Chapter 3
Anticipated Development in the County of Oxford

3. Anticipated Development in the County of Oxford

3.1 Requirement of the Act

Chapter 4 provides the methodology for calculating a D.C. as per the D.C.A. Figure 4-1 presents this methodology graphically. It is noted in the first box of the schematic that in order to determine the D.C. that may be imposed, it is a requirement of Section 5 (1) of the D.C.A. that "the anticipated amount, type and location of development, for which development charges can be imposed, must be estimated."

The growth forecast contained in this chapter (with supplemental tables in Appendix A) provides for the anticipated development for which the County will be required to provide services, over a 10-year (2019-2029) and a longer term (2019-2041) time horizon.

3.2 Basis of Population, Household and Non-Residential Gross Floor Area Forecast

In compiling the growth forecast, the following specific information sources were consulted to assess the residential and non-residential development potential for Oxford County over the forecast period, including:

- Oxford County Phase One Comprehensive Review: Population, Housing and Employment Forecast and Area Municipality Growth Allocations (Updated) January 23, 2019;
- Historical residential and non-residential building permit data for 2007 to 2018 period; and
- Available Census data regarding population, housing and employment.
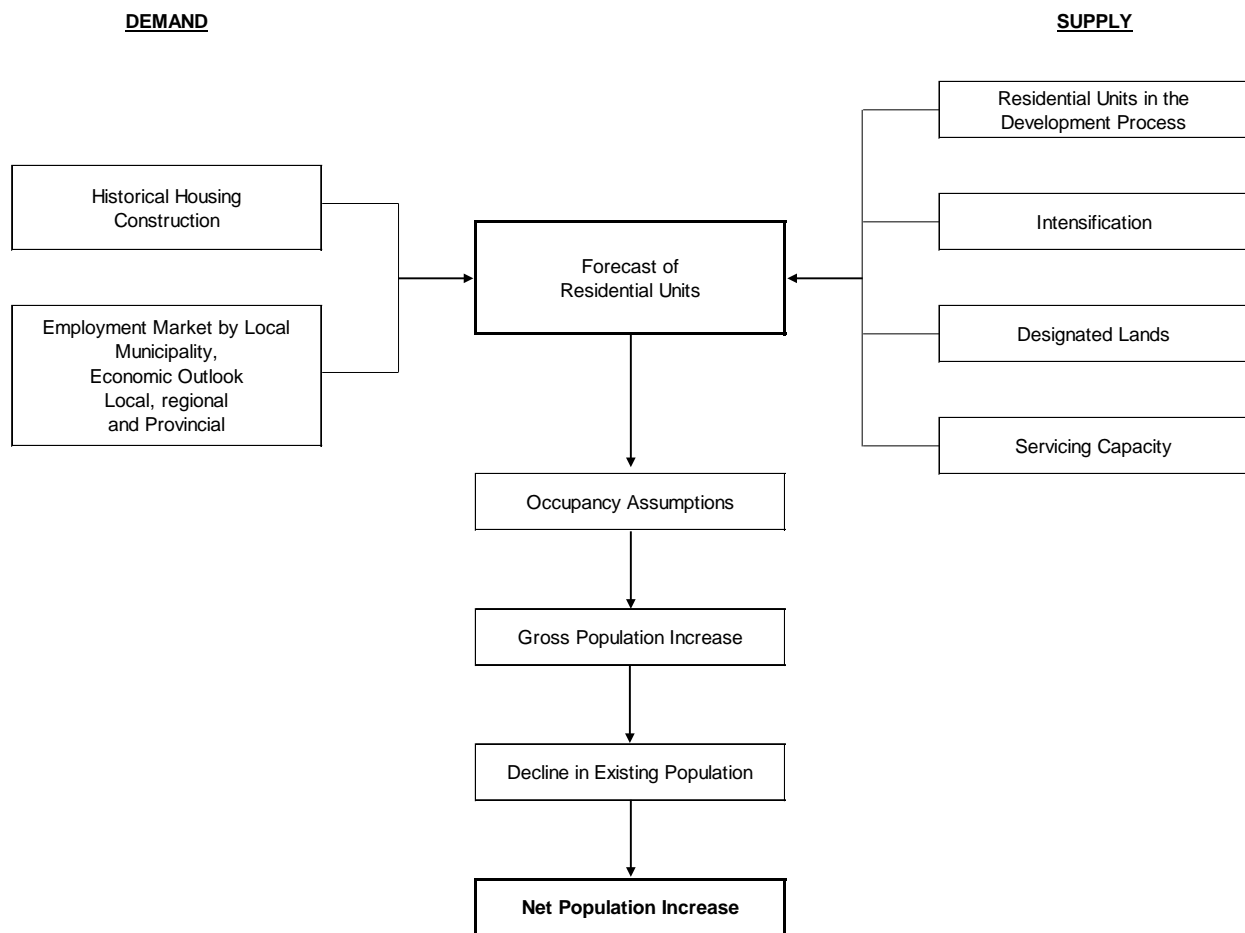
3.3 Summary of Growth Forecast

