

County of Oxford

Comprehensive Review (Phase 1)

Presentation to Oxford County Council Phase One Comprehensive Review Draft Report



Wednesday, April 10th, 2019

HEMSON
Consulting Ltd.

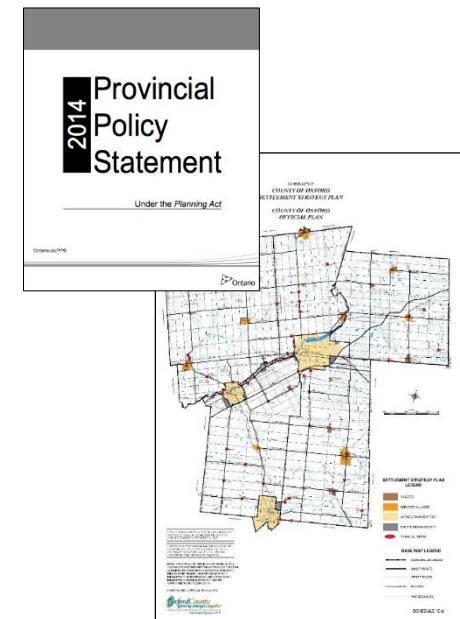
**OxfordCounty**
Growing stronger together

Today we will discuss...

- Phase One Comprehensive Report:
 - Policy framework and study purpose
 - Recent growth and change
 - County-wide outlook
 - Area Municipal allocations
 - Land needs assessment

Policy Context and Study Purpose

- Study purpose
 - Update and extend County growth outlook to 2046
 - Forecast population, housing and employment growth in Area Municipalities and assess land need from 2019 to 2039
 - Establish basis for updates to *Oxford County Official Plan* as well as land use planning, servicing, and financial planning studies
- Study Undertaken in Context of Planning Policy Framework
 - Provincial Policy Statement (PPS), 2014 – provides provincial direction for managing growth and land uses, including directing most growth to serviced settlement areas
 - Oxford County Official Plan – implements PPS for Oxford and its Area Municipalities; currently projects growth to 2036



Recent Residential Growth in Oxford Higher than Historical Trends

- Census indicated very high growth 2011-2016, relative to past trends

Historical Population and Net In-Migration County of Oxford, 2001-2016				
Census Year	Total Population (Including Census Net Undercoverage)	Population Growth		Net In-Migration
		Net Change	Compound Annual Growth Rate	
2001	103,200			
2006	106,600	3,400	0.65%	2,250
2011	108,700	2,100	0.39%	2,050
2016	113,900	5,200	0.94%	3,710

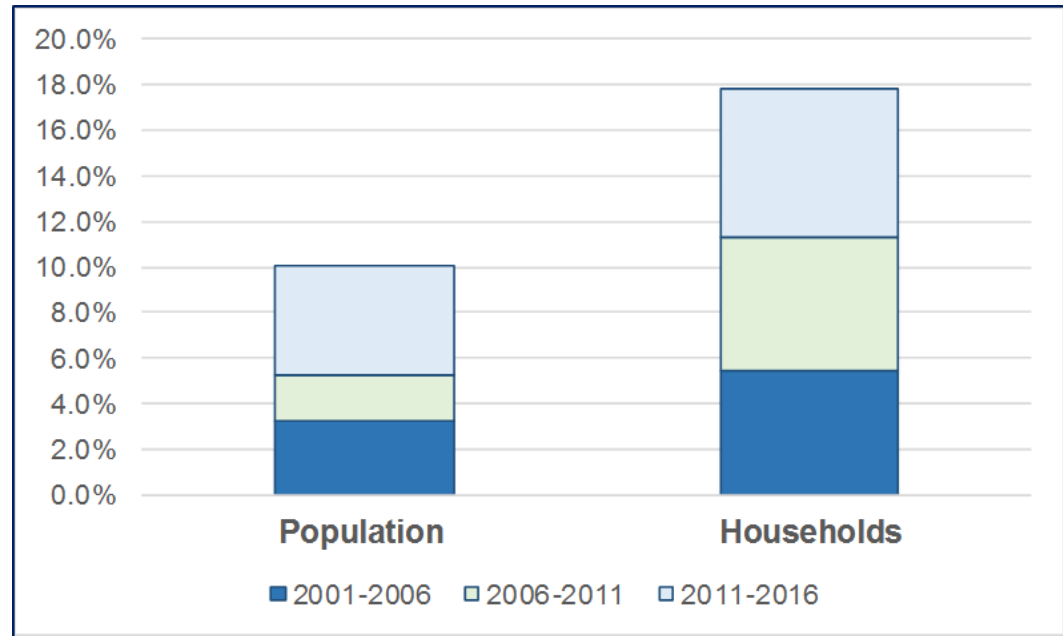
- Building activity suggests high growth will continue in the short-term

