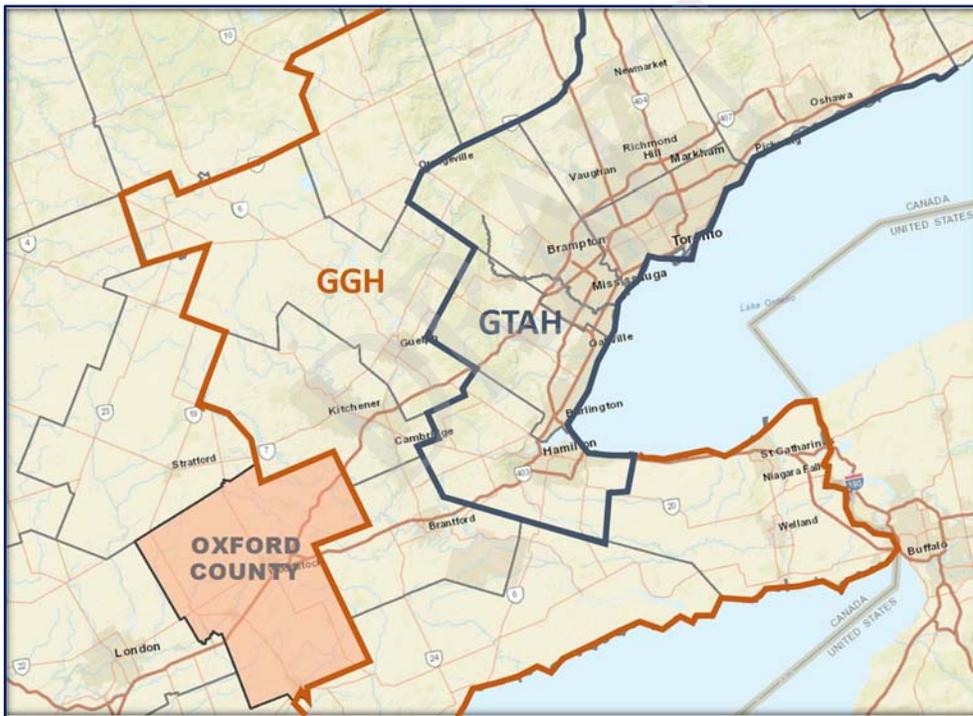


## I INTRODUCTION

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The County of Oxford is an upper-tier municipality in Southwestern Ontario covering approximately 2,000 km<sup>2</sup>. 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), 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**



In 2016, the County's population<sup>1</sup> was 114,000 and it was residing in 44,300 households. The County has a strong, largely industrial and agricultural employment base and continues to experience job growth despite declining

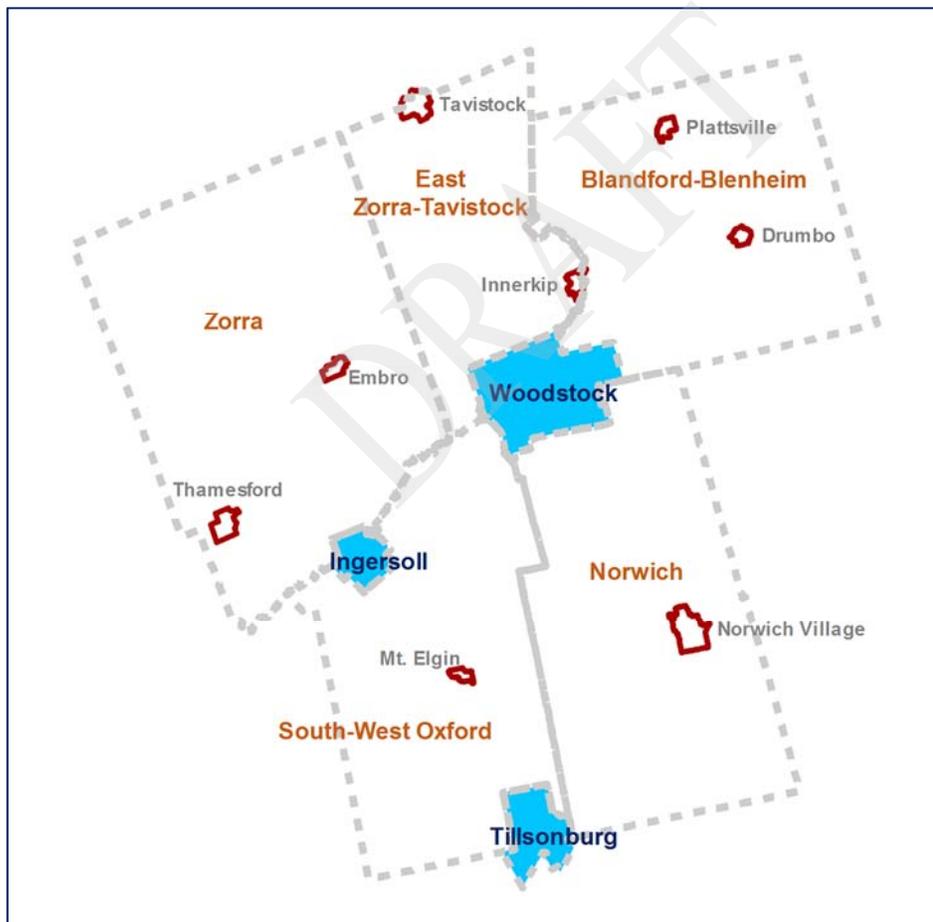
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<sup>1</sup>Total population including Census net undercoverage.

