis of a Regional Market Area, as defined in the PPS. The general intent is that upper- and single-tier municipalities would typically serve as the Regional Market Area, with the following exception, as stated in the PPS definition: "Where regional market areas are very large and sparsely populated, a smaller area, if defined in an official plan, may be utilized." In the case of the County, the official plan treats each Area Municipality as a discrete market area, given the geographic and functional characteristics of Oxford communities.

The analysis undertaken for the Phase One Comprehensive Review supports that Oxford County fits the criteria of a large and sparsely populated county, including distinct market areas within the upper-tier municipality. The diverse locational, urban and rural characteristics, expansive land base and distances between serviced settlements, suggest that for the purposes of assessing housing demand, land supply, growth prospects and the potential to accommodate growth, it is important to consider each Area Municipality as a distinct market area. Given the clear gradient of population, density, and market dynamics, it is not reasonable to expect that excess vacant land supply in one municipality will be suitable to meet the demand that is forecast for the County overall, or another Area Municipality within the County. Acknowledging each Area Municipality as a distinct Regional Market Area presents an opportunity to plan for an appropriate range and mix of housing for distinct regions of demand and potential for growth. That is, while land need is considered at the County-wide level, an oversupply of lands in one Area Municipality does not affect the land need in another.

E. HIGH LEVEL ASSESSMENT OF COMMERCIAL LAND

Consideration was given to potential commercial and institutional land need based on a high level analysis of expected employment growth outside of industrial areas.

- The commercial land need analysis considers the supply available to accommodate employment growth on commercial and institutional designated lands within the context of the Population-Related Employment forecast and a minor share of the Employment-Land Employment forecast. In this regard, it is assumed that 95% of forecast growth in Population-Related employment will occur outside of the County's industrial areas along with 4% of the Employment-Land Employment forecast.
- Estimated Work-at-home employment was removed from this analysis as by definition, these jobs occur within residences and do not require employment-specific designated lands.
- It is also assumed that some employment will occur as community serving uses (e.g. schools, churches, convenience commercial uses etc.) on residentially designated lands. In this regard, an assumption of employment occurring on 5% of the land area committed to infrastructure and public service facilities, through the net-to-gross adjustments on the residential land supply, was applied.

- A density assumption of 60 jobs per net ha was applied to estimate potential to accommodate jobs on commercial and institutional designated lands and within public facilities in residential areas.

The analysis is a high level and relatively blunt measure of commercial land need, in comparison to the more sophisticated retail-based analyses that are typically undertaken based on forecasts of population, per capita expenditure patterns on different types of goods as well as trade areas. Notwithstanding, this analysis does provide a general sense of the potential land need to accommodate forecast growth in Population-Related jobs within serviced settlement areas. The results are provided in Table 40 below.

Table 40 - Estimated Employment Growth and Land Supply Potential on Commercial and Institutional Designated Lands and within Residential Areas Oxford County, 2019-2039

Area Municipality	Lands for Public Infrastructure and Facilities ¹	Adjusted for Employment Potential Estimate ²	Vacant Designated Commercial Institutional Land	Estimated Comm., Inst. Designated & Public Facilities Lands within Res Areas	Estimated Employment Potential in Comm., Inst. & Res Areas (# of jobs) ³	Estimated Employment Growth Outside of designated Employment Lands (# of jobs)2019-2039 ⁴	Difference (# of Jobs)
Woodstock	32	6	49	56	3,349	2,976	373
Tillsonburg	78	16	18	33	2,006	718	1,288
Ingersoll	7	1	18	19	1,167	658	509
Blandford-Blenheim	14	3	3	5	326	98	228
East Zorra-Tavistock	10	2	1	3	171	279	(108)
Norwich	25	5	2	7	425	205	220
South-West Oxford	6	1	0	1	78	87	(9)
Zorra	25	5	12	16	990	60	930
Oxford County	197	39	102	142	8,511	5,081	3,430

Source: Hemson Consulting.

¹ Represents lands provided for through the net-to-gross adjustment on residential designated lands. 45% of the net vacant developable supply in Woodstock, Tillsonburg, Ingersoll and 40% in the Rural Townships. These lands provide for physical infrastructure as well as public facilities and community uses where some population-related employment will occur.

² An assumption of 30% of lands provided for infrastructure and community facilities for the purpose of this analysis.

³ Based on estimated average density of 60 jobs per net ha for commercial and institutional uses. This is an average which assumes some employment occurring at both higher and lower densities.

⁴ Estimated at 95% of the Population-Related Employment forecast and 4% of the Employment Land Employment forecast.

Overall, there would not appear to be an immediate need for additional commercial or institutional lands to accommodate the job growth expected for most Area Municipalities and the County as a whole over the twenty-year planning period, based on this analysis. A minimal potential need for additional land was identified for the Township's East Zorra-Tavistock and South-West Oxford.

In addition to being high level, this demand analysis does not consider whether the existing land supply is appropriately located to serve the commercial and institutional need for all areas of the community, or to accommodate specific commercial and institutional uses. As such, the specific need for additional lands to be designated to accommodate population related employment growth and achieve other planning objectives (e.g. providing for a mix and range of employment uses and suitable sites to meet long term needs, supporting liveable and resilient communities and transit/active transportation etc.) over the planning period should be further evaluated through more detailed community level review and analysis (e.g. secondary planning/community design studies undertaken in support of any future settlement expansions, updates to the County's Commercial Policy Review study, retail market impact studies etc.).

VIII CONCLUSIONS AND NEXT STEPS

This report has provided an overview of the background analysis and key findings of the Oxford County Phase One Comprehensive Review. The study will help to inform potential updates to the *Oxford County Official Plan* and a range of other planning and growth management initiatives in the County. The Phase One Comprehensive Review analysis resulted in the following key conclusions:

1. Recent Growth and Change

- Oxford County has continued to grow over recent Census periods, adding 10,850 residents, 7,000 households and nearly 9,500 jobs over the 2001 to 2016 timeframe (the period for reporting historical trends in this document). Housing growth has been out-pacing growth in population, in large part tied to an aging population and resulting gradual decline in average household size.
- The County experienced net employment growth even during the 2006 to 2011 period when most municipalities in Southwestern Ontario experienced a significant decline associated with the 2008–09 recession, particularly in manufacturing and related industries.
- Within the County, the distribution of growth continues to reinforce historical patterns. Most of the residential growth which occurred since 2001 was concentrated in only a few municipalities, predominately Woodstock and to a lesser extent the other Large Urban Centres of Ingersoll and Tillsonburg. Employment growth was also variable and several Area Municipalities within Oxford experienced some decline, notwithstanding that there was County-wide growth.
- Oxford had robust population growth from 2011 to 2016. Based on housing construction and permits since 2016, the outlook for 2016 to 2021 is for growth of about 8,840 people. This would be the highest absolute population growth in a five-year period since the restructured County was formed in 1975, exceeding the 7,500 growth experienced between 1986 and 1991.

2. Growth Outlook

- The outlook going forward is for a continuation of relatively high levels of net in-migration to the County compared to the past periods. Growth and development in this decade to date indicates a changing role for the County within Southwestern Ontario and its adjacency to the Greater Golden Horseshoe. The result is a much higher growth outlook than prior forecasts prepared for the County.

- Forecasts of population, housing and employment were prepared to inform updates to the *Oxford County Official Plan* and other planning and growth management initiatives in the County. Forecasts were prepared for the 2016 to 2046 period and a twenty-year outlook for 2019 to a 2039 horizon was identified. A three year (2019 to 2022) and 10 year (2019 to 2029) residential growth outlook were also prepared to determine whether the residential supply in the County and Area Municipalities was sufficient to address Provincial policy requirements for those two planning periods. The forecasts provided key input into a land needs assessment which identifies the twenty-year land need within Oxford's Area Municipalities. Some potential shortages to meet the 10 and 20 year growth outlook were identified. The County is forecast to grow to 161,000 in total population and 62,000 households by 2046, representing growth of 47,100 residents and 18,300 households from a 2016 base.
- Employment growth is also expected to continue over the forecast horizon with the County anticipated to grow to an employment base of 78,400 in total place of work employment to 2046, representing growth of 21,000 jobs over the forecast horizon from 2016.

3. Area Municipal Forecasts

- Consistent with Provincial planning policy, growth is directed predominantly to fully serviced settlement areas in the County. The long-term pattern of growth and the existing concentrations of households and employment within the County are expected to generally continue, and all Area Municipalities are anticipated to experience growth in population, households and employment over the forecast.
- The greatest share of forecast growth, more than half of County-wide household and employment growth over the 2016 to 2046 horizon, is expected in the City of Woodstock, being the largest urban centre in the County and where the largest share of future demand is expected to continue to focus.
- The Towns of Ingersoll and Tillsonburg are also anticipated to experience continued demand going forward, accounting for 25% of the County-wide forecast growth in housing and employment.
- The 25% balance of the forecast is distributed throughout the Townships, with serviced settlement areas being where most growth in the rural Area Municipalities is expected to occur. Moderate employment growth is also anticipated in all five Townships.

4. Land Supply Inventory and Needs Assessment

- Oxford County's Vacant Land Inventory was updated to 2019 as a basis for assessing land need in Oxford's serviced settlement areas for a twenty-year

timeframe to a 2039 planning horizon and giving consideration to the 3 and 10 year housing growth potential.

- The results of the 2019 residential land supply inventory indicate 270 ha of net vacant developable residential land County-wide; along with roughly 4,200 residential units in approved plans of subdivision.
 - The results of the industrial land supply inventory indicate 403 net ha of long-term development industrial land supply available to accommodate employment growth in the County.
 - 102 net ha of commercial and institutional designated lands were also identified.
- A land needs assessment was undertaken for residential and employment uses, including an analysis of intensification target achievement and potential to accommodate growth through intensification going forward. Through this assessment it was determined that the County has met, and is well positioned to continue to meet, its intensification targets over the planning period. Overall, the residential intensification targets and density requirements in the County Official Plan were found to be reasonable and appropriate from a Provincial policy perspective.
 - The results of the residential land needs assessment indicate there is currently sufficient supply to meet the housing demand for the 3 year and 10 year PPS planning periods in most Area Municipalities. The exceptions being the City of Woodstock and Town of Ingersoll, which both appear to have less than a 10 year supply of designated residential land and the Township of Southwest Oxford which currently has less than a 3 year supply of residential lots/units.