Historical Household Growth County of Oxford, 2001-2016			
Census Year	Households	Household Growth	
		Net Change	Compound Annual Growth Rate
2001	37,270		
2006	39,310	2,040	1.1%
2011	41,560	2,250	1.1%
2016	44,270	2,710	1.3%

Residential Growth Highlights Demographic Changes

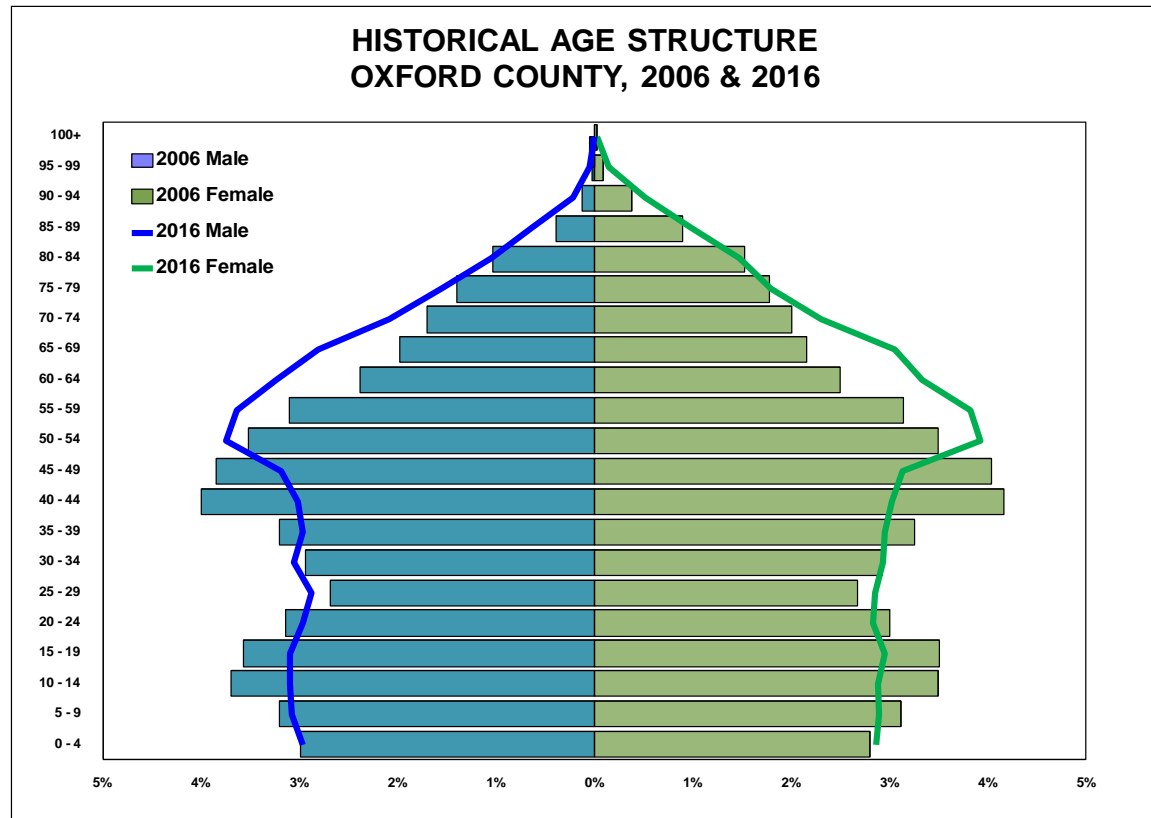
- Household growth outpacing growth in population
- Largely due to aging population and resulting decline in average household size

Average Household Size, Oxford County, 2001-2016	
Year	Persons per unit (ppu)
2001	2.62
2016	2.57
2011	2.50
2016	2.47



