



Norfolk County Comprehensive Review Study (C.R.)

Phase 1: Long-Term Growth Analysis

December 2021

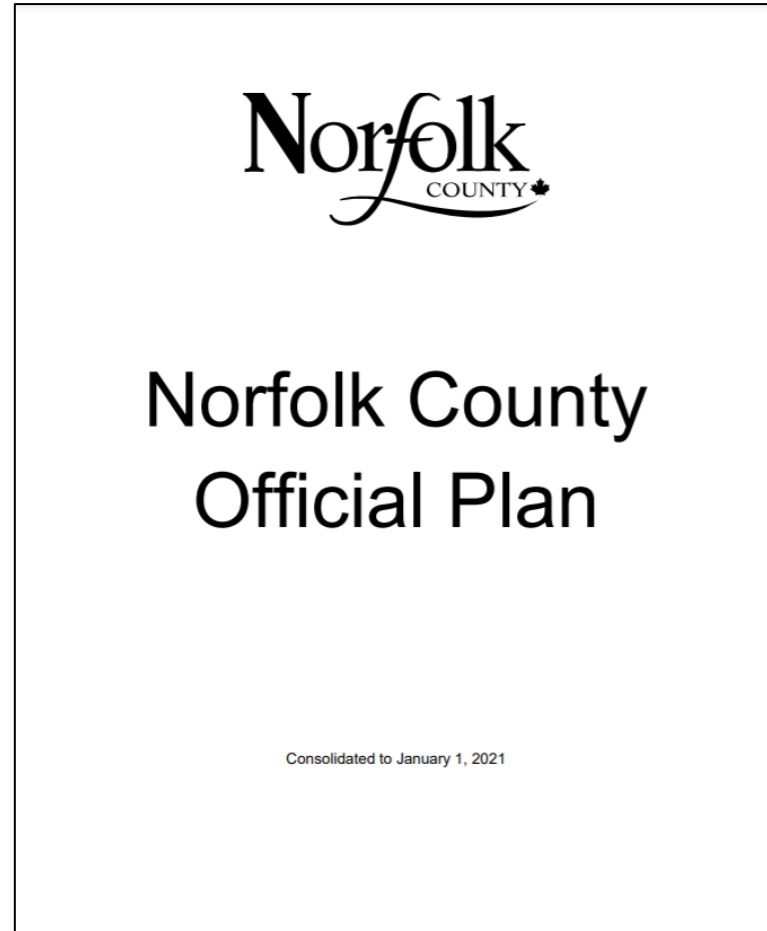
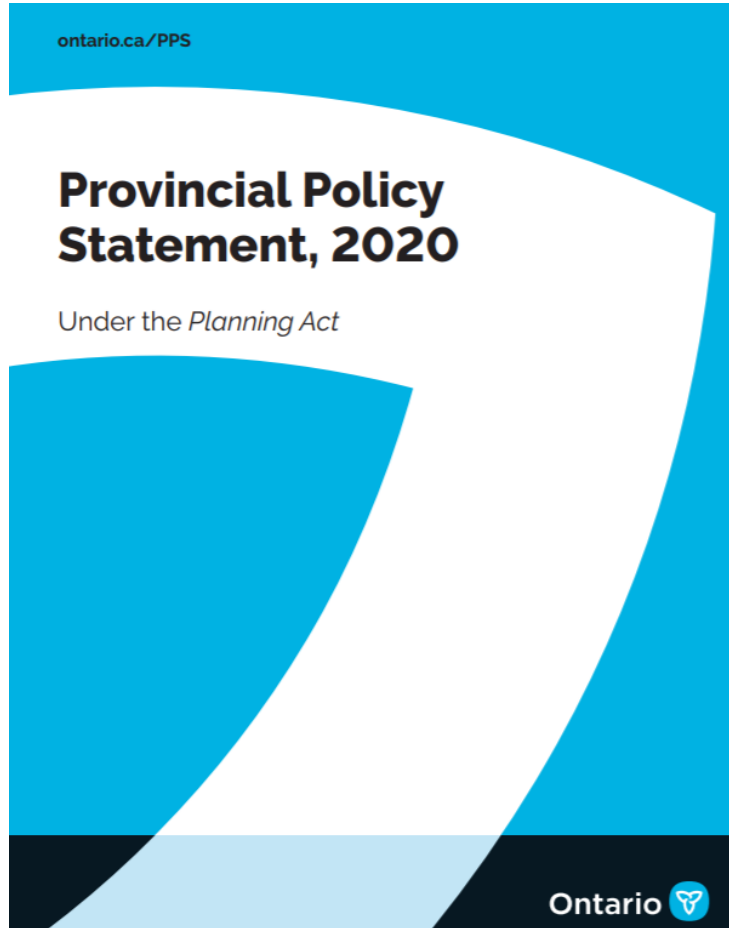
Comprehensive Review Overview



- Norfolk County is now embarking on its Comprehensive Review (C.R.) update, which requires an update of the County's long-term growth projections and urban land requirements.
- Phase 1 of this C.R. exercise provides an update to the County long-term population, household and employment growth forecasts and allocations by settlement area, hamlet and remaining rural area to the year 2051.
- The results of this analysis are also intended to guide decision-making and policy development specifically related to long-term planning and growth management, municipal finance and infrastructure planning carried out for Norfolk County.
- The County is also undertaking an update of its 2018 Development Charges Background Study (D.C.B.S.). The population, household and employment growth forecast carried out as part of the C.R. update will form the basis for the County's updated D.C.B.S growth forecast.