The residential land need for the 20 year planning period to 2039 was identified as follows:

- 225 gross developable ha in the City of Woodstock;
- 75 gross developable ha in the Town of Ingersoll;
- 35 gross developable ha in the Township of East Zorra-Tavistock; and
- 17 gross developable ha in the Township of South-West Oxford

In addition, it appears that the Township of Blandford-Blenheim will also soon be in need of additional residential land, particularly once the current planning horizon in the PPS is extended from 20 to 25 years later this year.

- The employment land need assessment indicates that additional industrial land is also expected to be required to meet the 20 year (2019-2039) employment growth outlook in the following Area Municipalities:
 - 317 gross developable ha in the City of Woodstock

- 109 gross developable ha in the Town of Ingersoll
 - 12 gross developable ha in the Township of East Zorra-Tavistock; and
 - 3 gross developable ha in the Township of Norwich.
- It appears that Oxford remains relatively well-positioned in terms of the suitability of the industrial land supply for attracting and accommodating forecasted employment growth. That said, the County and Area Municipalities should continue to explore opportunities to expand their inventory of shovel ready industrial land and take actions necessary to help ensure a 20 year supply of designated industrial land and range and choice of suitable sites for industrial development is maintained.
 - A high-level assessment of commercial and institutional land need was also undertaken. No significant additional land need was identified for any of the Area Municipalities through this assessment. However, given the high level nature of the assessment, more detailed community level analysis would need to be undertaken to determine the specific need to designate additional lands to accommodate population related growth and achieve other community planning objectives.
 - Where this report has identified a potential land need, the County and Area Municipalities should begin to consider the actions that may need to be undertaken to maintain a 20 year supply of designated growth land (e.g. boundary adjustments, Phase II Comprehensive Review, Secondary Planning etc.). In the case of Woodstock and Ingersoll, immediate action will likely need to be considered to ensure there will continue to be sufficient opportunity to accommodate a minimum of 10 years (increasing to 15 years on May 1st, 2020) of forecasted residential growth, as required by the PPS.

Given that the PPS planning horizon will soon be extended from 20 to 25 years and the considerable lead time typically required to complete settlement expansions and municipal boundary adjustments, the County and Area Municipalities may also wish to consider the potential benefits of planning somewhat beyond the new 25 year planning period, where appropriate. This could provide increased flexibility to undertake more comprehensive community and infrastructure planning and to ensure the long term protection of employment land. It could also allow municipalities to more quickly respond to opportunities to secure large scale industrial employers or to address greater than anticipated growth. The designation of additional growth lands could then be phased in through amendment, as required to ensure a consistent 20-25 year supply of land is maintained.

The County should continue to monitor the residential supply for each of the Area Municipalities in relation to the 3 year (e.g. intensification and residential lots/units in approved plans) and 10 year (e.g. intensification and land designated for residential purposes) PPS land supply objectives on an ongoing basis and consider any actions

that may need to be undertaken to help ensure they can continue to be met moving forward.

The Phase One Comprehensive Review has identified that potential changes to settlement area boundaries may need to be considered in order to ensure an adequate land supply to meet the twenty-year growth outlook, consistent with Provincial policy direction in this regard.

B. NEXT STEPS

The results of the forecasts and land needs assessment contained in this report will provide input to a range of planning and infrastructure studies in the County, will aid in the justification of potential changes to settlement area boundaries, where land need has been identified, and will inform potential updates to the *Oxford County Official Plan*.

APPENDIX A
BACKGROUND TABLES

Forecast Population by Age and Sex

Forecast Area Municipal Population, Household (by Unit Type) and Employment Growth

Forecast Area Municipal Persons Per Unit (PPU) Values

Forecasts by Area Municipality, Oxford County, 2016-2046

Forecast Population by Age and Sex
Oxford County, 2016-2046

Oxford County - Population Forecasts, by Age and Sex¹

Age	2016			2021			2026			2031			2036			2041			2046		
	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female
	113950	56650	57300	122920	61030	61890	130290	64650	65640	138100	68480	69620	146050	72450	73600	153650	76230	77420	161060	79960	81100
0 - 4	6580	3340	3240	7260	3720	3540	7900	4050	3850	8540	4380	4160	9010	4620	4390	9380	4810	4570	9790	5020	4770
5 - 9	6630	3420	3210	6910	3520	3390	7480	3840	3640	8120	4170	3950	8770	4510	4260	9250	4750	4500	9620	4940	4680
10 - 14	6680	3470	3210	7070	3650	3420	7260	3700	3560	7850	4030	3820	8500	4370	4130	9160	4710	4450	9640	4960	4680
15 - 19	6970	3560	3410	7310	3750	3560	7600	3890	3710	7820	3950	3870	8440	4300	4140	9130	4650	4480	9820	5010	4810
20 - 24	6930	3530	3400	7900	3940	3960	8050	4050	4000	8380	4200	4180	8630	4280	4350	9300	4650	4650	10030	5020	5010
25 - 29	6940	3510	3430	8100	4110	3990	8810	4400	4410	8980	4520	4460	9340	4690	4650	9620	4780	4840	10340	5180	5160
30 - 34	7170	3710	3460	7620	3880	3740	8570	4370	4200	9290	4670	4620	9480	4800	4680	9850	4980	4870	10150	5080	5070
35 - 39	6840	3490	3350	7450	3870	3580	7760	3960	3800	8680	4440	4240	9380	4730	4650	9590	4870	4720	9960	5050	4910
40 - 44	6880	3510	3370	7180	3690	3490	7660	4000	3660	7970	4090	3880	8890	4570	4320	9580	4860	4720	9790	5000	4790
45 - 49	7160	3700	3460	7260	3700	3560	7450	3820	3630	7950	4140	3810	8280	4250	4030	9200	4730	4470	9890	5020	4870
50 - 54	8670	4310	4360	7420	3790	3630	7440	3760	3680	7640	3880	3760	8150	4210	3940	8480	4310	4170	9400	4790	4610
55 - 59	8400	4140	4260	8770	4310	4460	7490	3780	3710	7520	3750	3770	7750	3890	3860	8260	4210	4050	8580	4310	4270
60 - 64	7320	3630	3690	8360	4070	4290	8670	4210	4460	7460	3720	3740	7540	3720	3820	7760	3860	3900	8250	4160	4090
65 - 69	6560	3140	3420	7300	3550	3750	8260	3950	4310	8610	4120	4490	7460	3670	3790	7540	3670	3870	7770	3810	3960
70 - 74	4880	2310	2570	6220	2900	3320	6900	3290	3610	7850	3690	4160	8240	3880	4360	7150	3460	3690	7240	3470	3770
75 - 79	3720	1720	2000	4420	2030	2390	5630	2560	3070	6310	2940	3370	7230	3330	3900	7580	3500	4080	6600	3130	3470
80 - 84	2790	1160	1630	3040	1340	1700	3640	1600	2040	4700	2060	2640	5320	2400	2920	6100	2720	3380	6400	2860	3540
85 - 89	1780	700	1080	1940	740	1200	2130	870	1260	2610	1070	1540	3420	1400	2020	3870	1640	2230	4420	1850	2570
90 - 94	800	240	560	990	360	630	1080	380	700	1220	460	760	1520	580	940	2010	770	1240	2270	900	1370
95 - 99	210	50	160	320	90	230	400	140	260	450	150	300	520	190	330	640	230	410	850	310	540
100+	40	10	30	80	20	60	110	30	80	150	50	100	180	60	120	200	70	130	250	90	160

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Oxford County

Year	Population (Excluding Undercount)	Population ¹	Households				PPU	
			Singles	Semis	Multiples (Rows)	Apartment		Total Residential
2016	110,860	113,940	32,210	2,340	2,680	7,090	44,280	2.47
2021	119,560	122,890	34,620	2,580	3,210	7,850	48,230	2.44
2026	126,780	130,300	36,380	2,810	3,700	8,450	51,330	2.43
2031	134,380	138,100	38,100	3,080	4,200	9,050	54,410	2.43
2036	142,110	146,060	39,770	3,360	4,680	9,660	57,430	2.44
2041	149,500	153,680	41,150	3,630	5,090	10,220	60,070	2.45
2046	156,700	161,050	42,470	3,970	5,510	10,690	62,600	2.46
2016-2036	31,250	32,120	7,560	1,020	2,000	2,570	13,150	
2016-2046	45,840	47,110	10,260	1,630	2,830	3,600	18,320	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	110,860	113,940	51.7%	20,100	33,130	4,090	57,320
2021	119,560	122,890	51.9%	21,940	35,920	4,220	62,080
2026	126,780	130,300	50.9%	22,840	37,470	4,260	64,570
2031	134,380	138,100	49.9%	23,910	38,960	4,300	67,170
2036	142,110	146,060	49.4%	25,290	40,750	4,380	70,400
2041	149,500	153,680	49.5%	26,790	42,870	4,450	74,110
2046	156,700	161,050	49.9%	28,490	45,350	4,550	78,390
2016-2036	31,250	32,120		5,190	7,620	290	13,080
2016-2046	45,840	47,110		8,390	12,220	460	21,070