Oxford Population is Aging

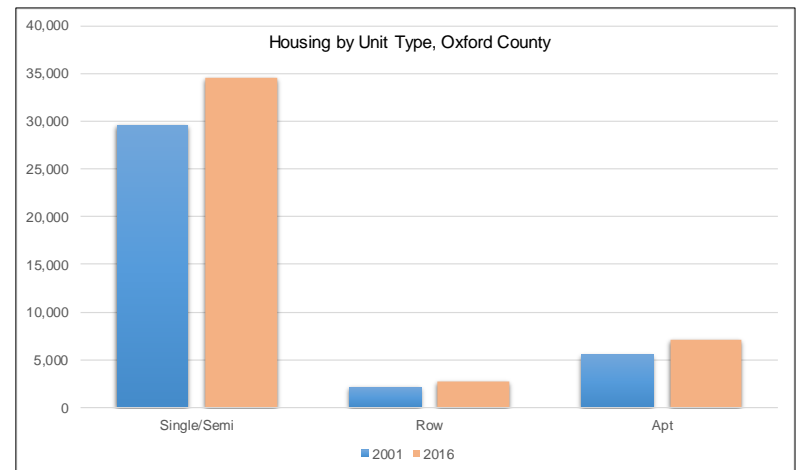
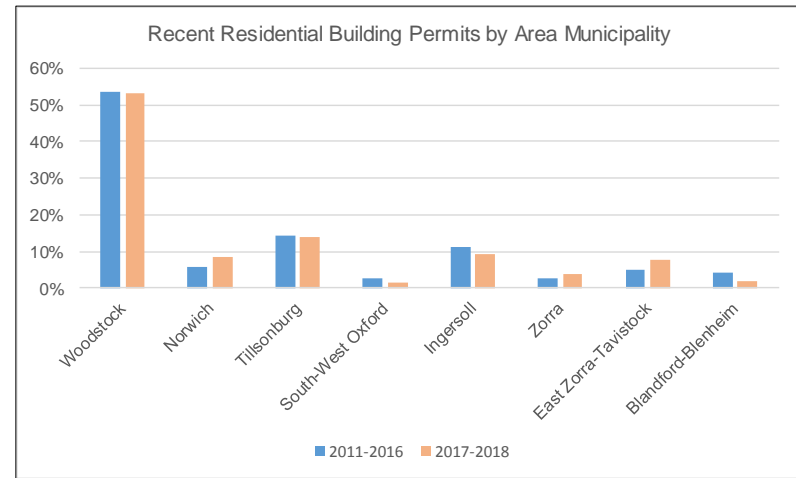
- Aging of the baby boom drives overall aging
- Out-migration of millennials also affects age structure
- Without in-migration, aging population combined with low fertility rates will cause population decline



Source: Hemson Consulting Ltd. based on Statistics Canada data.

General Pattern of Housing Continues

- Recent building activity has reinforced long-standing settlement patterns in Oxford
- Housing dominated by low density “ground-oriented” units, owing to the rural character of many communities



