Growth Analysis and Land Needs Assessment

Oxford County

Final Report

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In association with: DILLON CONSULTING

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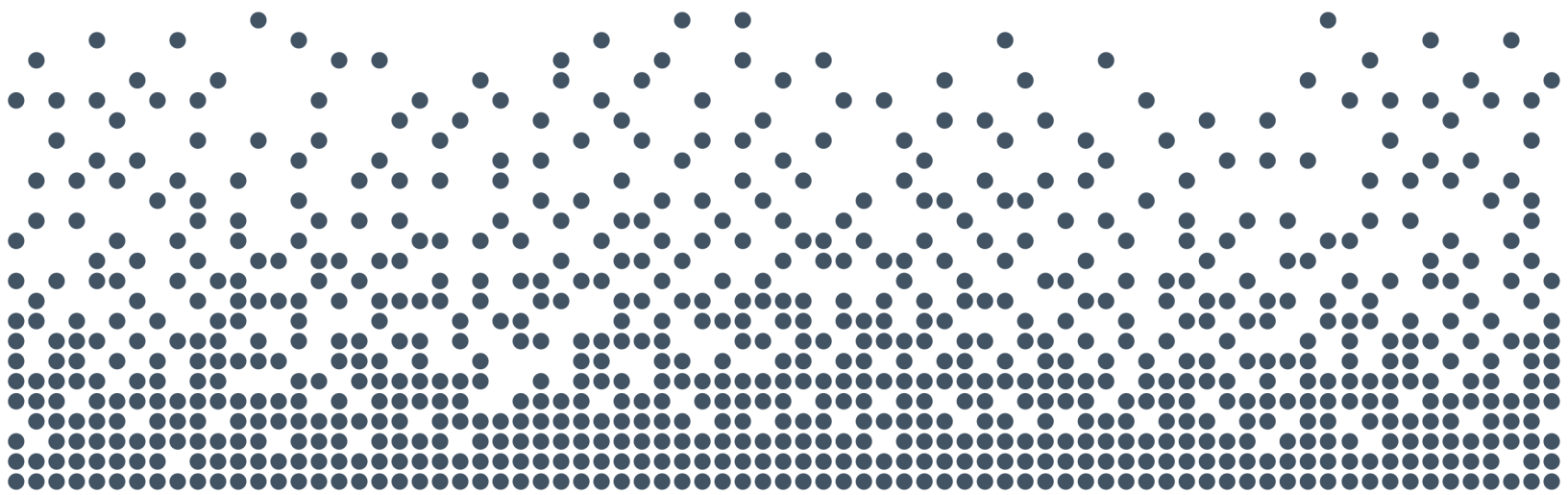
List of Acronyms and Abbreviations

B.U.A.	**Built-up Area**
F.U.G.	**Future Urban Growth**
G.D.P.	**Gross Domestic Product**
G.F.A.	**Gross Floor Area**
G.G.H.	**Greater Golden Horseshoe**
G.T.H.A.	**Greater Toronto Hamilton Area**
I.C.I.	**Industrial, Commercial and Institutional**
L.N.A.	**Land Needs Assessment**
N.F.P.O.W.	**No Fixed Place of Work**
M.O.F.	**Ministry of Finance**
N.P.R.	**Non-Permanent Residents**
O.P.	**Official Plan**
O.P.R.	**Official Plan Review**
O.P.A.	**Official Plan Amendment**
P.M.G.	**Provincial Methodology Guideline**
P.M.I.	**Purchasing Managers' Index**
P.P.S., 2024	**Provincial Planning Statement**
P.P.U.	**Persons Per Unit**

List of Acronyms and Abbreviations (Cont'd)

S.A.B.E.	**Settlement Area Boundary Expansion**
U.S.	**United States**



Executive Summary

Executive Summary

Watson & Associates Economists Ltd. (Watson), in association with Dillon Consulting Ltd., was retained by Oxford County in 2024 to undertake a Growth Analysis and Land Needs Assessment. The primary purpose of this study is to ensure that evolving long-term development trends, disruptive factors, as well as future opportunities and challenges, are comprehensively assessed and reflected in the County's revised long-term growth outlook and land needs assessment for settlement areas. This foundational report forms a key background document for the County's Official Plan Review (O.P.R.). It also provides strategic planning policy recommendations with respect to updates to the long-term population, housing and employment growth forecast for the County and its Area Municipalities to the year 2061, residential intensification targets, long-term urban land needs for fully serviced settlement areas and other related planning policy directions.

Key components of this study include:

- Long-term total population and employment growth forecasts by major sector/land use category for the County within the context of provincial, regional, and local policy, evolving development trends, as well as economic and demographic drivers and disruptors. For the purposes of sensitivity testing, three long-term growth scenarios were explored, with a recommended growth scenario chosen.
- Long-term housing forecasts by structure type.
- Growth forecast allocations for the recommended scenario by:
    - Area Municipality;
    - Serviced Settlement Areas: Large Urban Centres and, Serviced Villages, which are further separated into Built-up Area (B.U.A.) and Greenfield Area; and
    - Unserviced Rural Settlement Areas and Rural Areas.
- A residential intensification analysis that identifies key priority areas – nodes and corridors for housing development, including an estimate of potential housing units within those areas.
- A Community Area land needs assessment that identifies urban land requirements over a 20-, 25- and 30-year horizon for the Large Urban Centres and Serviced Villages. This includes reviewing land requirements for residential, commercial and institutional land uses.

- An Employment Area land needs assessment that identifies land requirements over a 20-, 25- and 30-year horizon for industrial-type development within the Large Urban Centres and Serviced Villages.
- Planning policy recommendations to guide long-term growth, focusing on planning for housing intensification, residential and commercial/institutional development in designated growth areas (D.G.A.), Employment Areas and Settlement Area Boundary Expansion (S.A.B.E.). Furthermore, guidance is also provided with respect to potential land need and planning for certain 'dry' industrial uses within the County's rural areas.

Summary of Key Findings

This study provides a comprehensive assessment of Oxford County's long-term population, housing and employment growth potential and land needs for serviced settlement areas to the year 2061, within the context of local and regional economic conditions and growth drivers. A summary of key findings is provided below.

The Long-Term Population and Economic Growth Outlook for Oxford County is Very Positive

Oxford County is well-positioned to continue to attract and accommodate steady population and employment growth over the next several decades. A key driver of this long-term population and employment growth potential is the County's strategic geographic location within Southern Ontario. The County forms part of a broader market area (commuter-shed) which includes Waterloo Region and the Counties of Perth, Brant, Haldimand-Norfolk and the London-Middlesex Area. Location factors play a key role in the distribution of the dominant business clusters visible across Oxford County and the broader market area today, such as auto-manufacturing and transportation/warehousing, which are primarily located in proximity to the Highway 401 and 403 corridors and other major routes.

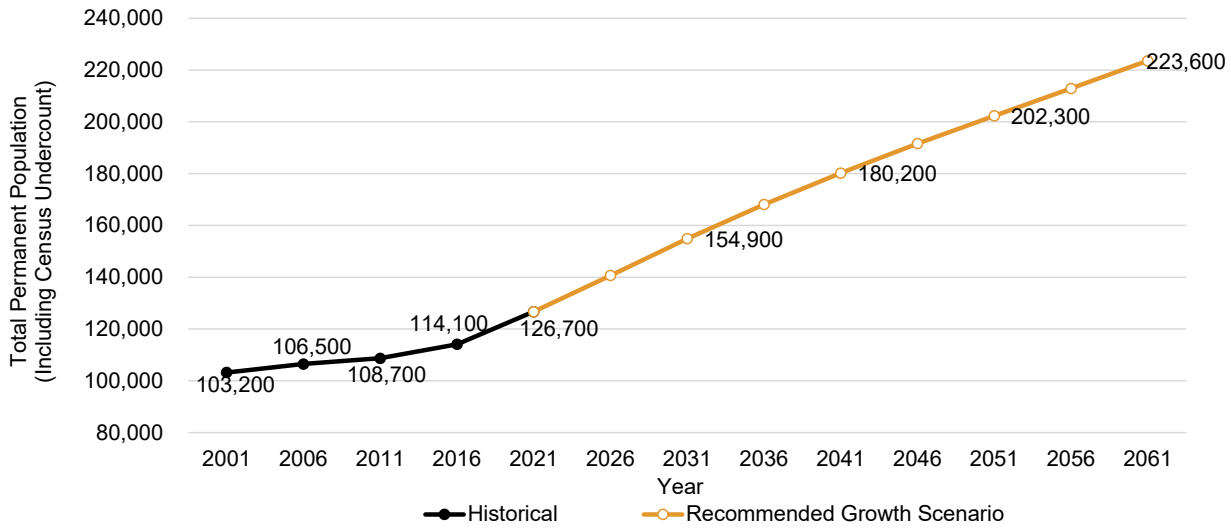
Oxford County continues to have a strong appeal to both businesses and residents. Again, this appeal is largely attributed to the County's geographic location, which offers opportunities for urban and rural living with proximity to employment and other amenities. These amenities include public and private schools, satellite post-secondary institutions, three main hospitals, access to municipal recreational facilities, and proximity to the County's rural countryside.

The population in Oxford County showed considerable growth between 2016 and 2024, primarily driven by outward growth pressures from the larger urban centres of the Greater Golden Horseshoe (G.G.H.). The rate of new housing development across Oxford County has notably picked up since 2015 and was further accelerated across Southwestern Ontario with the onset of the coronavirus disease (COVID-19) pandemic in March 2020. This acceleration in housing (which peaked between 2020 and 2021) was led by increased opportunities for remote/hybrid work, combined with growing employment growth opportunities within the London Economic Region and the surrounding commuter-shed. While the latest 2025 population projections from the Ministry of Finance (M.O.F.) show a reduction in the population projections for Southwestern Ontario compared to the 2023 and 2024 projections, Oxford County has continued to exhibit strong population growth when examining recent post-Censal estimates.

Recommended Population Growth Forecast

Oxford County has been identified by the Province as a high-growth region within Southern Ontario. Under the recommended population growth forecast, Oxford County's population is forecast to 223,600 by 2061, growing at an annual rate of 1.6%, considerably higher than what has been experienced over the past two decades.

Figure ES-1
Oxford County
Recommended Long-Term Population Forecast, 2001 to 2061



Note: Population includes net Census undercount estimated at 4.1% and figures have been rounded.
Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; forecast prepared by Watson & Associates Economists Ltd.

Similar to the province as a whole, the County will increasingly become more reliant on net migration as a source of population growth due to the aging local population. This aging trend places increasing demands on net migration as a source for population growth in the County, due to declining (and eventually negative) population growth from natural increase, i.e. births less deaths. The aging of the County's population is also anticipated to generate increasing needs for seniors' housing and other housing options to accommodate a growing share of older residents. Furthermore, an older population base can also place downward pressure on the labour force participation rate[1].

Over the long-term forecast period, approximately 85% of the new residents expected to arrive in the County through net migration are projected to be adults between the ages of 20 and 54 as well as children (i.e. under 19 years of age). These forecast net

[1] Defined by Statistics Canada as the proportion of the population aged 15 and older who are employed or looking for work.

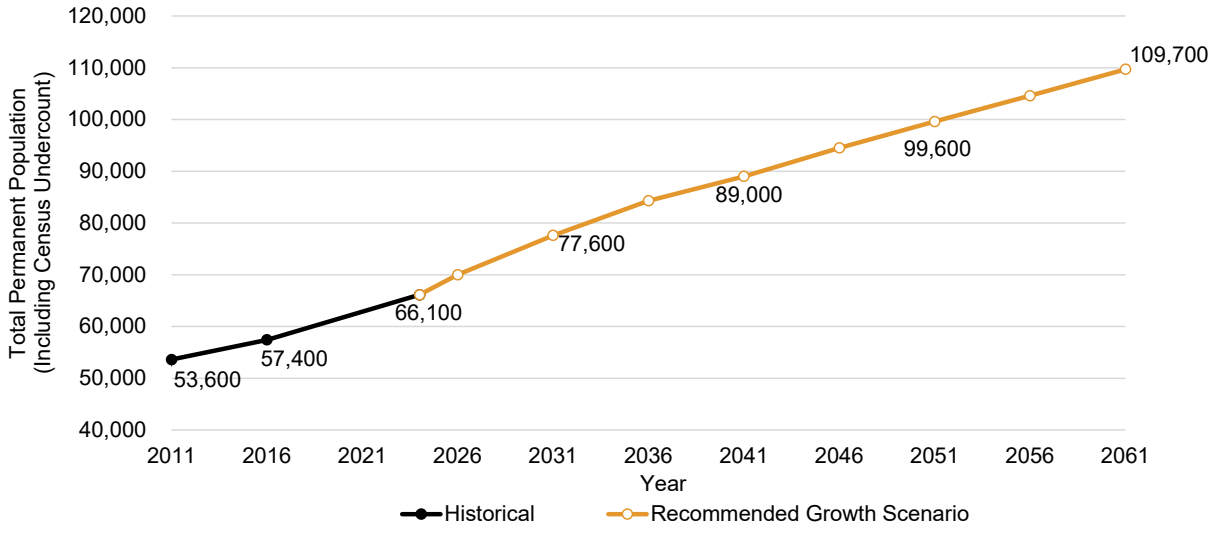
migration trends for Oxford County are expected to help mitigate the impacts of the County's aging population base.

Recommended Employment Growth Forecast

Under the recommended employment growth forecast, the employment base for the County is forecast to increase by 43,600 employees, reaching 109,700 jobs by 2061.

Of the total additional jobs identified for Oxford County over the long term, approximately 78% of jobs are anticipated to have a usual place of work, while the remaining 22% of new jobs are associated with work at home employment or off-site employees. With respect to employment by major sector, approximately 61% of job growth for the County is associated with services-producing sectors, while 39% of jobs are associated with goods-producing sectors (i.e. industrial and primary employment sectors).

Figure ES-2
Oxford County
Recommended Employment Forecast, 2011 to 2061



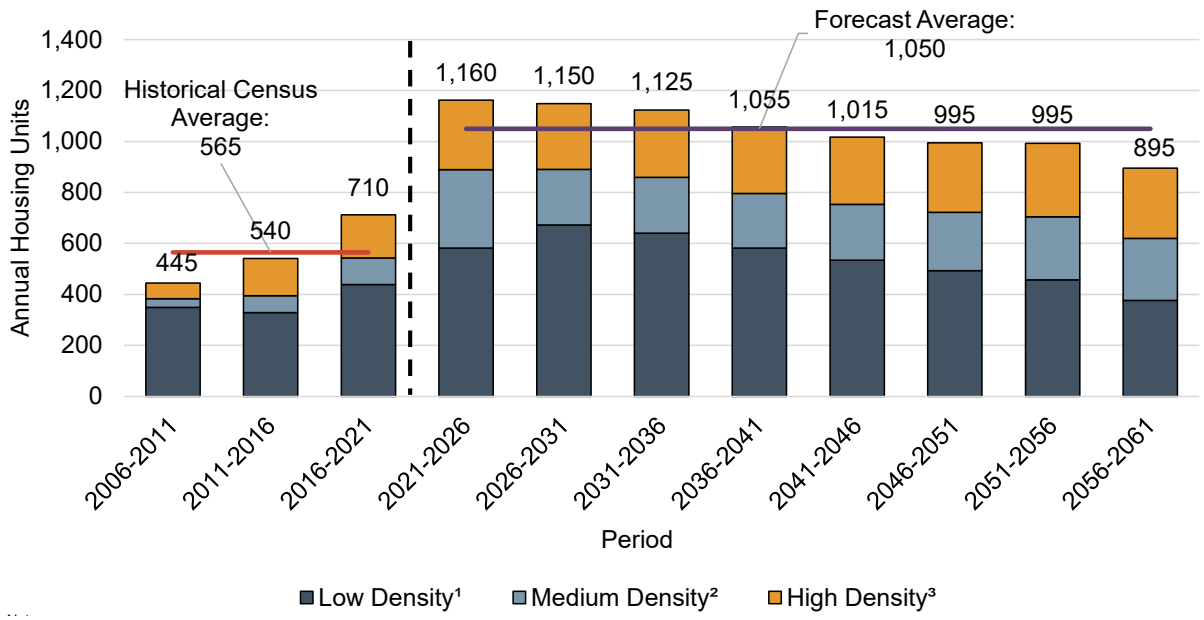
Note: Figures have been rounded. Total employment figures include work at home and no fixed place of work. Statistics Canada 2021 Census place of work employment data has been reviewed and has not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Source: 2011 to 2016 derived from Statistics Canada Census data; forecast prepared by Watson & Associates Economists Ltd.

A Broad Range of Housing Types are Anticipated to Accommodate Continued Permanent Population Growth Across the County

To accommodate the recommended long-term population growth forecast, the County will require the construction of just over 1,000 new housing units annually between 2021 and 2061 (refer to Figure ES-3). A fundamental planning policy objective at the provincial, County, and local municipal level is to plan for complete communities, including but not limited to offering a broad range of housing options and a diverse mix of local employment opportunities. This is important because it is recognized that the County has a role in attracting, accommodating and retaining local businesses by providing housing options to a growing regional labour force.

Accordingly, there will continue to be a growing need to attract and accommodate new and existing residents within the County across all ages and income groups, including young adults, new families, growing families with children, empty nesters and seniors. To achieve this objective, Oxford County, working with its Area Municipalities and stakeholders will need to continue to monitor the supply of available greenfield land as well as residential intensification opportunities that can accommodate a broad range of ownership and rental housing products across all housing types, including, but not limited to, grade-related ownership housing (i.e., single detached, townhouses), condominium apartments, purpose-built rental housing, seniors' housing and secondary units. Efforts to attract new residents must be linked to not only housing accommodation but also infrastructure, community services and urban amenities, and quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

Figure ES-3
Oxford County
Recommended Housing Forecast by Structure Type, 2006 to 2061



Source: Historical 2001 to 2021 data derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd

Summary of Population, Housing and Employment Growth Allocations by Area Municipality

While population and employment growth rates vary significantly by Area Municipality, the Area Municipalities within the County share several common attributes with respect to near- and longer-term population growth and development trends. These include the following:

- All Area Municipalities are forecast to experience higher total annual population, housing, and employment growth relative to historical trends experienced between 2011 and 2021.
- While COVID-19 was disruptive to the local economy, particularly in retail, accommodation and food, and tourism-based sectors, the economic recovery following the pandemic has been strong throughout the regional economy and within each of the Area Municipalities within the County.
- Continued regional employment opportunities, particularly those related to manufacturing, goods movement, agriculture, as well as other service-producing

and knowledge-based sectors, represent a key driver of future employment growth within the County and its Area Municipalities.

- All Area Municipalities within the County experienced relatively higher housing development activity during the height of the pandemic between 2020 and 2022. When considering long-term historical trends over the past two decades, most Area Municipalities within the County have experienced relatively higher levels of new housing construction activity since 2015. Looking forward, the rate of annual housing growth is anticipated to moderate from the peak levels experienced during the pandemic; however, all of the County's Area Municipalities are forecast to experience stronger housing demand relative to historical trends.
- Declining housing affordability, combined with a range of broader economic headwinds, including persistently high inflation rates, rising household debt, U.S. protectionist policies, increasing housing costs, and a slow short-term economic outlook is anticipated to dampen housing demand in the near term (i.e. next 12 to 24 months), relative to recent historical highs experienced during the past five years.
- Over medium to long-term (i.e. next 3+ years) housing demand across the County is anticipated to remain strong, driven by continued outward migration largely from the G.G.H. and City of London. Over the longer term (i.e. 10+ years), the average rate of annual housing development is anticipated to gradually slow (relative to the near-term forecast period) across all Area Municipalities within the County, driven by modestly slower regional and provincial economic growth associated with an aging population and regional labour force.
- Average P.P.U. levels are forecast to decline from 2021 to 2061 across all Area Municipalities.
- Low-density housing forms are forecast to continue to comprise a notable share of future housing growth; however, increasing market demand will exist for medium-density and high-density housing types across all Area Municipalities.

Figure ES-4 summarizes the County's recommended long-range population forecast by Area Municipality in ten-year increments between 2021 and 2061. Additional details regarding forecast housing and employment are provided in Chapter 5.

Figure ES-4
Oxford County
Recommended Population Forecast by Area Municipality, 2021 to 2061

Year	City of Woodstock	Town of Tillsonburg	Town of Ingersoll	Township of Blandford Blenheim	Township of East Zorra-Tavistock	Township of Norwich	Township of South-West Oxford	Township of Zorra	Oxford County
2011	38,800	15,700	12,500	7,600	7,000	11,000	7,800	8,300	110,900
2016	42,600	16,500	13,300	7,700	7,400	11,500	8,000	8,500	115,300
2021	48,700	18,800	14,300	7,900	8,200	11,900	8,000	9,000	126,700
2031	60,000	24,300	16,700	9,000	10,200	14,200	9,300	11,300	154,900
2041	71,100	30,100	19,100	9,900	10,800	15,400	9,900	13,000	180,200
2051	80,800	34,900	20,900	10,700	13,000	17,000	10,800	14,300	202,300
2061	90,300	39,300	22,600	11,400	14,400	18,500	11,600	15,500	223,600
Total Population Growth									
2011 to 2021	9,900	3,100	1,800	300	1,200	900	200	700	11,400
2021 to 2031	11,300	5,500	2,400	1,100	2,000	2,300	1,300	2,300	28,200
2021 to 2041	22,400	11,300	4,800	2,000	3,400	3,500	1,900	4,000	53,500
2021 to 2051	32,100	16,100	6,600	2,800	4,800	5,100	2,800	5,300	75,600
2021 to 2061	41,600	20,500	8,300	3,500	6,200	6,600	3,600	6,500	96,900
Annual Population Growth Rate									
2011 to 2021	2.3%	1.8%	1.4%	0.4%	1.6%	0.8%	0.3%	0.8%	1.6%
2021 to 2031	2.1%	2.6%	1.6%	1.3%	2.2%	1.8%	1.5%	2.3%	2.0%
2021 to 2041	1.9%	2.4%	1.5%	1.1%	1.7%	1.3%	1.1%	1.9%	1.8%
2021 to 2051	1.7%	2.1%	1.3%	1.0%	1.5%	1.2%	1.0%	1.6%	1.6%
2021 to 2061	1.6%	1.9%	1.2%	0.9%	1.4%	1.1%	0.9%	1.4%	1.4%

Note: Population includes net Census undercount estimated at approximately 4.1%. Figures may not add precisely due to rounding.
Source: 2011 to 2021 derived from Statistics Canada Census data; 2021 to 2061 forecast by Watson & Associates Economists Ltd.

Addressing the County's Settlement Area Land Needs

In order to assess urban land need requirements and intensification potential, the County has been categorized by the following broad geographic areas, which form key components of the County's community structure. These geographic areas include:

- Serviced **Settlement Areas:** includes fully serviced settlements with municipal water and wastewater servicing. This includes the Large Urban Centres (Woodstock, Ingersoll and Tillsonburg) and the eight Serviced Villages located in the Townships. Designated land in these settlement areas is assessed in the L.N.A.
- **Unserviced Rural Settlement Areas and Remaining Rural Areas:** include rural settlement areas with partial or no municipal servicing and the remaining rural area. There are numerous settlement areas across the County. The designated land supply in these settlement areas is not assessed in detail, given that further growth is primarily to be limited to minor infilling and smaller-scale developments within the existing designated settlement area boundaries.

With the County's Serviced Settlement Areas (Large Urban Centres and Serviced Villages), the following key policy areas are important to address:

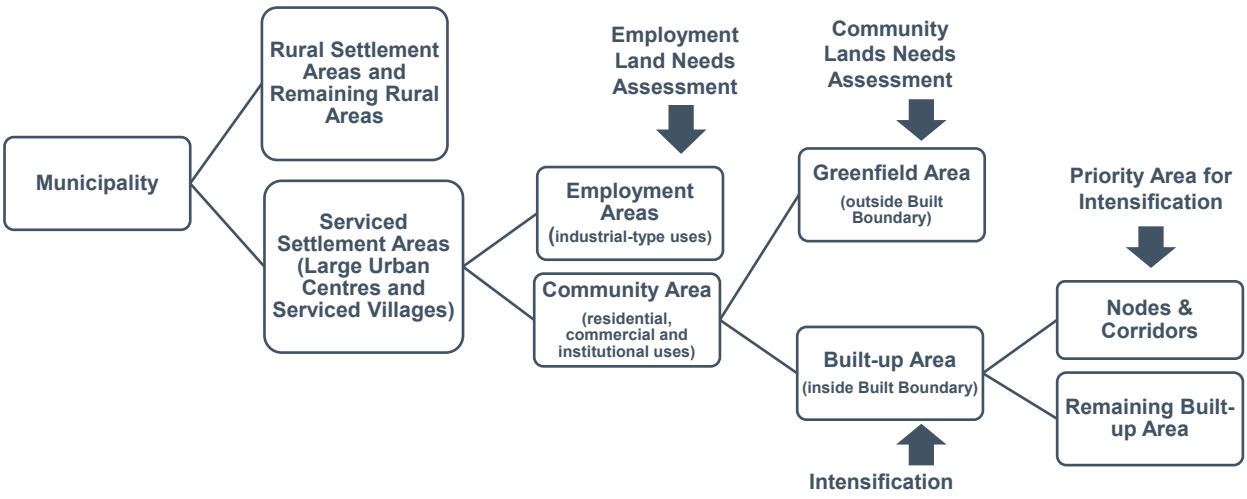
- **Community Areas:** these areas are planned to support a mix of uses, including residential, commercial and institutional development. Within the Community Area there are two sub-components:
    - **Built-up Area (B.U.A.):** the area within the Built Boundary. This area is largely already subdivided, and a large portion is developed or currently undergoing development. Development within this area represents intensification. Within the B.U.A., nodes and corridors (as discussed in Chapter 6) are identified as priority areas for intensification, representing lands that offer demand and supply opportunities to accommodate intensification. Opportunities to accommodate housing in the B.U.A. are assessed prior to identifying the remaining housing needs within Greenfield Areas, representing an "intensification-first" approach to accommodating housing growth.
    - **Greenfield Areas:** the area outside the Built Boundary but still designated within the urban settlement area boundary, that is designated for urban residential development. This is the area that is still largely undeveloped

and, includes land within the settlement area planned for future urban development. A key objective of the L.N.A. is to identify urban land that must be brought into the serviced settlement areas over the planning horizon. Additional land brought into a settlement area (i.e. through a Settlement Area Boundary Expansion) would be considered Greenfield Areas.

- **Employment Areas:** these areas are planned to accommodate industrial-type development that requires separation for sensitive uses, such as residential and major retail uses. They are protected under the P.P.S., 2024 for industrial use. The Employment Area assessment is discussed in Chapter 9.

ES-5 illustrates the County's community structure components. Key components are discussed below.

Figure ES-5
Oxford County
Community Structure



Source: Watson & Associates Economists Ltd.

Summary of Housing Intensification Analysis

A short-term intensification supply analysis has been prepared within defined areas, as informed by County and Area Municipal staff feedback. The intensification analysis was focused on identifying potential opportunities to accommodate growth within identified node and corridor areas over the short term (within approximately 10 years). The

intensification analysis is intended as a strategic “big picture” look at possible intensification sites within identified nodes/corridors, with the following notes:

- The analysis was focused on short-term opportunities with minimal constraints and was not intended to capture every possible opportunity for intensification.
- The analysis is not prescriptive. If an area was identified as having intensification potential, it does not imply that planning approvals would be granted or guarantee that a project would otherwise be feasible or proceed.
- Likewise, areas not identified in this initial analysis may still be candidates for future redevelopment.

The recommended intensification rates vary by municipality, ranging from 9% to 25%. This allocation was determined by assessing the supply and demand factors in each area. Key highlights are provided below.

- Large Municipalities have been allocated a 25% intensification rate.
- Townships generally are allocated a intensification rate of 15%, with two exceptions:
    - The Township of Zorra has a 25% allocation due to its significant intensification opportunities within existing, large approved residential developments.
    - The Township of South-West Oxford has a 9% allocation, reflecting the limited supply available in its single Serviced Village of Mount Elgin.

As market conditions evolve, the intensification analysis should be revisited over time to ensure alignment with long-range planning objectives and emerging opportunities. Monitoring intensification rates, overall growth, and updates to population and employment forecasts (which are typically revisited every five years) will be an important part of implementation.

Summary of Community Area Land Needs Assessment

Key findings regarding the Community Area (residential, commercial and institutional uses) land needs are as follows:

- It is estimated that the County requires an additional 390 hectares of Community Area lands over the 20-year period, increasing to approximately 819 hectares (approximately 2,020 acres) over the 30-year period.

- Six of the eight municipalities within the County will require an expansion to their Serviced Settlement Area(s) to accommodate Community Area uses, (e.g. parkland, commercial and institutional uses). Appendix F provides further details on the Community Area land requirements.
- Based on a review of the commercial and institutional land requirements, the Town of Tillsonburg, is forecast to require an additional 10 hectares (25 acres) of Community Area lands for commercial and institutional purposes over the 30-year period. In total, Tillsonburg would require approximately 180 hectares (445 acres) of land for Community Area expansion.
- All of the remaining municipalities will meet the forecast land requirement for commercial and institutional uses through the existing designated land supply and through the provision for commercial and institutional uses to support in the Community Area land need in the Greenfield Areas.

Summary of Employment Area Land Needs Assessment

Employment areas are a vital component of a municipality's economic base. These areas form the backbone of the local economy by providing a stable and designated location for a wide range of businesses. They are crucial for generating jobs and economic opportunities for the County. Over the next 30 years, the County's Employment Areas in the Large Urban Centres and Serviced Villages are expected to accommodate robust growth, representing approximately 39% of the County's employment growth. Key findings regarding the Employment Area land needs assessment are as follows:

- Five of the eight municipalities will require additional designated Employment Area lands over the 20-, 25-, and 30-year periods. The majority of the additional Employment Area land needs are concentrated in the City of Woodstock and the Town of Tillsonburg. No additional Employment Area land is required in the Town of Ingersoll and the Township of Zorra. The Township of Blanford-Blenheim has a small shortfall of 2 hectares over the 30-year period; the County and Township should review these land needs at the next O.P.R.
- Overall, the County is anticipated to require an additional 129 gross developable hectares of designated Employment Areas land over the 20-year period. Over the 30-year period, this is expected to increase to 353 hectares.
- Figures ES-6 through ES-8 provide a summary of the land needs by Area Municipality, which summarizes both Community Area and Employment Area

land needs. As summarized, over the 20-year period, the County will require an additional 529 gross developable hectares of land to be brought into settlement areas to accommodate forecasted growth, increasing to 1,185 gross developable hectares (approximately 2,928 acres) over the 30-year period.

Figure ES-6
Oxford County
Total Land Needs Summary, 20-Year Requirements

Municipality	Community Area, Hectares	Community Area - Adjustment for Commercial and Institutional Uses, Hectares	Employment Area, Hectares	Total Land Needs, Hectares
Woodstock	251	251	83	334
Tillsonburg	64	74	30	104
Ingersoll	2	2	0	2
Zorra	0	0	0	0
Norwich	9	9	0	9
East Zorra-Tavistock	53	53	14	67
Blandford-Blenheim	0	0	0	0
South-West Oxford	11	11	1	12
Total	**390**	**400**	**129**	**529**

Source: Watson & Associates Economists Ltd., 2025.

Figure ES-7
Oxford County
Total Land Needs Summary, 25-Year Requirements

Municipality	Community Area, Hectares	Community Area - Adjustment for Commercial/ Institutional Uses, Hectares	Employment Area, Hectares	Total Land Needs, Hectares
Woodstock	353	353	168	521
Tillsonburg	119	129	49	178
Ingersoll	20	20	0	20
Zorra	0	0	0	0
Norwich	26	26	3	29
East Zorra-Tavistock	72	72	17	89
Blandford-Blenheim	0	0	0	0
South-West Oxford	21	21	3	24
Total	**611**	**631**	**240**	**871**

Source: Watson & Associates Economists Ltd., 2025.

Figure ES-8
Oxford County
Total Land Needs Summary, 30-Year Requirements

Municipality	Community Area, Hectares	Community Area - Adjustment for Commercial /Institutional Uses, Hectares	Employment Area, Hectares	Total Land Needs, Hectares
Woodstock	452	452	251	703
Tillsonburg	170	180	68	248
Ingersoll	36	36	0	36
Zorra	0	0	0	0
Norwich	43	43	5	48
East Zorra-Tavistock	91	91	21	112
Blandford-Blenheim	0	0	2	2
South-West Oxford	30	30	6	36
Total	**822**	**832**	**353**	**1,185**

Source: Watson & Associates Economists Ltd., 2025.

In addition to expansion requirements for Employment Areas in the Serviced Villages and Large Urban Centres, Oxford County is forecast to absorb approximately 117 hectares of rural dry-industrial land. The County should continue to monitor the dry industrial needs.

Policy Recommendations

Based on this Growth Analysis and Land Needs Assessment results, planning policy updates are recommended to guide future growth and development across the County to the year 2061. These recommendations are discussed in detail in Chapter 11 of this report and address the following:

<u>Community Area Policy Recommendations</u>

- Update the population, housing and employment forecasts in Oxford County O.P.;
- Revise residential intensification targets for the Large Urban Centres;
- Consider Residential intensification targets for the Serviced Villages;
- Consider undertaking an Urban Structure Study (as described in 10.3 of this report); and

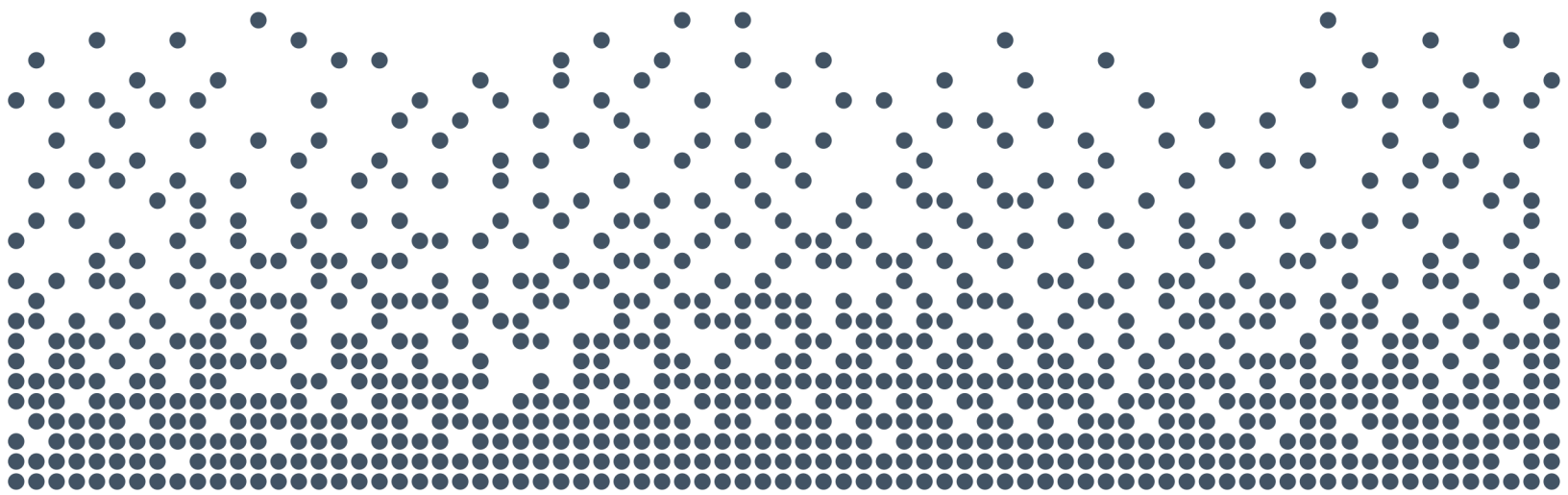
- Undertake Settlement Area Boundary Reviews to address the need for additional Community Area lands over a 20- to 30-year planning horizon.

Employment Area Policy Recommendations

- Plan for future Employment Area land development within the revised Provincial policy framework;
- Establish local evaluation criteria for establishing Employment Area removals;
- Undertake Settlement Boundary Reviews to address the need for additional Employment Area lands over a 20- to 30-year planning horizon; and
- Plan for Employment in the County's Rural Area.

Growth Monitoring and Management

- Enhance tools and policies for monitoring population, housing and employment growth and implementing growth management objectives.



Report

Chapter 1
Introduction

1. Introduction

1.1 Terms of Reference

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- Planning policy recommendations to guide long-term growth, with a focus on planning for, housing intensification, residential and commercial/institutional development in Greenfield Areas (also referred to as Designated Growth Areas in the P.P.S., 2024), Employment Areas and Settlement Area Boundary Expansion (S.A.B.E.). Furthermore, guidance is also provided regarding planning for industrial use within the County's rural areas.

1.2 Background

The Oxford County Official Plan (O.P.) is a visionary document that shapes the way the County and its Area Municipalities grow and develop. The *Planning Act*, sets out what an O.P. can do, including, but not limited to, the following:

- Directing growth and change, mostly related to how land and buildings are used;
- Guiding decisions on land use, development, transportation, physical and community infrastructure, and more; and
- Providing direction for implementing tools such as Zoning By-laws.

The current Oxford County O.P. was adopted on December 13, 1995, and amended as of March 31, 2023, and has positively shaped growth and development across the County over the past three decades. The County is embarking on a review of its existing O.P. to respond to current conditions and trends, and to provide direction with respect to the management of growth and development across the County to the year 2054.

Oxford County is experiencing strong population growth and employment. By 2061, the County's population and employment base is forecast to grow to approximately 223,600 people and 109,700 jobs, respectively. Population growth in the County and its Area Municipalities will be increasingly driven by net migration, which is critical to the sustained economic growth of the County and the surrounding area. Population growth is an essential component of a growing and competitive labour force and business community. Population and employment growth also contributes to the generation of

new jobs for local residents and revenue sources to pay for existing and new municipal services and infrastructure.

While urban growth and economic development can provide many positive impacts, if not managed adequately, development within urban, rural and agricultural areas of the County can lead to increasing challenges, such as, but not limited to, the following:

- Providing housing options for existing and new residents that are attainable and affordable;
- Ensuring transportation options to safely move people and goods throughout the County;
- Responding to negative environmental impacts of urbanization and addressing climate change;
- Loss of productive agricultural lands;
- Replacing aging infrastructure and municipal services; and
- Addressing growing inequality.

To address these challenges, it is important that new development is planned for and accommodated in a manner that supports the policy objectives of the O.P., the County Strategic Plan and Area Municipal Strategic Plans.[1] Furthermore, it is critical that the amount, type, timing, and location of development throughout the County is planned in a manner that is well aligned with housing and employment demand, as well as infrastructure and municipal service needs.

In addressing the pace of future population and employment growth for the County, it is important to recognize that it is difficult for the County and/or Area Municipalities to reduce population growth pressures. This is because population growth and the associated urban growth pressures, more broadly across Canada and specifically in Oxford County, are largely controlled by senior government policies and broader macro-economic forces (i.e., federal immigration policies, provincial and regional economic trends, and regional migration patterns within the Province). Notwithstanding these broader challenges, Oxford County and its Area Municipalities have considerable control to positively influence their competitive position. In planning for its future, the County has numerous opportunities on which to build, including, but not limited to a growing skilled workforce; vibrant urban and rural communities and downtown areas; a

[1] https://www.oxfordcounty.ca/your-government/corporate-performance/strategic-plan/

growing economy anchored by a large and diverse industrial and agricultural employment base; and a high quality of life.

Ultimately, a key objective for Oxford County will be to accommodate growth and change in a manner that preserves the County's livability while embracing development patterns that are sustainable from a triple-bottom-line perspective (i.e. environmental, financial, and socio-economic). With a clear strategy for growth management, Oxford County can proactively plan for and accommodate urban and rural development in an efficient and sustainable manner.

Since the completion of the County's previous Growth Analysis Study, prepared in 2020, [1] the following key factors have collectively contributed to the need to review the long-term population, employment, and household forecast for Oxford County:

- The Statistics Canada 2021 population and housing Census results are tracking considerably higher in most areas of Southwestern Ontario, including Oxford County, when compared to 2021 estimates as per current O.P. and 2020 Growth Analysis Study. Stronger population and housing demand has been primarily driven by outward growth pressure from the City of London and the larger urban centres within the Greater Golden Horseshoe (G.G.H.) between 2016 and 2024.
- Historical housing development activity over the past two decades has been relatively strong across most areas of the County since 2015. However, since the onset of the (COVID-19) pandemic in March 2020, housing demand was further accelerated across Southwestern Ontario, led by increased opportunities for remote/hybrid work, combined with growing employment growth opportunities within the London Economic Region and the surrounding commuter-shed. Added to this, the County's relatively price-competitive housing market, relative to larger urban centres particularly within the G.G.H., has increased this area's attractiveness to young adults, families, empty nesters, and seniors. With stronger housing demand across the County and the broader London Economic Region, there has been a considerably greater development interest from the development community across Oxford County.
- As further noted in Chapter 2, changes in provincial legislation have introduced new requirements for conducting growth projections. The Provincial Planning

[1] Oxford County Phase 1 Comprehensive Review Study by Hemson Consulting Inc., March 2020.

Statement, (P.P.S.), 2024 notes that "planning authorities shall base population and employment growth forecasts on Ontario Population Projections published by the Ministry of Finance and may modify projections, as appropriate."[1]

- Recent updates (provided annually) to long-range population growth forecasts have been prepared by the Ministry of Finance (M.O.F.), including population forecasts for Oxford County, which need to be reviewed.
- Updates to Canadian federal immigration targets for permanent and non-permanent residents (N.P.R.) also need to be considered within the context of long-term County population growth potential.
- Evolving regional economic and real-estate market trends across Southern Ontario, including Oxford County and broader regional area require a review to better understand the impacts on urban and rural development pressures across the County.

In accordance with the above, it is necessary to re-examine Oxford County's near-term and longer-term population, housing, and employment growth forecasts; growth allocations; urban land needs assessment; and, growth management policies. This Growth Forecast and Land Need Assessment is to be used to guide the amount, type, timing, and location of long-term population, housing, and employment growth, settlement area urban land needs, phasing of development for the County, and its Area Municipalities, and to provide planning policy recommendations related to long-term growth management and monitoring. It is noted that the analysis provided herein presents the best information currently available. This analysis is not intended to be used to constrain or set a capacity limit on urban development; however, the forecasts will be used as the basis for other growth-related studies and land use designations/ plans, infrastructure and service delivery decisions will be based on the information in this report.

[1] Provincial Planning Statement, 2024, policy 2.1.1, page 6.

Chapter 2
Policy Context

2. Policy Context

2.1 Provincial Policy Context

2.1.1 P.P.S, 2024

On August 20, 2024, the Province released a new P.P.S., which came into effect on October 20, 2024.[1] The P.P.S., 2024 was released in coordination with Bill 185, *Cutting Red Tape to Build More Homes Act.* The following summarizes key highlights of the P.P.S., 2024 that are particularly relevant to this study:

Planning for Growth

- Compared to the P.P.S., 2020, the P.P.S., 2024 provides a more flexible time horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Policy 2.1.3 states, "Planning for infrastructure, public service facilities, strategic growth areas and Employment Areas may extend beyond this time horizon."[2] As such, this suggests that municipalities are to designate land to accommodate growth for at least 20 years, but not more than 30 years, with the opportunity to designate additional land beyond the 30-year time horizon when planning for Employment Areas, strategic growth areas, and infrastructure.[3]
- Policy 2.1.1 of the P.P.S., 2024 notes that "planning authorities shall base population and employment growth forecasts on Ontario Population Projections published by the M.O.F. and may modify, as appropriate." It is important to note that the M.O.F. population forecasts are provided at the Census Division (C.D.) level only, which typically represents upper-tier municipalities, including separated municipalities and large urban single-tier municipalities. The M.O.F. does not provide forecasts at the area-municipal level (i.e. Census Subdivisions). It is noted that Oxford County is a C.D. in accordance with Statistics Canada.

[1] https://ero.ontario.ca/notice/019-8462.
[2] Provincial Planning Statement, 2024, policy 2.1.3, p. 6.
[3] Ibid.

- The most recent Summer 2025 M.O.F. projections provide growth estimates to the year 2051.[1] As previously mentioned, the P.P.S., 2024 states that land needs can be calculated up to 30 years, with a longer time period permitted for Employment Areas. This may require municipalities, in certain cases, to prepare growth forecasts that extend beyond the M.O.F. horizon of 2051. It is further noted that the M.O.F. forecasts are not meant to replace long-term forecasting by municipalities, but rather to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations, a practice that Watson currently carries out.
- Long-range demographic and economic growth forecasts as well as land needs assessments remain a fundamental background component to the O.P.R. process (refer to section 2.1.3, herein, regarding the most recent direction regarding Provincial guidance on growth forecasting and land needs assessments).

Planning for Housing

- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated and available for residential development. Planning authorities are also required to maintain at all times, where new development is to occur, lands with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans.
- The P.P.S., 2024 requires municipalities to establish and maintain minimum targets for intensification and redevelopment within built-up areas (B.U.A.), based on local conditions.[2]

Settlement Area Boundary Expansions

- According to the P.P.S., 2024, a Settlement Area Boundary Expansion (S.A.B.E.) is allowed at any time and without the requirement of a Comprehensive Review

[1] The Oxford County Growth Analysis and Land Needs Assessment technical work was undertaken under the 2024 M.O.F. projections. The 2025 M.O.F. projections for the County were released in August 2025 after the work was completed.
[2] Provincial Planning Statement, 2024, policy 2.3.1.4, p. 8.

(C.R.), which is a study that evaluates growth management and land needs and was formerly referred to as a Municipal Comprehensive Review (M.C.R.), provided that the S.A.B.E. meets the criteria established in policy 2.3.2.1. The criteria include establishing the need to designate and plan for additional land to meet an appropriate range and mix of land uses, supported by infrastructure and public facilities, while limiting the impact on agricultural areas. Overall, the policies allow for a more simplified and flexible approach for municipalities to undertake an S.A.B.E.[1]

Planning for Employment

- Unchanged from the P.P.S., 2020, major office and major institutional development should be directed to Major Transit Station Areas (M.T.S.A.s) or other strategic growth areas where frequent transit service is available, according to the P.P.S., 2024.[2]
- The P.P.S., 2024 includes an updated definition of Employment Area based on the amendment of the *Planning Act* on June 8, 2023. The *Planning Act* was amended under subsection 1 (1) to include a new, more narrowly scoped definition of "area of employment." This definition of Employment Area has been revised to include only industrial-type employment as a primary use. The amendment to the *Planning Act* received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the *Planning Act* came into effect on October 20, 2024, in concert with the P.P.S., 2024.
- According to the P.P.S., 2024, municipalities are to assess and update Employment Areas identified in O.P.s to ensure that this designation is appropriate to the planned function of Employment Areas.[3]
- The P.P.S, 2024 requires that municipalities designate, protect, and plan for all Employment Areas in Settlement Areas by:
    - planning for the long-term needs of Employment Area uses;
    - prohibiting residential uses, commercial uses, public service facilities, other institutional uses, and retail and office uses not associated with the primary employment use; and

[1] Provincial Planning Statement, 2024, policy 2.3.2, p. 9.
[2] Ibid., policy 2.8.1.4, p. 13.
[3] Ibid., policy 2.8.2.4, p. 14.

    - providing an appropriate transition to adjacent non-Employment Areas to ensure land use compatibility and economic viability.[1]
- Under the P.P.S., 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Previously, under the P.P.S., 2020 and the Growth Plan, municipalities were required to review changes to designated Employment Areas during a M.C.R. or C.R. Under the P.P.S., 2024, municipalities are required to demonstrate that there is an identified need for the removal and that the land is not required for Employment Area uses over the long term. Furthermore, municipalities need to demonstrate that the proposed change from Employment Area to a non-Employment Area use does not undermine the overall viability of the Employment Area.[2]
- The P.P.S., 2024 requires that all development within 300 metres of Employment Areas shall avoid, or mitigate, potential impacts on the "long-term economic viability" of employment uses.[3] This means that when planning for Employment Areas or other uses in proximity to Employment Areas, municipalities must ensure there is an appropriate transition between Employment Areas and sensitive uses, like residential uses where necessary. This acknowledges that the delineation of the Employment Area does not necessarily protect uses on the edge of the Employment Area which may require separation from sensitive uses.
- While the P.P.S., 2024 requires an appropriate separation between Employment Area uses and sensitive uses, it also provides the opportunity for manufacturing, small-scale warehousing, and other industrial uses to be accommodated outside of Employment Areas where there are no adverse effects to being located near a sensitive use. It notes that, if there is an opportunity, these uses should be encouraged in Strategic Growth Areas (S.G.A.s) and other mixed-use areas where frequent transit service is available.[4]

Planning for Growth in Rural Areas

- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 indicates that rural settlement areas shall be the focus of growth and development and their vitality

[1] Provincial Planning Statement, 2024, policy 2.8.2.3, p. 14.
[2] Ibid., policy 2.8.2.5, p. 15.
[3] Ibid., policy 2.8.1.3, p. 13.
[4] Ibid., policy 2.8.1.2, p. 13.

and regeneration shall be promoted.[1] Furthermore, when directing development in rural settlement areas, municipalities are to consider locally appropriate rural characteristics, the scale of the development, and the provision of appropriate service levels.[2]

- In prime agricultural areas, permitted uses and activities include agricultural uses, agriculture-related uses, and on-farm diversified uses based on provincial guidance, according to the P.P.S., 2024.[3] Compared to the P.P.S., 2020, this policy has been modified in the P.P.S., 2024 to include provincial guidance.

2.1.2 Provincial Methodology Guidance Document

On August 11, 2025, the province released a proposed Provincial Projection Methodology Guidance (P.M.G.) document to support the implementation of the P.P.S., 2024 with regard to carrying out long-range forecasts and land need assessments. The province is currently seeking comments on the P.M.G. document with the comment period ending October 11, 2025. Once finalized, this P.M.G. document would replace the existing P.M.G. released in 1995.

Before the P.P.S., 2024 took effect, a separate Land Needs Assessment Methodology for the Greater Golden Horseshoe (G.G.H.) was used to implement the "A Place to Grow: Growth Plan for the Greater Golden Horseshoe." Although this methodology was specifically designed for the G.G.H., its core principles and approaches were widely considered best practices and were often used by municipalities outside the G.G.H. for their land needs assessments. The proposed P.M.G. document includes elements that are very similar to those of the former Land Needs Assessment Methodology for the G.G.H.

According to the Province, the P.M.G. is meant to support policy implementation but cannot add to or detract from the policies of P.P.S., 2024. In addition, the proposed guidance is not intended to address the location of new settlement areas, the location of expansions to settlement areas, the location of employment areas, or the suitability of

[1] Provincial Planning Statement, 2024, policy 2.5.2, p. 11.
[2] Ibid., policy 2.5.3, p. 11.
[3] Ibid., policy 4.3.2, p. 23.

whether a particular area of land should be included or removed from an Employment Area. These matters are to be addressed through other relevant policies.[1]

The P.M.G. document includes the following components:

- Establishing Municipal Population Projections
- Developing Housing Needs Forecasts
- Developing Employment Forecasts
- Land Needs Assessment
- Implementation

Upon reviewing the proposed P.M.G. document, Watson has determined that the approach used for this study is consistent with its requirements. Our key observations on the proposed P.M.G. document as it relates to this study are provided in Appendix A.

2.2 Local Policy Context

2.2.1 Oxford County Official Plan

The County O.P. was adopted on December 13, 1995, with the last significant policy update and amendment in March 31, 2023. As discussed herein, the County is in the process of updating its O.P. in accordance with the current provincial policy framework. The current O.P. identifies a vision for the County and key planning goals and principles, including the direction of growth and future development, natural heritage, economic and industrial development, housing and intensification, cultural heritage, public open spaces, transportation and infrastructure, accessibility, and community well-being. Chapter 4 of the O.P. establishes a framework to direct and manage growth in the County, based on Council adopted population, housing, and employment forecasts for the planning period. The last updates to the planning growth forecasts were adopted by County Council in 2020, for a forecast period that extended to 2046. Since that time, those forecasts have been used as the basis for informing several growth-related planning initiatives in the County (e.g. settlement area expansions, secondary plans, area studies, master plans, etc.). More recently, however, the forecasts adopted by County Council as part of the 2024 County Development Charges Background Study

[1] ERO Posting Notice: https://ero.ontario.ca/notice/025-0844/

have also been used as the most up-to-date Council-approved forecasts for informing planning for growth-related municipal infrastructure.

It is important to note that the municipalities within the County do not have their own separate O.P.s, instead the municipalities have sections in the County O.P. pertaining to local planning policies. As such, the County's O.P. represents the local municipal and County planning direction.

2.2.2 Settlement Hierarchy and Community Structure

As part of this Growth Analysis and Land Needs Assessment, the County's O.P. has been reviewed as it relates to the County's land use objectives and policies related to its urban and rural structure. The Oxford County O.P. identifies the following settlement types:

- **Large Urban Centres,** are municipalities in which development is serviced by centralized wastewater and water supply systems. Functionally, these municipalities tend to serve larger areas and are the location of a wide variety of residential forms, industrial, commercial and institutional uses. Large Urban Centres in the County include:
    - City of Woodstock
    - Town of Tillsonburg
    - Town of Ingersoll
- **Serviced Villages** are settlements located within the County's five rural Township and include a broad range of uses and activities serviced by centralized wastewater and water supply systems. The County's eight Serviced Villages function as service centres for the surrounding rural area and include:
    - Township of Blandford Blenheim: Plattsville and Drumbo;
    - Township of Norwich: Village of Norwich;
    - Township of East Zorra-Tavistock: Tavistock and Innerkip;
    - Township of South-West Oxford: Mount Elgin; and
    - Township of Zorra: Thamesford and Embro.
- For this study, the land needs assessment focuses on fully serviced settlement areas, which include the Large Urban Centres and Serviced Villages as these are the areas where the majority of the County's growth is anticipated.
- **Unserviced Rural Settlement Areas and Remaining Rural Areas**, represent the numerous villages and rural clusters throughout the County's five Townships

that rely on individual private sewage disposal systems and either individual wells or existing centralized water supply systems. As part of this study, population, housing, and employment growth potential within the County's unserviced rural settlement areas and remaining rural areas has been assessed at an aggregate level by Area Municipality. Furthermore, a land needs assessment has not been carried out for these areas as they are not intended to be the focus of growth and development other than minor infilling and small-scale development.

2.2.3 Planning for Housing

One of the guiding principles of the O.P. is to ensure that the diverse housing needs of the population are satisfied and provide housing options by tenure to accommodate all lifestyles, life stages and income levels. This includes the provision of a mix and range of ownership and rental housing types. Subsection 2.1.1 of the O.P. emphasizes the County's objective to promote intensification in appropriate locations within settlements, particularly those serviced by centralized wastewater and water supply facilities. A minimum target of 15% of new development within Large Urban Centres shall occur through intensification. The plan further encourages residential intensification, development of additional residential units and development of other innovative housing forms.