Norfolk County Comprehensive Review: Policy Context

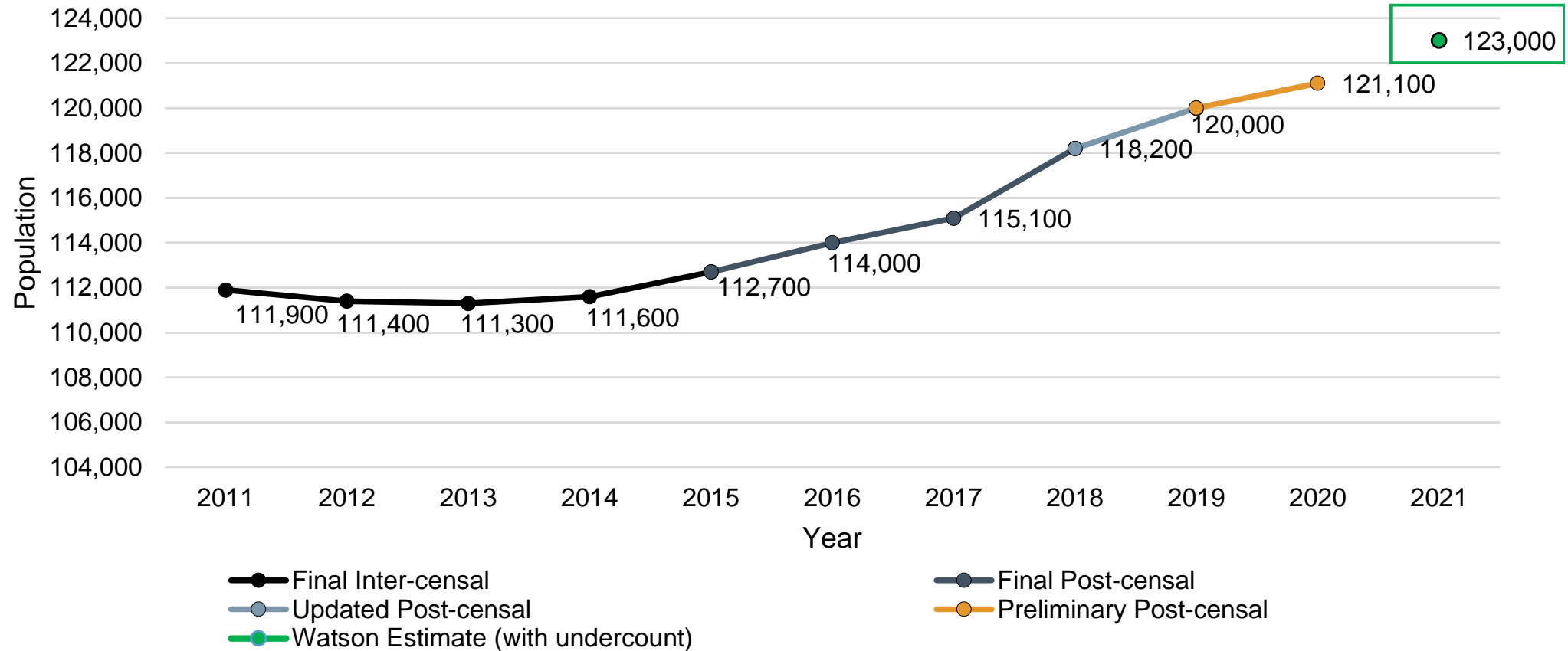
Planning Context



Norfolk County Growth Trends and Drivers

Haldimand-Norfolk Short-Term Population Forecast, 2011 to 2021

Watson & Associates Compared to Statistics Canada



Note: Population includes the net Census undercount and is rounded.

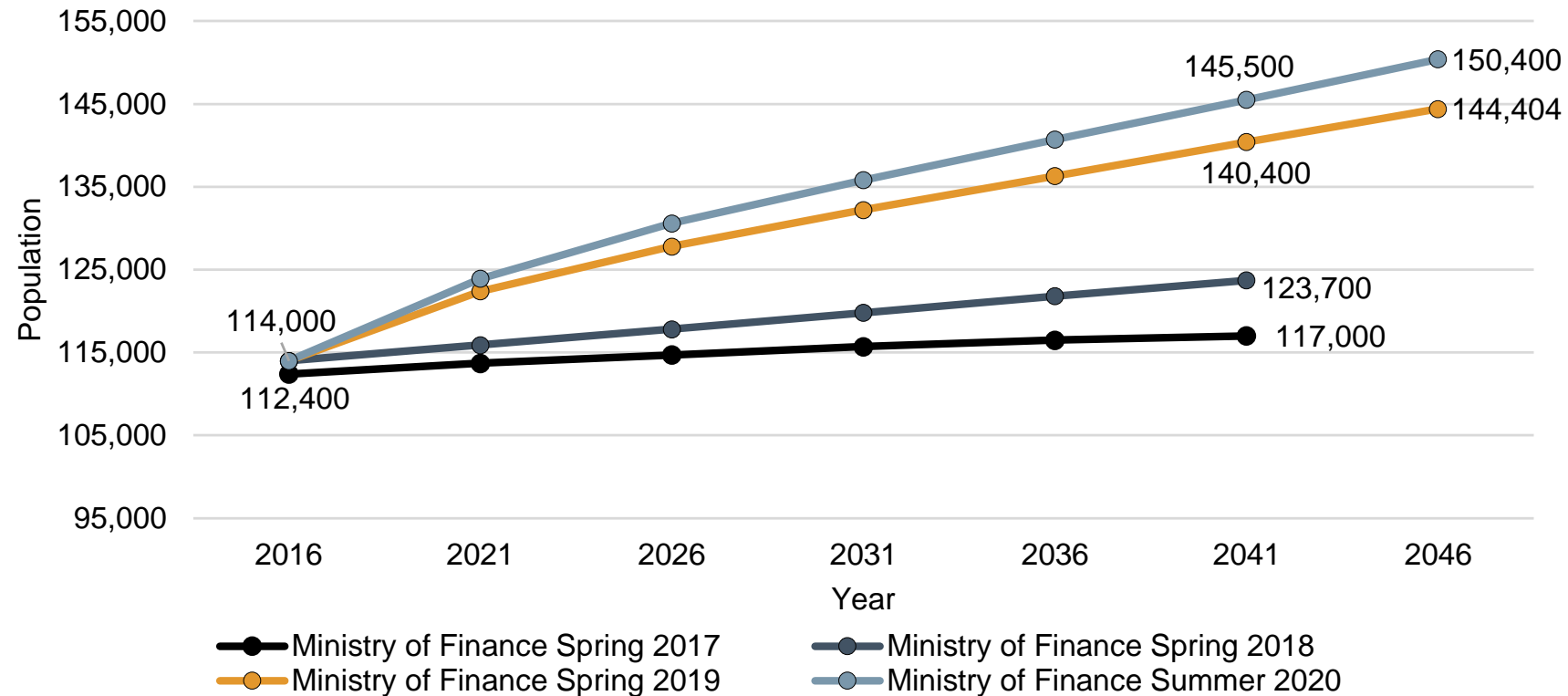
Source: Historical population derived from Statistics Canada Annual Demographic Estimates: Subprovincial Area, by Watson & Associates Economists Ltd.

Norfolk County Growth Drivers and Disruptors

Ministry of Finance Increasing Population Projections



Haldimand-Norfolk Ministry of Finance Population Forecasts



Note: Population includes net Census undercount.

