

**Town of Lakeshore  
Official Plan Review  
Growth Analysis Study**

November 27, 2015



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 **Planning for growth**

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## List of Acronyms and Abbreviations

G.D.P.	Gross Domestic Product
G.F.A.	Gross Floor Area
G.I.S.	Geographic Information Systems
ha	hectare
I.C.I.	Industrial, Commercial, Institutional
L.Q.	Location Quotient
N.A.I.C.	North American Industrial Classification
O.P.	Official Plan
P.P.U.	Persons per Unit
sq.ft.	square feet
U.S.	United States

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# Executive Summary

## Terms of Reference

MMM Group, in association with Watson & Associates Economists Ltd., were retained in the fall of 2015 by the Town of Lakeshore to undertake an Official Plan (O.P.) Review for the Town. As a key component of this review, the following growth analysis study will guide decision-making specifically related to land-use planning and growth management, infrastructure planning/phasing and municipal finance to the year 2031. More specifically, this study provides the following:

- A brief overview of recent economic trends within the Windsor-Essex Region and the Town of Lakeshore;
- Anticipated long-term housing and population growth for the Town of Lakeshore by Key Growth Area;
- Forecast long-term employment growth for the Town of Lakeshore by major sector; and
- An assessment of the Town's long-term urban employment land needs to the year 2031 based on anticipated demand and identified vacant employment land supply as of mid-year 2015.

This report represents an update to the population, household and employment forecast prepared for the Town in April, 2006.<sup>1</sup> It is noted that the Town-wide population, housing and employment forecast provided herein has been derived from the Essex County August 2011 Foundation Report: Essex County Official Plan (O.P.) Review, hereafter referred to as the Foundation Report.<sup>2</sup> As summarized in the County of Essex O.P., the County has adopted the Low Growth Scenario provided in the Foundation Report.<sup>3</sup>

In accordance with the Essex-County Foundation Report (Low Growth Scenario), the Town of Lakeshore is forecast to experience moderate population and employment growth to the year 2031. The following provides a summary of the key findings provided in this report.

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<sup>1</sup> Town of Lakeshore, Population, Household and Employment Forecast, Final Report. April 6, 2006.

<sup>2</sup> Foundation Report: Essex County Official Plan Review. The County of Essex, August 2011. N. Barry Lyon Limited.

<sup>3</sup> County of Essex Official Plan. Adopted February 19, 2014. Approved by MMAH April 28, 2014.



## **Provincial, Regional and Local Economic Trends**

The Ontario economy is facing significant structural changes. Over the past decade, the economic base, as measured by G.D.P. output, has shifted from goods-producing sectors (i.e. manufacturing, utilities and primary) to the service sector. Similar to the provincial economy as a whole, the nature of the Windsor-Essex Area economy is also changing.

For the Town of Lakeshore, established and emerging knowledge-based sectors such as professional, scientific and technical services, health care and social services, advanced manufacturing, education, training and research and agri-business are anticipated to represent key employment growth sectors. Over the forecast period, an increasing percentage of these sectors are anticipated to be located on employment lands.

While manufacturing remains vitally important to the provincial and regional economies with respect to jobs and economic output, this sector is not anticipated to support strong domestic labour force growth in the future. Looking forward, there will continue to be a manufacturing focus in the Windsor-Essex Area, including the Town of Lakeshore; however, industrial processes have become more capital intensive and automated as local industries are required to streamline production through increased product innovation, specialization and integration of technology. This means that as the domestic manufacturing sector continues to gradually recover, employment growth is anticipated to be modest.

Increased outsourcing of manufacturing production to emerging global markets will also continue to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced both locally and imported from abroad. This continues to drive demand for increasingly larger warehousing facilities, typically located in competitively priced greenfield locations within the Windsor-Essex Area with proximity/access to Highway 401. Generally, the physical attributes of the Town's Employment Areas (i.e. proximity/access to Highway 401) are desirable to the transportation and warehousing and wholesale trade sectors.

## **Impact of Evolving Economic Trends on Planning for Employment Lands in the Town of Lakeshore**

In many respects Lakeshore's long-term employment potential is largely tied to the success of the Windsor-Essex Area as a whole. For many international and locally-based industries, the Town of Lakeshore has a strong appeal given its access to

regional infrastructure and physical attributes (i.e. Highway 401-series, proximity to the U.S. border, rail access, access to labour, proximity to the U.S. employment markets, and potential synergies within nearby post-secondary institutions).

Notwithstanding the positive attributes, regional competition for the talent necessary to support innovation, investment and entrepreneurship is fierce. The degree to which the Town of Lakeshore can capitalize on its regional location advantages will depend largely on the competitiveness of its employment lands. Key to the Town's competitive position in this regard is an ample supply of "shovel-ready" employment lands<sup>4</sup> which is well-aligned with market demands in terms of location, zoning and size requirements.

In response to evolving economic trends, there is increasing demand to accommodate employment-supportive commercial and community uses on employment lands, particularly in business parks which offer amenities and services convenient to local businesses and their employees. Furthermore, it is important that both existing and new Employment Areas are developed with sufficient critical mass and diversity to create a sense of place and vibrancy that will continue to attract industry, investment and a growing labour force pool to the Town. In turn, this will continue to enhance the Town's economic competitiveness and quality of life for its local residents.

### **Forecast Population, Housing and Employment Growth**

The following provides a summary of the key population, housing and employment growth trends anticipated for the Town of Lakeshore between 2015 and 2031.

- The Town's population is forecast to increase by approximately 4,800 persons over the forecast period, growing from 36,200 in 2015 to 41,000 in 2031. This represents an annual average increase of 0.8%. Comparatively, the Province of Ontario as a whole is forecast to increase at an annual average rate of 1.6% between 2016 and 2031.
- Lakeshore's housing base is forecast to increase from approximately 13,190 in 2015 to 15,120 in 2031, an increase of 1,930 or 0.9% annually.
- Average housing occupancy levels or P.P.U.s have declined in the Town of Lakeshore from 2.91 in 2001 to 2.80 in 2011. Over the forecast period, this declining trend is expected to continue, however, average P.P.U. levels are anticipated to stabilize during the post-2031 period.

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<sup>4</sup> "Shovel-ready" lands are defined as those that are serviced, zoned and available for development within the next 6 months.

- The majority of new housing construction is anticipated to be oriented towards low-density housing forms (i.e. single and semi-detached homes), comprising 85% of the new residential construction between 2015 and 2031. Over the forecast period, the share of medium-density and high-density housing forms is anticipated to gradually increase, largely driven by the aging of the babyboomers.
- The Town's employment base is forecast to increase from 10,450 in 2015 to 15,180 in 2031, an increase of 4,730 or just under 300 jobs annually.
- Over the forecast period, the Town's employment activity rate (i.e. ratio of jobs per population) is expected to steadily increase from 29% in 2015 to 37% in 2031.