2.2.4 Planning for Employment

Employment Areas in the County currently include all lands in the County's O.P. that are designated for industrial uses, which generally include: Industrial and Traditional Industrial designations. The demand for these lands is directly tied to provincial planning direction (P.P.S., 2024), which requires the County to accommodate uses that meet the province's definition of an Employment Area. General employment uses, such as commercial and institutional uses outside of Employment Areas are accommodated on a range of designated lands in the County including: Business Parks, Central Area (including Central Business District and Entrepreneurial District), Neighbourhood Shopping Area, Service Commercial, Regional Commercial Node Development and Community Facility designations in the Large Urban Centres and Village Core, Service Commercial, and Major Institutional designations in the Serviced Villages.

Chapter 3
Overview of Macro-Economic and Regional Trends

3. Overview of Macro-Economic and Regional Trends

This chapter summarizes the global, national, provincial, and regional economic trends that are anticipated to continue to influence the population and employment growth outlook for Oxford County over the next three decades.

3.1 Navigating Increased Uncertainty in a Changing Global Economy

After several years of resilient global economic growth following the 2020 and 2021 lockdowns during the COVID-19 pandemic, the global economy is now facing a mounting number of near-term economic challenges and geo-political tensions. These global economic challenges largely relate to unresolved conflicts associated with the ongoing war between Ukraine and Russia; the Israel /Gaza and Iranian conflict; ongoing global trade disputes; increasing government, corporate and consumer debt; and ongoing concerns related to persistent inflation.

Collectively, these factors have resulted in heightened global economic uncertainty and volatility, which has raised the likelihood of an economic recession in the U.S. and Canada in 2025/2026. In its latest report, the Organization for Economic Co-operation (OECD) is predicting a softening in its global economic forecast for 2025 and 2026. For Canada, gross domestic product (G.D.P.) is forecast to decline from 1.5% in 2024 to 1.0% in 2025 and 1.1% 2026, a notable reduction from 2.0% in the December 2024 Economic Outlook.[1]

In recent years, rising supply-chain vulnerabilities associated with globalization and its perceived negative impacts on national security, trade balances, and prosperity have prompted countries, most particularly the United States (U.S.), to adopt protectionist measures as part of their national economic strategies. For manufacturing-focused regions such as Southern Ontario, goods-producing sectors—especially the automotive industry—are being impacted by global trade disruptions while also navigating a technological shift toward electric vehicle (EV) production. This transition has been evident at facilities such as GM's CAMI Assembly Plant in Ingersoll, which recently ended production of its BrightDrop electric delivery vans due to weaker-than-expected

[1] OECD Economic Outlook, Tackling Uncertainty, Reviving Growth, June 2025.

demand, and Stellantis plants in Windsor and Brampton, where EV production plans have faced delays and other challenges amid tariffs and market uncertainty. These developments underscore the volatility facing Ontario's automotive sector as it adapts to global EV trends and shifting trade dynamics. While not a new trend, globalization and technological advancements continue to shift the economic composition of developed economies from goods production toward a service-based economy.

Following the post-pandemic global economic recovery, persistently high global and national inflation levels have required an aggressive response by central banks, leading to sharp increases in interest rates and quantitative tightening measures.[1] By mid-2024, both the Bank of Canada and the U.S. Federal Reserve began reducing interest rates in response to declining inflation rates and slowing economic growth. The Bank of Canada has now cut its overnight lending rate multiple times since 2024. Similarly, the U.S. Federal Reserve has also implemented interest rate cuts to support economic growth. Canada's inflation rate has also notably decreased from the peak level of 8.1% experienced in June 2022.[2]

While recent trends in inflation and interest rates are more favourable to Canadian residents, businesses, and investors (relative to the previous two years), their effects often lag and vary considerably at the regional level. Furthermore, despite these more favourable conditions regarding inflation and interest rates, wage and earnings growth have generally not kept pace with the rising costs for goods and services over the past several years, with housing and food costs representing key stressors for most Canadian families. It is also important to recognize that ongoing geopolitical conflicts and U.S. protectionist policies (i.e. tariffs) may limit the effectiveness of the Bank of Canada monetary policy in controlling inflationary pressures even under conditions of slowing global and national economic growth.

As of 2025, rising public sector and household debt in Canada remains a key economic concern, largely due to pandemic response measures and continued expansionary fiscal policy, alongside increasing household debt driven by rising living expenses and significant housing price appreciation in Canada's major urban centres. Since peaking in February 2022, the national housing market has shown signs of cooling, with notable declines in both sales and price growth in recent years driven by higher mortgage rates

[1] Quantitative tightening is a process whereby a central bank reduces the supply of money circulating in the economy by selling financial assets, mainly government bonds
[2] Consumer Price Index June 2025, Statistics Canada

relative to pandemic conditions. It is noted that while trends in housing affordability in Canada vary widely by region, housing affordability (both ownership and rental) has been steadily eroded for the past two decades across most Canadian economic regions. As such, recent trends towards lower interest rates are likely to have a limited impact on improving housing affordability, unless lower borrowing fees are met with a sustained decline in average housing prices and rents.

Ongoing structural changes and technological disruptions shaping the global economy, combined with rising geo-political and trade tensions, will require that both senior and local governments become increasingly agile and responsive to evolving industry demands and disruptive economic forces. These revised near-term economic forecasts and ongoing disruptions are anticipated to influence the near-term population and employment growth outlook for Canada, Ontario, and Oxford County. While these immediate concerns highlight potential setbacks to the country's economic recovery, the longer-term outlook for Canada's economy and housing market remains positive. Continued investments in infrastructure and technology, along with a resilient and growing labour market, will be required to drive national economic growth and competitiveness. Strong leadership and coordination across all levels of government will be needed to navigate these complexities in the coming months and years ahead.

3.2 The Changing Nature of Work

In addition to its broader impacts on the economy, COVID-19 has also accelerated changes in work and e-commerce as a result of technological disruptions which were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks, virtual meetings, cloud technology, artificial intelligence, and other remote work collaboration tools. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional, and industrial real-estate space needs. As of 2016, it was estimated that approximately 8.4% of the Oxford County workforce was working from home on a full-time basis. This estimate increased slightly to 9.1% in 2024, excluding hybrid workers, who are captured as residents with a usual place of work. From a municipal planning and urban development perspective, it is important to consider the impact of hybrid workers when assessing non-residential space needs, particularly in the office sector.

In addition to work at home employment, there are workers within Oxford County who have no fixed place of work (N.F.P.O.W.).[1] The percentage of workers within the County who reported as N.F.P.O.W. was approximately 10.0% in 2016 and about 11.3% in 2025.[2] It is anticipated that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will remain relatively high across Oxford County over the long term, driven by continued growth in knowledge-based employment sectors and technological advancement.

3.3 Provincial Economic Outlook within the Broader Canadian and Global Context

3.3.1 Ontario Population Growth Outlook within the Canadian Context

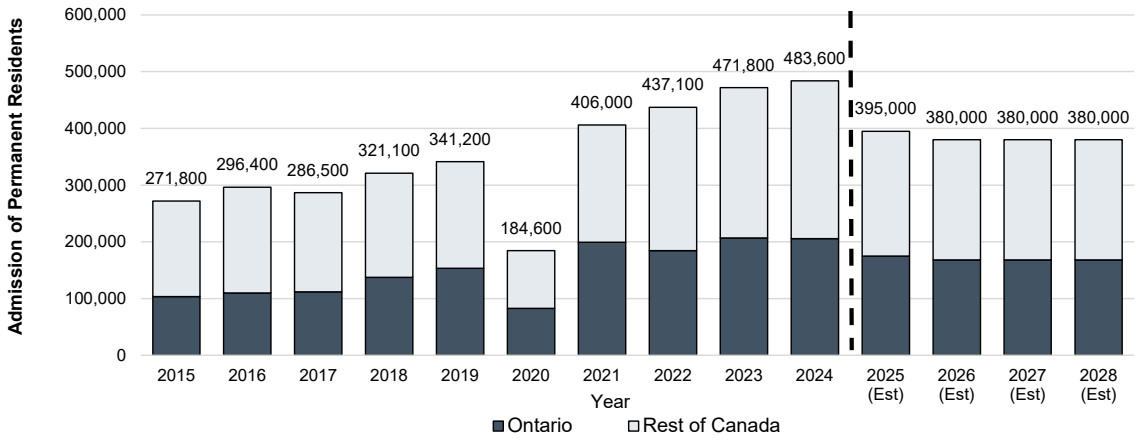
Canada's population has experienced significant growth in recent years. During the recovery period from COVID-19, immigration targets were raised in Canada primarily in response to labour force demands faced by the country. Immigration accounts for almost 100% of Canada's labour force growth and nearly 80% of its population growth. As a result of these increased immigration targets, Canada welcomed 471,800 and 483,600 new permanent residents in 2023 and 2024, respectively. With population growth outpacing G.D.P. growth, the G.D.P. per capita has trended lower and has been recently trending well below pre-pandemic levels.[3] The key challenges to growth in Canadian G.D.P. per capita include declining labour productivity and a rising unemployment rate for recent immigrants, which has increased from 9.5% to 12.6% over the past five years.[4] In response to these challenges, the federal government

[1] Statistics Canada defines N.F.P.O.W. employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
[2] Work at home and N.F.P.O.W. employment derived from 2016 and 2021 Statistics Canada Census data. It is noted that the 2021 Census data may not be reliable due to timing of enumeration coinciding with COVID-19.
[3] Statistics Canada, Economic and Social Reports, *Canada's Gross Domestic Product Per Capita Perspectives on the Return to the Trend* report by Carter McCormack and Weimin Wang, April 24, 2024.
[4] TD Economic Reports, Canadian Employment (July 2024), *Canada's job market softens further in July*, published August 9, 2024.

reduced its immigration targets by 21% in 2024 compared to the previous targets in 2023. Under the latest immigration levels plan for 2026 to 2028, the federal government has lowered the 2023 plans' near-term immigration target of 500,000 people per year to 395,000 in 2025 and 380,000 from 2026 to 2028 (refer to Figure 3-1). The federal government has also announced that it will reduce the percentage of non-permanent residents (N.P.R.) from 7.3% of the national population to 5.0% by the end of 2026.[1],[2],[3] These modifications address the changing needs of the country by easing pressures on housing, infrastructure, and social services. These changes are anticipated to have a further downward impact on future population growth in Canada, including Ontario, over the next few years.[4] Based on 2024 data and looking forward through 2025 and beyond, despite the target cuts, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

[1] Non-permanent residents are defined by Statistics Canada as persons from another country who have been legally granted the right to live in Canada on a temporary resident permit, along with members of their family living with them. These residents include foreign workers, foreign students, the humanitarian population such as refugees, and other temporary residents.
[2] N.P.R. share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents in Canada.
[3] N.P.R. national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.
[4] Government of Canada News Release, October 24, 2024. https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/government-of-canada-reduces-immigration.html

Figure 3-11
Admission of Permanent Residents in Ontario and Canada
Historical (2015 to 2024) and Forecast (2025 to 2028)



Note: Figures have been rounded and may not add precisely.
Source: 2015 to 2024 derived from Immigration, Refugees, and Citizenship Canada (I.R.C.C.) April 22, 2025, data. 2025 target from the Government of Canada's Immigration Levels Plan for 2025 to 2027, and 2026 to 2028 target from the Government of Canada's Immigration Levels Plan for 2026 to 2028, the Ontario target estimated based on the historical share of 44% of the Canadian Permanent Residents Admissions from 2018 to 2024, by Watson & Associates Economists Ltd.

With respect to the Provincial growth outlook, the most recent 2025 M.O.F. population projections show a relative decrease in the growth outlook for Ontario to 20.5 million by 2051. Relative to the 2023 M.O.F. forecast, the M.O.F. projects a reduction of 2.2 million people from 21.7 million to 19.5 million by 2046. This reduction is largely attributed to the federal government announcement to reduce the national percentage of N.P.R. over the coming years and lowered immigration targets (refer the chapter 4, Figure 4-1 for further details). The 2025 M.O.F. population forecast projects a similar long-term population growth rate for the province compared to historical trends experienced over the past 20 years, with an annual growth rate of 1.1% between 2021 and 2051. This translates into an annual population increase of 190,000 people. Comparatively, the level of annual population growth forecast for Ontario under the 2025 M.O.F. forecast is 29% higher than the level of population growth achieved between 2001 and 2021.

3.3.2 Provincial Gross Domestic Product Trends and Near-Term Forecast

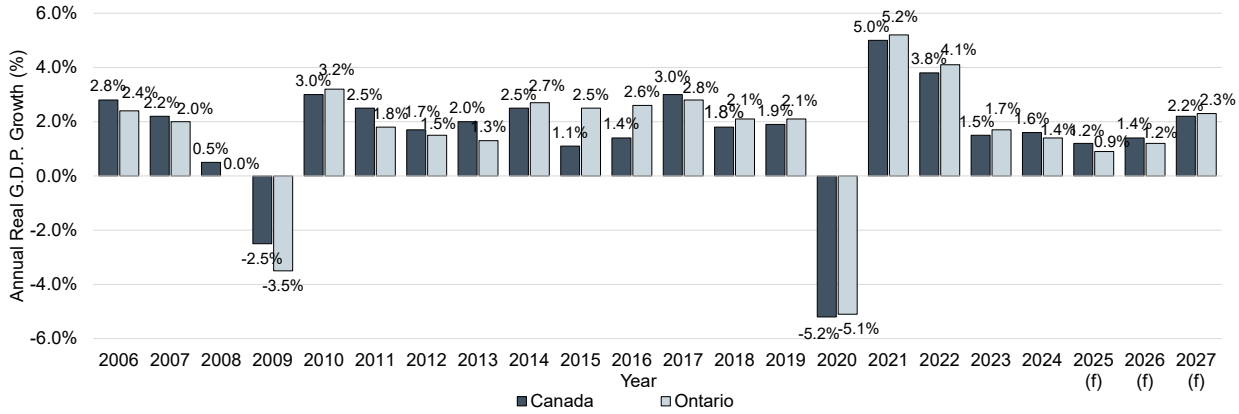
Similar to the broader Canadian economy, the economic base of Ontario, as measured by G.D.P. output, has shifted from goods-producing sectors (i.e. manufacturing and primary resources) to services-producing sectors over the past several decades. This shift has largely been driven by G.D.P. declines in the manufacturing sector, which were accelerated as a result of the 2008/2009 global economic downturn. It is noted, however, that these G.D.P. declines in the manufacturing sector have started to show signs of stabilization over the past few years, both prior to the COVID-19 pandemic and through the more recent economic recovery.

Over the past decade, the Ontario export-based economy experienced a rebound in economic activity following the 2008/2009 economic downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding by 2014, as illustrated in Figure 3-2. This economic rebound was partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar combined with the gradual strengthening of the U.S. and Canadian economy.[1]

The Canadian and Ontario economy deeply contracted by 5.1% in 2020 during the onset of the COVID-19 pandemic, before sharply rebounding by 5.2% in 2021. Throughout 2022, the Ontario economy continued to expand and grew by 3.9%, while the overall Canadian economy grew by 3.8%. BMO Capital Markets has forecast that G.D.P. growth will decline to 0.9% in Ontario and 1.2% overall for Canada in 2025. For 2026, an annualized G.D.P. growth rate of 1.2% is forecast for Ontario and 1.4% for all of Canada, suggesting a downturn in economic growth in the near term, largely driven by global economic uncertainty in response to current U.S. tariffs and protectionist measures, as previously discussed. [2] G.D.P is forecast to rebound in 2027 to a growth rate of 2.3% in Ontario and 2.2% for Canada as a whole.

[1] Valued at approximately $0.71 U.S. as of November 2025.
[2] Provincial Economic Outlook, BMO Capital Markets, November 21, 2025.

Figure 3-2
Province of Ontario and Canada
Annual Real Gross Domestic Product (G.D.P.) Growth, Historical (2006 to 2024), and Forecast (2025 to 2027)



Note: The years 2025 to 2027 are forecasts by BMO Capital Markets Economics.
Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, November 21, 2025, by Watson & Associates Economists Ltd.

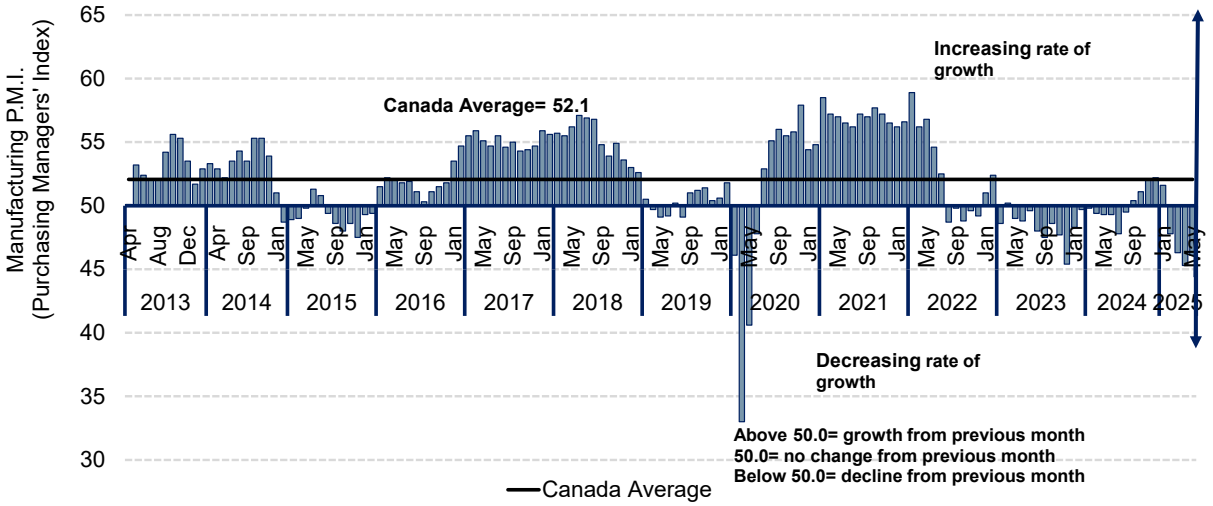
3.3.3 Outlook for National and Provincial Manufacturing Sector

The Purchasing Managers' Index (P.M.I.) is a prevailing economic indicator for economic trends in the manufacturing and services sectors. It is based on the purchasing managers' market condition outlook and serves as a key measure of the direction of the manufacturing sector on a monthly basis. The P.M.I. is a number that ranges between 1 and 100. A P.M.I. value greater than 50 represents an expansion relative to the previous month, while a P.M.I. value less than 50 represents a contraction.

Figure 3-3 summarizes the P.M.I. for Canada between 2013 (October) and 2024 (June). As illustrated in Figure 3-3, the P.M.I. largely indicated moderate to strong expansion between 2013 and 2021, with the exception of 2015, 2019, and 2020 for which the index showed sustained monthly contractions. The P.M.I. shows steep contractions in manufacturing at the beginning of March 2020 due to the negative effects of COVID-19 on the global economy, international trade, and the general demand for goods and services. These conditions worsened into April 2020; however, they showed signs of a strong rebound by July 2020, before moderating by July 2022. For the remainder of

2022 to January 2025 the index showed moderate contractions with brief periods of expansion before entering sustained contractions for the rest of 2025.

Figure 3-3
Canada
Purchasing Managers' Index, April 2013 to May 2025



Note: Above 50.0 indicates growth from the previous month, 50.0 indicates no change from the previous month, and values below 50.0 indicate a decline from the previous month.
Source: HIS Markit Canada, Canada P.M.I. Index, June 2012 to May 2025 summarized by Watson & Associates Economists Ltd.

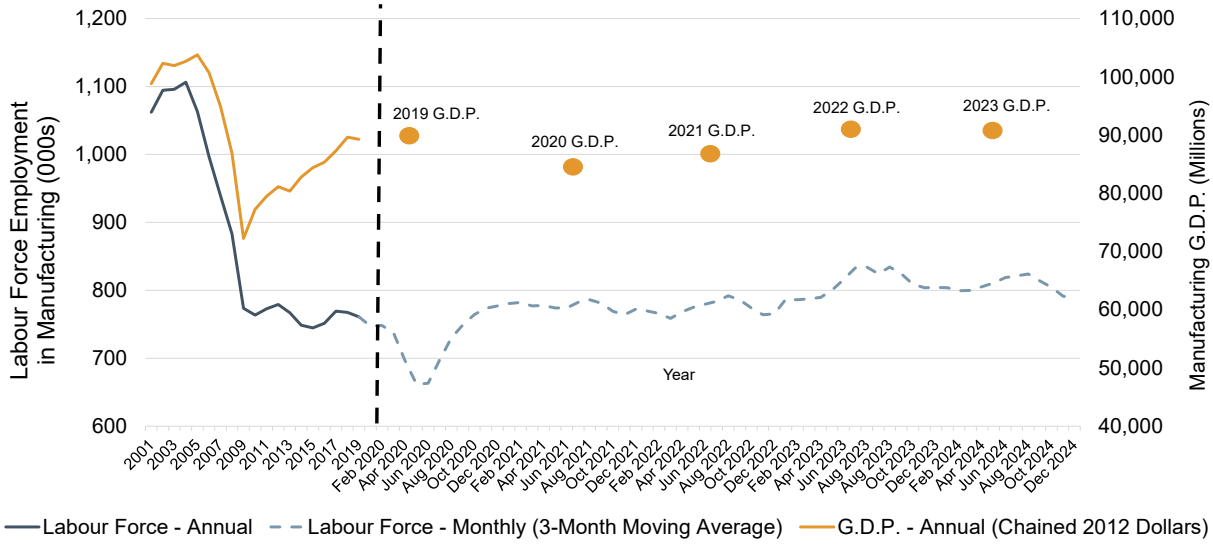
While manufacturing remains vitally important to the provincial and regional economy with respect to jobs and economic output, this sector has not represented an employment growth sector at the Provincial or regional level over the past several decades. Notwithstanding these recent trends, within the London Economic Region the manufacturing sector has experienced a relatively strong recovery over the past decade.

While there will continue to be a manufacturing focus in Ontario, the nature of industrial processes is rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive. As a result of increased technological efficiencies in the manufacturing sector, provincial G.D.P. levels related to the manufacturing sector are anticipated to outpace

labour force growth over the next decade, indicating an increasing G.D.P. output per employee.

As summarized in Figure 3-4, from 2004 to 2009, the labour force and G.D.P. of Ontario's manufacturing sector decreased significantly. Between 2009 and 2019, however, provincial labour force levels stabilized in this sector, while G.D.P. output steadily increased. Since stabilizing in 2010, labour force levels in the manufacturing sector have remained relatively steady except for the mid-2020 decline and sharp recovery following the onset of COVID-19.

Figure 3-4
Province of Ontario
Manufacturing Labour Force Trends
2001 to December 2024



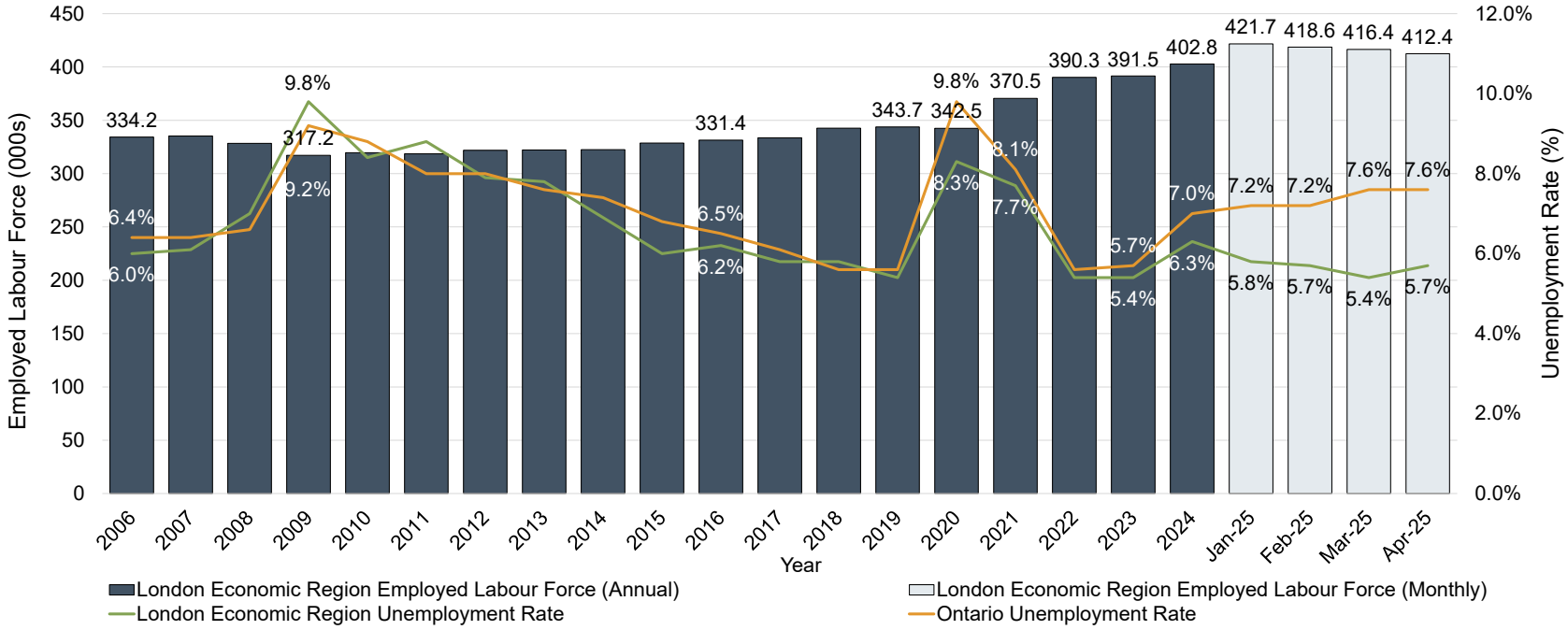
Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, monthly data from Table 14-10-0091-01, and 2021 to 2023 monthly data from Table 14-10-0388-01. Annual gross domestic product (G.D.P.) data from Statistics Canada Table 36-10-0402-01, by Watson & Associates Economists Ltd.

3.3.4 Regional Labour Force Growth Trends

Figure 3-5 summarizes total labour force and unemployment rate trends for the London Economic Region which includes Oxford County. Key observations include the following:

- Since 2011, the London Economic Region has experienced relatively steady labour force growth, coupled with a gradually declining unemployment rate
- Following the pandemic recovery from 2020 to 2021, the labour force in the London Economic Region has steadily rebounded, reaching record highs in the first quarter of 2025 at 421,700 employed individuals.
- Notwithstanding these positive economic trends, the growth rate of the labour force has slowed since early 2025, however, the regional unemployment rate has recently trended downward near 20-year historic lows, indicating tightness in the regional labour market.
- To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by the municipalities within the London Economic Region (working with their public- and private-sector partners) to explore ways to attract and accommodate new skilled and unskilled working residents within a broad range of ownership and rental housing options.
- Looking forward, the medium to longer-term outlook for the regional economy remains positive, however, regional economic conditions are anticipated to remain relatively weaker and more volatile over the short term (i.e. next 12 to 24 months) driven by current geo-political conditions and U.S. protectionist policies.

Figure 3-5
London Economic Region
Labour Force Trends, 2006 to 2025



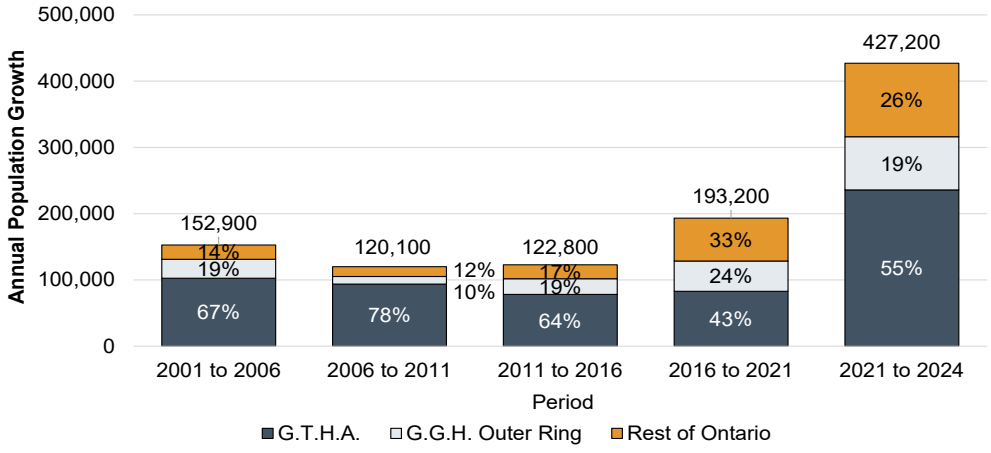
Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
Source: London Economic Region employed labour force and unemployment rate from Statistics Canada Table 14-10-0393-01, Table 14-10-0462-01. Province of Ontario unemployment rate from Statistics Canada Table 14-10-0323-01. Derived by Watson & Associates Economists Ltd.

3.3.5 Provincial Population Growth Trends

Figure 3-6 illustrates the population growth in the Province by sub-regional area. Key observations include the following:

- The share of population growth outside the Greater Toronto and Hamilton Area (G.T.H.A.) steadily increased over the past three Census periods from 2006 to 2021. Most notably, during the most recent Census period (i.e. 2016 to 2021), the share of total provincial population growth for all areas outside the G.T.H.A. increased to 57%.
- In contrast, the share of provincial population growth in the G.T.H.A. has declined in recent years, except for the 2021 to 2024 period, falling from 78% between 2006 and 2011, to 64% from 2011 to 2016, and then to 43% between 2016 and 2021.
- These historical trends in provincial population growth suggests that while the G.T.H.A. will continue to experience a large share of provincial population growth, this population share is anticipated to continue to shift outward into the G.G.H. Outer Ring and the remaining sub-areas of Southern Ontario.

Figure 3-6
Province of Ontario by Regional Area
Population Growth, 2001 to 2024



Notes: Population includes net Census undercount. G.T.H.A. means Greater Toronto and Hamilton Area; G.G.H. means Greater Golden Horseshoe.
Source: Statistics Canada Table 17-10-0152-01, summarized by Watson & Associates Economists Ltd.

3.3.6 Long-Term Growth Outlook for Oxford County

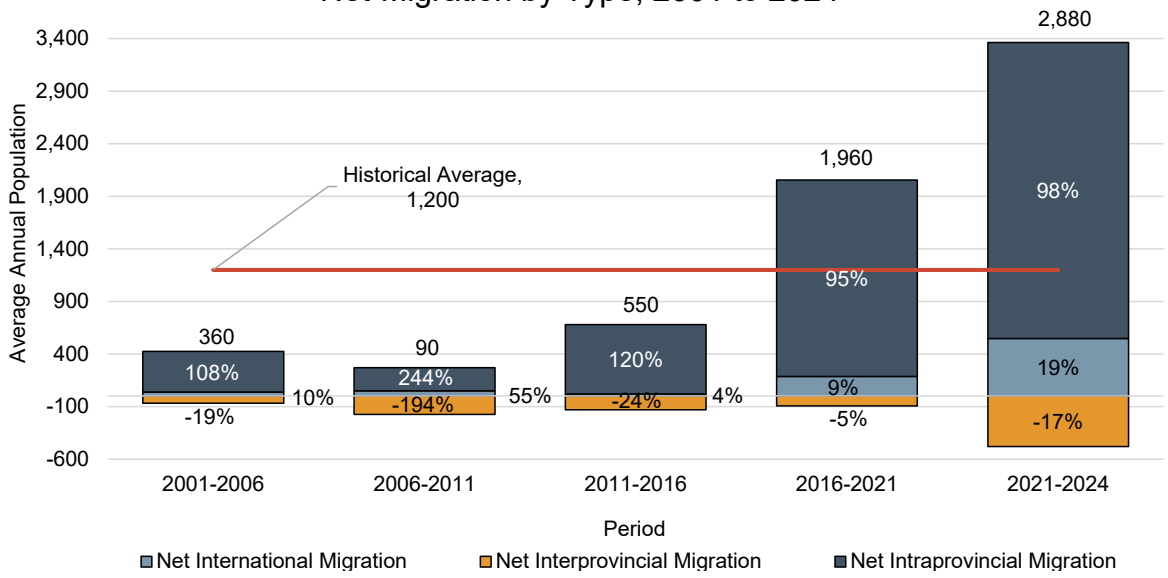
There are two main components of population growth, natural increase (births less deaths) and net migration, which is further broken down into three broad categories including:

- **International Net Migration –** represents international immigration less emigrants, plus net N.P.R.s. Over the last decade, this component of net migration represented an increasing source of net migration for Oxford County;
- **Interprovincial Net Migration –** comprises in-migration less out-migration from other Canadian provinces/territories. Historically, the County has experienced an outflow of net migration within this migration category; and
- **Intraprovincial Net Migration –** includes in-migration less out-migration from elsewhere within the Province of Ontario. This has been a significant source of net migration for Oxford County historically.

Figure 3-7 summarizes net migration by category within Oxford County over the past 20+ years. Historically, between 2001 and 2024, population growth has been largely driven by intraprovincial migration. Over the past eight years, however, the share of net-migration to Oxford County from this net migration category has steadily declined with the rise of international migration. International net migration levels increased steadily during the 2016 to 2021 period, followed by a stronger increase between 2021 and 2024. The amount of intraprovincial net migration to Oxford County has also sharply increased in absolute terms over the past eight years, largely from the G.T.H.A., and the G.G.H. Outer Ring, accounting for 22% and 37%, respectively. [1] The London-Middlesex Area also notably comprised 11% of intraprovincial migration to Oxford County. Looking forward, both international and intraprovincial net migration levels are forecast to remain strong for Oxford County.

[1] Derived from custom order Statistics Canada Migration Flow data by Census Division.

Figure 3-7
Oxford Census Division
Net-Migration by Type, 2001 to 2024



Note: Population figures include net Census undercount. Figures have been rounded and may not add up precisely.
Source: Statistics Canada Table 17-10-0153-01, summarized by Watson & Associates Economists Ltd.

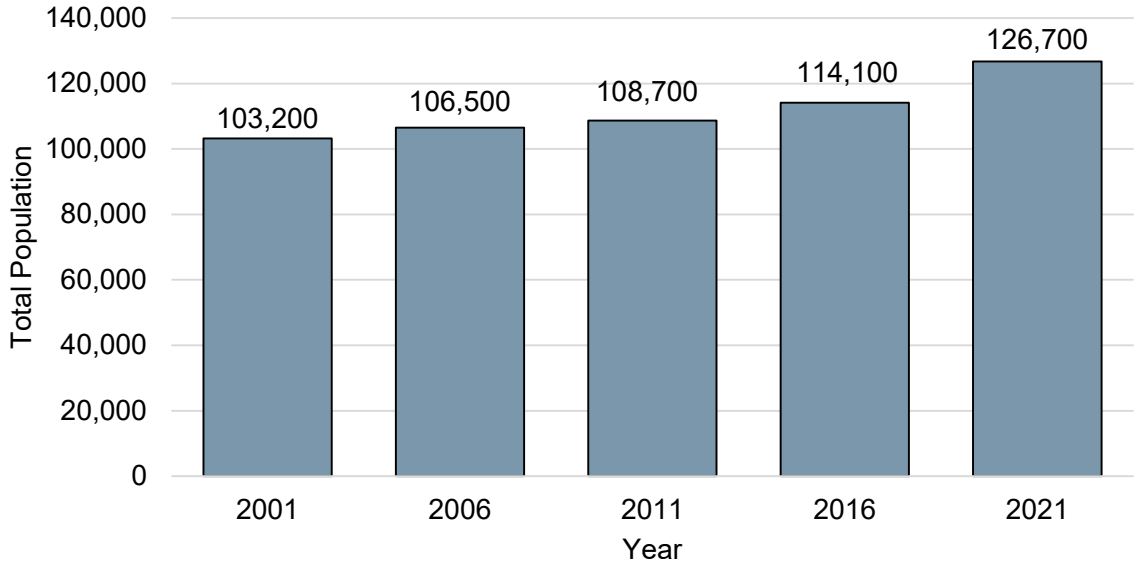
3.4 Demographic, Housing and Employment Trends in Oxford County

3.4.1 Historical Population Growth Trends

Over the past two decades, the population of Oxford County has been steadily increasing. Figure 3-8 summarizes historical population trends for Oxford County over a 20-year period from 2001 to 2021 period. During this period, the County's population increased from 103,200 in 2001 to 126,700 in 2021, an increase of approximately 23,500 people, or an annual growth rate of 1.0%. Comparatively, the population base for the Province of Ontario grew at an annual rate of 1.1% during the same period. Over the most recent 2016 to 2021 Census period, the County's population increased at an annual rate of approximately 2.1%, considerably higher than the provincial average of 1.4%. Post 2021, the County's population growth rate has accelerated further in comparison to the most recent Census period, however, population growth rates are now beginning to moderate with the impacts of relatively higher mortgage rates and slowing regional economic growth. Chapter 4 provides a detailed discussion regarding

the long-term population, housing and employment growth outlook for Oxford County to the year 2061.

Figure 3-8
Oxford County
Historical Total Population, 2001 to 2021



Note: Population includes net Census undercount.
Source: Data derived from Statistics Canada Table 17-10-0152-01 by Watson & Associates Economists Ltd.

Figure 3-9 summarizes historical trends in population structure by major age group over the 2006 to 2021 period for Oxford County. Similar to the Province as a whole, the population across Oxford County is getting older on average (i.e. increasing median age of the population) largely due to the aging of the Baby Boomers living within this area. [1] The first wave of this demographic group will turn 80 years of age in 2026. Within Oxford County, the share of the population in the 55+ age cohort has steadily increased from 26% in 2006 to 33% in 2021. For additional information about historical population trends, please see Appendix C.

In contrast to the 55+ age cohort, the population share of the 0 to 19 age group declined from 26% in 2006 to 23% in 2021. Similarly, the share of the 35 to 54 age group steadily declined from 30% in 2006 to 25% in 2021. Lastly, the population share of the young

[1] Baby Boomers are generally defined as people born between 1946 and 1964.

adult population age group (20 to 34 years of age) experienced a slight increase from 18% in 2006 to 19% in 2021.

Historical and future population trends by age within Oxford County are important to consider, as these trends have a direct impact on housing needs by structure type (i.e. grade-related housing forms vs. high-density housing types), tenure (i.e. ownership vs. rental), and municipal service needs. This is discussed in further detail in Chapter 4.

Figure 3-9
Oxford County
Historical Permanent Population by Major Age Group, 2006 to 2021

Note: Figure has been rounded and includes net Census undercount
Source: Data derived from Statistics Canada Table 17-10-0152-01 by Watson & Associates Economists Ltd.

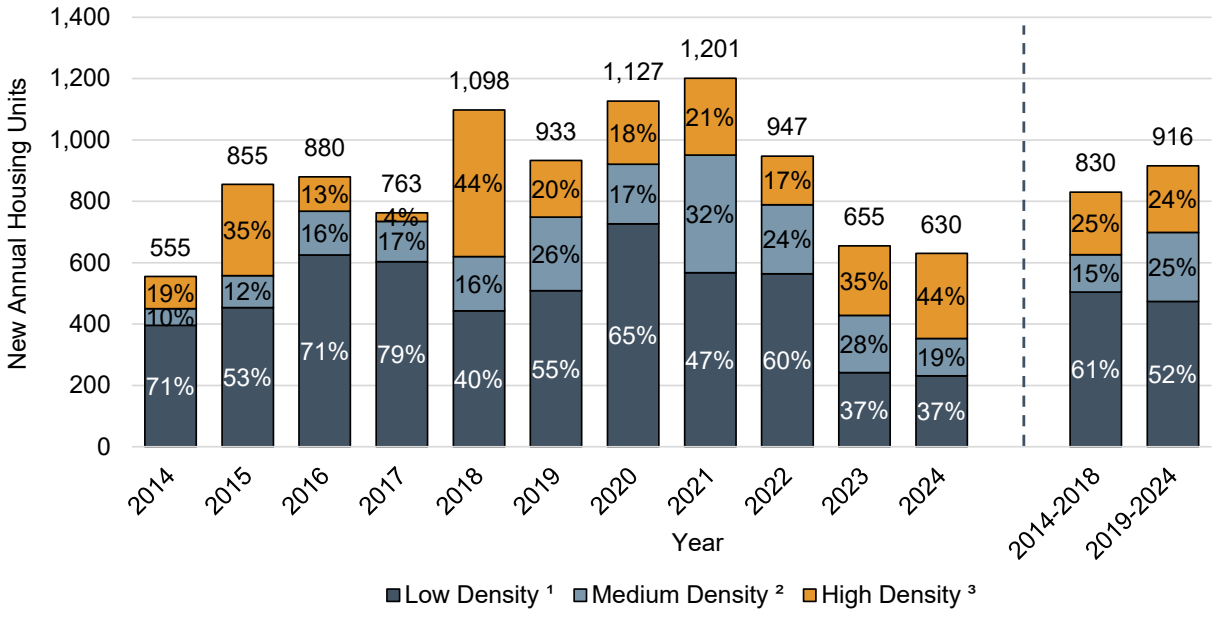
3.4.2 Historical Housing Building Permit Activity Trends

Figure 3-10 summarizes total residential building permits (new units only) by structure type between 2014 and 2023 in Oxford County. Key findings are as follows:

- Over the 2014 to 2018 period, Oxford County averaged 830 residential building permits per year. This annual average increased to 970 permits per year between 2019 to 2023;
- Since the COVID-19 peak in 2020 and 2021, annual residential permit activity for new units has steadily declined;

- Historically, building permits have been concentrated in low-density units with varied high-density activity, however, there has been a sustained increase in medium density types in the County since 2019; and
- Of the total building permits issued for new dwellings from 2014 to 2024 across the County, 77% were issued in the Large Urban Centres, and 23% in the Townships.

Figure 3-10
Oxford County
New Residential Building Permits, 2014 to 2023



[1] Low density includes single and semi-detached houses.
[2] Medium density includes townhouses and apartments in duplexes.
[3] High density includes apartment units.
Source: Building permits derived from Oxford County building permit data, by Watson & Associates Economists Ltd.

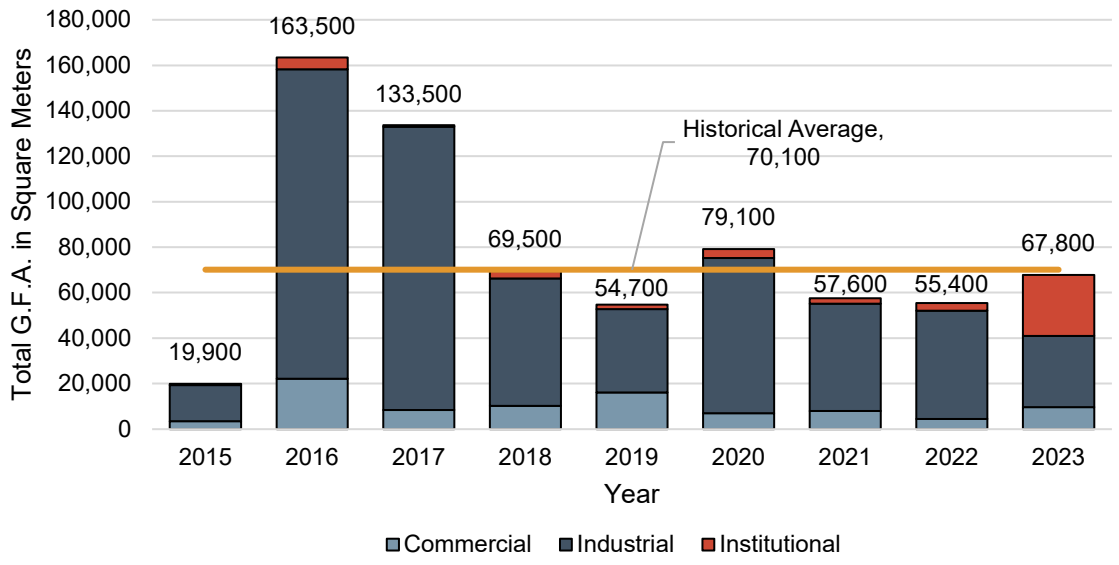
3.4.3 Recent Non-Residential Building Permit Development Trends

Figure 3-11 summarizes non-residential building construction by industrial, commercial and institutional sector (I.C.I.) for Oxford County between 2015 and 2023, expressed in gross floor area (G.F.A.) in square meters (sq.m). Key observations are as follows:

- The County averaged approximately 70,100 sq.m of non-residential G.F.A. over the 2015 to 2023 period;

- New non-residential construction in the County was largely industrial, making up 80% of total new G.F.A. Commercial and institutional construction made up 13% and 7% of new construction, respectively; and
- Of the total non-residential G.F.A. from 2015 to 2023 across the County, 81% were issued in the City and Towns, and 19% in the Townships.

Figure 3-11
Oxford County
New Non-Residential G.F.A., 2015 to 2023



Note: Figures may not sum precisely due to rounding. G.F.A. is net of demolitions.
Source: Data provided by Oxford County, derived by Watson & Associates Economists Ltd.

Chapter 4
Long-term Population, Housing and Employment Forecast

4. Long-term Population, Housing and Employment Forecast

This chapter discusses the long-range population, housing, and employment growth forecast for Oxford County to the year 2061. As part of this Growth Analysis and Land Needs Assessment, a recommended long-term growth forecast has been prepared for Oxford County, based on a detailed assessment of the County's long-term growth outlook within the context of growth trends for the Province of Ontario and Southwestern Ontario over the next several decades.

In accordance with the demographic, economic, and socio-economic trends discussed in Chapter 3, and the key growth assumptions identified in Chapter 4, three long-term population and employment forecasts, including a Low, Medium, and High Growth Scenario, have been prepared for Oxford County to the year 2061. These long-term population and employment scenarios also consider the long-term demographic and economic outlook for the Province and each of the sub-regions within Southwestern Ontario. Additional details regarding the Growth Scenarios are provided in Appendix C.

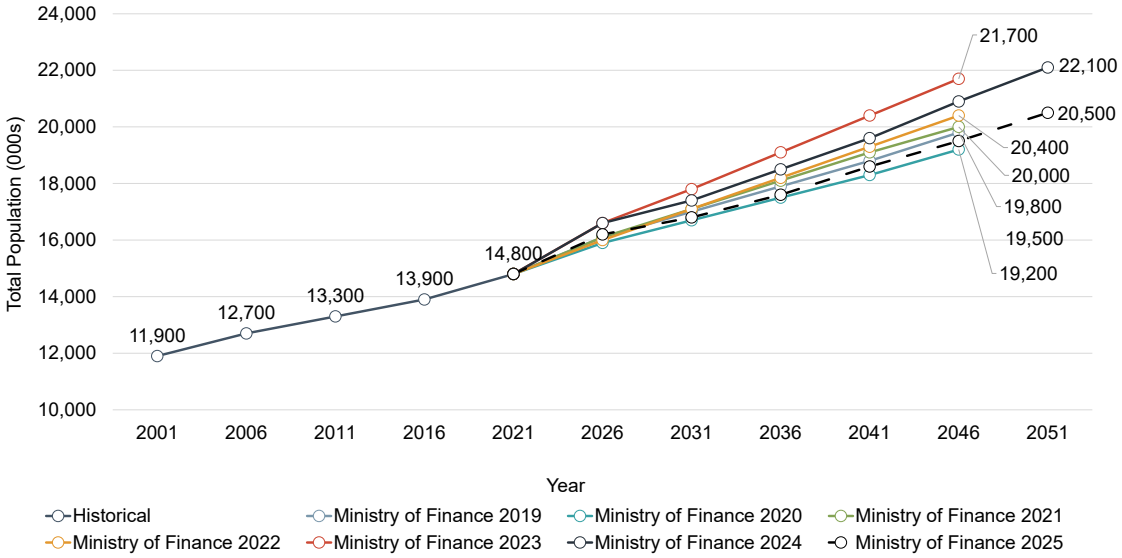
4.1 Population Growth Outlook for the Province of Ontario, 2021 to 2051

Figure 4-1 illustrates how the population for the Province of Ontario has changed over the past 20 years and how the provincial population is forecast to grow to the year 2046 and 2051 in accordance with M.O.F. population projections since 2019. Key observations are as follows:

- Historically, the Province of Ontario grew annually at a rate of approximately 1.1% between 2001 and 2021, reaching a population of 14.8 million in 2021.
- The M.O.F. population projections for Ontario showed a consistent upward trend in the province's annual population growth rate with each new release between 2019 and 2023. The latest 2024 and 2025 projections have steadily reduced the provincial population outlook to 2051, reflecting reduced federal immigration targets and a lower near-term economic outlook, as discussed in Chapter 3.
- The latest 2025 M.O.F. update indicates that Ontario's population is projected to grow at an annual rate of around 1.1% from 2021 to 2051, adding approximately 190,000 people per year and reaching a population of 20.5 million by 2051.

- Comparatively, the level of annual population growth forecast for Ontario under the 2025 M.O.F. forecast is 29% higher than the level of population growth achieved between 2001 and 2021.

Figure 4-1
Province of Ontario
Ministry of Finance Population Projections, 2019 to 2025



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical 2001 to 2021 data from Statistics Canada Table: 17-10-0152-01, and Ministry of Finance projections from Summer 2019, Spring 2020, Spring 2021, Summer 2022, Summer 2023, Fall 2024, and 2025 Interim Update releases derived by Watson & Associates Economists Ltd.

4.2 Southern Ontario's Evolving Demographic and Economic Landscape

Figure 4-2Figure 4-2 and 4-3 summarize the historical and forecast annual population growth rates for each of the sub-regions within Southern Ontario, including: 1) Southwestern Ontario; 2) the G.T.H.A.; 3) the G.G.H. Outer Ring; 4) Eastern Ontario; and 5) the Near North in accordance with the M.O.F. 2024 projections.[1],[2] The population projections provided in Figure 4-2 are generated by the Ontario M.O.F., aggregated at the C.D. level, annually, to reflect the most up-to-date trends and historical data.[3], [4]

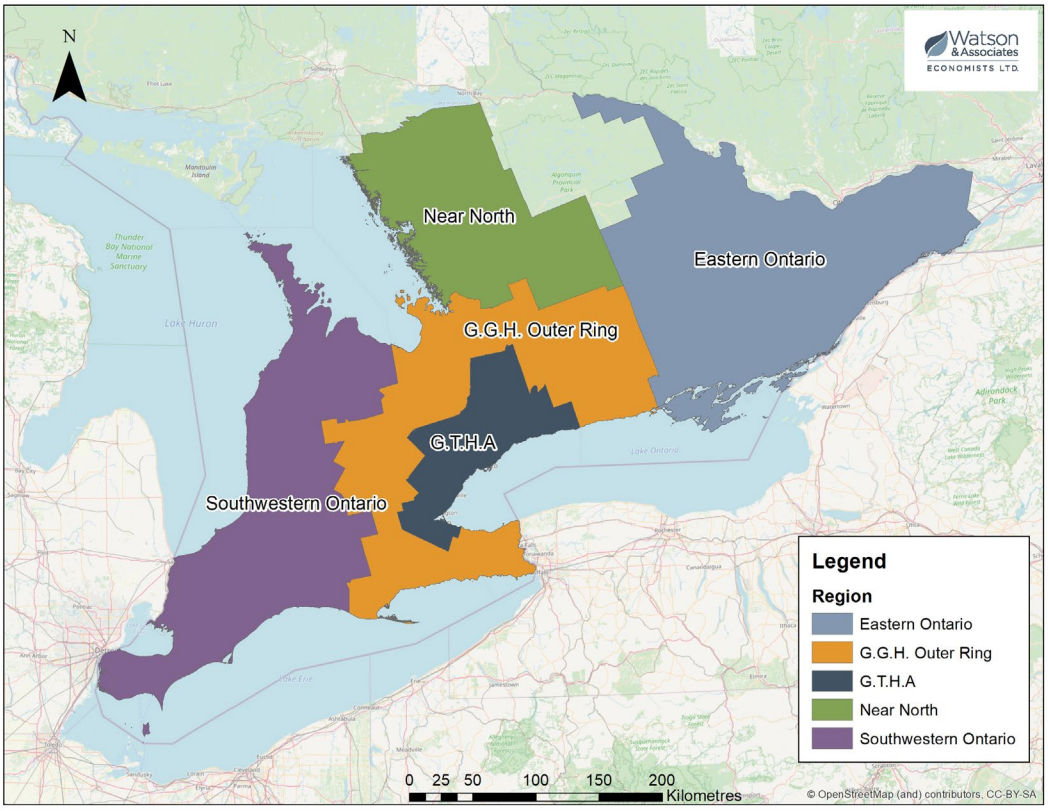
Figure 4-2
Historical Annual Population Growth Rates, 2001 to 2021 vs. Forecast Annual Population Growth Rates by Southern Ontario Sub-Regions, 2021 to 2051

Area	Historical Annual Growth Rate (2001 to 2021)	Forecast Annual Growth Rate (2021 to 2051)
G.G.H. Outer Ring	1.1%	1.5%
G.T.H.A.	1.4%	1.3%
Southwestern Ontario	0.9%	1.3%
Eastern Ontario	1.0%	1.4%
Near North[1]	1.1%	1.2%
Province of Ontario	**1.1%**	**1.3%**

[1] Near North includes the District of Muskoka, Haliburton County, and the District of Parry Sound.
Source: Historical derived from Statistics Canada Census 2001 to 2021. Forecast derived from Ministry of Finance Population Projection for Fall 2024 by Watson & Associates Economists Ltd.

[1] Note that sub-regions 2 and 3 collectively form Central Ontario within Southern Ontario. Near North includes the District of Muskoka, Haliburton County, and the District of Parry Sound.
[2] The Oxford County Growth Analysis and Land Needs Assessment technical work was undertaken under the 2024 M.O.F. projections. The 2025 M.O.F. projections for the County were released after the work was completed.
[3] In accordance with Statistics Canada, Census Divisions consist of upper-tier municipalities (County, District, and Regional municipalities), as well as administratively separated single-tier municipalities and large urban single-tier municipalities.
[4] Ontario Population Projections Update, 2023-2051. Ministry of Finance. Fall 2024.

Figure 4-3
Southern Ontario Geographic Sub-Regions



Within the sub-regions of Southern Ontario, annual population growth rates have historically been much higher in the G.T.H.A. relative to the province as a whole. In contrast, over the next 30 years, this divergence in annual population growth rates between the G.T.H.A. and the remaining Southern Ontario sub-regions is anticipated to continue to narrow, largely driven by continued outward growth pressure from the G.T.H.A. to the surrounding sub-regions of Southern Ontario. These trends have already been observed in the 2021 Statistics Canada Census as well as post-Censal estimates and are anticipated to continue over the long term. The basis for these anticipated demographic changes and the implications for Oxford County are further discussed below.