A detailed analysis of the residential and non-residential growth forecasts is provided in Appendix A and the methodology employed is illustrated in Figure 3-1. The discussion provided herein summarizes the anticipated growth for the County and describes the

basis for the forecast. The results of the residential growth forecast analysis are summarized in Table 3-1 below, and *Schedule 1* in Appendix A.

As identified in Table 3-1 and *Schedule 1*, the County's population is anticipated to reach approximately 131,510 by 2029 and 149,580 by 2041, resulting in an increase of approximately 15,400 and 33,460 persons, respectively, over the 10-year and longer term forecast periods.[1]

Figure 3-1
Population and Household Projection Model

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[1] The population figures used in the calculation of the 2014 D.C. exclude the net Census undercount, which is estimated at approximately 4%.

Table 3-1
County of Oxford
Residential Growth Forecast Summary

	Year	Population (Including Census Undercount)[1]	Excluding Census Undercount			Housing Units						Person Per Unit (P.P.U.): Total Population/ Total Households
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings[2]	Apartments[3]	Other	Total Households	Equivalent Institutional Households	
Historical	Mid 2006	105,570	102,756	1,696	101,060	30,845	2,965	5,145	375	39,330	1,546	2.613
	Mid 2011	108,620	105,719	1,609	104,110	32,463	3,133	5,453	505	41,554	1,466	2.544
	Mid 2016	113,900	110,862	1,707	109,155	34,275	3,465	6,185	335	44,260	1,551	2.505
Forecast	Mid 2019	119,300	116,117	1,762	114,355	35,859	3,777	6,623	335	46,594	1,594	2.492
	Mid 2024	127,500	124,096	1,901	122,195	38,133	4,284	7,275	335	50,026	1,719	2.481
	Mid 2029	135,120	131,512	2,034	129,478	40,148	4,792	7,891	335	53,166	1,839	2.474
	Mid 2031	138,100	134,418	2,090	132,328	40,955	4,999	8,142	335	54,430	1,890	2.470
	Mid 2041	153,680	149,581	2,349	147,232	44,555	5,869	9,312	335	60,070	2,126	2.490
Incremental	Mid 2006 - Mid 2011	3,050	2,963	-87	3,050	1,618	168	308	130	2,224	-79	
	Mid 2011 - Mid 2016	5,280	5,143	98	5,045	1,812	332	732	-170	2,706	89	
	Mid 2016 - Mid 2019	5,400	5,255	55	5,200	1,584	312	438	0	2,334	50	
	Mid 2019 - Mid 2024	8,200	7,979	139	7,840	2,274	507	652	0	3,432	126	
	Mid 2019 - Mid 2029	15,820	15,395	272	15,123	4,289	1,015	1,268	0	6,572	247	
	Mid 2019 - Mid 2031	18,800	18,301	328	17,973	5,096	1,222	1,519	0	7,836	298	
	Mid 2019 - Mid 2041	34,380	33,464	587	32,877	8,696	2,092	2,689	0	13,476	533	