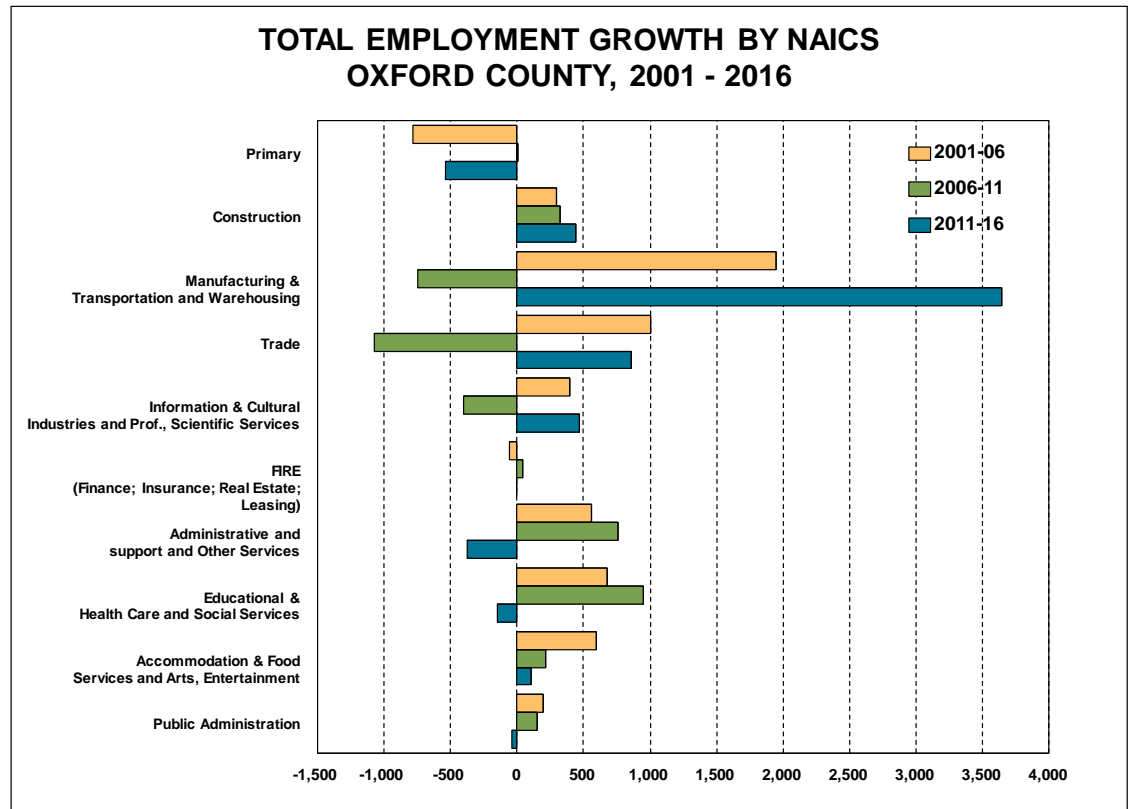
Recent Employment Growth Strong Compared to Other Industrial Centres

- Relatively steady job growth County-wide since 2001, with variation at the Area Municipal level
 - As with population and housing, most employment growth was in Woodstock
 - Other Area Municipalities, especially Ingersoll and Southwest Oxford, have also experienced job growth (albeit slower)
- County shows strong job performance in context of southwestern Ontario

Historical Total Place of Work Employment Oxford County, 2001-2016				
Year	Employment	Net Change	Growth Rate	Activity Rate
2001	48,080			
2006	52,960	4,880	1.95%	48.4%
2011	53,140	180	0.07%	51.5%
2016	57,330	4,190	1.53%	50.3%

Oxford Employment Growth Especially Concentrated in Industrial Activities

- Strong industrial sector, but almost all recent manufacturing growth related to the two auto plants
- Most employment related to providing services to Oxford residents

