

V AREA MUNICIPAL GROWTH ALLOCATIONS

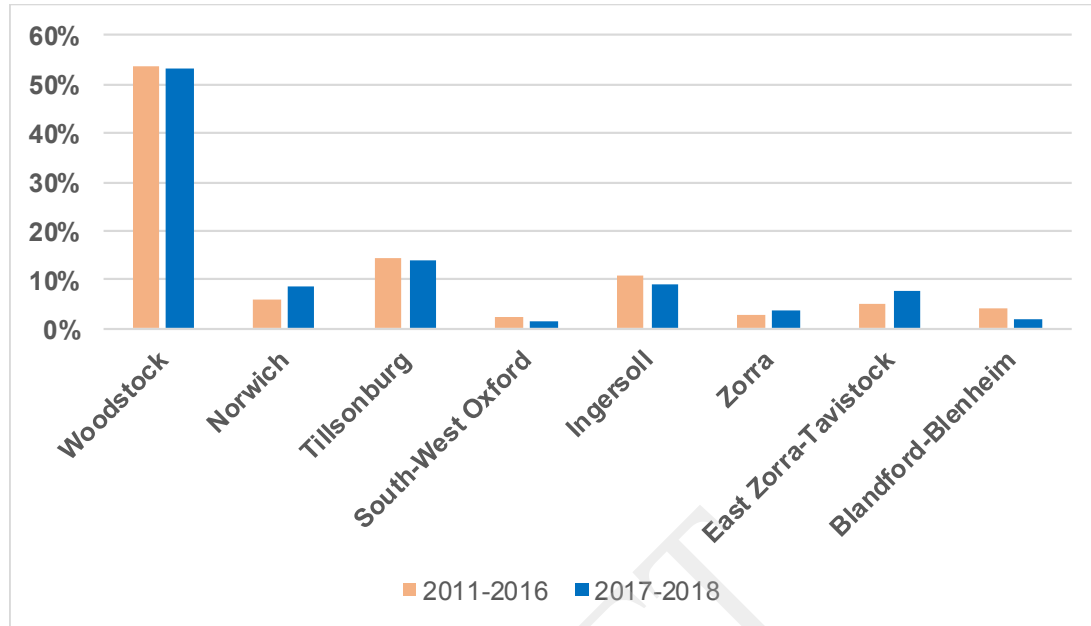
The forecasts at the County-wide level are allocated to Area Municipalities within Oxford to provide a basis for managing growth and assessing land need within the County's serviced settlement areas to accommodate the residential and employment growth outlook. This section provides the results of the local allocations of forecast housing, population and employment growth by Area Municipality.

A. DISTRIBUTION OF GROWTH BASED ON HOUSING

The County-wide residential forecasts are distributed to by Area Municipality based on shares of forecast household growth, which in turn drives the population growth outlook.

The distribution of forecasted growth within Oxford was undertaken giving consideration to a range of factors including 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, 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.

Figure 11 below illustrates shares of recent residential building permits by Area Municipality which reinforce the longer-term pattern of growth in the County, with most growth concentrated in the City of Woodstock, more moderate growth in the Towns of Ingersoll and Tillsonburg and the balance of modest growth throughout the Townships.

Figure 11: Shares of County-wide Residential Building Permits, 2011-2016; 2016-2018

B. MOST GROWTH CONCENTRATED IN WOODSTOCK BUT ALL AREA MUNICIPALITIES ANTICIPATED TO EXPERIENCE GROWTH OVER FORECAST HORIZON

Historical and recent development patterns in the County are anticipated to continue. As such, 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 the household forecast. The balance 25% has been allocated throughout the Townships, with serviced settlement areas being where most growth in the rural area municipalities is expected to occur.

Table 19 provides the shares of forecasts County-wide housing growth by Area Municipality. Tables 20 through 25 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 forecast by Area Municipality are provided in Appendix A.

Table 19

Area Municipal Shares of County-wide Forecast Housing Growth, 2016-2041	
Woodstock	51%
Norwich	6%
Tillsonburg	13%
South-West Oxford	3%
Ingersoll	12%
Zorra	3%
East Zorra-Tavistock	7%
Blandford-Blenheim	4%
Oxford County	100%