### **Town of Lakeshore Long-term Employment Lands Needs**

In accordance with forecast employment growth and net developable employment land supply, the following conclusions can be made regarding the Town's long-term employment land needs.

- The Town of Lakeshore has 198 net ha (489 net acres) of vacant, potentially developable employment land. Despite the availability of vacant employment land, the Town currently has a limited number of serviced, large, vacant, industrial parcels conducive for larger-scale industrial development.
- Over the 2015 to 2031 planning horizon, the Town is forecast to add a total of approximately 2,350 jobs on its designated employment lands. To accommodate this employment growth, Lakeshore is forecast to absorb 79 net ha (195 net acres) of employment lands, or 5 net ha (12 net acres) annually.
- Based on the Town's existing supply of developable vacant employment land, Lakeshore has a sufficient supply of employment lands to meet long-term employment land needs to 2031, assuming the Town's developable designated employment lands are serviced in a timely manner.

### **Recommendations**

- Building on baseline data provided herein, it is recommended that the Town monitor its employment land supply on a regular basis (i.e. annually).
- To ensure that Lakeshore's employment land supply levels are not unduly constrained, it is recommended that the Town strive to provide a minimum five-year supply of designated and serviced employment lands at all times. This

should include a range of site selection choices by parcel configuration, designation, zoning and location.<sup>5</sup>

- It is recommended that the Town's residential and non-residential land needs are comprehensively reviewed and updated in accordance with the Town's O.P. review schedule.

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<sup>5</sup> In accordance with forecast demand.

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# 1. Introduction

## 1.1 Terms of Reference

MMM Group, in association with Watson & Associates Economists Ltd., were retained in the fall of 2015 by the Town of Lakeshore to undertake an Official Plan (O.P.) Review for the Town. As a key component of this review, the following growth analysis study will guide residential and non-residential development within the Town to the year 2031. More specifically, this study provides the following:

- A brief overview of recent economic trends within the Windsor-Essex Region and the Town of Lakeshore;
- Anticipated long-term housing and population growth for the Town of Lakeshore by Key Growth Area;
- Forecast long-term employment growth for the Town of Lakeshore by major sector; and
- An assessment of the Town's long-term urban employment land needs to the year 2031 based on anticipated demand and identified vacant employment land supply as of mid-year 2015.

The results of the analysis provided herein are intended to assist in decision-making specifically related to land-use planning and growth management, infrastructure planning/phasing and municipal finance for the Town of Lakeshore.

## 1.2 Background

This report represents an update to the population, household and employment forecast prepared for the Town in April, 2006.<sup>6</sup> It is noted that the Town-wide population, housing and employment forecast provided herein has been derived from the Essex County August 2011 Foundation Report: Essex County Official Plan (O.P.) Review, hereafter referred to as the Foundation Report.<sup>7</sup> As summarized in the County of Essex O.P., the County has adopted the Low Growth Scenario provided in the Foundation Report.<sup>8</sup>

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<sup>6</sup> Town of Lakeshore, Population, Household and Employment Forecast, Final Report. April 6, 2006.

<sup>7</sup> Foundation Report: Essex County Official Plan Review. The County of Essex, August 2011. N. Barry Lyon Limited.

<sup>8</sup> County of Essex Official Plan. Adopted February 19, 2014. Approved by MMAH April 28, 2014.

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## 2. Review of Economic Trends

The following Chapter provides an overview of historical economic and socio-economic conditions for the Town of Lakeshore within the context of provincial and regional trends. This includes an analysis of the macro-economic factors which are anticipated to influence regional and local employment growth trends and corresponding demand for employment lands in the Town of Lakeshore over the next 15 years. It is noted that the historical time periods investigated vary, subject to data availability.

### 2.1 Ontario's Shifting Economic Structure

The Ontario economy is facing significant structural changes. Over the past decade, the economic base, as measured by G.D.P. output, has shifted from goods-producing sectors (i.e. manufacturing, utilities and primary) to the service sector. This trend includes growth in financial services, information technology, business services, health care and social services, government, information and cultural industries, education, training and research, and tourism, as well as retail and accommodation/food services.

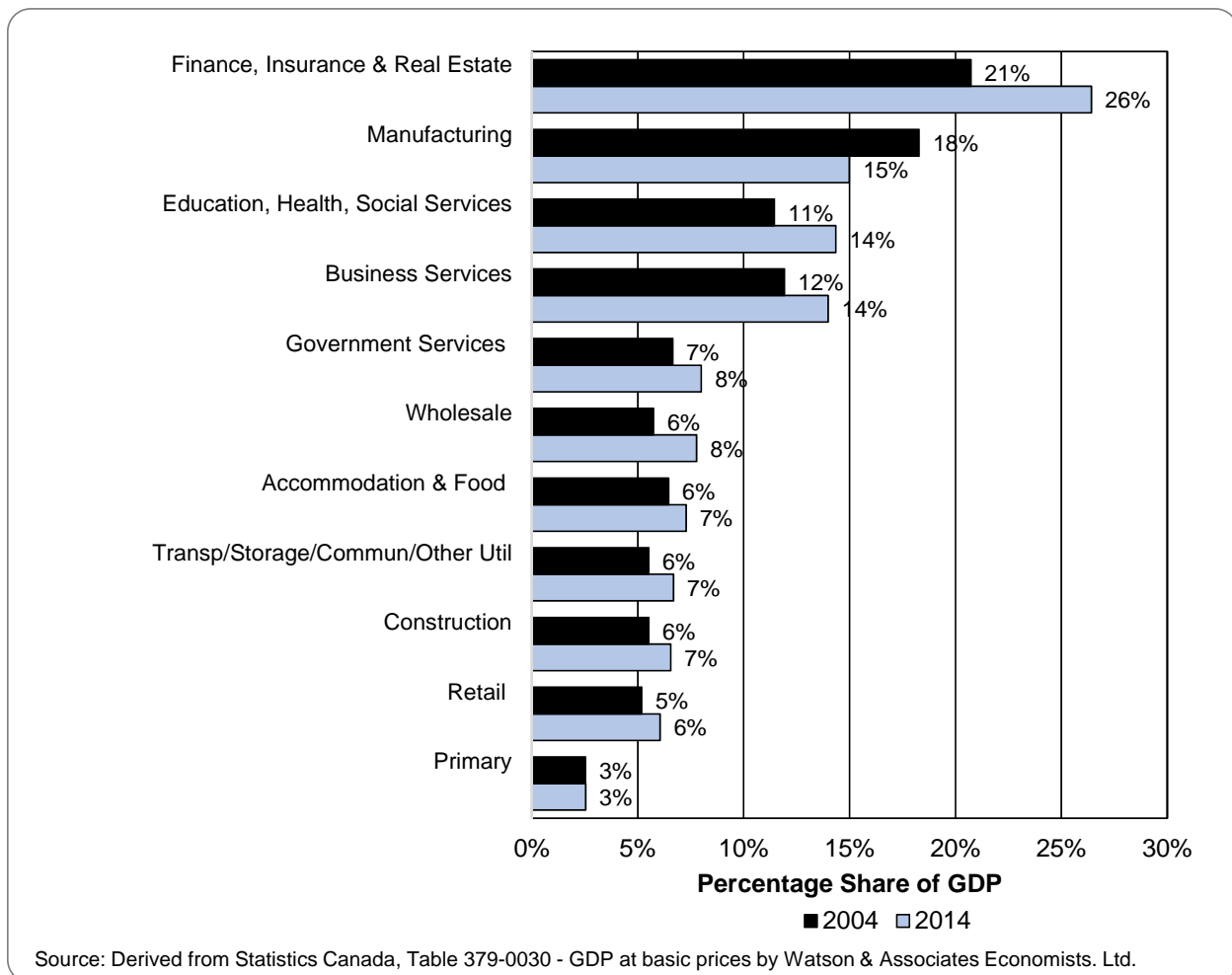
Much of this economic shift has occurred over the past ten years, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. As illustrated in Figure 2-1, the relative share of G.D.P. in the manufacturing sector declined from 18% in 2004 to 15% in 2014. The challenges of the manufacturing sector are also reflected in the Ontario labour force, which declined by 31% over the 2004 to 2014 period in the sector.<sup>9</sup> However, it is important to note that provincial labour force rates in the manufacturing sector have been relatively stable since 2010.

