



 **Watson  
& Associates**  
ECONOMISTS LTD.

# Middlesex Centre

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Official Plan Review – Long-term Growth Analysis and Urban Land Needs

Statutory Public Meeting

November 2021 

# Introduction



# Introduction

## Study Purpose

- Watson & Associates Economists Ltd. (Watson) and WSP, were retained by the Municipality of Middlesex Centre to undertake a Growth Management Strategy (G.M.S).
- This study provides the following outcomes:
  - Long-Term Population, Housing and Employment Growth;
  - Economic Diversification Strategy;
  - Urban Land Needs Analysis;
  - Policy and Strategic Recommendations.



# Introduction

## Purpose of Presentation

- The purpose of this presentation is to ***provide the findings of our technical analysis*** as it relates to the long-range Municipal-wide growth scenarios.
- As part of this presentation, Watson will be recommending a “***preferred***” long-range population and employment ***growth scenario*** which will be used to inform growth allocations and urban land needs by local municipality and by Settlement Area to the year 2046.



# Introduction

## Background

- January 2021 Council endorsed population and housing projections for Middlesex County;
- These projections are intended to be used by the County and local municipalities to assist in managing growth and development;
- The range of growth scenarios allows local municipalities to select the forecast that is most appropriate for their circumstances.

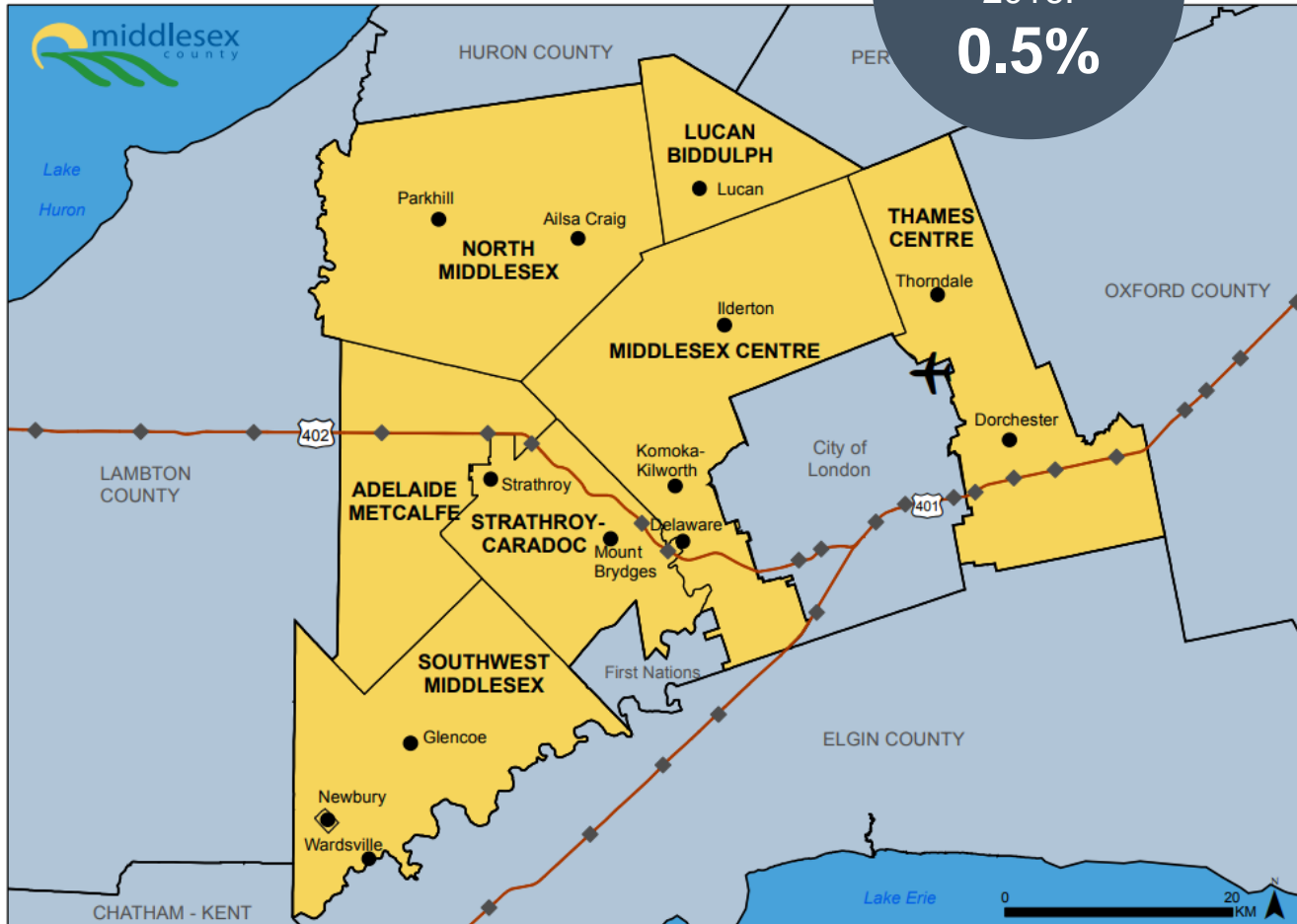


# Introduction

## Background

### Average Annual Population Growth Rates:

Communities in Middlesex County



### Forecast Growth Rates 2016 to 2046

Low Scenario: **0.9%**

Medium Scenario: **1.3%**

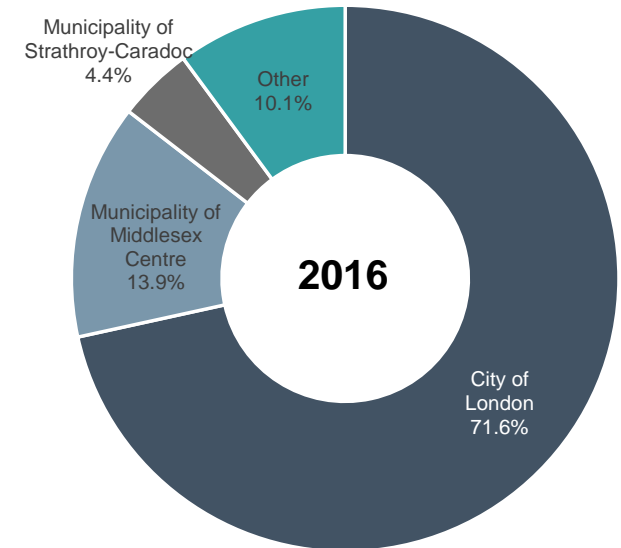
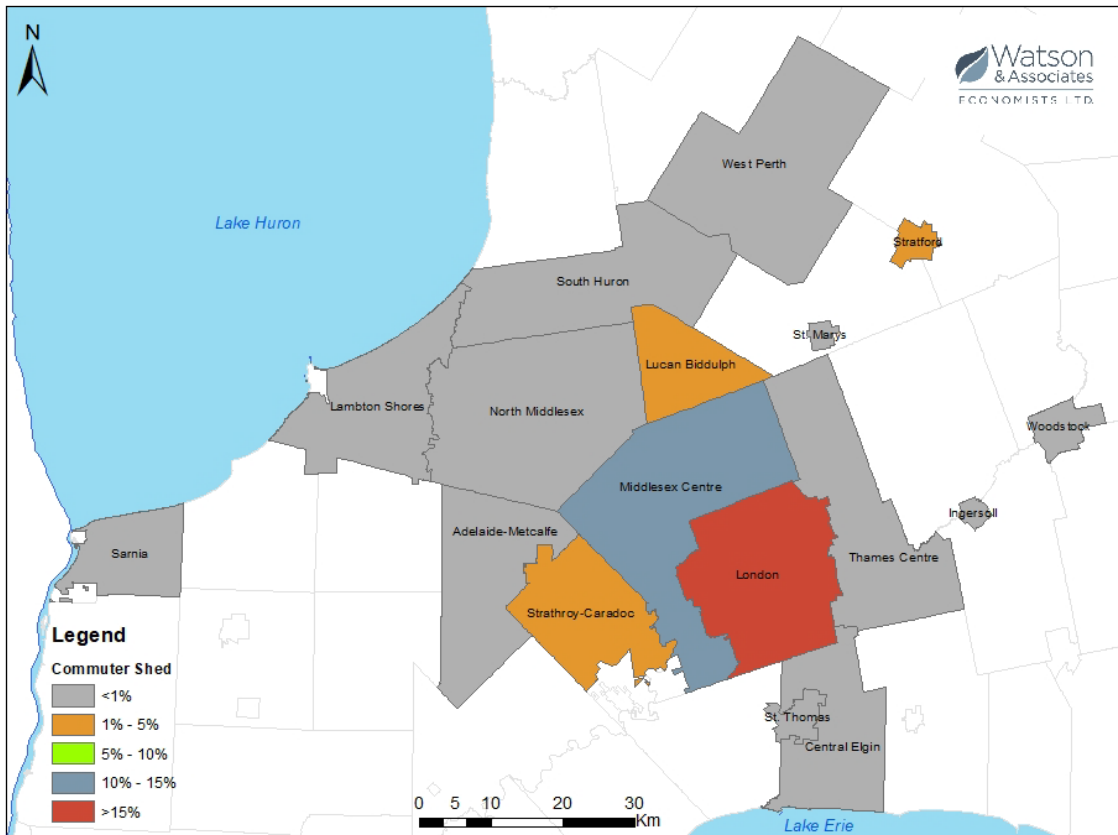
High Scenario: **1.5%**