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

City of Woodstock

Year	Population (Excluding Undercount)	Population ¹	Households					PPU
			Singles	Semis	Multiples (Rows)	Apartments	Total Residential	
2016	40,900	42,040	9,920	1,390	1,860	3,980	17,150	2.33
2021	45,360	46,620	10,950	1,570	2,260	4,360	19,140	2.32
2026	49,110	50,480	11,700	1,770	2,590	4,690	20,750	2.32
2031	52,990	54,470	12,430	1,970	2,920	5,020	22,330	2.32
2036	56,880	58,480	13,120	2,180	3,230	5,340	23,870	2.33
2041	60,510	62,250	13,670	2,400	3,490	5,650	25,220	2.35
2046	64,080	65,950	14,190	2,650	3,760	5,910	26,510	2.37
2016-2036	15,980	16,440	3,200	790	1,370	1,360	6,720	
2016-2046	23,180	23,910	4,270	1,260	1,900	1,930	9,360	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	40,900	42,040	62.2%	9,630	15,800	0	25,430
2021	45,360	46,620	62.7%	10,700	17,730	0	28,430
2026	49,110	50,480	61.1%	11,230	18,800	0	30,030
2031	52,990	54,470	59.8%	11,850	19,820	0	31,670
2036	56,880	58,480	59.2%	12,640	21,060	0	33,700
2041	60,510	62,250	59.5%	13,500	22,520	0	36,020
2046	64,080	65,950	60.4%	14,470	24,230	0	38,700
2016-2036	15,980	16,440		3,010	5,260	0	8,270
2016-2046	23,180	23,910		4,840	8,430	0	13,270

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Town of Ingersoll

Year	Population (Excluding Undercount)	Population ¹	Households					PPU
			Singles	Semis	Multiples (Rows)	Apartments	Total Residential	
2016	12,760	13,110	3,610	400	380	690	5,080	2.48
2021	13,850	14,240	3,900	450	410	830	5,580	2.45
2026	14,720	15,130	4,120	470	450	910	5,950	2.44
2031	15,650	16,090	4,330	500	490	1,000	6,320	2.44
2036	16,600	17,070	4,550	530	530	1,080	6,690	2.45
2041	17,530	18,030	4,730	560	560	1,160	7,020	2.46
2046	18,430	18,960	4,910	600	600	1,230	7,330	2.48
2016-2036	3,840	3,960	940	130	150	390	1,610	
2016-2046	5,670	5,850	1,300	200	220	540	2,250	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	12,760	13,110	70.5%	2,410	6,580	0	8,990
2021	13,850	14,240	70.1%	2,650	7,060	0	9,710
2026	14,720	15,130	68.5%	2,760	7,320	0	10,080
2031	15,650	16,090	66.9%	2,900	7,570	0	10,470
2036	16,600	17,070	65.9%	3,070	7,880	0	10,950
2041	17,530	18,030	65.6%	3,270	8,240	0	11,510
2046	18,430	18,960	65.9%	3,480	8,660	0	12,140
2016-2036	3,840	3,960		660	1,300	0	1,960
2016-2046	5,670	5,850		1,070	2,080	0	3,150

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Town of Tillsonburg

Year	Population (Excluding Undercount)	Population ¹	Households					PPU
			Singles	Semis	Multiples (Rows)	Apartments	Total Residential	
2016	15,870	16,310	4,850	280	350	1,650	7,130	2.19
2021	16,910	17,380	5,210	280	380	1,770	7,640	2.17
2026	17,780	18,280	5,480	290	410	1,860	8,050	2.17
2031	18,720	19,240	5,750	300	450	1,950	8,450	2.18
2036	19,690	20,200	6,010	310	490	2,040	8,850	2.18
2041	20,630	21,220	6,230	320	530	2,130	9,200	2.20
2046	21,530	22,150	6,450	330	560	2,200	9,540	2.22
2016-2036	3,820	3,890	1,160	30	140	390	1,720	
2016-2046	5,660	5,840	1,600	50	210	550	2,410	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	15,870	16,310	54.1%	3,410	5,170	0	8,580
2021	16,910	17,380	53.6%	3,670	5,390	0	9,060
2026	17,780	18,280	52.4%	3,800	5,520	0	9,320
2031	18,720	19,240	51.3%	3,950	5,650	0	9,600
2036	19,690	20,200	50.5%	4,150	5,800	0	9,950
2041	20,630	21,220	50.2%	4,370	5,980	0	10,350
2046	21,530	22,150	50.2%	4,620	6,180	0	10,800
2016-2036	3,820	3,890		740	630	0	1,370
2016-2046	5,660	5,840		1,210	1,010	0	2,220

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Township of Blandford-Blenheim

Year	Population (Excluding Undercount)	Population ¹	Households					PPU
			Singles	Semis	Multiples (Rows)	Apartments	Total Residential	
2016	7,400	7,600	2,510	70	10	150	2,730	2.70
2021	7,770	7,980	2,650	70	10	160	2,890	2.68
2026	8,080	8,300	2,740	70	30	170	3,010	2.67
2031	8,420	8,650	2,830	80	50	180	3,140	2.67
2036	8,780	9,020	2,930	80	70	200	3,270	2.67
2041	9,140	9,400	3,010	80	80	210	3,380	2.69
2046	9,480	9,780	3,090	90	100	220	3,490	2.71
2016-2036	1,380	1,420	420	10	60	50	540	
2016-2046	2,080	2,180	580	20	90	70	760	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	7,400	7,600	24.6%	730	620	470	1,820
2021	7,770	7,980	24.5%	770	640	500	1,910
2026	8,080	8,300	24.1%	780	660	500	1,940
2031	8,420	8,650	23.6%	810	670	510	1,990
2036	8,780	9,020	23.3%	840	690	530	2,060
2041	9,140	9,400	23.2%	870	710	540	2,120
2046	9,480	9,780	23.3%	910	730	560	2,200
2016-2036	1,380	1,420		110	70	60	240
2016-2046	2,080	2,180		180	110	90	380

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Township of East Zorra-Tavistock

Year	Population (Excluding Undercount)	Population ¹	Households				PPU	
			Singles	Semis	Multiples (Rows)	Apartments		Total Residential
2016	7,130	7,330	2,330	90	0	300	2,710	2.57
2021	7,790	7,980	2,540	100	30	320	2,990	2.54
2026	8,340	8,560	2,690	100	70	350	3,210	2.53
2031	8,920	8,930	2,840	110	110	370	3,440	2.53
2036	9,500	9,450	2,990	120	150	400	3,660	2.53
2041	10,040	9,940	3,110	130	180	420	3,840	2.54
2046	10,550	10,400	3,220	140	220	440	4,020	2.56
2016-2036	2,370	2,120	660	30	150	100	950	
2016-2046	3,420	3,070	890	50	220	140	1,310	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	7,130	7,330	39.3%	1,090	970	740	2,800
2021	7,790	7,980	38.0%	1,200	1,010	760	2,970
2026	8,340	8,560	36.5%	1,250	1,030	760	3,040
2031	8,920	8,930	35.1%	1,310	1,050	770	3,130
2036	9,500	9,450	34.1%	1,390	1,070	780	3,240
2041	10,040	9,940	33.5%	1,480	1,100	790	3,370
2046	10,550	10,400	33.2%	1,570	1,130	810	3,510
2016-2036	2,370	2,120		300	100	40	440
2016-2046	3,420	3,070		480	160	70	710

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Township of Norwich

Year	Population (Excluding Undercount)	Population ¹	Households					PPU
			Singles	Semis	Multiples (Rows)	Apartments	Total Residential	
2016	11,000	11,310	3,470	70	60	130	3,710	2.95
2021	11,530	11,850	3,620	70	80	170	3,940	2.91
2026	11,980	12,320	3,740	70	100	210	4,120	2.89
2031	12,480	12,820	3,850	70	130	260	4,300	2.89
2036	12,990	13,360	3,960	80	150	300	4,480	2.89
2041	13,500	13,890	4,050	80	170	340	4,640	2.90
2046	13,990	14,390	4,140	90	190	370	4,780	2.91
2016-2036	1,990	2,050	490	10	90	170	770	
2016-2046	2,990	3,080	670	20	130	240	1,070	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	11,000	11,310	36.8%	1,340	1,640	1070	4,050
2021	11,530	11,850	36.4%	1,410	1,690	1100	4,200
2026	11,980	12,320	35.7%	1,450	1,720	1100	4,270
2031	12,480	12,820	34.9%	1,490	1,750	1110	4,350
2036	12,990	13,360	34.4%	1,550	1,790	1130	4,470
2041	13,500	13,890	34.0%	1,620	1,830	1140	4,590
2046	13,990	14,390	33.9%	1,700	1,880	1160	4,740
2016-2036	1,990	2,050		210	150	60	420
2016-2046	2,990	3,080		360	240	90	690

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Township of South-West Oxford

Year	Population (Excluding Undercount)	Population ¹	Households					PPU
			Singles	Semis	Multiples (Rows)	Apartments	Total Residential	
2016	7,660	7,880	2,580	30	20	80	2,700	2.83
2021	7,910	8,140	2,670	30	20	90	2,810	2.80
2026	8,160	8,380	2,750	30	30	90	2,900	2.80
2031	8,420	8,650	2,830	40	30	100	2,990	2.80
2036	8,660	8,910	2,900	40	40	100	3,080	2.80
2041	8,870	9,120	2,970	40	40	100	3,150	2.80
2046	9,060	9,330	3,030	50	40	110	3,220	2.80
2016-2036	1,000	1,030	320	10	20	20	380	
2016-2046	1,400	1,450	450	20	20	30	520	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	7,660	7,880	37.2%	760	1,240	850	2,850
2021	7,910	8,140	36.9%	790	1,250	880	2,920
2026	8,160	8,380	36.2%	810	1,260	890	2,960
2031	8,420	8,650	35.5%	830	1,270	890	2,990
2036	8,660	8,910	35.1%	850	1,280	910	3,040
2041	8,870	9,120	34.8%	880	1,290	920	3,090
2046	9,060	9,330	34.7%	900	1,300	940	3,140
2016-2036	1,000	1,030		90	40	60	190
2016-2046	1,400	1,450		140	60	90	290