1) **The population growth outlook for Ontario remains strong, driven by relatively higher federal immigration targets and a positive long-term economic outlook for the Province.**

- Notwithstanding the current macro-economic headwinds and recent reduction in the federal immigration target for Canada, the long-term growth outlook for Ontario remains strong. Forecast annual immigration levels are anticipated to remain higher over the long-term than average levels achieved over the past two decades. Over the past decade, Ontario's strengthening export-based economy has been a key driver of increased immigration to the province. Steady future economic growth is anticipated to attract consistent levels of newcomers to the Province over the long-term.
- Over the past five years, international migration (immigration) levels have increased for each of the Southern Ontario sub-regions outside Central Ontario, except for the Near North sub-region where higher population growth rates have been almost exclusively driven by increased intraprovincial net migration levels, largely coming from the G.T.H.A.

2) **Continued outward growth pressure from the G.G.H. represents a driving factor of population growth to Southern Ontario's other sub-regions.**

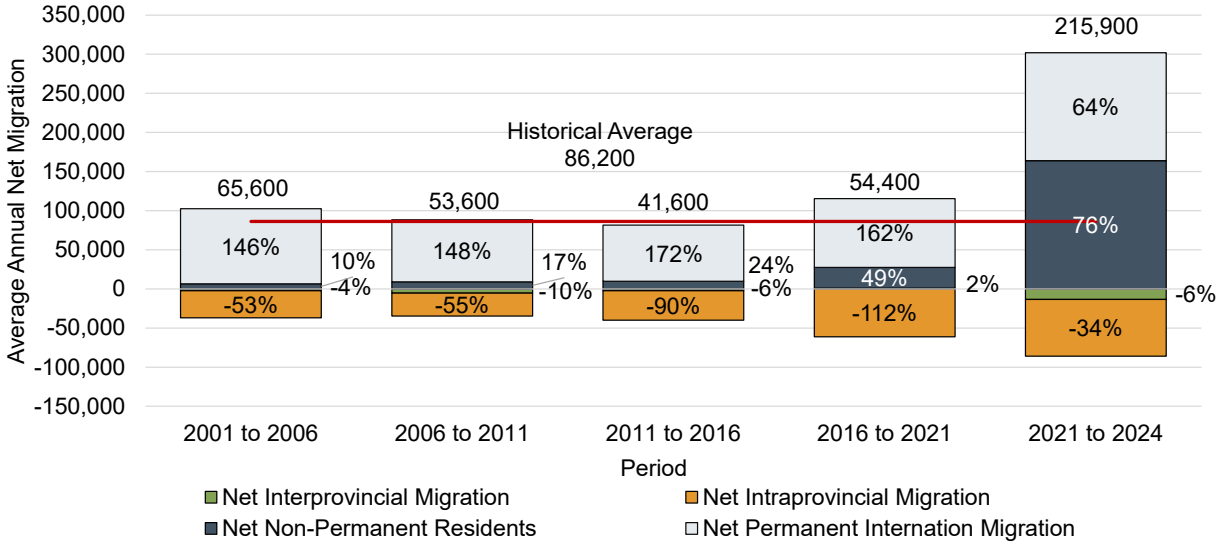
- As summarized in Figure 4-4, net migration to the G.T.H.A. has historically been driven by international migrants. For areas outside the G.T.H.A., however, 57% of net migration was driven by intraprovincial migration between 2016 and 2021, as shown in Figure 4-5. Since 2021, the share of intraprovincial net migration to total net migration outside of the G.T.H.A. has fallen as a result of significantly higher net migration associated with N.P.R., however, absolute levels of intraprovincial net migration outside of G.T.H.A. remain strong. It is also important to recognize that this trend toward increased outward urban growth pressure also exists at the sub-regional level across many of Southern Ontario's other larger urban centres, including the City of Ottawa, the City of London, the Kitchener-Waterloo area, the City of Windsor, and the City of Kingston.

As previously discussed in section 3.3.6, the G.T.H.A. and Outer Ring represented 22% and 39%, respectively, of net intraprovincial net migration reported for Oxford County over the past Census period. For Oxford County, outward growth pressure from the G.G.H. represents the primary driver of permanent population growth over the long

term. Across Oxford County, these trends are anticipated to continue but will moderate relative to recent trends experienced between 2016 and 2024. Key factors that support these continued trends include:

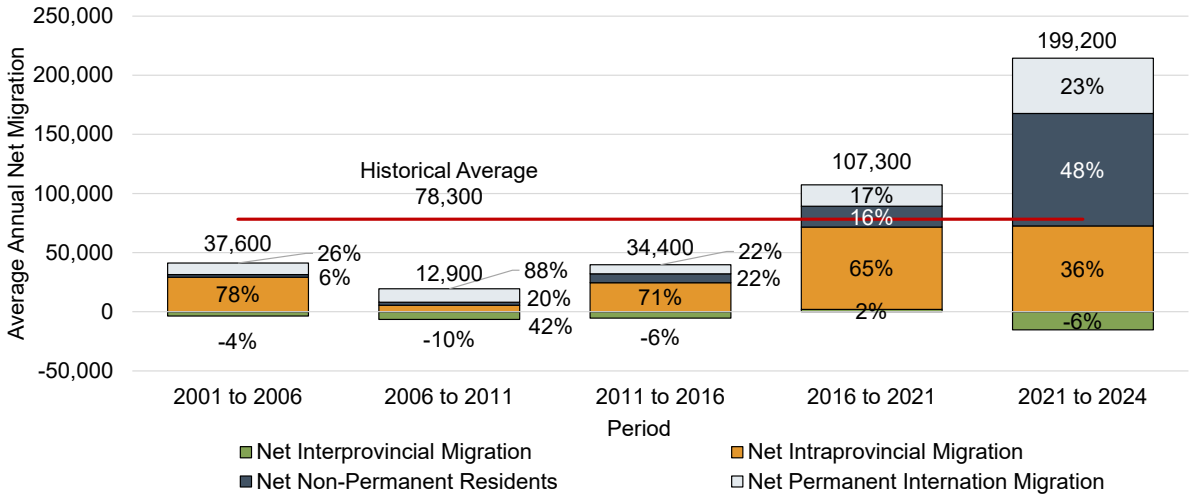
- Relative housing affordability within Oxford County, compared to the G.G.H.;
- Continued growth in the regional economy, including the surrounding municipalities that comprise the Oxford County commuter-shed (i.e. steady labour force growth within both services-producing and goods-producing sectors);
- Changes to the nature of work, led by technological improvements and increased options for remote/hybrid work, were accelerated during the COVID-19 pandemic; and
- Lifestyle preferences as some residents from larger Urban Centres of the G.G.H. continue to exchange "city lifestyles" for a greater balance of urban and rural living.

Figure 4-4
Greater Toronto Hamilton Area
Historical Net Migration by Type, 2001 to 2024



Note: Figures have been rounded and include a net Census undercount.
Source: Derived from Statistics Canada Table 17-10-0153-01 (components of population change by Census Division, 2021 boundaries), by Watson & Associates Economists Ltd.

Figure 4-5
Ontario Less the Greater Toronto and Hamilton Area
Historical Net Migration by Type, 2001 to 2024



Note: Figures have been rounded and include a net Census undercount.
Source: Derived from Statistics Canada Table 17-10-0153-01 (components of population change by Census Division, 2021 boundaries) by Watson & Associates Economists Ltd.

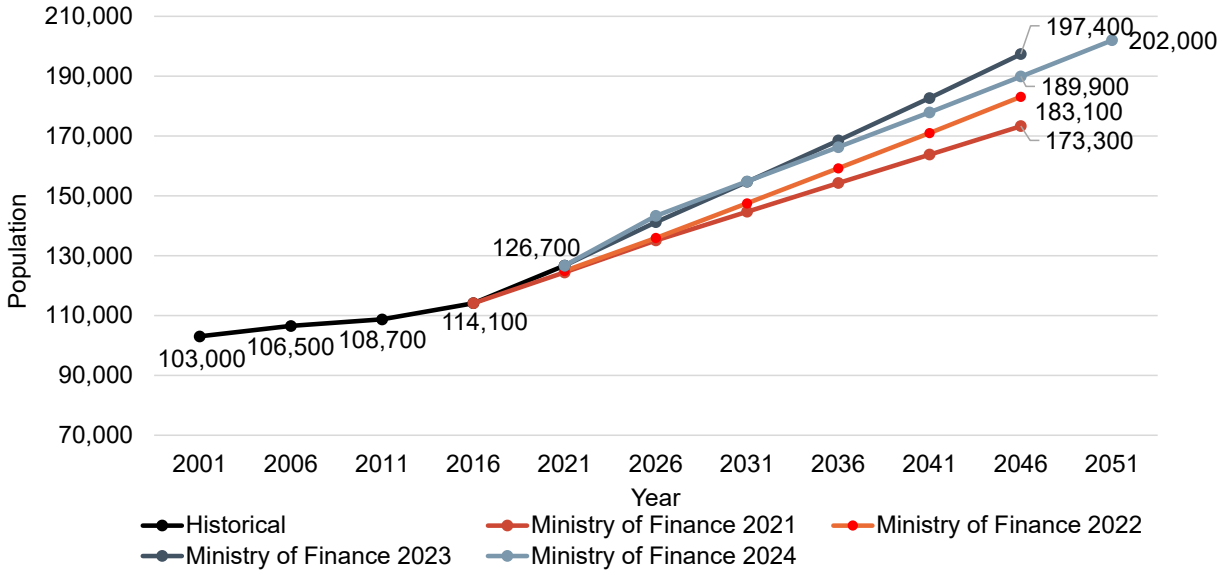
4.3 Ministry of Finance Long-Term Population Growth for Oxford County

Figure 4-6 summarizes the population projections to 2051 for Oxford County, as prepared by the M.O.F. between 2017 and 2024. Over the past five years, Oxford County's annual population growth rate, in accordance with the M.O.F. projections, has increased from 1.1% to 1.6%. By 2051, the Oxford County population is forecast to reach approximately 202,000 people.[1],[2] While the 2024 M.O.F. projections for Oxford County are more ambitious relative to the most recent 2025 M.O.F. population

[1] It is noted that the M.O.F. population forecast for Oxford County does not specifically address the potential for economic trends (i.e. local and regional employment opportunities) and/or other lifestyle factors.
[2] The Oxford County Growth Analysis and Land Needs Assessment technical work was undertaken under the 2024 M.O.F. projections. The 2025 M.O.F. projections for the County were released after the work was completed. The 2025 M.O.F. projects a 2051 population of 198,000 for the County, a minor reduction of 2% from the 2024 M.O.F. projections.

projections for the Province and County, the long-term population growth outlook for Oxford County remains relatively stronger than the historical population growth trends over the past 20 years (refer to section 4.2).

Figure 4-6
Ministry of Finance Population Forecasts for Oxford County,
2001 to 2051



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01, and Ministry of Finance (M.O.F.) Projections from Spring 2021, Summer 2022, Summer 2023, and Fall 2024 releases, adapted by Watson & Associates Economists Ltd.

4.4 Driving Factors Contributing to Long-Term Employment and Population Growth in Oxford County

Section 4.5 presents the recommended long-term population and employment forecast for Oxford County to the year 2061. It is recognized that, over the long term, a range of population and employment growth outcomes can be expected for the County based on varying economic and demographic assumptions for the Province, the regional area and the County. Provided below is an overview of the key assumptions informing the recommended long-range population growth forecast.

4.4.1 Macro-Economic Conditions

As previously discussed in Chapter 3, the COVID-19 pandemic and current geo-political uncertainties have had a significant economic impact on the national and provincial economy since 2020. The recommended population growth forecast assumes that provincial G.D.P. growth will meet future provincial near-term G.D.P. forecasts.

4.4.2 National Immigration Trends

Section 3.4.1 of this report provides a discussion regarding federal immigration targets for Canada and Ontario. The recommended population forecast assumes national and provincial immigration targets will be achieved and that historical provincial net migration shares within Oxford County will remain steady, or modestly increase, relative to historical trends experienced over the past 20 years.

4.4.3 Local and Regional Economic Opportunities

The following key local and regional economic assumptions have been made in developing the Oxford County long-term recommended population and employment growth forecast:

- Employment growth is comprised of two major categories, export-related and community-related employment, as summarized below:
    - Community-related job growth is tied to population growth. These jobs provide services such as retail, entertainment, and hospitality to the community. Under the recommended growth forecast, population growth will generate demand for employment to service the needs of the increased population.
    - Export-related jobs are largely industrial-based and consist of industries such as manufacturing and logistics. Local factors which can influence export-related employment growth within the County include, but are not limited to, price of industrial lands, availability of shovel-ready industrial lands with a broad range of sizes, access to labour force and localized supply-chain opportunities. These local factors are anticipated to influence the share of industrial employment accommodated within Oxford County and within the broader regional area under each long-term growth scenario.

- The regional economy and labour force has strongly rebounded from the impacts of COVID-19 (refer to section 3.3.4 for additional details). Notwithstanding the current slowdown in macro-economic conditions, the regional and local economy is anticipated to steadily expand over the long-term.
- The industrial market has also been steadily recovering since the 2008/2009 economic downturn, and the supply of vacant serviced employment lands is steadily diminishing within the large urban centres of the G.T.H.A. As these more mature areas of the G.T.H.A. gradually buildout, increasing outward growth pressure is being placed on other industrial markets across southern Ontario. Relatively low Province-wide industrial vacancy rates and competitively priced industrial lands are attracting demand to Oxford County for industrial and export-based development.
- Employment growth in the regional area also drives population growth to Oxford County. With respect to the most recent commuting trends, 67% of Oxford's residents work within the County, while 33% work outside the County.[1]
- Given the competitive position of existing and planned Employment Areas in Oxford County (as measured in terms of location/access to major North American employment markets and large population centres, parcel size, price per acre, and competitive development costs, etc.), the County is anticipated to achieve a relatively stronger rate of industrial absorption over the long-term planning horizon, relative to historical trends observed over the past decade.
- The County has an established industrial sector, with a strong auto manufacturing presence which includes the General Motors (GM) CAMI and Toyota auto assembly plants.[2] Looking forward, there are industrial development opportunities related to supply chains to support Ontario's automotive cluster and EV production in the regional area, such as the planned Volkswagen Battery Cell Gigafactory in St. Thomas.
- Oxford County has key local infrastructure supporting growth which includes, but is not limited to the following:
    - Strategic location within Ontario's industrial heartland in southern Ontario, offers proximity to eastern and western U.S. markets;

[1] Based on Statistics Canada 2016 Census commuting flow data.
[2] On October 2025, General Motors announced they are ending the Chevrolet BrightDrop production at the CAMI plant. As of November 2025, the plant is not operating as discussions with General Motors regarding the plant's future continue.

    - Access to infrastructure assets such as Highway 401 and Highway 403 which links major urban centres in Ontario and Quebec to the U.S;
    - Designated employment lands and opportunities for future Employment Area expansion along Highway 401 and 403; and
    - Access to a growing skilled labour force pool within the major urban centres in the G.G.H. (G.T.H.A., City of Guelph, Region of Waterloo) to the north-east, and from the London-Middlesex Area to the west.
- Additionally, the County has a vibrant rural economy. Home to approximately 2,000 farms, agricultural activities are significant to the overall Oxford County economy. Agri-business and food processing provide an opportunity to deepen agricultural activity and increase productivity of the industry by providing value-add products and services. This thriving sector also supports the tourism industry.

Oxford County continues to have a strong appeal to both businesses and residents. This appeal is largely attributed to the County's geographic location which offers strategic industrial land, and opportunities for urban and rural living within proximity to retail, entertainment and other amenities, including public and private schools, hospitals, access to recreational facilities, as well as access to natural/open space area and the County's rural countryside. These attributes offer a high quality of life and make the County an attractive destination for residents of all ages, and small, mid-sized and large businesses.

4.4.4 Demographic Trends

The following key demographic trends have been assumed under recommended employment and population growth forecast for Oxford County:

- Similar to Ontario's population as a whole, Oxford County's population is steadily getting older (i.e. higher average age of population), driven by the aging of the Baby Boomer generation. Within the County, the share of population aged 65+ is forecast to increase from 19% in 2021 to 25% in 2061.
- The County's mortality rate is forecast to increase over the long term due to the aging of the population. Additionally, there is downward pressure on births as the population ages. These factors result in a progressively declining natural increase (i.e. births less deaths) from 2021 to 2061.

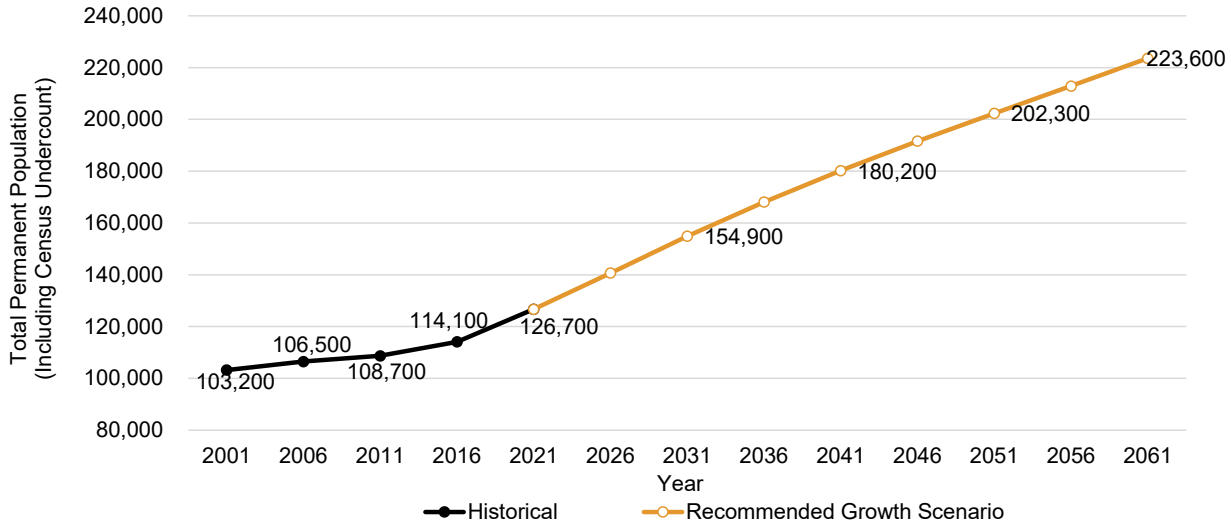
- From 2006 to 2021, Oxford County experienced average net migration of 1,000 people annually. Under the recommended growth forecast, annual net migration is forecast to be considerably higher relative to 2006 to 2021 levels.

4.5 Long-Term Population Growth Forecast for Oxford County, 2021 to 2061

Figure 4-7 illustrates the recommended long-term population growth forecast for Oxford County to the year 2061. Key observations are as follows:

- The Oxford County population grew from 103,200 in 2001 to 126,700 in 2021, representing a steady population growth over the 20-year period.
- Under the Recommended Growth Forecast, the Oxford County population is projected to reach 223,600 by 2061, achieving an average annual growth rate of 1.6% over the next four decades. This forecast is consistent with the Fall 2024 M.O.F. projections for the Oxford County to 2051.

Figure 4-7
Oxford County
Recommended Long-Term Total Population Forecast, 2001 to 2061



Note: Population includes net Census undercount estimated at 4.1% and figures have been rounded.
Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; forecast prepared by Watson & Associates Economists Ltd.

The recommended population growth forecast provided in Figure 4-7 indicates that the long- term population growth outlook for Oxford County will be strong relative to population growth trends the County has experienced over the past two decades and beyond. The recommended growth forecast has been determined to be appropriate for long-range growth forecast and planning purposes based on the following reasons:

1. The recommended growth forecast represents an ambitious, yet plausible rate of future population growth relative to historical trends, considering recent and forecast immigration levels expected for Canada and Ontario over the next several years and longer-term population growth forecasts for the Province. As previously noted, continued outward growth pressure from the G.G.H. will continue to represent the largest driver of population growth for the Oxford County.

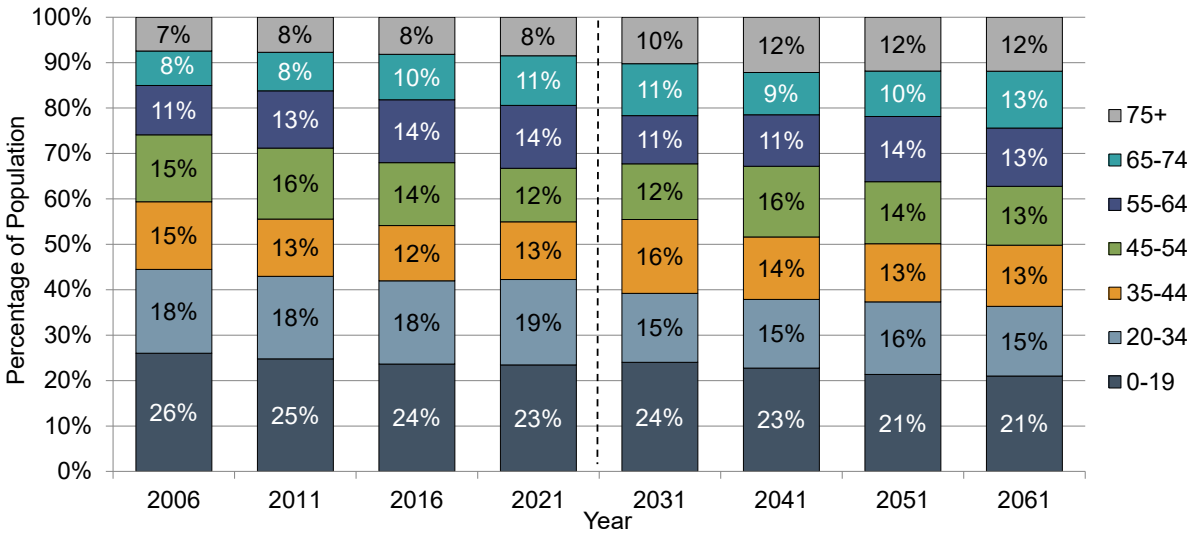
2. Population growth in the Oxford County will continue to be largely driven by net migration (immigration) of working-age adults. Forecast near- and long-term trends in net migration are ambitious, but plausible, for the purposes of long-range planning within the context of federal immigration targets, regional migration patterns, and projected long-term population growth rates across Southern Ontario. The forecast level of annual new housing development required to accommodate the recommended population growth forecast for Oxford County represents an ambitious outlook in housing activity relative to historical trends. Under the P.P.S., 2024, policy framework, the County has the flexibility to plan for a 20-to 30-year horizon with respect to the accommodation of future housing and land needs associated with the recommended long-range growth scenario.

4.5.1 Forecast Population by Age Group

Figure 4-8 summarizes the Oxford County population forecast by major age group over the 2011 to 2061 period. Over this time, the County's population is expected to steadily age. Most notably, the percentage of the population in the 75+ age group is projected to increase from 7% of the total population in 2006 to 12% by 2061. Similarly, the percentage share of population in the 65 to 74 age group is also forecast to steadily increase, rising from 8% in 2006 to 13% in 2061. This forecast population aging trend is anticipated to place downward pressure on the population and labour force growth rate within the County over the long term. The aging of the County’s population is also anticipated to place increasing demand on the need for seniors’ housing, high-density rental and ownership housing as well as other attainable and affordable housing

options. Please refer to Appendix C for additional details on population distribution by age group.

Figure 4-8
Oxford County
Recommended Population by Age Group Forecast, 2006 to 2061



Note: Figures may not add precisely due to rounding. Population figures include a net Census undercount estimated at 4.1%.
Source: Historical 2006 to 2021 data derived from Statistics Canada Table 17-10-0152-01; 2021 to 2061 forecast prepared by Watson & Associates Economists Ltd.

4.5.2 Trends in Housing Occupancy

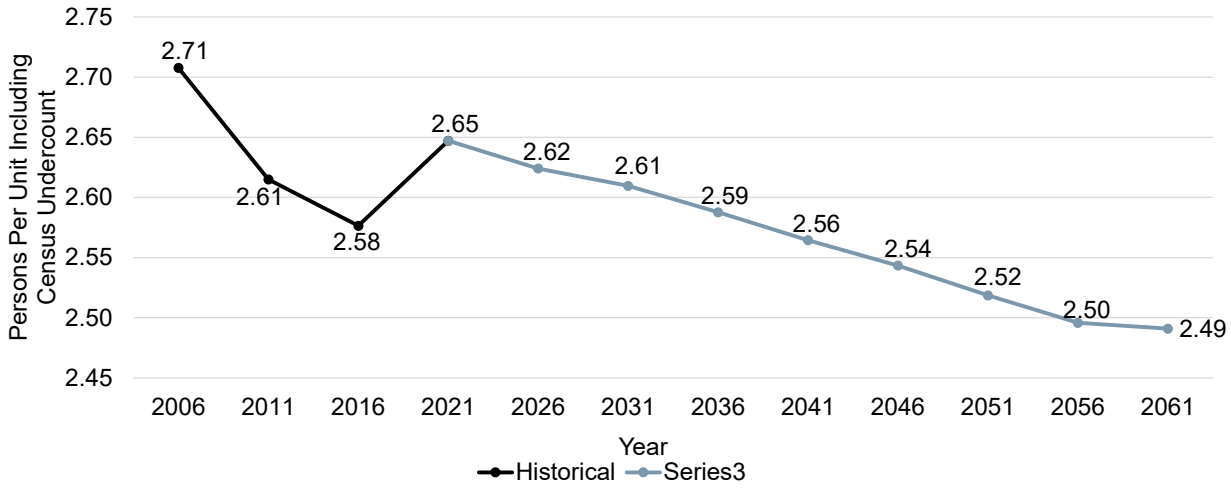
Figure 4-9 summarizes anticipated trends in long-term housing occupancy, or average persons per unit (P.P.U.), for Oxford County from 2021 to 2061. Key observations include the following:

- Between 2006 and 2021, the average P.P.U. for the Oxford County decreased from 2.71 to 2.65;
- Over the forecast period, the average P.P.U. for the County is anticipated to continue to gradually decline from 2.65 in 2021 to 2.49 in 2061, largely due to the

aging of the population combined with a gradual increase in Non-Census family households;[1] and

- Over time, the rate of P.P.U. decline is expected to moderate relative to historical trends, partially driven by stronger net migration levels attributed to working-age adults and their children.[2]

Figure 4-9
Oxford County
Recommended Persons Per Unit Forecast, 2006 to 2061



Note: Population includes net Census undercount estimated at 4.1%.
Source: Historical population by age derived from 2011 to 2021 Statistics Canada Census data; 2021 to 2061 population forecast prepared by Watson & Associates Economists Ltd.

4.5.3 Headship Rates

A household headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e. cohort). Between 2006 and 2021, Oxford County's total headship rate increased slightly from 37% to 38% (refer to Appendix C for additional details). An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age, family type, and family structure. While major

[1] As defined by Statistics Canada, non-Census-family households are either one person living alone or a group of two or more persons who live together but do not constitute a Census family.
[2] It is noted that 2021 average P.P.U. levels may be temporarily inflated resulting from impacts associated with COVID-19.

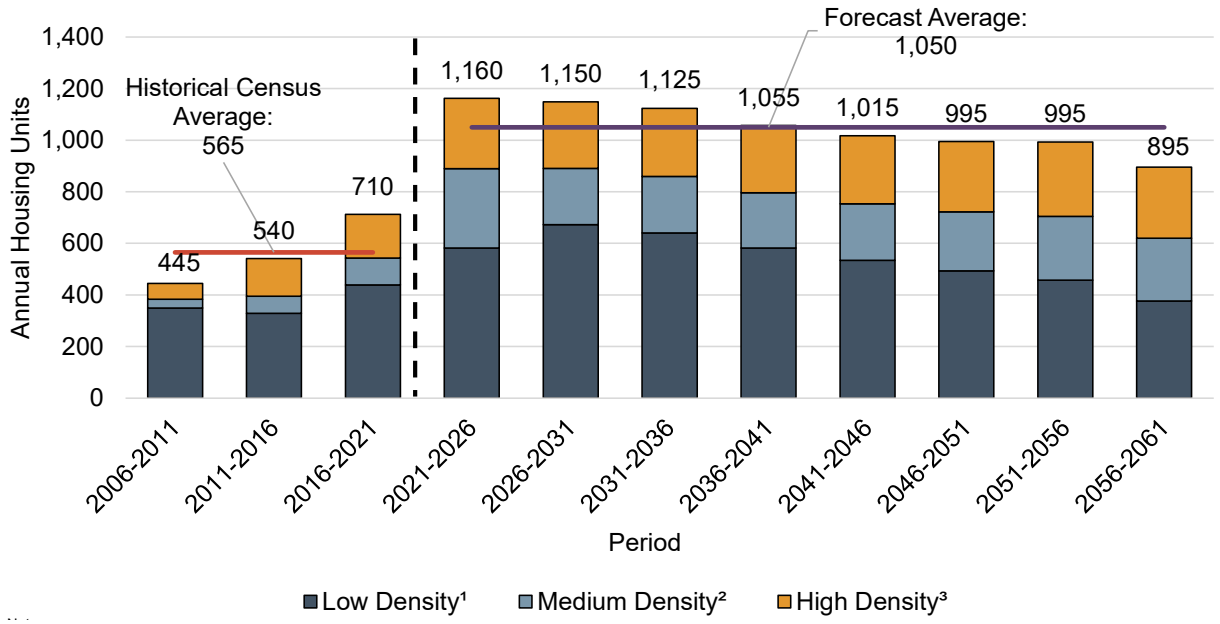
fluctuations in headship rates by age group are not common over time, the ratio of household maintainers per capita varies by population age group. For example, a municipality with a higher percentage of seniors will typically have a higher household maintainer ratio per capita (i.e. headship rate) compared to a municipality with a younger population. This is because households occupied by seniors typically have fewer children than households occupied by adults under 65 years of age. Accordingly, forecast trends in population age structure provide important insights into future headship rates and average P.P.U. trends for Oxford County, as previously discussed. It is important to note that headship rates by major age group are anticipated to remain relatively stable over the long-term forecast period.

4.5.4 Housing Forecast by Structure Type

Figure 4-10 summarizes the Oxford County's recommended housing forecast by structure type (i.e. low density, medium density, and high density) over the 2021 to 2061 forecast period in five-year growth increments. Housing units that are currently active in development approvals are discussed in Chapters 6 and 8, which serve as a guide in developing the near-term housing forecast by structure type. Key observations are as follows:

- The recommended forecast represents an average of approximately 1,050 housing units per year over the forecast period;
- Comparatively, this annual level of forecast housing growth is almost two times the historical average of 565 units per year achieved during the previous 15-year period (2006 to 2021);
- Between 2006 and 2021, the share of medium- and high-density housing constructed across the County has steadily increased. Considering recent building trends and active residential development applications, this shift toward higher-density residential development is expected to continue over the longer term;
- Over the forecast period, new residential development in Oxford County is anticipated to shift more towards medium- and high-density housing forms. This shift in dwelling type preferences is expected to be driven largely by demographics (i.e. aging of the population), housing affordability, and increasing demand for rental housing when compared to the previous two decades; and
- Over the 2021 to 2061 forecast period, new housing is expected to comprise 52% low-density units, 22% medium-density units, and 26% high-density units.

Figure 4-10
Oxford County
Recommended Housing Forecast by Structure Type, 2006 to 2061



[1] Low Density includes singles and semi-detached houses.
[2] Medium Density includes townhouses and apartments in duplexes.
[3] High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartment units and secondary units.
Notes:

- Figures have been rounded and may not add up precisely.
- A secondary unit represents a self-contained unit within an existing home/primary dwelling unit. Statistics Canada does not implicitly identify accessory apartments in the Census housing categories. They are embedded within the Census housing categories but are not reported based on the amount or in which categories they are embedded. Secondary units have high-density occupancy but a grade-related built form. For the purposes of the Growth Analysis and Land Needs, they have been included in the high-density housing category from 2021 to 2061.

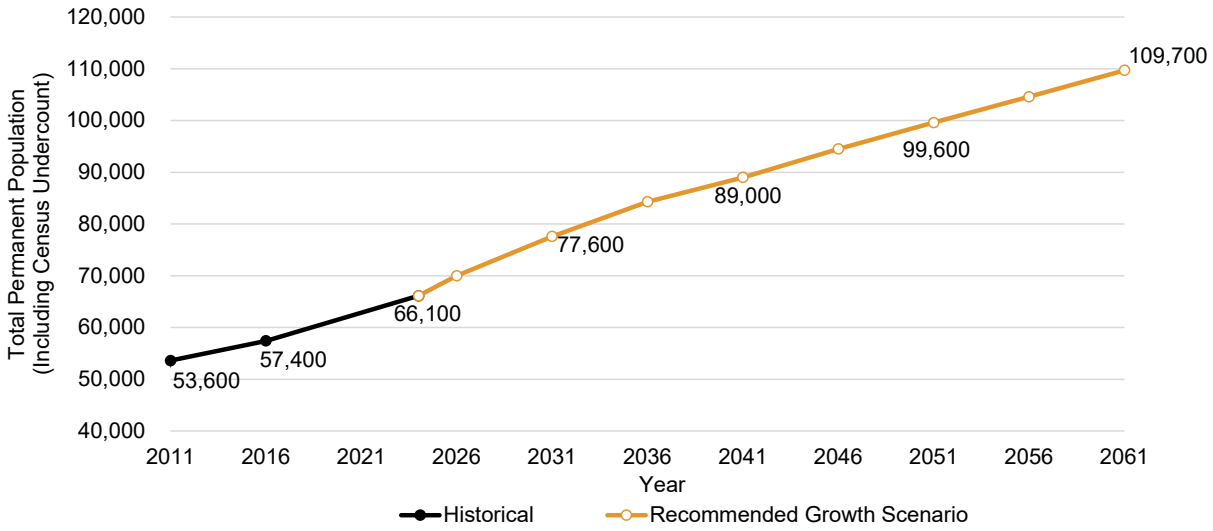
Source: Historical data derived from Statistics Canada Census profiles; forecast prepared by Watson & Associates Economists Ltd.

4.5.5 Long-Term Employment Growth, 2021 to 2061

Building on the population and housing growth forecast as well as the key macro and regional growth assumptions discussed throughout Chapter 3 and in section 4.2, a revised long-term employment growth forecast has been prepared for Oxford County in comparison with recent historical trends. As summarized in Figure 4-11, by 2061, the employment base for the County is forecast to increase by 43,600 employees, reaching

109,700 total jobs by 2061. The recommended employment growth forecast is a plausible long-term employment forecast for Oxford County, considering our review of macro, regional, and local economic trends, as well as the County's recommended long-term population growth forecast, as provided in section 4.5.

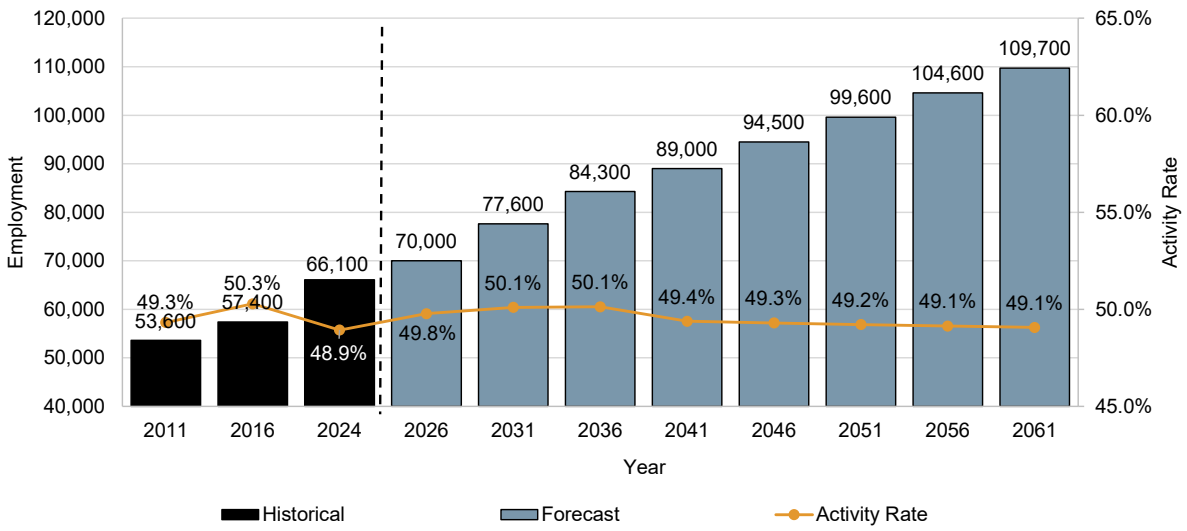
Figure 4-11
Oxford County
Recommended Long-Term Employment Forecast, 2011 to 2061



Note: Figures have been rounded. Total employment figures include work at home and no fixed place of work. Statistics Canada 2021 Census place of work employment data has been reviewed and has not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Source: 2011 to 2016 derived from Statistics Canada Census data; forecast prepared by Watson & Associates Economists Ltd.

Figure 4-12 summarizes historical and forecast trends in the employment activity rate (ratio of jobs to population) for Oxford County. Between 2006 and 2024, the employment activity rate for the County modestly increased from 49% to 50%. The County's employment activity rate is anticipated to remain relatively stable, decreasing slightly to 49% by 2061.

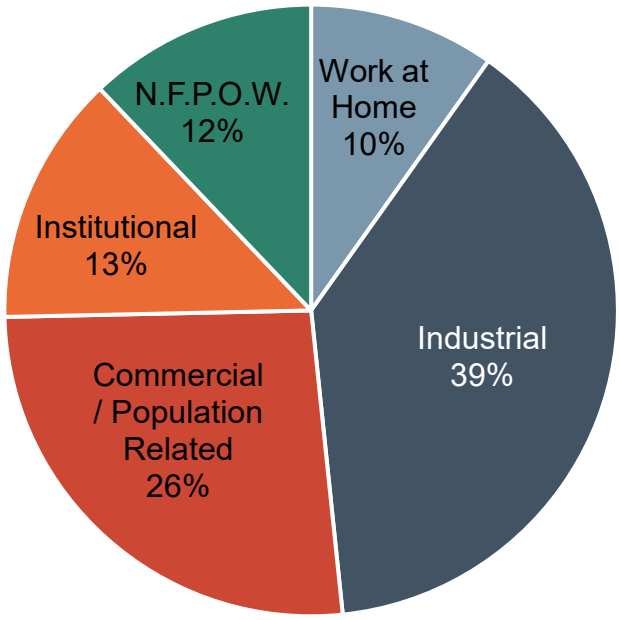
Figure 4-12
Oxford County
Recommended Long-Term Employment Forecast, 2024 to 2061



Notes:
- Figures have been rounded.
- Activity rate uses population, adjusted to account for net Census undercount.
- Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Source: 2011 to 2016 derived from Statistics Canada Census data; forecast prepared by Watson & Associates Economists Ltd.

Figure 4-13 provides further details regarding the recommended employment growth forecast by place of work and major employment sector. Of the total additional jobs identified for Oxford County over the long term, approximately 78% of jobs are anticipated to have a usual place of work, while the remaining 22% of new jobs are associated with work at home employment or off-site employees. With respect to employment by major sector, approximately 61% of job growth for the County is associated with services-producing sectors, while 39% of jobs are associated with goods-producing sectors (i.e. industrial and primary employment sectors). Additional details regarding the long-term employment forecast for Oxford County are provided in Appendix C.

Figure 4-13
Oxford County
Recommended Employment Growth Forecast by Place of Work, 2024 to 2061



Note: Figures have been rounded and may not add precisely. N.F.P.O.W. means no fixed place of work.
Source: Watson & Associates Economists Ltd.

Chapter 5
Oxford County Population, Housing, and Employment Allocations by Area Municipality

5. Oxford County Population, Housing and Employment Allocations by Area Municipality

5.1 Area Municipal Allocation Methodology

Building on the County-wide forecasts provided in Chapter 4, population, housing, and employment allocations by Area Municipality were developed based on the Preferred Growth Forecast Scenario. These allocations have been based on a detailed review of the following local supply and demand factors:

Local Supply Factors

- Supply of potential future housing stock in the development approvals process by housing structure type, approval status, and location;
- Current inventory of net vacant designated "greenfield" lands in the County's Large Urban Centres and Serviced Villages that are not currently in the development approvals process;
- Residential intensification opportunities (refer to Section 6);
- Supply of designated vacant Employment Area lands by Area Municipality;
- Consideration of water and wastewater servicing capacity; and
- Provincial, County, and Area Municipal policy direction regarding forecast residential growth by Settlement Area and Rural Area.

Demand Factors

- Historical population, housing, and employment trends based on Statistics Canada (Census) data by Area Municipality;
- A review of recent residential and non-residential building permit data by housing structure type and employment sector by Area Municipality;
- Historical commuting trends and anticipated employment growth opportunities within the surrounding market area;
- A review of local employment opportunities by sector and Area Municipality;
- Forecast population trends by major age group and associated household formation trends by age of household maintainer;
- Consideration of long-term housing needs by housing tenure (i.e. ownership vs. rental housing) and influence on housing demand by structure type; and

- Housing market demand by Area Municipality across all major demographic groups, including young adults, new families, move-up buyers, and empty nesters/seniors.

While population and employment growth rates vary significantly by geographic area, each of the Area Municipalities within the County share several common attributes with respect to near- and longer-term population growth and development trends. These include the following:

- All Area Municipalities are forecast to experience higher total annual population housing and employment growth relative to historical trends experienced between 2011 and 2021.
- While COVID-19 was disruptive to the local economy, particularly in retail, accommodation and food, and tourism-based sectors, the economic recovery following the pandemic has been strong throughout the regional economy and within each of the Area Municipalities within the County.
- Continued regional employment opportunities, particularly those related to manufacturing; goods movement; agricultural; as well other service-producing and knowledge-based sectors, represent a key driver of future employment growth within the County and its Area Municipalities.
- All Area Municipalities within the County experienced relatively higher housing development activity during the height of the pandemic between 2020 and 2022. When considering long-term historical trends over the past two decades, most Area Municipalities within the County have experienced relatively higher levels of new housing construction activity since 2015. Looking forward, the rate of annual housing growth is anticipated to moderate from the peak levels experienced during the pandemic, however, all of the County's Area Municipalities are forecast to experience stronger housing demand relative to historical trends. The driving factors contributing the higher housing demand across the County were previously discussed in Chapter 4.
- Declining housing affordability, combined with a range of broader economic headwinds, including persistently high inflation rates, rising household debt, U.S. protectionist policy, and a slower short-term economic outlook are anticipated to potentially dampen housing demand in the near term (i.e. next 12 to 24 months), relative to recent historical highs experienced during the past five years.
- Over the longer term (i.e. 10+ years), the average rate of annual housing development is anticipated to gradually slow (relative to the medium-term

forecast period) across all Area Municipalities within the County, driven by modestly slower regional and provincial economic growth associated with an aging population and regional labour force.

- Average P.P.U. levels are forecast to decline from 2021 to 2061 across all Area Municipalities.
- Low-density housing forms are forecast to continue to comprise a notable share of future housing growth; however, increasing market demand will exist for medium- and high-density housing types across all Area Municipalities.

5.2 Long-Term Population, Housing, and Employment Growth Forecast by Area Municipality

Provided below is a summary of the forecast population, housing, and employment growth trends for each of the Area Municipalities that compose Oxford County. The Area Municipal population, housing, and employment forecasts are further summarized in Figure 5-1 through Figure 5-5, with additional details provided in Appendix D

5.2.1 City of Woodstock

- The City of Woodstock has the largest population and employment base in Oxford County, accounting for 38% of the County-wide population in 2021 and 44% of County-wide jobs in 2024.
- The population within Woodstock is forecast to increase by 41,600 people from 2021 to 2061, reaching 90,300 people by 2061. This translates to an annual population growth rate of 1.6% over the 40-year forecast period. The City is forecast to accommodate approximately 43% of the County's population growth to 2061.
- To accommodate this anticipated population growth, Woodstock will need an average of 460 new dwellings to be constructed annually over the next 40 years.
- Over the forecast period, demand for new dwellings is anticipated to be 43% low-density units (singles and semi-detached), 23% medium-density units (apartments in duplexes and row houses), and 34% high-density units (stacked townhomes, apartments, and secondary units).
- The City's employment base is anticipated to increase from 29,300 jobs in 2024 to 51,900 jobs by 2061, accommodating approximately 52% of the County's employment growth over the forecast period.

- Forecast job growth is anticipated to be accommodated throughout a broad range of industrial sectors as well as population-related jobs in commercial, retail, institutional sectors. Notably, industrial jobs are forecast to comprise 43% of the City's employment growth, and 58% of the County's total long-term industrial job growth driven by the City's strategic location along Highway 401 and accessibility to surrounding regional employment markets in both the London Area and Central Ontario. Employment opportunities are also anticipated to be accommodated through home-based businesses and off-site employment such as trades and construction.

5.2.2 Town of Tillsonburg

- The Town's existing population and employment base account for 15% of the County-wide population as of 2021, and 16% of County-wide jobs as of 2024.
- The population within Tillsonburg is forecast to increase by 20,500 people from 2021 to 2061, reaching 39,300 people by 2061. This translates to an annual population growth rate of 1.9% over the next 40 years. The Town is forecast to accommodate approximately 21% of the County's population growth over the forecast period.
- To accommodate this anticipated population growth, Tillsonburg will need an average of 235 new dwelling units to be constructed annually over the next 40 years. New dwellings are anticipated to be comprised of 53% low-density units, 26% medium-density units, 21% high-density units.
- Tillsonburg's employment base is anticipated to increase from 10,400 jobs in 2024 to 18,300 jobs by 2061, accommodating approximately 18% of the County's employment growth over the forecast period.
- Employment growth opportunities in Tillsonburg exist in goods producing and service sectors. Strong demand for industrial jobs is anticipated for the Town, comprising approximately one-quarter (26%) of Town-wide employment growth and over one-tenth (13%) of County-wide industrial job growth to 2061. A notable amount of growth in the commercial and institutional sectors is forecast to service the needs of the growing population, in addition to work at home opportunities and off-site employment.

5.2.3 Town of Ingersoll

- The Town's existing population and employment base accounted for 11% of the County-wide population as of 2021, and 15% of County-wide jobs as of 2024.
- The population within Ingersoll is forecast to increase by 8,300 people from 2021 to 2061, reaching 22,600 people by 2061. This translates to an annual population growth rate of 1.2% over the next 40 years. The Town is forecast to accommodate approximately 9% of the County's population growth over the forecast period.
- To accommodate this anticipated population growth, Ingersoll will need an average of 90 new dwellings to be constructed annually over the next 40 years. Over the forecast period, new dwellings will be 56% low-density units, 18% medium-density units, and 27% high-density units.
- Ingersoll's employment base is anticipated to increase from 5,700 in 2024 to 9,100 jobs by 2061, accommodating approximately 14% of the County's employment growth over the forecast period.
- Forecast job growth is anticipated to be accommodated in a broad range of industrial and population-related employment sectors in Ingersoll. With the Town's accessibility to Highway 401, over half (57%) of the Town's job growth is anticipated in the industrial sector, comprising over one-fifth (21%) of County-wide industrial job growth to 2061. Demand is also forecast for jobs in retail, accommodation and food service, institutional sector, home based businesses, and off-site employment.

5.2.4 Township of Blandford-Blenheim

- The Township's existing population and employment base accounted for 6% of the County-wide population as of 2021, and 3% of County-wide jobs as of 2024.
- The population of Blandford-Blenheim is anticipated to reach 11,400 people by 2061. This translates to an increase of 3,500 people and an annual population growth rate of 0.9% from 2021 to 2061. The Township is forecast to accommodate approximately 4% of the County's population growth over the forecast period.
- To accommodate anticipated permanent population growth, Blandford-Blenheim will require an average of approximately 35 new dwellings to be constructed annually over the next 40 years.

- The majority of housing growth is forecast to be accommodated in the Greenfield Areas of Serviced Villages, with limited housing growth identified in the Unserviced Settlement Area, as well as the Remaining Rural Areas.
- New dwelling units in the Serviced Villages are forecast to be comprised of 71% low-density units, 17% medium-density units, and 12% high-density units.
- The Township of Blandford-Blenheim is forecast to add approximately 1,000 jobs from 2024 to 2061. Three-fifths of job growth is concentrated in the service-sector, including work at home and off-site employment. The remaining two-fifths of employment growth is in the industrial sector given the Townships connectivity to Highway 401. In accordance with the scale and anticipated market potential of the Townships Employment Areas, industrial opportunities are largely associated with small and mid-sized manufacturing, transportation and logistics industries. The agricultural sector is anticipated to provide opportunities for growth, mainly through the expansion of farms which are captured in the work at home category.
- The majority of non-residential development has been identified in the Serviced Village of Drumbo.

5.2.5 Township of East Zorra-Tavistock

- The Township's existing population and employment base accounted for 6% of the County-wide population as of 2021, and 5% of County-wide jobs as of 2024.
- The population of East Zorra-Tavistock is anticipated to reach 14,400 by 2061. This translates into an increase of 6,300 people and an annual population growth rate of 1.4% from 2021 to 2061. The Township is forecast to accommodate approximately 6% of the County's population growth over the forecast period.
- To accommodate anticipated permanent population growth, East Zorra-Tavistock will require an average of approximately 65 new dwellings to be constructed annually over the next 40 years. In the Serviced Villages, approximately 71% are anticipated to be low-density units, 19% medium-density units, and 10% in high-density units.
- The majority of future housing growth will be located in the Greenfield Areas of the Serviced Villages, with minimal housing growth in the Unserviced Rural Settlement Areas and Remaining Rural Areas.
- East Zorra-Tavistock is anticipated to add approximately 1,600 jobs from 2024 to 2061. Forecast job growth is anticipated to be accommodated through service-sector occupations such as retail, accommodation and food services, home-based businesses, and off-site employment such as trades and construction. Job

growth is also anticipated in the industrial sector to a lesser extent and would be, concentrated in the Village of Tavistock due to the availability of wastewater servicing.

- Opportunities are also anticipated for the agricultural sector, largely supported by an expanding farm base, which are captured in the work at home category.

5.2.6 Township of Norwich

- The Township's existing population and employment base account for 8% of the County-wide population as of 2021, and 8% of County-wide jobs as of 2024.
- The population of Norwich is forecast to increase by 6,600 people from 2021 to 2061, reaching 18,500 people by 2061. This translates to an annual population growth rate of 1.1% over the next 40 years. The Township is forecast to accommodate approximately 7% of the County's population growth over the forecast period.
- To accommodate the population growth forecast, Norwich will require an average of 66 new dwellings to be constructed annually over the next 40 years. In the Village of Norwich, approximately 66% are anticipated to be low-density units, 12% medium-density units, and the remaining 21% are forecast to be accommodated in high-density units.
- The Greenfield Area of the Village of Norwich will accommodate the majority of future housing growth in the Township, with some housing opportunities identified in the Unserviced Rural Settlement Areas and Remaining Rural Areas.
- Over the forecast period to 2061, Norwich is expected to add approximately 1,900 jobs. Strong employment growth is anticipated for the commercial sector, home-based businesses, and off-site employment. To a lesser extend, employment growth is also anticipated in the industrial and institutional sector. The majority of industrial development has been identified in the Serviced Village of Norwich in accordance with the existing scale of usage of industrial operations (i.e. small and medium-scale manufacturing), with limited growth opportunities in the rural area.
- Opportunities are also anticipated for the agricultural sector, largely supported by an expanding farm base, which are captured in the work at home category.

5.2.7 Township of South-West Oxford

- The Township's existing population and employment base accounted for 6% of the County-wide population as of 2021, and 5% of County-wide jobs as of 2024.
- The population within South-West Oxford is forecast to increase by 3,600 people from 2021 to 2061, reaching 11,600 people by 2061. This translates to an annual population growth rate of 0.9% over the next 40 years, which is triple the growth rate observed over the last decade. The Township will accommodate approximately 4% of the County's population growth over the forecast period.
- To accommodate anticipated permanent population growth, South-West Oxford will require an average of 30 new dwelling units to be constructed annually over the next 40 years. In the Village of Mount Elgin, approximately 77% would be low-density units, 17% medium-density units, and 6% high-density units.
- The majority of housing growth is forecast to be accommodated in Mount Elgin, with minimal housing growth identified for the Unserviced Rural Settlement Areas and Remaining Rural Areas.
- Over the forecast period to 2061, the Township is expected to add approximately 900 jobs. Most of the employment growth is anticipated in the industrial sector, home-based businesses, and off-site employment within Mount Elgin. Employment growth in commercial and institutional jobs is also forecast to a lesser extent. The agricultural sector is anticipated to provide opportunities for growth, mainly through the expansion of farms which are captured in the work at home category.

5.2.8 Township of Zorra

- The Township's existing population and employment base account for 7% of the County-wide population as of 2021, and 5% of County-wide jobs as of 2024.
- The population within Zorra is forecast to increase by 6,500 people from 2021 to 2061, reaching 15,500 people by 2061. This translates to an annual population growth rate of 1.4% over the next 40 years, significantly higher than the growth rate observed over the past decade. The Township will accommodate approximately 7% of the County's population growth over the forecast period.
- To accommodate anticipated permanent population growth, Zorra will require an average of 65 new dwellings to be constructed annually over the next 40 years. In the Serviced Villages, approximately 47% are anticipated to be low-density units, 31% medium-density units, and 22% high-density units.

- The proposed Kingwood Riverside Developments development in Thamesford is a notable master-planned community that will shape how the Township grows. This is further discussed in Chapter 8.
- Over the forecast period, the Township is expected to add approximately 1,300 jobs. Forecast job growth is anticipated to be largely accommodated through service-sector occupations such as retail, accommodation and food services, home-based businesses, and off-site employment such as trades and construction. Modest industrial job growth is also forecast in the Serviced Villages. Employment growth in the agricultural sector is largely captured in the work at home category.