# Regional Growth Drivers & Disruptors

# Municipality of Middlesex Centre Growth Drivers & Disruptors



## Where Middlesex Centre Residents Commute to Work

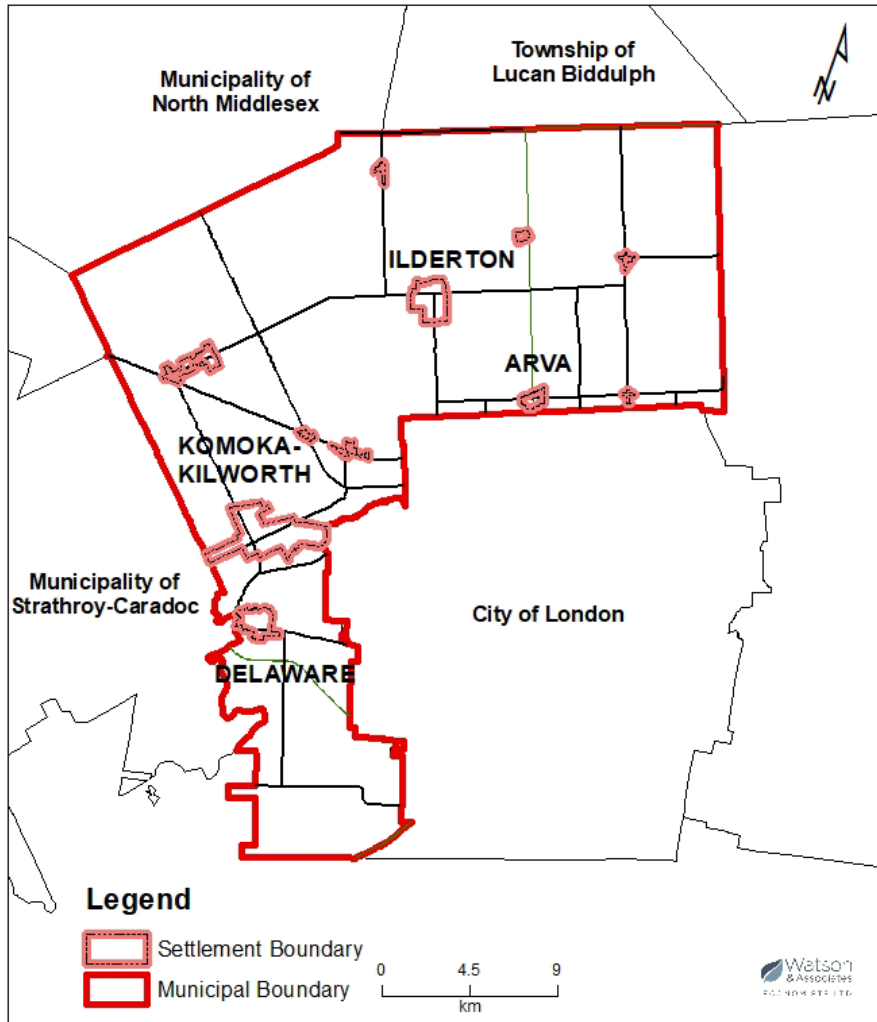


Residents work within Middlesex Centre & London:  
**86%**

Source: 2016 data from Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016325 summarized by Watson & Associates Economists Ltd., 2021.



# Municipality of Middlesex Centre Community Structure



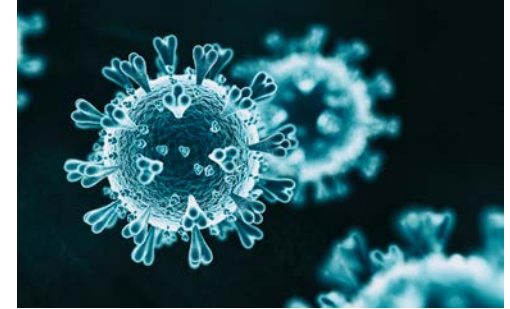
- ***Urban Settlement Area and Community Settlement Areas*** will continue to face development pressures due to their ***proximity to the City of London.***

# Middlesex Centre Growth Drivers & Disruptors

## Growth Drivers & Disruptors



- Impacts of COVID on Near-Term Economic Growth
- Economic Opportunities
  - Continued focus in manufacturing and growing demand for Goods Movement;
  - Changing Nature of Work;
  - Promoting Village Centres and Settlement Commercial Areas; and
  - Planning for Tourism and Promoting the Agriculture Industry.



# Municipality of Middlesex Centre Growth Drivers & Disruptors



- Population Growth of the 55+ Age Group
- Attracting Millennials and Future Generations
- Quality of Life

