

EXECUTIVE SUMMARY

This report provides the results of the Oxford County Phase One Comprehensive Review, including County-wide population, household and employment forecasts, Area Municipal growth allocations 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 initiatives in the County.

Key findings include:

- Oxford County has continued to grow over recent Census periods, adding 10,700 residents, 7,000 households and nearly 9,500 jobs over the 2001 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 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 larger 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 8,700 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.

- Forecasts of population, housing and employment were prepared to provide a basis for updating the information in the *Oxford County Official Plan* to reflect a 2039 horizon. The forecasts provided key input to a land needs assessment which identify the twenty-year land need within Oxford's Area Municipalities. Some potential shortages to meet the 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 47,200 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.
- Consistent with Provincial planning policy, most growth is directed to fully serviced settlement areas. The long-term pattern of growth and the existing concentrations of households and employment within the County are expected to generally continue and Area Municipalities are anticipated to experience growth in population, households and employment over the forecast.
 - The greatest share of forecast growth, 50% of County-wide household growth over the 2016 to 2046 horizon, has been allocated to the City of Woodstock, being the primary urban centre in the County and where most 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 household forecast.
 - The balance 25% was allocated throughout the Townships, with serviced settlement areas being where most growth in the rural area municipalities is expected to occur.
- A 2019 Oxford County Vacant Land Inventory was prepared as a basis for assessing land need in Oxford's serviced settlement areas for a twenty-year timeframe to a 2039 planning horizon.
 - The results of the 2019 residential land supply inventory indicate 257 ha of net vacant developable residential land County-wide;

and 180 net ha of vacant land under approved plans of subdivision

- The results of the industrial land supply inventory indicate 436 net ha of long-term development industrial land supply available to accommodate employment growth in the County.
- A land needs assessment was undertaken for residential and employment uses.
- The results of the residential land needs assessment indicate a potential additional land need to accommodate the residential growth outlook to 2039 in some Area Municipalities:
 - 225 gross developable ha in the City of Woodstock,
 - 75 gross developable ha Town of Ingersoll and
 - 35 gross developable ha Townships of East Zorra-Tavistock; and
 - 15 gross developable ha South-West Oxford.
- A potential need for additional industrial land to meet the twenty-year employment growth outlook was also identified for some Area Municipalities:
 - 317 gross developable ha in the City of Woodstock
 - 107 gross developable ha in the Town of Ingersoll
 - 12 gross developable ha in the Township of East Zorra-Tavistock