Source: Derived from County of Oxford - Phase One Comprehensive Review, Population, Housing and Employment Forecasts and Area Municipal Growth Allocations (Updated), January, 2019, by Watson & Associates Economists Ltd., 2019.
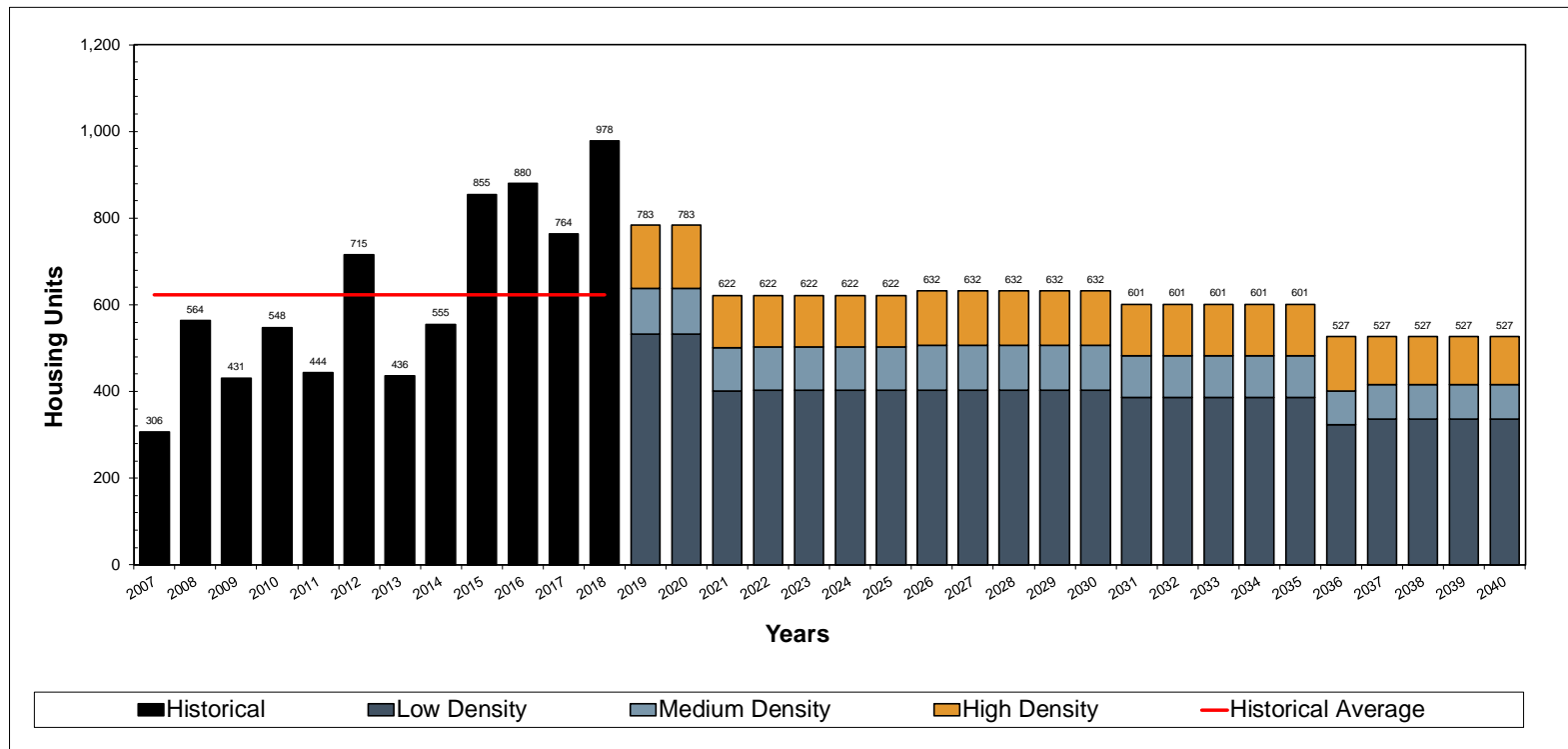[1] Census undercount estimated at approximately 2.7%. Note: Population including the undercount has been rounded.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure 3-2
County of Oxford
Annual Housing Forecast

Source: Historical housing activity from Oxford County Planning Department, 2007-2018.
[1] Growth forecast represents calendar year.

Provided below is a summary of the key assumptions and findings regarding the County of Oxford D.C. growth forecast update.

1. Unit Mix (Appendix A – Schedules 1, 2, and 6)

   - The unit mix for the County was derived from the Oxford County Phase One Comprehensive Review, as well as historical development activity (as per Schedule 6);
   - Based on the above indicators, the 2019 to 2041 household growth forecast is comprised of a unit mix of 65% low density (single detached and semi-detached), 15% medium density (multiples except apartments) and 20% high density (bachelor, 1-bedroom and 2-bedroom apartments).

2. Geographic Location of Residential Development (Appendix A – Schedules 2a and 2b)

   - Schedule 2a summarizes the anticipated amount, type and location of development for County by area municipality; and
   - The percentage of forecast housing growth between 2019 and 2041 by development location is summarized below.

Development Location	Percentage Housing Growth, 2019-2041
City of Woodstock	51.1%
Town of Tillsonburg	13.1%
Township of Ingersoll	12.1%
Township of Blandford-Blenheim	4.2%
Township of Norwich	5.9%
Township of East Zorra-Tavistock	7.2%
Township of Zorra	3.4%
Township of South-West Oxford	3.0%
Total	100%

3. Planning Period

- Short and longer-term time horizons are required for the D.C. process. The D.C.A. limits the planning horizon for certain services, such as parks, recreation and libraries, to a 10-year planning horizon. Services related to a highway, public works, fire, police, stormwater, water and wastewater services utilize a longer planning period.