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Township of Zorra

Year	Population (Excluding Undercount)	Population ¹	Households					PPU
			Singles	Semis	Multiples (Rows)	Apartments	Total Residential	
2016	8,140	8,360	2,940	10	10	120	3,070	2.64
2021	8,500	8,740	3,080	10	20	130	3,240	2.62
2026	8,740	8,990	3,160	10	20	140	3,340	2.61
2031	9,000	9,250	3,240	10	30	160	3,440	2.61
2036	9,270	9,530	3,310	20	30	180	3,530	2.61
2041	9,560	9,830	3,380	20	30	200	3,620	2.63
2046	9,830	10,120	3,440	20	40	210	3,710	2.64
2016-2036	1,130	1,170	370	10	20	60	460	
2016-2046	1,690	1,760	500	10	30	90	640	

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Period	Population (Excluding Undercount)	Population ¹	Activity Rate	Employment			
				Population Related Employment	Employment Land Employment	Rural Based Employment	Total Employment
2016	8,140	8,360	34.4%	710	1,120	960	2,800
2021	8,500	8,740	34.0%	750	1,150	990	2,890
2026	8,740	8,990	33.4%	760	1,170	1,000	2,930
2031	9,000	9,250	32.9%	770	1,180	1,010	2,960
2036	9,270	9,530	32.5%	790	1,200	1,030	3,020
2041	9,560	9,830	32.2%	810	1,220	1,050	3,080
2046	9,830	10,120	32.0%	840	1,240	1,070	3,150
2016-2036	1,130	1,170		80	80	70	220
2016-2046	1,690	1,760		130	120	110	350

Source: Hemson Consulting Ltd., 2020

1. Forecast population includes a net Census undercount of approximately 2.7%

Historical and Forecast PPU's by Unit Type, Oxford County, 2001-2046

Forecast of Average Household Sizes by Housing Type, Oxford County, 2001-2046							
Year	Singles	Semis	Rows	Apartments	All HHs		
2001	2.81	2.69	2.76	1.59	2.62		
2006	2.76	2.67	2.39	1.63	2.57		
2011	2.71	2.67	2.23	1.57	2.50		
2016	2.67	2.49	2.27	1.58	2.47		
2021	2.65	2.47	2.25	1.57	2.44		
2026	2.65	2.47	2.25	1.56	2.43		
2031	2.65	2.47	2.25	1.57	2.43		
2036	2.66	2.48	2.26	1.57	2.44		
2041	2.68	2.50	2.28	1.58	2.45		
2046	2.70	2.51	2.29	1.59	2.46		

Historical and Forecast Household Size by Area Municipality and Unit Type - Single Detached, Oxford County, 2001-2046										
	Woodstock	Norwich	Tillsonburg	South-West Oxford	Ingersoll	Zorra	East Zorra-Tavistock	Blandford-Blenheim		
2001	2.70	3.11	2.60	3.01	2.68	2.88	2.94	2.88		
2006	2.68	3.05	2.49	3.02	2.68	2.84	2.86	2.81		
2011	2.63	3.03	2.41	2.91	2.70	2.77	2.76	2.85		
2016	2.63	3.01	2.37	2.86	2.66	2.69	2.70	2.76		
2021	2.61	2.99	2.36	2.84	2.64	2.67	2.68	2.74		
2026	2.61	2.98	2.35	2.84	2.64	2.66	2.67	2.74		
2031	2.61	2.99	2.36	2.84	2.65	2.67	2.68	2.74		
2036	2.62	3.00	2.37	2.86	2.66	2.68	2.69	2.75		
2041	2.64	3.02	2.38	2.88	2.68	2.70	2.71	2.77		
2046	2.66	3.05	2.40	2.90	2.70	2.72	2.73	2.79		

Historical and Forecast Household Size by Area Municipality and Unit Type - Semi-Detached, Oxford County, 2001-2046										
	Woodstock	Norwich	Tillsonburg	South-West Oxford	Ingersoll	Zorra	East Zorra-Tavistock	Blandford-Blenheim		
2001	2.67	0.89	2.55	2.22	3.09	4.33	2.00	3.00		
2006	2.58	3.20	2.96	0.90	2.81	3.25	2.88	3.31		
2011	2.55	2.80	2.23	2.50	2.45	3.33	2.69	3.00		
2016	2.53	3.00	2.33	2.40	2.39	2.00	2.59	3.00		
2021	2.51	2.97	2.31	2.38	2.37	1.98	2.57	2.97		
2026	2.50	2.97	2.30	2.37	2.37	1.98	2.56	2.97		
2031	2.50	2.97	2.30	2.38	2.37	1.98	2.56	2.97		
2036	2.51	2.98	2.31	2.38	2.37	1.99	2.57	2.98		
2041	2.53	3.00	2.33	2.40	2.39	2.00	2.59	3.00		
2046	2.54	3.02	2.34	2.41	2.41	2.01	2.60	3.02		

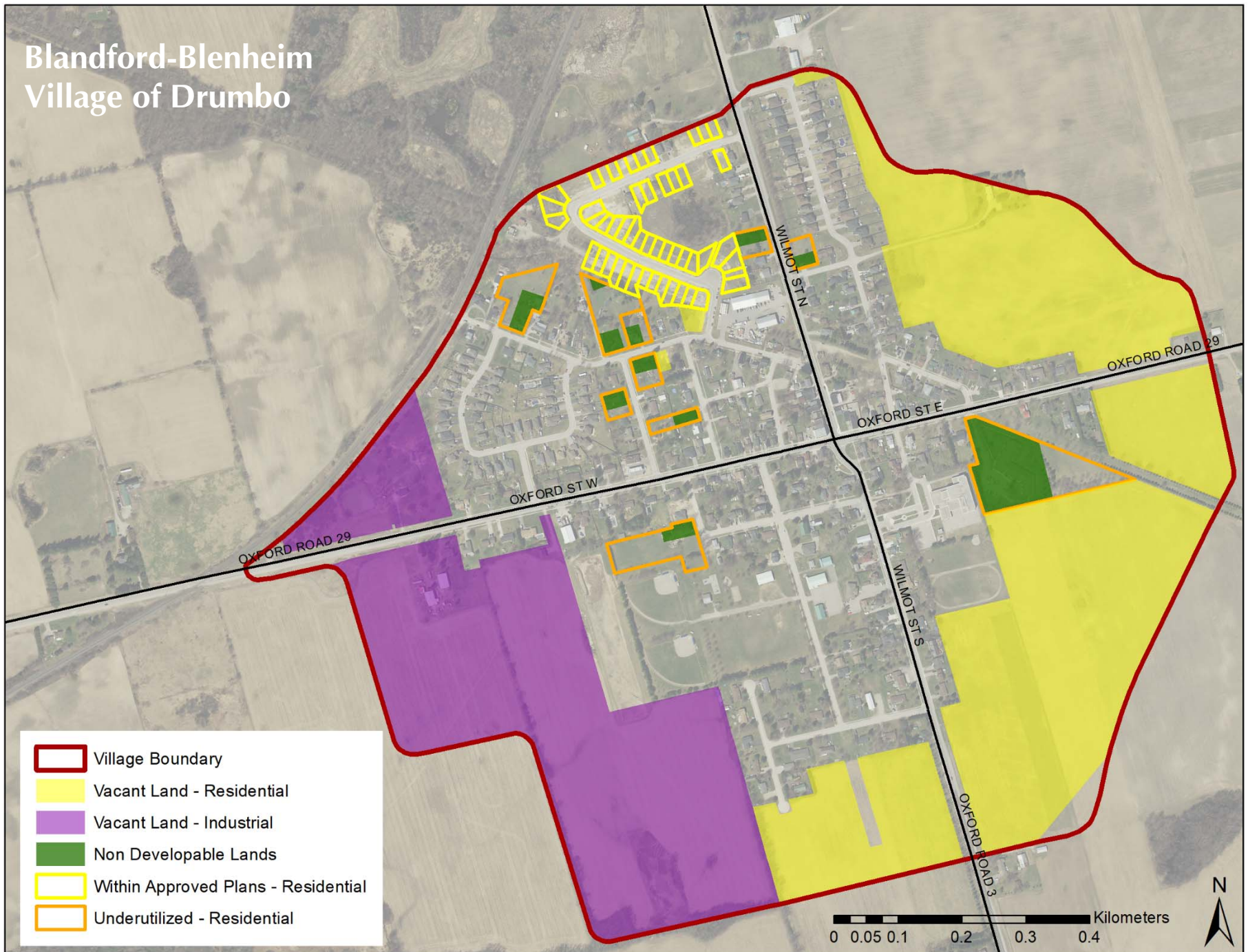
Historical and Forecast Household Size by Area Municipality and Unit Type - Rowhouse, Oxford County, 2001-2046										
	Woodstock	Norwich	Tillsonburg	South-West Oxford	Ingersoll	Zorra	East Zorra-Tavistock	Blandford-Blenheim		
2001	2.86	2.71	2.42	0.00	3.00	0.00	1.50	1.88		
2006	2.47	2.60	2.17	0.00	2.40	0.00	0.88	2.00		
2011	2.30	2.38	2.24	2.33	2.31	2.00	1.00	1.71		
2016	2.27	2.27	2.19	1.67	2.41	1.50	2.00	2.00		
2021	2.27	2.28	2.19	1.67	2.42	1.50	2.00	2.01		
2026	2.29	2.30	2.21	1.69	2.44	1.52	2.00	2.02		
2031	2.32	2.32	2.23	1.70	2.46	1.53	2.00	2.05		
2036	2.34	2.35	2.26	1.72	2.49	1.55	2.00	2.07		
2041	2.37	2.38	2.28	1.74	2.52	1.57	2.00	2.09		
2046	2.39	2.40	2.31	1.76	2.54	1.58	2.00	2.11		