In contrast, service-based sectors, such as finance, insurance, real estate and business services have experienced significant employment increases over the past 10 years. Growth in the service-based sectors has been driven by strong growth in domestic demand, particularly in consumer spending.

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<sup>9</sup> Derived from Statistics Canada Labour Force Survey data by Watson & Associates Economists Ltd.

**Figure 2-1**  
**Province of Ontario**  
**Gross Domestic Product by Sector, 2004 and 2014**



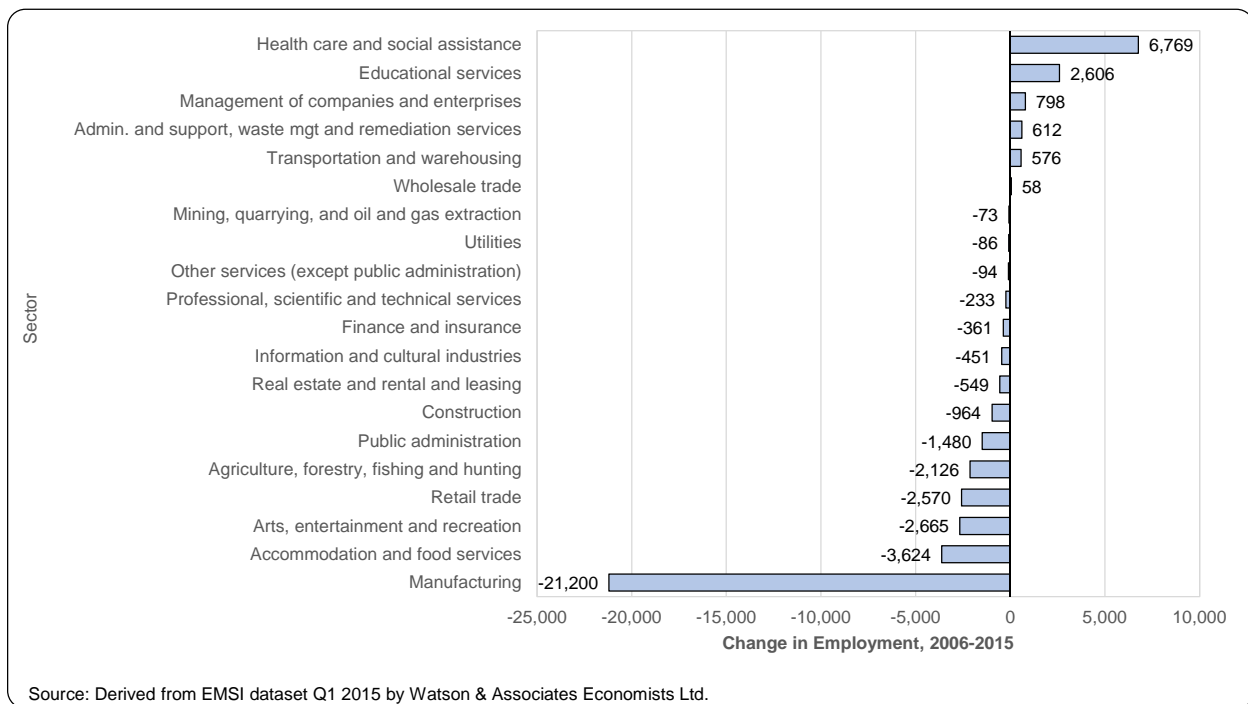
While manufacturing remains vitally important to the provincial and local economy with respect to jobs and economic output, this sector is not anticipated to support strong domestic labour force growth in the future. Looking forward, there will continue to be a manufacturing focus in Ontario; however, industrial processes have become more capital intensive and automated as local industries are required to streamline production through increased product innovation, specialization and integration of technology. This means that as the domestic manufacturing sector continues to gradually recover, employment growth is anticipated to be modest.