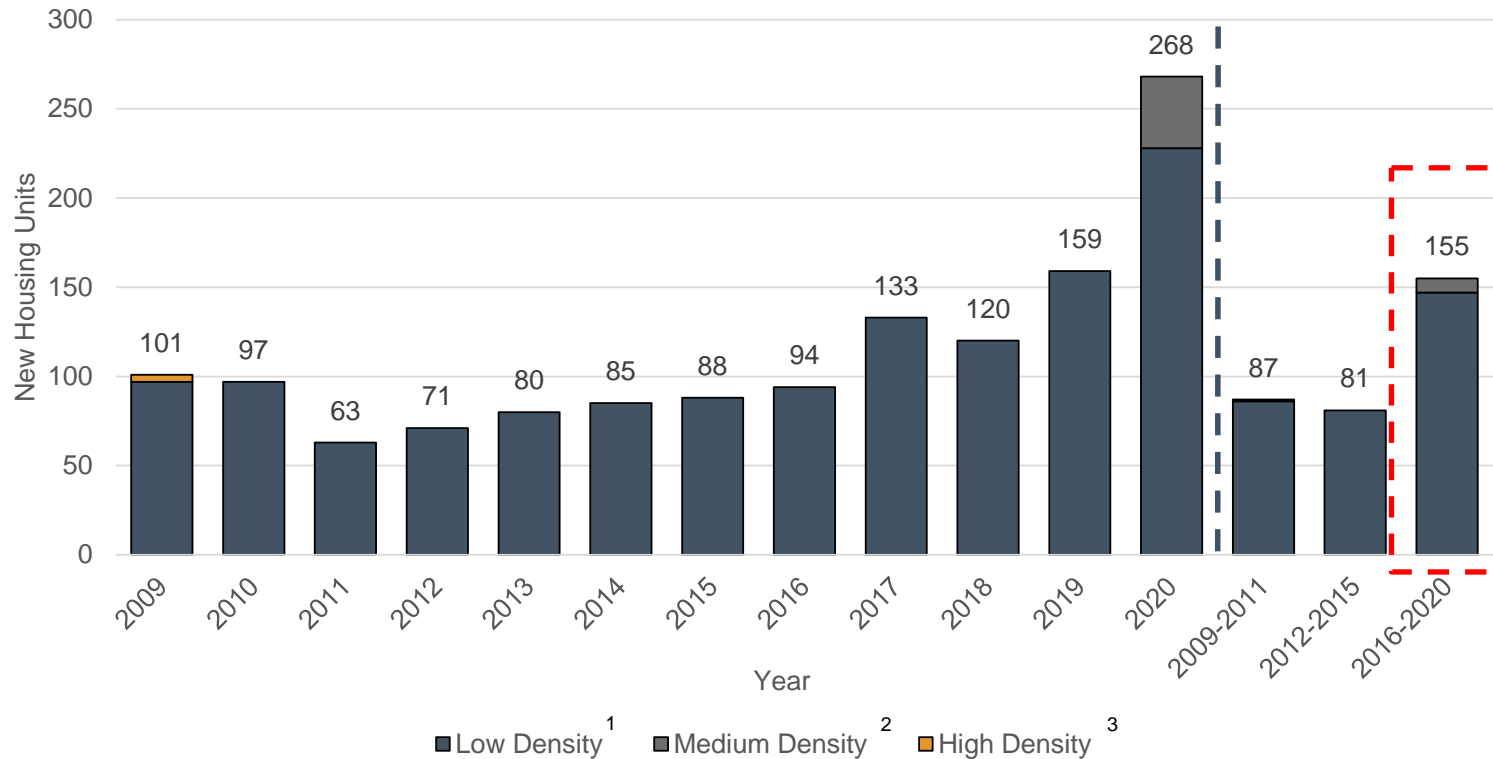


# Municipality of Middlesex Centre

## Long-Term Population, Housing and Employment Forecast



# Municipality of Middlesex Centre Historical Residential Building Permits



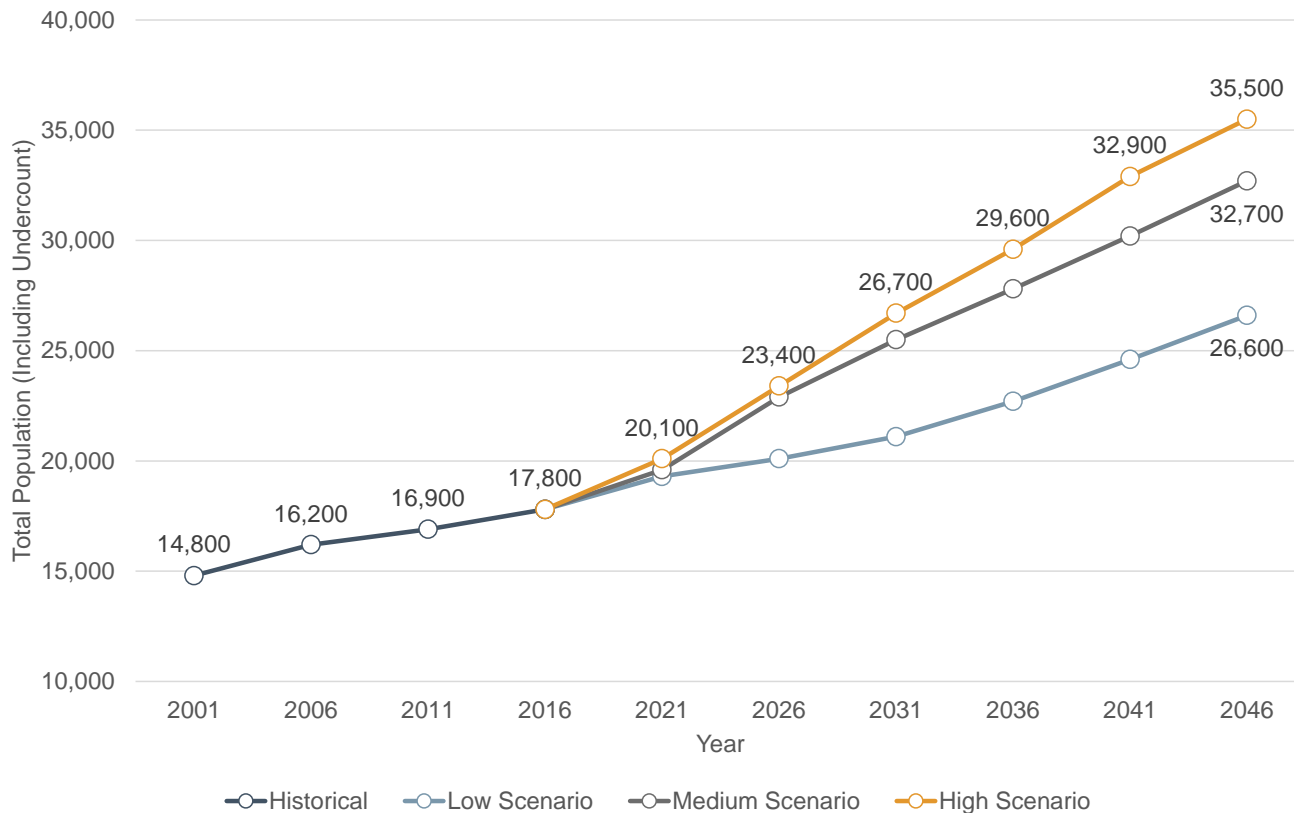
Recent building permit activity suggests ***housing growth will remain strong.***

Source: Historical building permit activity from Statistics Canada for Middlesex Centre, 2009 to 2020 by Watson & Associates Economists Ltd., 2021.