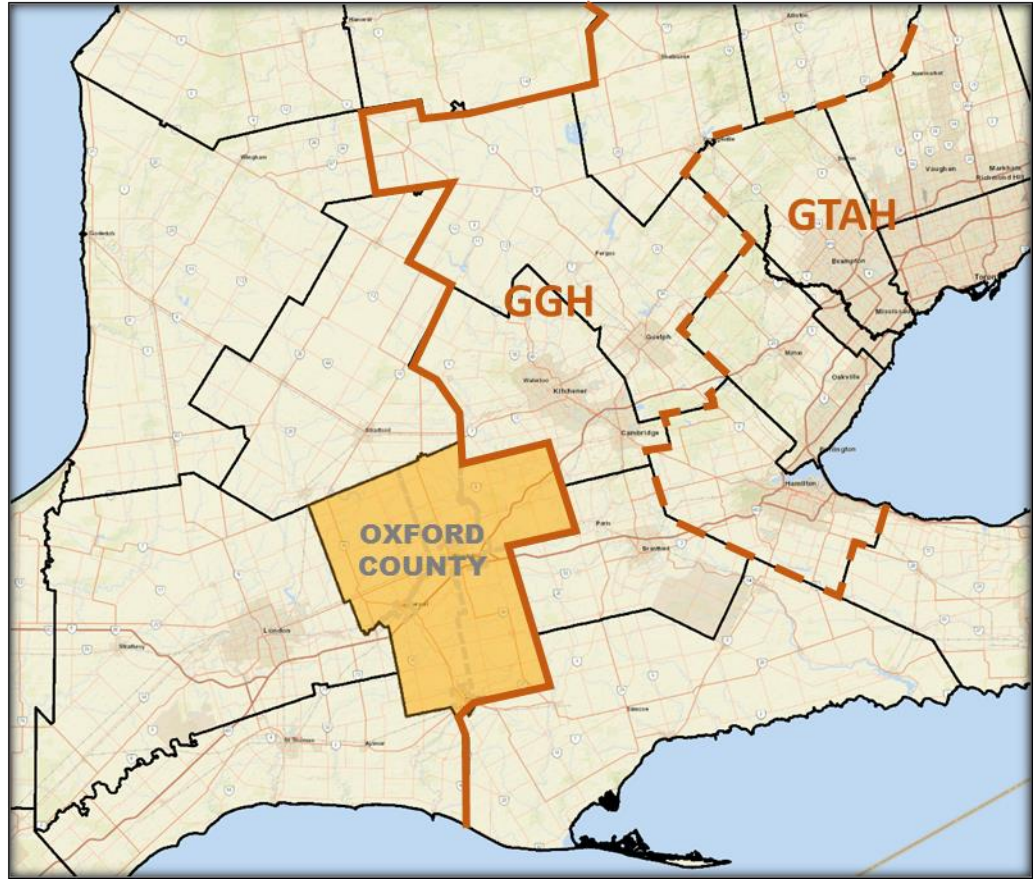


Source: Hemson Consulting Ltd. based on Statistics Canada data.

Oxford's Changing Relationship to GGH

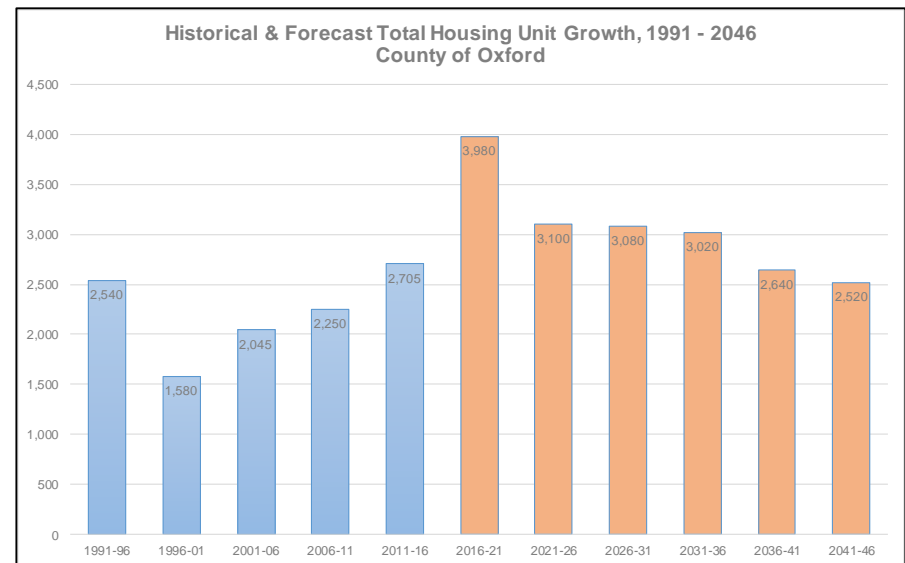
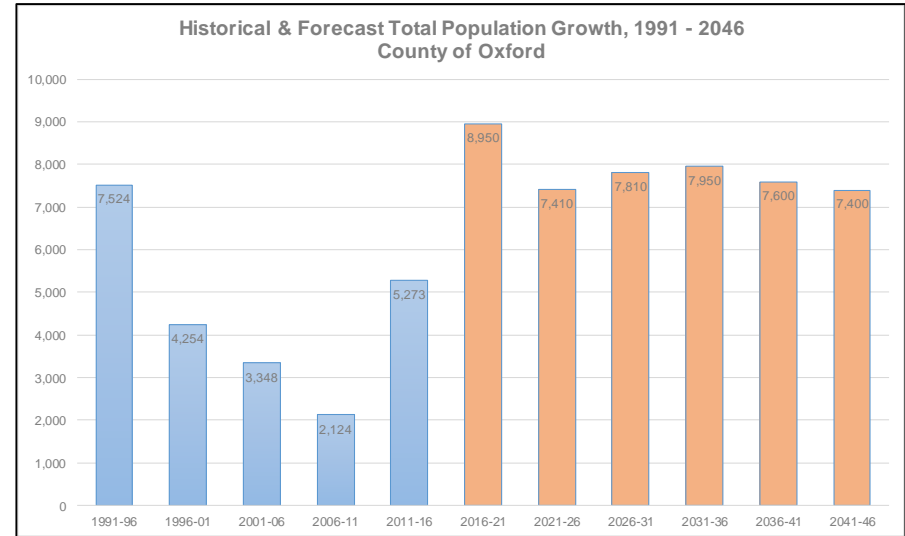
- Recent growth largely driven by migration from Greater Golden Horseshoe
- While most growth concentrated in Woodstock, all Area Municipalities have been growing