## 2.2 Regional Economic Trends

### 2.2.1 Windsor-Essex Area Employment Trends

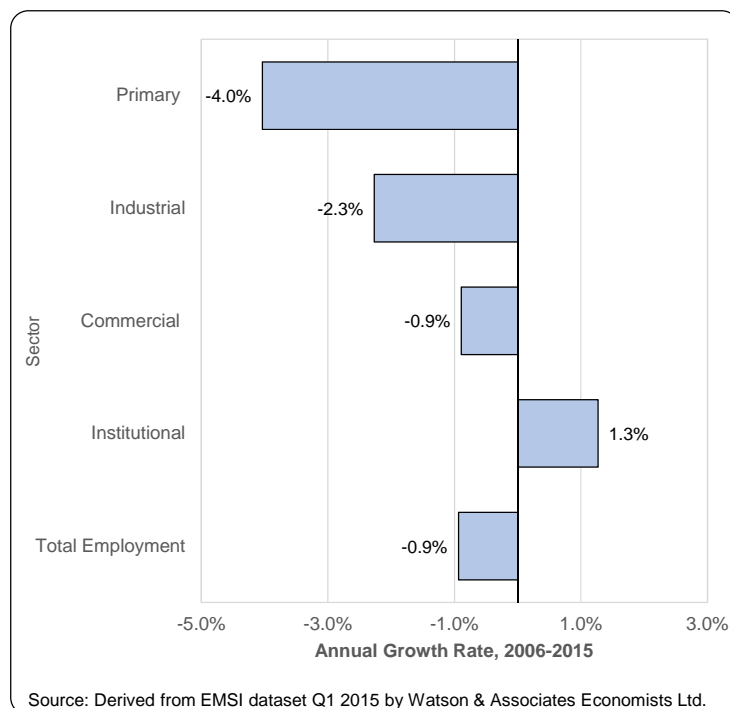
Figure 2-2 summarizes the change in employment by sector for the Windsor-Essex Area over the 1996 through 2015 period. As shown, the Windsor-Essex Area experienced a significant decrease in the number of employees in the manufacturing sector with a decrease of 21,200 jobs between 1996 and 2015. In contrast, institutional sectors, including health care and social assistance and educational services, experienced a steady increase in the number of jobs over the 1996 and 2015 period. Other notable employment growth sectors include management of companies and enterprises, administration and support, waste management and remediation services and transportation and warehousing. Overall, total employment in the Windsor-Essex Area decreased by 12,200 jobs between 1996 and 2015. As summarized in Figure 2-3, the average annual employment decline rate over the 1996 to 2015 period was -0.09%. All sectors, except the institutional sector, experienced a negative annual growth rate over the 1996 to 2015 period. The average annual growth rate for the industrial sector was -2.3%.

**Figure 2-2**  
**Windsor-Essex Area**  
**Change in Employment 1996 to 2015**





**Figure 2-3**  
**Windsor-Essex Area**  
**Change in Employment 1996 to 2015**



### ***2.2.2 Windsor-Essex County Area Industry Cluster Analysis***

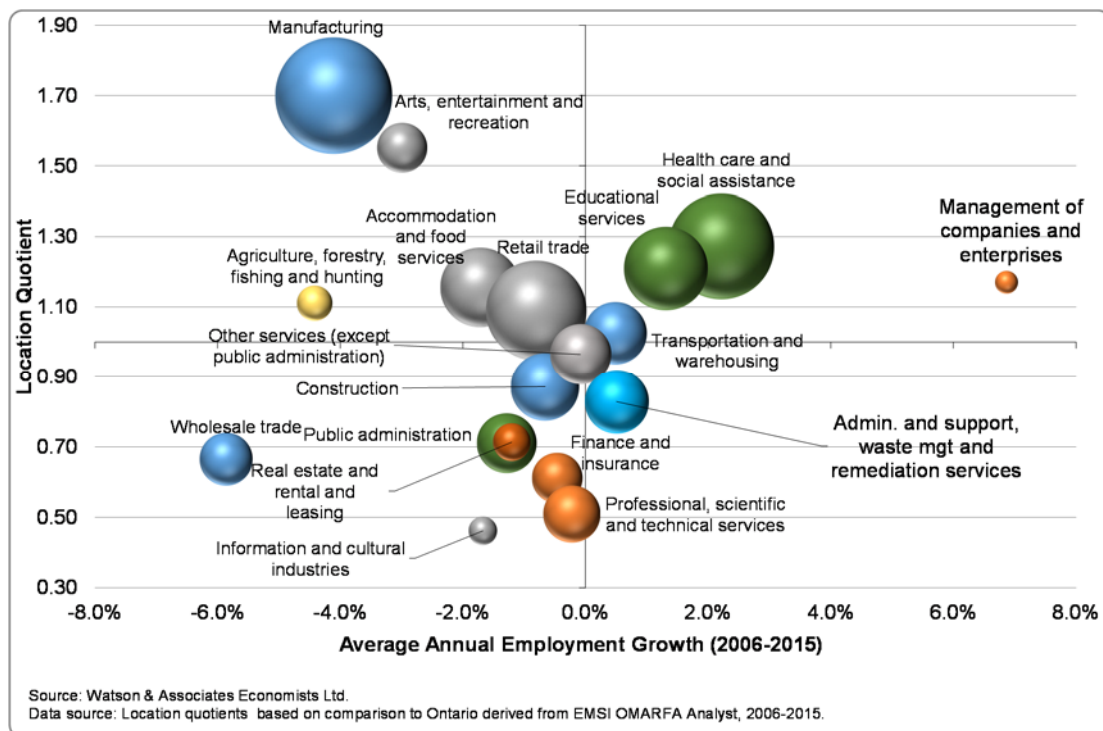
Location Quotients (L.Q.s) are a commonly used tool in regional economic analysis to identify and assess the relative strength of industry clusters.<sup>10</sup> They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. The L.Q. for a given municipality or local geographic area is calculated by dividing the percentage of total local employment by sector, by the percentage of total broader employment base by sector. An L.Q. of 100% identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. greater than 100% identifies that the concentration of employment in a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector. Employment sectors with a relatively high L.Q. generally serve both the local population base as well as employment markets which extend beyond the boundaries of the municipality. Alternatively, employment sectors with an L.Q. of less than 100% identify

<sup>10</sup> An employment cluster is defined as a set of inter-linked private sector industries and public sector institutions, whose final production reaches markets outside the region. Thus, the cluster approach to economic development reflects in some way a more traditional focus on the export base of a region.

particular employment sectors which have relatively lower concentration and are generally under-servicing the needs of the local economy.

Figure 2-4 summarizes the concentration of employment clusters in the Windsor-Essex Area relative to the Province. Figure 2-4 also illustrates the relative size of each industry cluster and its average annual employment growth rate between 2006 and 2015. As illustrated, the Windsor-Essex Area has a strong presence in health care and social assistance, educational services and retail trade. The manufacturing sector also has a strong presence, representing the largest sector in the area; however, this sector experienced a steady decline in employment over the period. Management of companies and enterprises, while small in terms of employment, is the only employment sector oriented to office development that has a relatively high employment concentration in the area and has experienced strong growth over the 1996 to 2015 period. Other commercial sectors, including accommodation and food services, and arts, entertainment and recreation are highly concentrated in the area; however, these sectors have experienced a decline in employment over the period.