Figure 5-1
Oxford County
Population Forecast by Area Municipality, 2021 to 2061

Year	City of Woodstock	Town of Tillsonburg	Town of Ingersoll	Township of Blandford Blenheim	Township of East Zorra-Tavistock	Township of Norwich	Township of South-West Oxford	Township of Zorra	Oxford County
2011	38,800	15,700	12,500	7,600	7,000	11,000	7,800	8,300	110,900
2016	42,600	16,500	13,300	7,700	7,400	11,500	8,000	8,500	115,300
2021	48,700	18,800	14,300	7,900	8,200	11,900	8,000	9,000	126,700
2031	60,000	24,300	16,700	9,000	10,200	14,200	9,300	11,300	154,900
2041	71,100	30,100	19,100	9,900	10,800	15,400	9,900	13,000	180,200
2051	80,800	34,900	20,900	10,700	13,000	17,000	10,800	14,300	202,300
2061	90,300	39,300	22,600	11,400	14,400	18,500	11,600	15,500	223,600
Total Population Growth									
2011 to 2021	9,900	3,100	1,800	300	1,200	900	200	700	11,400
2021 to 2031	11,300	5,500	2,400	1,100	2,000	2,300	1,300	2,300	28,200
2021 to 2041	22,400	11,300	4,800	2,000	3,400	3,500	1,900	4,000	53,500
2021 to 2051	32,100	16,100	6,600	2,800	4,800	5,100	2,800	5,300	75,600
2021 to 2061	41,600	20,500	8,300	3,500	6,200	6,600	3,600	6,500	96,900
Annual Population Growth Rate									
2011 to 2021	2.3%	1.8%	1.4%	0.4%	1.6%	0.8%	0.3%	0.8%	1.6%
2021 to 2031	2.1%	2.6%	1.6%	1.3%	2.2%	1.8%	1.5%	2.3%	2.0%
2021 to 2041	1.9%	2.4%	1.5%	1.1%	1.7%	1.3%	1.1%	1.9%	1.8%
2021 to 2051	1.7%	2.1%	1.3%	1.0%	1.5%	1.2%	1.0%	1.6%	1.6%
2021 to 2061	1.6%	1.9%	1.2%	0.9%	1.4%	1.1%	0.9%	1.4%	1.4%

Note: Population includes net Census undercount estimated at approximately 4.1%. Figures may not add precisely due to rounding.
Source: 2011 to 2021 derived from Statistics Canada Census data; 2021 to 2061 forecast by Watson & Associates Economists Ltd.

Figure 5-2
Oxford County
Housing Forecast by Area Municipality, 2021 to 2061

Year	City of Woodstock	Town of Tillsonburg	Town of Ingersoll	Township of Blandford Blenheim	Township of East Zorra-Tavistock	Township of Norwich	Township of South-West Oxford	Township of Zorra	Oxford County
2011	15,650	6,695	4,770	2,595	2,370	3,560	2,540	2,860	43,365
2016	17,145	7,130	5,085	2,720	2,710	3,715	2,690	3,075	44,260
2021	18,890	8,030	5,495	2,775	2,980	3,845	2,635	3,155	47,810
2031	23,800	10,465	6,430	3,200	3,765	4,670	3,045	3,985	59,365
2041	28,625	13,070	7,470	3,580	4,340	5,220	3,320	4,650	70,265
2051	33,050	15,290	8,320	3,940	4,960	5,870	3,630	5,270	80,330
2061	37,240	17,335	9,095	4,265	5,535	6,485	3,930	5,890	89,775
Total Housing Growth									
2011 to 2021	3,200	1,220	710	160	470	250	50	220	6,250
2021 to 2031	4,910	2,440	930	420	790	820	410	830	11,555
2021 to 2041	9,740	5,040	1,970	800	1,360	1,370	680	1,490	22,455
2021 to 2051	14,160	7,260	2,820	1,160	1,980	2,020	990	2,110	32,520
2021 to 2061	18,350	9,310	3,600	1,490	2,560	2,640	1,290	2,730	41,965
Annual Housing Growth									
2011 to 2021	320	122	71	16	47	25	5	22	625
2021 to 2031	491	244	94	43	79	83	41	83	1,156
2021 to 2041	487	252	99	40	68	69	34	75	1,124
2021 to 2051	472	242	94	39	66	68	33	71	1,084
2021 to 2061	459	233	90	37	64	66	32	68	1,049

Figure 5-3
Oxford County
Employment Forecast by Area Municipality, 2024 to 2061

Year	City of Woodstock	Town of Tillsonburg	Town of Ingersoll	Township of Blandford Blenheim	Township of East Zorra-Tavistock	Township of Norwich	Township of South-West Oxford	Township of Zorra	Oxford County
2011	23,200	7,900	8,800	2,400	2,400	3,500	2,300	3,100	53,600
2016	25,400	8,600	9,000	1,800	2,800	4,000	2,900	2,800	57,300
2024	29,300	10,400	9,900	1,900	3,200	5,100	3,400	3,000	66,200
2031	35,200	12,400	11,600	2,200	3,600	5,600	3,700	3,400	77,700
2041	41,100	14,500	13,300	2,400	4,000	6,000	3,900	3,700	88,900
2051	46,600	16,500	14,700	2,700	4,400	6,500	4,100	4,000	99,500
2061	51,900	18,300	16,200	2,900	4,800	7,000	4,300	4,300	109,700
Total Employment Growth									
2011 to 2024	6,100	2,500	1,100	-500	800	1,600	1,100	-100	12,600
2024 to 2031	5,900	2,000	1,700	300	400	500	300	400	11,500
2024 to 2041	11,800	4,100	3,400	500	800	900	500	700	22,700
2024 to 2051	17,300	6,100	4,800	800	1,200	1,400	700	1,000	33,300
2024 to 2061	22,600	7,900	6,300	1,000	1,600	1,900	900	1,300	43,500
Annual Employment Growth Rate									
2011 to 2024	1.8%	2.1%	0.9%	-1.8%	2.2%	2.9%	3.1%	-0.3%	1.6%
2021 to 2031	2.7%	2.5%	2.3%	2.1%	1.7%	1.3%	1.2%	1.8%	2.3%
2024 to 2041	2.0%	2.0%	1.8%	1.4%	1.3%	1.0%	0.8%	1.2%	1.7%
2024 to 2051	1.7%	1.7%	1.5%	1.3%	1.2%	0.9%	0.7%	1.1%	1.5%
2024 to 2061	2.1%	2.1%	1.8%	1.6%	1.5%	1.2%	0.9%	1.3%	1.9%

Note: Figures may not add precisely due to rounding.
Source: 2006 to 2016 derived from Statistics Canada Census data; 2024 to 2061 forecast by Watson & Associates Economists Ltd.

Figure 5-4
Oxford County
Percentage Permanent Population Forecast by Area Municipality, 2021 to 2061

Area Municipality	2021 Population (%)	Percent of 2021-2061 Population Growth	2061 Population (%)
City of Woodstock	38%	43%	40%
Town of Tillsonburg	15%	21%	18%
Town of Ingersoll	11%	9%	10%
Township of Blandford-Blenheim	6%	4%	5%
Township of East Zorra-Tavistock	6%	6%	6%
Township of Norwich	9%	7%	8%
Township of South-West Oxford	6%	4%	5%
Township of Zorra	7%	7%	7%
Oxford County	**100%**	**100%**	**100%**

Note: Figures may not add precisely due to rounding. Population includes a net Census undercount estimated at approximately 4.1%.
Source: 2021 derived from Statistics Canada Census data; 2021 to 2061 forecast by Watson & Associates Economists Ltd.

Figure 5-5
Oxford County
Percentage Employment Forecast by Area Municipality, 2024 to 2061

Area Municipality	2024 Employment (%)	Percent of 2024-2061 Employment Growth	2061 Employment (%)
City of Woodstock	44%	52%	47%
Town of Tillsonburg	17%	18%	17%
Town of Ingersoll	15%	14%	15%
Township of Blandford-Blenheim	3%	2%	3%
Township of East Zorra-Tavistock	5%	4%	4%
Township of Norwich	8%	4%	6%
Township of South-West Oxford	5%	2%	4%
Township of Zorra	5%	3%	4%
Oxford County	**100%**	**100%**	**100%**

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Chapter 6
Intensification Housing Supply

6. Intensification Housing Supply Potential

A short-term intensification supply analysis has been prepared within defined areas, as informed by County and Area Municipal staff feedback. The following provides a summary overview of the context/purpose, methodology and results of this intensification analysis.

6.1 Context and Purpose

As part of the broader Land Needs Assessment (L.N.A.), the intensification analysis was focused on identifying potential opportunities to accommodate growth within identified node and corridor areas over the short term (within approximately 10 years). These areas are shown in Appendix H. This exercise supports the L.N.A. by providing insight on the potential residential intensification supply compared to demand for residential intensification.

The intensification analysis is intended as a strategic "big picture" look at possible intensification sites within identified nodes/corridors, with the following notes:

- The analysis was focused on short-term opportunities with minimum constraints and was not intended to capture every possible opportunity for intensification.
- The analysis is not prescriptive. If an area was identified as having intensification potential, it does not infer that planning approvals would be granted or guarantee that a project would be otherwise be feasible or proceed.
- Likewise, areas not identified in this initial analysis may still be candidates for future redevelopment.

As market conditions evolve, the intensification analysis should be revisited over time to ensure alignment with long-range planning objectives and emerging opportunities. Monitoring intensification rates, overall growth, and updates to population and employment forecasts (which are typically revisited every five years) will be an important part of implementation.

6.2 Methodology

As described below, the intensification analysis was completed in four broad steps:

- Identify Nodes and Corridors / Areas of Interest;
- Establish Constraints;
- Establish Built Form Types; and
- Identify Short-term Potential.

Nodes and Corridors / Areas of Interest: The basis for the nodes and corridors was existing land use designations where mixed use and/or higher-density residential development is permitted or would be appropriate based on existing activity and connectivity (i.e., Central Business District, Entrepreneurial District, Neighbourhood Shopping Area, Regional Commercial Node, Service Commercial, and Village Core designations). At the outset of the project, it was agreed that the boundaries of the nodes and corridors in Plattsville, Tavistock, Thamesford, Ingersoll, and Woodstock could be expanded beyond those land use designations to include other areas that had development potential due to large lot sizes, vacant and/or underutilized parcels, and proximity to main routes and/or activity areas. Refer to the mapping in Appendix H.

Constraints: To establish a net developable land area, the County provided a constraints layer that included institutional and established community uses (e.g. parks, schools, etc.), environmental/natural heritage features/flood hazard, recently redeveloped parcels.

Establish Built Form Types: A set of five built form types was developed to reflect representative types of intensification that could occur in the County. These were informed by Official Plan Policies, the April 2023 staff presentation to Council on residential density, and any existing Central Area Design Studies. Each built form type includes a density of units per net hectare to provide a total unit count to inform supply. The built form types considered in this analysis include low, medium, and high-density built forms.

Short-Term Potential: To assess intensification potential, two main steps were taken. First, parcels were identified as having intensification potential based on an assessment of:

- Existing vacant parcels or buildings;
- Underutilized parcels or large parcels with underutilized areas, such as large parking lots;
- Single-storey commercial uses that are located on main streets, at key intersections, and/or on underutilized parcels;
- Presence of aging or poor building conditions;
- Recent municipal strategies/plans;
- Recent owner/developer inquiries; and
- Existing development applications.

Once a parcel was identified as having potential one of the five built form type was applied. The selected built form type was informed by the location, surrounding context, known development plan, and parcel size. To summarize, the following was generally considered for each built form type:

- **Low Density, Low Rise Residential 1 to 3 storeys (Type 1)** was selected for those opportunities that were at the edges of the Nodes/Corridor reflecting a transitional use or in Serviced Villages for built form compatibility considerations;
- **Medium Density, Low-Rise Residential 2 to 4 storeys (Type 2)** was selected for parcels located in established residential areas where an incrementally higher density is appropriate. These sites are typically adjacent to or within existing built form clusters that already support medium density, providing a gradual transition between lower and higher density areas;
- **Mixed-Use, Low-Rise Residential 2 to 4 storeys (Types 3)** was selected for main street commercial areas or where there was a known desire to include a mixture of uses.
- **High Density, High-Rise Residential 5 to 8 storeys (Type 4)** was selected for sites where a higher density was appropriate based on surrounding development applications, and the overall urban character of the areas.
- **High Density, High-Rise Residential 9+ storeys (Type 5)** was created for circumstances where parcels were at least 0.5 hectares in size and located in areas that already include higher densities. No sites were identified as Type 5 as part of this analysis.

6.3 Intensification Results within Nodes and Corridors

Figure 6-1 provides a summary of the estimated potential housing yields within the nodes and corridors. It is important to note that the intensification potential includes active development applications comprising approximately 600 housing units. The total intensification potential within the nodes and corridors, excluding active applications, is approximately 1,470 housing units.

Figure 6-1
Oxford County
Nodes and Corridors
Short-Term Intensification Supply (Based on Median Density)

Location	Low-Density Units	Medium-Density Units	High-Density Units	Total Housing Units
Woodstock*	1	516	213	**730**
Ingersoll	0	250	0	**250**
Tillsonburg*	1	312	510	**822**
Blandford-Blenheim	1	68	0	**69**
Drumbo*	1	24	0	**25**
Plattsville	0	43	0	**43**
East Zorra-Tavistock	2	87	0	**89**
Innerkip	2	22	0	**24**
Tavistock*	0	65	0	**65**
Norwich (Norwich Village)	0	5	0	**5**
South-West Oxford (Mount Elgin)	0	13	0	**13**
Zorra	2	98	0	**100**
Embro	2	9	0	**11**
Thamesford	0	89	0	**89**
Total	**6**	**1,350**	**723**	**2,079**
Total Excluding Active Applications	**6**	**1,069**	**393**	**1,469**

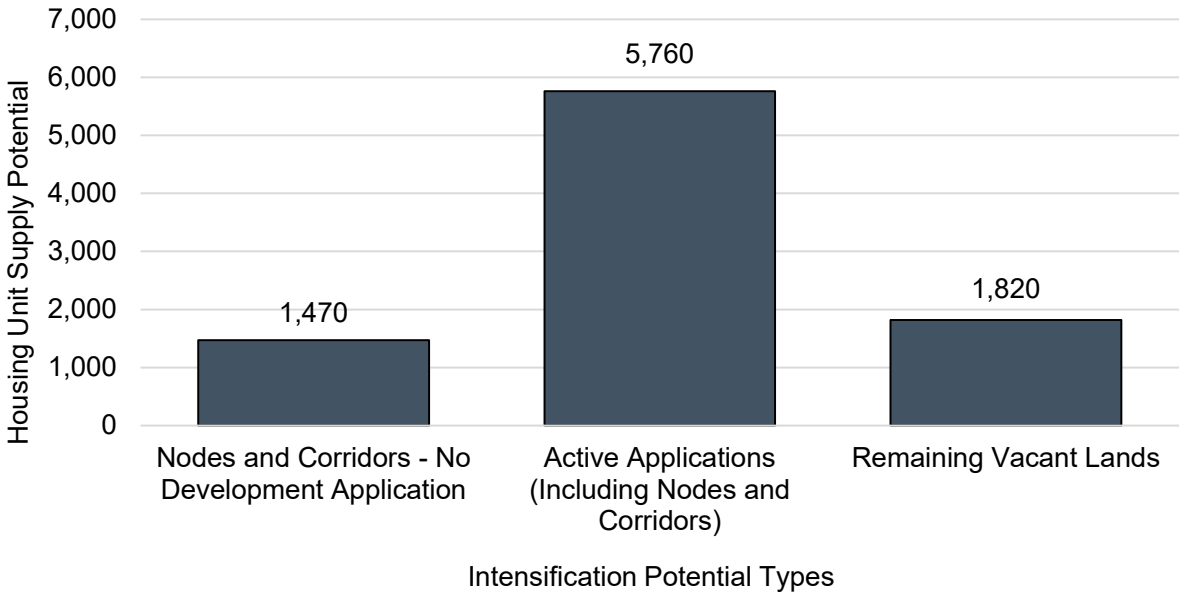
* Note: Includes manual input of proposed units identified through active development applications.
Source: Dillon Consulting Limited.

6.4 Total Housing Supply in the Built-Up Area

In addition to the intensification potential within nodes and corridors, there are other intensification opportunities within the County in other locations within the B.U.A. It is estimated that approximately 5,070 housing units can be accommodated in the B.U.A. in active applications and 1,820 housing units on remaining vacant lands (i.e. infill sites). In total, the B.U.A. has a potential of approximately 9,050 housing units including the nodes and corridors intensification, development applications, and remaining vacant lands potential.

Figure 6-2 provides a breakdown of the housing supply within the B.U.A. As of early 2024, approximately 5,760 housing units within the B.U.A. were within the development approvals process (remaining registered, draft approved, submitted, and serious inquiries) across the County's municipalities. This accounts for 76% of the County's potential supply of new residential development in the B.U.A.

Figure 6-2
Oxford County
B.U.A.
Total Housing Unit Supply Potential by Category



Source: Watson & Associates Economists Ltd, based on land supply information from Oxford County and Dillon Consulting Limited.

Chapter 7
Opportunities to Accommodate Residential and Non-Residential Development

7. Opportunities to Accommodate Residential and Non-Residential Development

7.1 Approach to Assessing Residential Land Supply

Working with the Oxford County planning staff and Dillon, Watson has summarized the residential housing supply potential as of late 2023 within the Serviced Villages and Large Urban Centres in accordance with two major policy areas: B.U.A. and Greenfield Area. Within the B.U.A., there are two sub-areas: Nodes and Corridors and the Remaining B.U.A. Analysis of the Nodes and Corridors supply within the B.U.A. was carried out by Dillon with input from County staff and staff from local municipalities and identified vacant and redevelopment opportunities within key intensification areas of the County's Large Urban Centres and Serviced Villages. The land supply that falls within the B.U.A. is considered intensification potential, while the land supply that falls within the Greenfield Areas is directly utilized in the land needs assessment. Watson took an intensification-first approach, and as a result, all identified at-grade housing unit supply potential (i.e. low and medium-density housing) in the B.U.A. has been utilized over the planning horizon before assessing land needs.

Active Applications

- County planning staff have inventoried the supply in all active applications in the Large Urban Centres and Serviced Villages. No changes have been made by Watson. Active applications are organized according to whether they are in the B.U.A. or within Greenfield Areas.

Vacant Lands with no Applications

- County planning staff have inventoried the vacant land in the Serviced Villages and Large Urban Centres with no active applications. These lands are inventoried based on land area and the County has provided assumptions on the type of housing that may be accommodated on the vacant land (i.e. low-density, medium-density and high-density housing units) based on the available information, such as existing land use designations and/or zoning, Secondary Plan land use plans, development inquiries, etc.
- To convert the lands to housing potential, Watson has applied an average gross-to-net factor, recognizing sites may require internal infrastructure upon

subdivision of land. The gross-to-net factor is a downward adjustment and is applied differently to the Townships versus the larger municipalities (City of Woodstock, Town of Ingersoll and City of Tillsonburg) and includes the following:
    - Woodstock, Ingersoll and Tillsonburg: 55%
    - Townships: 60%
- The average housing units per hectare assumption is based on trends observed within the County, as well as assumptions generated in land needs assessments for comparable municipalities across southwestern Ontario. The average units per hectare assumption is considered an average, recognizing that there may be variation by development. The County's Large Urban Centres – Woodstock, Ingersoll and Tillsonburg have a higher units per hectare assumption than the Serviced Villages in the Townships. Below are the units per hectare assumptions utilized to determine housing yields on vacant lands with no active application:
    - Woodstock, Ingersoll and Tillsonburg:
        - Low Density (single detached/semi-detached): 23 units per hectare
        - Medium Density (townhouses): 42 units per hectare
        - High Density (apartments): 80 units per hectare
    - Serviced Villages in the five Townships:
        - Low Density (single detached/semi-detached): 19 units per hectare
        - Medium Density (townhouses): 35 units per hectare
        - High Density (apartments): 50 units per hectare

Intensification Opportunities within Nodes and Corridors

- As previously discussed, the Nodes and Corridors identify vacant and redevelopment opportunities within key intensification areas of the County's Large Urban Centres and Urban Serviced Villages. The results of this analysis, carried out by Dillon, assisted in informing Watson's intensification analysis.

Future Urban Growth Lands (Not Designated Yet)

In addition to the above housing supply potential, the County has Future Urban Growth (F.U.G.) lands. These are additional lands that may be required for settlement or employment purposes during or after the planning period. Refer to Appendix E for further information on Future Urban Growth lands.

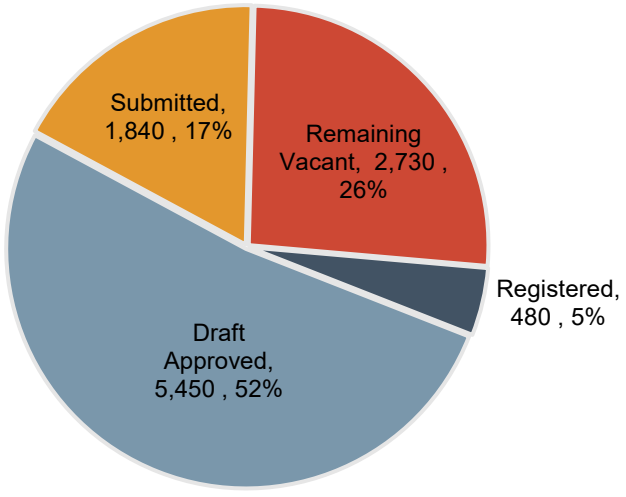
7.1.1 Housing Unit Supply Potential

7.1.1.1 Total Housing Unit Supply Potential in Greenfield Areas

Figures 7-1 through 7-3 summarize the total housing units in active applications within the Greenfield Areas by development status, and housing type. Key observations are as follows:

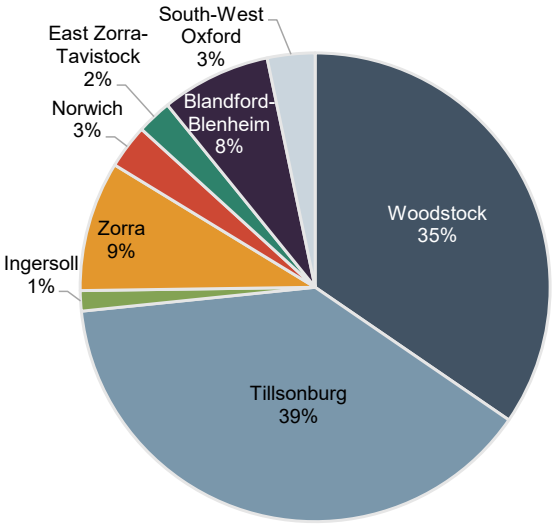
- Within the Greenfield Areas, the majority of the total housing unit supply potential is within active applications, while remaining vacant lands account for a quarter of the total housing unit supply. Of the total housing unit supply in active applications, 70% of the active applications are draft approved and another 5% are registered unbuilt housing units, suggesting a significant amount of total supply will be available for development over the short and medium terms.
- Within the County, the Town of Tillsonburg has the largest share of potential housing units in active applications in Greenfield Areas, comprising about 39% of total housing units in Oxford's Greenfield Areas.
- In the Greenfield Areas, the majority of housing units in active applications are ground-oriented, 48% are low-density, 31% are medium-density, and the remaining 21% are high-density housing units.

Figure 7-1
Oxford County
Total Housing Unit Supply Potential in Greenfield Areas by Status



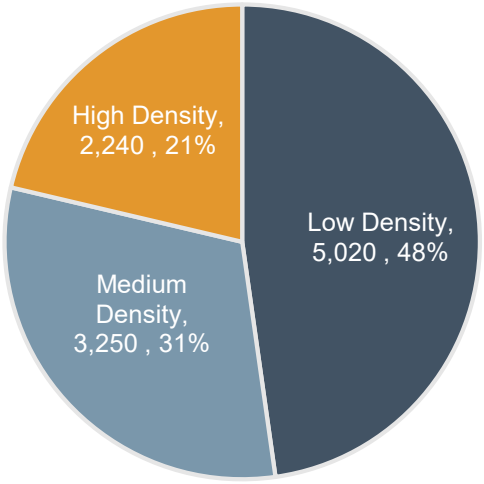
Source: Development Application data provided by Oxford County, summarized by Watson & Associates Economists Ltd.

Figure 7-2
Oxford County
Total Housing Supply in Greenfield Areas by Area Municipality



Source: Development Application data provided by Oxford County, summarized by Watson & Associates Economists Ltd.

Figure 7-3
Oxford County
Total Housing Supply in Greenfield Areas by Housing Type



Source: Development Application data provided by Oxford County, summarized by Watson & Associates Economists Ltd.

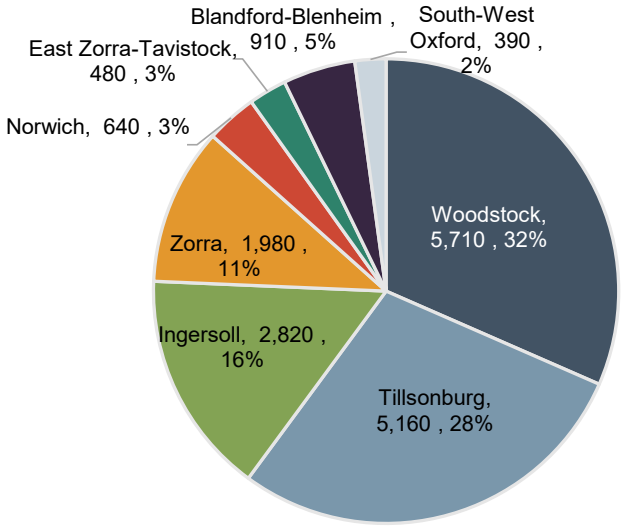
7.1.1.2 Total Housing Supply Potential in the B.U.A. and Greenfield Areas

As discussed in Chapter 6, the County has the potential to accommodate approximately 7,230 housing units within the B.U.A. Figures 7-4 and 7-5 provide a summary of the housing supply, including opportunities in the County's Greenfield areas. Key observations include:

- The City of Woodstock has the greatest share of housing unit supply potential in the B.U.A. and Greenfield Areas within the County, with 32% of the total housing unit supply;
- Housing density types are equally represented in applications within the B.U.A. and Greenfield Areas, indicating there is a broad range of housing types in the development pipeline (i.e. active applications);
- The Large Urban Centres have the greatest housing share potential in the County, making up 76% of the total housing supply potential; and
- Oxford County has potential to accommodate approximately 18,100 total housing units within the B.U.A. and Greenfield Areas within the Area Municipalities.

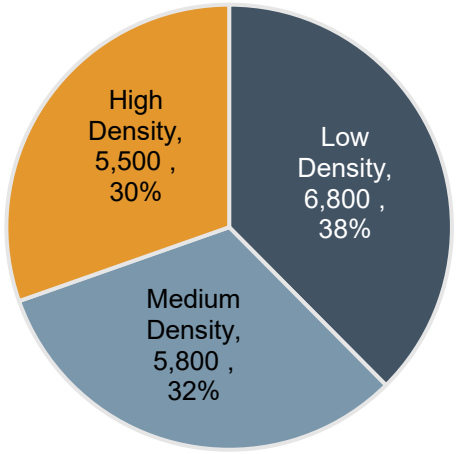
Refer to Appendix E for detailed tables on housing supply potential in Oxford County.

Figure 7-4
Oxford County
Total Housing Unit Supply in the B.U.A. and Greenfield Areas by Area Municipality



Source: Data provided by Oxford County, summarized by Watson & Associates Economists Ltd.

Figure 7-5
Oxford County
Total Housing Supply in the B.U.A. and Greenfield Areas by Housing Type



Source: Data provided by Oxford County, summarized by Watson & Associates Economists Ltd.

7.2 Commercial and Institutional Land Supply

Creating complete communities means ensuring residents have access to a variety of services, jobs, and amenities close to home. To achieve this, a range of commercial and institutional uses will need to be accommodated in the Community Areas. Oxford County has compiled an inventory of vacant commercial and institutional lands within its Large Urban Centres and Serviced Villages as of late 2023. As shown in Figure 7-6, the County has approximately 148 gross developable hectares (approximately 366 developable acres) of designated land for commercial and institutional uses. Using a gross-to-net assumption of 80% to account for internal infrastructure requirements, this equates to roughly 118 net hectares (292 net acres). An additional 15% reduction was then applied to this figure to account for long-term vacancy. This adjustment accounts for lands that may not be developed within the planning horizon due to factors such as marketability, site constraints, parcel configuration, and landowner willingness. After this adjustment, Oxford County has an estimated **101 net hectares (approximately 250 net acres) of vacant commercial and institutional land available for development.**

A large portion of the vacant commercial and institutional land supply is within the City of Woodstock, representing more than half of the County's vacant commercial and institutional land available. In contrast, the Township of South-West Oxford currently does not have any designated commercial or institutional lands available.

Figure 7-6
Oxford County
Vacant Commercial and Institutional Land Supply (Hectares)
in Large Urban Centres and Serviced Villages

Area Municipality	Commercial/ Institutional Land Supply, Gross Developable Hectares	Commercial/ Institutional Land Supply, Net Developable (80%), Hectares	Commercial/ Institutional Land Supply, Adjusted (15% long-term vacancy), Net Hectares[1]
Woodstock	79	63	54
Ingersoll	24	20	17
Zorra	25	20	17
Tillsonburg	12	10	8
Blandford-Blenheim	5	4	3
Norwich	1	1	1
East Zorra-Tavistock	2	1	1
South-West Oxford	-	-	-
Total	**148**	**118**	**101**

[1] A long-term land vacancy adjustment of is applied to account for lands that may not develop over the planning horizon for various factors such as marketability, site constraints, parcel configuration, landowner willingness, etc.
Source: Derived from land supply information from Oxford County. Summarized by Watson & Associates Economists Ltd., 2025.

Chapter 8 will further explore whether the current supply of designated commercial and institutional land is generally adequate to meet these needs and support future growth by the Area Municipality. It is important to recognize that this study focuses on the quantity of designated commercial and institutional land, not its quality or the anticipated types of commercial and institutional uses. The demand for these uses is heavily influenced by factors that are not within the scope of this analysis and vary by commercial and institutional uses. For example, a grocery store would require sites of at least 2 hectares in size with good frontage, while a commercial service business (e.g. restaurant) could be easily accommodated on an infill site. In some cases,

municipalities may have enough commercial land in terms of quantity but lack the variety of sites needed for a full range of commercial uses.

7.3 Employment Area Land Supply

Employment Areas in the County serve to create local industrial type employment opportunities and a diversified employment and economic base. To achieve this, Employment Areas in Oxford should include a range of parcels for a variety of uses and should be located in proximity to Highways 401 and 403, and other major routes. According to section 2.1.4 of the O.P. the County will maintain a "sufficient supply of land designated for employment purposes in strategic locations within settlements throughout the County." The goal is to "accommodate a range and mix of employment opportunities to meet projected need, including a surplus to ensure an efficient land market."

Figure 7-7 provides a summary of the Employment Area land supply by Area Municipality as of late 2023. This supply only includes Employment Area lands within the Large Urban Centres and Serviced Villages in the Townships. The County has approximately 848 gross developable hectares (approximately 2,095 acres) of designated land for commercial and institutional uses. Any lands within the settlement boundary, or that are added to the settlement area, that are subsequently designated for industrial uses would be added to the supply that is tracked by the County. Using a gross-to-net assumption of 80% to account for internal infrastructure requirements, this equates to roughly 679 net hectares (approximately 1,680 net acres). A long-term land vacancy adjustment of 15% is applied to account for lands that may not develop over the planning horizon for various factors such as marketability, site constraints, parcel configuration, landowner willingness, etc. The total vacant Employment Area land supply in Oxford County is approximately 580 hectares (approximately 1,425 acres), adjusted for the long-term vacancy adjustment.

Key observations are as follows:

- The three Large Urban Centres have the largest amount of available Employment Area land within the County. Of the three, Woodstock has the largest amount of Employment Area land supply with approximately 324 hectares (approximately 800 acres); and

- While all the County's Area Municipalities have vacant Employment Area land, the Townships of Zorra and East Zorra-Tavistock have minimal vacant Employment Area land supply available.

Figure 7-7
Oxford County
Employment Area Land Supply (Hectares)
in Large Urban Centres and Serviced Villages

Municipality	Employment Supply, Gross Developable Hectares	Employment Supply, Net Developable (80%) Hectares	Employment Supply, Adjusted (15% long-term vacancy), Net Hectares
Woodstock [1]	429	343	291
Ingersoll	272	218	185
Tillsonburg	83	67	57
Norwich	23	19	16
Blandford Blenheim	21	17	14
South-West Oxford	16	13	11
East Zorra-Tavistock	4	3	2
Zorra	1	1	1
Total	**848**	**679**	**577**

[1] There are lands outside of the settlement boundary that have been identified for industrial use through the Southeast Woodstock Secondary Plan. These lands were not included in the employment land supply as they still require additional planning study prior to being brought into the settlement boundary, but would be a priority for any future settlement area boundary expansion for employment uses.
Source: Watson & Associates Economists Ltd.

Chapter 8 will further explore whether the current supply of designated Employment Area is generally adequate to meet these needs and support future growth by the Area Municipality. It is important to note that this analysis focuses on the quantity of land, not its market-readiness. The study does not evaluate factors such as site quality or assess the amount of shovel-ready land supply, which significantly impacts the timing and marketability of the land.

Chapter 8
Community Area Land Needs

8. Community Area Land Needs

8.1 Introduction

The Community Area L.N.A. addresses lands within the settlement boundaries of Large Urban Centres and the Serviced Villages that are planned to support a mix of uses, including residential, commercial and institutional development. Since residential development represents the largest portion of a Community Area, the L.N.A. process first conducts a detailed analysis of residential land needs. This provides a foundation for the overall assessment of Community Area land needs. Once residential needs are determined, a broader, high-level assessment is provided for other land uses, such as commercial and institutional needs. This subsequent analysis accounts for the land required for retail, schools, healthcare facilities, and other commercial and institutional uses that support the residential population. As previously discussed in Chapter 2, the L.N.A. carried out is generally consistent with the proposed Provincial Methodology Guideline (P.M.G.) document.[1]

8.2 Approach

To assess land needs, requirements, and intensification potential, the County has been categorized by community structure components. A community structure provides the foundation of how the County will direct and manage growth and change. Each component has a distinct role in accommodating growth and addressing change, and it is guided by provincial and local planning policies. Key components of the County's community structure are discussed below.

Key Broad Geographic Areas

- **Serviced Settlement Areas:** includes fully serviced settlements with municipal water and wastewater servicing. This includes the Large Urban Centres (Woodstock, Ingersoll and Tillsonburg) and the eight Serviced Villages located within the give Townships. Designated land in these settlement areas are assessed in the L.N.A.

[1] Provincial Methodology Guideline to Support the Implementation of the P.P.S., 2024, August 11, 2025.

- **Rural Settlement Areas and Remaining Rural Areas:** include settlement areas with partial or no municipal servicing and the remaining rural areas. There are numerous settlement areas across the County, including Villages and Rural Clusters. The designated land supply in these settlement areas is not assessed in detail, given that growth is largely intended to be limited to minor infilling and smaller scale developments within the existing settlement boundaries.

Key Policy Areas within the Serviced Settlement Areas[1]

- **Community Areas:** these areas are planned to support a mix of uses, including residential, commercial and institutional development within the County's Serviced Settlement Areas (Large Urban Centres and Serviced Villages). Within the Community Area there are two sub-components:
    - **Built-up Area (B.U.A.):** the area within the Built Boundary. This is the area that is largely already subdivided, and a large portion is developed or currently undergoing development. Refer to Appendix E for maps the illustrate the Built Boundary. Development within this area represents intensification. Within the B.U.A., nodes and corridors (as discussed in Chapter 6) are identified as priority areas for intensification, representing lands that offer demand and supply opportunities to accommodate intensification. Opportunities to accommodate housing in the B.U.A. are assessed prior to identifying housing needs within Greenfield Areas, representing an "intensification-first" approach to accommodating housing growth.
    - **Greenfield Areas:** the area outside the Built Boundary but still within the settlement area boundaries of Large Urban Centres and Serviced Villages and designated for residential development. This is the area that is largely undeveloped, including land within the settlement area planned for future community area development. A key objective of the L.N.A. is to identify any additional land that will need to be brought into the settlement area over the planning horizon. Additional land brought into settlement (i.e. through a Settlement Area Boundary Expansion) would be considered Greenfield Areas.
- **Employment Areas:** these areas are planned to accommodate industrial-type development that requires separation from sensitive uses, such as residential

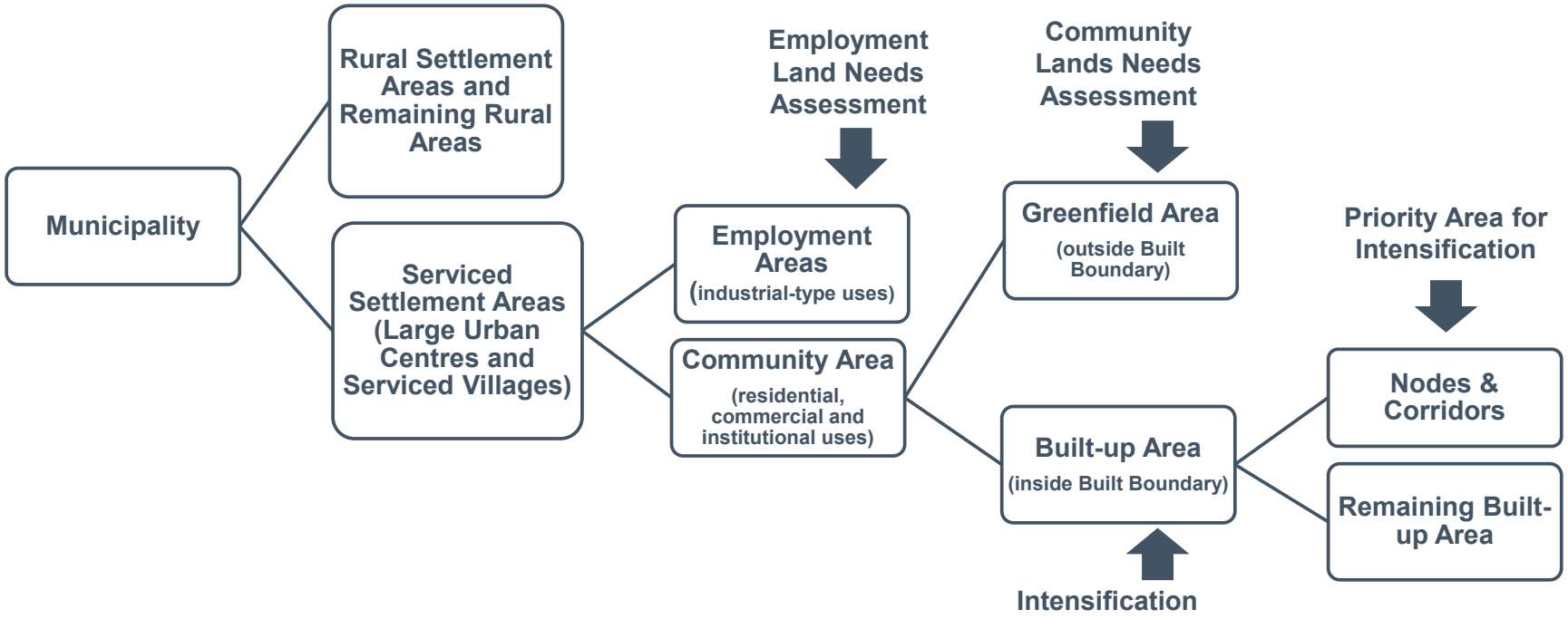
[1] Urban Area includes Large Urban Centres and Serviced Villages.

and major retail uses. These areas are protected under the P.P.S., 2024 for industrial use. The Employment Area assessment is discussed in Chapter 9.

This chapter focuses on the Community Area land needs. The process begins by establishing the proportion of forecast housing growth to be accommodated within fully serviced settlement areas versus other settlement (i.e., Large Urban Centres and Serviced Villages). Once the housing growth allocated Large Urban Centres and Serviced Villages is determined, an additional assumption is made regarding the distribution of this growth within these Settlement Areas. This allocation is divided between growth to be accommodated within the B.U.A. and that which would be accommodated in Greenfield Areas. Accommodating growth in the Greenfield Area may necessitate the expansion of current settlement boundaries. As discussed in Chapter 2, Watson has reviewed its approach to land needs with the proposed P.M.G. document recently prepared by the province. Upon reviewing the proposed P.M.G. document, Watson has determined that the approach used for this study is consistent with its requirements.

Figure 8-1 illustrates the County's community structure components.

Figure 8-1
Oxford County
Community Structure



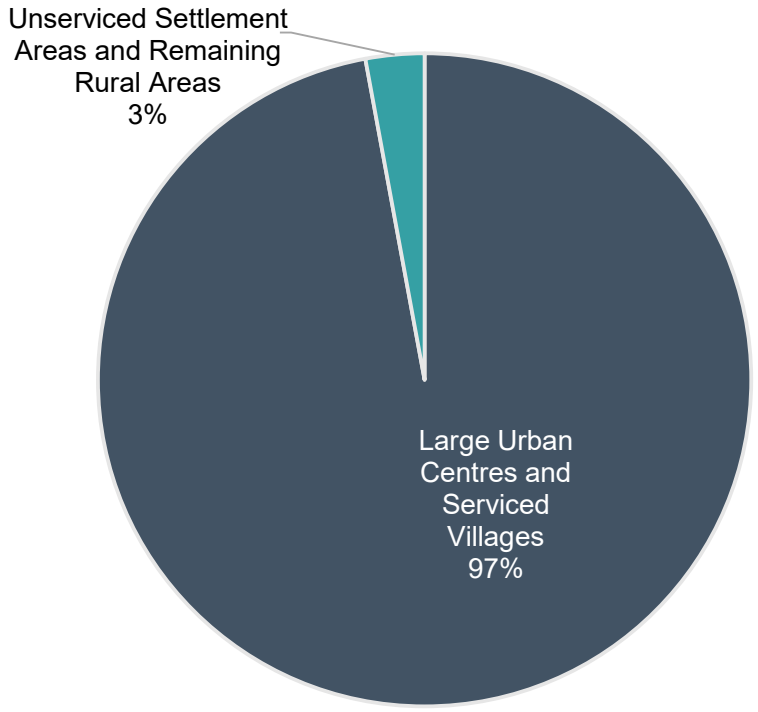
Source: Watson & Associates Economists Ltd.

8.3 Housing Growth Allocation

8.3.1 Housing Growth by Area – Large Urban Centres and Serviced Villages and Rural Settlements and Remaining/Rural Areas

Figure 8-2 summarizes housing growth, showing the breakdown between Large Urban Centres and Serviced Villages and Rural Settlement Areas and Remaining Rural Areas. As illustrated, approximately 97% of the housing is anticipated to be accommodated in the Large Urban Centres and Serviced Villages, while the remaining 3% is anticipated to be accommodated in the unserviced Rural Settlement Areas and Remaining Rural Areas. Housing growth in Villages, Rural Clusters and other Rural Areas is largely anticipated to be accommodated through severances, infill within existing Villages and Rural Clusters and Additional Residential Units.

Figure 8-2
Oxford County
Total Housing Unit Growth, 2024 to 2054



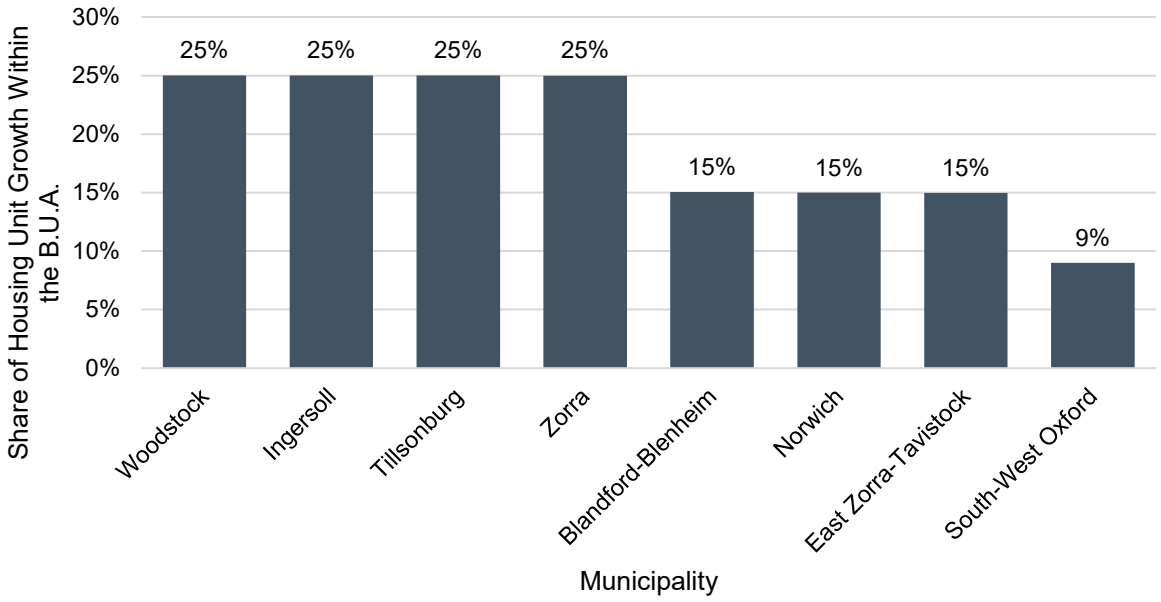
Note: Large Urban Centres and Serviced Villages are fully serviced settlement areas. For purposes of the L.N.A. prepared for this Study and P.P.S, 2024 are considered urban settlement areas.
Source: Watson & Associates Economists Ltd., 2025.

8.3.2 Housing Growth – B.U.A. and Greenfield Areas

As previously discussed, housing growth within the B.U.A. is classified as intensification. It is anticipated at a County-wide level that approximately 23% of new housing will be accommodated within the B.U.A. The forecast intensification rates vary by municipality, ranging from 9% to 25%, as shown in Figure 8-3. This allocation was determined by assessing both the supply and demand factors in each area. Key highlights are provided below.

- Large Urban Centres have been allocated a 25% intensification rate.
- Townships generally have an intensification rate of 15%, with two exceptions:
    - The Township of Zorra has a 25% allocation due to its significant intensification opportunities.
    - The Township of South-West Oxford has a 9% allocation, reflecting the limited supply available in its single serviced village of Mount Elgin.

Figure 8-3
Oxford County
Total Housing Unit Growth, 2024 to 2054



Source: Watson & Associates Economists Ltd., 2025.

While the B.U.A. accommodates intensification opportunities primarily, it is important to note that within the B.U.A.A there are still active subdivisions that provide opportunities

for low-density development. It is estimated that there is an opportunity to accommodate 1,750 low-density housing units (i.e., single and semi-detached housing units).

It is estimated that active applications in the County within the B.U.A. have the potential to accommodate approximately 5,760 housing units, which represents approximately 80% of the forecast housing units for the B.U.A. over a 30-year period. Overall, the identified housing supply potential within the B.U.A., which includes active applications and other opportunities, is projected to meet 96% of the long-term intensification housing demand. Beyond the current housing supply inventory, the County has the potential to accommodate more housing in the B.U.A. through Additional Residential Units and future redevelopment in the Large Urban Centres.

Over the past five years, the County has achieved a significant amount of growth within the B.U.A., largely due to the completion of subdivisions on large vacant tracts within the B.U.A. It is estimated that over the past five years, more than two-thirds of the housing growth has been accommodated within the B.U.A.[1] As the subdivisions within the B.U.A. complete the final phases, growth within the B.U.A. is to gradually shift towards a greater emphasis on medium and high-density housing forms. This anticipated shift is supported by a robust supply of available opportunities, which enables the County to accommodate a diverse range of housing and meet its intensification rate assumptions throughout the forecast horizon. Figure 8-4 provides a summary of the projected housing forecast within the B.U.A. for the 20, 25, and 30-year periods. At a County-wide level, the average annual housing forecast for the B.U.A. is 268 housing units per year over the 30-year period. The City of Woodstock is a significant contributor to this growth. As illustrated in the figure, Woodstock is expected to steadily increase its growth within the B.U.A. over the forecast period. The average annual housing growth is forecast to rise from 120 units per year over the 20-year period to 140 units per year over the 30-year period, indicating its growing role in meeting the County's housing needs, especially with higher-density housing forms.

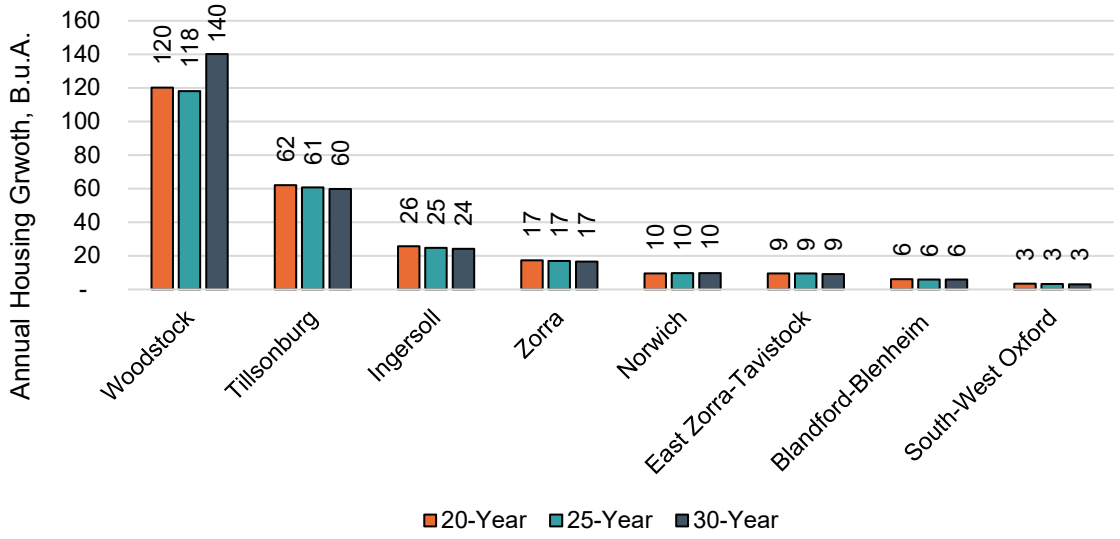
Woodstock, Ingersoll, and Tillsonburg are expected to accommodate 84% of the County's housing growth in the B.U.A. This high concentration of growth is due to the

[1] Based on Oxford County residential building permit activity that falls within the County's within the Built Boundary. Data was obtained from the County and covers a period of 2019 to 2023. It was observed that intensification rates for the large urban municipalities accommodated 72% of housing growth in the B.U.A., while the Townships accommodated 81% of the housing growth in the B.U.A.

wide range of amenities available in these Large Urban Centres, such as retail, services and transit. The demand for intensification is fueled by two demographic trends: an influx of younger adults and families seeking more affordable housing, and an aging population needing diverse, senior-friendly housing options.

The Townships are projected to accommodate a moderate level of intensification within their Serviced Villages, adding approximately 3 to 17 housing units per year in the B.U.A. Housing intensification in these areas is limited by a lack of suitable sites for intensification, and most of the intensification opportunities have been identified in the Large Urban Centres through the nodes and corridors review (see Chapter 6). As a result, Serviced Villages are expected to accommodate small-scale intensification, such as infill severances, new semi-detached, townhouse and apartment buildings on existing or new lots, and Additional Residential Units.

Figure 8-4
Oxford County
B.U.A.
Forecast Annual Housing Growth, 2024 to 2054



Source: Watson & Associates Economists Ltd., 2025.

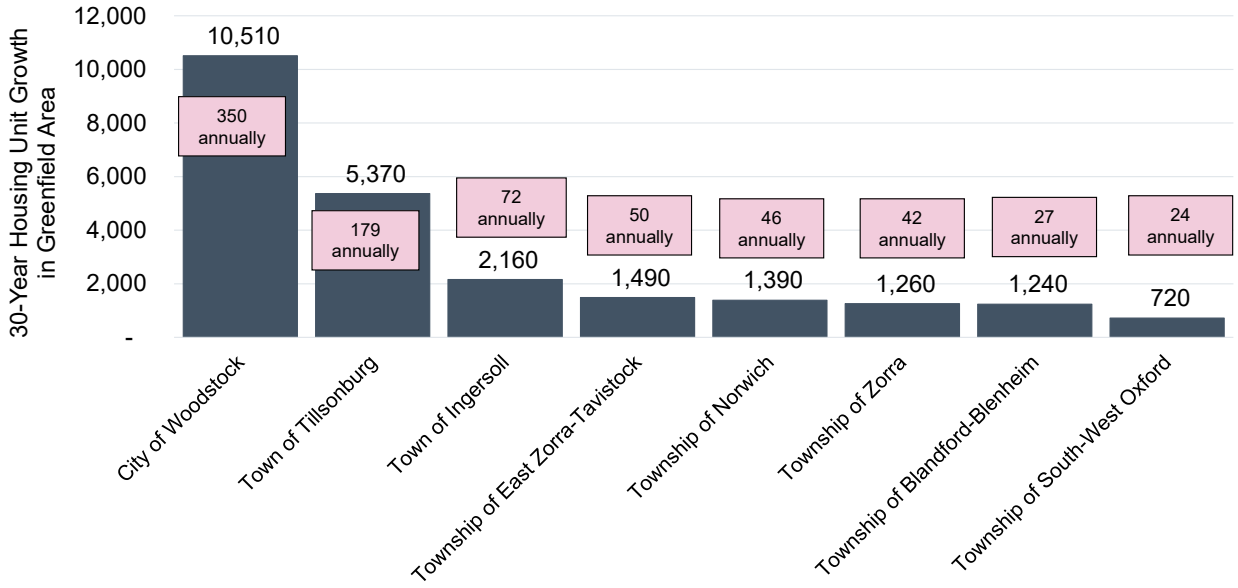
8.4 Housing Needs in Greenfield Areas

8.4.1 Greenfield Area Housing Growth Allocation

After forecasting housing growth from intensification and areas outside of fully-serviced settlements (i.e. Large Urban Centres and Serviced Villages), Figure 8-5 summarizes the remaining housing growth to be accommodated in Greenfield Areas over the 30-year period. Key highlights are provided below.

- Over the 30-year period, the County is anticipated to accommodate approximately 790 housing units annually in the Greenfield Areas. The City of Woodstock is anticipated to accommodate 44% of the housing growth within the County's Greenfield Areas.
- It is anticipated that Woodstock, Ingersoll, and Tillsonburg will collectively accommodate 600 housing units annually within their Greenfield Areas, representing 76% of the County's total growth. The remaining 24% of new housing units in the Country's Greenfield Areas are forecast for the Serviced Villages of the Townships.

Figure 8-5
Oxford County
Greenfield Areas
Forecast Housing Growth, 2024 to 2054



Source: Watson & Associates Economists Ltd., 2025.

8.4.2 Greenfield Area Housing Mix

Over the forecast period, it is anticipated that the County will be required to accommodate a wider range of housing options, driven by the increasing need for attainable and affordable housing associated with a growing population, including young adults, families and seniors. Current active development applications in the Greenfield Areas demonstrate a demand for diverse housing options, as listed below:

- Low-density housing (single-detached and semi-detached): 47%
- Medium Density housing (townhouses): 31%
- High-Density housing (apartments): 22%

Over the next 30 years, the forecast housing mix within the Greenfield Areas (outside of Built Boundary) includes the following mix listed below, recognizing the need for a range of housing options.

