Growth Analysis and Land Needs Assessment

Oxford County

Updated Housing and Employment Growth Allocations by Area Municipality and Settlement Area and Community Area Land Needs

September 9, 2025

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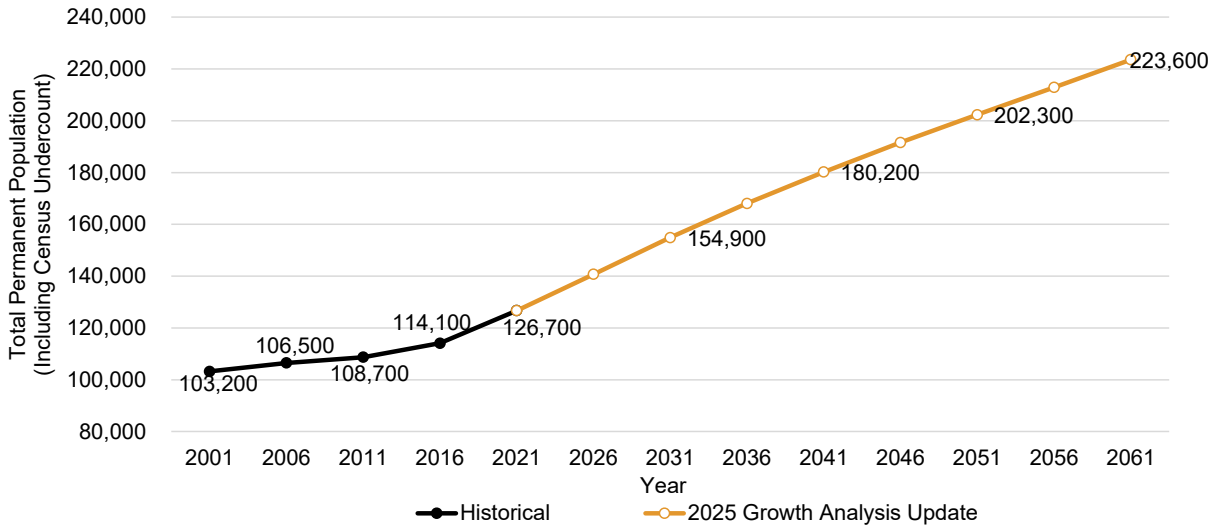
1. County of Oxford Growth Forecast

1.1 County-Wide Residential and Non-Residential Growth Forecast

- The County of Oxford population is projected to reach 223,600 by 2061, achieving an average annual growth rate of 1.6% over the next four decades. This is consistent with the Fall 2024 M.O.F. projections for the County of Oxford to 2051.
- This 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.
- Continued outward growth pressure from the G.G.H. will continue to represent the largest driver of population growth for the County of Oxford.