**Figure 2-4**  
**Windsor-Essex Area**  
**Industry Cluster Size and Growth Matrix**

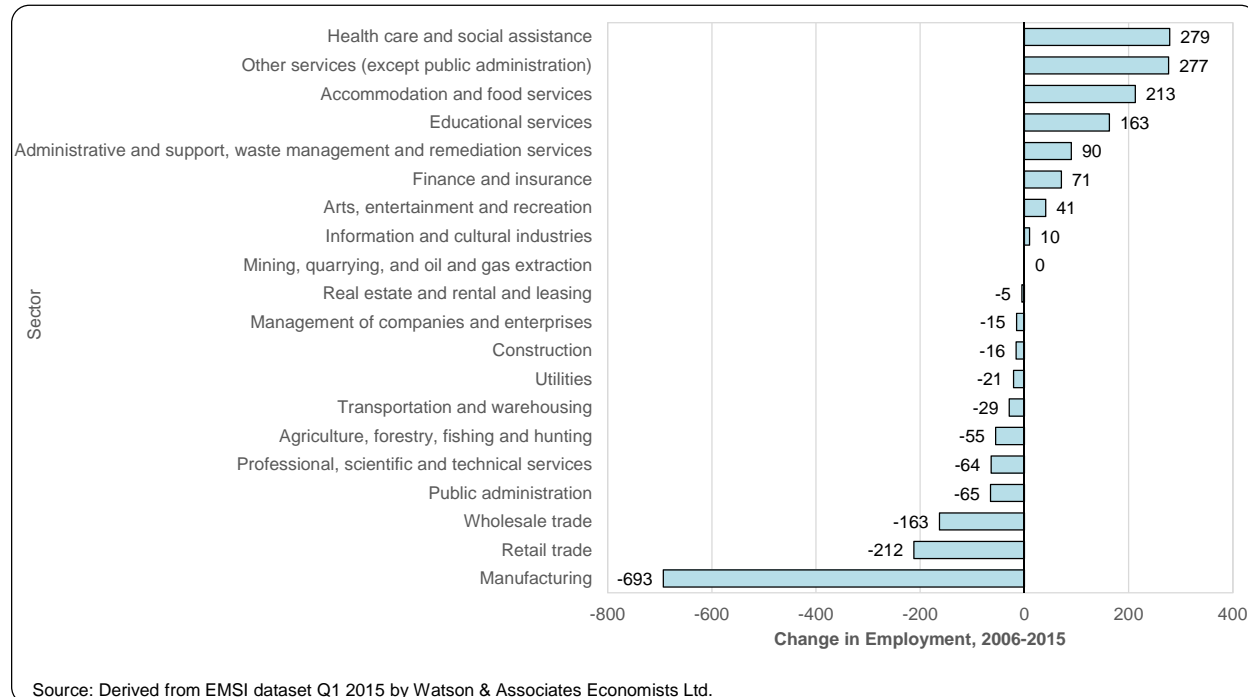


## 2.3 Local Economic Trends

### 2.3.1 Employment Growth Trends by Sector

Figure 2-5 summarizes the change in employment by sector for the Town of Lakeshore from 1996 through 2015. As shown, the Town of Lakeshore experienced a decline in the number of employees in the manufacturing sector with a decrease of approximately 700 jobs between 1996 and 2015. Institutional and population-related sectors, including health care and social assistance, educational services, other services (except public administration), accommodation and food services, and arts, entertainment and recreation, experienced modest to strong job growth over the 1996 to 2015 period. Other industrial and knowledge-based sectors, including administrative and support, waste management and remediation services, finance and insurance, and information and cultural industries, experienced moderate employment growth over the past decade. Overall total employment in the Town of Lakeshore decreased modestly by approximately 190 jobs between 1996 and 2015.

**Figure 2-5**  
**Town of Lakeshore**  
**Change in Employment by Sector, 2006 to 2015<sup>11</sup>**



<sup>11</sup> Excludes No Fixed Place of Work and Work at Home Employment.

### ***2.3.2 Lakeshore Industry Cluster Analysis***

Figure 2-6 summarizes the concentration of employment within the Town of Lakeshore relative to the Windsor-Essex Area. Similar to Figure 2-4, the relative size and rate of employment growth by industry cluster over the 2006 to 2015 period are also summarized.

As illustrated, the following industry clusters have a relatively high concentration within the Town of Lakeshore:

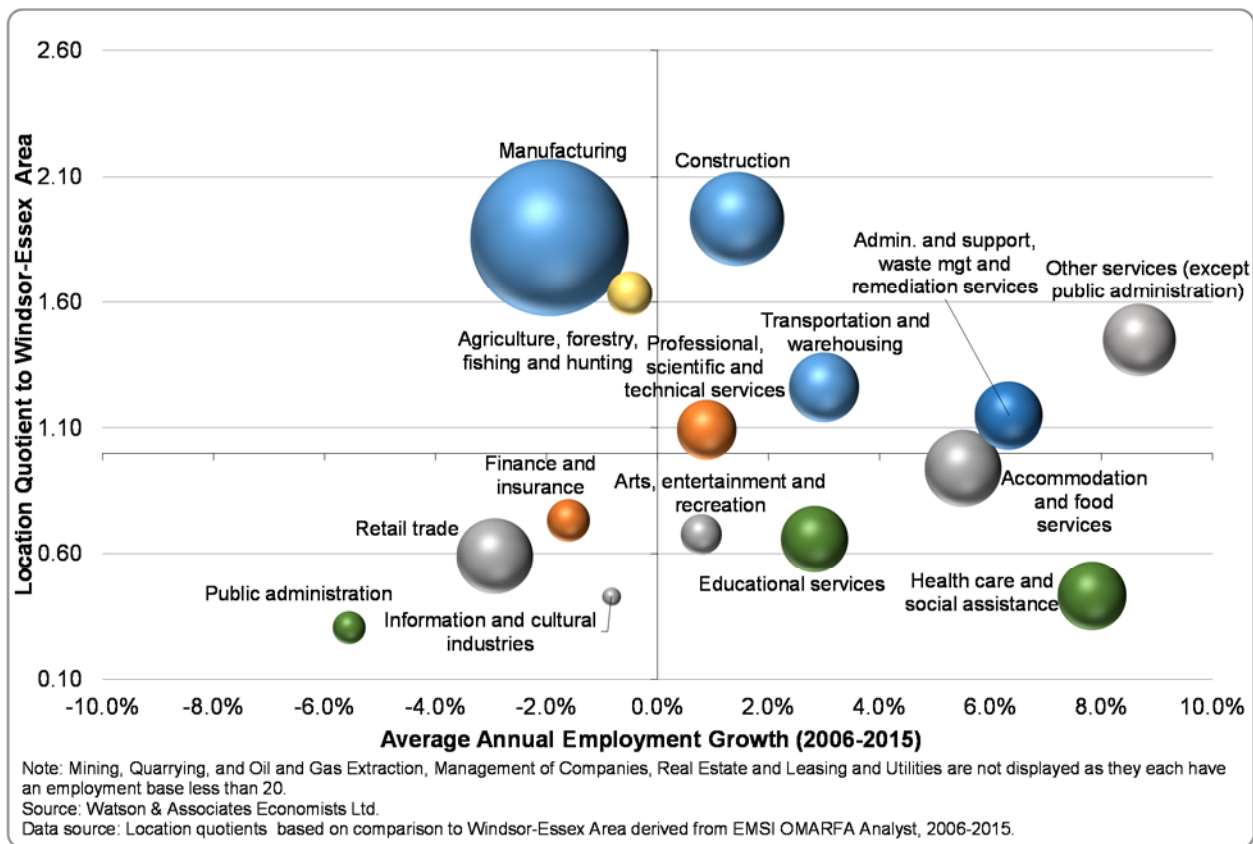
- Manufacturing;
- Construction;
- Transportation and warehousing;
- Professional, scientific and technical services;
- Administration and support, waste management and remediation services;
- Agriculture (agri-business); and
- Other services.