Oxford County in a Southern Ontario Context



County Should Plan For Higher Population and Housing Growth

- Forecasts assume:
 - Continued high levels of net immigration from GGH in short and medium term
 - More modest growth in longer term as population continues to age
- Housing still dominated by single and semi-detached units—though expect increasing number of rowhouses and some apartments

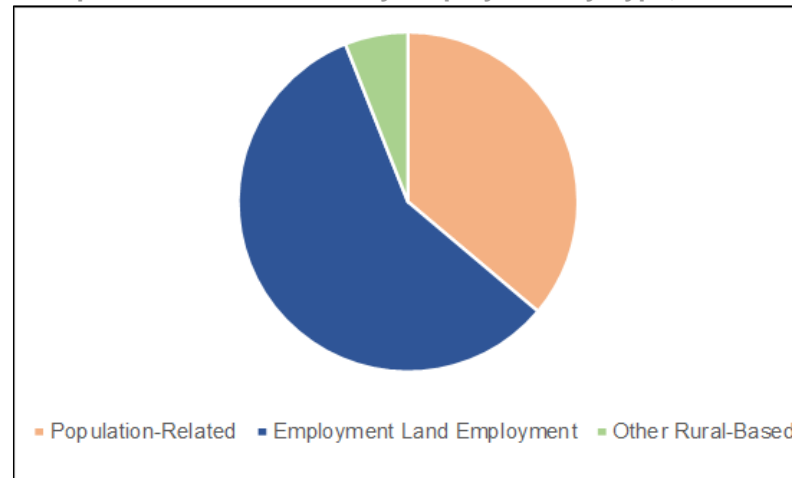


Expect Robust Employment Growth to Continue

- County to grow by 21,000 jobs between 2016 and 2046
- Rate of job growth will be line with population growth
- Growth will be balanced between industrial jobs on employment land and “population related” jobs

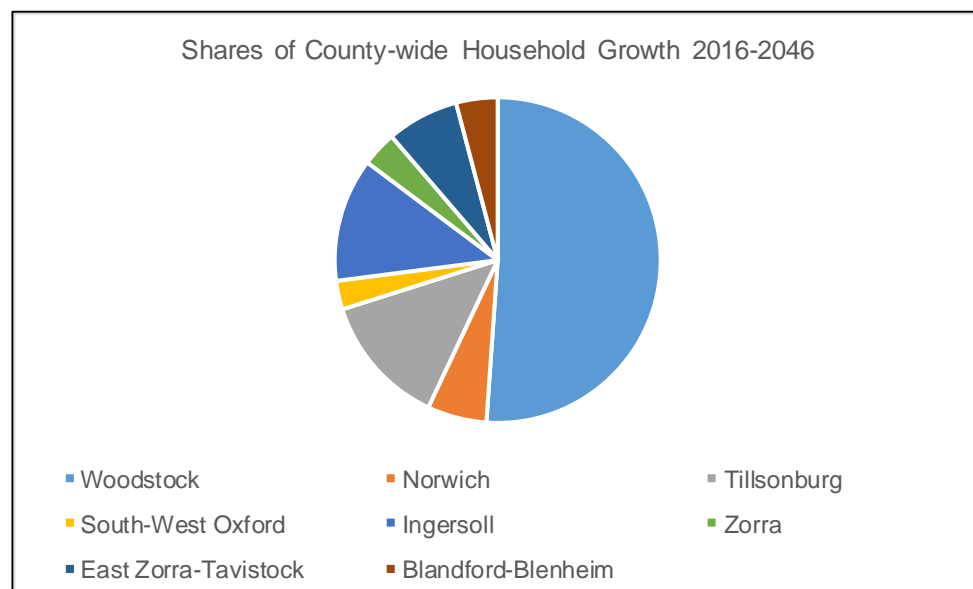
Historical and Forecast Total Employment Oxford County, 2016-2046				
Year	Employment	Growth	Growth Rate	Activity Rate
2001	48,100			
2006	53,000	4,900	1.96%	48.4%
2011	53,100	100	0.04%	51.5%
2016	57,300	4,200	1.53%	50.3%
2021	62,100	4,800	1.62%	51.7%
2026	64,600	2,500	0.79%	51.9%
2031	67,200	2,600	0.79%	50.9%
2036	70,400	3,200	0.93%	50.0%
2041	74,100	3,700	1.03%	49.5%
2046	78,400	4,300	1.13%	49.6%
2016-2046	21,100			