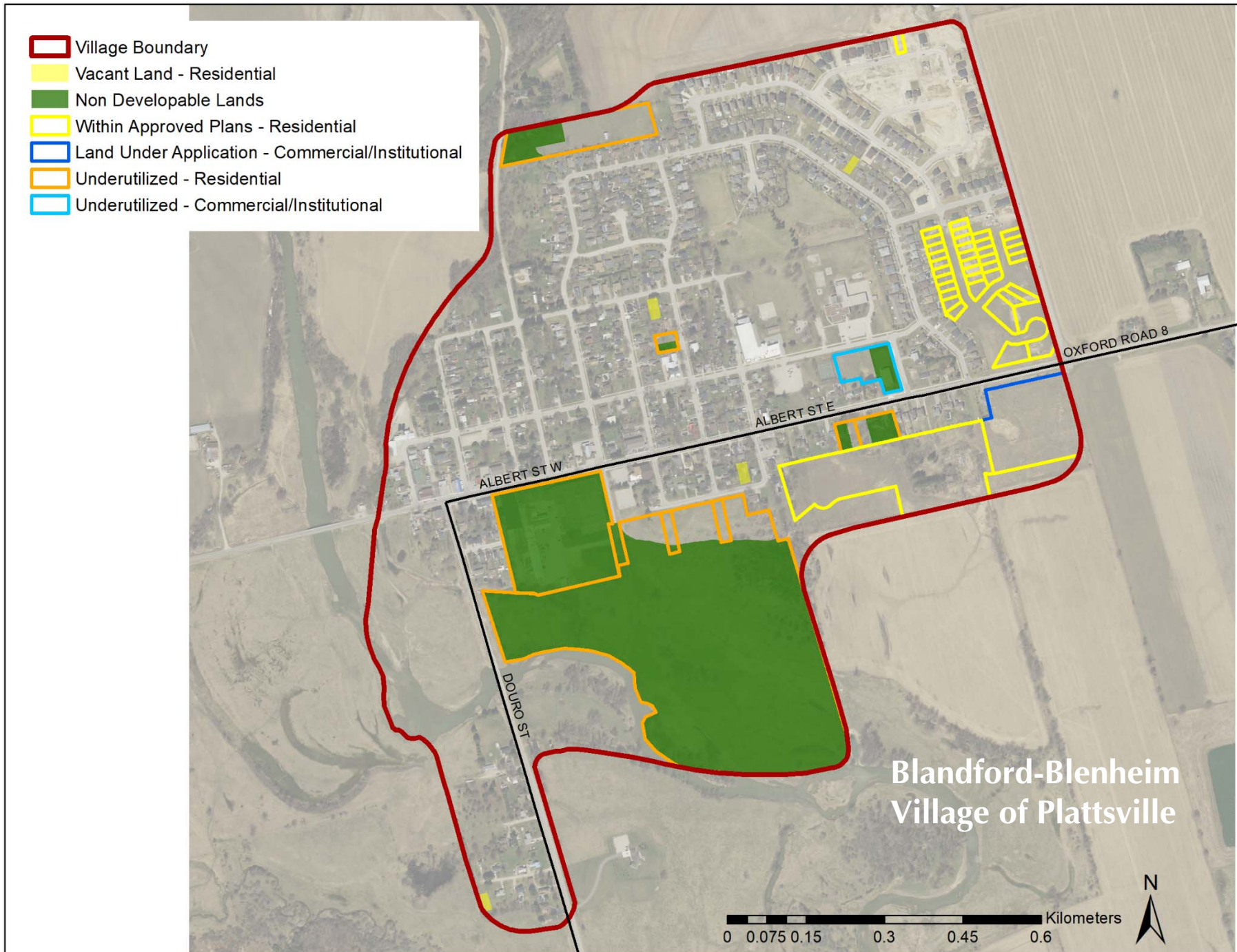
Historical and Forecast Household Size by Area Municipality and Unit Type - Apartment, Oxford County, 2001-2046										
	Woodstock	Norwich	Tillsonburg	South-West Oxford	Ingersoll	Zorra	East Zorra-Tavistock	Blandford-Blenheim		
2001	1.53	2.29	1.51	2.38	1.63	1.96	1.46	2.19		
2006	1.65	1.92	1.63	0.69	1.78	1.45	1.23	1.46		
2011	1.58	1.73	1.60	2.43	1.63	1.50	1.53	1.71		
2016	1.55	1.60	1.62	2.06	1.59	1.65	1.51	1.59		
2021	1.54	1.59	1.61	2.05	1.57	1.64	1.50	1.57		
2026	1.54	1.58	1.60	2.04	1.57	1.64	1.49	1.57		
2031	1.54	1.59	1.61	2.05	1.57	1.64	1.50	1.57		
2036	1.55	1.59	1.61	2.05	1.58	1.64	1.50	1.58		
2041	1.56	1.60	1.63	2.07	1.59	1.66	1.51	1.59		
2046	1.57	1.62	1.64	2.08	1.60	1.67	1.52	1.60		

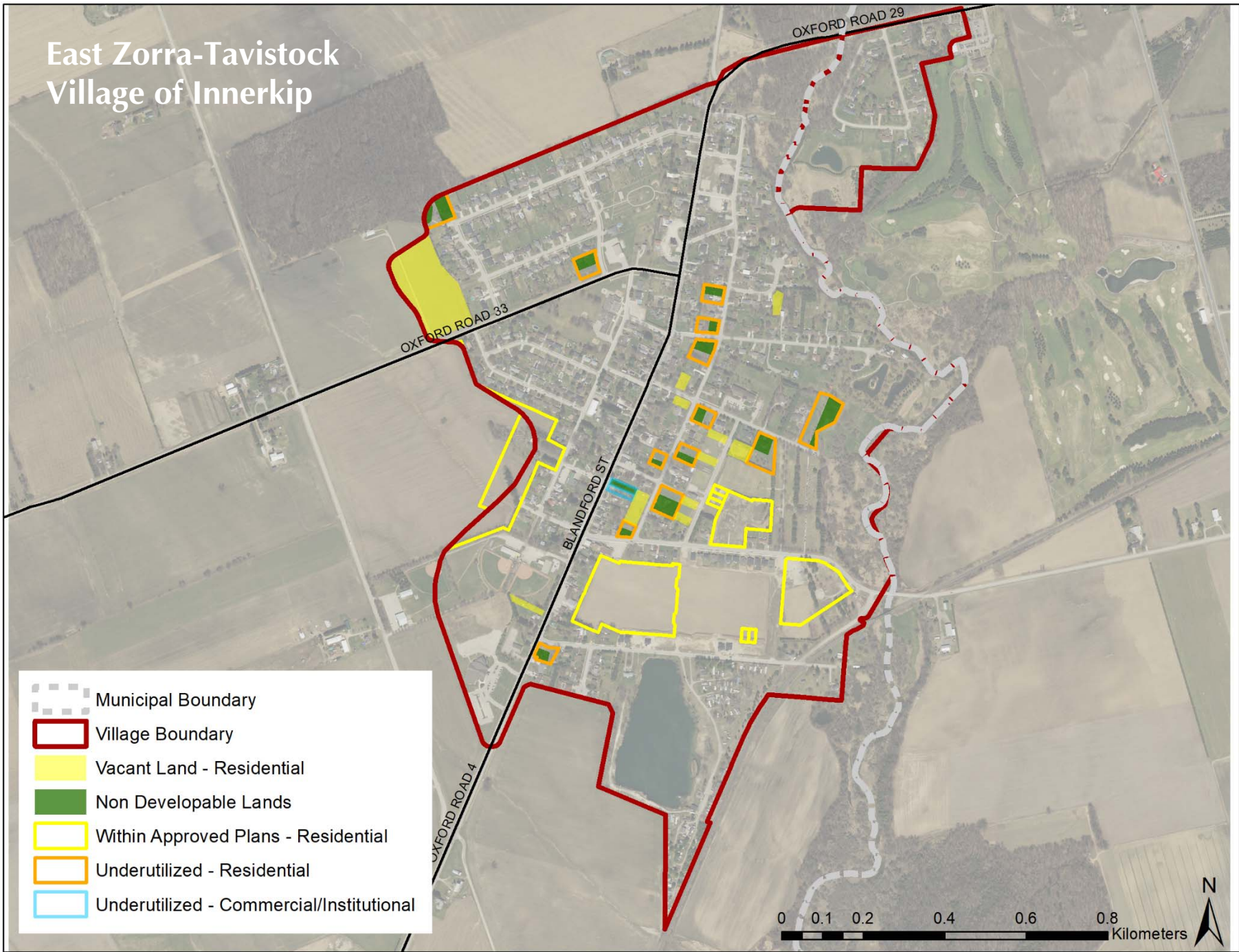
Oxford County – Phase One Comprehensive Review