Note: 2020 is an estimate.



# Municipality of Middlesex Centre Long-Term Population Forecast, 2016 to 2046



2016 to 2046  
Annual Growth Rates

Low  
Scenario:  
**1.3%**

Medium  
Scenario:  
**2.0%**

High  
Scenario:  
**2.3%**

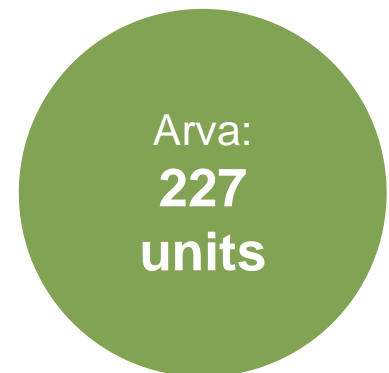
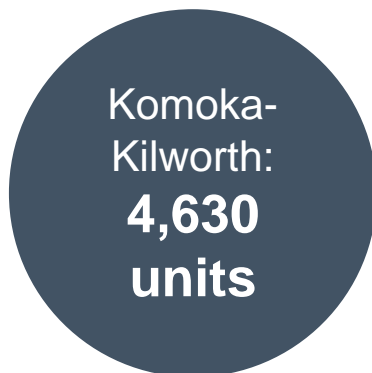
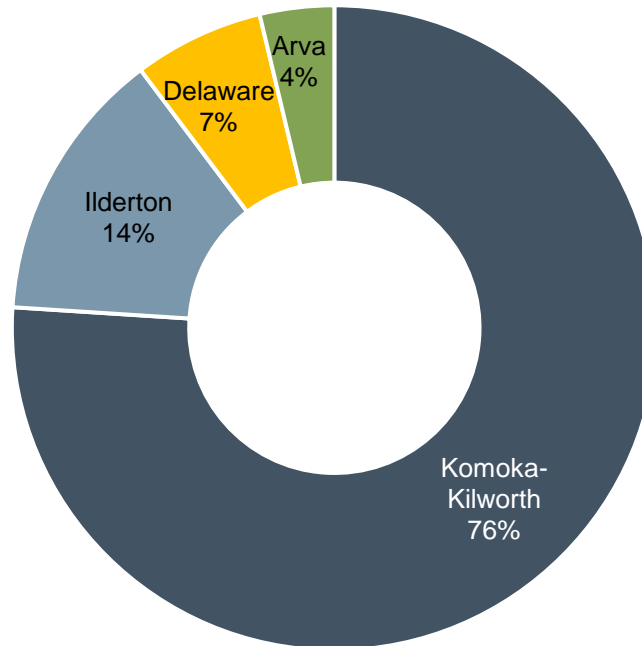
**High Scenario is the Preferred Reference Scenario**