Proportion of Oxford County Employment by Type, 2046



All Area Municipalities Will Experience Growth

- County-wide residential forecasts allocated to Area Municipalities based on shares of household growth
- In consultation with County and Area Municipal staff, we have considered:
 - Recent development trends
 - Land supply and level of services
- Consistent with PPS, most growth directed to Settlement Areas with existing municipal services



2019 to 2039 Outlook Provides Basis for Assessing Land Need

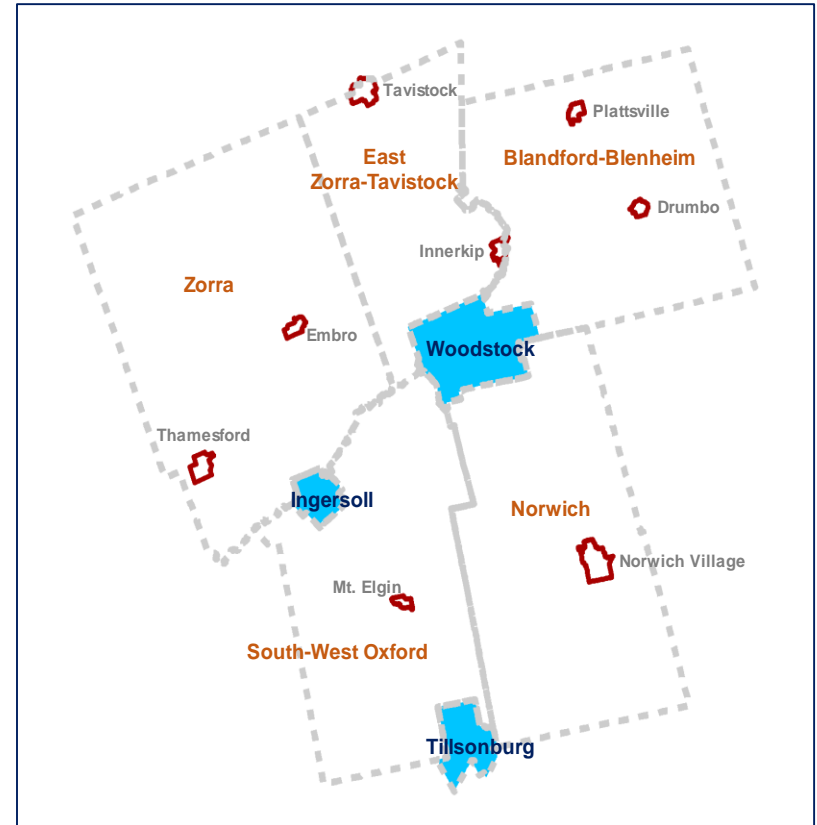
- Residential land need to accommodate population growth is assessed on the basis of household forecast
- For the purpose of assessing industrial land need, focus is on the employment land employment and population-related employment categories

Summary 2019-2039 Growth in Households and Employment*			
Area Municipality	Households	Employment Land Employment	Population Related Employment
Woodstock	6,420	5,050	2,930
Ingersoll	1,520	1,240	640
Tillsonburg	1,650	610	730
Blandford-Blenheim	510	70	110
East Zorra-Tavistock	910	100	250
Norwich	740	150	220
South-West Oxford	360	40	100
Zorra	420	80	80
Oxford County	12,530	7,340	5,060

*Other Rural Based employment excluded for this purpose.