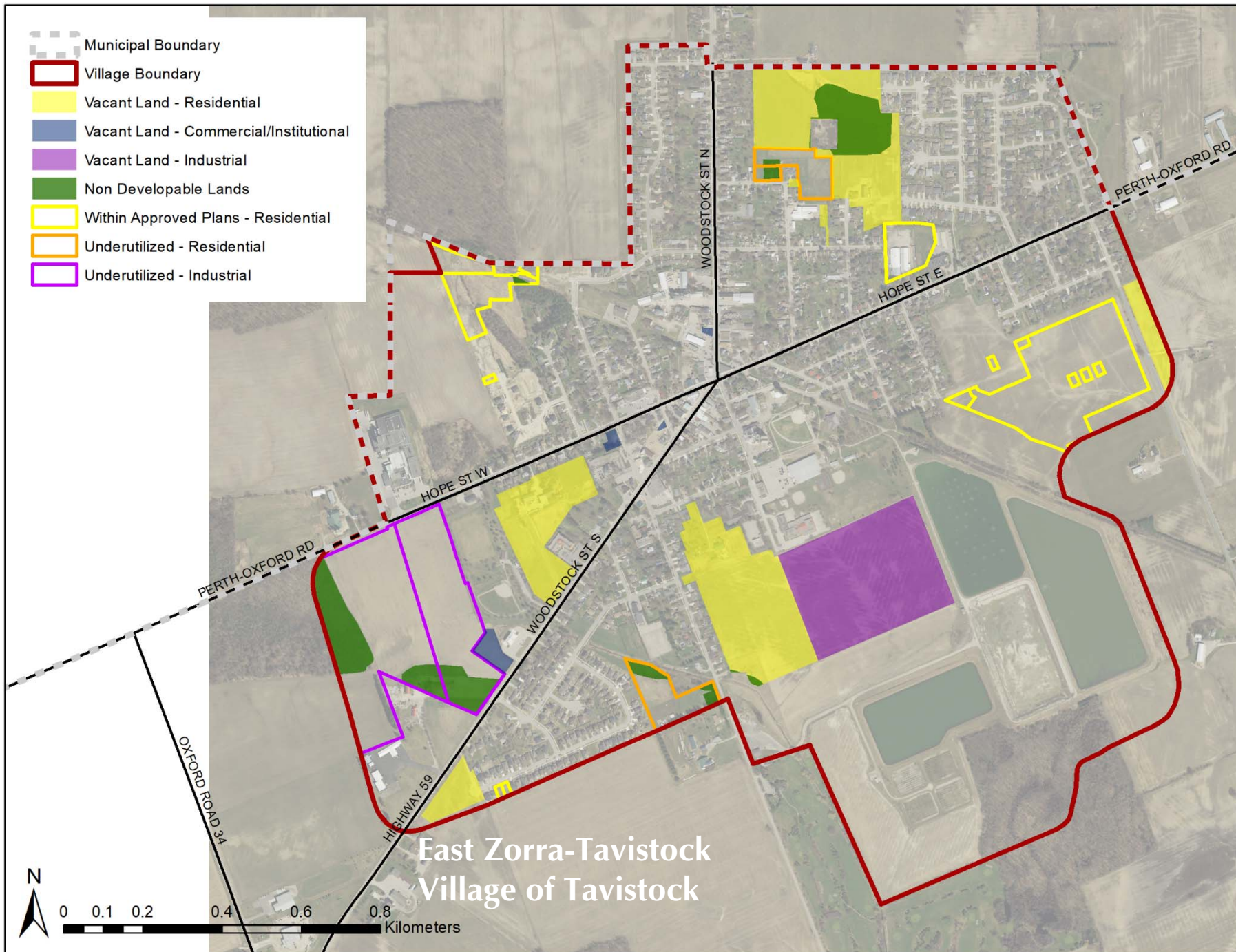
Land Supply by Area Municipality

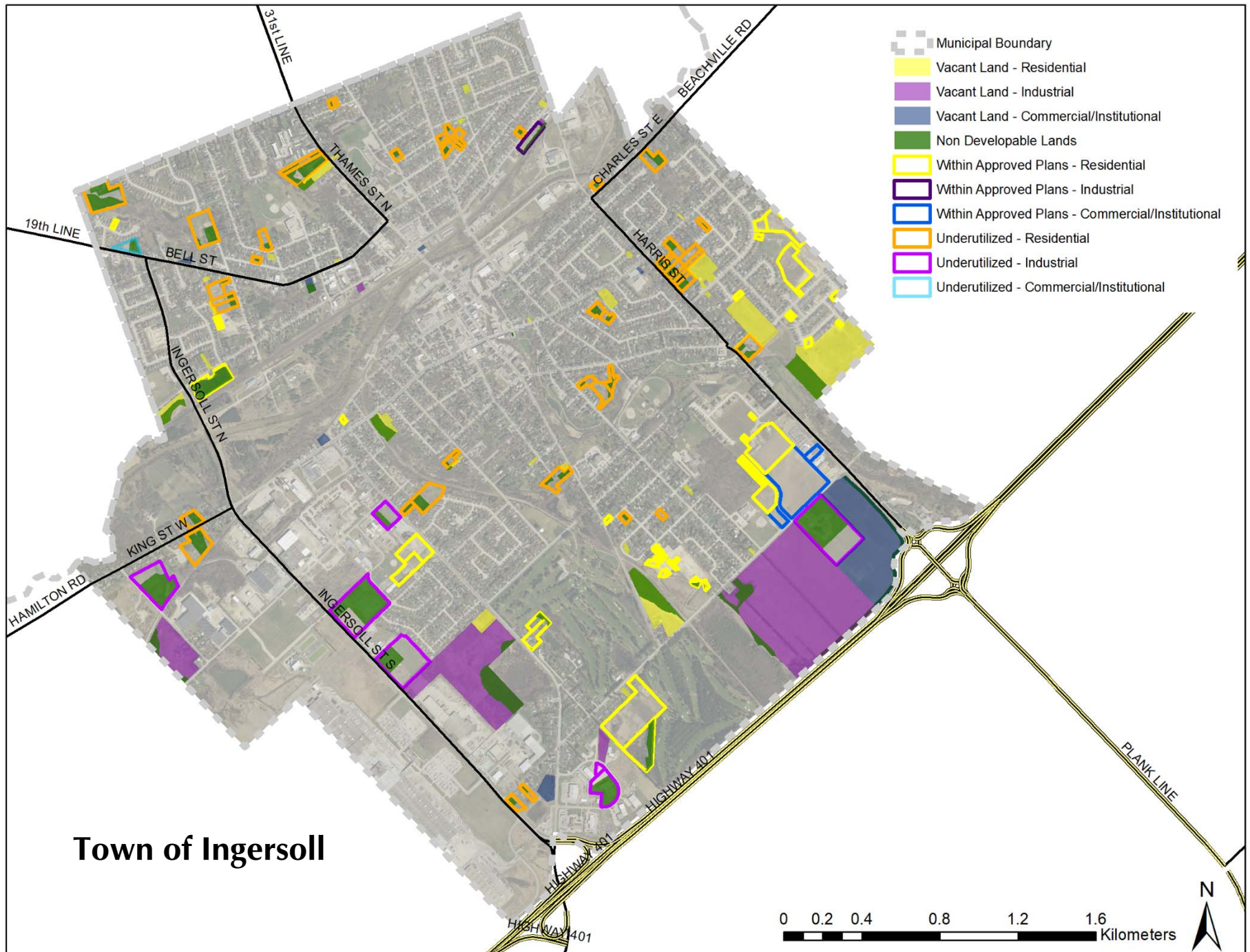
Blandford-Blenheim Village of Drumbo

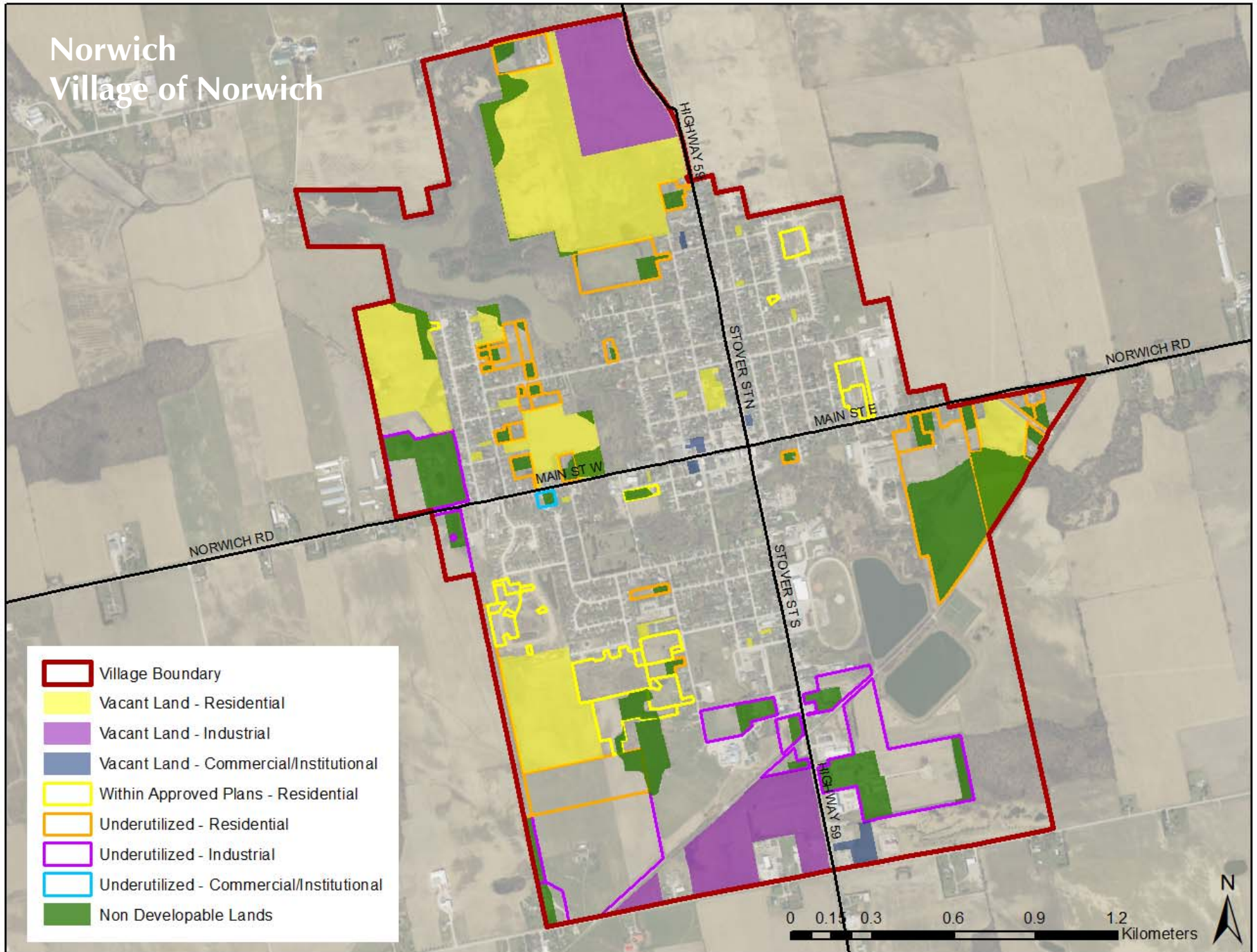




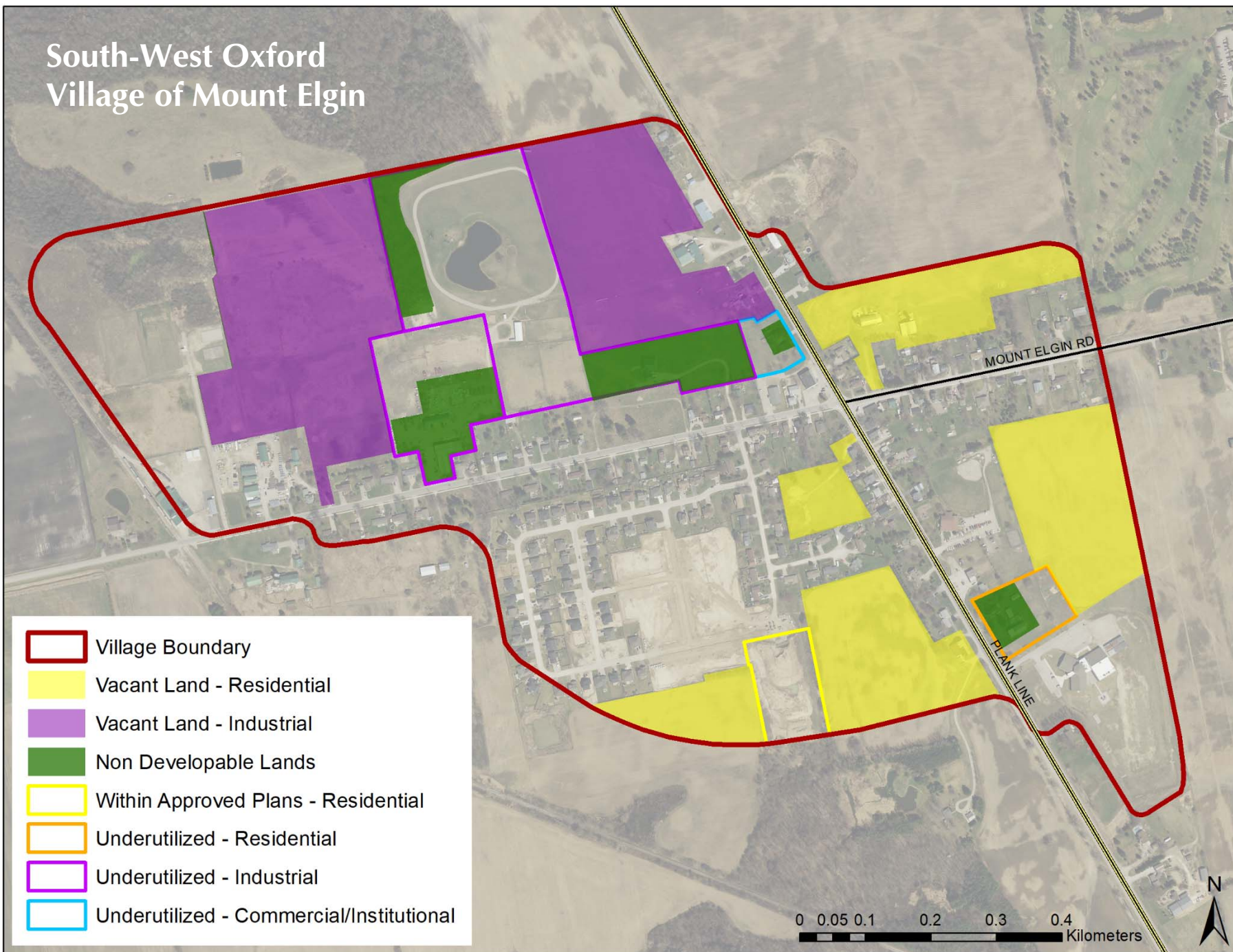




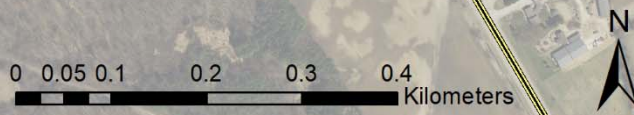