It is noted that while the Town has experienced a decline in the manufacturing employment sector, this decline has not been as severe as that in the Windsor-Essex Area. The annual employment growth rate of the manufacturing sector over the 2006 to 2015 period in the Town of Lakeshore was -1.9%, compared to -4.1% for the Windsor-Essex Area.

While not highly concentrated in the Town of Lakeshore, the following industry clusters represent emerging growth sectors for the Town:

- Arts, entertainment and recreation;
- Educational services (including training and research);
- Accommodation and food services; and
- Health care and social assistance.

**Figure 2-6  
Town of Lakeshore  
Industry Cluster Size and Growth Matrix**



### 2.3.3 Historical Non-Residential Building Permit Activity by ICI, 2010 to 2014

Figure 2-7 summarizes non-residential building construction by industrial, commercial and institutional sector (I.C.I.) for the Town of Lakeshore during the 2010 to 2014 period, expressed in gross floor area (G.F.A.) in square feet (sq.ft.). As shown, the Town of Lakeshore has averaged 113,000 sq.ft. of non-residential building activity over the 2010 to 2014 period. Construction of industrial buildings accounted for 47% of recent non-residential activity, while construction activity related to commercial and institutional development accounted for 30% and 23%, respectively. Over half (54% of G.F.A.) the non-residential building activity has been accommodated through additions/expansions of existing buildings. The majority of development (82% of G.F.A.) associated with additions/expansions to existing buildings has occurred within the industrial sector.

**Figure 2-7  
Town of Lakeshore  
Annual G.F.A. Development Activity (Sq.ft.)  
by I.C.I. Sectors, 2010 to 2014**

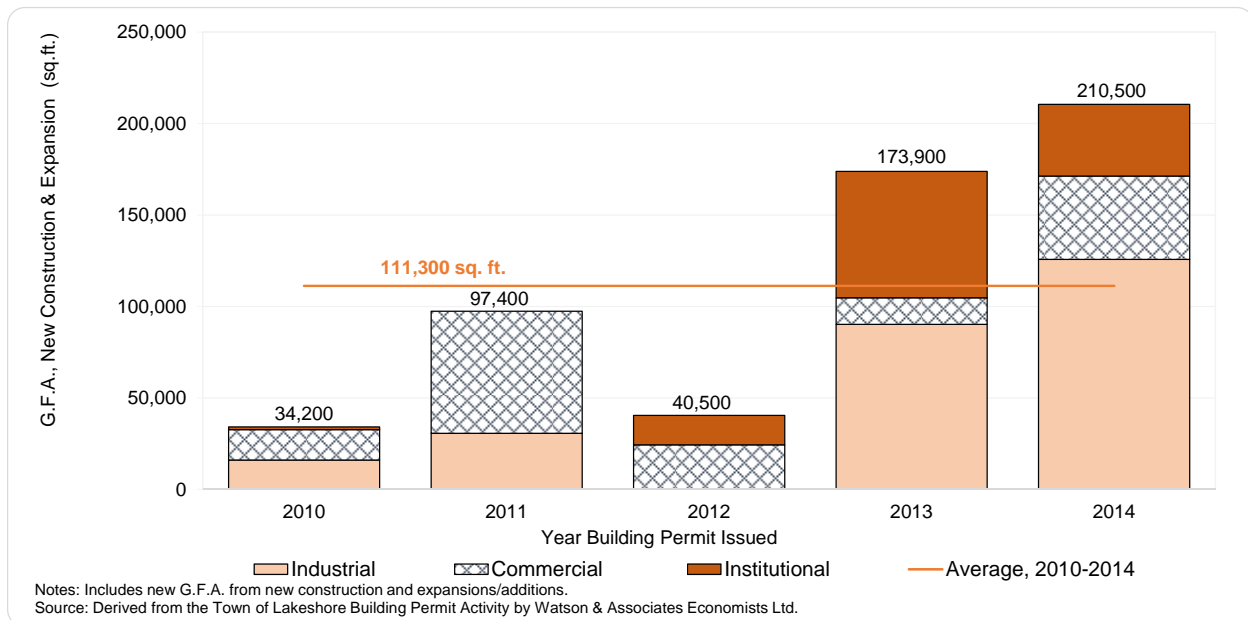
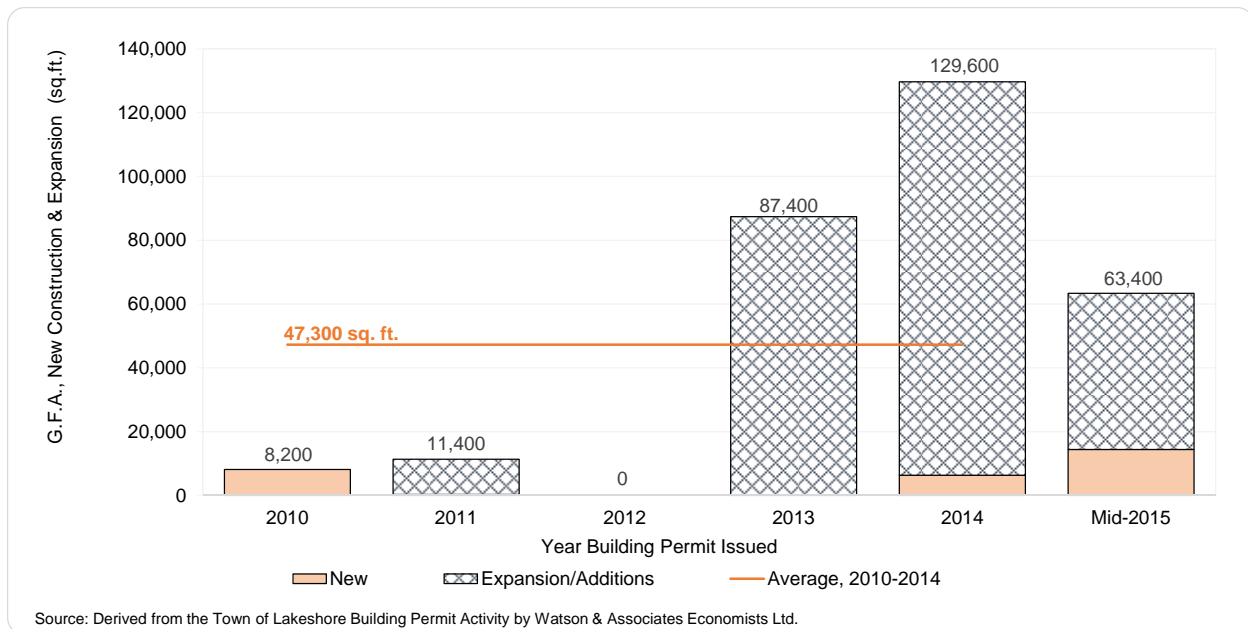