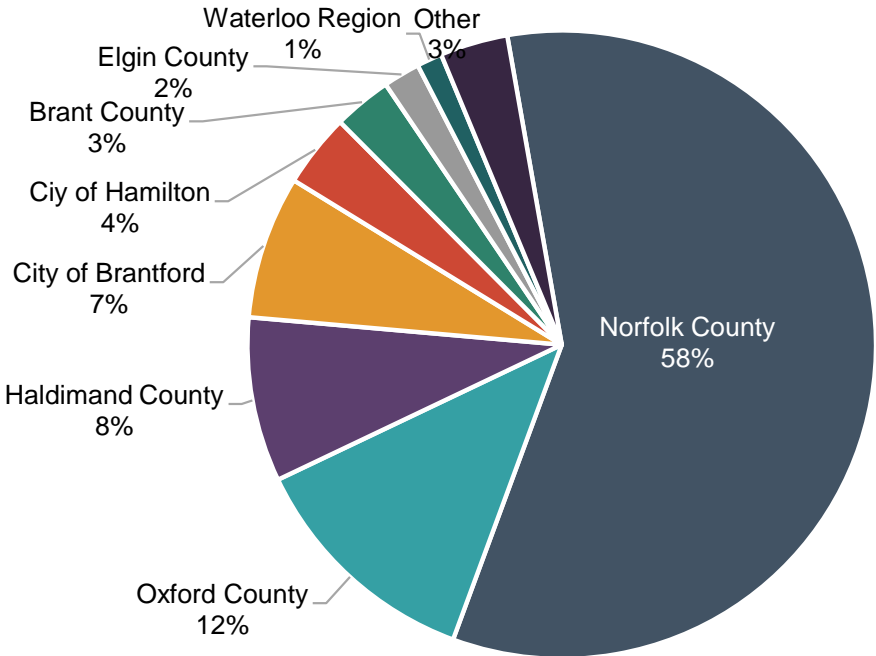
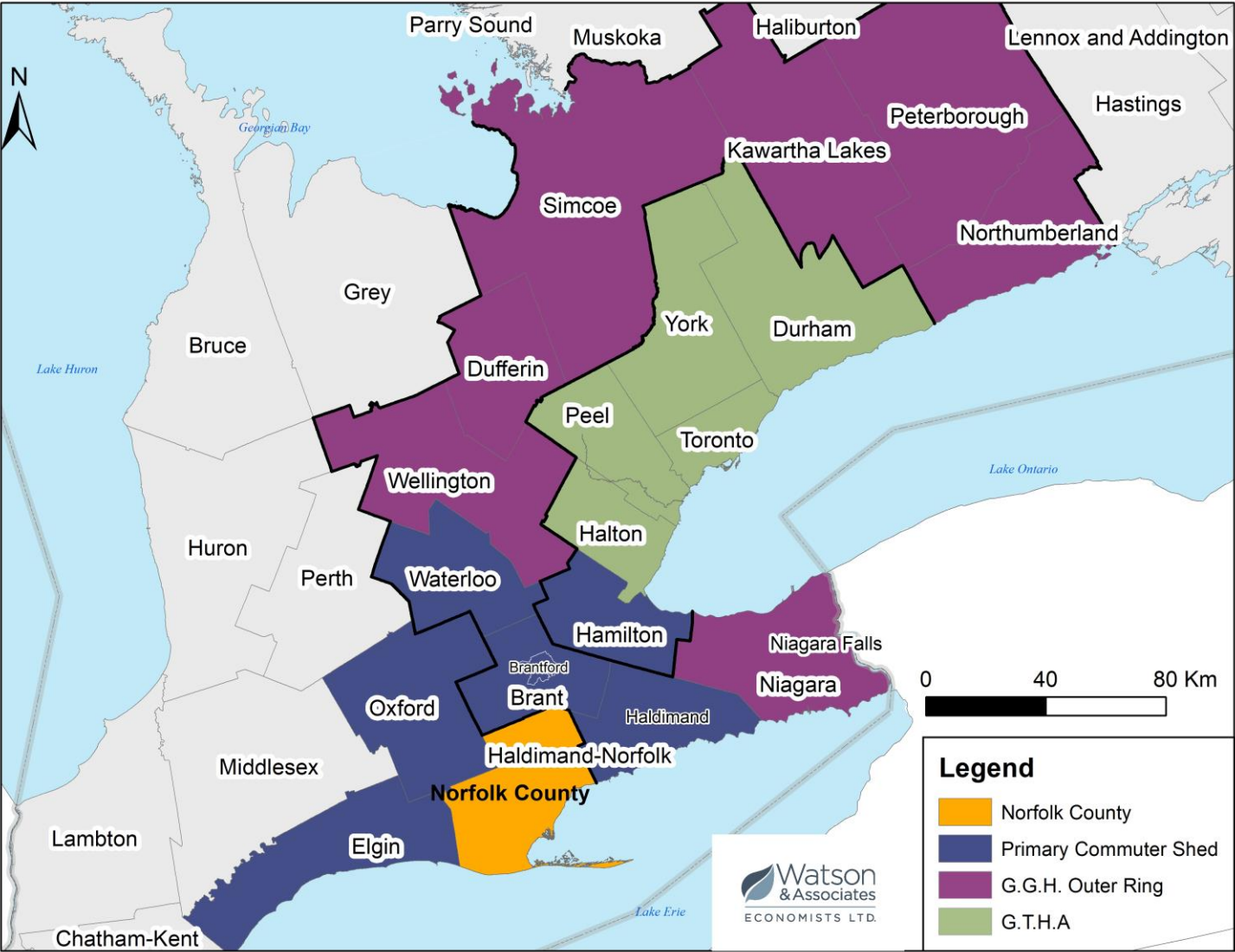
Source: Forecasts adapted from of Finance Population Projections, Spring 2017, Spring 2018, Summer 2019 and Summer 2020 releases. Figure by Watson & Associates Economists Ltd.

Norfolk County Growth Drivers and Disruptors

Employment Opportunities within Norfolk County Commuter Shed



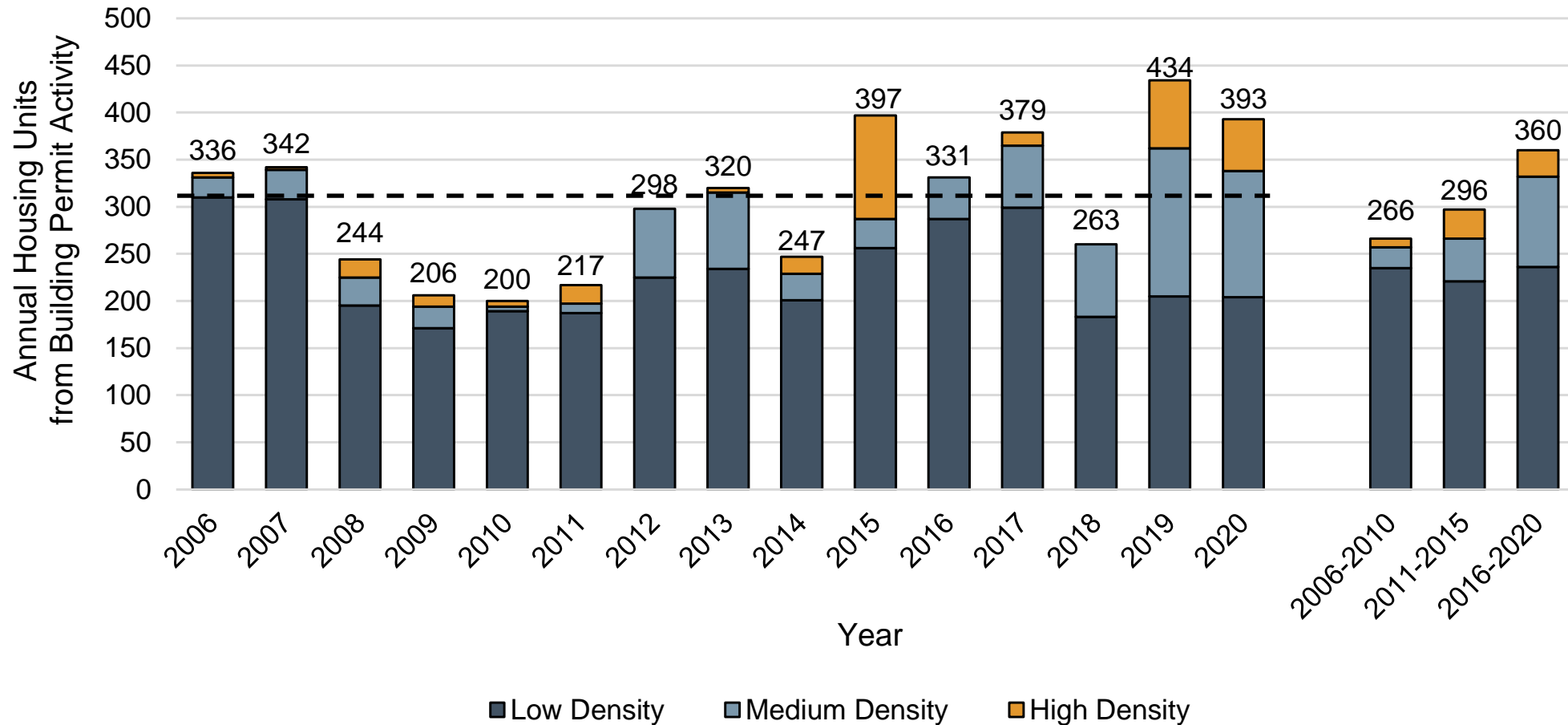
Where Norfolk County Residents Commute to Work



Note: For the purposes of this figure Elgin County includes the City of St. Thomas.
Source: Derived from Statistics Canada - 2016 Census, Catalogue Number

Norfolk County Growth Drivers and Disruptors

Historical Housing Units from Building Permit Activity, 2006 to 2020



Note:

Low density includes singles and semis.