- Low-density housing (single detached and semi-detached): 61%
- Medium-density housing (townhouses): 21%

- High-Density housing (apartments): 18%

8.4.3 Greenfield Area Housing Needs

The 20-, 25- and 30-year forecasts for housing growth within the Greenfield Areas are compared against the supply opportunities within the Greenfield Areas. Appendix F provides details on the housing needs within the Greenfield Areas for the three periods. Figure 8-6 provides a summary of the housing needs within the Greenfield Areas over the 30-year period. Key highlights are provided below.

- Over the 30-year period, the County faces a total housing shortfall of approximately 14,260 units. Low-density housing represents the largest need, accounting for 67% of this shortfall, followed by medium-density units at 17% and high-density units at 16%.
- All municipalities have a shortfall of low-density housing units over the 30-year period to be accommodated on designated lands. In terms of other housing options, medium and high-density housing, some municipalities have surpluses.
- Although Blandford-Blenheim and Zorra face a shortfall of lands designated for residential use, it is important to note that the forecast housing need could be accommodated on lands designated Future Urban Growth (F.U.G.) in these Townships.[1] As the housing supply inventory is currently based on the potential of lands that have already been designated for growth, there will be a need to ensure that the future designation of lands within these F.U.G. areas is strategically planned to address this projected shortfall.
- Even with the potential for residential development on approximately 30 hectares of the F.U.G. lands in the Village of Norwich, Norwich would have a residential land need of 43 gross developable ha in the 30-year period.

[1] Within Blanford-Blenheim, Drumbo has approximately 11 hectares of F.U.G. Within Zorra, Embro has approximately 20 hectares of F.U.G.

Figure 8-6
Oxford County
Greenfield Areas
Housing Needs, 2024 to 2054 (30-Year)

Municipality	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units (Excludes Surpluses)
Woodstock	-4,260	-1,770	-1,700	-7,730
Tillsonburg	-2,280	-270	Surplus	-2,550
East Zorra-Tavistock	-900	-180	-120	-1,200
Norwich	-650	-180	-200	-1,030
Ingersoll	-650	Surplus	-200	-850
South-West Oxford	-310	-60	Sufficient	-370
Blandford-Blenheim	-130	Surplus	-70	-200
Zorra	-310	Surplus	-20	-330
Total Housing Shortfall in Greenfield Areas (Excludes Surpluses)	**-9,490**	**-2,460**	**-2,310**	**-14,260**

Note: Housing supply is considered sufficient when the difference between potential supply and forecast demand is within ±10 units. If the supply exceeds demand by more than 10 units, it is classified as a surplus.
Source: Watson & Associates Economists Ltd., 2025.

8.5 Community Area Land Needs

8.5.1 Greenfield Area Housing Density Assumptions

The shortfall of housing units is converted to net land area by applying an average units per hectare assumption by housing type. The average density assumption is based on trends observed within the County, as well as assumptions generated in land needs assessments for comparable municipalities across Ontario, including the Municipality of Chatham-Kent, City of Stratford and County of Middlesex. The residential density assumption is considered an average, recognizing that there may be variation by development. The County's larger urban centres – Woodstock, Ingersoll and Tillsonburg

have a higher density assumption than the County's Serviced Villages in the Townships. Below are the units per hectare assumptions provided:

- Woodstock, Ingersoll and Tillsonburg
    - Low Density (single-detached/semi-detached): 23 units per hectare
    - Medium Density (townhouses): 42 units per hectare
    - High Density (apartments): 80 units per hectare
- Serviced Villages in Townships:
    - Low Density (single-detached/semi-detached): 19 units per hectare
    - Medium Density (townhouses): 35 units per hectare
    - High Density (apartments): 50 units per hectare

Appendix F provides further details on the net land area requirement to accommodate Greenfield Area housing needs. This represents the additional land area needed to accommodate housing development; however, this land area excludes roads, stormwater ponds, parks/trails, and non-residential uses such as schools, community centres, and commercial uses. When planning for an outward expansion of the settlement boundary, it is important to factor in the additional uses required to support housing growth and the development of complete communities.

8.5.2 Community Area Net-to-Gross Assumption

Recognizing that planning for residential uses includes the need for infrastructure such as local roads, stormwater ponds, parks, trails, and select non-residential uses (e.g. schools, and commercial and institutional uses), Watson has upwardly adjusted the land area shortfall to account for additional land to accommodate these uses. Additional land is provided to account for other Community Area uses required to support the function of residential uses. This upward adjustment is referred to as a "net to gross ratio factor." Watson utilized two sets of "net to gross" assumptions based on the following:

- Woodstock, Ingersoll and Tillsonburg
    - An additional 45% of the land area is required for commercial and institutional uses, parks, roads and internal infrastructure. As a result, the residential lots would represent 55% of the land needs.
- Serviced Settlement Areas in Townships
    - An additional 40% of the land area is required for commercial and institutional uses, parks, roads and internal infrastructure. As a result, the residential lots would represent 60% of the land needs.

It is important to ensure that while housing development lots are getting smaller on average, the County accommodates an adequate amount of parkland and non-residential lands to support the development of complete communities. Figure 8-6 provides guidance on the breakdown of the gross developable land area. It is important to note that in planning for communities, there may be variation in the composition of urban land uses. As such, the breakdown provided in Figure 8-6 represents an average for the purposes of estimating the potential overall Community Area land need that is expected to be required to accommodate forecasted growth. The specific location, area, size and type of commercial and institutional land uses required and permitted with the Community Areas of each settlement area in the County would need to be determined through more detailed planning review/study (i.e. secondary planning, area studies, OPAs, etc.), taking into consideration such additional matters as retail market impacts and local land use policy direction for such uses.

Commercial and institutional uses identified in Figure 8-6 would include uses such as fire halls, community centres, schools, medical clinics, grocery stores, drug stores and a range of commercial services (e.g. restaurants, daycares, dry cleaners, nail and hair salons, banks, etc.). While these uses largely serve the local population, their reach may extend beyond the immediate area depending on the scale of the development. Moreover, depending on the scale and locational attributes of the new Community Area, and local land use policies/structure and retail market characteristics, commercial uses may also include certain comparison-based retail uses, such as apparel, new automotive sales, furniture, electronics, sporting goods and general merchandise (e.g. Marshall's, HomeSense, Giant Tiger, etc.). Since these retailers rely on infrequent, high-value purchases, they need to be in key commercial areas that can attract a large customer base from a broad regional population.

As summarized, approximately 30% of the gross developable land area is anticipated to comprise local roads, infrastructure (e.g. stormwater ponds) and parkland. Approximately 15% of the gross developable land in the Community Area of Large Urban Centres of Woodstock, Ingersoll, and Tillsonburg is expected to be required for commercial and institutional uses.

This represents a higher allocation than the 10% anticipated for Serviced Villages within the Townships. This difference in land allocation is a direct reflection of the distinct roles of these communities and the scale of the new Community Areas. The Large Urban Centres typically accommodate a broader range of commercial and institutional

services, such as major retail, healthcare facilities, and specialized services that support residents beyond the local area. In contrast, Serviced Villages typically require less land to provide localized services that cater to the daily needs of their smaller populations.

New Community Areas in Serviced Villages will likely depend primarily on and integrate with the existing commercial and institutional uses/areas, rather than the development of new uses/areas.

Figure 8-7
Oxford County
Gross Developable Land Area Components

Municipality	Woodstock, Ingersoll and Tillsonburg	Townships
Residential	55%	60%
Local Roads, Infrastructure and Parkland	30%	30%
Commercial and Institutional Uses	15%	10%
Total	100%	100%

Source: Watson & Associates Economists Ltd., 2025.

8.5.3 Community Area Land Requirements

Figure 8-8 provides a summary of the Community Area land requirements by municipality over the 20-, 25- and 30-year periods. As summarized, it is estimated that the County requires an additional 390 gross developable hectares of Community Area lands over the 20-year period, increasing to approximately 822 hectares gross developable (approximately 2,030 acres) over the 30-year period. Six of the eight municipalities within the County will require settlement expansions to accommodate Community Area uses, such as housing and supporting uses, like parkland, commercial and institutional uses. Appendix F provides further details on the Community Area land requirements.

Figure 8-8
Oxford County
Greenfield Areas
Community Area Land Requirements

Municipality	20-Year Land Needs	25-Year Land Needs	30-Year Land Needs
City of Woodstock	-251	-353	-452
Town of Tillsonburg	-64	-119	-170
Township of East Zorra-Tavistock	-53	-72	-91
Township of Norwich	-9	-26	-43
Town of Ingersoll	-2	-20	-36
Township of South-West Oxford	-11	-21	-30
Township of Blandford-Blenheim	Surplus	Surplus	Surplus
Township of Zorra	Surplus	Sufficient	Sufficient
Oxford County Total (excludes surpluses)	**-390**	**-611**	-822

Note: Land supply is considered sufficient when the difference between the potential housing unit supply on vacant lands and the housing forecast demand is within ±10 housing units. If the supply exceeds demand by more than 10 units, it is classified as a surplus.
Source: Watson & Associates Economists Ltd., 2025.

Figure 8-9 summarizes the land requirements for the Community Area over a 30-year period, broken down by municipality. The figure illustrates the land needed for residential, commercial/institutional uses, and local infrastructure. A complete table with the 20-, 25- and 30-year periods is provided in Appendix F. In the following section, a more detailed review is conducted to understand the commercial and institutional land requirements based on an analysis of existing designated land. This review will determine if additional commercial and institutional land is required in addition to the land identified in Figure 8-9.

Figure 8-9
Oxford County
Greenfield Areas
Community Area Land Requirements by
Developable Land Component – 30-Year Period

Developable Land Component	Woodstock	Tillsonburg	East Zorra-Tavistock	Norwich	Ingersoll	South-West Oxford	Total
Residential	249	94	55	26	20	18	460
Commercial and Institutional	67	25	9	4	5	3	114
Local Roads, Infrastructure and Parkland	136	51	27	13	11	9	248
Total	**452**	**170**	**91**	**43**	**36**	**30**	**822**
Residential (%)	**55%**	**55%**	**60%**	**60%**	**55%**	**60%**	**56%**
Commercial and Institutional (%)	**15%**	**15%**	**10%**	**10%**	**15%**	**10%**	**14%**
Local Roads, Infrastructure and Parkland (%)	**30%**	**30%**	**30%**	**30%**	**30%**	**30%**	**30%**

Source: Watson & Associates Economists Ltd., 2025.

8.5.4 Review of Commercial and Institutional Land Requirements

As previously outlined, the Community Area land needs assessment includes a provision for institutional and commercial uses to support the new residential base in additional Community Areas that are established as part of a settlement area expansion. This analysis is limited to these new Community Areas and does not account for the commercial and institutional requirements of the existing population base or of Community Areas that are already designated. As a result, allocating 10% to 15% of the gross developable land area identified for Community Area expansion for commercial and institutional uses may fall short of meeting all of the municipality's forecast population-related employment needs.

A high-level assessment of commercial and institutional land needs has been conducted to estimate the approximate amount of designated settlement area land required to support future growth. This evaluation considers both the County's inventory of vacant designated lands, an assumption on growth to be accommodated through intensification and in residential areas, as well as the provision of land for these uses on Community Area expansion lands.

It is important to note that a review has not been conducted on the existing vacant commercial and institutional land supply to determine whether these lands are appropriately located to meet the commercial and institutional needs of all areas within the community. This includes assessing whether the current supply can accommodate specific uses in terms of land area, servicing, access, proximity to other land uses, and location within Employment Areas. Therefore, the need for additional lands to support commercial and institutional uses and achieve broader planning objectives such as creating complete communities, supporting transit and multi-modal transportation, and defining strategic growth areas should be evaluated through more detailed analysis. This review may occur through Secondary Plans to support future settlement expansions, updates to the County's Commercial Policy Review study, retail market impact studies, and other supporting studies.

The following provides a high-level assessment of commercial and institutional needs by municipality. Key assumptions and highlights are provided below.

Demand

- It is assumed that at least **25% of the commercial and institutional employment will be accommodated through intensification or in existing facilities.** This includes the expansion of existing facilities, the development of new buildings on existing sites, the development on infill sites and the redevelopment of existing lands. This assumption also recognizes that additional employment may be accommodated in existing facilities without the need for building expansion, such as hospitals, offices, nursing homes, retail stores and government facilities.
- As summarized in Figure 8-10, it is anticipated that the County will accommodate approximately 10,300 employees (column C) in commercial and institutional sectors, which will need to be accommodated on vacant lands in the Large Urban Centres and Serviced Villages over the 30-year period. This has been downwardly adjusted to reflect the assumption that 25% of the commercial and institutional employment will be accommodated through intensification and not require additional land.
- Based on an employment density of an average of 55 jobs per net hectare for Serviced Villages and 60 per jobs per net hectare for Large Urban Centres (column D), it is estimated that commercial and institutional employment will generate a demand of 174 net hectares (approximately 432 acres) in the County over the 30-year period in the Large Urban Centres and Serviced Villages (column G). A higher employment density was utilized for the Large Urban Centres to recognize the opportunities for more office uses; these uses are characterized by a greater density than retail uses.
- The majority of the commercial and institutional land demand in the County is concentrated in the Large Urban Centres of Woodstock, Ingersoll and Tillsonburg. Over the 30-year period, the Serviced Villages in the Townships will collectivity require 18 net hectares (approximately 44 acres) of designated commercial and institutional lands to accommodate commercial and institutional employment growth.

Figure 8-10
Oxford County
Commercial and Institutional Employment Land Demand, 2024 to 2054

Municipality	Adjusted for Intensification Employment 20-Year	Adjusted for Intensification Employment 25-Year	Adjusted for Intensification Employment 30-Year	Employment Density (jobs/net hectares)	Land Demand, 20-Year (Hectares)	Land Demand, 25-Year (Hectares)	Land Demand, 30-Year (Hectares)
-	A	B	C	D	E = A / D	F = B / D	G = C / D
Woodstock	4,010	4,820	5,620	60	67	80	94
Tillsonburg	1,830	2,200	2,560	60	31	37	43
Ingersoll	820	980	1,140	60	14	16	19
Norwich	140	170	190	55	3	3	3
East Zorra-Tavistock	250	290	350	55	5	5	6
Zorra	200	250	290	55	4	5	5
Blandford-Blenheim	70	80	100	55	1	1	2
South-West Oxford	60	80	80	55	1	1	1
Total	**7,380**	**8,870**	**10,330**	**55**	**124**	**149**	**174**

Notes: Adjusted for intensification, based on 35% of employment growth to be accommodated through intensification. The figure has been rounded and may not add up precisely when comparing it with other figures.
Source: Watson & Associates Economists Ltd., 2025.

Supply of Designated Commercial and Institutional Lands

- The County has carried out an inventory of vacant designated commercial and institutional lands across the County within the County's Serviced Villages and Large Urban Centres. The designated vacant land supply totals approximately 101 net hectares (approximately 250 acres), as previously discussed in Chapter 7. A summary of the existing designated land supply is provided in Figure 8-11, column A.
- It is anticipated that approximately 119 net hectares (approximately 294 acres) of commercial and institutional land is included in the net-to-gross adjustment for Community Area land needs across the County over the 30-year period as identified in Figure 8-11 in Column D. As previously discussed, this is based on 10% (in Serviced Villages in Townships) to 15% (in Large Urban Centres) of the gross developable land area of Community Area land need being assumed for commercial and institutional uses (refer to Figure 8-9).
- Considering the current supply of designated commercial and institutional land and the amount of commercial and institutional land needed to support residential growth in the Community Area, the County is estimated to have a potential of 220 hectares (approximately 544 acres) of commercial and institutional land over the 30-year period (Figure 8-11, column G).

Figure 8-11
Oxford County
Commercial and Institutional Employment Land Opportunities, Hectares

Municipality	Vacant Designated Commercial and Institutional Land Supply	Commercial and Institutional Lands to Support Residential Expansion, 20-Year	Commercial and Institutional Lands to Support Residential Expansion, 25-Year	Commercial and Institutional Lands to Support Residential Expansion, 30-Year	Total Land Potential: 20-Year	Total Land Potential: 25-Year	Total Land Potential: Total 30-Year
-	A	B	C	D	E = A + B	F = A + C	G = A + D
Woodstock	54	37	52	67	91	106	121
Tillsonburg	8	10	18	25	18	26	33
Ingersoll	17	0	3	5	17	20	22
Zorra	17	0	0	0	17	17	17
Norwich	1	4	5	7	5	6	8
East Zorra-Tavistock	1	5	7	9	6	8	10
Blandford-Blenheim	3	1	2	3	4	5	6
South-West Oxford	-	1	2	3	1	2	3
Total	**101**	**58**	**89**	**119**	**159**	**190**	**220**

Note: The figure has been rounded and may not add up precisely when comparing it with other figures.
Source: Watson & Associates Economists Ltd., 2025.

Commercial and Institutional Land Need

- Based on the comparison of land supply opportunities relative to projected demand (comparing Figure 8-10 column G with Figure 8-11 Column G), it is anticipated that most municipalities will have more than enough designated land to accommodate growth, particularly when factoring in the potential contributions from Community Area land expansions to support residential needs.
- Tillsonburg, however, is the exception. The municipality is not expected to meet its designated commercial and institutional land requirements through the Community Area expansion identified in subsection 8.5.3 and will therefore require additional Community Area lands beyond those currently identified. As a result, an additional 10 hectares (approximately 25 acres) of Community Area lands would be required for Tillsonburg for commercial and institutional purposes over the 30-year period.[1] In total, Tillsonburg would require approximately 180 hectares (approximately 445 acres) of land for Community Area expansion as summarized in Figure 8-12.[2]
- It is important to note that a review has not been carried out of the vacant commercial and institutional lands to assess marketability. Furthermore, it is unknown whether there are gaps in the existing commercial base by category (e.g. food stores, commercial services, etc.) and by municipality. Often when municipalities have undergone significant recent population growth, the commercial base has not caught up with the needs of residents and may take several years to catch up. Finally, the estimates on the portion of the Community Area lands presented in sub-section 8.5.3 for commercial and institutional purposes is conceptual and further work may be required in planning for the Community Area expansion lands to determine the approximate land base for commercial and institutional uses, factoring site attributes and surrounding context.

[1] Based on the land potential for commercial and institutional at 33 hectares over the 30-year period (Figure 8-11), however, the demand is 40.4 hectares (Figure 8-10). As a result, 33 hectares – 43 hectares = approximately 10 hectares. Note that all Figures have been rounded.

[2] Based on the Community Area needs of commercial and institutional land to support residential expansion of 170 hectares (Figure 8-6), plus an additional 10 hectares of additional lands for commercial and institutional uses (Figure 8-11). The 170-hectare expansion is insufficient to meet the Community Area's existing shortfall of commercial and institutional land within its current settlement boundaries.

Figure 8-12
Oxford County
Adjusted Community Land Needs Based on Commercial and Institutional Land Review, 2024 to 2054, Hectares

Community Area Expansion - Developable Land Component	Tillsonburg	Adjusted Tillsonburg	Difference
Residential	94	94	0
Commercial and Institutional	25	35	+10
Local Roads, Infrastructure and Parkland	51	51	0
Total	**170**	**180**	**+10**

Source: Watson & Associates Economists Ltd., 2025.

8.6 Observations

Over the forecast horizon, the County is anticipated to accommodate a range of housing options in the B.U.A. and Greenfield Areas. Historically, the County has achieved a significant amount of growth within the B.U.A., largely due to the completion of subdivisions on large vacant tracts within the B.U.A. It is estimated that over the past five years, more than two-thirds of the housing growth has been accommodated within the B.U.A.[1] As the subdivisions within the B.U.A. complete the final phases, growth within the B.U.A. is anticipated to gradually shift towards medium and high-density housing forms. This anticipated shift is supported by a robust supply of available opportunities, which enables the County to accommodate a diverse range of housing and meet its intensification rate assumptions throughout the forecast horizon. Emphasizing these residential intensification opportunities is important as the County is experiencing a notable influx of younger adults and families migrating from other parts of Southern Ontario, primarily drawn by more attainable ownership and rental housing

[1] Based on Oxford County residential building permit activity that falls within the County's within the Built Boundary. Data was obtained from the County and covers a period of 2019 to 2023. It was observed that intensification rates for the large urban municipalities accommodated 72% of housing growth in the B.U.A., while the Townships accommodated 81% of the housing growth in the B.U.A.

options in the County. At the same time, the County's population is aging, which creates a growing need for diverse housing options, including senior-friendly housing and smaller housing units.

The recommended intensification rates vary by municipality, ranging from 9% to 25%. This allocation was determined by assessing both the supply and demand factors in each area. Key highlights are provided below.

- Large Municipalities have been allocated a 25% intensification rate.
- Townships generally are forecast with an intensification rate of 15%, with two exceptions:
    - The Township of Zorra has a 25% allocation due to its significant intensification opportunities within existing approved developments.
    - The Township of South-West Oxford has a 9% allocation, reflecting the limited supply available in its single serviced village of Mount Elgin.

It is estimated that the County requires an additional 390 hectares of Community Area lands over the 20-year period, increasing to approximately 819 hectares (approximately 2,020 acres) over the 30-year period. Seven of the eight municipalities within the County will require a settlement expansion to accommodate Community Area uses, such as housing and supporting uses, such as parkland, commercial and institutional uses. Appendix F provides further details on the Community Area land requirements.

Based on a review of the commercial and institutional land requirements, the Town of Tillsonburg, will require an additional 10 hectares (25 acres) of Community Area lands for commercial and institutional purposes over the 30-year period. In total, Tillsonburg would require approximately 180 hectares (445 acres) of land for Community Area expansion. All the remaining municipalities will meet their land requirement for commercial and institutional uses through the existing designated land supply, as well as through the provision for commercial and institutional uses to support Community Area expansion for the identified shortfall of housing in the Greenfield Areas.

Chapter 9
Employment Area Land Needs

9. Employment Area Land Needs

9.1 Introduction

As previously discussed, Employment Areas are planned to accommodate industrial-type development that requires separation for sensitive uses, such as residential and major retail uses. These areas are protected under the P.P.S., 2024 for industrial use. This Chapter explores the long-term need for additional designated lands to support Employment Area uses within the Large Urban Centres and the Serviced Villages.

9.2 Approach

The Employment Area lands include all lands in the County's O.P. that are designated for industrial uses, including industrial, business park and traditional industrial land use designations. The demand for these lands is directly tied to provincial planning direction (P.P.S., 2024), which requires the County to accommodate uses that meet the province's definition of an Employment Area.

Chapter 7 provides a summary of the vacant Employment Area land supply utilized in the Employment Area land needs assessment, while Appendix G provides further details on the Employment Area land needs assessment.

9.3 Employment Growth Allocation

The employment growth forecast has been distributed across four categories, with the last three primarily representing industrial-related employment.

- **Community Area:** Includes a range of uses that support the population base, including commercial and institutional employment, as well as work at home employment. These uses were previously discussed in the section 8.5.4. Employment growth in this category represents 61% of the employment growth over the 30-year period.
- **Employment Area:** Industrial-type uses accommodated within the Large Urban Centres and Serviced Villages. This primarily includes industrial uses that require municipal servicing (water/wastewater servicing); however, within the Serviced Villages this may include dry industrial uses where appropriate. Forecast

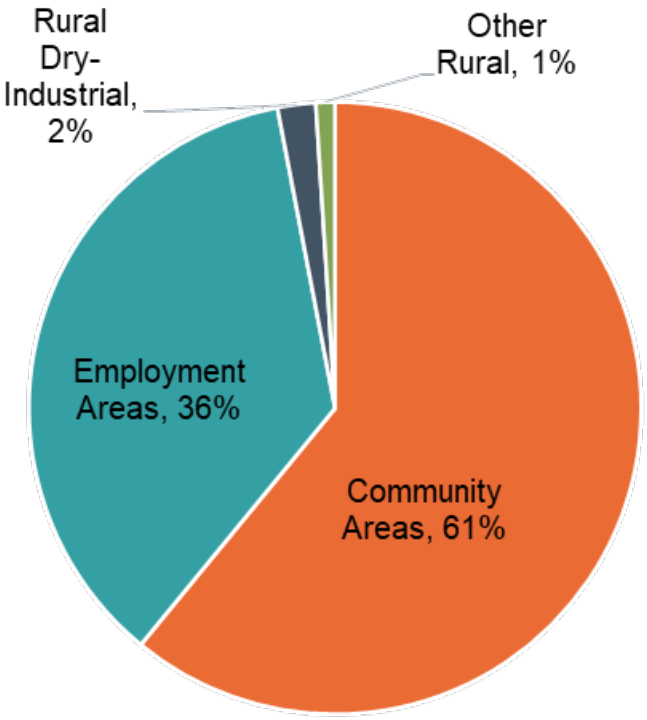
employment demand within this category has been assessed as part of Employment Area land needs assessment and is a key focus of this Chapter. Approximately 2% of the forecast includes commercial uses expected to be located within Employment Areas. These uses would primarily consist of commercial employment activities accommodated in industrial-style buildings. Employment Area growth represents 36% of the County's employment growth over the 30-year period.

- **Rural Dry-Industrial Uses:** Industrial uses in unserviced settlement areas and rural areas that do not require municipal servicing. A land absorption forecast has been provided in this report to provide guidance on the level of growth that can be anticipated through dry industrial uses. The rural dry industrial land absorption forecast is provided in section 9.6, while a further discussion of planning for dry industrial uses in the rural area is provided in Chapter 10. Rural dry industrial employment represents 2% of the County's employment growth over the 30-year period.
- **Remaining Rural:** Other industrial uses in the rural area that support the agricultural sector and the broader rural-based economy. A further discussion of planning for dry industrial uses in the rural area is provided in Chapter 10. Remaining rural employment represents 1% of the County's employment growth over the 30-year period.

The above categories provide the County with a framework for planning future employment growth in a way that balances development needs with the protection of agricultural lands. This approach accommodates a broad range of land uses, including those that may not require full municipal servicing, even within Serviced Villages. Providing this flexibility is critical to meeting evolving economic demands, attracting diverse business opportunities, and supporting the rural economy while safeguarding the agricultural base that underpins the County's long-term prosperity.

Figure 9-1 provide a summary of the growth allocation by category over a 30-year period, as previously discussed. Appendix D (Figures D-20a, D-20b and D-20c) provides further details on the employment forecast breakdown within the Townships by Employment Area (Serviced Villages), Rural Dry-Industrial Uses and Remaining Rural over the 20-, 25- and 30-year periods.

Figure 9-1
Oxford County
Employment Growth Allocation by Category, 2024 to 2054



Source: Watson & Associates Economists Ltd., 2025

9.4 Employment Growth Allocation to Employment Areas

Figure 9-2 summarizes the County's employment forecast in Employment Areas (i.e. industrial jobs and ancillary uses) by municipality. Within the Townships, Employment Areas include lands designated for industrial uses in the Serviced Villages (as previously discussed in section 9.3). Key assumptions and highlights are discussed below.

- Woodstock and Ingersoll both have a higher concentration of the County's existing industrial jobs at 46% and 20% as of 2024, respectively. As a result, a large portion of the County's Employment Area growth is anticipated in these two Large Urban Centres.
- Woodstock was the only municipality to see positive industrial growth over the 2006 to 2011 economic downturn. While other municipalities experienced a decline, most municipalities are now recovering, with their industrial employment

levels recently returning to 2006 figures. This recovery signals renewed momentum and potential for growth.

- All municipalities in the County are expected to accommodate strong growth in their Employment Areas over the next 30 years. Woodstock is projected to increase its share of this growth, while Ingersoll is expected to maintain its current share
- Annually over the 30-year horizon, it is anticipated that Woodstock and Ingersoll will add 275 and 100 new jobs respectively within Employment Areas. Tillsonburg is expected to add 60 new jobs each year in its Employment Areas, while the Serviced Villages within the Townships are each forecast to add between 4 to 8 new jobs annually.
- Growth in Employment Areas is anticipated to accommodate the manufacturing, wholesale, logistics, and construction sectors. Within the large urban centres and, to a lesser extent, within the Serviced Villages, growth is expected to also include opportunities for integrated uses, such as office and retail uses, as ancillary uses.
- Factors which contribute to Woodstock and Ingersoll having a higher total Employment Area job growth over the long-term include direct access to Highway 401/403 and closer connectivity to the City of London and the G.G.H.
- Overall, the County is expected to accommodate 14,200 jobs over the 30 years in the County's Employment Areas.
- As illustrated in Figure 9-2, an adjustment has been made to account for an estimated amount of Employment Area growth to be accommodated through intensification. Intensification in Employment Areas may include expansion of existing facilities, adding additional buildings on existing sites and redevelopment of developed lands.
- It is assumed that 10% of employment growth in Woodstock, Ingersoll, and Tillsonburg will be accommodated through intensification, while a lower share of 5% is assumed for the serviced settlement areas in the Townships, acknowledging their smaller developed Employment Area base.
- Adjusted for intensification, the County is anticipated to accommodate 12,490 jobs in Employment Areas over the next 30 years.

Figure 9-2
Oxford County
Employment Area Forecast

Municipality	Employment			Employment Adjusted for Intensification		
	2024-2044	2024-2049	2024-2054	2024-2044	2024-2049	2024-2054
Woodstock	6,020	7,160	8,250	5,420	6,440	7,430
Tillsonburg	1,340	1,600	1,840	1,210	1,440	1,660
Ingersoll	2,170	2,590	2,980	1,950	2,330	2,680
Zorra	90	110	120	90	100	110
Norwich	160	190	215	150	180	200
East Zorra-Tavistock	150	170	200	140	160	190
Blandford-Blenheim	90	110	120	90	100	110
South-West Oxford	80	90	120	80	90	110
Total	10,100	12,020	13,845	9,130	10,840	12,490

Source: Watson & Associates Economists Ltd., 2025.

9.5 Employment Area Land Needs

Figure 9-3 provides a summary of the Employment Area land demand forecast by Area Municipality. An average Employment Area density of 15 jobs per net hectare is utilized for Woodstock, Tillsonburg and Ingersoll, while an Employment Area density of 7 to 10 jobs per net hectare is utilized for most of the Serviced Villages in the Townships. However, it is noted by County Staff that the type and capacity of the water/wastewater system in each of the Serviced Villages varies and some may have certain development limitations due to overall capacity constraints, the type of effluent that can be treated, the method/distance of conveyance, water pressure/fire rating, etc. The variance in density reflects the level of dry industrial uses that are likely to be accommodated within the Serviced Villages. It is important to note that a separate land demand forecast is provided in section 9.6 for rural dry-industrial uses (outside of Serviced Villages) within the Townships.

A higher density is assumed in the Large Urban Centres, given that these areas are expected to attract denser, more intensive industries with full municipal services (like advanced manufacturing). Based on the assessment, the demand for Employment Area land is anticipated to reach 638 hectares over the next 20 years, increasing to 871 hectares over a 30-year period. The three Large Urban Centres are expected to

accommodate 90% of the land demand over the next 30-years, while the Township's Serviced Villages accommodating the remaining 10%.

Figure 9-3
Oxford County
Employment Area Land Demand

Municipality	Employment Adjusted for Intensification			Density (jobs/Net ha)	Land Demand		
	2024-2044	2024-2049	2024-2054		2024-2044	2024-2049	2024-2054
Woodstock	5,420	6,440	7,430	15	361	429	495
Tillsonburg	1,210	1,440	1,660	15	81	96	111
Ingersoll	1,950	2,330	2,680	15	130	155	179
Zorra	90	100	110	7	13	14	16
Norwich	150	180	200	10	15	18	20
East Zorra-Tavistock	140	160	190	10	14	16	19
Blandford-Blenheim	90	100	110	7	13	14	16
South-West Oxford	80	90	110	7	11	13	16
Total	9,130	10,840	12,490	-	638	756	871

Source: Watson & Associates Economists Ltd., 2025.

Figure 9-4 provides a summary of the Employment Area land needs by Area Municipality. The Employment Area land demand is compared to the Employment Area supply to determine the Employment Area land needs. The land needs are then adjusted downward to account for Future Urban Growth Areas that were not included in the previous designated supply. Chapter 7 provides a summary of the designated land supply. Key highlights include the following:

- Overall, the County is anticipated to require an additional 129 gross developable hectares of designated Employment Areas land over the 20-year period. Over the 30-year period, this is expected to increase to 353 hectares.
- Five of the eight municipalities will require additional designated Employment Area lands over the 25-year and 30-year period. There is small shortfall over the 30-year period in Blandford-Blenheim. Given the size of the shortfall, it is recommended that the Township and County monitor and review the needs upon the next O.P.R. The majority of the additional Employment Area land needs is concentrated in the City of Woodstock and the Town of Tillsonburg. However, it is noted that the remaining lands (436 gross developable ha) within the City of Woodstock corporate boundary that have been identified for Employment Area purposes through Secondary Planning are sufficient to address the City of

Woodstock's Employment Area land need, at such time as they are redesignated for Settlement Area, Industrial purposes. No additional Employment Area land is required in the Town of Ingersoll and the Township of Zorra.

Figure 9-4
Oxford County
Employment Area Land Needs

Municipality	Land Needs, Net Hectares			Land Needs, Gross Developable, Hectares			F.U.G./ Secondary Plan Areas	20-Year Land Needs Gross Developable (ha)	25-Year Land Needs Gross Developable (ha)	30-Year Land Needs Gross Developable (ha)
	2024-2044	2024-2049	2024-2054	2024-2044	2024-2049	2024-2054				
Woodstock [1]	-70	-138	-204	-87	-172	-255	4	-83	-168	-251
Tillsonburg	-24	-39	-54	-30	-49	-68	0	-30	-49	-68
Ingersoll	55	30	6	69	37	8	0	Surplus	Surplus	Surplus
Zorra	-12	-14	-15	-15	-17	-19	24	Surplus	Surplus	Surplus
Norwich	1	-2	-4	1	-3	-5	0	Surplus	-3	-5
East Zorra-Tavistock	-12	-14	-17	-14	-17	-21	0	-14	-17	-21
Blandford-Blenheim	1	-0	-2	2	-0	-2	0	Surplus	0	-2
South-West Oxford	-1	-2	-5	-1	-3	-6	0	-1	-3	-6
Total	**-**	**-**	**-**	**-**	**-**	**-**	**28**	**-129**	**-240**	**-353**

[1] There are lands outside of the settlement boundary that have been identified for industrial use through the Southeast Woodstock Secondary Plan. These lands were not included in the employment land supply as they still require re-designation at such time as the lands are required and serviceable, but would be first priority for any future settlement area boundary expansion for employment uses.
Source: Watson & Associates Economists Ltd., 2025.

9.6 Rural Dry-Industrial Land Absorption Forecast

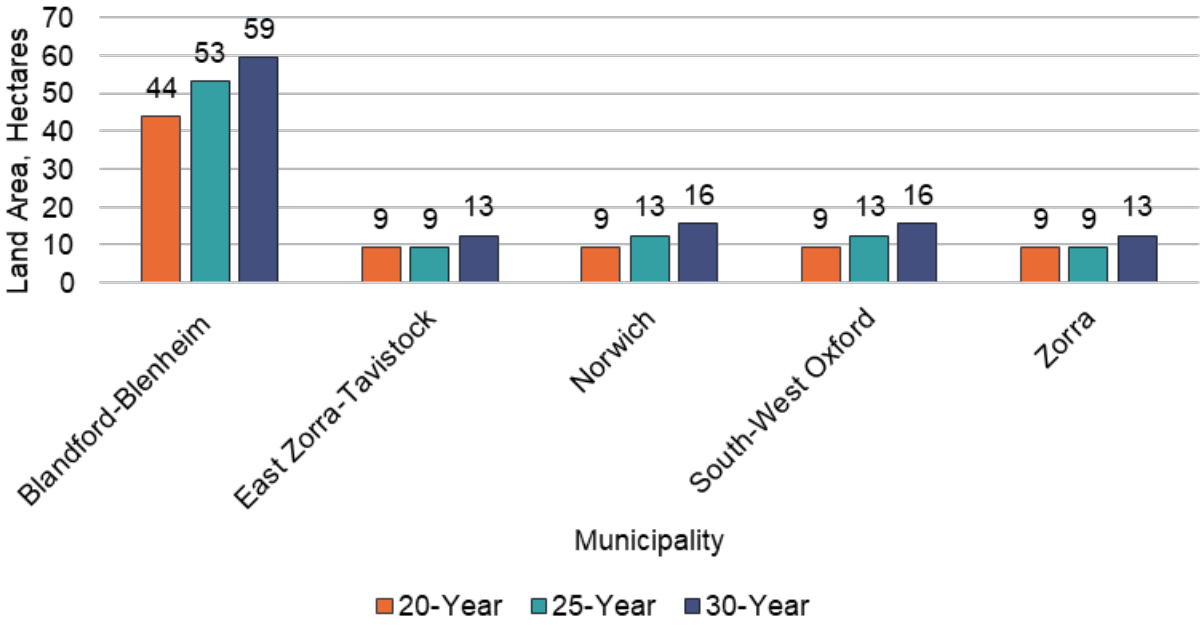
Dry industrial employment refers to operations that use minimal water and generate limited liquid waste, making them suitable for rural and unserviced settlement areas. Typical examples include welding and metal fabrication shops, agricultural support services such as farm equipment sales and repair or feed mills, small-scale manufacturing for custom metalwork, furniture, or agricultural equipment, as well as warehousing and distribution facilities for goods like agricultural products or construction materials. Contractor yards serving trades such as construction, landscaping, electrical, and plumbing also fall within this category. These uses play an important role in supporting the agricultural sector and the broader rural economy. Figure 9-6 summarizes the forecast for rural land absorption and illustrates how this growth is expected to be distributed across the County. The purpose of this forecast is to guide the County in determining the appropriate amount of land to allocate for dry industrial uses to meet future economic needs while maintaining flexibility for rural development.

Key highlights of Figure 9-5 by Area Municipality include:

- Over the next 30 years, Oxford County is forecast to absorb approximately 117 hectares of rural dry industrial land. This translates to an average annual absorption of approximately 4 hectares per year across the County. Based on an assumption of 4 jobs per net hectare, this level of land absorption supports an estimated 470 jobs.
- Blandford-Blenheim accounts for the largest share, with 59 hectares, representing roughly 50% of the total rural dry-industrial forecast. This represents an annual average of 2 hectares per year and an employment equivalent of 240 jobs. The concentration of growth in Blandford-Blenheim is due to good transportation access and limited Employment Area options within the Serviced Villages.
- In contrast, other municipalities show modest absorption levels, ranging from 13 to 16 hectares over the 30-year period. Specifically:
    - East Zorra-Tavistock is forecast to absorb 13 hectares, averaging 0.4 hectares per year, supporting approximately 50 jobs.
    - Norwich is projected to absorb 16 hectares, averaging 0.5 hectares per year, with an employment equivalent of 60 jobs.

- South-West Oxford mirrors Norwich with 16 hectares, 0.5 hectares annually, and 60 jobs.
- Zorra is expected to absorb 13 hectares, averaging 0.4 hectares per year, supporting 50 jobs.

Figure 9-5
Oxford County
Rural Dry-Industrial Land Absorption



Source: Watson & Associates Economists Ltd., 2025.

Appendix G, Figures G-5a, G-5b and G-5c provide further details on the rural dry-industrial land absorption forecast.

9.7 Observations

Employment areas are a vital component of a municipality's economic base. By providing a stable and designated location for a wide range of businesses, these areas form the backbone of the local economy and are crucial for generating jobs and economic opportunities for the County. Over the next 30 years, the County's Employment Areas in the Large Urban Centres and Serviced Villages are expected to

accommodate robust growth, representing approximately 39% of the County's employment growth.

Five of the eight municipalities will require additional designated Employment Area lands over the 20-, 25-, and 30-year periods. The majority of the additional Employment Area land needs are concentrated in the City of Woodstock and the Town of Tillsonburg. No additional Employment Area land is required in the Town of Ingersoll and the Township of Zorra. The Township of Blanford-Blenheim has a small shortage of 2 hectares over the 30-year period, the County and Township should review this land needs at the next O.P.R.

Overall, the County is anticipated to require an additional 129 gross developable hectares of designated Employment Areas land over the 20-year period. Over the 30-year period, this is expected to increase to 353 hectares.

In addition, to expansion requirements for Employment Areas in the Serviced Villages and Large Urban Centres, Oxford County is forecast to absorb approximately 117 hectares of rural dry-industrial land. The County should continue to monitor the dry industrial needs.

Chapter 10
Policy Considerations

10. Policy Considerations

10.1 Introduction

Over the next several decades, Oxford County is anticipated to accommodate steady population and employment growth. As Oxford County continues to grow, mature, and evolve, a broader range of new housing options will be required, with a greater share of new housing development occurring across a range of grade-related and high-density housing forms. To accommodate future residents in Oxford County, there is also an increasing need to develop new and innovative approaches to housing development within established and new communities that are pedestrian-oriented and transit-supportive, where appropriate. This includes options that provide greater opportunities for mixed-use development planned within intensification nodes and corridors, including secondary suites, live/work units, and a range of attainable and affordable housing opportunities.

The County's employment base is also anticipated to steadily grow across a broad range of export-based and population-serving employment sectors. It is important to recognize that the County competes to attract and retain jobs and business investment with other surrounding municipalities within the London Economic Region and beyond. To ensure its long-term competitiveness across a diversifying employment base, planning and marketing efforts must be geared toward both the broader strengths of the County and specific target sector investment attraction efforts. To accommodate the steadily growing economic base within Oxford County, land use planning policies must anticipate the evolving nature of the local and regional economy and reflect the changing needs of industry and businesses of all sizes over the long term. These policies must also offer a degree of flexibility and nimbleness that allows for relatively rapid responses to unforeseen changes, which can be a critical advantage relative to competitive markets.

The purpose of this Growth Analysis and Land Needs Assessment is to establish a long-term vision for Oxford County, building upon the County's existing broad long-term O.P. growth management goals and objectives. More specifically, this chapter provides direction regarding long-term population and employment growth, housing needs by Area Municipality and planning policy area, long-term urban land requirements over a 20- to 30-year planning horizon, as well as planning policy direction with respect to

planning for Community Areas, Employment Areas and rural employment areas. Lastly, this chapter provides broad direction regarding growth monitoring, including potential recommendations to enhance the County's systems and approaches with respect to ongoing growth tracking, benchmarking and growth management.

This review will serve as a foundational document for the O.P. and other growth-related studies and documents by providing guidance on where and how residential and non-residential development and change are planned and prioritized as the County and its Area Municipalities continue to mature and evolve over the near-, medium-, and long-term planning horizon.

10.2 Implementing Study Outcomes

This Growth Analysis and Land Needs Assessment includes several technical outcomes that should be incorporated into the O.P. Figures 10-1, 10-2, and 10-3 summarize the population, housing, and employment forecast that should be updated in the O.P. (O.P. Section 4.2).

Figure 10-1
Oxford County
Population, Housing and Employment Growth Forecast by Area Municipality
Population Growth Forecast

	2021	2031	2041	2051	2061
Oxford County	126,800	155,000	180,100	202,400	223,600
Woodstock	48,700	60,000	71,100	80,800	90,300
Tillsonburg	18,800	24,300	30,100	34,900	39,300
Ingersoll	14,300	16,700	19,100	20,900	22,600
Blandford-Blenheim	7,900	9,000	9,900	10,700	11,400
East Zorra-Tavistock	8,200	10,200	11,600	13,000	14,400
Norwich	11,900	14,200	15,400	17,000	18,500
South-West Oxford	8,000	9,300	9,900	10,800	11,600
Zorra	9,000	11,300	13,000	14,300	15,500

Source: Statistics Canada Census 2021 and forecast by Watson & Associates Economists Ltd., 2025.

Figure 10-2
Oxford County
Population, Housing and Employment Growth Forecast by Area Municipality
Housing Growth Forecast

	2021	2031	2041	2051	2061
Oxford County	47,830	59,380	70,280	80,330	89,800
Woodstock	18,890	23,800	28,630	33,050	37,240
Tillsonburg	8,030	10,470	13,070	15,290	17,340
Ingersoll	5,500	6,430	7,470	8,320	9,100
Blandford-Blenheim	2,780	3,200	3,580	3,940	4,270
East Zorra-Tavistock	2,980	3,770	4,340	4,960	5,540
Norwich	3,850	4,670	5,220	5,870	6,490
South-West Oxford	2,640	3,050	3,320	3,630	3,930
Zorra	3,160	3,990	4,650	5,270	5,890

Source: Statistics Canada Census 2021 and forecast by Watson & Associates Economists Ltd., 2025.

Figure 10-3
Oxford County
Population, Housing and Employment Growth Forecast by Area Municipality
Employment Growth Forecast

	2024	2031	2041	2051	2061
Oxford County	66,200	77,700	88,900	99,500	109,700
Woodstock	29,300	35,200	41,100	46,600	51,900
Tillsonburg	10,400	12,400	14,500	16,500	18,300
Ingersoll	9,900	11,600	13,300	14,700	16,200
Blandford-Blenheim	1,900	2,200	2,400	2,700	2,900
East Zorra-Tavistock	3,200	3,600	4,000	4,400	4,800
Norwich	5,100	5,600	6,000	6,500	7,000
South-West Oxford	3,400	3,700	3,900	4,100	4,300
Zorra	3,000	3,400	3,700	4,000	4,300

Note: 2024 has been estimated from building permits.
Source: 2024 estimate and forecast by Watson & Associates Economists Ltd., 2025.

Provided below is a list of components of the O.P. that will need to be updated.

- The population, housing and employment growth forecasts referenced earlier in this report are the basis for all land use and infrastructure planning in the County and by Area Municipality. As such, it is essential that the County's O.P. identify these updated forecasts as the basis for planning for the anticipated growth in the County and by Area Municipality.
- Intensification in the context of this report means residential growth within the County's built boundary (geographic area referred to as the B.U.A.) Intensification can happen in several ways: through the demolition and redevelopment of existing buildings, the development of vacant lots, or infill development on underutilized lots, such as the large surface parking areas in shopping plazas.
- Subsections 7.2.2.5, 8.2.2.5, and 9.2.2.5 of the County O.P. currently sets out a residential intensification target of 15% for the City of Woodstock, the Town of Tillsonburg and the Town of Ingersoll.
- Subsection 6.2.1 of the County O.P. further requires that a sufficient land supply is provided in Rural Settlement designations to accommodate projected demand for a range of anticipated new dwelling types over the planning period, taking into consideration opportunities for residential intensification within Serviced Village designations.
- It is recommended that the County provide updated residential intensification targets for the County's Large Urban Centres in accordance with the results of this study. The County should consider different intensification rates for the Townships and Towns/City as identified in this Report, recognizing that the scale of opportunities for intensification varies across the County. It is recognized that the existing B.U.A. land supply in Woodstock and Tillsonburg is somewhat less than the total forecast B.U.A. demand over the 30-year period. Therefore, if the County adopts a 30-year planning period, the potential B.U.A. supply shortfall should be reviewed at the time of any proposed settlement boundary expansion, to determine if any adjustment to the greenfield land need may be warranted to offset any B.U.A. supply deficiency. Furthermore, the County, in partnership with the Area Municipalities, will need to continue monitoring intensification rates. Figure 10-4 summarizes the revised recommended residential intensification

targets for the City of Woodstock and the Towns of Tillsonburg and Ingersoll as follows:

Figure 10-4
Oxford County
Residential Intensification Targets for Large Urban Centres

	Revised Residential Intensification Target
Woodstock	25%
Tillsonburg	25%
Ingersoll	25%

Source: Watson & Associates Economists Ltd.

- The P.P.S., 2024 removes the requirement for settlement area boundary expansions to occur through an M.C.R. One of the outcomes of this changes is that settlement expansions now have greater potential to be proposed through a privately-initiated O.P. Amendment, provided that the requirements of section 2.3.2 of the P.P.S., 2024 are met. This may require additional tests to be placed in the County O.P., that proposed expansions would be required to meet.
- For the permitted 20- to 30-year P.P.S. planning horizon and informed by provincial guidance, consider the initiation of Settlement Area Boundary Expansion reviews and, where required, municipal boundary adjustment discussions to address the need for additional Community Area land for:
    - City of Woodstock
    - Town of Tillsonburg
    - Town of Ingersoll
    - Township of East Zorra-Tavistock
    - Township of Norwich
    - Township of South-West Oxford
- For the permitted 20- to 30-year P.P.S. planning horizon, or potentially beyond this time horizon where appropriate, undertake Settlement Area Boundary Expansion reviews for Employment Area Expansions for:
    - City of Woodstock (note: does not require SABE Review, due to previous Secondary Plan work, only an OPA to bring identified FUG lands into the settlement boundary)
    - Town of Tillsonburg
    - Township of Norwich

- Township of East Zorra-Tavistock
- Township of South-West Oxford

10.3 Further Considerations Regarding Intensification, Housing and Growth Monitoring

Building on the findings of this review, the County should consider undertaking an urban structure study or similar study to confirm priority intensification areas, including establishing strengthened policy-level criteria to reflect each community and to inform review of development applications. Providing additional housing supply through intensification is a key goal of the County and its Area Municipalities. The existing policy framework and land use designations do not currently identify priority areas for intensification beyond the existing Central Areas/Village Core. This was reiterated by the feedback received through the intensification review completed for nodes and corridors. As there is only so much market demand for intensification in these areas, a clear policy framework to direct where this growth would ideally occur would be of benefit to the long-term vision for the County.

A study of this nature to confirm the desired urban structure would typically entail:

- **Policy Review** – review of provincial direction regarding urban structure and overview of existing land use designations, how they function in a policy context, including existing urban structure elements.
- **Establishing Opportunities and Constraints** – this would include mapping and analyzing the existing urban structure as identified from the policy review, maps related to existing land use/character areas, planned land use including development applications, vacant/underutilized parcels/contaminated sites, transportation, natural heritage/parks and open space, and servicing, including capacity limitations.
- **Vision for Future Growth** – a vision/guiding principles for growth would inform where/how intensification should occur, this could be completed as a design charrette approach to engagement led by the County.
- **Transportation and Servicing Assessment** – an analysis/assessment of both transportation and servicing (including water/wastewater/stormwater) is an important component of identifying and planning for an urban structure and priority intensification areas. Direction on phasing could be an outcome of this assessment to inform long-range planning.

- **Policy Direction** – in addition to an Urban Structure Schedule for the O.P., an outcome of the review could include direction on strengthened policy-level criteria to reflect each community on where higher density would be prioritized.
- **Stakeholder Engagement** – engagement throughout the process to get input from a range of stakeholders, including the public, interested and affected parties, area municipal staff/elected officials is a critical piece of the project.

The County should align the density ranges for the Large Urban Centres in the O.P. for consistency and to reflect anticipated trends and market demand. The O.P. currently provides directions on densities and built form for Low-, Medium-, and High-Density Residential uses. The density ranges permitted for Woodstock are higher than for Ingersoll and Tillsonburg. There is an opportunity to update Ingersoll and Tillsonburg densities to be consistent across the Large Urban Centres, to better reflect market demand, and implement Council direction from 2023. The O.P. contains similar policies for the Serviced Villages; however, they do not include a high-density designation and have lower maximum densities permitted for low- and medium-density residential uses. Council has also provided direction to staff to review potential to increase the minimum densities in the OP for residential development in the Serviced Villages, as has already been implemented through some more recently completed Secondary Plans.

It is recommended that the County support and facilitate intensification through strategically prioritizing infrastructure investment, working with its Area Municipalities to encourage redevelopment in strategic locations, and exploring potential for new/expanded Community Improvement Plan areas and programs. In addition to an enabling policy framework, there are other actions that the municipality could take once priority intensification areas are confirmed (such as through an urban structure study). The outcomes of the review of urban structure could inform priorities for infrastructure investment. In addition, some municipalities have found success by proactively working the landowners/developers and leveraging economic development resources, to facilitate redevelopment on strategic sites. This includes efforts to fast-track development by providing financial incentives through economic development and facilitating more efficient planning approvals process including combined preparation of **O.P. Amendments and Zoning By-law Amendments. These proactive efforts could be further bolstered by creating new/expanded Community Improvement Plan areas and programs**. Some municipalities within the County have Community Improvement Plans already in place.

It is recommended that the County work with the Area Municipalities to update the local zoning by-laws to implement O.P. policy direction and consider exploring the potential to add flexibility to certain development standards. It is not uncommon for a municipality's zoning by-law to not be fully aligned with O.P. policy. However, a potential development application requiring a Zoning By-law Amendment has an impact on the cost and schedule for a project.

Some of the updates to zoning could include changes to permitted uses, such as permitting a greater range of residential forms in zones that apply to the Residential designation and/or permitting mixed-use buildings/sites in zones within the Service Commercial designation.

It is recommended that the County explore the potential to add flexibility in certain development standards to facilitate desired development, such as through updates to the standards or through a Community Planning Permit System. The Province has recently passed Bill 17, which will result in an Ontario Regulation to permit, as-of-right, a 10% variance on a setback. The County could explore other opportunities to provide flexibility in development standards. This could be achieved through potential changes to certain zoning by-law regulations (such as parking standards), shifting to a form-based zoning form of land use regulation, or shifting to a community planning permit system, which allows for staff approval of a variation to any development standard if desired, including building height, if certain criteria are met. This could be further action undertaken as part of implementing an urban structure study.

It is recommended that the County review internal development approvals processes to identify any "pinch points" and opportunities for further streamlining. A Development Approval Process or "DAP" review typically includes a review of the current state through facilitated workshop sessions to evaluate current performance, an audit of active files, a best practices case study, and a future state assessment. A gap analysis is completed to identify recommendations and findings that are prioritized for implementation purposes.

It is recommended that the County develop a growth monitoring system to regularly assess population and employment growth, as well as housing supply. Section 10.6 of the O.P contains growth monitoring policies to ensure the continued relevance of the O.P. in the view of changing demographic, economic, technological,

social and environmental conditions. It is recommended that enhanced growth monitoring systems be developed to provide a clearer understanding of recent growth trends as well as insights into the potential broad-reaching impacts of urban growth. Ultimately, such tools would generate greater growth management efficiencies within the County when responding to changes in real-estate market conditions, development pressures, and provincial planning policy direction.

Consider various tools for monitoring housing growth, potentially including, but not limited to, comprehensive and interactive growth tracking/growth management models to monitor population, housing, and employment growth; intensification; greenfield development phasing and density; and other performance measures and benchmarking at the planning policy area level and other assigned levels of geography on an annual basis.

It is recommended that the County monitor intensification including that within the priority intensification areas (once confirmed) and within the B.U.A. Section 10.6 of the O.P. could be updated to include monitoring of intensification targets. To provide additional context on this need, the County could consider including a map as an Appendix to the O.P. that includes the B.U.A.