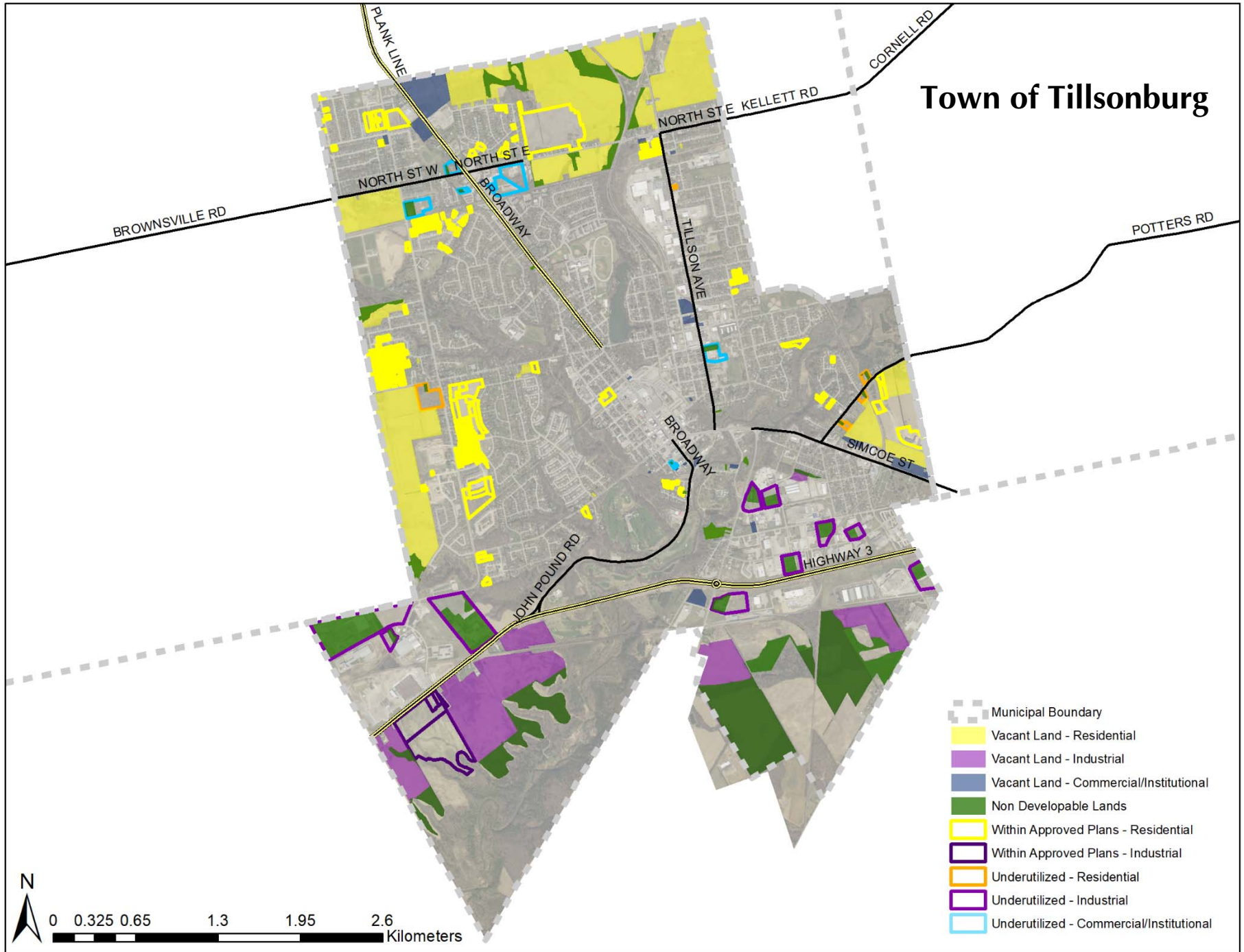
South-West Oxford Village of Mount Elgin



- Village Boundary
- Vacant Land - Residential
- Vacant Land - Industrial
- Non Developable Lands
- Within Approved Plans - Residential
- Underutilized - Residential
- Underutilized - Industrial
- Underutilized - Commercial/Institutional