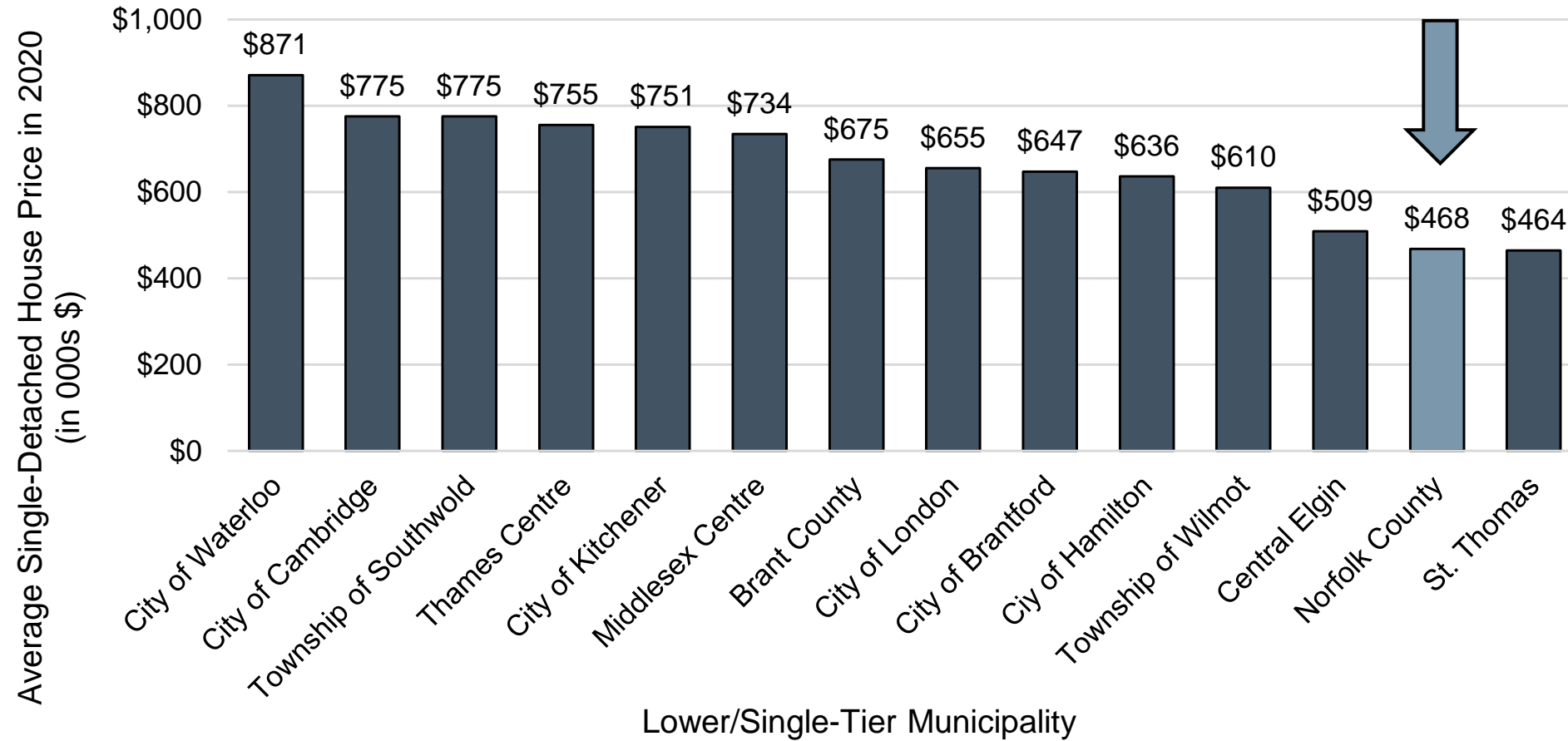
Medium density includes townhouses and apartments in duplexes.

High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: 2006 to 2020 derived from Norfolk County building permit data by Watson & Associates Economists Ltd.

Norfolk County Growth Drivers and Disruptors

Competitive Housing Opportunities



Note: Prices reflect new housing construction absorbed unit prices. Housing price data for Oxford County and Haldimand County not available through the CMHC Market Absorption Survey.

Source: CMHC Market Absorption Survey.