Figure 2-8 summarizes non-residential building construction in Lakeshore's Employment Areas during the 2010 to mid-2015 period, expressed in G.F.A. (sq.ft.). As shown, the Employment Areas have averaged 47,300 sq.ft. annually in non-residential building activity over the 2010 to 2014 period, which accounts for 47% of Town-wide non-residential activity. Construction activity in Employment Areas has been dominated by additions/expansions, accounting for 94% of building construction activity. Over the past five years, the amount of new construction activity on the Town's employment lands has been limited by the lack of "shovel-ready" employment lands,<sup>12</sup> which has limited market choice especially for larger industrial sites. The Town's employment land supply is discussed in Chapter 4.

Major expansions on the Town's employment lands over this period have included major autoparts manufacturers, TRQSS, Inc. (56,000 sq.ft. addition), Veltri Canada (86,000 sq.ft. addition) and Schukra of North America/Leggett & Platt Automotive Group (27,000 sq.ft. addition), as well as other manufacturers, including Erie Architectural Products (65,300 sq.ft. addition). All industrial expansions in Employment Areas since 2010 have occurred in the Patillo/Advance Industrial Area in the Maidstone Urban Area.

<sup>12</sup> "Shovel-ready" lands are defined as those that are serviced and zoned and available for development within the next 6 months.

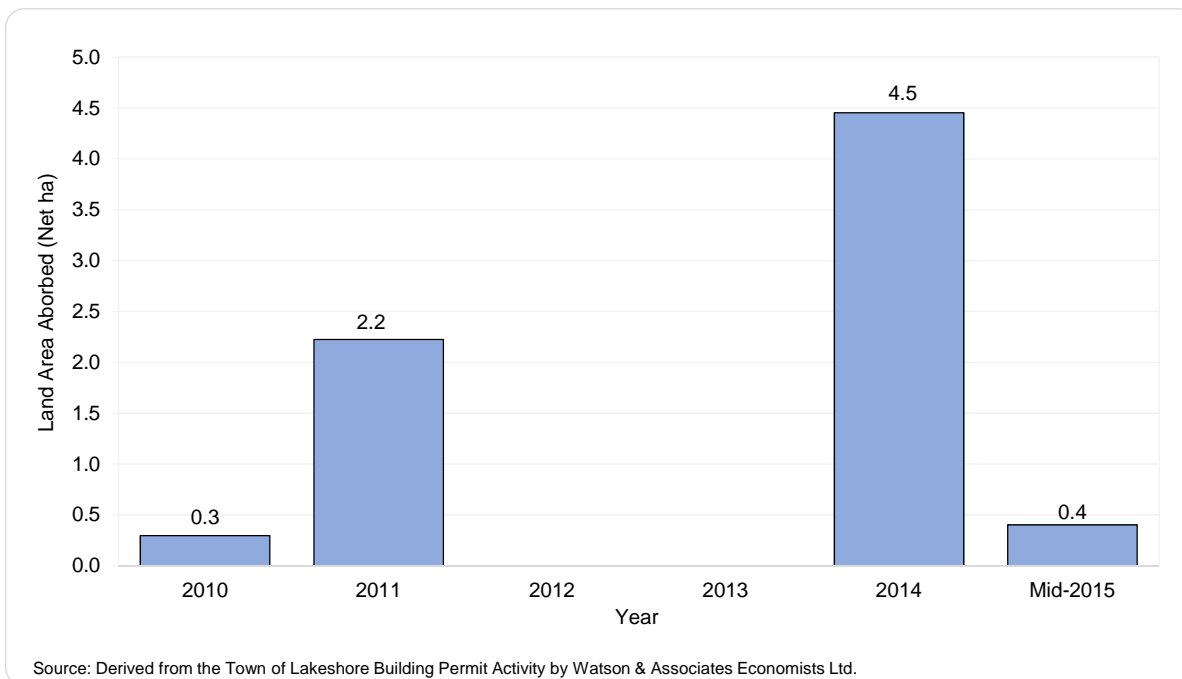
**Figure 2-8**  
**Town of Lakeshore**  
**Annual G.F.A. Development Activity (Sq.ft.)**  
**on Employment Lands, 2010 to 2014**



### ***2.3.4 Recent Employment Land Absorption Activity, 2010 to Mid-2015***

Due to the lack of new construction activity, the Town of Lakeshore has experienced minimal absorption over the 2010 to mid-2015 period within its Employment Areas. As previously discussed, the majority of construction activity on employment lands has primarily occurred in the form of expansions/additions. Figure 2-9 summarizes net land absorption (net hectares) over the 2010 to 2014 period. As illustrated, a total of 7 net ha (17 net acres) have been absorbed in the Town's Employment Areas, which represents an average of less than 2 ha (5 acres) per year. Employment land absorption has primarily occurred in the Patillo/Advance Industrial Area in the Maidstone Urban Area and in Comber.

**Figure 2-9**  
**Town of Lakeshore**  
**Industrial Land Absorption (Net ha), 2010 to Mid-2015**





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## 3. Long-term Population, Housing and Employment Growth Forecast

### 3.1 Long-term Town-wide Population and Housing Growth Forecast, 2015 to 2031

This chapter summarizes the long-term population, household and employment forecasts for the Town of Lakeshore from 2015 to 2031. As previously discussed, the long-term Town-wide growth forecast is consistent with the 2011 Essex County Foundation Report (Low Growth Scenario) growth allocation for the Town of Lakeshore.