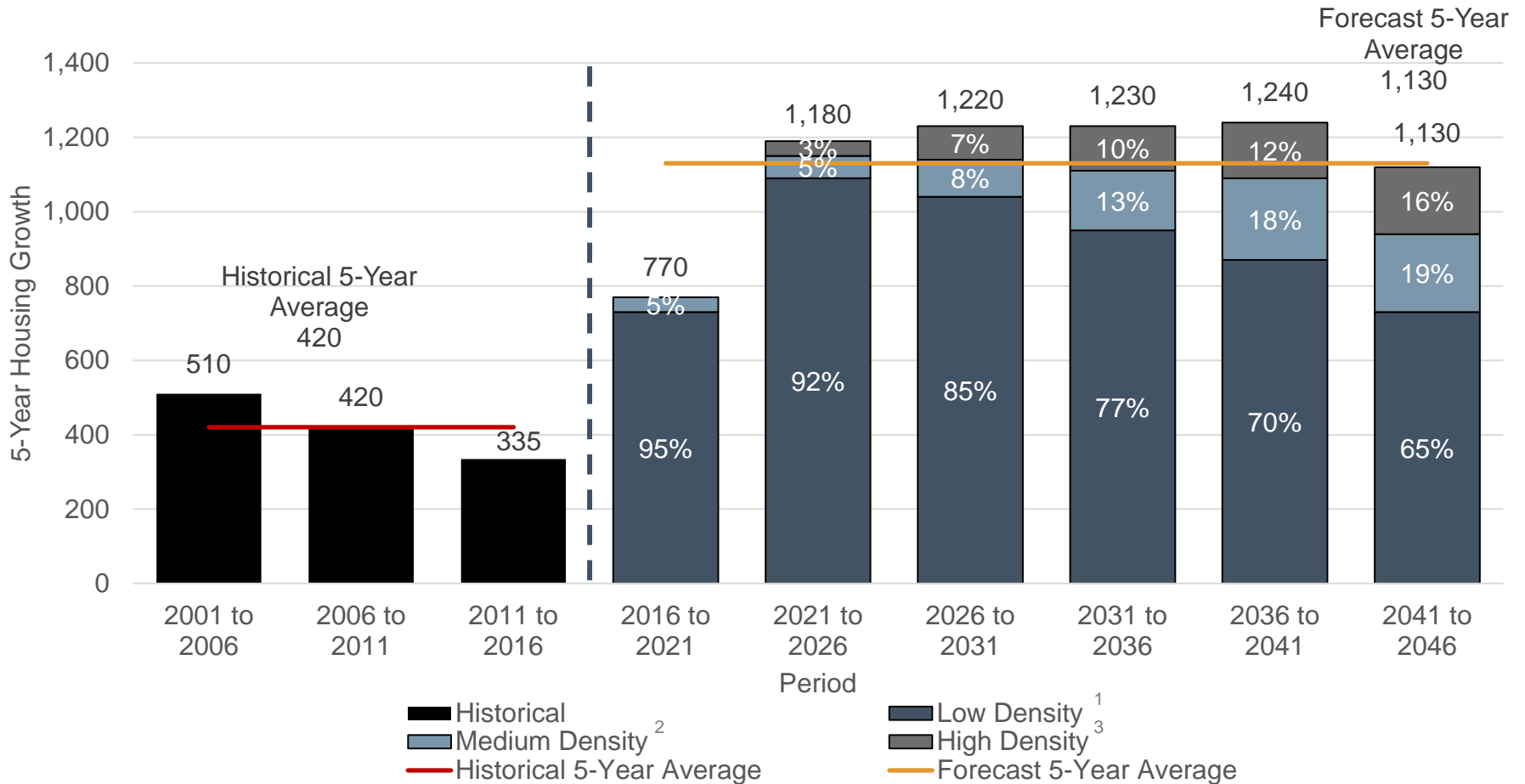
# Municipality of Middlesex Centre

## Share of Residential Housing Supply by Area

Active *large subdivision developments* in the planning approvals process suggests that *housing growth will remain strong.*



# Municipality of Middlesex Centre Long-Term Housing Forecast, 2016 to 2046



Source: 2001 to 2016 historical data from Statistics Canada Census Profiles for Middlesex Centre. Forecast prepared by Watson & Associates Economists Ltd., 2021.

Note: Figures may not add precisely due to rounding.

<sup>1</sup> Includes all single and semi-detached homes as well as "other" detached homes as per Statistics Canada.