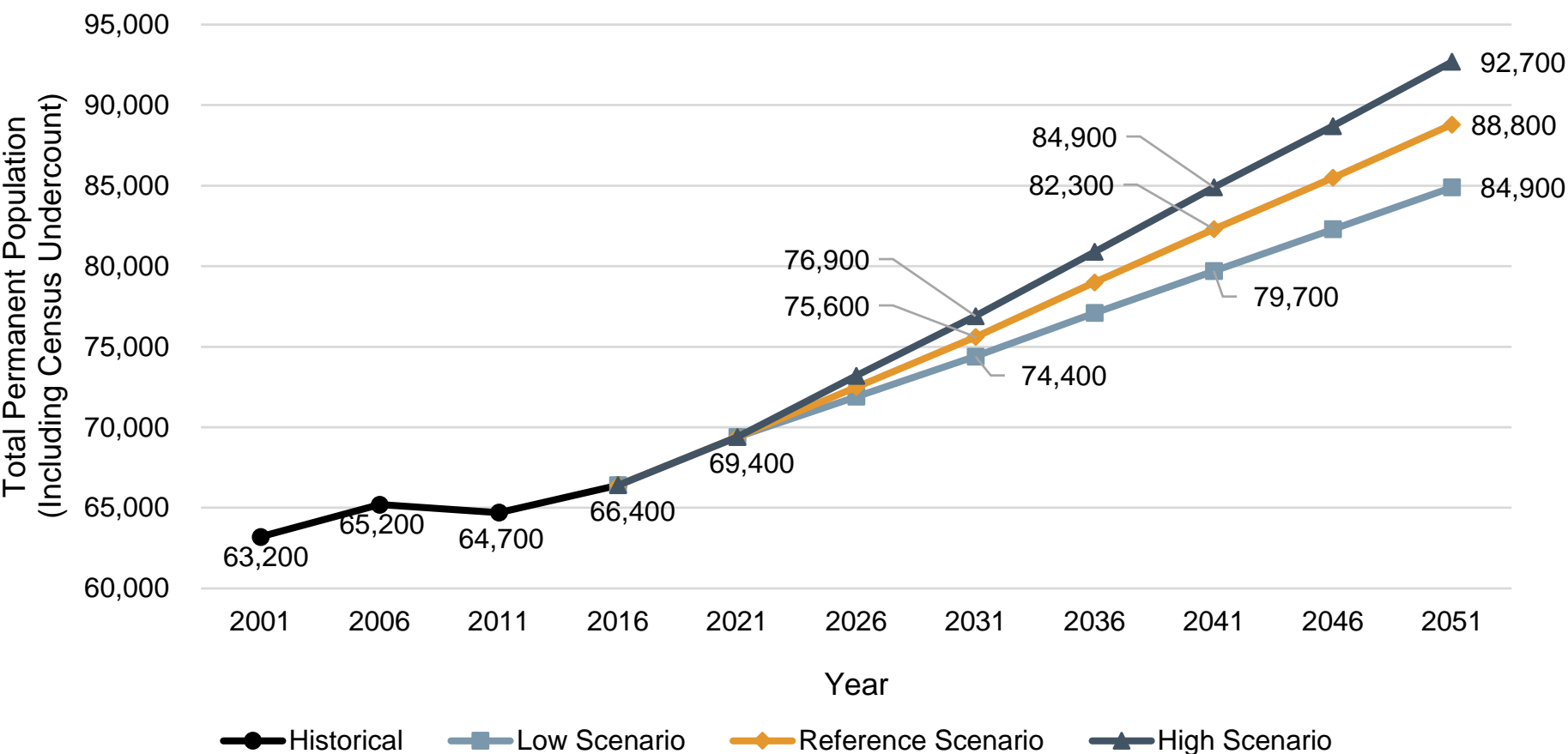
Norfolk County

Long-Term Population and Employment Forecast Scenarios,
2016 to 2051

Norfolk County Forecast Permanent Population Scenarios, 2016 to 2051



2016 to 2051 Annual Growth Rates



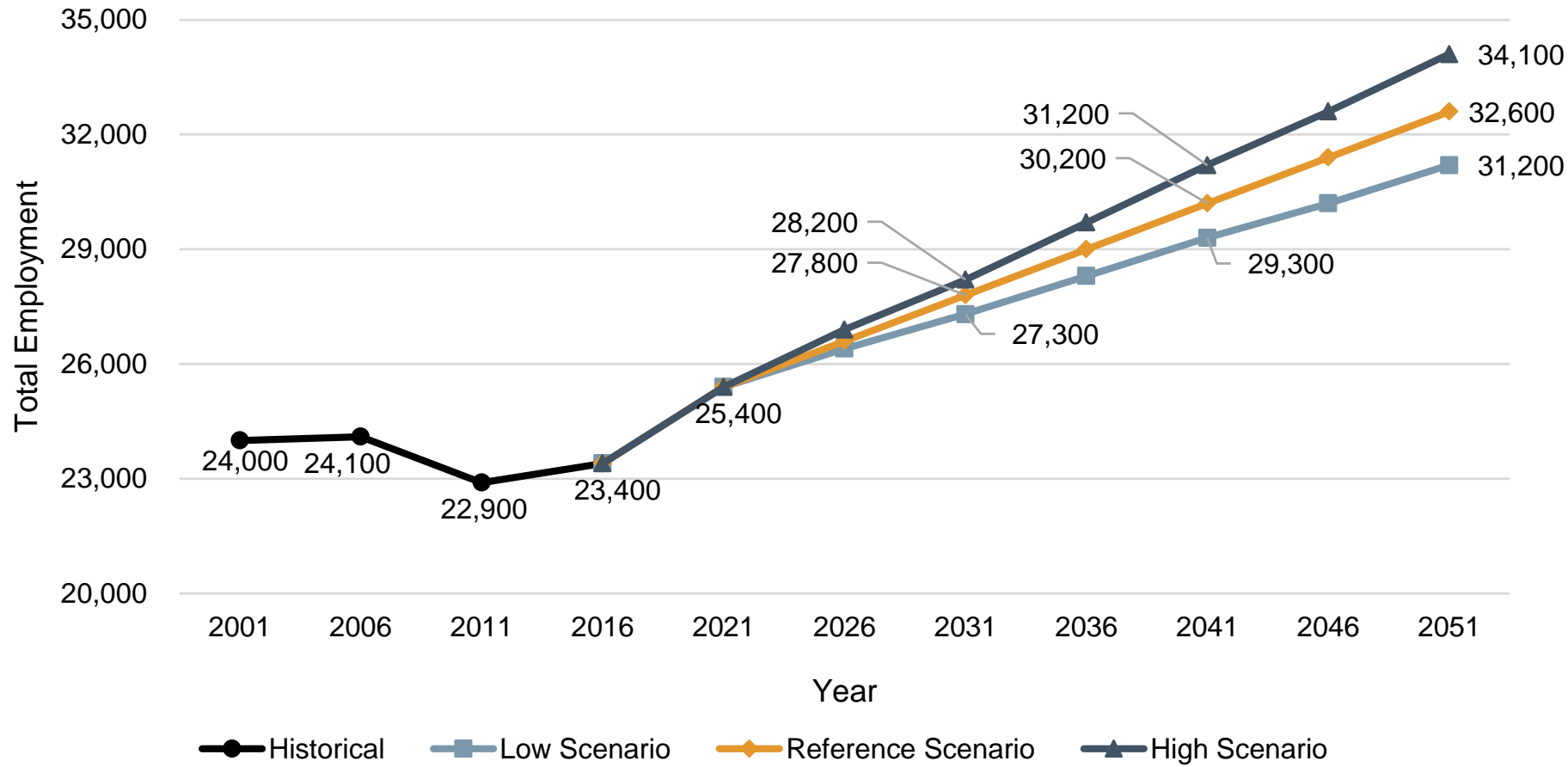
Low Scenario:
0.7%

Reference Scenario:
0.8%

High Scenario:
1.0%

Source: Forecast by Watson & Associates Economists Ltd.
Note: Population includes net Census undercount.

Norfolk County Forecast Employment Scenarios, 2021 to 2051



2016 to 2051 Annual Growth Rates

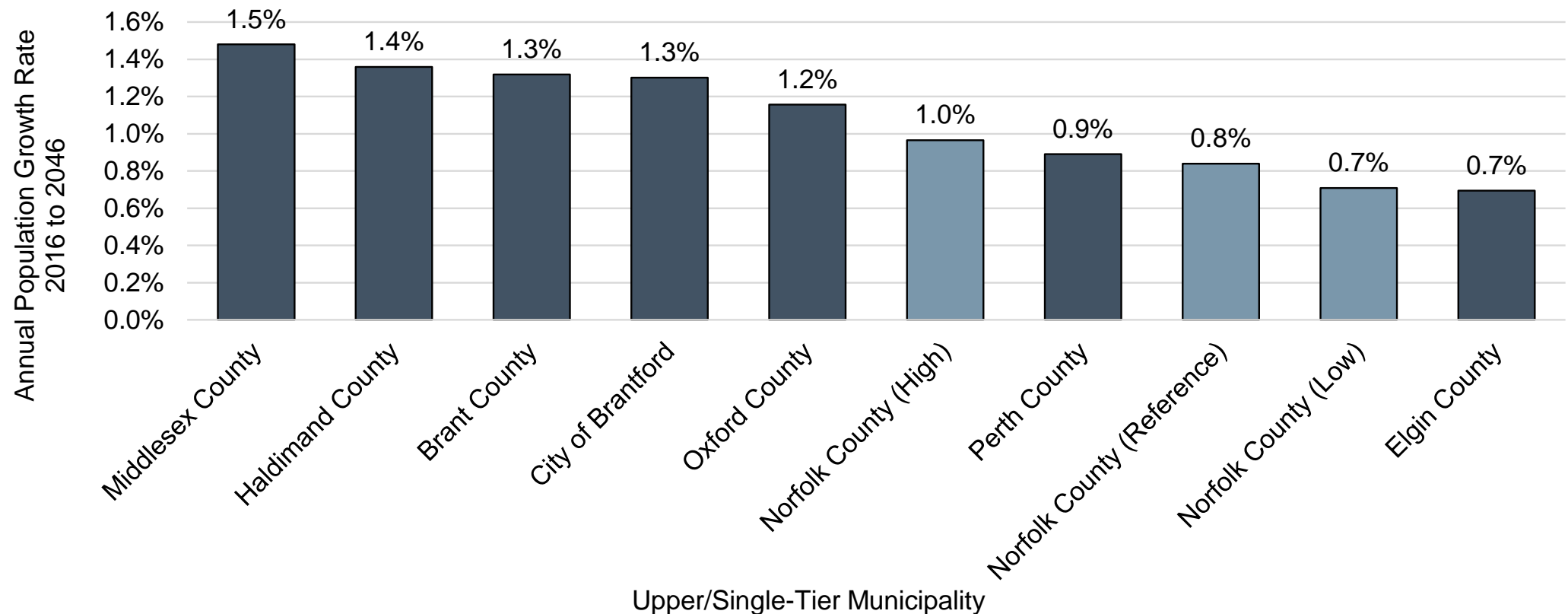
Low Scenario:
0.8%

Reference Scenario:
1.0%

High Scenario:
1.1%

Source: Forecast by Watson & Associates Economists Ltd.
Note: Total employment includes no fixed place of work and work at home employment.