Table 20 Forecast Total Households by Area Municipality

Forecast Total Occupied Households, Allocation by Area Municipality County of Oxford, 2016-2046								
Municipality	Total Households by Area Municipality							Growth 2016-2041
	2016	2021	2026	2031	2036	2041	2046	
Woodstock	17,150	19,140	20,750	22,330	23,870	25,220	26,510	8,070
Norwich	3,710	3,940	4,120	4,300	4,480	4,640	4,780	930
Tillsonburg	7,130	7,640	8,050	8,450	8,850	9,200	9,540	2,070
South-West Oxford	2,700	2,810	2,900	2,990	3,080	3,150	3,220	450
Ingersoll	5,080	5,580	5,950	6,320	6,690	7,020	7,330	1,940
Zorra	3,070	3,240	3,340	3,440	3,530	3,620	3,710	550
East Zorra-Tavistock	2,710	2,990	3,210	3,440	3,660	3,840	4,020	1,130
Blandford-Blenheim	2,730	2,890	3,010	3,140	3,270	3,380	3,490	650
Oxford County	44,280	48,230	51,330	54,410	57,430	60,070	62,600	15,790

Source: Hemson Consulting Ltd.

Table 21 Forecast Total Population by Area Municipality

Forecast Total Population (Including Census Net Undercoverage) Allocation by Area Municipality County of Oxford, 2016-2046								
Municipality	Total Population by Area Municipality							Growth 2016-2041
	2016	2021	2026	2031	2036	2041	2046	
Woodstock	42,040	46,620	50,480	54,470	58,480	62,250	65,950	20,210
Norwich	11,310	11,850	12,320	12,820	13,360	13,890	14,390	2,580
Tillsonburg	16,310	17,380	18,280	19,240	20,240	21,220	22,150	4,910
South-West Oxford	7,880	8,140	8,380	8,650	8,910	9,120	9,330	1,240
Ingersoll	13,110	14,240	15,130	16,090	17,070	18,030	18,960	4,920
Zorra	8,360	8,740	8,990	9,250	9,530	9,830	10,120	1,470
East Zorra-Tavistock	7,330	7,940	8,420	8,930	9,450	9,940	10,400	2,610
Blanford-Blenheim	7,600	7,980	8,300	8,650	9,020	9,400	9,760	1,800
Oxford County	113,940	122,890	130,300	138,100	146,060	153,680	161,060	39,740

Source: Hemson Consulting Ltd.

Total population including Census net undercoverage.

Table 22 Forecast Total Employment by Area Municipality

Forecast Total Employment, Allocation by Area Municipality County of Oxford, 2016-2046								
Municipality	Total Employment by Area Municipality							Growth 2016-2041
	2016	2021	2026	2031	2036	2041	2046	
Woodstock	25,430	28,440	30,040	31,690	33,720	36,050	38,730	10,620
Norwich	4,050	4,200	4,280	4,360	4,470	4,600	4,740	550
Tillsonburg	8,580	9,060	9,320	9,600	9,950	10,360	10,810	1,780
South-West Oxford	2,850	2,920	2,960	2,990	3,040	3,090	3,150	240
Ingersoll	8,990	9,710	10,080	10,470	10,950	11,510	12,150	2,520
Zorra	2,800	2,890	2,920	2,960	3,010	3,080	3,150	280
East Zorra-Tavistock	2,800	2,950	3,020	3,100	3,200	3,320	3,450	520
Blanford-Blenheim	1,820	1,910	1,950	1,990	2,050	2,120	2,210	300
Oxford County	57,320	62,080	64,570	67,160	70,390	74,130	78,390	16,810

Source: Hemson Consulting Ltd.

Table 23 Forecast Population-Related Employment by Area Municipality

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

Source: Hemson Consulting Ltd.

Table 24 Forecast Employment Land Employment by Area Municipality

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

Source: Hemson Consulting Ltd.

Table 25 Forecast Other Rural Based Employment by Area Municipality

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

Source: Hemson Consulting Ltd.

C. 2019 TO 2039 OUTLOOK PROVIDES BASIS FOR ASSESSING LAND NEED

The forecasts are prepared by five-year intervals corresponding with the Census. However, for the purposes of assessing land need in the County, the forecasts have been annualized in order to identify growth anticipated over the 20-year planning period from 2019 to 2039.

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

For the purpose of assessing industrial land need in the County, the employment land employment and population-related employment categories are the focus, as most employment land employment occurs on industrial land,

along with a marginal share of population-related employment. Rural based employment by definition does not occur on urban designated industrial lands.

Annualized results are shown on Tables 26 through 28 below and summarized on Table 29.