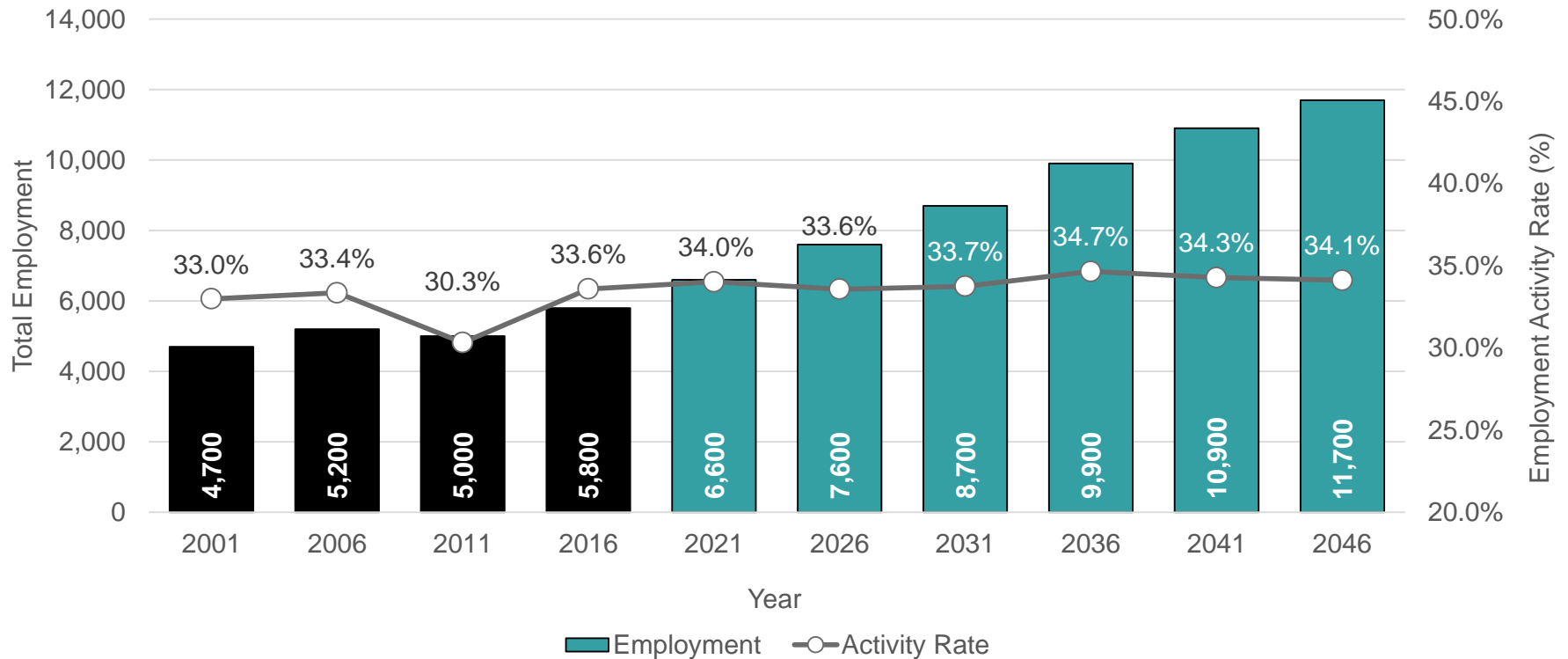
<sup>2</sup> Includes all townhomes and apartments in duplex.

<sup>3</sup> Includes all apartments with less than or greater than five storeys



# Municipality of Middlesex Centre

## Long-Term Employment Forecast, 2016 to 2046



### High Scenario is the Preferred Reference Scenario

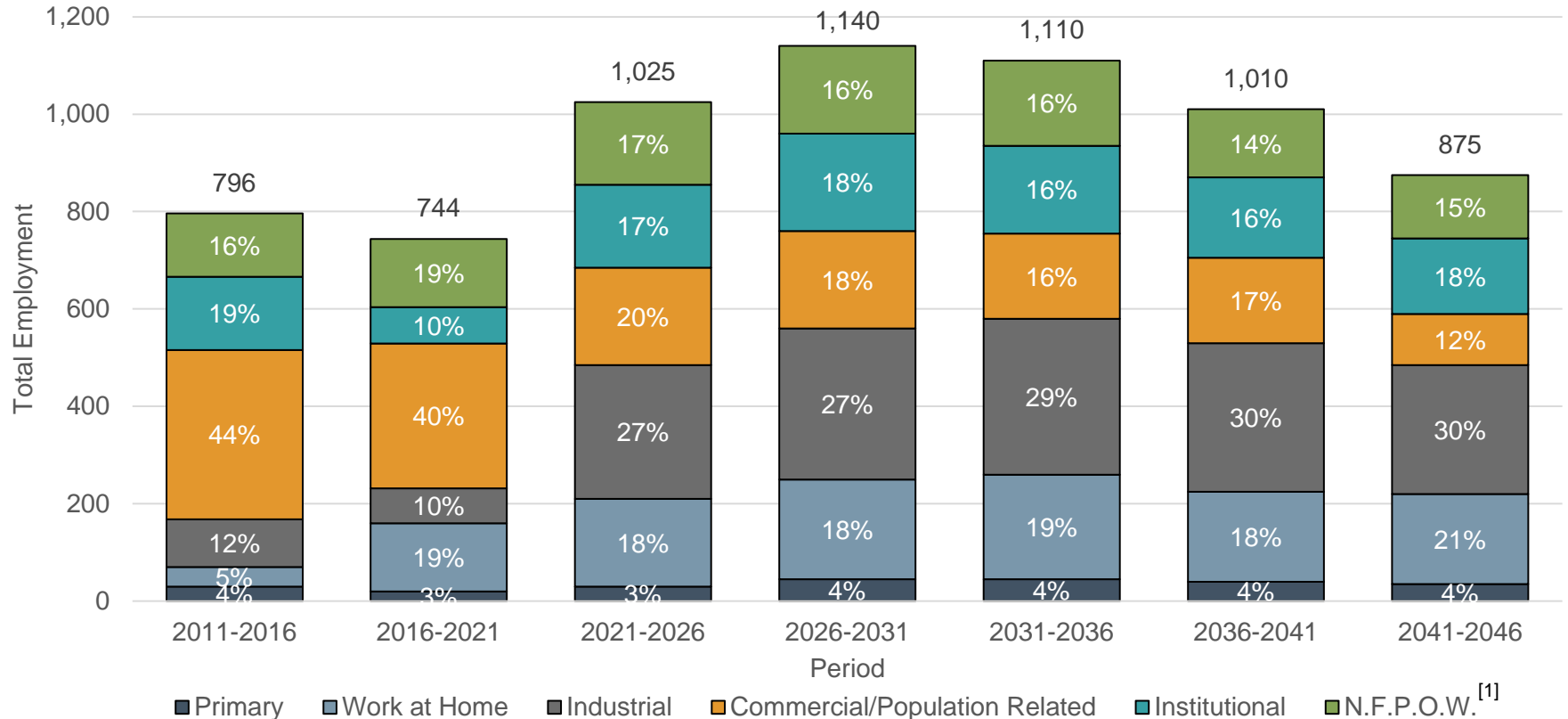
Source: Historical 2001 to 2016 from Statistics Canada place of work data. Forecast 2021 to 2046 prepared by Watson & Associates Economists Ltd., 2021.