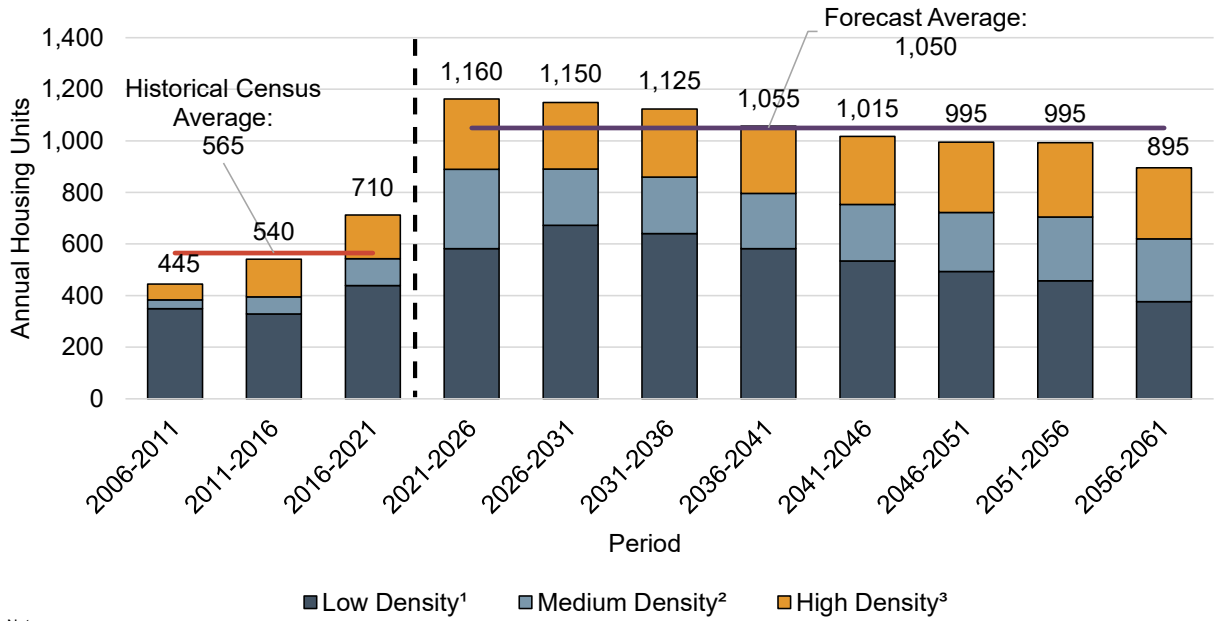
Figure 1
County of Oxford
Total Population, 2001 to 2061



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.

- The population forecast results in an average increase of approximately 1,050 housing units per year from 2021 to 2061. This is almost two times the historical average of 565 units per year achieved from 2006 to 2021.
- Considering recent building trends and active residential development applications, new residential development in the County of Oxford is anticipated to shift 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.
- 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.

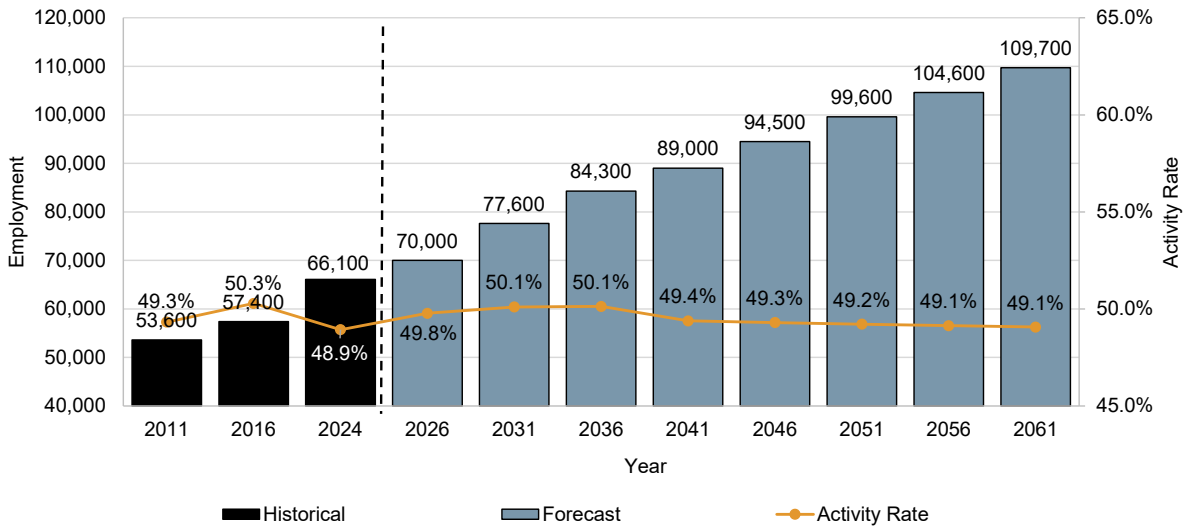
Figure 2
County of Oxford
Housing Forecast by Structure Type, 2006 to 2061



[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 additional residential units.
Note: Figures have been rounded and may not add up precisely.
Source: Historical data derived from Statistics Canada Census profiles; forecast prepared by Watson & Associates Economists Ltd.

