

VI LAND NEEDS ASSESSMENT

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

As such, a land needs assessment was undertaken, including the preparation of a 2019 Oxford County Vacant Land Supply Inventory which provided a basis for assessing the sufficiency of the currently designated supply in the County's serviced settlement areas. The land supply mapping is provided in Appendix B.

A review of land supply in rural villages was also undertaken however limited growth is directed to the unserved settlement areas within the Townships.

A. 2019 OXFORD COUNTY VACANT LAND INVENTORY PREPARED AS A BASIS FOR ASSESSING LAND NEED TO 2039

An Oxford County 2019 Vacant Land Inventory was prepared by Hemson and updated taking into account County GIS data, ongoing consultation with County Planning staff and Area Municipal, review of underutilized properties, consideration of 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.

Some modest growth will also occur within the partially and unserved settlements in Oxford's rural townships, however the focus for growth and the primary subject of the land needs assessment are the more urban growth

centres of the city of Woodstock and Towns of Ingersoll and Tillsonburg and the serviced designated settlement areas of the rural Townships.

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 Google Earth desktop review, input received from County and Area Municipal staff, and additional analyses. The supply accounts for vacant, occupied, underutilized, constrained lands and vacant lands under plans of subdivision.

Non-developable lands were removed from the land supply were not considered in the growth capacity analysis and land needs assessment.

B. LAND SUPPLY INVENTORY INDICATES 257 NET VACANT DEVELOPABLE HA AVAILABLE TO ACCOMMODATE RESIDENTIAL GROWTH WITHIN OXFORD'S SERVICED SETTLEMENT AREAS

Following determination of a total vacant developable supply, a number of adjustments were made to the residential land areas 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 rural area municipalities was applied to residentially designated parcels greater in size than 0.2 ha to allow for subdivision, roads, 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 provides for some population-related employment uses to locate in residential areas, such as those jobs related with schools, libraries, institutional and neighbourhood commercial uses.

Underutilized 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 of development, and timing of these lands, if and when they may be available to market or 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 there may be some potential for these lands to accommodate limited development through intensification or redevelopment over the longer term. The results of the 2019 residential land supply inventory are provided in Tables 30 and 31 below, for vacant lands and remaining vacant lands in approved plans of subdivision. Results indicate 257 ha of net vacant developable residential land County-wide; and 180 net ha of vacant land under approved plans of subdivision.

Table 30 Vacant Residential Serviced Settlement Area Land Supply, 2019

Residential Land Supply within Serviced Settlement Areas Oxford County, Vacant Land Inventory, 2019					
Area Municipality	Vacant Land Supply	Non-Developable	Gross Developable Supply	Net-to-Gross Adjusted	Net Vacant Developable Supply
Blandford-Blenheim	56	19	36	61%	22
East Zorra-Tavistock	29	2	27	62%	17
Ingersoll	25	6	19	60%	11
Norwich	65	9	57	60%	34
South-West Oxford	12	0	12	61%	7
Tillsonburg	192	18	174	55%	96
Woodstock	125	53	72	56%	41
Zorra	51	2	49	60%	29
Oxford County	555	110	445		257

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

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, stormwater management pods, rights-of-way and other infrastructure and public facilities.

Table 31 Vacant Lands in Approved Plans of Subdivision, 2019

Residential Land Supply Within Approved Plans Oxford County by Area Municipality, 2019				
Area Municipality	Vacant Land within Plans of Subdivision (Gross ha)	Net-to-Gross Adjustment	Net Developable Ha	Planned # Units
Blandford-Blenheim	11	78%	8	143
East Zorra-Tavistock	23	62%	14	279
Ingersoll	21	61%	13	360
Norwich	26	62%	16	348
South-West Oxford	6	60%	4	81
Tillsonburg	55	70%	39	1,003
Woodstock	99	61%	60	1,818
Zorra	42	63%	27	533
Oxford County	282	64%	180	4,565

C. 436 NET HA OF VACANT DEVELOPABLE INDUSTRIAL LANDS AND 100 NET HA OF COMMERCIAL LAND COUNTY-WIDE TO ACCOMMODATE JOB GROWTH

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 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 designated industrial supply in order to account for parcels which may not develop over the long-term, vacancy and underutilization.