10.4 Planning for Employment Areas within Provincial and Local Planning Policy Framework

Under section 1, subsection (1) of the Planning Act, an "Area of Employment" means:

> "An area of land designated in an official plan for clusters of business and economic uses, being those uses that meet the following criteria:
>
> 1 The uses consist of business and economic uses, other than uses referred to in paragraph 2, including any of the following:
>
> I. manufacturing.
> II. Use related to research and development in connection with manufacturing anything.
> III. Warehousing uses, including uses related to the movement of goods.
> IV. Retail uses and office uses that are associated with uses mentioned in subparagraphs i to iii,
> V. Facilities that are ancillary to the uses mentioned in subparagraphs i to iv.

VI. Any other prescribed business and economic uses.

2 The uses are not any of the following uses:

I. Institutional uses.

II. Commercial, including retail and office uses not referred to in subparagraph 1 iv.

Section 2.8.2 of the P.P.S., 2024 sets out specific policies regarding the planning of Employment Areas, requiring that planning authorities protect and preserve such areas for current and future use. Section 2.8.3 of the PPS, 2024, states:

> "Planning authorities shall designate, protect and plan for all *employment areas* in settlement areas by:
>
> a) planning for employment area uses over the long-term that require those locations including manufacturing, research and development in connection with manufacturing, warehousing and goods movement, and associated retail and office uses and ancillary facilities;
>
> b) prohibiting residential uses, commercial uses, public service facilities and other institutional uses;
>
> c) prohibiting retail and office uses that are not associated with the primary employment use;
>
> d) prohibiting other sensitive land uses that are not ancillary to uses permitted in the
>
> e) employment area; and
>
> f) Including an appropriate transition to adjacent non-employment areas to ensure land use compatibility and economic viability."

Employment Areas form a vital component of the land use structure in Oxford County and form an integral part of the local economic development potential of the County and its Area Municipalities. Through the development of the Employment Area land base, Oxford County is better positioned to build more balanced, complete, and competitive communities. Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the County and its Area Municipalities. Accordingly, it is critical that all Employment Areas throughout Oxford County are planned in a manner that aims to promote economic competitiveness, attract employment growth, and maximize employment density and land utilization, where appropriate.

It is broadly recognized that protecting designated Employment Areas over the long term is important because they provide the opportunity to accommodate employment uses that cannot be easily accommodated in other areas of the County.

Notwithstanding their importance, protecting Employment Areas in a municipality can be challenging without adequate consideration regarding the requirements that support their success. For this reason, it is important to consider the local conditions that support the function and marketability of Employment Areas within the broader context of local and provincial protection policies.

If not carefully evaluated, the conversion of Employment Area lands to non-employment uses can negatively impact the County's economy in several ways. Firstly, inappropriate Employment Area removals can reduce employment opportunities, particularly in export-based sectors, creating local imbalances between population and employment. Secondly, employment removals can erode Employment Area land supply and lead to further removal/re-designation pressure as a result of encroachment of non-employment uses within or adjacent to Employment Areas.

Finally, inappropriate Employment Area removals can fragment existing Employment Areas and/or reduce their size (i.e. critical mass), undermining their functionality and competitive position. Ultimately, inappropriate Employment Area removals may reduce the County's ability to attract, accommodate and retain certain industrial uses.

As previously discussed throughout this report, structural changes in the broader economy and the nature of how we work continue to alter the nature of economic activities in Employment Areas as well as impact the built form, siting requirements and character of these lands. Given the potential negative impacts resulting from the inappropriate removals of Employment Areas, it is recognized that there is a need to preserve such designated lands within Oxford County. It is also recognized that, under some circumstances, an Employment Area removal may be justified for planning and economic reasons, provided such decisions are made using a systematic approach and methodology.

As noted above, the P.P.S., 2024 includes a new definition of "Employment Area" that narrows the scope of permitted uses to those directly related to "manufacturing, research and development in connection with manufacturing, warehousing, good movement, associated retail and office, and ancillary facilities." Changes to the designation of a site identified as "Employment" in the Oxford County O.P., that would

allow for uses that are not permitted under the revised and more narrowed definition of Employment Area would be considered removal of lands from an Employment Area in accordance with the PPS, 2024. Subsection 2.8.2.5 of the P.P.S., 2024 states:

> "Planning authorities may remove lands from employment areas only where it has been demonstrated that:
>
> a) there is an identified need for the removal and the land is not required for employment area uses over the long term the proposed uses would not negatively impact the overall viability of the employment area by:
>
> 1. avoiding, or where avoidance is not possible, minimizing and mitigating potential impacts to existing or planned employment area uses in accordance with policy 3.5;
>
> 2. maintaining access to major goods movement facilities and corridors;
>
> b) existing or planned infrastructure and public service facilities are available to accommodate the proposed uses; and
>
> c) the municipality has sufficient employment lands to accommodate projected employment growth to the horizon of the approved official plan."

Section 2.8.2.5 (above) builds on the previous Employment Area conversion policies as set out in section 1.3.2.5 of the P.P.S., 2020, with additional emphasis provided with respect to viability in terms of land use compatibility and access (2.8.2.5. (b), as well as new criteria requiring a municipality to ensure there is a sufficient amount of land supply of Employment lands over the long-term. As part of this study, a supplementary evaluation framework consisting of principles and criteria has been developed to be applied when evaluating potential Employment Area conversions. This evaluation framework reflects County O.P. planning policy objectives as well as local physical considerations regarding employment lands development, including but not limited to site characteristics (e.g. size, physical constraints, access, connectively and configuration), land-use compatibility issues, economic viability, infrastructure and municipal interests.

10.4.1 Employment Area Evaluation Criteria

Building on section 2.8.2.5 of the P.P.S., 2024 additional local criteria are recommended, which consider local Employment Area attributes and other matters that are not addressed by the Province. This includes local criteria related to site size, physical constraints, access, connectivity and configuration, land use compatibility issues, economic viability, infrastructure, and local municipal interests.

A key emphasis of the localized criteria relates to the quality of Employment Area lands. This approach recognizes that in certain circumstances an Employment Area removal may be recommended in the face of a localized or municipal-wide Employment Area land need shortfall by 2051 or beyond, if determined that the local site attributes of the subject lands do not support a feasible long-term outcome for industrial-type development. In contrast, a removal may not be deemed viable in the context of an Employment Area surplus if it is determined that the local site attributes of the subject lands support a feasible long-term outcome for industrial-type development.

Building on the above, the following localized Employment Area criteria are recommended to be applied in Oxford County in addition to the requirements set out in section 2.8.2.5 of the P.P.S. 2024 when assessing sites for Employment Area removal. These include:

a. The site is located outside, or on the fringe of, an assembly of Employment Areas.

b. The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, and/or servicing constraints, etc.
c. The removal of the proposed site to non-employment uses would not compromise the overall supply of large Employment Area sites at the Settlement Area level.
d. The request for removal demonstrates total job yield of the site can be maintained or improved.
e. The removal request is supported by Oxford County and applicable Area Municipal staff/Council and does not conflict with municipal interests and policies.
f. The removal of the site would not present negative cross-jurisdictional impacts that could not be overcome.

The above supplementary criteria are recommended to be used in addition to the criteria set out in section 2.8.2.5 of the P.P.S., 2024, when evaluating submissions and to provide an indication of whether or not a site is suitable for removal as an Employment Area within Oxford County. The criteria evaluation, paired with a qualitative assessment, is recommended to form staff recommendations on requests for Employment Area removals.

10.5 Planning for Employment in the County's Rural Settlement Areas and Rural Areas

The purpose of this section is to identify the demand for rural 'dry' industrial uses in the County and recommend potential options/approaches to proactively and comprehensively plan for industrial uses that are neither the best use of industrial lands in fully serviced settlement areas nor appropriate to locate in agricultural areas.

In Oxford, the matter of planning for such uses was raised at the September 27, 2023, meeting of the County Council, where the following direction was provided through resolution:

> Therefore be it resolved that staff be directed to return a report outlining possible policy solutions for Oxford's Official Plan and the Provincial Policy Statement that would allow future development and would direct such uses to un-serviced land outside growth boundaries and along main transportation routes with the intent of better utilizing serviced land and transportation infrastructure.

In response to this request, County staff requested that an initial review of the need for such uses and related land use policy considerations be undertaken as a specific component of the study.

The pressure for municipalities to permit various industrial uses outside of existing designated settlement areas (i.e. on prime agricultural lands) is not new, or unique to Oxford, but seems to have increased in intensity in recent years. Such proposals could be partially a result of a shortage of suitable, available sites in designated settlements, which is a challenge that can be addressed to some extent through land use planning. However, many proposals are simply because a site (often a pre-determined site) outside of a designated settlement is preferred over a settlement location due to its location, lower land cost, lower development/servicing costs, etc. As agricultural land will generally always be less expensive than land that has already been planned,

designated and/or approved for non-agricultural purposes, this latter motivation is not likely to go away. However, proactively planning for such uses would provide the opportunity for municipalities to direct such uses to appropriate settlement locations that have been determined through municipally-led comprehensive planning, and avoid the need for individual, site-specific proposals on a 'one off' basis.

This study provides a high-level demand and land needs assessment for rural 'dry' industrial-type employment uses in the County. The general approach is to:

- Recognize that a modest amount of rural dry-industrial lands may complement and support the County's economic base by providing for employment opportunities that are not permitted in agricultural areas (i.e. not an agricultural use, agriculture-related use, or on-farm diversified use) and would also not be necessary and/or appropriate to be accommodated within fully-serviced settlement due to a variety of factors, such as limited or 'dry' servicing needs (i.e. don't use and/or generate large quantities of water and/or wastewater), land extensive nature, incompatibility with other land uses (i.e. requiring large separation distances), etc.;
- Consider the types of sectors, uses, and forms of development that may be suitable for rural dry-industrial lands, considering a review of development trends and uses in the County and surrounding area (i.e. to serve as a starting point for further consideration and refinement through subsequent study);
- Review typical site configurations, locational characteristics, and policy frameworks in other municipalities and provide guidance to the County on appropriate scale and location criteria that would be reasonable to consider in identifying potential additional opportunities/sites for rural employment uses in the County (i.e. through a subsequent study).

This work is intended to provide the initial foundational analysis to support further County initiated study, in partnership with Area Municipalities, to identify appropriate locations and/or locational options for rural dry-industrial uses throughout Oxford and related P.P.S. and O.P. policy considerations.

10.5.1 P.P.S., 2024 Policy Direction

The P.P.S., 2024 generally requires that growth be directed to fully serviced settlements (i.e. serviced by municipal water and wastewater) to ensure the efficient use of land and infrastructure, support the creation of complete communities, protect agriculture land

and other natural resources (e.g. natural features and water resources), and ensure that such growth can be sustainably serviced over the long term with no negative impacts.

In Oxford, all lands located outside of a designated settlement are a ‘prime agricultural area’, in accordance with the P.P.S., 2024. The P.P.S., 2024 policies for development in ‘prime agricultural areas’ limit permitted uses to ‘agricultural uses’, ‘agriculture-related uses’ and ‘on-farm diversified uses’. The development of non-agricultural uses (i.e. any use that does not meet the definition of one of the above noted permitted uses) is discouraged and may only be considered for aggregate extraction and limited non-residential uses, subject to meeting various policy requirements (e.g. Minimum Distance Separation, demonstration of need and that there are no-alternative locations which avoid prime agricultural areas or are on lower priority lands, mitigation of impacts on surrounding land uses etc.). To ensure non-agricultural uses are directed to settlement areas wherever possible, the P.P.S., 2024, makes it intentionally difficult for most non-agricultural uses to justify a location outside of a settlement area, and very few site-specific proposals can address all the applicable P.P.S., 2024, policy criteria.

To ensure the long term protection of the County’s prime agricultural areas, the County should seek to avoid and/or discourage individual, site-specific proposals for non-agricultural uses, and associated piecemeal justification and review, to the greatest extent possible. To achieve this objective, the County and Area Municipalities should comprehensively and proactively plan for appropriate settlement area lands to direct and accommodate the demand for non-agricultural uses, including those that may not be appropriate to locate in a fully serviced settlement area.

10.5.2 County Official Plan Policies

All lands located outside of existing settlement areas in the County are generally designated as ‘Agricultural Reserve’ in the County Official Plan. Rural settlements include ‘Serviced Villages’ with both municipal water and wastewater services, ‘Villages’ with no municipal services or municipal water only, and ‘Rural Clusters’ with no municipal water or wastewater services. In the Agricultural Reserve, ‘agricultural uses’, as well as ‘agriculture-related uses’ and ‘on-farm diversified uses’ are the only permitted uses. Reflecting the P.P.S., 2024, the O.P. policies strongly discourage new non-agricultural uses in the Agricultural Reserve and require that they be directed to Serviced Villages as a first priority; however, uses that are suitable for development on partial services or private services may also be located in Villages or Rural Clusters.

The County has many existing examples of industrial, commercial and institutional uses and activities that provide important economic and employment opportunities in the rural area. Existing non-agricultural rural industrial uses may be found on single sites or in clusters of sites, often along provincial highways, County Roads or other major routes, intersections or activity areas and may be located within and, sometimes, outside of existing designated rural settlement areas (i.e. primarily existing legacy sites).

To proactively establish new rural dry-industrial lands/opportunity sites outside of an existing settlement area, an

O.P. Amendment would be required to change the land use designation from 'Agricultural Reserve' to an appropriate 'Settlement' designation to allow an identified site or area to be developed for such uses. The intent is that the proactive identification of new areas for rural dry-industrial uses in the rural area would typically be demonstrated through a Settlement Area Boundary Expansion (S.A.B.E.)/Secondary Plan study (i.e. to justify the extent and location/direction of the new or expanded settlement area; identify appropriate land use designations and permitted uses; urban design standards; infrastructure needs/impacts; natural, cultural and agricultural resources and how they are to be protected; etc. consistent with the relevant policies of the P.P.S., 2024 and O.P) undertaken by the County, in partnership with Area Municipalities, or Area Municipality.

These studies (or one study) would result in recommendations on the appropriate land area, location, land use designations, policy criteria, and levels of servicing (i.e. full municipal services, partial municipal services, or private services) for the proposed lands and uses. Following completion of the secondary planning and servicing studies, an amendment to the O.P. would then be initiated by the County/Area Municipality to implement the findings and recommendations of the studies.

Industrial Uses in Rural Settlements

- O.P. Section 6.4 Industrial Uses in Rural Settlements - Policies apply to Villages and Serviced Villages. Serviced Villages have Industrial designations shown on

their land use plans. Industrial uses, other than cottage industries, are not permitted with the Rural Cluster designation.[1]

- Permitted industrial uses will primarily consist of: assembling, manufacturing, fabricating, processing, repair activities, environmental industries, wholesaling, storage and warehousing industries, construction industries, communication, logistic and utility industries, transportation and cartage industries, and technological service industries.
- Ancillary showroom, retail, office and sales uses operating in association with a permitted use as set out above will be permitted but will be restricted by the Zoning By-Law to a percentage of the total floor area of the building.
- Service Commercial uses, in accordance with the policies of Section 6.3.1.2, may be permitted within the Industrial designation for lands with direct frontage on a major road or a provincial highway or a county road as set out in Schedule C-4, County Transportation Network Plan through a site-specific zoning by-law amendment.
- Site-specific zoning may also permit areas of open space such as parks or athletic fields and uses that have characteristics or functional requirements similar to industry, such as public utilities and public works yards.
- The type of employment growth that is suitable in various rural settlement areas will be largely determined by the level of municipal water and/or wastewater servicing available within the settlement. Generally, the majority of industrial growth in the County's five Townships is to be accommodated in the County's Serviced Villages. However, the type and capacity of each water/wastewater system varies and some of the systems have limitations due to overall capacity constraints, the type of effluent that can be treated, the method/distance of conveyance, etc. "Dry industrial uses", which do not rely on large volumes of water and/or produce minimal liquid waste would be appropriately located in a settlement with partial or no municipal services.[1] Serviced settlement areas with servicing limitations may also be suitable locations for some 'dry' industrial type uses, provided that the location doesn't compromise the ability to sustainably

[1] Cottage industry means a small-scale business conducted by a resident entirely within the confines of his or her own dwelling or accessory building, and may involve professional services, repairs, trades and the packaging, storage, distribution and assembly of finished products or parts from previously prepared materials. The business activity must be clearly secondary to the residential use of the property.

service the remainder of the community or limit the future logical and efficient expansion of the settlement.

- A modest amount of forecast growth is expected to comprise rural dry-industrial uses that may be better suited or more appropriately located in settlements with limited full municipal services (e.g. where there are capacity constraints and/or constraints on the type of effluent), partial municipal services (i.e. water supply only), or no municipal services. Outside of Serviced Villages, industrial growth within the Townships is anticipated to represent up to 14% of the Township's industrial growth, which is to consist of dry-industrial uses. Two-thirds of the industrial growth outside of Serviced Villages is expected to occur in Unserviced Settlement Areas within the remaining in rural areas. Furthermore, within Serviced Villages, the expectation is that industrial growth will be accommodated on full municipal servicing, even if some of that growth may be 'dry' in nature.

As noted previously, to proactively identify additional lands for new rural dry-industrial uses would require an amendment to the O.P. (supported by further study and initiated by the County, in consultation and/or partnership with the Area Municipalities) to identify the location and area of such lands and establish appropriate permitted uses, policy criteria, and development standards, building upon and/or refining the initial criteria identified in subsection 10.5.3 of this Report.

Examples of 'dry' industrial uses:

- **Welding and Metal Fabrication:** These operations typically use minimal water for cooling or cleaning and produce limited liquid waste.
- **Agricultural Support Services:** Businesses that service the agricultural sector, such as farm equipment sales and repair and feed mills, often require limited water for their primary functions.
- **Warehousing and Distribution:** requiring larger sites but only limited/small-scale buildings for storing and distributing goods, often for local agricultural products or construction materials.
- **Small-scale manufacturing:** Shops that produce custom metalwork, furniture, accessory structures, or agricultural equipment. These uses may be operated as a cottage industry business or as an on-farm diversified use.

- **Contractor yards:** Storage and base of operations for construction companies, landscapers, electricians, or plumbers.

These uses tend to have low building coverage or gross floor area ratio, meaning a limited portion of the land is developed with buildings (i.e. there are large areas for parking, loading, outdoor storage/display, etc.). This results in minimal development charges and property taxes collected by the municipality, which do not justify the high cost of the initial capital investment for urban infrastructure (roads, water, sewer, etc.). These uses are estimated to generally generate an employment density of approximately 4 jobs per net hectare. In comparison, the average employment density assumed for industrial uses in the Serviced Villages is 7 to 10 jobs per net hectare, further details are provided in Chapter 9.

For the above noted reasons, the land needs assessment and policy recommendations in this report are only intended for rural 'dry' industrial uses that are also land extensive. Other rural 'dry' industrial uses that are not also land extensive (e.g. that have larger buildings, higher building coverage, and/or higher employment densities) should continue to be directed to industrial lands in fully serviced settlement areas (i.e. Serviced Villages).

10.5.3 Strategic Direction/Recommendations

It is anticipated that some limited settlement area expansions or, potentially, the designation of new rural industrial settlement areas (i.e. in very specific and limited circumstances), may potentially be required to accommodate a portion of the forecast employment growth. As such, it is recommended that the County consider incorporating additional review and locational criteria specific to rural dry-industrial uses into the O.P. to guide future planning for such uses, including, where necessary, the consideration of new or expanded settlements.

Recommended criteria for the County's further review/consideration include, but are not intended to be limited to, the following:

General criteria:

1. The type, scale, and form of use/development for any land identified and/or designated for rural dry-industrial lands should be appropriately limited to accommodate only rural dry-industrial uses that are land extensive (e.g. low

building coverage and employment density). The County will need to develop policy direction to clearly differentiate the planned use of such lands from other industrial lands, so that they will serve their intended purpose and not conflict with, or undermine, the planned function of the fully serviced employment areas in the County.

2. Rural dry-industrial uses that are not land extensive (e.g. have larger buildings, higher building coverage, and/or higher employment densities) should continue to be directed to industrial lands in fully serviced settlement areas (i.e. Serviced Villages).

3. The first priority for locating rural dry-industrial uses should be existing industrial lands within fully serviced settlement areas with expected, long-term servicing constraints (e.g. limited overall system servicing capacity, lands/areas with localized servicing capacity constraints, industrial lands/areas not expected to be serviced for many years, if at all, etc.).

4. The next priority for locating such uses should be existing industrial lands within partially or privately service settlements and/or suitable existing, non-agriculturally zoned lots outside of rural settlements.

5. Where such locations are clearly not available or adequate to accommodate the forecasted need for such uses, the County and Area Municipal should consider the need for expansion of existing rural settlement areas or, where deemed necessary, the establishment of a new rural settlement area.

To help ensure efficient use of land, support complete communities, and minimize potential for conflicts with agriculture, the County should continue to direct agriculture-related uses that do not require a rural location, and on-farm diversified uses that exceed the OP size, scale and/or use criteria, to appropriate settlement area locations, which could include rural dry-industrial lands.

Criteria for considering potential settlement area expansions to accommodate such uses:

1. Adjacent to an existing rural settlement – Serviced Village, Village, or Rural Cluster.

2. Direct access to a Provincial highway or County Road.

3. Lands are suitable for sustainable private services over the long-term, where such services are required/proposed to service new development.

4. Located to ensure compatibility with existing uses and represent a logical expansion of the settlement. Further, in the case of Serviced Villages, located in a manner that will also not prevent, or limit, the logical future expansion of the settlement to accommodate forecast growth.

5. In settlement areas not currently serviced by municipal water and/or wastewater, will not create pressure for, or expectation of, the future provision and/or extension of such services.

6. Shall meet all the P.P.S., 2024 criteria for settlement expansions – need for additional land, sufficient capacity in existing or planned infrastructure, evaluation of alternatives, minimum distance separation, impacts to agricultural systems, Agricultural Impact Assessment, and phased progression of urban development.

The potential designation of new settlement areas for rural dry-industrial uses should only be considered in very specific and limited circumstances where, in the opinion of the County and Area Municipality, the expansion of an existing settlement area is not the most suitable or appropriate land use planning option, taking into consideration the applicable criteria above, as well as such matters as proximity/access to major transportation corridors (i.e. major highways, railways, etc.), potential to complement/expand upon an existing cluster of non-agricultural uses, and incompatibility with other settlement area land uses (i.e. due to odour, dust, noise, etc.).

Appendices

Appendix A
Proposed Updates to Provincial Projection Methodology Guidelines

Appendix A: Proposed Updates to Provincial Projection Methodology Guidelines

Appendix A provides additional details related to Section 2.1.3.1 on how the growth forecast and land needs assessment approach used for this study is consistent with the requirements of the proposed Updates to Provincial Projection Methodology Guidelines (P.M.G.).

Chapter 1: Introduction

- The P.M.G. states that population growth projections are informed by the P.P.S., 2024, specifically Policy 2.1.1 and 2.1.2. which are discussed in Chapter 2.1.1 of this report. In developing the growth forecast, the Ontario M.O.F. Population Projections for Ontario, Southern Ontario and the Oxford County C.D. were reviewed in Chapter 6 of this study. The population forecast to 2051 established in this study for Oxford County is consistent with the 2024 M.O.F. projections to 2051. [1, 2]

Chapter 2: Establishing Municipal Population Projection:

- Population Step 1 of the P.M.G. establishes the approach for municipal projections. Municipalities are guided to disaggregate the C.D. forecast established through Policy 2.1.1 of the P.P.S. by developing a lower and upper population projection range based on two recommended methods. Population share (Method A) is based on a municipality's population share of the C.D., and growth share (Method B) is based on the municipality's share of population growth within the C.D. Municipalities also have the flexibility to modify their projection based on local conditions.

[1] The Oxford County Growth Analysis and Land Needs Assessment technical work was undertaken under the 2024 M.O.F. projections. The 2025 M.O.F. projections for the County were released in August 2025 after the work was completed.
[2] It is important to note that P.M.G. Population Step 2 states that "M.OF projections do not reflect local characteristics regarding existing and planned infrastructure capacity or availability, economic and planning assumptions, information from official plans or locally prepared projections. Therefore, the local context is helpful in supplementing the M.O.F. projections."

- Population Step 2 of the P.M.G. states that a population projection by age cohort needs to be developed to inform the development of housing forecasts. The P.M.G. recommended approach to forecast population by age group is based on an extrapolation of consecutive five-year periods within the previous 10 years. An alternative approach based on the more complex cohort-survival model, which accounts for births, death and net migration, may also be undertaken.
- This study utilizes the cohort-survival forecast methodology, with further details provided in Appendix B. The County-wide population allocations by Area Municipality are based on a number of supply and demand factors, which includes a review of historical Statistics Canada population and housing growth trends. Additional details are provided in Chapter 6 of this report **Watson is consistent with the approach identified in Chapter 2 of the P.M.G.**

Chapter 3: Developing Housing Needs Forecasts

- Housing Step 1 recommends age-specific headship rates are applied to municipal-level population projections to project total housing needs.
- Housing Step 2 recommends that municipalities should adjust total housing needs to reflect local housing market factors that may impact the number and type of units needed.
- Housing Step 3 states that planning authorities shall establish and implement minimum intensification and redevelopment targets within the built-up area.
- As part of this study, a headship rate analysis by age cohort was undertaken to forecast future housing needs for the County, which were allocated by Area Municipality (see Chapter 4.5.3, Appendix B and Appendix C). The total housing forecast in this study was identified by housing structure type based on broader and local market factors, such as building permit data, active development applications, demographic trends (i.e. aging of the population), housing affordability, and increasing demand for rental housing (see Chapters 3.5, 4.4 and 4.5). A detailed residential intensification supply analysis was undertaken (see Chapter 6) which helped inform the B.U.A. forecast and intensification targets for the County and its Area Municipalities (see Chapter 8). **Watson is consistent with the methodology established in Chapter 3 of the P.M.G. for this study**.

Chapter 4: Developing Employment Forecasts

- Employment Step 1, establishes the recommended approach to calculating employment by applying the municipal activity rate to the population projections.
- Employment Step 2, states that municipalities should make adjustments to the total employment forecast established in Employment Step 1 based on local factors and data.
- Employment Step 3 provides direction to categorize the total employment forecast by land-use category: General Employment, Employment Land Employment and Rural Employment.
- Employment Step 4 lays out the recommended approach planning for employment intensification in the built-up area through consideration of recent building permit data and development applications to assist with understanding market absorption and intensification potential.
- The employment forecast in this study was developed based on the activity rate method by employment sector (primary, industrial, commercial, institutional, work at home and no fixed place of work) as a base, and adjusted based on key macro economic and regional growth assumptions, and local municipal factors through consultation with County and Area Municipal staff (refer to Chapter 3, 4.4, 4.5.5, Appendix B and Appendix C). The employment forecast was further allocated by Community Area and Employment Area employment for the purposes of land needs assessment (refer to Chapters 8 and 9). Based on this, **Watson has applied the appropriate employment forecast methodology in line with Chapter 4 of the P.M.G. for this study**.

Chapter 5: Land Needs Assessment (L.N.A.)

- The P.M.G. allows for one of three methods to be utilized in a L.N.A., including the option of a simplified method, to identify the quantity of land needed for housing and jobs, considering Employment Area land needs separately from other employment land needs. Each method is consistent with policy direction in the P.P.S., 2024 and considers available data and local conditions. Provided below is a summary of the three methods.
- **Method 1** is based on determining the total number of residents and jobs identified to be accommodated on designated lands by the planning horizon and dividing that amount by the municipality-established appropriate gross density target. The result is the quantity of gross land needs by land-uses type (residential, general employment and Employment Areas). This density-based method is particularly useful for municipalities that plan their growth around

specific density targets for residents and jobs. It is especially effective in mixed-use environments where it's challenging to separate residential and non-residential land because of multiple uses on a single site.

- **Method 2** requires municipalities to assess multiple net densities by land use, based on standard industry and land use planning practices, which then adjusted to account for gross land needs. Utilizing this approach would provide an outcome that would provide details on lands required in planning for residential, general employment and Employment Areas. Community Areas which include residential and general employment (commercial and institutional uses) are isolated with separate densities, rather than blended as identified in Method 1. **Watson has carried out this method for this study.** Details have been provided on the long-term land requirements for residential and commercial/institutional uses in this study. For simplicity, Watson has used an employment density assumption for general employment instead of using Floor Space Per Worker (F.S.W.) and Floor Space Index (F.S.I.) as identified in the proposed P.M.G. document.
- **Method 3** is a simplified approach that allows municipalities to use either Method 1 or 2 to develop housing needs with a simplified approach for accounting for employment. General employment (outside of the Employment Area) is factored in based on adding a percentage for jobs to the people and jobs total, while Employment Area is separated based on density (i.e. jobs per hectare). According to the P.M.G. document, smaller and more rural municipalities are advised to use this method, where there are resources and capacity constraints in undertaking the work required for methods 1 or 2 (e.g undertaking detailed employment surveys). This method would largely assume that a robust employment forecast or limited has not been prepared.

Appendix B
Growth Projections Approach/Methodology

Appendix B: Growth Projections Approach/Methodology

Approach and Methodology

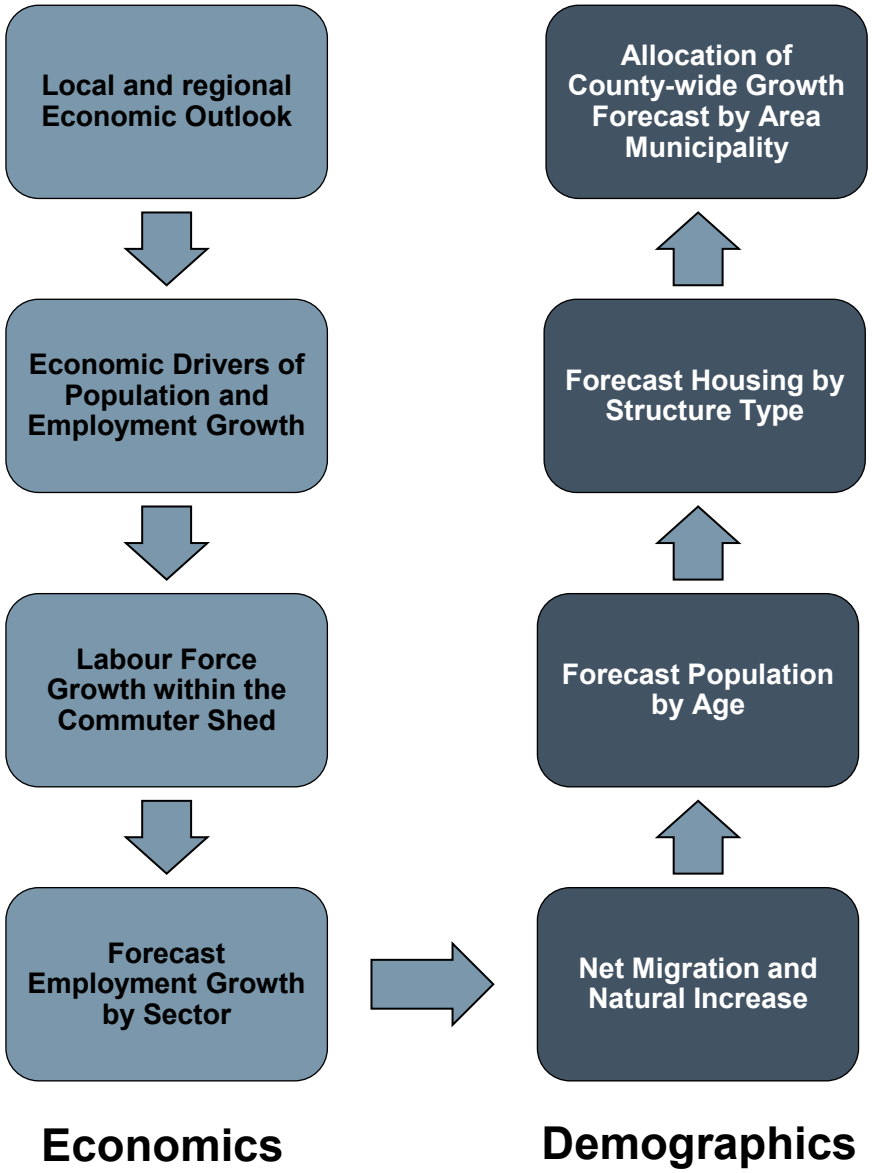
The population, household, and employment forecast methodology adopted for this study utilizes a combined forecasting approach that incorporates both the traditional "top-down" cohort-survival forecast methodology (i.e. population by age-cohort) and a "bottom-up" household formation methodology. This combined approach is adopted to ensure that both regional economic/demographic trends and local housing market conditions are adequately assessed in developing the long-term growth potential for Oxford County and its Area Municipalities.

B.1 Economic Base Model

Local/regional economic activities can be divided into two categories: those that are "export-based," and those that are "community-based." The export-based sector comprises industries (i.e. economic clusters) that produce goods that reach markets outside the community (e.g. agriculture and primary resources, manufacturing, research and development). Export-based industries also provide services to temporary and second-home residents of Oxford County (hotels, restaurants, tourism-related sectors, colleges, and universities) or to businesses outside the region (specialized financial and professional, scientific and technical services). Community-based industries produce services that primarily meet the needs of the residents in the County (retail, medical, primary and secondary education, and personal and government services). Ultimately, future permanent population and housing growth within Oxford County has been determined in large measure by the competitiveness of the export-based economy within the County and the surrounding market area.

On the other hand, population growth in the 65+ cohort will continue to be largely driven by the aging of the County's existing population and, to a lesser extent, the attractiveness of the County to older adults and seniors through net migration. The approach is illustrated schematically in Figure B-1.

Figure B-1
Population and Household Projection Model



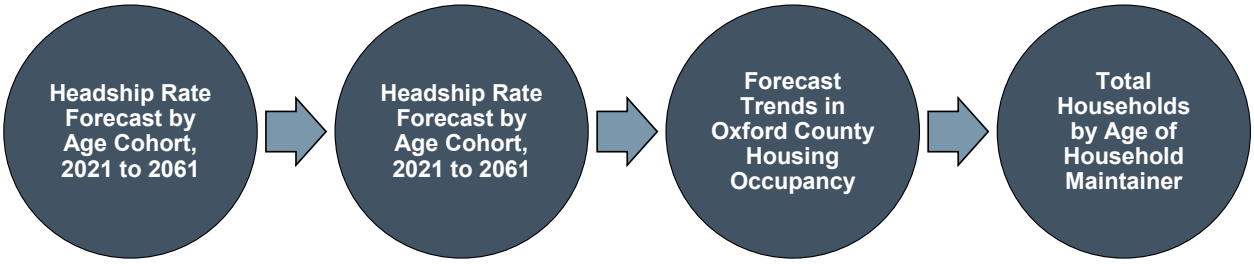
B.2 Cohort-Survival Population and Household Forecast Methodology

The cohort-survival population forecast methodology uses as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality, less out-migration, by age group).

Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy. Total housing growth is generated from the population forecast by major age group using a headship rate forecast.

A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e. cohort). Average headship rates do not tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e. 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as Oxford County's population ages, the ratio of household maintainers is anticipated to increase. The average headship rate represents the inverse of the average number of persons per unit (P.P.U.). As such, as the County's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants increases. Figure B-2 summarizes the cohort-survival forecast methodology, which is a provincially accepted approach to projecting population and corresponding total household formation.[1]

Figure B-2
Cohort-Survival Population and Household Forecast Methodology



This forecasting approach has been developed with consideration to the provincial 1995 Projection Methodology Guideline (P.M.G.) [2], proposed P.M.G. and industry best practices. This approach focuses on the rate of historical housing construction in Oxford County and the surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, housing units in the development

[1] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.
[2] Ibid.

process, and historical housing demand. Population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in P.P.U. over time within existing households.

B.3 Employment Forecast

The long-term employment growth potential for Oxford County has been developed from the labour force growth forecast, which considers both the rate and age structure of forecast labour-force growth over the 2021 to 2061 planning horizon. A long-term employment growth forecast by major employment sector/category (i.e. primary, industrial, commercial, institutional, work at home) was then established using the employment "activity rate" method.[1]

When forecasting long-term employment, it is important to understand how employment growth in Oxford County by major employment category (i.e. industrial, commercial, and institutional) is impacted by forecast labour-force and population growth. Population-related employment (i.e. retail, schools, services, and commercial) is generally automatically attracted to locations convenient to residents. Typically, as the population grows, the demand for population-related employment also increases, to service the needs of the local community. Forecast commercial and institutional activity rates have been based on historical activity rates and employment trends, as well as future commercial and institutional employment prospects within a local and regional context. Similar to population-related employment, home-based employment is also anticipated to generally increase in proportion to population growth.[2]

Industrial and office commercial employment (export-based employment), on the other hand, is not closely linked to population growth and tends to be more influenced by broader market conditions. This includes, but is not limited to, economic competitiveness, transportation access, access to labour, and distance to employment

[1] An employment activity rate is defined as the number of jobs in a municipality divided by the number of residents.
[2] Due to further advancements in telecommunications technology, it is anticipated that home-based employment activity rates may increase over the forecast period for the County.

markets) and local site characteristics.[1] As such, industrial employment (employment land employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

- Macro-economic trends influencing industrial and employment land development (i.e. industrial employment) within Oxford County and the surrounding market area);
- Historical employment trends (i.e. review of established and emerging employment clusters), non-residential construction activity, and recent employment land absorption rates; and
- Availability of serviced industrial and employment land supply (i.e. shovel-ready industrial and employment land) and future planned greenfield development opportunities on vacant designated industrial and employment lands within Oxford County and the surrounding market area

[1] Local site characteristics include, but are not limited to, servicing capacity, highway access and exposure, site size/configuration, physical conditions, and site location within existing and future industrial lands and Employment Areas throughout Oxford County and the surrounding market area.

Appendix C
County-wide Population, Housing and Employment Forecast Details

Appendix C: County-wide Population, Housing and Employment Forecast Details

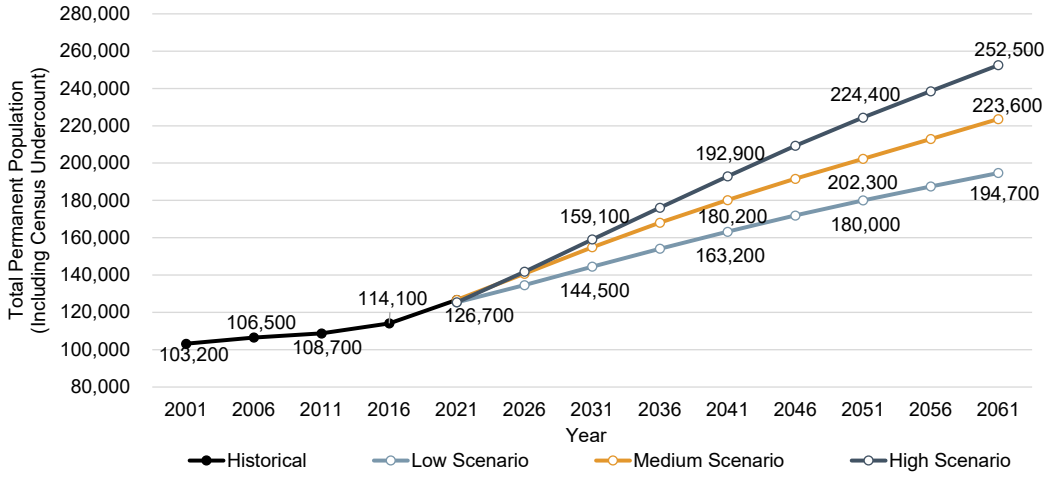
Oxford County Total Population and Employment Growth Forecast Scenarios

Building on the driving factors contributing to long-term population and employment growth in Section 4, Figure 4-7, Figure C-1 summarizes each of the long-term population growth scenarios for Oxford County to the year 2061. Key observations are as follows:

- Oxford County population grew from 103,200 in 2001 to 126,700 in 2021, representing a steady population growth over the 20-year period.
- Under the Low Growth Population Growth Scenario forecast, the County's population is expected to reach 194,700 by 2061, representing an average annual growth rate of 1.1%, which is slightly higher than the 1.0% the County has historically achieved over the past two decades.
- Under the Medium Growth Population Scenario, Oxford County's population is projected to reach 223,600 by 2061, achieving an average annual growth rate of 1.6% over the next four decades. This scenario is consistent with the Fall 2024 M.O.F. projections for Oxford County to 2051.
- Under the High Growth Population Scenario, the County's population is expected to reach 252,500 by 2061, representing the most optimistic growth trajectory, significantly higher than historical growth rates, achieving an annual growth rate of 1.8%.

These observations indicate a range of plausible long-term population growth outlooks for Oxford County, each providing potential long-term outcomes with respect to population growth and corresponding housing needs for the County.

Figure C-1
Oxford County
Total Population, 2001 to 2061

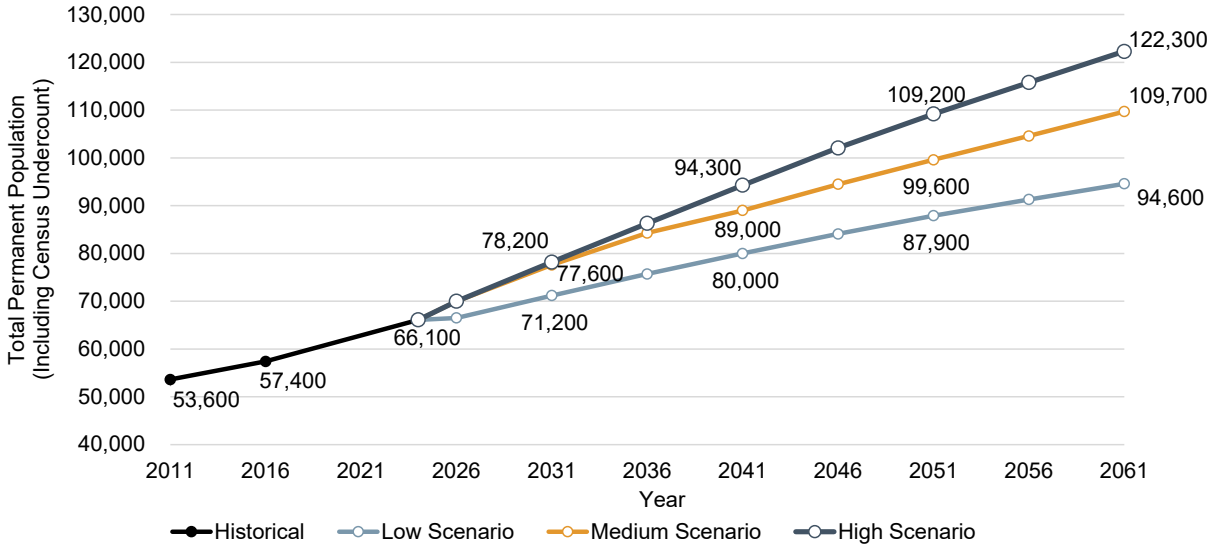


Note: Population includes net Census undercount estimated at 4.1% and figures have been rounded.
Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; forecast prepared by Watson & Associates Economists Ltd.

Each of the population growth scenarios provided in C-1 indicate that the long- term population growth outlook for Oxford County will be strong relative to population growth trends the County has experienced over the past two decades and beyond.

Building on the population and housing growth scenarios as well as key macro and regional growth assumptions discussed throughout Chapter 3 and in section 4.2, a revised long-term employment growth forecast has been prepared for Oxford County in comparison with recent historical trends. As summarized in C-2, by 2061, the employment base for the County is forecast to increase by a broad range between 28,500 to 56,200 employees, reaching 94,600 to 122,300 total jobs by 2061. Of the three long-term employment growth scenarios, the Recommended Employment Growth Scenario represents the most plausible long-term employment forecast for Oxford County, considering our review of macro, regional, and local economic trends as well as the County's recommended long-term population growth forecast, as provided in section 4.5.

Figure C-2
Oxford County
Employment Forecast Comparison, 2011 to 2061



Note: Figures have been rounded. Total employment figures include work at home and no fixed place of work. Statistics Canada 2021 Census place of work employment data has been reviewed and has not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Source: 2011 to 2016 derived from Statistics Canada Census data; forecast prepared by Watson & Associates Economists Ltd.

Of the three long-term population growth scenarios, the Medium Scenario has been determined as the Recommended Growth Scenario for the following reasons:

1. The Recommended Growth Scenario represents an ambitious, yet plausible rate of future population growth relative to historical trends, considering recent and forecast immigration levels expected for Canada and Ontario over the next several years and longer-term population growth forecasts for the Province.
2. Population growth in Oxford County will continue to be largely driven by net migration (immigration) of working-age adults. Forecast near- and long-term trends in net migration are ambitious, but plausible, for the purposes of long-range planning within the context of federal immigration targets anticipated, population growth rates and migration patterns across Southern Ontario.

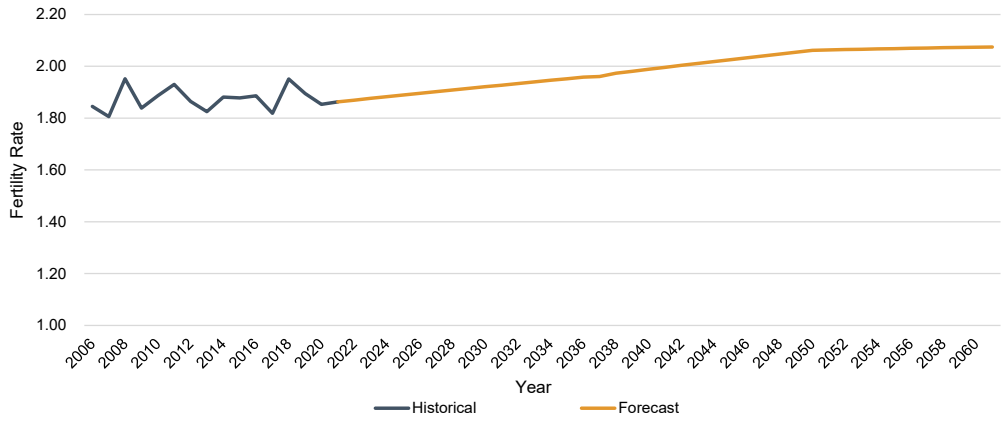
3. The forecast level of annual new housing development required to accommodate the recommended population growth forecast for Oxford County represents an ambitious outlook in housing activity relative to historical trends.

Oxford County Medium (Recommended) Growth Forecast Scenario

Appendix C provides the following additional growth forecast information for the Recommended Growth Forecast to 2061:

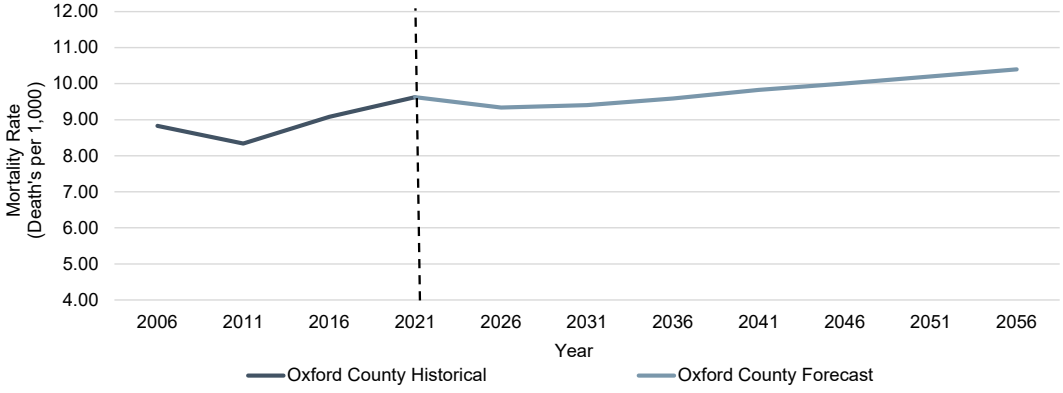
- Fertility and mortality rates.
- Components of population growth (i.e. natural increase and net migration).
- Net migration by major age cohort.
- Population forecast by major age cohort.
- Headship rates by major age cohort.
- County-wide population, housing and employment forecast.

Figure C-3
Oxford County
Recommended Growth Forecast
Fertility Rates, 2021 to 2061



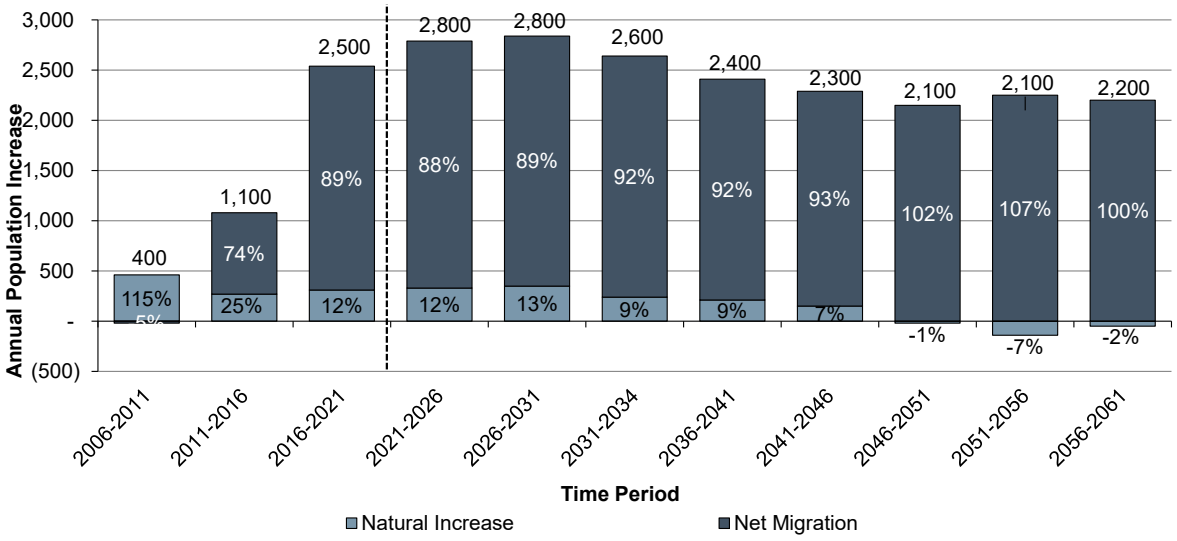
Note: Province of Ontario fertility rate forecast (reference scenario) is assumed to increase from 1.27 in 2022 to a range between 0.98 to 1.58 in 2051, in accordance with the Ministry of Finance (M.O.F.), Ontario Population Projections Update, Fall 2024.
Source: Historical fertility rate data by age of mother provided by Vital Statistics, Ontario, Office of the Registrar General. Total fertility rate data provided by Statistics Canada Demography Division (Catalogue no. 91C0005). Fertility rate forecast prepared by Watson & Associates Economists Ltd.

Figure C-4
Oxford County
Recommended Growth Forecast
Mortality Rates, 2021 to 2061



Source: Statistics Canada Demography Division (Catalogue no. 91C0005). Oxford County mortality rate from 2021 to 2061 forecast prepared by Watson & Associates Economists Ltd., based on a review of Ontario Ministry of Finance Population Projections.

Figure C-5
Oxford County
Recommended Growth Forecast
Components of Population Growth, 2001 to 2051



Note: Figures have been rounded and may not add up precisely. Population figures include a net Census undercount.
Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure C-6a
Oxford County
Historical and Forecast Net Migration by Age Cohort, Medium Scenario, 2021 to 2061

Cohort	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056	2056-2061
0-19	3,100	2,800	2,700	2,300	2,400	2,600	2,600	2,400
20-34	3,600	3,700	3,600	3,300	3,200	3,300	3,400	3,400
35-44	2,400	2,600	2,500	2,400	2,400	2,500	2,600	2,500
45-54	1,200	1,300	1,300	1,300	1,300	1,400	1,400	1,500
55-74	2,000	2,000	1,900	1,700	1,500	1,400	1,400	1,300
75+	100	100	100	100	100	-	100	-
Total	**12,400**	**12,600**	**12,200**	**11,200**	**10,800**	**11,200**	**11,500**	**11,200**

Figure C-6b
Oxford County
Historical and Forecast Net Migration Shares by Age Cohort, Medium Scenario, 2021 to 2061

Cohort	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056	2056-2061
0-19	25%	23%	22%	21%	22%	23%	23%	22%
20-34	29%	29%	29%	30%	30%	30%	30%	30%
35-44	20%	21%	21%	22%	22%	22%	22%	23%
45-54	10%	11%	11%	12%	12%	12%	12%	13%
55-74	16%	16%	16%	16%	14%	13%	12%	12%
75+	1%	1%	1%	1%	1%	<1%	1%	<1%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Figures have been rounded.
Source: 2006 to 2021 derived from Statistics Canada Census and Demography Division data, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure C-7a
Oxford County
Population Forecast by Major Age Group, Medium Scenario, 2021 to 2061

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061
0-19	27,700	26,900	27,000	29,700	33,700	37,200	39,500	41,000	42,300	43,200	44,800	47,000
20-34	19,600	19,700	20,900	23,800	24,300	23,500	24,400	27,200	30,100	32,300	33,400	34,300
35-44	15,900	13,700	13,900	16,100	20,400	25,200	26,700	24,800	24,100	25,900	28,300	30,200
45-54	15,700	17,000	15,800	14,900	16,200	19,000	23,400	28,000	29,500	27,700	27,100	28,900
55-64	11,600	13,700	15,800	17,600	17,100	16,400	17,700	20,400	24,600	29,000	30,400	28,700
65-74	8,100	9,200	11,400	13,800	16,000	17,700	17,300	16,700	17,800	20,200	24,000	28,000
75+	7,900	8,400	9,300	10,800	13,000	15,900	19,100	22,000	23,200	24,000	24,900	26,600
Total	**106,500**	**108,700**	**114,100**	**126,700**	**140,700**	**154,900**	**168,200**	**180,200**	**191,600**	**202,300**	**212,900**	**223,600**

Figure C-7b
Oxford County
Population Forecast Shares by Major Age Group, Medium Scenario, 2021 to 2061

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061
0-19	26%	25%	24%	23%	24%	24%	23%	23%	22%	21%	21%	21%
20-34	18%	18%	18%	19%	17%	15%	15%	15%	16%	16%	16%	15%
35-44	15%	13%	12%	13%	15%	16%	16%	14%	13%	13%	13%	13%
45-54	15%	16%	14%	12%	11%	12%	14%	16%	15%	14%	13%	13%
55-64	11%	13%	14%	14%	12%	11%	11%	11%	13%	14%	14%	13%
65-74	8%	8%	10%	11%	11%	11%	10%	9%	9%	10%	11%	13%
75+	7%	8%	8%	8%	9%	10%	11%	12%	12%	12%	12%	12%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Population includes Census undercount of approximately 4.1%. Figures may not add precisely due to rounding.
Source: 2006 to 2021 derived from Statistics Canada Census and Demography Division data; 2021 to 2061 derived by Watson & Associates Economists Ltd.