- In consideration of macro-economic, regional, and local economic trends as well as the County's long-term population growth forecast, the employment base for the County is forecast to increase by 43,600 employees from 2024 to 2061, reaching 109,700 total jobs by 2061.
- Of the total additional jobs identified for the County of Oxford over the long term to 2061, 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 3
County of Oxford
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.

1.2 County of Oxford Growth Forecast Area Municipal and Settlement Area Allocations

Building on the County-wide forecasts provided in Section 1.1, population, housing, and employment allocations by Area Municipality were developed. 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 not currently in the development approvals process;
- Residential intensification opportunities;
- 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.
- 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.
- 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 at the national, provincial and regional level are 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 the longer term (i.e., 10+ years), the average rate of annual housing development is anticipated to gradually slow (relative the medium-term forecast period i.e. next decade) 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.
- Low-density housing forms are forecast 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.

Figure 4
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 4
County of Oxford
Household Forecast by Area Municipality and Settlement Area, 2021 to 2061

Area	Housing Units Forecast (2021 to 2061)			
	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 suites.
Figure may not sum precisely due to rounding.
Source: 2021 to 2061 forecast by Watson & Associates Economists Ltd.

Figure 5
County of Oxford
Built-Up Area Housing Forecast, 2024 to 2054

Area	Built-Up Area Housing Units Forecast (2024 to 2054)				Area Total Housing Units	Intensification Rate (2024 to 2054)	Built-Up Boundary Supply Potential
	Low Density	Medium Density[1]	High Density[2]	Total Units			
Woodstock	**605**	**680**	**2,220**	**3,505**	**14,015**	**25%**	**2,940**
Ingersoll	**415**	**200**	**105**	**720**	**2,885**	**25%**	**1,455**
Tillsonburg	**380**	**400**	**1,015**	**1,790**	**7,160**	**25%**	**1,395**
Blandford-Blenheim	**50**	**65**	**55**	**175**	**1,160**	**15%**	**120**
Serviced Villages	50	65	55	175	995		120
Unserviced Settlement Area and Remaining Rural Areas	0	0	0	0	160		0
Norwich	**145**	**45**	**100**	**290**	**1,920**	**15%**	**265**
Serviced Village	145	45	100	290	1,680		265
Unserviced Settlement Area and Remaining Rural Areas	0	0	0	0	245		0
East Zorra-Tavistock	**65**	**115**	**100**	**280**	**1,925**	**15%**	**175**
Serviced Villages	65	115	100	280	1,775		175
Unserviced Settlement Area and Remaining Rural Areas	0	0	0	0	150		0
South-West Oxford	**0**	**35**	**55**	**90**	**955**	**9%**	**35**
Serviced Village	0	35	55	90	815		35
Unserviced Settlement Area and Remaining Rural Areas	0	0	0	0	140		0
Zorra	**40**	**300**	**155**	**495**	**1,990**	**25%**	**1,195**
Serviced Villages	40	300	155	495	1,755		1,195
Unserviced Settlement Area and Remaining Rural Areas	0	0	0	0	235		0
Oxford County	**1,700**	**1,845**	**3,805**	**7,345**	**32,010**	**23%**	**7,580**

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

Figure 6
County of Oxford
Unserviced Settlement Area and Remaining Rural Area Housing Forecast, 2021 to 2061

Township	Historical Annual Housing Units (2013 to 2022)	Growth Analysis - Update (2021 to 2061)
Blandford-Blenheim	6	6
Norwich	19	10
East Zorra-Tavistock	5	5
South-West Oxford	8	5
Zorra	8	7
Township Total Unserviced Settlement Area and Remaining Rural Area Units	**46**	**33**
Share of Township Total Housing	**12%**	**12%**

Notes:
Source: Historical annual housing units derived from County of Oxford building permits data. Growth Analysis forecast by Watson & Associates Economists Ltd.