Land Needs Assessment Considers Growth Outlook in Context of Current Supply

- 2019 Oxford County Vacant Land Inventory prepared as basis for assessing land need
- Focus on County's serviced settlement areas
- Land need to accommodate growth outlook for 20-year period from 2019 to 2039 identified
- Compared with available supply to determine any potential additional land need to meet forecast
- Potential for intensification or redevelopment was also recognized



Results Indicate Potential Land Need

- Potential additional land need to accommodate 20-year residential growth outlook to 2039 in some Area Municipalities
 - 225 gross developable ha in Woodstock
 - 75 gross developable ha in Ingersoll
 - 35 gross developable ha in East Zorra-Tavistock; and
 - 15 gross developable ha in South-West Oxford
- Potential industrial land need also identified
 - 317 gross developable ha in Woodstock,
 - 107 gross developable ha in Ingersoll, and
 - 12 gross developable ha in East Zorra-Tavistock.

Next Steps

- Circulate draft report to Area Municipalities for review and comment, followed by posting for public stakeholder review
- Review of comments received and final study report prepared for Council consideration
- Circulate to Province for review and comment

Forecast Results by Area Municipality

Forecast Total Population (Including Census Net Undercoverage) Allocation by Area Municipality								
Municipality	Total Population by Area Municipality							Growth 2016-2046
	2016	2021	2026	2031	2036	2041	2046	
Woodstock	42,040	46,620	50,480	54,470	58,480	62,250	65,950	23,910
Norwich	11,310	11,850	12,320	12,820	13,360	13,890	14,390	3,080
Tillsonburg	16,310	17,380	18,280	19,240	20,240	21,220	22,150	5,840
South-West Oxford	7,880	8,140	8,380	8,650	8,910	9,120	9,330	1,450
Ingersoll	13,110	14,240	15,130	16,090	17,070	18,030	18,960	5,850
Zorra	8,360	8,740	8,990	9,250	9,530	9,830	10,120	1,760
East Zorra-Tavistock	7,330	7,940	8,420	8,930	9,450	9,940	10,400	3,070
Blandford-Blenheim	7,600	7,980	8,300	8,650	9,020	9,400	9,760	2,160
Oxford County	113,900	122,900	130,300	138,100	146,100	153,700	161,100	47,200

Forecast Total Occupied Households, Allocation by Area Municipality								
Municipality	Total Households by Area Municipality							Growth 2016-2046
	2016	2021	2026	2031	2036	2041	2046	
Woodstock	17,150	19,140	20,750	22,330	23,870	25,220	26,510	9,360
Norwich	3,710	3,940	4,120	4,300	4,480	4,640	4,780	1,070
Tillsonburg	7,130	7,640	8,050	8,450	8,850	9,200	9,540	2,410
South-West Oxford	2,700	2,810	2,900	2,990	3,080	3,150	3,220	520
Ingersoll	5,080	5,580	5,950	6,320	6,690	7,020	7,330	2,250
Zorra	3,070	3,240	3,340	3,440	3,530	3,620	3,710	640
East Zorra-Tavistock	2,710	2,990	3,210	3,440	3,660	3,840	4,020	1,310
Blandford-Blenheim	2,730	2,890	3,010	3,140	3,270	3,380	3,490	760
Oxford County	44,300	48,200	51,300	54,400	57,400	60,100	62,600	18,300

Forecast Total Employment, Allocation by Area Municipality								
Municipality	Total Employment by Area Municipality							Growth 2016-2046
	2016	2021	2026	2031	2036	2041	2046	
Woodstock	25,430	28,440	30,040	31,690	33,290	34,890	36,490	13,300
Norwich	4,050	4,200	4,280	4,360	4,440	4,520	4,600	690
Tillsonburg	8,580	9,060	9,320	9,600	9,880	10,160	10,440	2,230
South-West Oxford	2,850	2,920	2,960	2,990	3,030	3,070	3,110	300
Ingersoll	8,990	9,710	10,080	10,470	10,860	11,250	11,640	3,160
Zorra	2,800	2,890	2,920	2,960	3,000	3,040	3,080	350
East Zorra-Tavistock	2,800	2,950	3,020	3,100	3,180	3,260	3,340	650
Blandford-Blenheim	1,820	1,910	1,950	1,990	2,030	2,070	2,110	390
Oxford County	57,300	62,100	64,600	67,200	69,800	72,400	75,000	21,100