Figure C-8
Oxford County
Housing Headship Rates, 2021 to 2061

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061
15-24	8%	8%	8%	6%	6%	6%	6%	6%	6%	6%	6%	6%
25-34	42%	43%	42%	39%	39%	39%	39%	39%	39%	39%	39%	39%
35-44	52%	52%	51%	49%	49%	49%	49%	49%	49%	49%	49%	49%
45-54	54%	53%	56%	54%	54%	54%	54%	54%	54%	54%	54%	54%
55-64	54%	56%	56%	56%	56%	56%	56%	56%	56%	56%	56%	56%
65-74	59%	61%	59%	58%	58%	58%	58%	58%	58%	58%	58%	58%
75+	64%	64%	62%	62%	62%	62%	62%	62%	62%	62%	62%	62%
Total	37%	**38%**	**39%**	**38%**	**38%**	**38%**	**39%**	**39%**	**39%**	**40%**	**40%**	**40%**

Source: 2006 to 2021 derived from Statistics Canada Census data; 2021 to 2051 by Watson & Associates Economists Ltd.

Figure C-9
Oxford County
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census undercount)	Population (Including Census undercount)[1]	Singles & Semi-Detached Households	Multiple Dwelling Households[2]	Apartment Households[3]	Total Households	Persons Per Unit (P.P.U.) with undercount
2011	115,300	110,900	34,610	3,465	6,185	44,260	2.61
2016	110,900	115,300	34,610	3,465	6,185	44,260	2.61
2021	121,600	126,700	36,790	3,990	7,030	47,810	2.65
2026	135,200	140,700	39,695	5,525	8,395	53,615	2.62
2031	148,900	154,900	43,060	6,615	9,690	59,365	2.61
2036	161,600	168,100	46,265	7,710	11,005	64,980	2.59
2041	173,200	180,200	49,175	8,780	12,310	70,265	2.56
2046	184,200	191,600	51,845	9,875	13,630	75,350	2.54
2051	194,400	202,300	54,310	11,025	14,995	80,330	2.52
2056	204,600	212,900	56,595	12,260	16,430	85,285	2.50
2061	214,900	223,600	58,475	13,490	17,810	89,775	2.49
2011 - 2021	11,400	10,700	2,180	525	845	3,550	-
2021 - 2031	27,300	28,200	6,270	2,625	2,660	11,555	-
2021 - 2041	51,600	53,500	12,385	4,790	5,280	22,455	-
2021 - 2051	72,800	75,600	17,520	7,035	7,965	32,520	-
2021 - 2061	93,300	96,900	21,685	9,500	10,780	41,965	-

Notes: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure C-10
Oxford County
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Population Including Undercount	Primary Employment	Work at Home Employment	Industrial Employment	Commercial/ Population Related Employment	Institutional Employment	N.F.P.O.W.[1] Employment	Total Employment (Including N.F.P.O.W.)	Activity Rate
2011	108,400	1,560	4,805	19,855	13,940	7,875	5,507	53,542	49%
2016	116,000	1,375	4,845	23,280	14,475	7,655	5,729	57,359	49%
2024	135,200	1,375	6,045	27,094	16,180	7,985	7,443	66,122	49%
2026	140,700	1,375	6,320	28,830	17,220	8,510	7,760	70,015	50%
2031	155,000	1,375	7,030	32,040	19,030	9,450	8,690	77,615	50%
2036	168,100	1,380	7,630	34,950	20,680	10,250	9,430	84,320	50%
2041	180,100	1,380	8,190	36,220	22,150	10,970	10,110	89,020	49%
2046	191,700	1,380	8,730	38,300	23,590	11,710	10,790	94,500	49%
2051	202,400	1,380	9,280	40,180	24,930	12,390	11,420	99,580	49%
2056	212,800	1,380	9,780	42,050	26,270	13,080	12,070	104,630	49%
2061	223,600	1,380	10,330	43,900	27,660	13,760	12,730	109,760	49%
2011 - 2016	7,600	-185	40	3,425	535	-220	222	3,817	-
2016 - 2024	19,200	0	1,200	3,814	1,705	330	1,714	8,763	-
2024 - 2031	19,800	0	985	4,946	2,850	1,465	1,247	11,493	-
2024 - 2041	44,900	5	2,145	9,126	5,970	2,985	2,667	22,898	-
2024 - 2051	67,200	5	3,235	13,086	8,750	4,405	3,977	33,458	-
2024 - 2061	88,400	5	4,285	16,806	11,480	5,775	5,287	43,638	-

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note: Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.eSource: 2011 to 2016 data from Statistics Canada Census. 2024 to 2061 forecast by Watson & Associates Economists Ltd.

Appendix D
Population, Housing and Employment Allocations

Appendix D: Population, Housing and Employment Allocations

Figure D-1
Oxford County
Household Forecast by Area Municipality and Settlement Area, 2021 to 2061

Area	Low Density	Medium Density[1]	High Density[2]	Total
Woodstock	**7,825**	**4,325**	**6,200**	**18,345**
Ingersoll	**2,015**	**630**	**955**	**3,605**
Tillsonburg	**4,920**	**2,440**	**1,945**	**9,305**
Blandford-Blenheim	**1,055**	**255**	**180**	**1,490**
Serviced Villages	840	255	180	1,275
Unserviced Settlement Area and Remaining Rural Areas	220	0	0	220
Norwich	**1,750**	**325**	**565**	**2,640**
Serviced Village	1,350	325	565	2,240
Unserviced Settlement Area and Remaining Rural Areas	400	0	0	400
East Zorra-Tavistock	**1,820**	**475**	**260**	**2,555**
Serviced Villages	1,620	475	260	2,355
Unserviced Settlement Area and Remaining Rural Areas	200	0	0	200
South-West Oxford	**995**	**210**	**85**	**1,290**
Serviced Village	780	210	85	1,075
Unserviced Settlement Area and Remaining Rural Areas	215	0	0	215
Zorra	**1,300**	**840**	**595**	**2,735**
Serviced Villages	1,020	840	595	2,455
Unserviced Settlement Area and Remaining Rural Areas	280	0	0	280
Oxford County	**21,680**	**9,500**	**10,785**	**41,965**

Notes:
[1] Includes townhouses and apartments in duplexes.
[2] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Figure may not sum precisely due to rounding.
Source: 2021 to 2061 forecast by Watson & Associates Economists Ltd.

Figure D-2
Oxford County Employment Forecast by Area Municipality and Settlement Area,
2024 to 2061

Area	Industrial	Commercial	Institutional	Primary	Work at Home	No Fixed Place of Work[1]	Total
Woodstock	**9,660**	**5,920**	**3,360**	**0**	**1,210**	**2,450**	**22,590**
Ingersoll	**3,540**	**1,340**	**540**	**0**	**310**	**520**	**6,250**
Tillsonburg	**2,110**	**2,840**	**1,370**	**0**	**590**	**1,070**	**7,980**
Blandford-Blenheim	**420**	**150**	**60**	**0**	**280**	**120**	**1,040**
Fully Serviced Urban/Rural Settlements	370	110	50	0	280	120	930
Unserviced Settlement Area and Remaining Rural Areas	50	40	10	0	0	0	100
Norwich	**340**	**500**	**120**	**0**	**520**	**410**	**1,890**
Fully Serviced Urban/Rural Settlements	300	450	110	0	470	370	1,700
Unserviced Settlement Area and Remaining Rural Areas	40	50	10	0	50	40	190
East Zorra-Tavistock	**310**	**330**	**190**	**0**	**470**	**280**	**1,590**
Fully Serviced Urban/Rural Settlements	280	300	180	0	450	280	1,490
Unserviced Settlement Area and Remaining Rural Areas	30	30	10	0	20	10	100
South-West Oxford	**220**	**120**	**50**	**0**	**330**	**200**	**910**
Fully Serviced Urban/Rural Settlements	200	90	50	0	320	190	850
Unserviced Settlement Area and Remaining Rural Areas	20	30	0	0	10	10	70
Zorra	**210**	**270**	**70**	**0**	**570**	**230**	**1,350**
Fully Serviced Urban/Rural Settlements	190	240	70	0	520	210	1,230
Unserviced Settlement Area and Remaining Rural Areas	20	30	0	0	50	20	120
Oxford County	**16,810**	**11,470**	**5,760**	**0**	**4,280**	**5,280**	**43,600**

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd.

Figure D-3
City of Woodstock
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	37,800	38,800	10,530	2,015	3,105	15,650	2.47
2016	40,900	42,600	11,345	2,245	3,555	17,145	2.48
2021	46,700	48,700	12,335	2,590	3,965	18,890	2.58
2026	52,000	54,200	13,195	3,220	4,925	21,340	2.54
2031	57,600	60,000	14,340	3,735	5,725	23,800	2.52
2036	63,500	66,000	15,590	4,315	6,435	26,340	2.51
2041	68,400	71,100	16,625	4,805	7,195	28,625	2.48
2046	73,200	76,100	17,615	5,295	7,940	30,850	2.47
2051	77,700	80,800	18,550	5,810	8,690	33,050	2.44
2056	82,300	85,600	19,440	6,365	9,460	35,265	2.43
2061	86,800	90,300	20,160	6,915	10,165	37,240	2.42
Incremental							
2011-2021	8,900	9,900	1,805	575	860	3,240	
2021-2031	10,900	11,300	2,005	1,145	1,760	4,910	
2021-2041	21,700	22,400	4,290	2,215	3,230	9,735	
2021-2051	31,000	32,100	6,215	3,220	4,725	14,160	
2021-2061	40,100	41,600	7,825	4,325	6,200	18,350	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-4
Town of Ingersoll
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	12,100	12,500	3,820	375	575	4,770	2.61
2016	12,800	13,300	4,020	465	600	5,085	2.62
2021	13,800	14,300	4,325	470	700	5,495	2.60
2026	14,800	15,400	4,595	560	760	5,915	2.60
2031	16,100	16,700	4,930	640	860	6,430	2.60
2036	17,400	18,100	5,265	735	1,010	7,010	2.58
2041	18,400	19,100	5,540	805	1,125	7,470	2.56
2046	19,300	20,100	5,780	880	1,245	7,905	2.54
2051	20,100	20,900	6,000	950	1,370	8,320	2.51
2056	20,900	21,700	6,190	1,030	1,515	8,735	2.48
2061	21,700	22,600	6,340	1,100	1,655	9,095	2.48
Incremental							
2011-2021	1,700	1,800	505	95	125	725	
2021-2031	2,300	2,400	605	170	160	935	
2021-2041	4,600	4,800	1,215	335	425	1,975	
2021-2051	6,300	6,600	1,675	480	670	2,825	
2021-2061	7,900	8,300	2,015	630	955	3,600	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-5
Town of Tillsonburg
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	15,300	15,700	4,870	505	1,320	6,695	2.31
2016	15,900	16,500	5,150	540	1,440	7,130	2.31
2021	18,000	18,800	5,755	675	1,600	8,030	2.34
2026	20,600	21,400	6,210	1,155	1,835	9,200	2.33
2031	23,300	24,300	6,960	1,435	2,070	10,465	2.32
2036	26,500	27,600	7,905	1,665	2,325	11,895	2.32
2041	29,000	30,100	8,570	1,940	2,560	13,070	2.30
2046	31,300	32,600	9,175	2,220	2,800	14,195	2.30
2051	33,500	34,900	9,735	2,510	3,045	15,290	2.28
2056	35,700	37,100	10,250	2,815	3,300	16,365	2.27
2061	37,800	39,300	10,675	3,115	3,545	17,335	2.27
Incremental							
2011-2021	2,700	3,100	885	170	280	1,335	
2021-2031	5,300	5,500	1,205	760	470	2,435	
2021-2041	11,000	11,300	2,815	1,265	960	5,040	
2021-2051	15,500	16,100	3,980	1,835	1,445	7,260	
2021-2061	19,800	20,500	4,920	2,440	1,945	9,305	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-6
Township of Blandford-Blenheim
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	7,400	7,600	2,470	50	75	2,595	2.89
2016	7,400	7,700	2,575	35	110	2,720	2.83
2021	7,600	7,900	2,625	30	120	2,775	2.85
2026	8,100	8,400	2,775	65	150	2,990	2.81
2031	8,600	9,000	2,935	95	170	3,200	2.81
2036	9,000	9,400	3,075	125	185	3,385	2.78
2041	9,500	9,900	3,215	155	210	3,580	2.77
2046	9,900	10,300	3,345	185	230	3,760	2.74
2051	10,200	10,700	3,470	215	255	3,940	2.72
2056	10,600	11,000	3,585	250	280	4,115	2.67
2061	11,000	11,400	3,680	285	300	4,265	2.67
Incremental							
2011-2021	200	300	155	(20)	45	180	
2021-2031	1,000	1,100	310	65	50	425	
2021-2041	1,900	2,000	590	125	90	805	
2021-2051	2,600	2,800	845	185	135	1,165	
2021-2061	3,400	3,500	1,055	255	180	1,490	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-7
Township of East Zorra-Tavistock
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	6,800	7,000	2,140	60	170	2,370	2.80
2016	7,100	7,400	2,420	35	255	2,710	2.73
2021	7,800	8,200	2,610	35	335	2,980	2.75
2026	9,000	9,300	2,955	105	340	3,400	2.74
2031	9,800	10,200	3,235	160	370	3,765	2.71
2036	10,400	10,800	3,375	215	425	4,015	2.69
2041	11,100	11,600	3,620	265	455	4,340	2.67
2046	11,800	12,300	3,845	325	485	4,655	2.64
2051	12,500	13,000	4,060	380	520	4,960	2.62
2056	13,200	13,700	4,260	445	555	5,260	2.60
2061	13,800	14,400	4,430	510	595	5,535	2.60
Incremental							
2011-2021	1,000	1,200	470	(25)	165	610	
2021-2031	2,000	2,000	625	125	35	785	
2021-2041	3,300	3,400	1,010	230	120	1,360	
2021-2051	4,700	4,800	1,450	345	185	1,980	
2021-2061	6,000	6,200	1,820	475	260	2,555	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-8
Township of South-West Oxford
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	7,500	7,800	2,490	25	25	2,540	2.99
2016	7,700	8,000	2,610	35	45	2,690	2.97
2021	7,700	8,000	2,570	40	25	2,635	3.04
2026	8,400	8,700	2,760	60	45	2,865	3.04
2031	8,900	9,300	2,910	80	55	3,045	3.05
2036	9,100	9,500	2,980	115	55	3,150	3.02
2041	9,600	9,900	3,115	140	65	3,320	2.98
2046	10,000	10,400	3,240	165	75	3,480	2.99
2051	10,400	10,800	3,355	190	85	3,630	2.98
2056	10,700	11,200	3,470	220	100	3,790	2.96
2061	11,200	11,600	3,565	255	110	3,930	2.95
Incremental							
2011-2021	200	200	80	15	0	95	
2021-2031	1,200	1,300	340	40	30	410	
2021-2041	1,900	1,900	545	100	40	685	
2021-2051	2,700	2,800	785	150	60	995	
2021-2061	3,500	3,600	995	215	85	1,295	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-9
Township of Zorra
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	8,100	8,300	2,760	20	80	2,860	2.82
2016	8,100	8,500	2,955	25	95	3,075	2.76
2021	8,600	9,000	3,040	20	95	3,155	2.85
2026	9,900	10,300	3,310	195	100	3,605	2.86
2031	10,900	11,300	3,585	265	135	3,985	2.84
2036	11,700	12,100	3,815	295	195	4,305	2.81
2041	12,500	13,000	4,005	385	260	4,650	2.80
2046	13,100	13,700	4,135	485	340	4,960	2.76
2051	13,700	14,300	4,230	600	440	5,270	2.71
2056	14,200	14,800	4,290	725	555	5,570	2.66
2061	14,900	15,500	4,340	860	690	5,890	2.63
Incremental							
2011-2021	500	700	280	0	15	295	
2021-2031	2,300	2,300	545	245	40	830	
2021-2041	3,900	4,000	965	365	165	1,495	
2021-2051	5,100	5,300	1,190	580	345	2,115	
2021-2061	6,300	6,500	1,300	840	595	2,735	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-10
Township of Norwich
Population and Household Forecast, Medium Scenario, 2021 to 2061

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Units[2]	Medium Density Units[3]	High Density Units[4]	Total Housing Units	Persons Per Unit
2011	10,700	11,000	3,380	80	100	3,560	3.07
2016	11,000	11,500	3,545	85	85	3,715	3.10
2021	11,400	11,900	3,530	130	185	3,845	3.09
2026	12,500	13,000	3,890	170	240	4,300	3.02
2031	13,600	14,200	4,160	205	305	4,670	3.04
2036	14,000	14,600	4,255	250	375	4,880	2.99
2041	14,800	15,400	4,490	285	445	5,220	2.95
2046	15,600	16,200	4,705	325	515	5,545	2.92
2051	16,300	17,000	4,915	365	590	5,870	2.90
2056	17,000	17,700	5,110	410	670	6,190	2.86
2061	17,800	18,500	5,280	455	750	6,485	2.85
Incremental							
2011-2021	700	900	150	50	85	285	
2021-2031	2,200	2,300	630	75	120	825	
2021-2041	3,400	3,500	960	155	260	1,375	
2021-2051	4,900	5,100	1,385	235	405	2,025	
2021-2061	6,400	6,600	1,750	325	565	2,640	

Note: Figures may not sum precisely due to rounding
[1] Census undercount estimated at approximately 4.1%.
[2] Includes singles and semi-detached houses.
[3] Includes townhouses and apartments in duplexes.
[4] Includes bachelor, 1-bedroom, 2-bedroom+ apartment units and secondary units.
Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2061 by forecast by Watson & Associates Economists Ltd.

Figure D-11
City of Woodstock
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	175	880	8,345	6,900	4,510	2,395	23,205
2016	75	800	10,440	7,335	4,400	2,375	25,425
2024	75	1,125	12,575	7,900	4,480	3,130	29,285
2026	75	1,190	13,570	8,440	4,780	3,280	31,335
2031	75	1,370	15,420	9,380	5,320	3,670	35,235
2036	75	1,550	17,090	10,220	5,790	4,030	38,755
2041	75	1,690	17,820	10,980	6,220	4,340	41,125
2046	75	1,850	19,010	11,730	6,640	4,660	43,965
2051	75	2,010	20,100	12,420	7,040	4,960	46,605
2056	75	2,170	21,170	13,110	7,440	5,270	49,235
2061	75	2,330	22,240	13,820	7,840	5,580	51,885
Incremental							
2011-2016	-100	-80	2,095	435	-110	-20	2,220
2016-2024	0	325	2,135	565	80	755	3,860
2024-2031	0	245	2,845	1,480	840	540	5,950
2024-2041	0	565	5,245	3,080	1,740	1,210	11,840
2024-2051	0	885	7,525	4,520	2,560	1,830	17,320
2024-2061	0	1,205	9,665	5,920	3,360	2,450	22,600

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd.

Figure D-12
Town of Ingersoll
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	65	70	4,670	2,300	950	710	8,765
2016	30	335	5,090	1,905	920	715	8,995
2024	30	410	5,355	2,165	1,020	915	9,895
2026	30	430	5,720	2,290	1,070	960	10,500
2031	30	480	6,400	2,500	1,160	1,050	11,620
2036	30	540	7,010	2,690	1,230	1,140	12,640
2041	30	570	7,280	2,870	1,300	1,200	13,250
2046	30	610	7,720	3,030	1,370	1,260	14,020
2051	30	650	8,120	3,190	1,430	1,320	14,740
2056	30	680	8,510	3,350	1,490	1,370	15,430
2061	30	720	8,900	3,510	1,560	1,430	16,150
Incremental							
2011-2016	-35	265	420	-395	-30	5	230
2016-2024	0	75	265	260	100	200	900
2024-2031	0	70	1,045	335	140	135	1,725
2024-2041	0	160	1,925	705	280	285	3,355
2024-2051	0	240	2,765	1,025	410	405	4,845
2024-2061	0	310	3,545	1,345	540	515	6,255

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd.

Figure D-13
Town of Tillsonburg
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	30	270	2,895	2,575	1,450	690	7,910
2016	40	325	3,380	2,655	1,405	785	8,590
2024	40	460	4,300	3,015	1,460	1,095	10,370
2026	40	490	4,520	3,270	1,580	1,100	11,000
2031	40	570	4,920	3,720	1,810	1,320	12,380
2036	40	670	5,290	4,130	2,000	1,500	13,630
2041	40	740	5,450	4,490	2,170	1,640	14,530
2046	40	820	5,710	4,850	2,340	1,780	15,540
2051	40	900	5,940	5,180	2,510	1,910	16,480
2056	40	970	6,180	5,510	2,670	2,040	17,410
2061	40	1,050	6,410	5,850	2,830	2,160	18,340
Incremental							
2011-2016	10	55	485	80	-45	95	680
2016-2024	0	135	920	360	55	310	1,780
2024-2031	0	110	620	705	350	225	2,010
2024-2041	0	280	1,150	1,475	710	545	4,160
2024-2051	0	440	1,640	2,165	1,050	815	6,110
2024-2061	0	590	2,110	2,835	1,370	1,065	7,970

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd., 2025.

Figure D-14
Township of Blandford-Blenheim
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	245	515	818	393	115	283	2,368
2016	135	550	445	405	105	205	1,845
2024	135	637	384	365	110	247	1,878
2026	135	660	430	380	120	260	1,985
2031	135	710	510	400	130	280	2,165
2036	135	750	580	430	140	290	2,325
2041	135	790	610	440	140	310	2,425
2046	135	820	660	460	150	320	2,545
2051	135	860	710	480	160	340	2,685
2056	135	890	760	500	170	350	2,805
2061	135	920	800	520	170	370	2,915
Incremental							
2011-2016	-110	35	-373	13	-10	-78	-523
2016-2024	0	87	-61	-40	5	42	33
2024-2031	0	73	126	35	20	33	287
2024-2041	0	153	226	75	30	63	547
2024-2051	0	223	326	115	50	93	807
2024-2061	0	283	416	155	60	123	1,037

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as “persons who do not go from home to the same work place location at the beginning of each shift.” Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd., 2025.

Figure D-15
Township of Norwich
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	260	1,070	865	655	140	520	3,510
2016	310	870	1,203	738	270	651	4,041
2024	310	1,016	1,465	1,167	300	816	5,074
2026	310	1,050	1,500	1,210	310	850	5,230
2031	310	1,150	1,560	1,290	330	930	5,570
2036	310	1,200	1,620	1,360	350	960	5,800
2041	310	1,270	1,650	1,430	360	1,010	6,030
2046	310	1,340	1,690	1,490	380	1,070	6,280
2051	310	1,410	1,730	1,550	390	1,120	6,510
2056	310	1,470	1,760	1,610	410	1,170	6,730
2061	310	1,540	1,800	1,670	420	1,230	6,970
Incremental							
2011-2016	50	-200	338	83	130	131	531
2016-2024	0	146	263	429	30	165	1,033
2024-2031	0	134	95	123	30	114	496
2024-2041	0	254	185	263	60	194	956
2024-2051	0	394	265	383	90	304	1,436
2024-2061	0	524	335	503	120	414	1,896

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as “persons who do not go from home to the same work place location at the beginning of each shift.” Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd., 2025.

Figure D-16
Township of East Zorra-Tavistock
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	135	460	583	533	400	299	2,409
2016	175	540	750	675	340	330	2,810
2024	175	687	818	732	382	411	3,205
2026	175	730	850	760	400	440	3,355
2031	175	810	910	810	430	490	3,625
2036	175	860	960	860	460	510	3,825
2041	175	920	990	900	480	550	4,015
2046	175	990	1,030	940	510	590	4,235
2051	175	1,050	1,060	980	530	620	4,415
2056	175	1,100	1,100	1,020	550	660	4,605
2061	175	1,160	1,130	1,060	580	700	4,805
Incremental							
2011-2016	40	80	168	143	-60	31	401
2016-2024	0	147	68	57	42	81	395
2024-2031	0	123	92	78	48	79	420
2024-2041	0	233	172	168	98	139	810
2024-2051	0	363	242	248	148	209	1,210
2024-2061	0	473	312	328	198	289	1,600

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd., 2025.

Figure D-17
Township of South-West Oxford
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	265	595	828	223	85	329	2,324
2016	315	645	1,023	393	110	380	2,865
2024	315	775	1,307	441	113	467	3,418
2026	315	800	1,330	450	120	490	3,505
2031	315	860	1,370	470	130	520	3,665
2036	320	890	1,410	490	130	540	3,780
2041	320	940	1,420	500	140	560	3,880
2046	320	980	1,450	520	150	590	4,010
2051	320	1,020	1,470	530	150	610	4,100
2056	320	1,060	1,500	540	160	640	4,220
2061	320	1,100	1,520	560	170	670	4,340
Incremental							
2011-2016	50	50	195	170	25	51	541
2016-2024	0	130	284	48	3	87	553
2024-2031	0	85	63	29	17	53	247
2024-2041	5	165	113	59	27	93	462
2024-2051	5	245	163	89	37	143	682
2024-2061	5	325	213	119	57	203	922

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd., 2025.

Figure D-18
Township of Zorra
Employment Forecast, Medium Scenario, 2024 to 2061

Period	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W.[1]	Total Employment
2011	385	945	853	363	225	282	3,052
2016	295	780	950	370	105	288	2,788
2024	295	935	890	395	121	362	2,998
2026	295	970	910	420	130	380	3,105
2031	295	1,080	950	460	140	430	3,355
2036	295	1,170	990	500	150	460	3,565
2041	295	1,250	1,000	540	160	490	3,735
2046	295	1,320	1,030	570	170	520	3,905
2051	295	1,380	1,050	600	180	540	4,045
2056	295	1,440	1,070	630	190	560	4,185
2061	295	1,500	1,100	670	190	590	4,345
Incremental							
2011-2016	-90	-165	98	8	-120	6	-264
2016-2024	0	155	-60	25	16	74	210
2024-2031	0	145	60	65	19	68	357
2024-2041	0	315	110	145	39	128	737
2024-2051	0	445	160	205	59	178	1,047
2024-2061	0	565	210	275	69	228	1,347

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift." Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.
Note:
Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.
Figure may not sum precisely due to rounding.
Source: 2024 to 2061 forecast by Watson & Associates Economists Ltd., 2025.

Figure D-20a
Townships
Employment Lands Employment (Industrial-Type Employment) Growth by Category
20-Year (2024 to 2044)

Municipality	Employment Areas in Serviced Villages [1]	Rural Dry-Industrial[2]	Remaining Rural[3]	Total Employment Lands Employment (Industrial-Type)
Blandford-Blenheim	90	140	30	260
East Zorra-Tavistock	150	30	20	200
Norwich	160	30	20	210
South-West Oxford	80	30	20	130
Zorra	90	30	10	130
Total Townships	**570**	**260**	**100**	**930**
Total Townships (%)	**61%**	**28%**	**11%**	**100%**

[1] Includes industrial-type employment within Employment Areas in Serviced Villages.
[2] Includes dry industrial uses outside of Serviced Villages that does not require municipal servicing (water/wastewater servicing). This includes industrial uses within unserviced settlement areas and other rural areas.
[3] Includes industrial-type employment in the remaining rural area, primarily related to supporting agricultural and other rural-based uses.
Notes: Employment Lands Employment includes sector employment that operates in industrial-type buildings which primarily includes industrial sectors and includes a small portion of commercial sector employment (less than 5%).
Source: Watson & Associates Economists Ltd., 2025.

Figure D-20b
Townships
Employment Lands Employment (Industrial-Type Employment) Growth by Category
25-Year (2024 to 2049)

Municipality	Employment Areas in Serviced Villages [1]	Rural Dry-Industrial[2]	Remaining Rural[3]	Total Employment Lands Employment (Industrial-Type)
Blandford-Blenheim	110	170	30	310
East Zorra-Tavistock	170	30	30	230
Norwich	190	40	30	260
South-West Oxford	90	40	30	160
Zorra	110	30	20	160
Total Townships	**670**	**310**	**140**	**1,120**
Total Townships (%)	**60%**	**28%**	**13%**	**100%**

[1] Includes industrial-type employment within Employment Areas in Serviced Villages.
[2] Includes dry industrial uses outside of Serviced Villages that does not require municipal servicing (water/wastewater servicing). This includes industrial uses within unserviced settlement areas and other rural areas.
[3] Includes industrial-type employment in the remaining rural area, primarily related to supporting agricultural and other rural-based uses.
Notes: Employment Lands Employment includes sector employment that operates in industrial-type buildings which primarily includes industrial sectors and includes a small portion of commercial sector employment (less than 5%).
Source: Watson & Associates Economists Ltd., 2025.

Figure D-20c
Townships
Employment Lands Employment (Industrial-Type Employment) Growth by Category
30-Year (2024 to 2054)

Municipality	Employment Areas in Serviced Villages [1]	Rural Dry-Industrial[2]	Remaining Rural[3]	Total Employment Lands Employment (Industrial-Type)
Blandford-Blenheim	120	190	40	350
East Zorra-Tavistock	200	40	30	270
Norwich	215	50	30	295
South-West Oxford	120	50	30	200
Zorra	120	40	20	180
Total Townships	**775**	**370**	**150**	**1,295**
Total Townships (%)	**60%**	**29%**	**12%**	**100%**

[1] Includes industrial-type employment within Employment Areas in Serviced Villages.
[2] Includes dry industrial uses outside of Serviced Villages that does not require municipal servicing (water/wastewater servicing). This includes industrial uses within unserviced settlement areas and other rural areas.
[3] Includes industrial-type employment in the remaining rural area, primarily related to supporting agricultural and other rural-based uses.
Notes: Employment Lands Employment includes sector employment that operates in industrial-type buildings which primarily include industrial sectors and includes a small portion of commercial sector employment (less than 5%).
Source: Watson & Associates Economists Ltd., 20

Appendix E
Detailed Vacant Residential and Employment Area Land Supply Information

Appendix E: Detailed Vacant and Residential and Employment Area Land Supply Information

Figure E-1 provides a summary of the housing unit potential supply in the County's greenfield area (outside of the B.U.A., but within the serviced settlement areas). This includes supply in active applications, as well as remaining vacant sites. In total it is estimated that the Greenfield Area can accommodate approximately 10,500 housing units. The supply in the Greenfield Areas represents 58% of the total supply identified in the County (the total land supply is approximately 18,090 housing units, as a result, 10,500 / 18,090 = 58%).

Figure E-1
Oxford County
Total Housing Unit Supply Potential in Greenfield Area
(Approvals and Remaining Vacant)

Municipality	Low Density	Medium Density	High Density	Total
Woodstock	1,336	724	714	2,774
Tillsonburg	1,359	1,020	1,385	3,764
Ingersoll	588	775	-	1,363
Zorra	464	327	-	791
Embro	70	-	-	70
Thamesford	394	327	-	721
Norwich	222	12	138	372
East Zorra-Tavistock	259	45	-	304
Innerkip	58	-	-	58
Tavistock	201	45	-	246
Blandford-Blenheim	509	275	-	784
Drumbo	315	263	-	578
Plattsville	194	12	-	206
South-West Oxford	285	69	-	354
Total County	5,022	3,247	2,237	10,506

Source: Derived from Oxford County land supply data by Watson & Associates Economists Ltd., 2025.

Figure E-2 provides a summary of the housing unit potential supply in the County's Greenfield Area (outside of the B.U.A., but within the serviced settlement areas) based on approval status, while Figure 10 provides a summary of the remaining vacant greenfield lands. As summarized in Figure D-2, approximately 7,770 housing units are potentially available in the Greenfield Area in active applications – this represents approximately 74% of the total Greenfield Area unit potential (7,774 / 10,506 = 74%). As

such, the majority of the housing unit potential in the County's Greenfield Area is largely in active applications. The remaining 26% of the housing unit potential in the County's Greenfield Area is summarized in Figure E-3 which represents approximately 2,730 housing units.

Figure E-2
Oxford County
Housing Unit Supply Potential in Greenfield Area – Active Applications Only

Municipality	Low Density	Medium Density	High Density	Total
Woodstock	1,250	724	714	2,688
Tillsonburg	1,036	1,020	960	3,016
Ingersoll	109	-	-	109
Zorra	454	243	-	697
Embro	70	-	-	70
Thamesford	384	243	-	627
Norwich	86	12	138	236
East Zorra-Tavistock	142	45	-	187
Innerkip	4	-	-	4
Tavistock	138	45	-	183
Blandford-Blenheim	362	224	-	586
Drumbo	169	212	-	381
Plattsville	193	12	-	205
South-West Oxford	186	69	-	255
Total County	**3,625**	**2,337**	**1,812**	**7,774**

Source: Derived from Oxford County land supply data by Watson & Economists Ltd., 2025.

Figure E-3
Oxford County
Housing Unit Supply Potential in Greenfield Area –
Remaining Vacant (No Active Applications)

Municipality	Low Density	Medium Density	High Density	Total
Woodstock	86	-	-	86
Tillsonburg	323	-	425	748
Ingersoll	479	775	-	1,254
Zorra	10	84	-	94
Embro	-	-	-	-
Thamesford	10	84	-	94
Norwich	136	-	-	136
East Zorra-Tavistock	117	-	-	117
Innerkip	54	-	-	54
Tavistock	63	-	-	63
Blandford-Blenheim	147	51	-	198
Drumbo	146	51	-	197
Plattsville	1	-	-	1
South-West Oxford	99	-	-	99
Total County	1,397	910	425	2,732

Source: Derived from Oxford County land supply data by Watson & Associates Economists Ltd., 2025.

Figure D-4 provides a summary of the housing unit potential supply within the B.U.A. in the County's serviced settlement areas. This includes all potential regardless of application status (approvals, nodes and corridors and remaining vacant sites). As previously discussed, any growth in the B.U.A., regardless of housing type counts as intensification. As summarized in Figure D-4, the B.U.A. has the potential to accommodate approximately 7,580 housing units. The housing unit supply potential in the B.U.A. includes a range of housing types, approximately 23% of the supply is in low-density housing, while 34% is in medium-density housing and 43% is in high-density. The supply of low-density housing primarily represents potential in active applications.

Figure E-4
Oxford County
Housing Unit Supply Potential in B.U.A.
Active Applications, Nodes and Corridors and Remaining Vacant Lands

Municipality	Total B.U.A.			
	Low Density	Medium Density	High Density	Total
Woodstock	605	681	1,653	2,940
Tillsonburg	378	399	620	1,396
Ingersoll	465	458	530	1,453
Zorra (Thamesford/Embro)	42	764	388	1,194
Embro	10	42	-	52
Thamesford	32	721	388	1,141
Norwich (Norwich)	144	45	76	265
East Zorra-Tavistock (Innerkip/Tavistock)	63	114	-	177
Innerkip	22	18	-	40
Tavistock	41	96	-	137
Blandford Blenheim (Drumbo/Plattsville)	54	68	-	122
Drumbo	38	24	-	62
Plattsville	16	43	-	59
South West Oxford (Mount Elgin)	-	37	-	37
County	**1,750**	**2,566**	**3,267**	**7,584**

Source: Derived from Oxford County land supply data by Watson & Associates Economists Ltd. and Dillon Consulting Ltd., 2025.

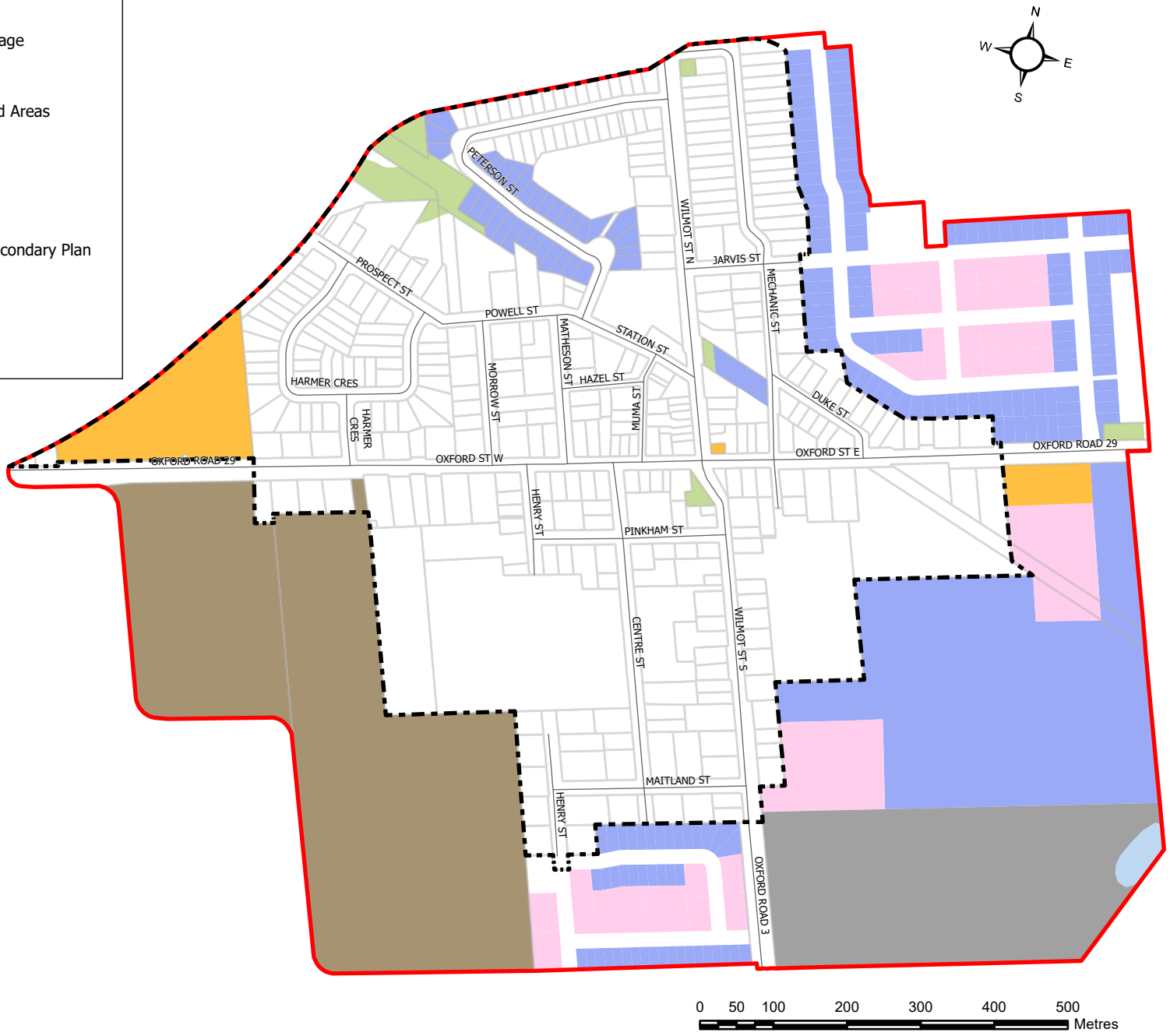
Village of Drumbo Land Supply

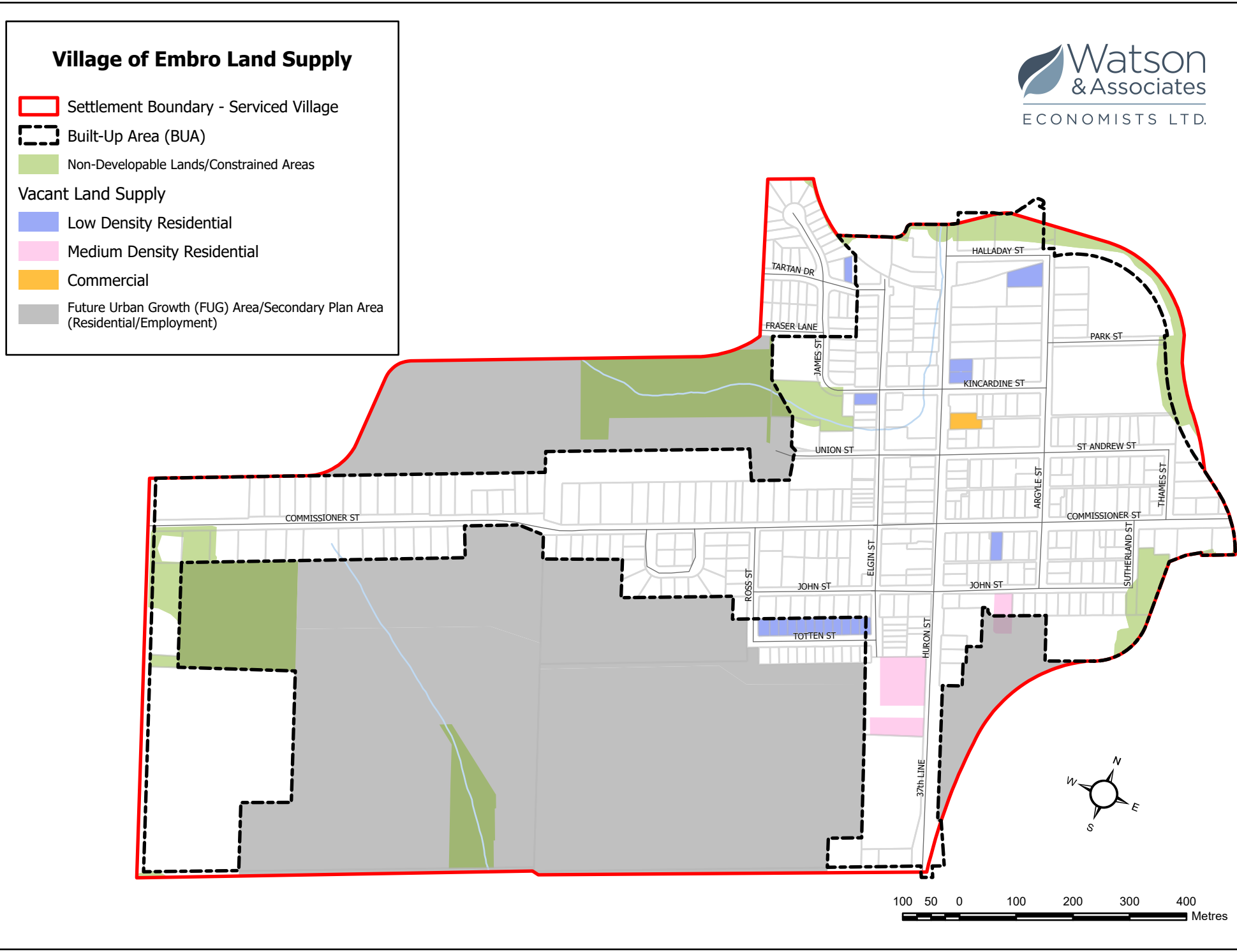
- Settlement Boundary - Serviced Village
- Built-Up Area (BUA)
- Non-Developable Lands/Constrained Areas

Vacant Land Supply

- Low Density Residential
- Medium Density Residential
- Future Urban Gowth (FUG) Area/Secondary Plan Area (Residential)
- Commercial
- Industrial

Watson & Associates ECONOMISTS LTD.




Village of Embro Land Supply
Settlement Boundary - Serviced Village
Built-Up Area (BUA)
Non-Developable Lands/Constrained Areas
Vacant Land Supply
Low Density Residential
Medium Density Residential
Commercial
Future Urban Growth (FUG) Area/Secondary Plan Area (Residential/Employment)
Watson & Associates ECONOMISTS LTD.
TARTAN DR
FRASER LANE
JAMES ST
HALLADAY ST
PARK ST
KINCARDINE ST
UNION ST
ST ANDREW ST
ARGYLE ST
THAMES ST
COMMISSIONER ST
COMMISSIONER ST
SUTHERLAND ST
ELGIN ST
ROSS ST
JOHN ST
JOHN ST
TOTTEN ST
HURON ST
37th LINE
N
W
E
S
100 50 0 100 200 300 400
Metres

Town of Ingersoll Land Supply

- Settlement Boundary
- Built-Up Area (BUA)
- Non-Developable Lands/Constrained Areas

Vacant Land Supply

- Low Density Residential
- Medium Density Residential
- High Density Residential
- Mixed Density Residential
- Industrial
- Commercial
- Institutional

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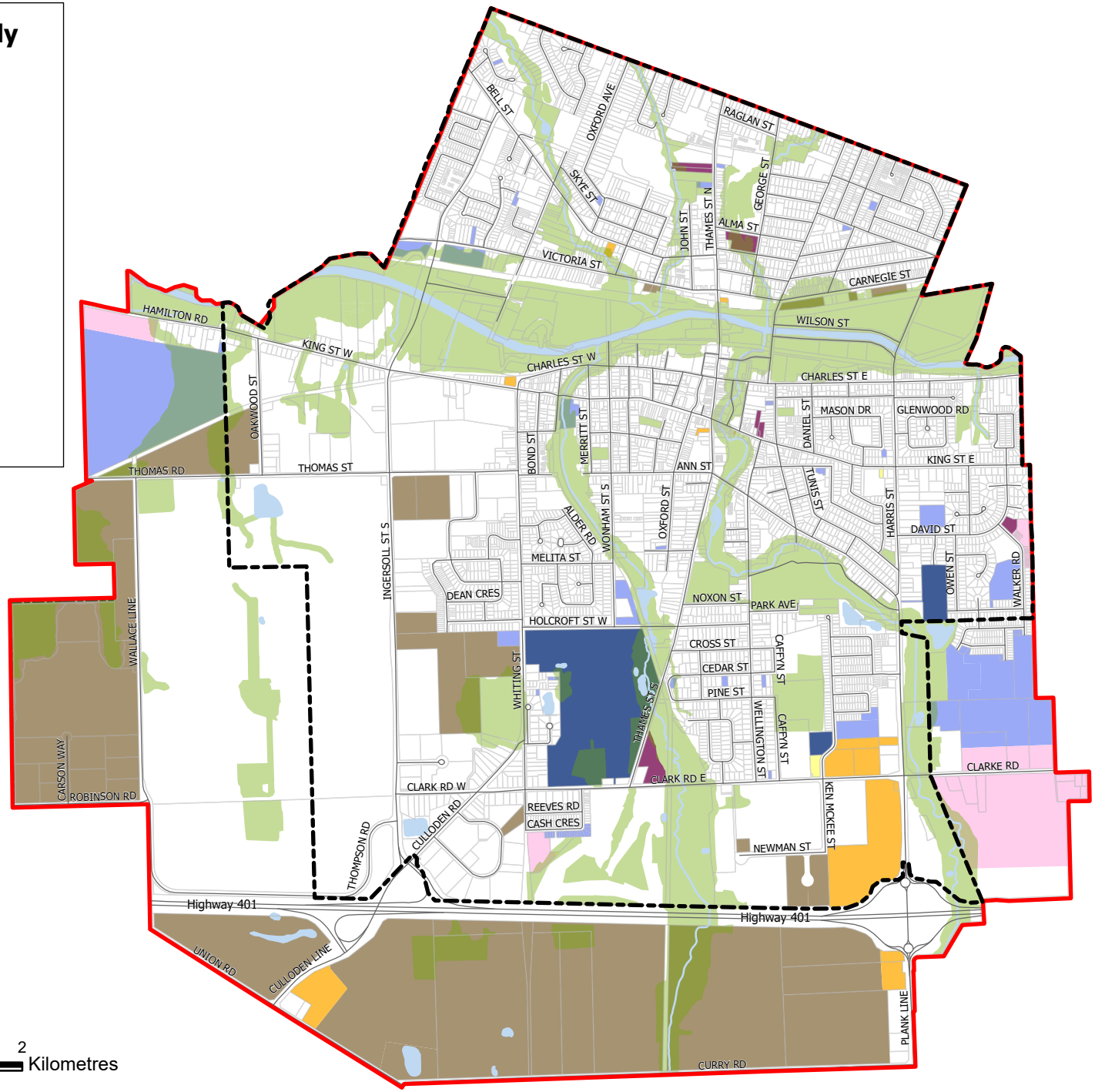


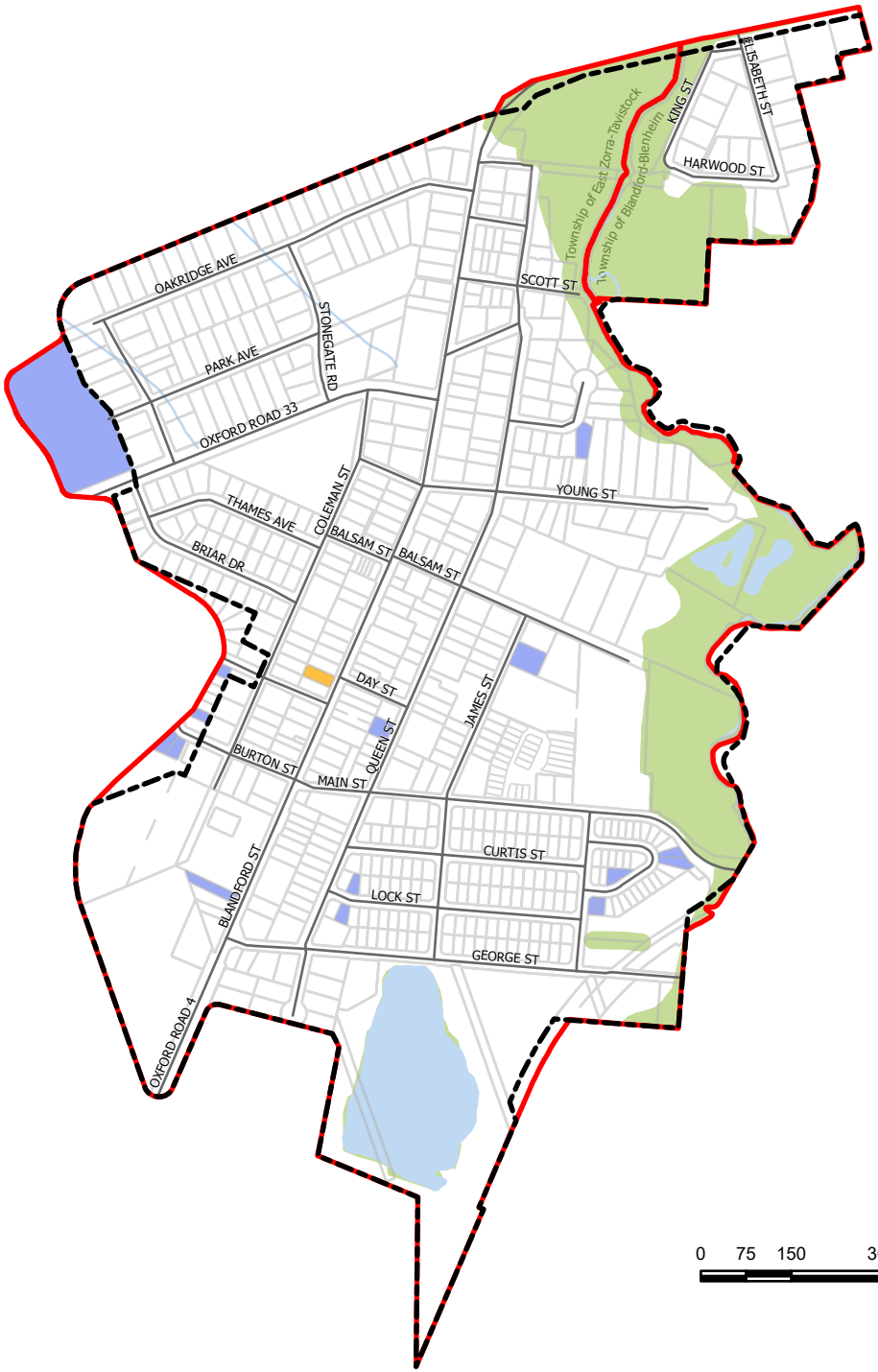
Village of Innerkip Land Supply

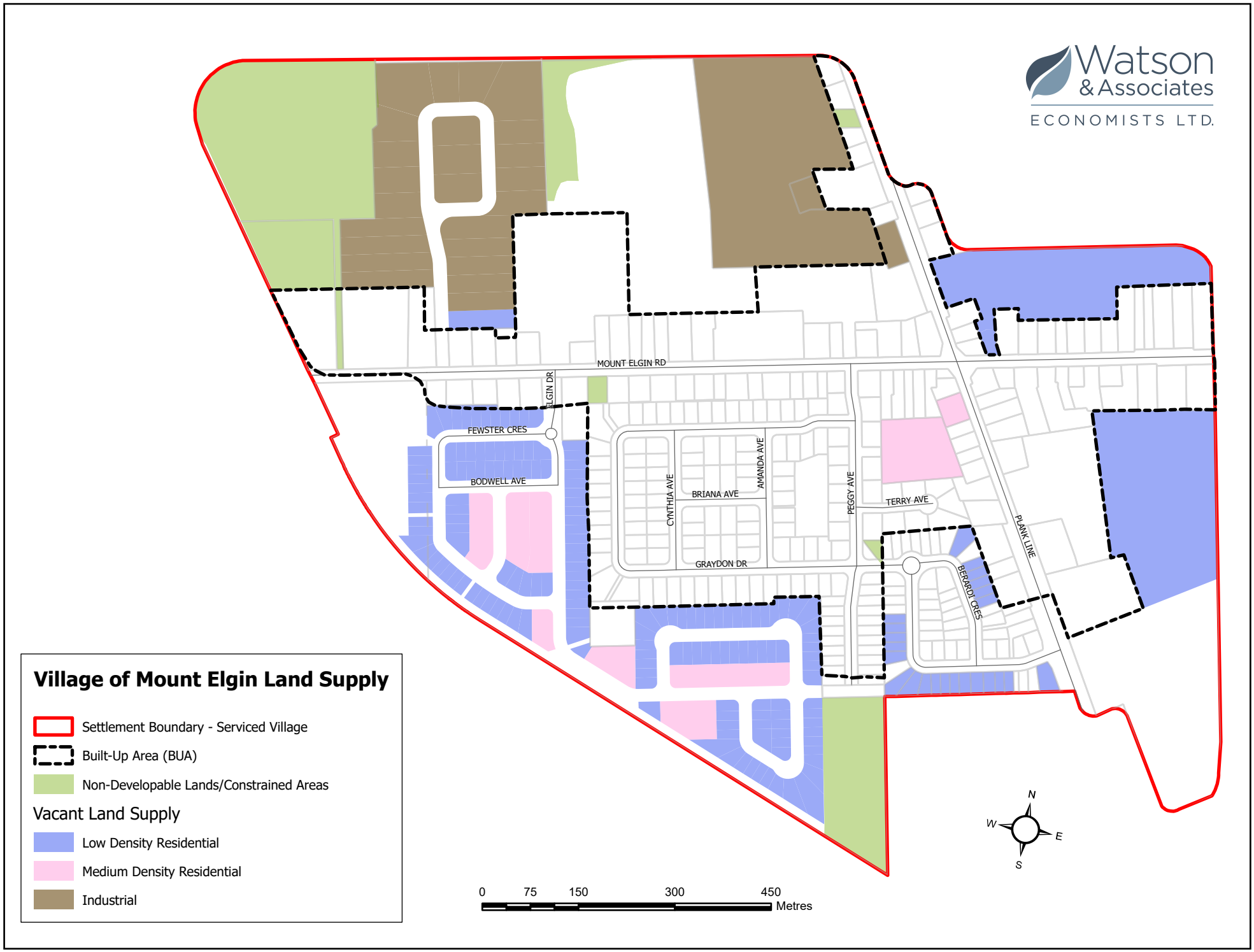
- Settlement Boundary - Serviced Village
- Built-Up Area (BUA)
- Non-Developable Lands/Constrained Areas

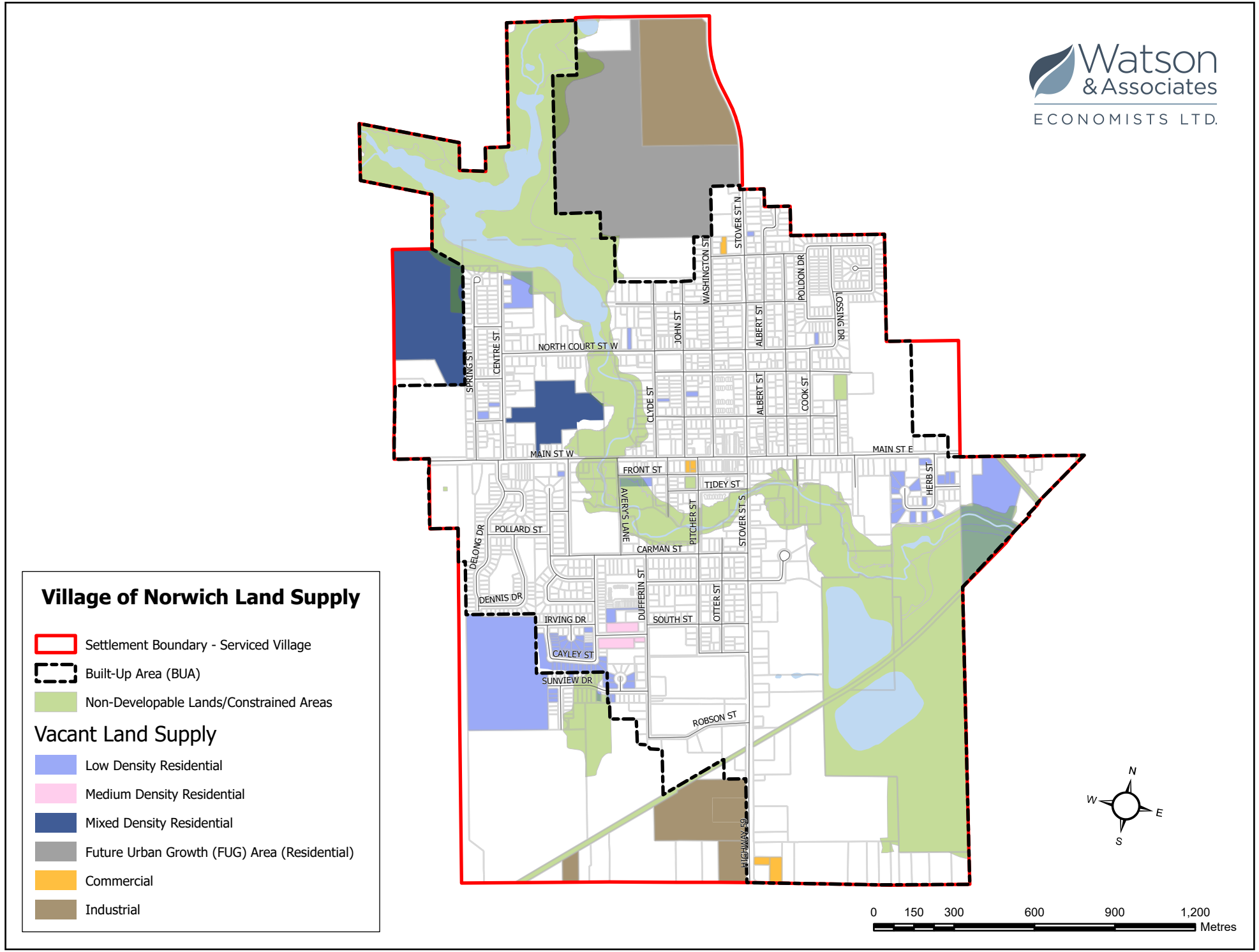
Vacant Land Supply

- Low Density Residential
- Commercial

Watson & Associates ECONOMISTS LTD.