Annual Permanent Population Forecast Growth Rate Comparison, 2016 to 2046



Note: Population used to derive growth rates includes net Census undercount. Elgin County is based Ministry of Finance population projections for the purposes of this figure as they are currently in the process of updating their Official Plan forecast.

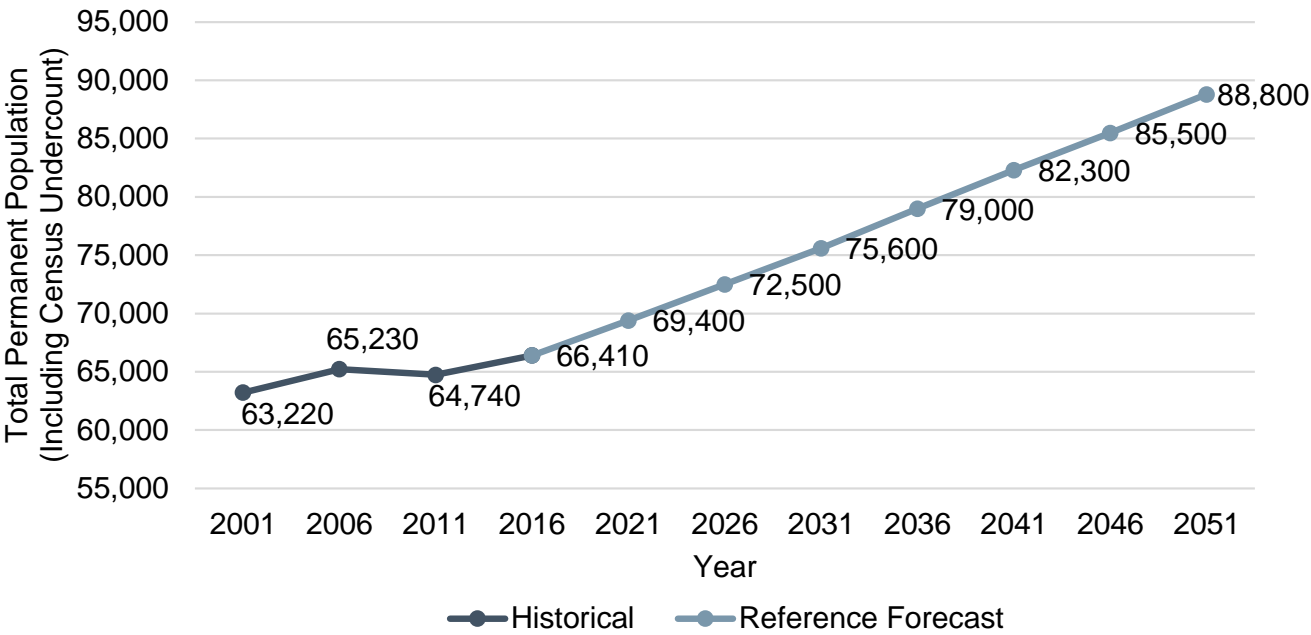
Source: Middlesex County by Watson & Associates Economists Ltd., Haldimand County, Brant County and City of Brantford from Greater Golden Horseshoe: Growth Forecastst to 2051 Technical Report, August 26, 2020, Hemson Consulting Ltd., Oxford County from Oxford County Phase One Comprehensive Review, January 17, 2019, Hemson Consulting Ltd, Elgin County from the Ministry of Finance Summer 2020 Population Projections, Perth County from Perth County Official Plan Update - Comprehensive Review Final Report, April 21, 2020, Watson & Associates Economists Ltd., and Norfolk County by Watson & Associates Economists Ltd.

Norfolk County Reference Permanent Population Growth Scenario, 2016 to 2051



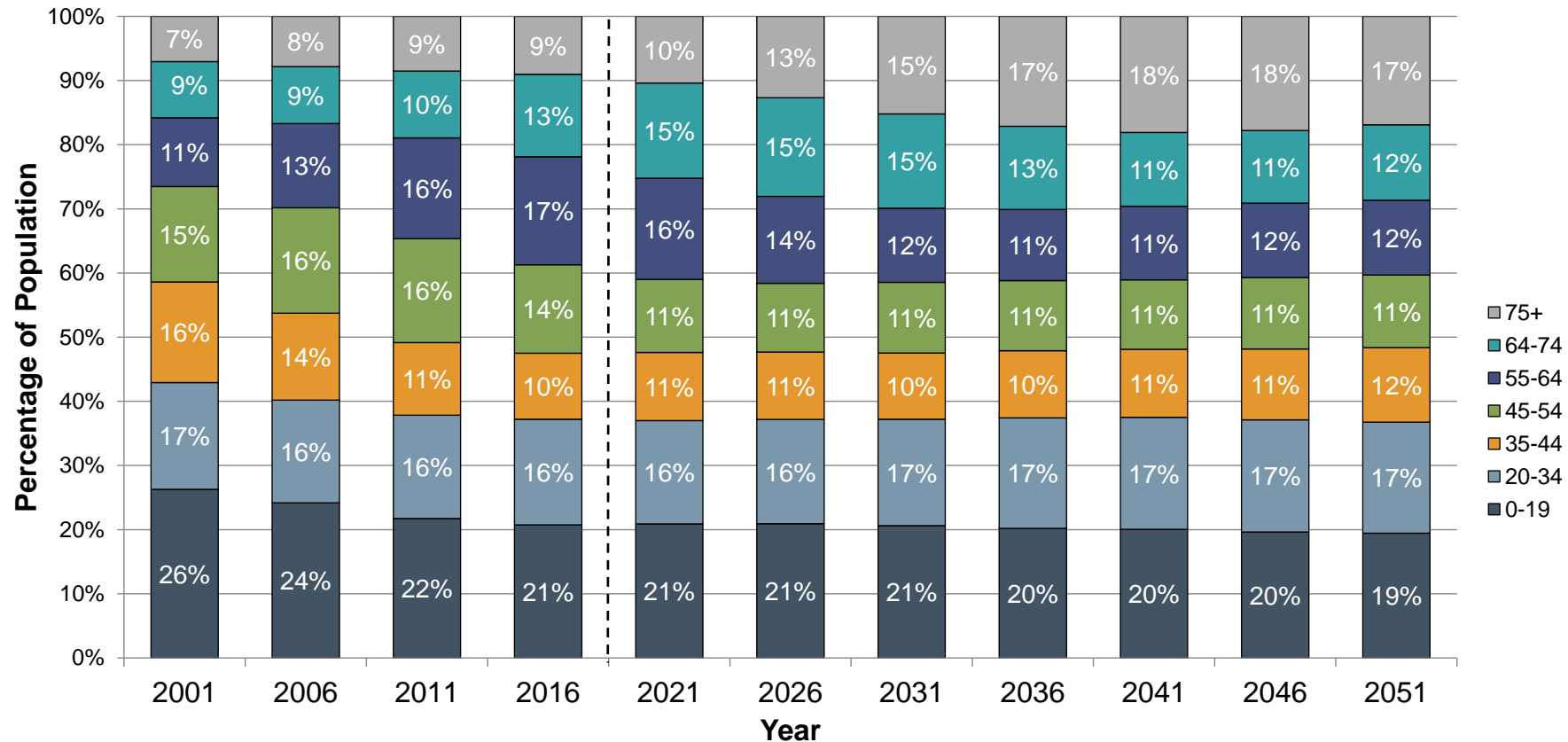
The reference scenario represents the “most likely” scenario for the following reasons:

- Represents a reasonable reflection of growth relative to historical trends;
- Embraces the identified growth drivers;
- Contextualizes Norfolk County growth potential within the regional market area; and
- Represents realistic forecast migration trends and age structure.