Note: Figures have been rounded. Employment figures include work at home and No Fixed Place of Work (N.F.P.O.W.) defined by Statistics Canada 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.



# Municipality of Middlesex Centre Long-Term Employment Forecast by Sector,

## 2016 to 2046



Source: Historical data derived from custom order Statistics Canada Place of Work Data. Forecast by Watson & Associates Economists Ltd., 2020.

<sup>[1]</sup> 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.

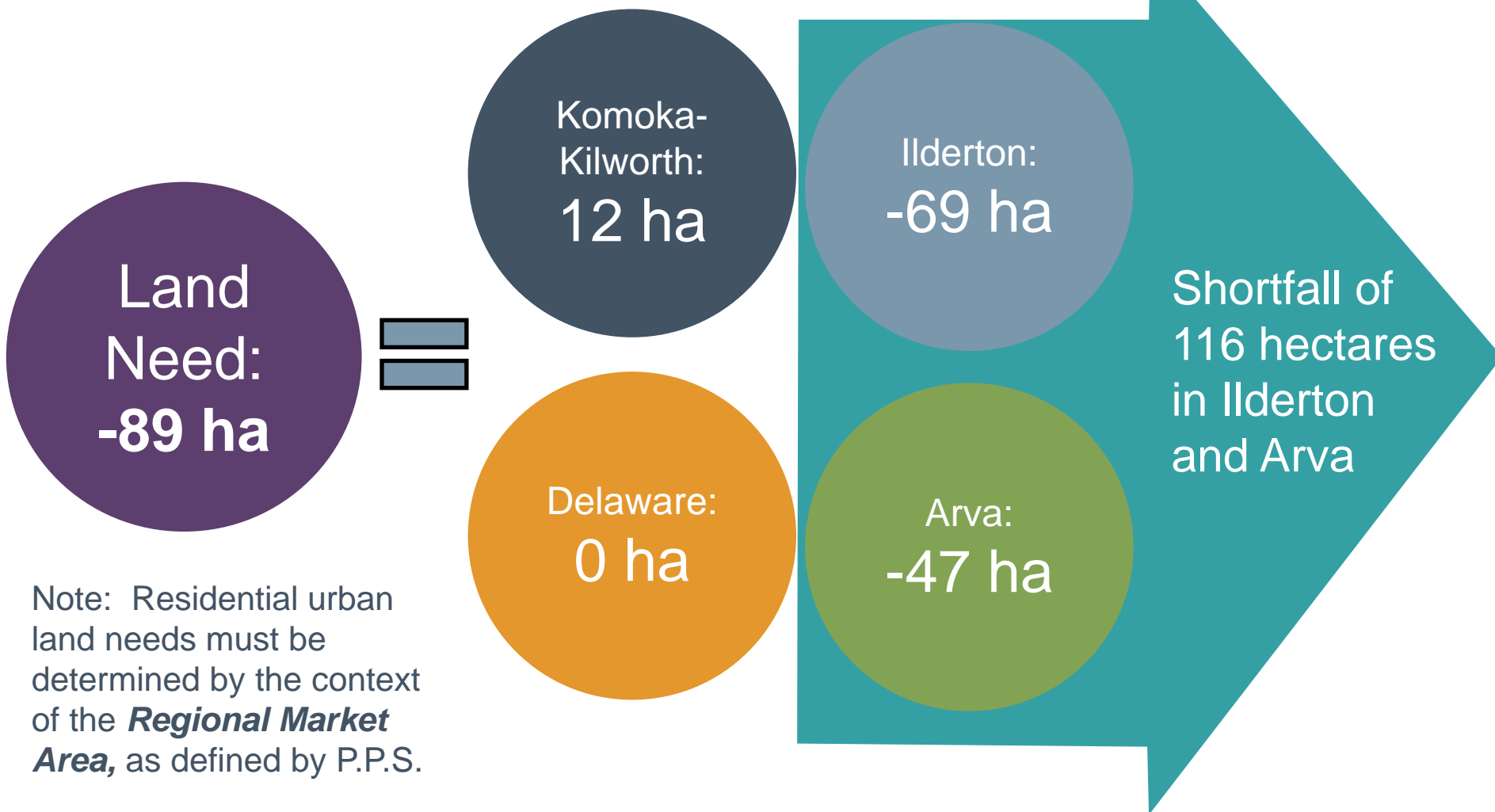
Note: Numbers may not add up precisely due to rounding.