4. Population in New Units (Appendix A - Schedules 2 through 5)

- The number of permanent housing units to be constructed in Oxford County during the short- and long-term periods is presented on Figure 3-2. Over the 10-year and longer term forecast periods, the County is anticipated to average of approximately 657 and 613 new housing units per year, respectively.
- Institutional population[1] is anticipated to grow by approximately 590 persons between 2019 and 2041.
- Population in new units is derived from Schedules 3, 4, and 5, which incorporate historical development activity, anticipated units (see unit mix discussion) and average persons per unit by dwelling type for new units.
- Schedule 8a summarizes the P.P.U. for the new housing units by age and type of dwelling based on a 2016 custom Census data. The total calculated P.P.U. for all density types has been adjusted to account for the P.P.U. trends which has been recently experienced in both new and older units. Adjusted 25-year average P.P.U.s by dwelling type are as follows:
    - Low density: 3.061
    - Medium density: 1.923
    - High density: 1.539
    - Institutional density: 1.101

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[1] Institutional includes special care facilities such as nursing home or residences for senior citizens. A P.P.U. of 1.101 depicts 1-bedroom and 2 or more-bedroom units in these special care facilities.

5. Existing Units and Population Change (Appendix A - Schedules 3, 4 and 5)

- Existing households for 2019 are based on the 2016 Census households, plus estimated residential units constructed between 2017 and 2018 assuming a 6-month lag between construction and occupancy (see Schedule 3).

- The decline in average occupancy levels for existing housing units is calculated in Schedules 3 through 5, by aging the existing population over the forecast period. The forecast population decline in existing households over the 10-year and longer term forecast period is approximately 1,910 and 1,900, respectively

6. Employment (Appendix A, Schedules 9a, 9b, 9c and 11)

- Employment projections are largely based on the activity rate method, which is defined as the number of jobs in a municipality divided by the number of residents. Key employment sectors include primary, industrial, commercial/ population-related, institutional, and work at home, which are considered individually below.

- 2016 employment data (place of work) for Oxford County is outlined in Schedule 9a. The 2016 employment base is comprised of the following sectors:

  o 1,360 primary (3%);
  o 4,810 work at home employment (9%);
  o 23,278 industrial (45%);
  o 14,468 commercial/population related (28%); and
  o 7,655 institutional (15%).

- The 2016 employment by usual place of work, including work at home, is estimated at 51,570. An additional 5,750 employees have been identified for the County in 2016 that have no fixed place of work (N.F.P.O.W.).[1]

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[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."

The 2016 employment base, including N.F.P.O.W., totals approximately 57,320.

- Total employment, including work at home and N.F.P.O.W., for Oxford County is anticipated to reach 66,145 by 2029, and 74,120 by 2041. This represents an employment increase of approximately 5,980 for the 10-year forecast period, and 13,950 for the longer term forecast period.

- Schedule 9b, Appendix A, summarizes the employment forecast, excluding work at home employment and N.F.P.O.W. employment, which is the basis for the D.C. employment forecast. The impact on municipal services from these employees has already been included in the population forecast. The impacts on municipal services regarding N.F.P.O.W. employees are less clear, given the transient nature of these employees. Furthermore, since these employees have no fixed work address, they cannot be captured in the non-residential gross floor area (G.F.A.) calculation. Accordingly, work at home and N.F.P.O.W. employees have been removed from the D.C. calculation.

- Total employment for the County (excluding work at home and N.F.P.O.W. employment) is anticipated to reach approximately 54,000 by 2029 and 60,510 by 2041. This represents an employment increase of approximately 4,860 and 11,370 over the 10-year and longer term forecast periods, respectively.

7. Non-Residential Sq.m. Estimates G.F.A. (Appendix A, Schedule 9b)

- Square meter estimates were calculated in Schedule 10b based on the following employee density assumptions:
    - 139 sq.m. per employee for industrial;
    - 51 sq.m. per employee for commercial/population-related; and
    - 65 sq.m. per employee for institutional employment.
- The County-wide incremental G.F.A. increase is anticipated to be 462,800 sq.m. over the 10-year forecast period and 1.1 million sq.m. over the longer term forecast period.
- In terms of percentage growth, the longer term incremental G.F.A. forecast by sector is broken down as follows:
    - industrial – 81%;

- o commercial/population-related – 13%; and
- o institutional – 6%.

- The percentage of forecast employment growth between 2019 and 2041 by development location is summarized below.

Development Location	Percentage Employment Growth, 2019-2041
City of Woodstock	65.9%
Town of Tillsonburg	10.7%
Township of Ingersoll	15.7%
Township of Blandford-Blenheim	1.1%
Township of Norwich	2.3%
Township of East Zorra-Tavistock	2.5%
Township of Zorra	0.9%
Township of South-West Oxford	0.9%
Total	100%