Table 26 Annualized Household Forecast by Area Municipality

Annualized Household Forecast, Oxford County by Area Municipality 2016-2021 and 2036-2041								
Year	Total Households by Area Municipality							
	Woodstock	Ingersoll	Tillsonburg	Blandford-Blenheim	East Zorra-Tavistock	Norwich	South-West Oxford	Zorra
2016	17,150	5,080	7,130	2,730	2,710	3,710	2,700	3,070
2017	17,530	5,180	7,230	2,760	2,760	3,750	2,720	3,100
2018	17,840	5,260	7,310	2,790	2,800	3,790	2,740	3,130
2019	18,090	5,320	7,370	2,810	2,840	3,820	2,750	3,150
2020	18,300	5,370	7,420	2,830	2,870	3,840	2,760	3,170
2021	19,140	5,580	7,640	2,890	2,990	3,940	2,810	3,240
2036	23,870	6,690	8,850	3,270	3,660	4,480	3,080	3,530
2037	22,840	6,450	8,590	3,290	3,700	4,510	3,090	3,550
2038	22,050	6,270	8,390	3,310	3,730	4,540	3,100	3,560
2039	21,430	6,130	8,230	3,320	3,750	4,560	3,110	3,570
2040	20,950	6,020	8,110	3,330	3,770	4,580	3,120	3,580
2041	25,220	7,020	9,200	3,380	3,840	4,640	3,150	3,620
2019-2039 Growth	3,340	810	860	510	910	740	360	420

Source: Hemson Consulting Ltd.

Table 27 Annualized Employment Land Employment Forecast by Area Municipality

Annualized Employment Land Employment Forecast, Oxford County by Area Municipality 2016-2021 and 2036-2041								
Year	Employment Land Employment by Area Municipality							
	Woodstock	Ingersoll	Tillsonburg	Blandford-Blenheim	East Zorra-Tavistock	Norwich	South-West Oxford	Zorra
2016	15,800	6,580	5,170	620	970	1,640	1,240	1,120
2017	16,168	6,673	5,213	624	978	1,650	1,242	1,126
2018	16,469	6,749	5,248	627	984	1,658	1,244	1,131
2019	16,710	6,810	5,280	630	990	1,660	1,250	1,130
2020	16,909	6,859	5,302	632	994	1,666	1,250	1,134
2021	17,730	7,060	5,390	640	1,010	1,690	1,250	1,150
2036	21,060	7,880	5,800	690	1,070	1,790	1,280	1,200
2037	21,344	7,951	5,836	694	1,076	1,798	1,282	1,204
2038	21,574	8,008	5,865	697	1,081	1,804	1,284	1,207
2039	21,760	8,054	5,888	700	1,085	1,809	1,285	1,210
2040	21,910	8,091	5,906	702	1,088	1,813	1,286	1,212
2041	22,520	8,240	5,980	710	1,100	1,830	1,290	1,220
2019-2039 Growth	5,050	1,244	608	70	95	149	35	80

Source: Hemson Consulting Ltd.

Table 28 Annualized Population-Related Forecast by Area Municipality

Annualized Population-Related Employment Forecast, Oxford County by Area Municipality 2016-2021 and 2036-2041								
Year	Population-Related Employment by Area Municipality							
	Woodstock	Ingersoll	Tillsonburg	Blandford-Blenheim	East Zorra-Tavistock	Norwich	South-West Oxford	Zorra
2016	9,630	2,410	3,410	730	1,090	1,340	760	710
2017	9,837	2,456	3,460	738	1,109	1,354	766	718
2018	10,006	2,494	3,501	744	1,125	1,365	771	724
2019	10,143	2,524	3,534	749	1,138	1,374	775	729
2020	10,254	2,549	3,561	753	1,148	1,381	778	733
2021	10,710	2,650	3,670	770	1,190	1,410	790	750
2036	12,660	3,070	4,160	840	1,350	1,560	860	810
2037	12,828	3,109	4,203	846	1,366	1,574	864	810
2038	12,964	3,141	4,238	851	1,379	1,585	867	810
2039	13,073	3,166	4,266	855	1,389	1,594	870	810
2040	13,161	3,187	4,289	858	1,397	1,601	872	810
2041	13,520	3,270	4,380	870	1,430	1,630	880	810
2019-2039 Growth	2,930	642	732	106	251	220	95	81

Source: Hemson Consulting Ltd.

Table 29 2019-2039 Forecast Growth for Assessing Serviced Settlement Area Land Need

Summary 2019-2039 Growth in Households and Employment*			
Area Municipality	Households	Employment Land Employment	Population Related Employment
Woodstock	3,340	5,050	2,930
Ingersoll	810	1,244	642
Tillsonburg	860	608	732
Blandford-Blenheim	510	70	106
East Zorra-Tavistock	910	95	251
Norwich	740	149	220
South-West Oxford	360	35	95
Zorra	420	80	81
Oxford County	7,950	7,331	5,057