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.

Table 32 Vacant Industrial Land Supply, 2019

Industrial Land Supply (ha) Oxford County, 2019			
Area Municipality	Gross Developable Supply¹	Net Vacant Developable Supply²	Adjusted for Underutilization and Long-term Vacancy³ (ha)
Blandford-Blenheim	24	20	16
East Zorra-Tavistock	11	9	7
Ingersoll	55	46	37
Norwich	52	43	34
South-West Oxford	26	21	17
Tillsonburg	114	94	75
Woodstock	337	278	222
Zorra	45	36	29
Oxford County	664	545	436

¹Environmental and other non-developable lands have been removed.

²Net-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, rights-of-way and servicing needs.

³20% adjustment is made to account for underutilization and long-term vacancy.

The land supply inventory also indicates roughly 100 net vacant ha of commercial and institutional designated lands available to accommodate primarily population-related employment. This type of employment growth is also accommodated within residential areas through the net to gross adjustments described in the section prior.

Table 33 Vacant Commercial Land Supply, 2019

Commercial and Institutional Land Supply (ha) Oxford County, Vacant Land Inventory, 2019					
Area Municipality	Vacant Land Supply	Non-Developable	Gross Developable Supply	Net-to-Gross Adjusted	Net Vacant Developable Supply
Blandford-Blenheim	3	0	3	100%	3
East Zorra-Tavistock	1	0	1	100%	1
Ingersoll	22	0	22	82%	18
Norwich	2	0	2	100%	2
South-West Oxford	0	0	0	0%	0
Tillsonburg	20	1	20	91%	18
Woodstock	61	7	54	91%	49
Zorra	14	0	14	82%	12
Oxford County	123	8	115	89%	102

D. PARTIALLY AND UN-SERVICED VILLAGES WILL ALSO ACCOMMODATE SOME MODEST GROWTH

A supply analysis was also undertaken of vacant lands in Oxford's partially and un-serviced villages, which provided input to the preparation of the growth allocations for rural area municipalities. Consideration was given to the degree to which vacant lands in the un-serviced areas might reasonably accommodate forecasted growth, however consistent with Provincial land use planning policy direction, most growth is directed to serviced settlement areas and these are the focus in the land needs assessment. A key result of the Phase One Comprehensive Review is to identify the serviced settlement area land need to accommodate the twenty-year growth outlook from 2019 to 2039.

E. LAND NEEDS ASSESSMENT INDICATES SOME POTENTIAL SHORTAGES AT THE AREA MUNICIPAL LEVEL TO ACCOMMODATE GROWTH FORECAST TO 2039

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 growth 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 Comprehensive Review is also determined.

1. Additional Residential Lands Could be Justified

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 density assumptions were determined for residential and non-residential lands in order to estimate the capacity of the vacant developable settlement area land supply within Oxford's area municipalities and County-wide. For residential lands the following average residential densities were applied:

- 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 average densities were applied to the net vacant developable supply to estimate a capacity for unit growth on currently designated settlement area lands. Planned units on vacant lands within approved plans of subdivision 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 a net land area needed 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. The results are shown in Tables 33 and 34 below.