Note: Population includes the net Census undercount.
Source: Historical from Statistics Canada Census, 2001 to 2016, and forecast by Watson & Associates Economists Ltd.

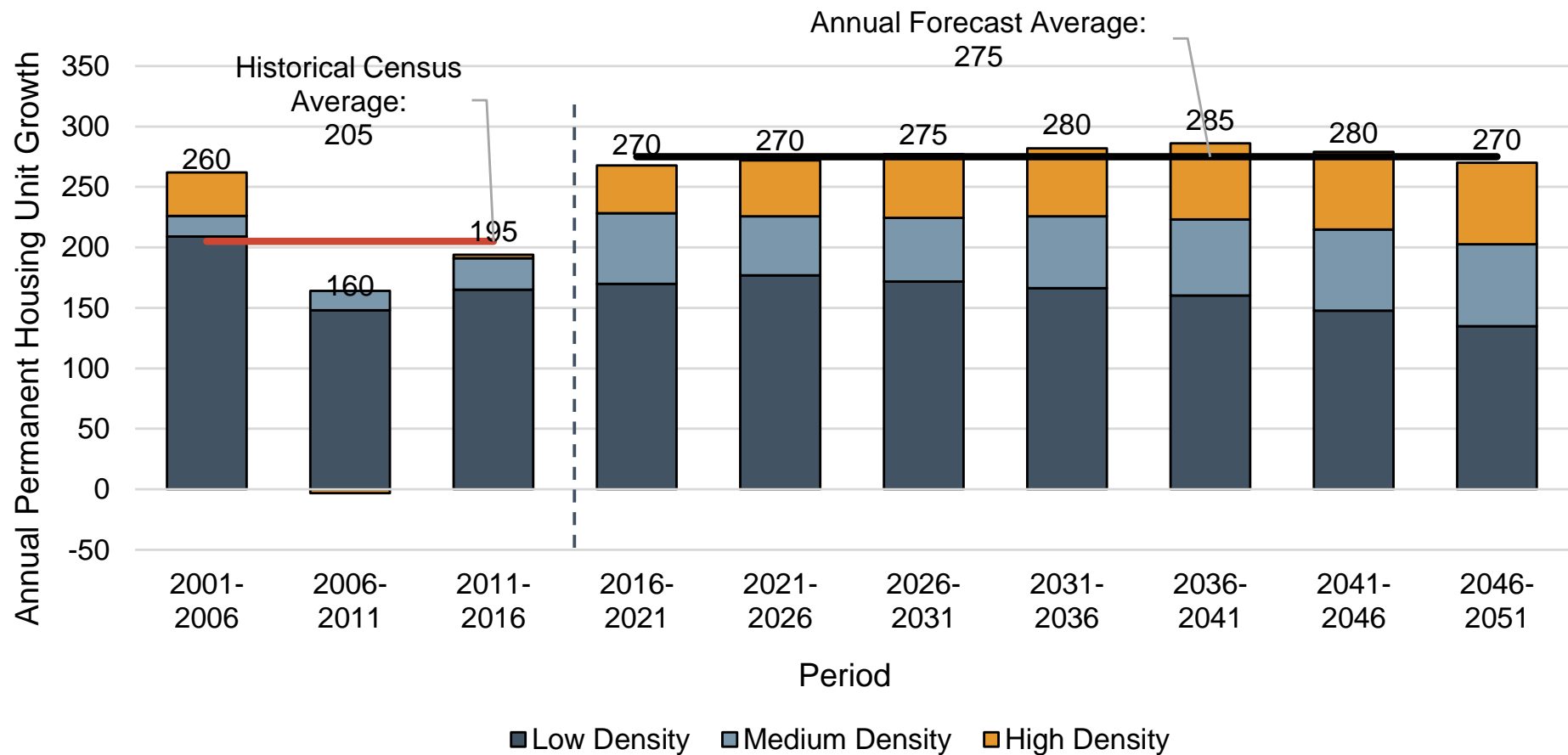
Norfolk County Permanent Population Forecast by Age, 2016 to 2051



Source: Population forecast by age derived from 2001 to 2016 Statistics Canada census by Watson & Associates Economists Ltd. 2016 to 2051 population forecast by age prepared by Watson & Associates Economists Ltd.
Note: Population includes net Census undercount.

- Norfolk County's population is aging, between 2016 and 2051 the percentage of persons 75+ years of age or older is forecast to nearly double.

Norfolk County Incremental Permanent Housing Growth in New Units, 2016 to 2051



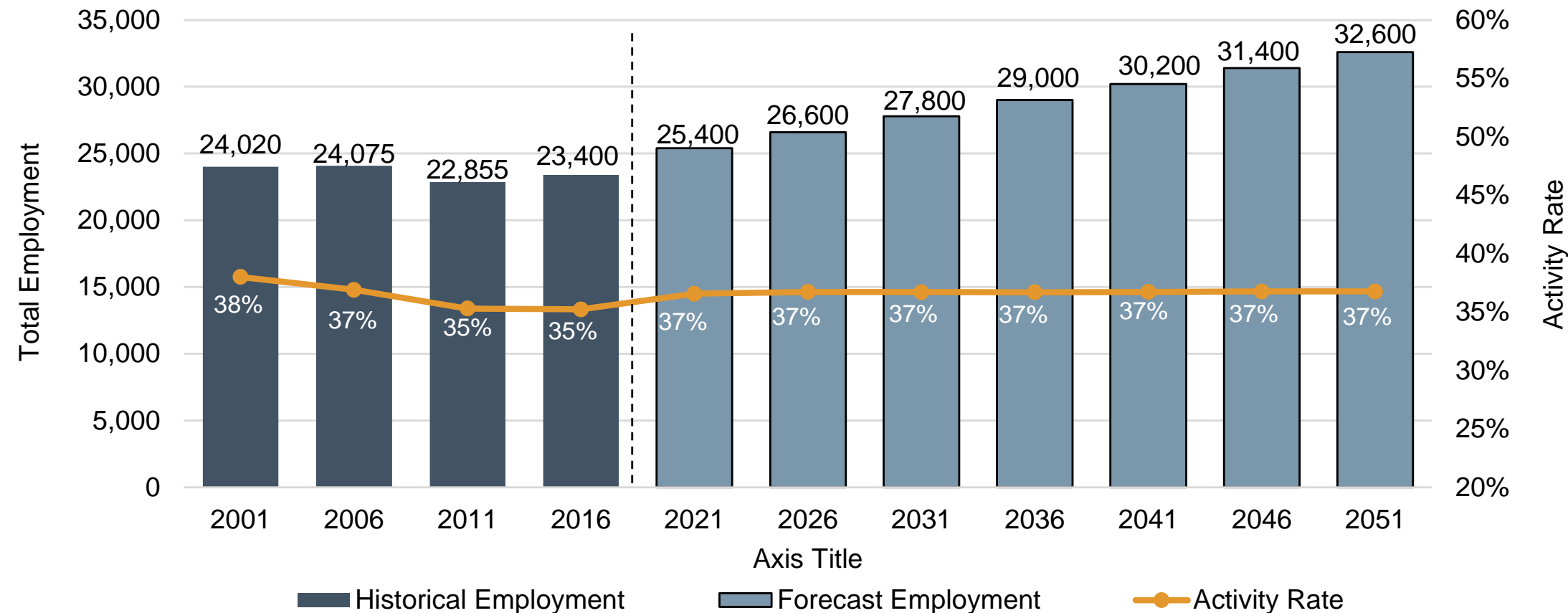
Note:
Low density includes singles and semis.
Medium density includes townhouses and apartments in duplexes.
High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: 2011 to 2016 derived from Statistics Canada 2011 to 2016 Census data. 2016 to 2051 forecast by Watson & Associates Economist Ltd.