employment elsewhere in the broader economic region in recent times. Oxford is home to a number of key industrial employers which 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 rural Townships of Blandford-Blenheim, East Zorra-Tavistock, Norwich, South-west Oxford and Zorra. A number of municipally serviced villages, un-serviced villages and rural clusters are spread across the largely agricultural landscape.

**Map 2: Area Municipalities and Serviced Villages, Oxford County**



## **A. PLANNING POLICY FRAMEWORK**

Planning and growth management in Oxford is coordinated in 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 urban development in Ontario while protecting and enhancing natural heritage features. The Province released an updated PPS in 2014, including a number of strengthened directions for directing the distribution of growth, the protection of natural and agricultural lands, planning for employment lands and other key growth management policies. The PPS 2014 also place greater emphasis on the unique characteristics and planning challenges for rural communities.

The distribution of growth within County jurisdictions must be consistent with PPS policies. As such, most growth and development is to be directed to serviced settlement areas, which are those with a broad range of land uses and full municipal water and wastewater services. More limited growth is directed to rural settlement areas, which are largely residential and have partial or private services.

The *Oxford County Official Plan* is the main vehicle for implementing the PPS. 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 Area Municipalities in Oxford and policies for how growth is to be accommodated.

## **B. BACKGROUND AND STUDY PURPOSE**

Hemson Consulting Ltd. is currently assisting the County with a Phase One Comprehensive Review. The study is being undertaken in the following components:

- preparation of County-wide population, household and employment forecasts and Area Municipal growth allocations; and
- 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 inform potential updates to the *Oxford County Official Plan*, including extending the growth projections to a 2039 planning horizon. 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 in recent years relative to longer-term historical trends. Thus a comprehensive review of how the County is currently growing, as well as a reassessment of the long-term future outlook and land needs to accommodate growth, is both prudent and timely.

The Phase One Comprehensive Review, as well as providing a basis for assessing urban designated land need from 2019 to 2039, will also inform a range of land use planning and infrastructure studies.

### **C. REPORT CONTENTS**

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

- **Section 2** examines the level and distribution of recent residential growth and discusses demographic trends affecting the future growth outlook for Oxford;
- **Section 3** provides an overview of recent employment growth and economic change within the County;

- **Section 4** 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 5** discusses how the County-wide growth projections are allocated to each Area Municipality within Oxford and provides the resulting population, housing and employment projections to 2039 for use as a basis for planning under the *Oxford County Official Plan*;
- **Section 6** provides the methodology and results of an updated 2019 Oxford County Vacant Land Inventory and land needs assessment for the twenty-year planning period from 2019 to 2039. 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 7** provides conclusions and next steps in the Phase One Comprehensive Review.