Figure 7
County of Oxford
Employment Forecast by Area Municipality and Settlement Area, 2024 to 2061

Area	Employment Forecast (2024 to 2061)						
	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**
Serviced Villages	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**
Serviced Village	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**
Serviced Villages	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**
Serviced Village	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**
Serviced Villages	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.

2. County of Oxford Land Needs

2.1 Residential Land Supply

2.1.1 Approach

Working with County of Oxford planning staff and Dillon Consulting Ltd. (Dillon), Watson & Associates Economists Ltd. (Watson) has summarized the residential housing supply potential within the Serviced Settlement Areas in accordance with two major policy areas: Built-up Area (B.U.A.) and Greenfield Area. Within the B.U.A., there are two sub-areas: Nodes and Corridors and Remaining B.U.A. The Nodes and Corridors review within the B.U.A. was carried out by Dillon with input from County staff and staff from local municipalities. This analysis identifies vacant lands, infill sites and near-term redevelopment opportunities within key intensification areas of the County's Serviced Settlement Areas. Land supply that falls within the B.U.A. is considered intensification potential, while land supply that falls within the greenfield areas is directly utilized in the land needs assessment. It is important to note that Watson has taken an intensification first approach in addressing the County's long-term land needs.

Under this approach, all at-grade housing unit supply (i.e., low and medium density housing) in the B.U.A. have been utilized over the planning horizon before assessing land needs, however, not all near-term and longer-term high-density housing supply opportunities within the County are expected to be developed over the long-term. Provided below are components of the housing supply potential in the County for serviced settlement areas.

Active Applications

- County planning staff have inventoried all active applications in the Serviced Settlement Areas. 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 of sites in the Serviced Settlement Areas with no active applications. These lands are inventoried based on land area and the County has made assumptions based on Secondary Plans,

land use designations and/or zoning on the type of housing to be accommodated on the vacant land (i.e., low density, medium density and high density housing)

- As previously discussed in the land supply section, 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 include the following:
    - Woodstock, Ingersoll and Tillsonburg: 55%
    - Townships: 60%
- Average density assumptions (i.e. units per hectare) have been 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. Density assumptions are considered an average, recognizing that there may be variation by development. The County's larger urban centres – Woodstock, Ingersoll and Tillsonburg have a higher units per hectare assumption than the County's serviced settlement areas in the Townships. Provided below are the average density assumptions:
    - 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 settlement areas 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

Intensification Opportunities within Nodes and Corridors

- As previously discussed, the Nodes and Corridors review identifies vacant and redevelopment opportunities within key intensification areas of the County's Serviced Settlement Areas. The results of this analysis carried out by Dillon assisted in informing Watson's intensification analysis.

Future Urban Growth Lands/Secondary Plan Areas (Not Designated Yet)

In addition to the above housing supply potential, the County has Future Urban Growth (F.U.G.) and Secondary Plan Areas within designated settlement boundaries that have been identified for residential uses but the lands have not been designated for specific residential uses/densities. The gross developable area of these lands has been used to reduce the land need where applicable.

2.1.2 Residential Housing Unit Potential Supply

Figure 8 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 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 8
County of Oxford
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.

Figure 9 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 9, 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 10 which represents approximately 2,730 housing units.

Figure 9
County of Oxford
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 & Associates Economists Ltd.

Figure 10
County of Oxford
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.

Figure 11 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 11, 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 11
County of Oxford
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	36	24	-	60
Platsville	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.

2.2 Residential Land Needs by Serviced Settlement Area

Provided in the following section is the summary of the residential lands by each serviced settlement area in the County. Provided below is a summary of the components of the land needs figures.