Watson & Associates ECONOMISTS LTD.
MOUNT ELGIN RD
ELGIN DR
FEWSTER CRES
BODWELL AVE
CYNTHIA AVE
BRIANA AVE
AMANDA AVE
PEGGY AVE
TERRY AVE
GRAYDON DR
BERARDI CRES
PLANK LINE
Village of Mount Elgin Land Supply
Settlement Boundary - Serviced Village
Built-Up Area (BUA)
Non-Developable Lands/Constrained Areas
Vacant Land Supply
Low Density Residential
Medium Density Residential
Industrial
0 75 150 300 450
Metres
N
W
E
S


Watson & Associates ECONOMISTS LTD.
Village of Norwich Land Supply
Settlement Boundary - Serviced Village
Built-Up Area (BUA)
Non-Developable Lands/Constrained Areas
Vacant Land Supply
Low Density Residential
Medium Density Residential
Mixed Density Residential
Future Urban Growth (FUG) Area (Residential)
Commercial
Industrial
NORTH COURT ST W
MAIN ST W
MAIN ST E
FRONT ST
TIDEY ST
POLLARD ST
CARMAN ST
SOUTH ST
IRVING DR
DENNIS DR
CAYLEY ST
SUNVIEW DR
ROBSON ST
SPRING ST
CENTRE ST
JOHN ST
WASHINGTON ST
STOVER ST N
STOVER ST S
ALBERT ST
POLDON DR
LOSSING DR
CLYDE ST
COOK ST
HERB ST
AVERYS LANE
PITCHER ST
DELONG DR
DUFFERIN ST
OTTER ST
HIGHWAY 59
N
W
E
S
0
150
300
600
900
1,200
Metres

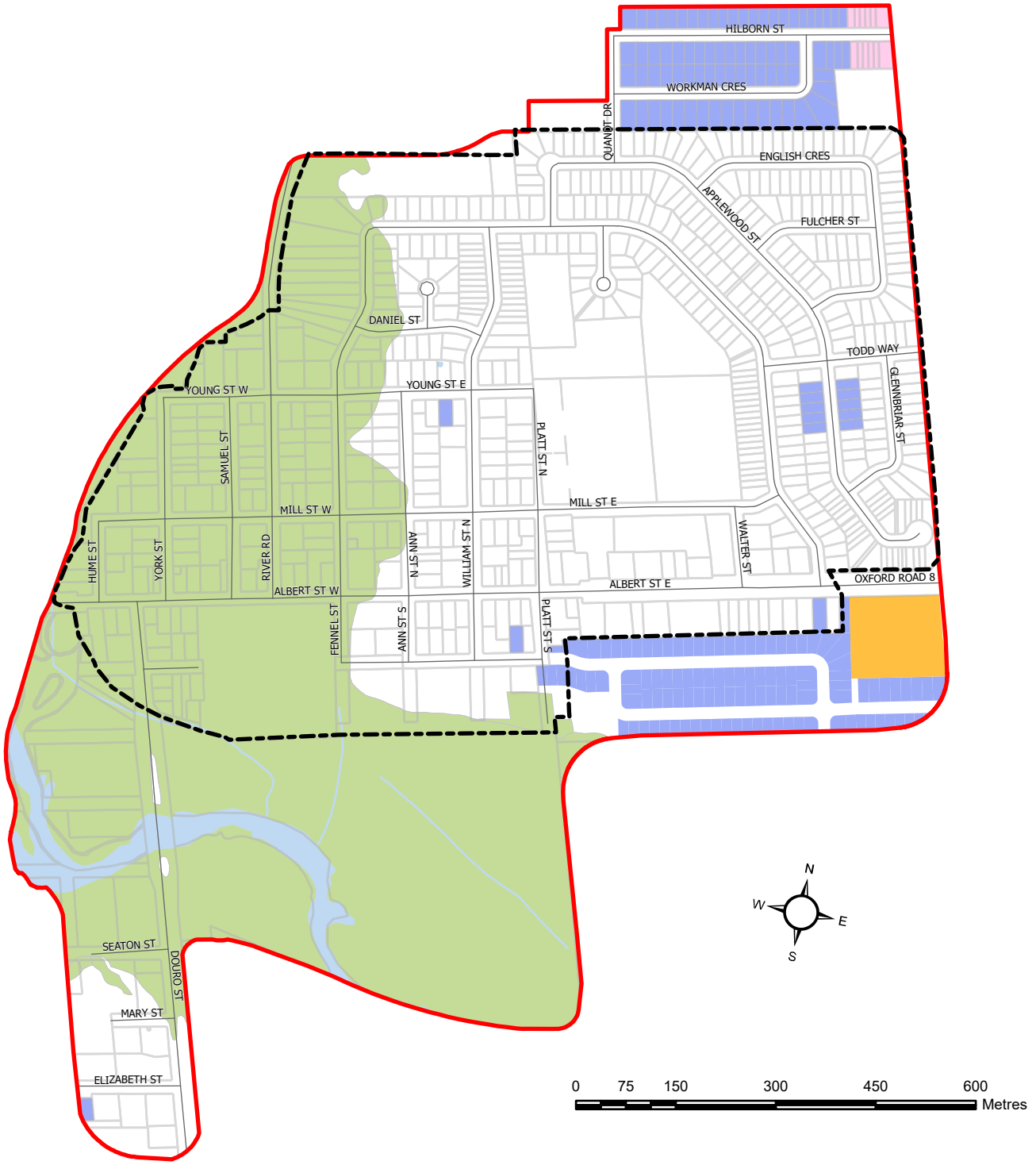
Village of Plattsville Land Supply

- Settlement Boundary - Serviced Villages
- Built-Up Area (BUA)
- Non-Developable Lands/Constrained Areas

Vacant Land Supply

- Low Density Residential
- Medium Density Residential
- Commercial

Watson & Associates ECONOMISTS LTD.



Village of Tavistock Land Supply

- Settlement Boundary - Serviced Village
- Built-Up Area (BUA)
- Non-Developable Lands/Constrained Areas

Vacant Land Supply

- Low Density Residential
- Medium Density Residential
- Commercial
- Industrial
- Institutional

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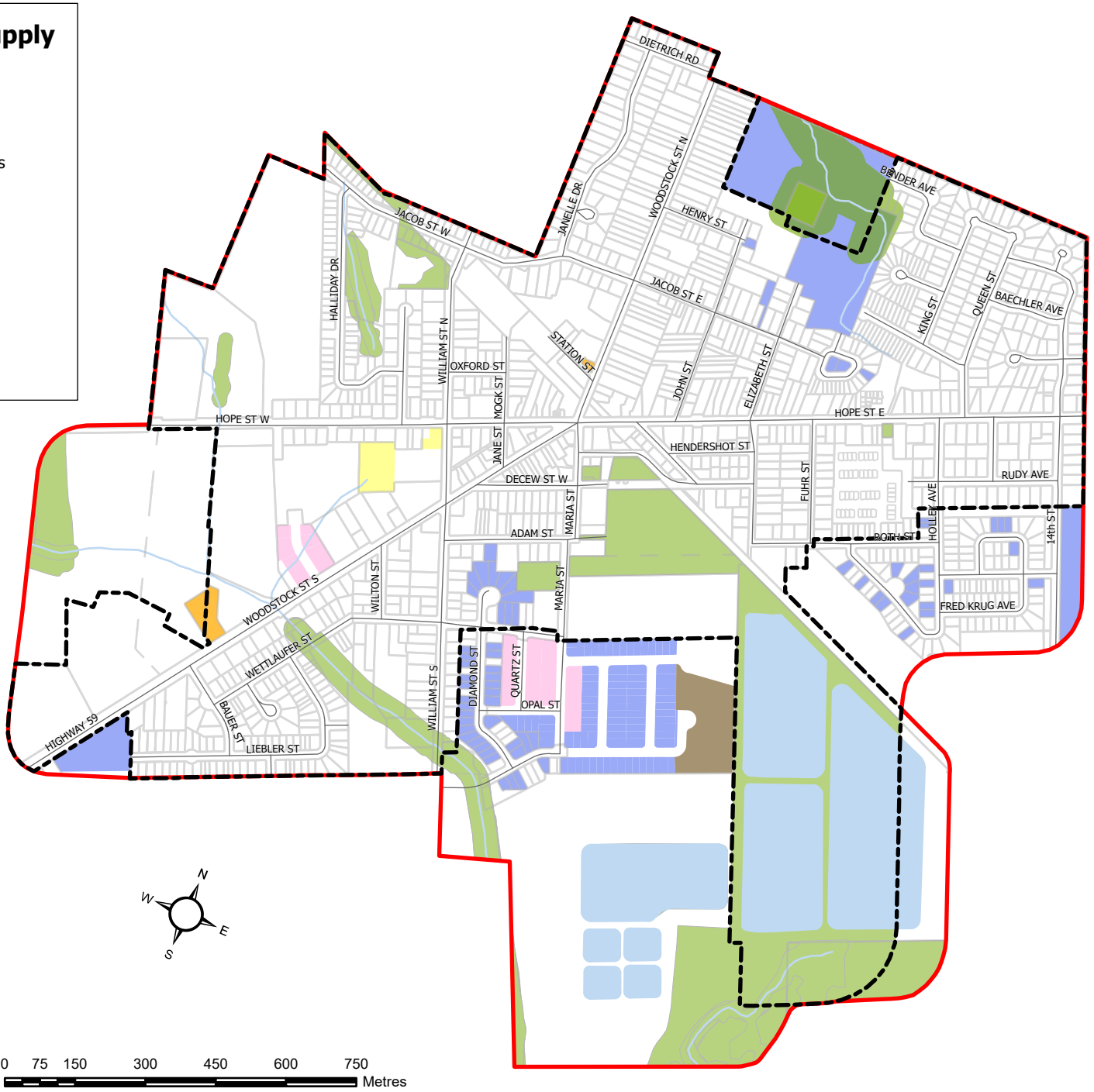
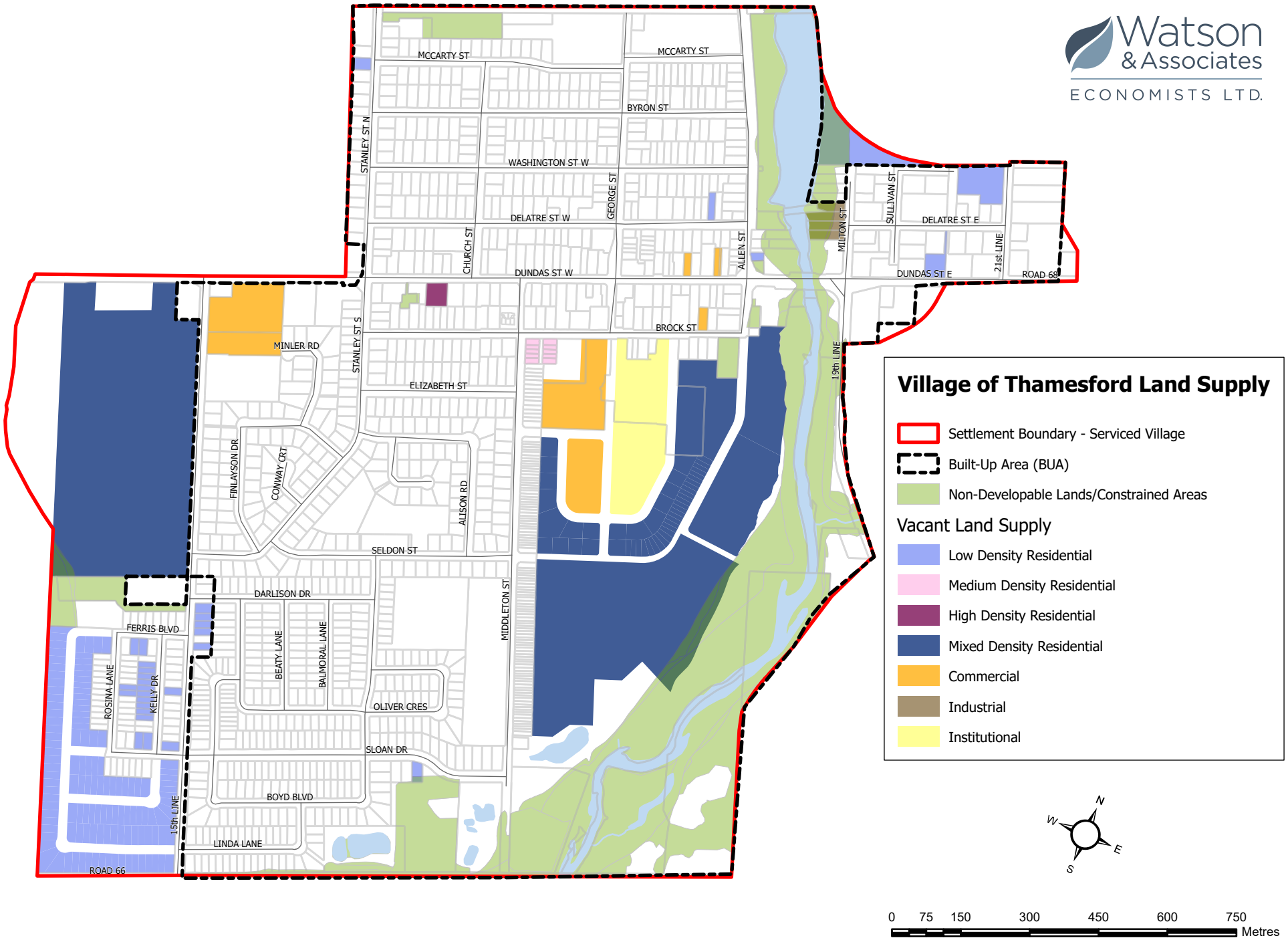


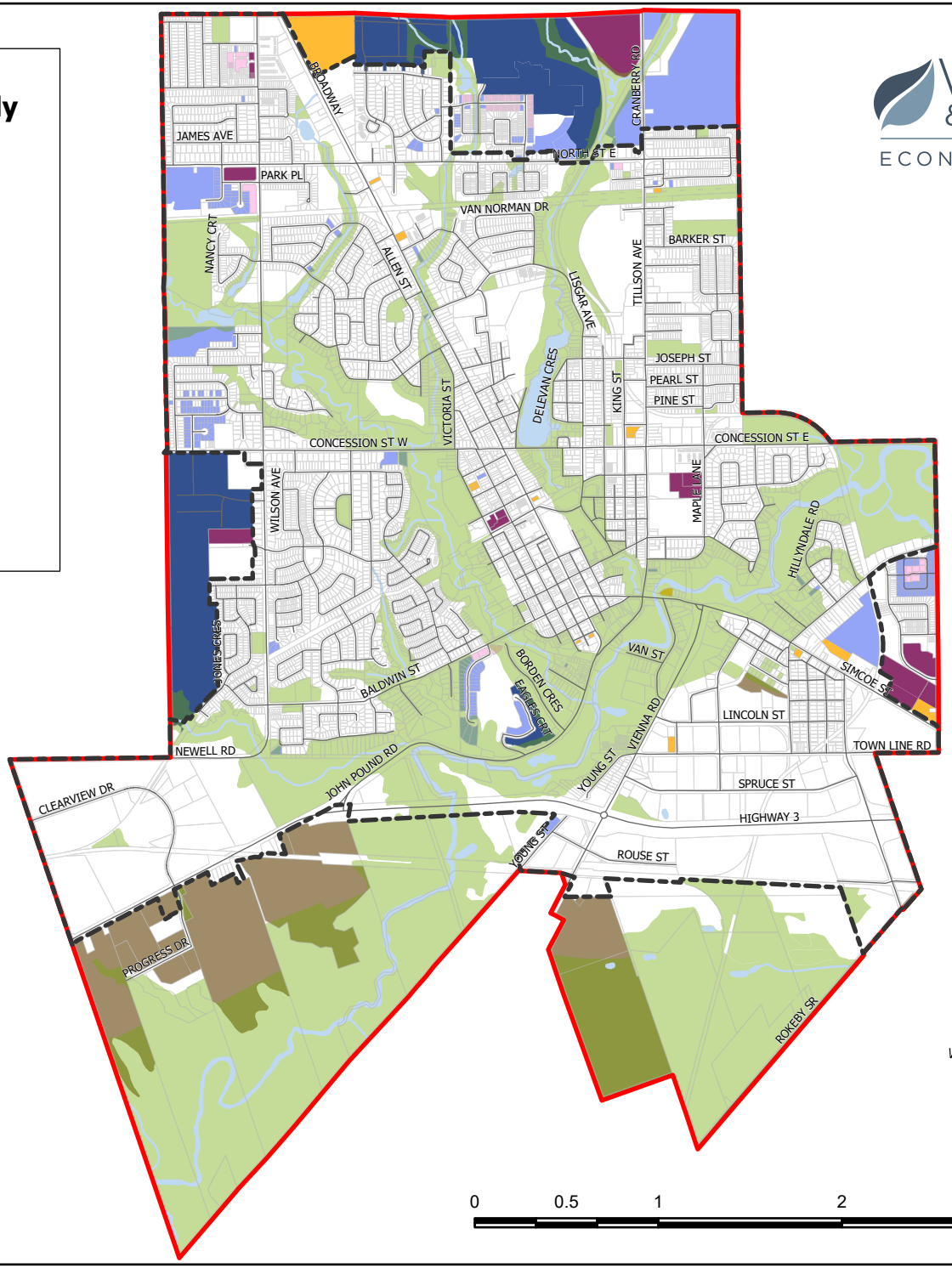

Watson & Associates ECONOMISTS LTD.
MCCARTY ST
MCCARTY ST
BYRON ST
STANLEY ST N
WASHINGTON ST W
GEORGE ST
DELATRE ST W
CHURCH ST
ALLEN ST
MILTON ST
SULLIVAN ST
DELATRE ST E
21st LINE
DUNDAS ST W
DUNDAS ST E
ROAD 68
BROCK ST
19th LINE
MINLER RD
STANLEY ST S
ELIZABETH ST
FINLAYSON DR
CONWAY CRT
ALISON RD
SELDON ST
DARLISON DR
MIDDLETON ST
FERRIS BLVD
BEATY LANE
BALMORAL LANE
ROSINA LANE
KELLY DR
OLIVER CRES
SLOAN DR
BOYD BLVD
15th LINE
LINDA LANE
ROAD 66
Village of Thamesford Land Supply
Settlement Boundary - Serviced Village
Built-Up Area (BUA)
Non-Developable Lands/Constrained Areas
Vacant Land Supply
Low Density Residential
Medium Density Residential
High Density Residential
Mixed Density Residential
Commercial
Industrial
Institutional
N
W
E
S
0
75
150
300
450
600
750
Metres

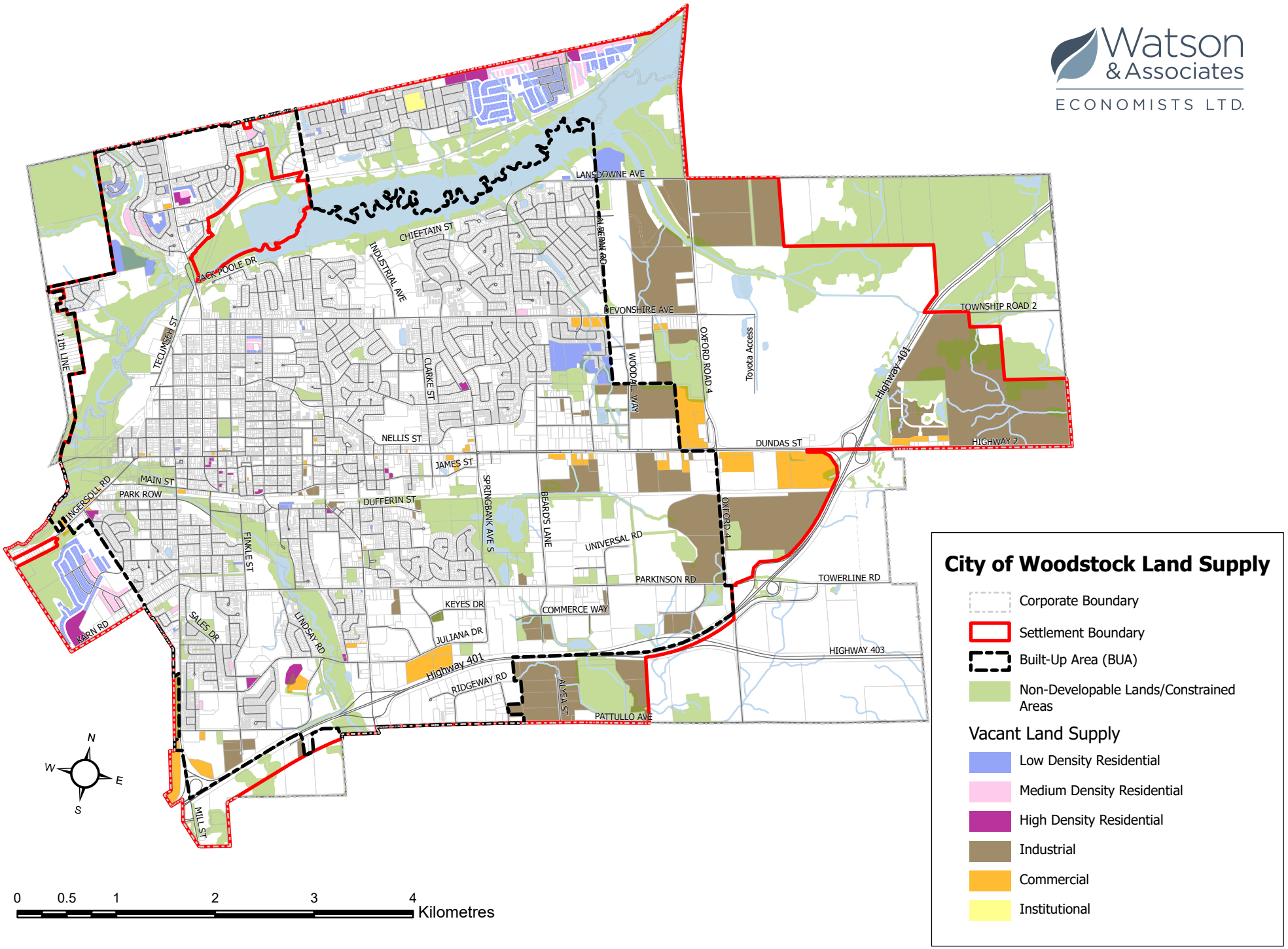
Town of Tillsonburg Land Supply

- Settlement Boundary
- Built-Up Area (BUA)
- Non-Developable Lands/Constrained Areas

Vacant Land Supply

- Low Density Residential
- Medium Density Residential
- High Density Residential
- Mixed Density Residential
- Industrial Land
- Commercial Land




Watson & Associates ECONOMISTS LTD.
City of Woodstock Land Supply
Corporate Boundary
Settlement Boundary
Built-Up Area (BUA)
Non-Developable Lands/Constrained Areas
Vacant Land Supply
Low Density Residential
Medium Density Residential
High Density Residential
Industrial
Commercial
Institutional
LANSDOWNE AVE
CHIEFTAIN ST
INDUSTRIAL AVE
ALBERT RD
DEVONSHIRE AVE
TOWNSHIP ROAD 2
OXFORD ROAD 4
Toyota Access
Highway 401
WOODALL WAY
CLARKE ST
TECUMSEH ST
11th LINE
JACK POOLE DR
NELLIS ST
DUNDAS ST
HIGHWAY 2
JAMES ST
MAIN ST
PARK ROW
INGERSOLL RD
DUFFERIN ST
SPRINGBANK AVE S
BEARD'S LANE
UNIVERSAL RD
PARKINSON RD
TOWERLINE RD
FINKLE ST
KEYES DR
COMMERCE WAY
SALES DR
LINDSAY RD
JULIANA DR
KARN RD
HIGHWAY 403
Highway 401
RIDGEWAY RD
ALYEA ST
PATTULLO AVE
MILL ST
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3
4
Kilometres

Appendix F
Detailed Residential Land Needs by Area Municipality

Appendix F: Detailed Residential Land Needs by Area Municipality

Figure F-1
City of Woodstock
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	3,735	1,453	2,013	7,201
2024-2049	B	4,690	1,959	2,209	8,858
2024-2054	C	5,598	2,496	2,418	10,512
Designated Greenfield Supply (Units)					
Vacant Supply	D	1,336	724	714	2,774
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	-2,399	-729	-1,299	-4,427
2024-2049	F = D - B	-3,354	-1,235	-1,495	-6,084
2024-2054	G = D - C	-4,262	-1,772	-1,704	-7,738
Greenfield Housing Unit Per Hectare Assumptions					
Units Per Ha (Net)	H	23	42	80	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	-104	-17	-16	-138
2024-2049	J = F / H	-146	-29	-19	-194
2024-2054	K = G / H	-185	-42	-21	-249
Greenfield Land Needs, Gross-to-Net (55% Residential / 45% Other)					
2024-2044	L = I / 55%	-190	-32	-30	-251
2024-2049	M = J / 55%	-265	-53	-34	-353
2024-2054	N = K / 55%	-337	-77	-39	-452
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				0
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				-251
2024-2049	Q = M + O				-353
2024-2054	R = N + O				-452

Notes: Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-2
Town of Ingersoll
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	933	207	394	1,534
2024-2049	B	1,099	250	503	1,853
2024-2054	C	1,242	297	625	2,164
Designated Greenfield Supply (Units)					
Vacant Supply		588	775	0	1,363
B.U.A. Approved Supply (Excess)		0	0	423	423
Total Adjusted Vacant Supply	D	588	775	423	1,786
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	-345	568	29	252
2024-2049	F = D - B	-511	525	-80	-67
2024-2054	G = D - C	-654	478	-202	-378
Greenfield Housing Unit Per Hectare Assumptions					
Units Per Ha (Net)	H	23	42	80	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	-15	14	0	-1
2024-2049	J = F / H	-22	12	-1	-11
2024-2054	K = G / H	-28	11	-3	-20
Greenfield Land Needs, Gross-to-Net (55% Residential / 45% Other)					
2024-2044	L = I / 55%	-27	25	1	-2
2024-2049	M = J / 55%	-40	23	-2	-20
2024-2054	N = K / 55%	-52	21	-5	-36
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				0
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				-2
2024-2049	Q = M + O				-20
2024-2054	R = N + O				-36

Notes:
[1] B.U.A. Approved Supply (Excess) refers to the additional housing units that have been approved, beyond the forecast amount for intensification.
Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-3
Town of Tillsonburg
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	2,602	784	341	3,727
2024-2049	B	3,141	1,029	384	4,554
2024-2054	C	3,638	1,288	442	5,368
Designated Greenfield Supply (Units)					
Vacant Supply	D	1,359	1,020	1,385	3,764
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	-1,243	236	1,044	37
2024-2049	F = D - B	-1,782	-9	1,001	-790
2024-2054	G = D - C	-2,279	-268	943	-1,604
Greenfield Housing Unit Per Ha Assumptions					
Units Per Ha (Net)	H	23	42	80	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	-54	6	13	-35
2024-2049	J = F / H	-77	0	13	-65
2024-2054	K = G / H	-99	-6	12	-94
Greenfield Land Needs, Gross-to-Net (55% Residential / 45% Other)					
2024-2044	L = I / 55%	-98	10	24	-64
2024-2049	M = J / 55%	-141	-0.4	23	-119
2024-2054	N = K / 55%	-180	-12	21	-170
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				0
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				-64
2024-2049	Q = M + O				-119
2024-2054	R = N + O				-170

Notes: Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-4
Township of Zorra
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	630	102	105	837
2024-2049	B	717	159	170	1,046
2024-2054	C	774	230	254	1,258
Designated Greenfield Supply (Units)					
Vacant Supply		464	327	0	791
B.U.A. Approved Supply (Excess) [1]		0	394	234	628
Total Adjusted Vacant Supply	D	464	721	234	1,419
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	-166	619	129	582
2024-2049	F = D - B	-253	562	64	373
2024-2054	G = D - C	-310	491	-20	161
Greenfield Housing Unit Per Ha Assumptions					
Units Per Ha (Net)	H	19	35	50	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	-9	18	3	12
2024-2049	J = F / H	-13	16	1	4
2024-2054	K = G / H	-16	14	0	-3
Greenfield Land Needs, Gross-to-Net (60% Residential / 40% Other)					
2024-2044	L = I / 60%	-15	29	4	19
2024-2049	M = J / 60%	-22	27	2	7
2024-2054	N = K / 60%	-27	23	-1	-4
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				20
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				39
2024-2049	Q = M + O				27
2024-2054	R = N + O				16

Notes:
[1] B.U.A. Approved Supply (Excess) refers to the additional housing units that have been approved, beyond the forecast amount for intensification.
Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-5
Township of Norwich
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	549	105	280	934
2024-2049	B	713	145	303	1,161
2024-2054	C	868	189	333	1,390
Designated Greenfield Supply (Units)					
Vacant Supply	D	222	12	138	372
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	-327	-93	-142	-562
2024-2049	F = D - B	-491	-133	-165	-789
2024-2054	G = D - C	-646	-177	-195	-1,018
Greenfield Housing Unit Per Ha Assumptions					
Units Per Ha (Net)	H	19	35	50	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	-17	-3	-3	-23
2024-2049	J = F / H	-26	-4	-3	-33
2024-2054	K = G / H	-34	-5	-4	-43
Greenfield Land Needs, Gross-to-Net (60% Residential / 40% Other)					
2024-2044	L = I / 60%	-29	-4	-5	-38
2024-2049	M = J / 60%	-43	-6	-6	-55
2024-2054	N = K / 60%	-57	-8	-7	-72
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				29
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				-9
2024-2049	Q = M + O				-26
2024-2054	R = N + O				-43

Notes: Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-6
Township of East Zorra Tavistock
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	779	141	90	1,010
2024-2049	B	974	169	106	1,249
2024-2054	C	1,157	226	111	1,494
Designated Greenfield Supply (Units)					
Vacant Supply	D	259	45	0	304
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	-520	-96	-90	-706
2024-2049	F = D - B	-715	-124	-106	-945
2024-2054	G = D - C	-898	-181	-111	-1,190
Greenfield Housing Unit Per Ha Assumptions					
Units Per Ha (Net)	H	19	35	50	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	-27	-3	-2	-32
2024-2049	J = F / H	-38	-4	-2	-43
2024-2054	K = G / H	-47	-5	-2	-55
Greenfield Land Needs, Gross-to-Net (60% Residential / 40% Other)					
2024-2044	L = I / 60%	-46	-5	-3	-53
2024-2049	M = J / 60%	-63	-6	-3	-72
2024-2054	N = K / 60%	-79	-9	-3	-91
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				0
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				-53
2024-2049	Q = M + O				-72
2024-2054	R = N + O				-91

Notes: Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-7
Township of Blandford-Blenheim
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	441	71	60	572
2024-2049	B	541	93	64	698
2024-2054	C	634	117	71	822
Designated Greenfield Supply (Units)					
Vacant Supply	D	509	275	0	784
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	68	204	-60	212
2024-2049	F = D - B	-32	182	-64	86
2024-2054	G = D - C	-125	158	-71	-38
Greenfield Housing Unit Per Ha Assumptions					
Units Per Ha (Net)	H	19	35	50	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	4	6	-1	8
2024-2049	J = F / H	-2	5	-1	2
2024-2054	K = G / H	-7	5	-1	-3
Greenfield Land Needs, Gross-to-Net (60% Residential / 40% Other)					
2024-2044	L = I / 60%	6	10	-2	14
2024-2049	M = J / 60%	-3	9	-2	4
2024-2054	N = K / 60%	-11	8	-2	-6
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				11
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				24
2024-2049	Q = M + O				14
2024-2054	R = N + O				5

Notes: Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-8
Township of South-West Oxford
Residential Land Needs (Gross Developable Hectares)

Period	Calculation	Low Density	Medium Density	High Density	Total
Greenfield Growth (Units)					
2024-2044	A	408	75	0	483
2024-2049	B	503	101	0	604
2024-2054	C	593	130	0	723
Designated Greenfield Supply (Units)					
Vacant Supply	D	285	69	0	354
Designated Greenfield Unit Shortfall (Units)					
2024-2044	E = D - A	-123	-6	0	-129
2024-2049	F = D - B	-218	-32	0	-250
2024-2054	G = D - C	-308	-61	0	-369
Greenfield Housing Unit Per Ha Assumptions					
Units Per Ha (Net)	H	19	35	50	n/a
Designated Greenfield Land Needs, Net Land Area					
2024-2044	I = E / H	-6	0	0	-7
2024-2049	J = F / H	-11	-1	0	-12
2024-2054	K = G / H	-16	-2	0	-18
Greenfield Land Needs, Gross-to-Net (60% Residential / 40% Other)					
2024-2044	L = I / 60%	-11	0	0	-11
2024-2049	M = J / 60%	-19	-2	0	-21
2024-2054	N = K / 60%	-27	-3	0	-30
Future Urban Growth Area/Secondary Plan, Gross Developable, Hectares					
Vacant Supply, ha	O				0
Final Greenfield Area Land Needs, Gross Developable, Hectares					
2024-2044	P = L + O				-11
2024-2049	Q = M + O				-21
2024-2054	R = N + O				-30

Notes: Gross developable land area is based on the land required to accommodate residential development, as well as lands to support the residential uses, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-9
Oxford County
Summary of Residential Land Needs (Gross Developable Hectares)

Municipality	20-Year Land Needs	25-Year Land Needs	30-Year Land Needs
City of Woodstock	-251	-353	-452
Town of Tillsonburg	-64	-119	-170
Township of East Zorra-Tavistock	-53	-72	-91
Township of Norwich	-9	-26	-43
Town of Ingersoll	-2	-20	-36
Township of South-West Oxford	-11	-21	-30
Township of Blandford-Blenheim	24	14	5
Township of Zorra	39	27	16
Oxford County Total (excludes surpluses)	**-390**	**-611**	**-822**

Note: Surpluses (i.e. positive figures) are not counted in the totals.
Source: Watson & Associates Economists Ltd., 2025.

Figure F-10
Oxford County
Summary of Key Residential Land Needs Assumptions

Municipality	Rural Housing Growth Share (%)	Intensification Rate (%)	Greenfield Housing Growth Share (%)	Total Housing Growth (%)	Units Per Ha (U.P.H.), Net Ha	Gross-to Net Factor [1]
City of Woodstock	0%	25%	75%	100%	Low: 23 U.P.H. Medium: 42 U.P.H. High: 80 U.P.H.	55%
Town of Tillsonburg	0%	25%	75%	100%		
Town of Ingersoll	0%	25%	75%	100%		
Township of Zorra	12%	25%	63%	100%	Low: 19 U.P.H. Medium: 35 U.P.H. High: 50 U.P.H.	60%
Township of Norwich	13%	15%	72%	100%		
Township of East Zorra-Tavistock	8%	15%	77%	100%		
Township of Blandford-Blenheim	12%	15%	73%	100%		
South-West Oxford	15%	10%	75%	100%		
Oxford County	3%	23%	74%	100%	-	-

[1] The gross-to-net factor is the assumption that provides a gross developable land area including other land-uses to support residential land needs, including institutional and commercial uses, as well as infrastructure as roads, sidewalks, parks and stormwater ponds.
Note: Based on 30-year period, over 2024 to 2054 planning horizon.
Source: Watson & Associates Economists Ltd., 2025.

Appendix G
Detailed Employment Area Land Needs by Area Municipality

Appendix G: Detailed Employment Land Needs by Area Municipality

Figure G-1 provides a summary of the Employment Area land supply by Area Municipality. This supply only includes Employment Area lands within the Urban Centres and fully serviced settlement areas in the Townships. The Employment Area land supply has been adjusted on net basis with a further reduction of 15% for long-term vacancy. A long-term land vacancy adjustment of is applied to account for lands that may not develop over the planning horizon for various factors such as marketability, site constraints, parcel configuration, landowner willingness, etc.

Figure G-1
Oxford County
Employment Area Land Supply

Municipality	Employment Supply, Gross Developable	Employment Supply, Net Developable (80%)	Employment Supply, ha Adjusted (15% long-term vacancy)
Woodstock [1]	429	343	291
Tillsonburg	83	67	57
Ingersoll	272	218	185
Zorra	1	1	1
Norwich	23	19	16
East Zorra-Tavistock	4	3	2
Blandford Blenheim	21	17	14
South-West Oxford	16	13	11
Total	848	679	577

[1] There are lands outside of the settlement boundary that have been identified for industrial use through the Southeast Woodstock Secondary Plan. These lands were not included in the employment land supply as they still require additional planning study prior to being brought into the settlement boundary, but would be first priority for any future settlement area boundary expansion for employment uses.
Source: Watson & Associates Economists Ltd., 2025.

Figure G-2 provides a summary of the forecast employment to be allocated on Employment Area lands. The forecast is only for Urban Centres and fully serviced settlement areas. An adjustment has been made to account for an estimated amount of Employment Area growth to be accommodated through intensification. It is assumed that 10% of employment growth in Woodstock, Ingersoll, and Tillsonburg will be accommodated through intensification, while a lower share of 5% is assumed for the serviced settlement areas in the Townships, acknowledging their smaller developed Employment Area base.

Figure G-2
Oxford County
Employment Area Forecast by Municipality

Municipality	Employment			Employment Adjusted for Intensification		
	2024-2044	2024-2049	2024-2054	2024-2044	2024-2049	2024-2054
Woodstock	6,020	7,160	8,250	5,420	6,440	7,430
Tillsonburg	1,340	1,600	1,840	1,210	1,440	1,660
Ingersoll	2,170	2,590	2,980	1,950	2,330	2,680
Zorra	90	110	120	90	100	110
Norwich	160	190	215	150	180	200
East Zorra-Tavistock	150	170	200	140	160	190
Blandford-Blenheim	90	110	120	90	100	110
South-West Oxford	80	90	120	80	90	110
Total	10,100	12,020	13,845	9,130	10,840	12,490

Source: Watson & Associates Economists Ltd., 2025.

Figure G-3 provides a summary of the Employment Area land demand forecast by Area Municipality. An average Employment Area density of 15 jobs per net hectare is utilized for Woodstock, Tillsonburg and Ingersoll, while an Employment Area density of 7 to 10 jobs per hectare is utilized for the serviced settlement areas in the Townships.

Figure G-3
Employment Area Land Demand

Municipality	Employment Adjusted for Intensification			Density (jobs/Net ha)	Land Demand		
	2024-2044	2024-2049	2024-2054		2024-2044	2024-2049	2024-2054
Woodstock	5,420	6,440	7,430	15	361	429	495
Tillsonburg	1,210	1,440	1,660	15	81	96	111
Ingersoll	1,950	2,330	2,680	15	130	155	179
Zorra	90	100	110	7	13	14	16
Norwich	150	180	200	10	15	18	20
East Zorra-Tavistock	140	160	190	10	14	16	19
Blandford-Blenheim	90	100	110	7	13	14	16
South-West Oxford	80	90	110	7	11	13	16
Total	9,130	10,840	12,490	-	638	756	871

Source: Watson & Associates Economists Ltd., 2025.

Figure G-4 provides a summary of the Employment Area land needs by Area Municipality. The Employment Area land demand is compared to the Employment Area supply to determine the Employment Area land needs. The land needs are then adjusted downward to account for Future Growth Areas and Secondary Plans that were not included in the previous designated supply.

Figure G-4
Oxford County
Employment Area Land Needs

Municipality	Land Needs, Net, ha			Land Needs, Gross Developable, ha			Future Growth Area/Secondary Plan Areas	20-Year Land Needs Gross Developable (ha)	25-Year Land Needs Gross Developable (ha)	30-Year Land Needs Gross Developable (ha)
	2024-2044	2024-2049	2024-2054	2024-2044	2024-2049	2024-2054				
Woodstock [1]	-70	-138	-204	-87	-172	-255	4	-83	-168	-251
Tillsonburg	-24	-39	-54	-30	-49	-68	0	-30	-49	-68
Ingersoll	55	30	6	69	37	8	0	Surplus	Surplus	Surplus
Zorra	-12	-14	-15	-15	-17	-19	24	Surplus	Surplus	Surplus
Norwich	1	-2	-4	1	-3	-5	0	Surplus	-3	-5
East Zorra-Tavistock	-12	-14	-17	-14	-17	-21	0	-14	-17	-21
Blandford-Blenheim	1	-0	-2	2	-0	-2	0	Surplus	0	-2
South-West Oxford	-1	-2	-5	-1	-3	-6	0	-1	-3	-6
Total	-	-	-	-	-	-	28	-129	-240	-353

[1] There are lands outside of the settlement boundary that have been identified for industrial use through the Southeast Woodstock Secondary Plan. These lands were not included in the employment land supply as they still require additional planning study prior to being brought into the settlement boundary, but would be first priority for any future settlement area boundary expansion for employment uses.
Source: Watson & Associates Economists Ltd., 2025.

Figures G-5a, G-5b and G-5c illustrate the forecast for rural dry industrial land absorption in Township areas outside serviced villages. It shows potential land take-up for dry industrial uses within unserviced settlement areas and other rural locations. Further discussion of this forecast is provided in Section 9.6.

Figure G-5a
Oxford County
Rural Dry-Industrial Land Absorption Forecast, 20-Year Forecast

Municipality	Dry Industrial Employment	Employment Density (jobs/net hectare)	Dry Industrial Land Demand, Net Land Area (hectares)	Dry Industrial Land Demand, Gross Developable (hectares)
Blandford-Blenheim	140	4	35	44
East Zorra-Tavistock	30	4	8	9
Norwich	30	4	8	9
South-West Oxford	30	4	8	9
Zorra	30	4	8	9
Total	**260**	**4**	**65**	**81**

Figure G-5b
Oxford County
Rural Dry-Industrial Land Absorption Forecast, 25-Year Forecast

Municipality	Dry Industrial Employment	Employment Density (jobs/net hectare)	Dry Industrial Land Demand, Net Land Area (hectares)	Dry Industrial Land Demand, Gross Developable (hectares)
Blandford-Blenheim	170	4	43	53
East Zorra-Tavistock	30	4	8	9
Norwich	40	4	10	13
South-West Oxford	40	4	10	13
Zorra	30	4	8	9
Total	**310**	**4**	**78**	**97**

Figure G-5c
Oxford County
Rural Dry-Industrial Land Absorption Forecast, 25-Year Forecast

Municipality	Dry Industrial Employment	Employment Density (jobs/net hectare)	Dry Industrial Land Demand, Net Land Area (hectares)	Dry Industrial Land Demand, Gross Developable (hectares)
Blandford-Blenheim	190	4	48	59
East Zorra-Tavistock	40	4	10	13
Norwich	50	4	13	16
South-West Oxford	50	4	13	16
Zorra	40	4	10	13
Total	**370**	**4**	**93**	**116**

Note: Gross developable is based on an upward adjustment of 20%.
Source: Watson & Associates Economists Ltd., 2025.

Appendix H
Nodes and Corridor

OXFORD GMS

NODES AND CORRIDOR BOUNDARY

WOODSTOCK

FIGURE #1-3

Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Highway
- Major Road
- Minor Road

SCALE 1:25,000

0 500 1,000 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

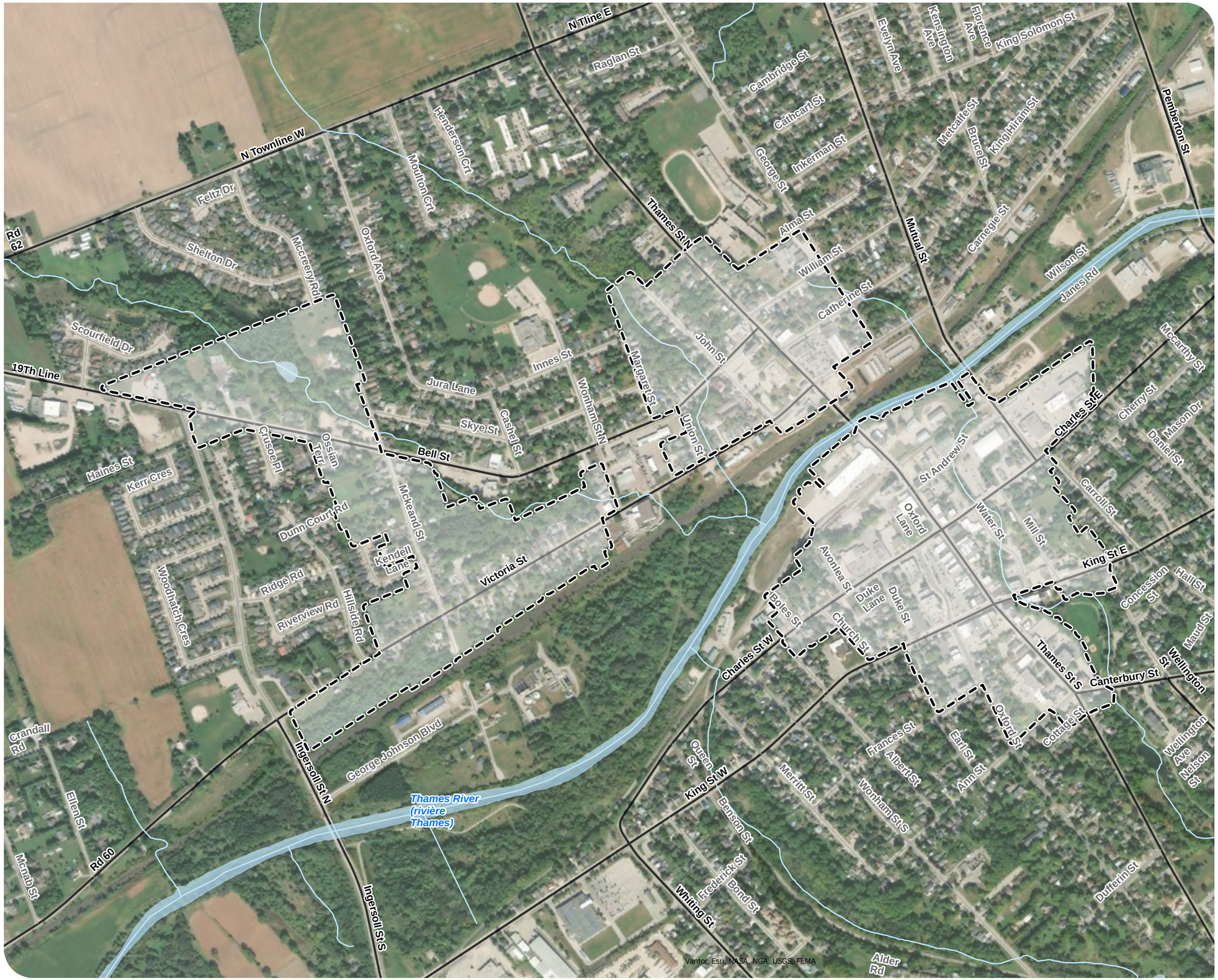
MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712
STATUS: DRAFT
DATE: 27/11/2025

Vantor, Esri, NASA, NGA, USGS, FEMA

FILE LOCATION: K:\2024\247712\Product\Client\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping.aprx



OXFORD GMS

NODES AND CORRIDOR BOUNDARY

INGERSOLL

FIGURE #1-1

- Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Major Road
- Minor Road

SCALE 1:8,000

0 160 320 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
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PROJECT: 24-7712
STATUS: DRAFT
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OXFORD GMS

NODES AND CORRIDOR BOUNDARY

TILLSONBURG

FIGURE #1-2

Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Major Road
- Minor Road

SCALE 1:14,000

0 280 560 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

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MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

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OXFORD GMS

NODES AND CORRIDOR BOUNDARY

NORWICH

FIGURE #1-5

- Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Major Road
- Minor Road

SCALE 1:3,000

0 70 140 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712
STATUS: DRAFT
DATE: 27/11/2025

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OXFORD GMS

NODES AND CORRIDOR BOUNDARY

INNERKIP

FIGURE #1-3

- Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Major Road
- Minor Road

SCALE 1:4,000

0 90 180 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712
STATUS: DRAFT
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Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Region of Waterloo, Vantor, Sources: Esri, Maxar, Airbus DS, USGS, NGA, NASA, CGIAR, N Robinson, NCEAS, NLS, OS, NMA, Geodatastyrelsen, Rijkswaterstaat, GSA, Geoland, FEMA, Intermap,

OXFORD GMS

NODES AND CORRIDOR BOUNDARY

TAVISTOCK

FIGURE #1-7

- Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Major Road
- Minor Road

SCALE 1:5,000

0 120 240 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712
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OXFORD GMS

NODES AND CORRIDOR BOUNDARY

THAMESFORD

FIGURE #1-8

- Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Major Road
- Minor Road

SCALE 1:5,000

0 120 240 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712
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OXFORD GMS

NODES AND CORRIDOR BOUNDARY

EMBRO

FIGURE #1-2

Nodes and Corridor Boundary

Base Data

- Watercourse
- Major Road
- Minor Road

SCALE 1:2,000

0 40 80 m

N
W E
S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712
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OXFORD GMS

NODES AND CORRIDOR BOUNDARY

MOUNT ELGIN

FIGURE #1-4

Nodes and Corridor Boundary

Base Data

- Highway
- Major Road
- Minor Road

SCALE 1:1,000

0 20 40 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

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MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

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PROJECT: 24-7712
STATUS: DRAFT
DATE: 27/11/2025

FILE LOCATION: K:\2024\247712\Product\Client\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping.aprx

OXFORD GMS

NODES AND CORRIDOR BOUNDARY

PLATTSVILLE

FIGURE #1-6

- Nodes and Corridor Boundary

Base Data

- Water Body
- Watercourse
- Major Road
- Minor Road

SCALE 1:4,000

0 90 180 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712

STATUS: DRAFT

DATE: 27/11/2025

FILE LOCATION: K:\2024\247712\Product\Client\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping.aprx

OXFORD GMS

NODES AND CORRIDOR BOUNDARY

DRUMBO

FIGURE #1-1

Nodes and Corridor Boundary

Base Data

Major Road

Minor Road

SCALE 1:2,000

0 40 80 m

N

W E

S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNRF, CLIENT

MAP CREATED BY: RMT
MAP CHECKED BY: AN
MAP PROJECTION: NAD 1983 UTM Zone 17N

DILLON CONSULTING

PROJECT: 24-7712

STATUS: DRAFT

DATE: 27/11/2025

FILE LOCATION: K:\2024\247712\Product\Client\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping\247712_Oxford_GMS_Mapping.aprx