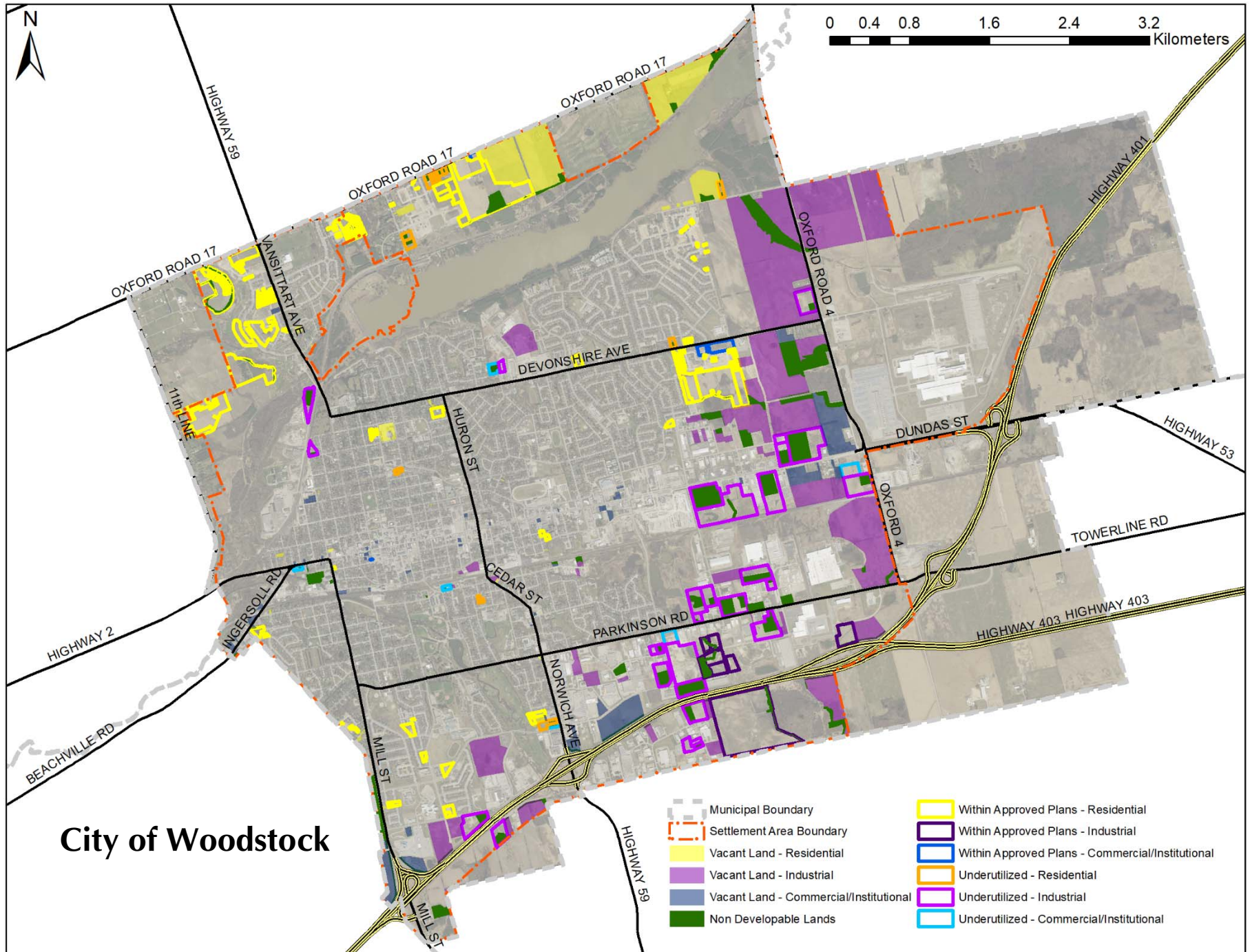


Town of Tillsonburg

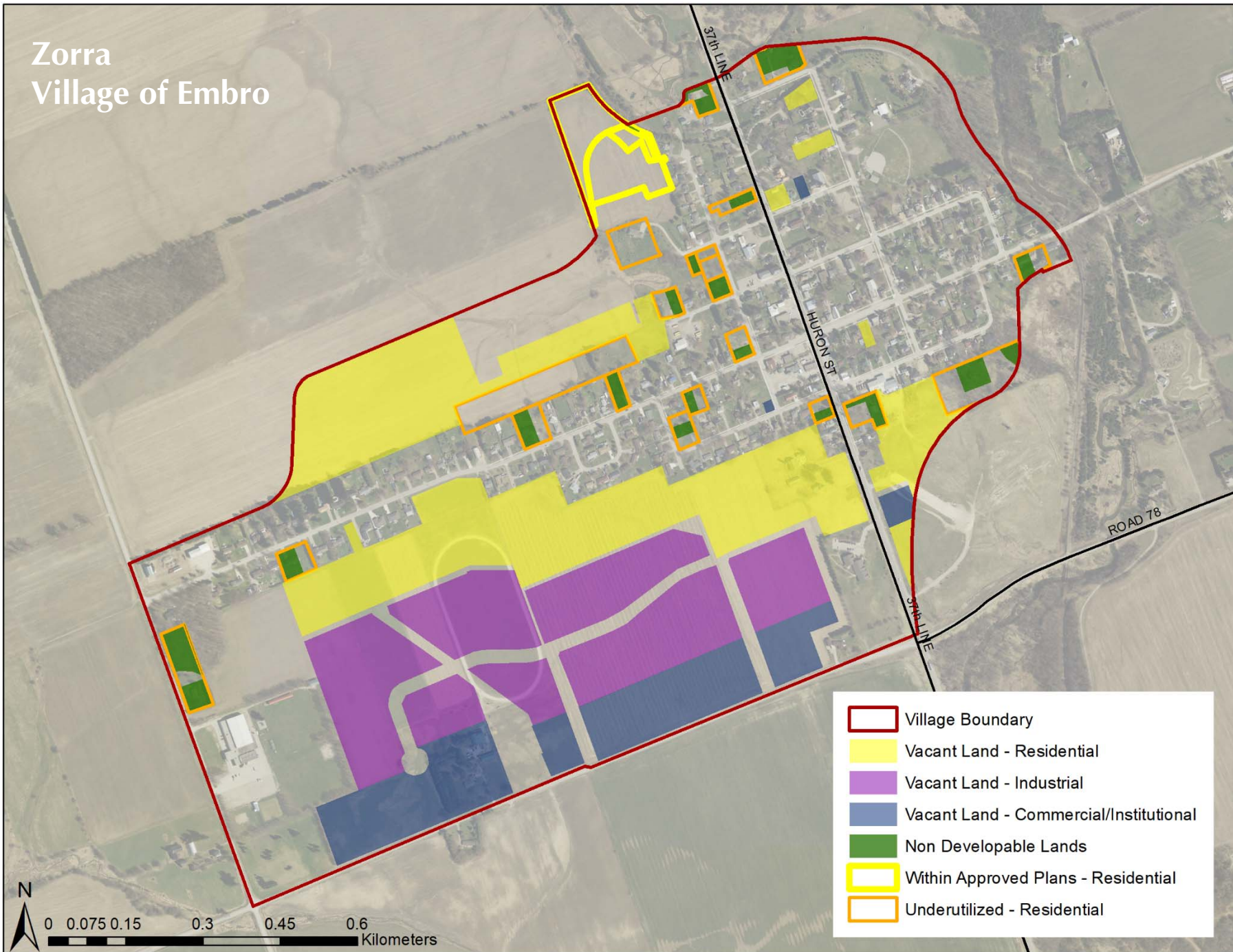


- Municipal Boundary
- Vacant Land - Residential
- Vacant Land - Industrial
- Vacant Land - Commercial/Institutional
- Non Developable Lands
- Within Approved Plans - Residential
- Within Approved Plans - Industrial
- Underutilized - Residential
- Underutilized - Industrial
- Underutilized - Commercial/Institutional

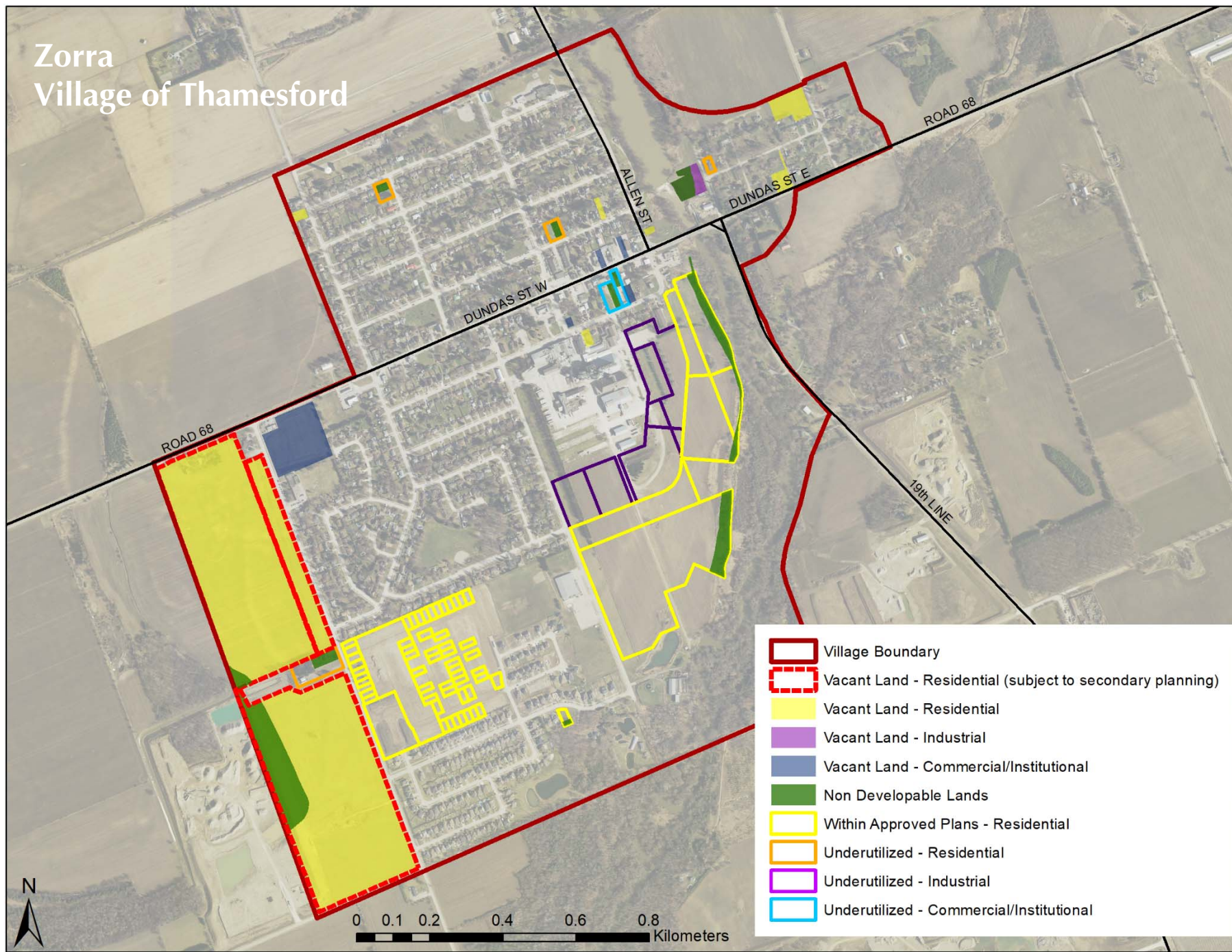




Zorra Village of Embro



Zorra Village of Thamesford



- Village Boundary
- Vacant Land - Residential (subject to secondary planning)
- Vacant Land - Residential
- Vacant Land - Industrial
- Vacant Land - Commercial/Institutional
- Non Developable Lands
- Within Approved Plans - Residential
- Underutilized - Residential
- Underutilized - Industrial
- Underutilized - Commercial/Institutional