- The forecast for housing growth over the 20-, 25- and 30-year periods to be accommodated in the greenfield areas (lands in the serviced settlement area outside the B.U.A.), as identified in Lines A, B and C.
- The identified greenfield housing supply potential provides a summary of the potential for housing within the greenfield area and includes housing units from active applications, as well as potential on vacant lands with no applications. The total housing supply potential in the greenfield areas is identified in Line D.
- Excess approved housing supply not fully utilized in the B.U.A. growth allocation has been carried forward in the land needs assessment for Ingersoll and Thamesford.
- The gross developable land area of Future Growth Areas (F.U.G.) and new Secondary Plans area Areas are included in the designated land supply, identified in line O.

- The designated greenfield housing demand is compared with the greenfield housing supply in order to determine whether there is a shortfall or surplus of greenfield housing supply, as identified in Lines E, F and G.
- The shortfall of housing units is then converted to net land area by applying an average units per hectare assumption by housing type. The housing units per hectare assumption is provided in Line H. 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 settlement areas in the Townships. Provided below are the units per hectare assumptions:
    - 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 settlement areas 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
- The net land area needs is provided in Lines I, J and K which is calculated by dividing the shortfall of housing units by the average density assumptions. 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.
- 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 lands to accommodate these uses, as identified in Lines L, M and N. 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.

- As a result, Woodstock, Ingersoll and Tillsonburg have a higher upward adjustment to account for other uses to support the residential area which typically require more land for parkland, commercial and institutional uses.
- 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 12
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 Ha 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.

Figure 13
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.

Figure 14
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.

Figure 15
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.

Figure 16
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.

Figure 17
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	-4	-72
2024-2054	N = K / 60%	-79	-9	-4	-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.

Figure 18
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.

Figure 19
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.

Figure 20 provides a summary of the Community Area land needs by Area Municipality. Figures that include negative values indicate a shortfall of land and require additional Community Area, while positive values indicate a surplus of Community Area land and do not require an expansion. As summarized in Figure 20, approximately 390 gross developable hectares of Community Area would be required in the County over the 20-year horizon to support residential development and supporting uses (commercial, institutional and local and civic infrastructure). With the exception of the Township of Blandford-Blenheim and the Township of Zorra, all other municipalities would require

additional Community Area land over the 20-year horizon. The Township of Blandford-Blenheim and the Township of Zorra have a surplus of Community Area lands.

Figure 20
County of Oxford
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
County of Oxford Total (excludes surpluses)	**-390**	**-611**	**-822**

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

Figure 21 provides a summary of all key assumptions utilized in the land needs assessment as previously discussed.

Figure 21
County of Oxford
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%		
County of Oxford	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.

2.3 Employment Area Land Needs

Figure 22 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 22
County of Oxford
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.

Figure 23 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 23
County of Oxford
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	120	140	160	110	130	150
Norwich	190	230	270	180	220	260
East Zorra-Tavistock	180	210	240	170	200	230
Blandford Blenheim	227	270	310	220	260	290
South-West Oxford	120	140	170	110	130	160
Total	**10,367**	**12,340**	**14,220**	**9,370**	**11,150**	**12,860**

Source: Watson & Associates Economists Ltd.

Figure 24 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 10 jobs per hectare is utilized for the serviced settlement areas in the Townships.

Figure 24
County of Oxford
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	110	130	150	10	11	13	15
Norwich	180	220	260	10	18	22	26
East Zorra-Tavistock	170	200	230	10	17	20	23
Blandford Blenheim	220	260	290	10	22	26	29
South-West Oxford	110	130	160	10	11	13	16
Total	9,370	11,150	12,860		651	775	894

Source: Watson & Associates Economists Ltd.

Figure 25 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 25
County of Oxford
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	69	37	8
Zorra	-10	-12	-14	-13	-15	-18	24	11	9	6
Norwich	-2	-6	-10	-3	-8	-13	0	-3	-8	-13
East Zorra-Tavistock	-15	-18	-21	-18	-22	-26	0	-18	-22	-26
Blandford Blenheim	-8	-12	-15	-10	-15	-19	0	-10	-15	-19
South-West Oxford	-0	-2	-5	-0	-3	-7	0	-0	-3	-7
Total							**28**	**-135**	**-250**	**-363**

[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.