# Municipality of Middlesex Centre

## Urban Land Needs Analysis

# Municipality of Middlesex Centre

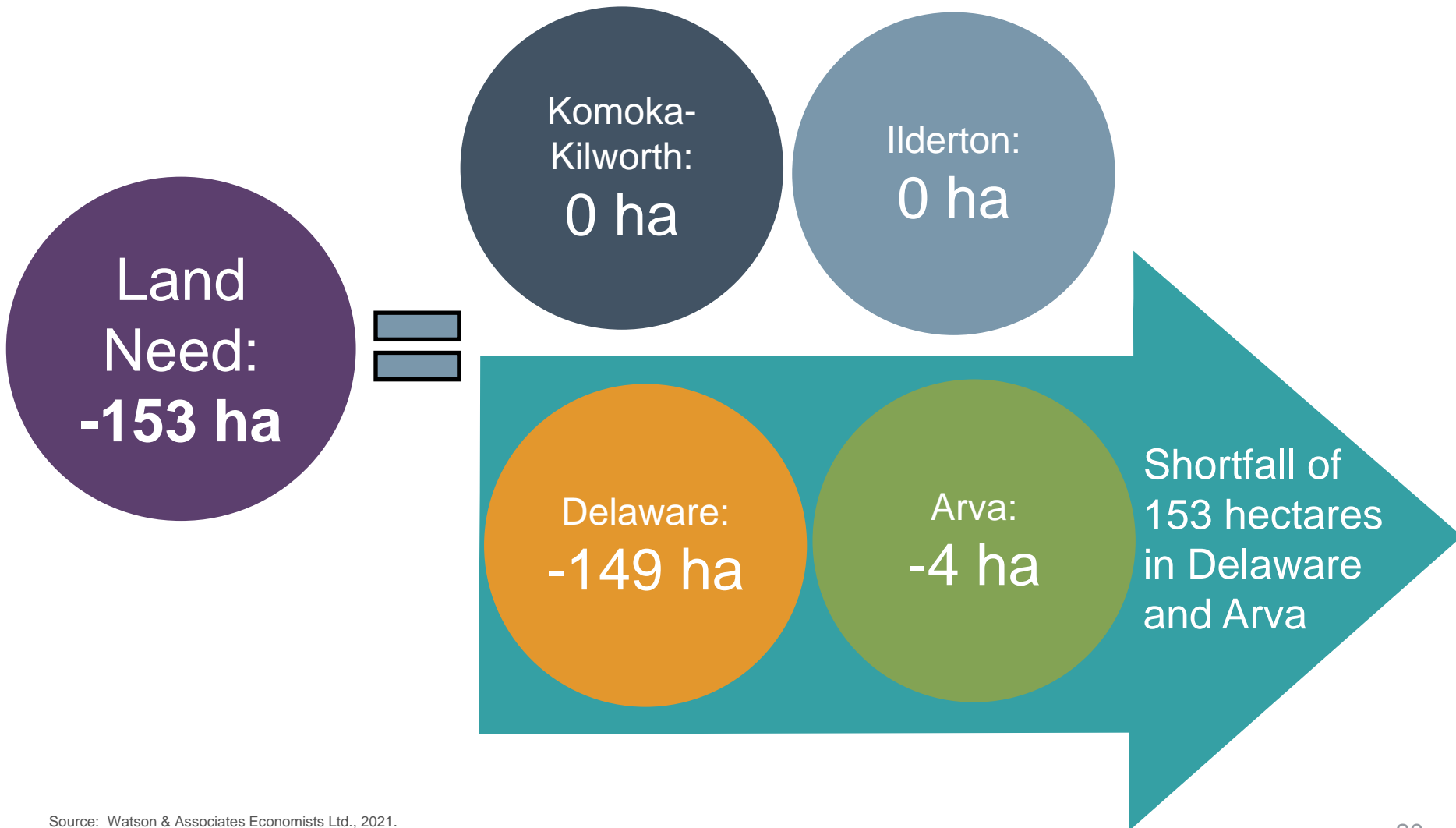
## Urban Residential Land Needs



Note: Residential urban land needs must be determined by the context of the **Regional Market Area**, as defined by P.P.S.

# Municipality of Middlesex Centre

## Urban Employment Land Needs

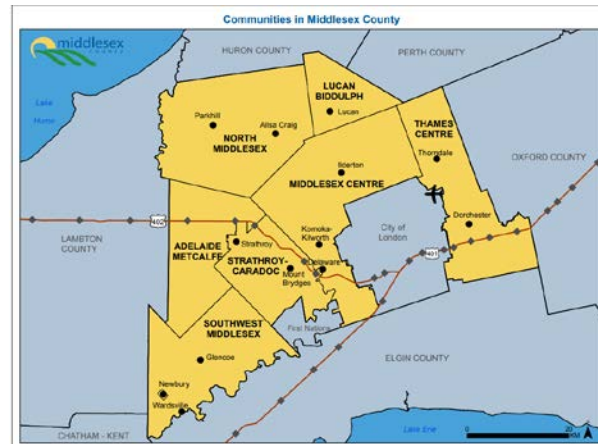
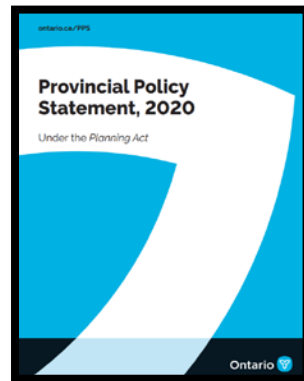




# Municipality of Middlesex Centre

## Urban Land Needs

- What does this mean for Middlesex Centre?
  - In accordance with the P.P.S., 2020, the **regional market area** refers to an area that has a high degree of social and economic interaction. **The upper- or single-tier municipality**, or planning area, **will normally serve as the regional market area**. Where a regional market area extends significantly beyond these boundaries, however, then the regional market area may be based on the larger market area. Where regional market areas are very large and sparsely populated, a smaller area, if defined in an official plan, may be utilized.



Thank You

Question/Comments?