Table 34 Estimated Residential Unit Growth Potential within Serviced Settlement Areas

Estimated Residential Unit Growth Capacity within Serviced Settlement Areas Oxford County by Area Municipality, 2019					
Area Municipality	Residential Supply (Net Vacant Developable Ha)	Average Density Assumption (Units / Net ha)	Estimated Unit Potential on Vacant Lands Not Within Approved Plans	Number of Units in Approved Plans of Subdivision	Total Estimated Unit Potential
Blandford-Blenheim	22	17	380	143	520
East Zorra-Tavistock	17	17	280	279	560
Ingersoll	11	22	250	360	610
Norwich	34	17	580	348	930
South-West Oxford	7	17	120	81	200
Tillsonburg	96	22	2,110	1,003	3,110
Woodstock	41	28	1,140	1,818	2,960
Zorra	29	17	490	533	1,020
Oxford County	257		5,350	4,565	9,910

Table 35 Residential Land Need Assessment Results, 2019-2039

Estimated Residential Land Need within Serviced Settlement Areas to 2039 Based on Est. Unit Potential and Forecast Housing Growth, 2019-2039 Oxford County by Area Municipality					
Area Municipality	Estimated Unit Potential (# of units)	Forecast 2019-2039 Unit Growth	Difference (Est. Unit Potential less Unit Growth)	Potential Surplus + or Shortage (-) (Net ha) to 2039	Estimated Residential Land Need to 2039: Gross Developable Ha
Blandford-Blenheim	520	510	10	1	-
East Zorra-Tavistock	560	910	-350	(21)	35
Ingersoll	610	1,520	-910	(41)	75
Norwich	930	740	190	11	-
South-West Oxford	200	360	-160	(9)	15
Tillsonburg	3,110	1,650	1,460	66	-
Woodstock	2,960	6,420	-3,460	(124)	225
Zorra	1,020	420	600	35	-
Oxford County	9,910	12,530			

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 the green column on Table 35 above.

2. Industrial Land Need Also Identified

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. Based on this, the total estimated job growth on industrial lands by Area Municipality is shown in Table 36 below.

Table 36 Estimated 2019-2039 Job Growth on Employment Lands by Area Municipality

Estimated Job Growth on Designated Employment (Industrial) Lands Oxford County by Area Municipality, 2019-2039							
Area Municipality	Employment Land Employment			Population-Related Employment			Total Est. Job Growth on Employment Lands
	2019-2038 Growth (# of Jobs)	Share to Employment Land	Est. 2019 to 2039 Job Growth on Employment Lands	2019-2039 Growth on Employment Lands (# of Job)	Share to Employment Lands	Est. 2019 to 2039 Job Growth on Employment Lands	
Blandford-Blenheim	70	95%	67	106	5%	5	70
East Zorra-Tavistock	95	95%	90	251	5%	13	100
Ingersoll	1,244	95%	1,182	642	5%	32	1,210
Norwich	149	95%	142	220	5%	11	150
South-West Oxford	35	95%	33	95	5%	5	40
Tillsonburg	608	95%	578	732	5%	37	610
Woodstock	5,050	95%	4,798	2,930	5%	147	4,940
Zorra	80	95%	76	71	5%	4	80
Oxford County	7,331		6,964	5,047		0	6,960

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 based on consultation with County Planning staff and Area Municipal staff.

For each Area Municipality, the density assumption was applied to the estimated job growth on industrial lands identified in Table 36 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 developable land area that would be required. The results are provided in Table 37 below.

Table 37 Industrial Land Need Assessment Results, 2019-2039

Estimated Industrial Land Need, Oxford County by Area Municipality, 2019-2039						
Area Municipality	Estimated Job Growth On Employment Lands	Average Density Estimate	Estimated Land Need (Net ha)	Net Developable Industrial Land Supply (Net ha)	Difference (Land Need less Land Supply) Net ha	Estimated Additional Developable Land Need to 2039 (Gross ha)
Blandford-Blenheim	70	7	10	16	6	0
East Zorra-Tavistock	100	7	14	7	-7	12
Ingersoll	1,210	12	101	37	-64	107
Norwich	150	7	21	34	13	0
South-West Oxford	40	7	6	17	11	0
Tillsonburg	610	12	51	75	24	0
Woodstock	4,940	12	412	222	-190	317
Zorra	80	7	11	29	17	0
Oxford County	6,960		626	436		

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 Township of East Zorra-Tavistock, shown in the grey column on Table 37 above.