2021 to 2051
total housing
growth:
8,300 units

2021 to 2051
total housing
mix:
Low: 60%
Medium : 25%
High: 15%

Norfolk County Preferred Employment Forecast, 2016 to 2051

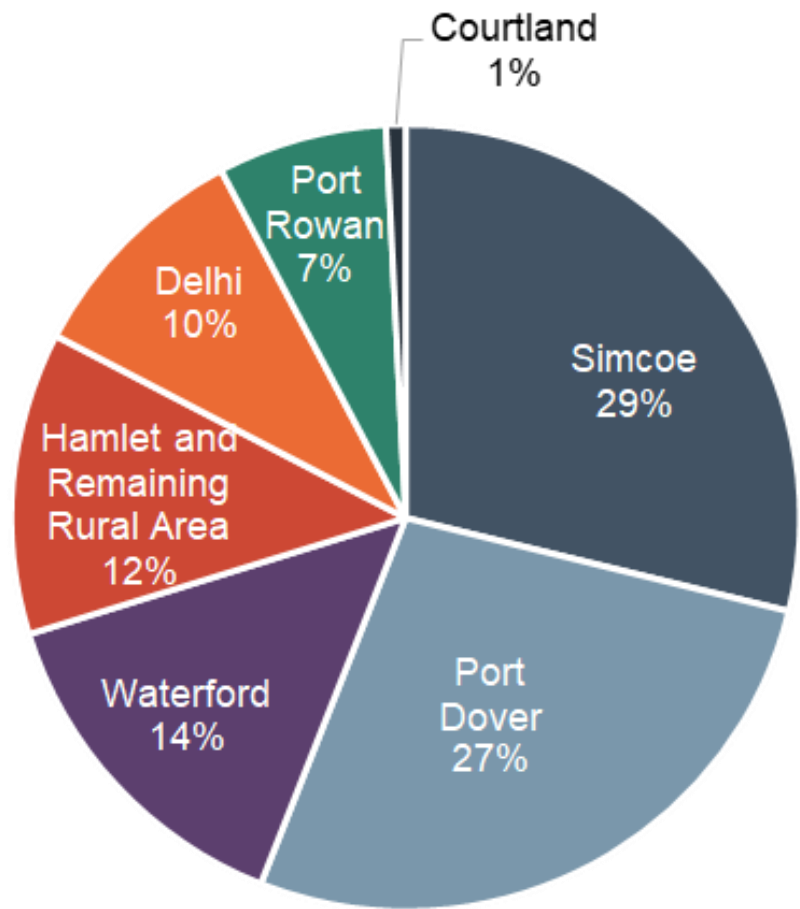


Note: Activity rate is calculated with population including the net Census undercount. Numbers have been rounded.
Source: 2001 to 2106 from Statistics Canada place of work data including work at home and no fixed place of work data. Employment Forecast derived by Watson & Associates Economists Ltd.

Norfolk County

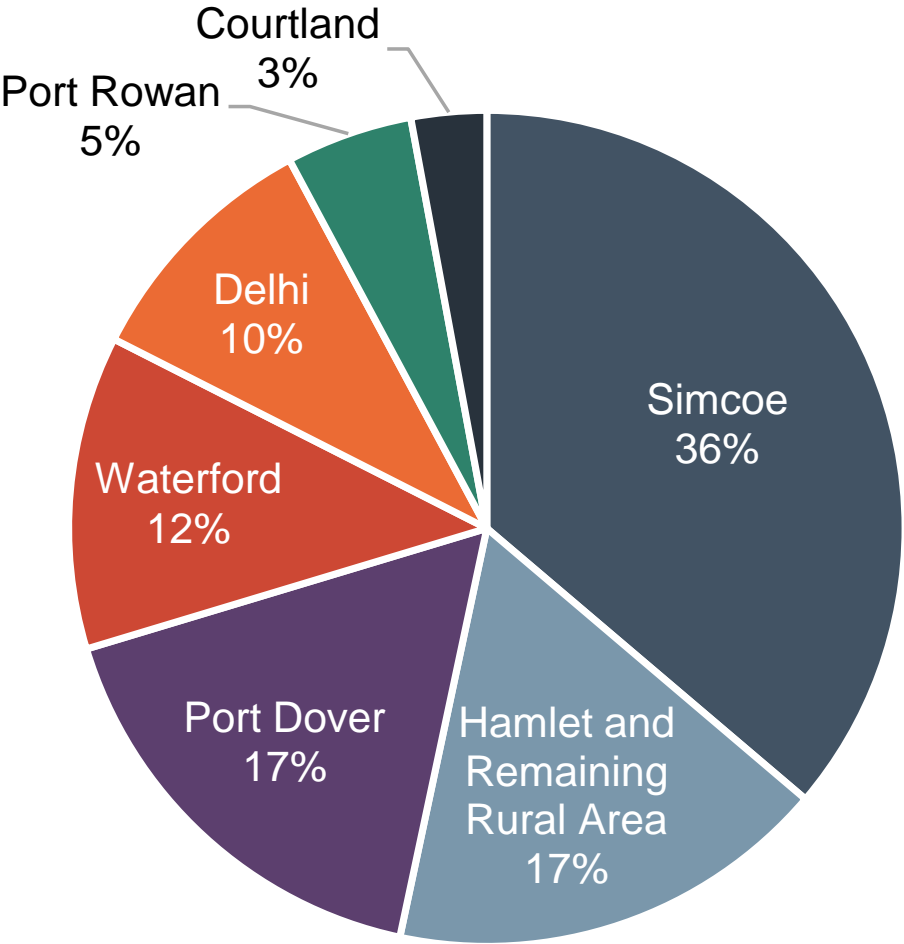
Growth Allocations

Norfolk County Population Growth Allocations 2016 to 2051



Note: Population includes net Census undercount.
Source: Watson & Associates Economists Ltd.

Norfolk County Employment Growth Allocations 2016 to 2051



Source: Watson & Associates Economists Ltd.

Summary of Findings



- Norfolk County total permanent population is forecast to increase from 66,400 in 2016 to 88,800 by 2051, representing an increase of 22,400 persons;
- Permanent County-wide housing growth is forecast to average 275 new units annually between 2016 to 2051. Comparatively, this represents faster growth than the historical average (205 units annually) achieved between 2001 to 2016;
- The total number of jobs within Norfolk County is forecast to increase from 23,400 in 2016 to 32,600 in 2051, with most job growth concentrated in commercial and institutional sectors driven by population growth; and
- The County's urban areas are forecast to comprise the majority of residential and non-residential growth.

Thank You

Questions?