Figure 3-1 summarizes the Town-wide population and housing forecast over the 2015 to 2031 period in comparison with recent historical trends between 2001 and 2015. Key findings regarding the Town-wide population and housing forecasts are summarized as follows:

- The Town's population as of mid-2015 is estimated at 36,200;
- The Town's population is forecast to increase by approximately 4,800 persons over the forecast period, from a population of 36,200 persons in 2015 to 41,000 in 2031. This represents an average annual growth rate of 0.8% between 2015 and 2031;
- The Town's housing base is forecast to increase to approximately 15,120 by 2031, an increase of approximately 2,180 units over the forecast period;
- Average housing occupancy levels or persons per unit (P.P.U.) have declined in the Town of Lakeshore from 2.90 in 2001 to 2.80 in 2011, largely driven by the aging of the population (i.e. "babyboomers"). Over the forecast period, average P.P.U. levels are anticipated to continue this decline to an average of 2.71 in 2031; and
- The majority of new housing growth is anticipated to be oriented towards low-density housing forms (i.e. single detached/semi-detached), comprising 85% of forecast housing growth over the 2015 to 2031 period; however, the percentage of medium-density and high-density housing forms is forecast to gradually increase over the forecast period largely driven by the aging of the babyboomer population.

**Figure 3-1**  
**Town of Lakeshore**  
**Summary of Forecast Population and Housing Growth, 2015 to 2031**

Year	Population (Excluding Census Undercount)	Housing Units				Person Per Unit (P.P.U.)
		Singles & Semi- Detached	Multiple Dwellings <sup>1</sup>	Apartments <sup>2</sup>	Total Households	
<i>Mid 2001</i>	28,700	9,510	180	210	9,900	2.90
<i>Mid 2006</i>	33,200	11,160	260	210	11,625	2.86
<i>Mid 2011</i>	35,000	11,830	340	180	12,340	2.84
<i>Mid 2015</i>	36,200	12,380	380	180	12,940	2.80
<i>Mid 2021</i>	38,500	13,270	470	230	13,970	2.76
<i>Mid 2026</i>	39,900	13,820	530	260	14,610	2.73
<i>Mid 2031</i>	41,000	14,230	590	300	15,120	2.71
<b>Mid 2001 - Mid 2006</b>	<b>4,500</b>	<b>1,650</b>	<b>80</b>	<b>0</b>	<b>1,725</b>	
<b>Mid 2006 - Mid 2011</b>	<b>1,800</b>	<b>670</b>	<b>80</b>	<b>-30</b>	<b>715</b>	
<b>Mid 2011 - Mid 2015</b>	<b>1,200</b>	<b>550</b>	<b>40</b>	<b>0</b>	<b>600</b>	
<b>Mid 2015 - Mid 2021</b>	<b>2,300</b>	<b>890</b>	<b>90</b>	<b>50</b>	<b>1,030</b>	
<b>Mid 2015 - Mid 2026</b>	<b>3,700</b>	<b>1,440</b>	<b>150</b>	<b>80</b>	<b>1,670</b>	
<b>Mid 2015 - Mid 2031</b>	<b>4,800</b>	<b>1,850</b>	<b>210</b>	<b>120</b>	<b>2,180</b>	

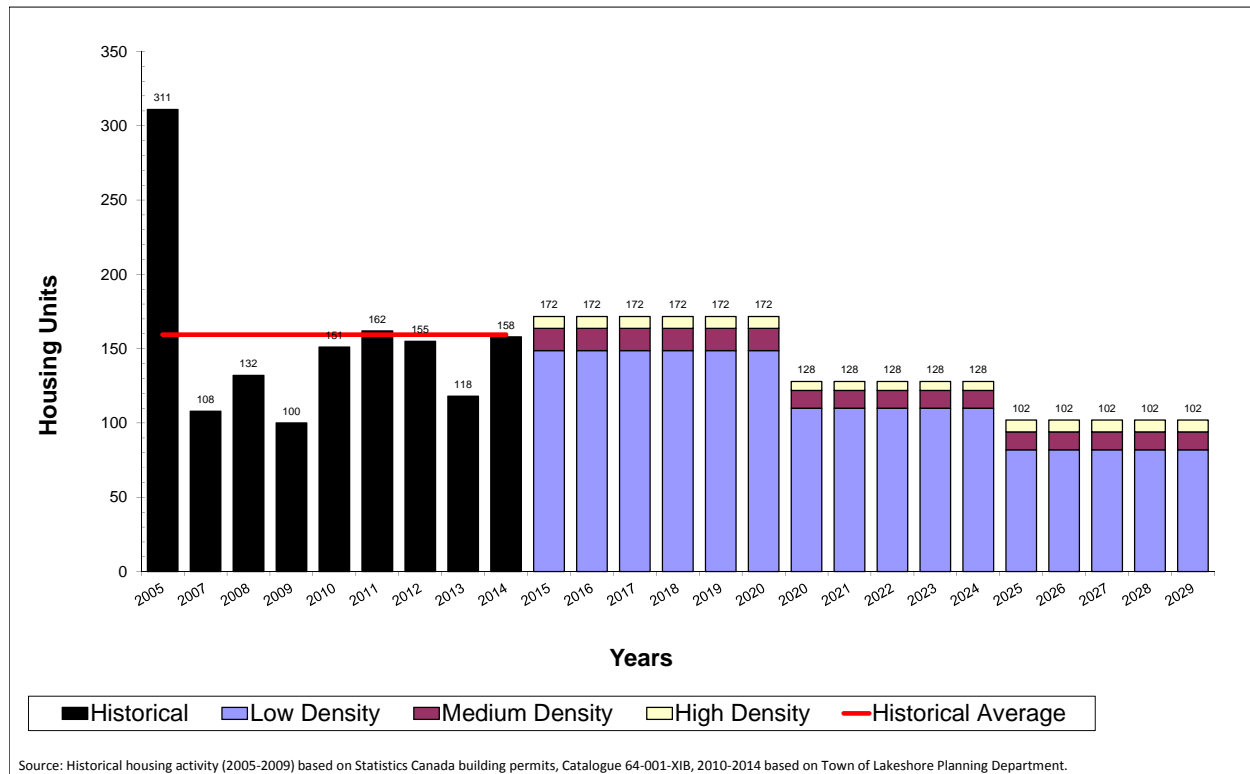
Source: Derived from Foundation Report, County of Essex Official Plan Review, August 2011, low growth scenario.

1. Includes townhomes and apartments in duplexes.

2. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure 3-2 provides a conceptual illustration of annual housing activity for the Town of Lakeshore in comparison to historical residential building permit activity between 2005 and 2014. Over the 2015 to 2031 forecast period, the Town is anticipated to average 121 housing units per year, which is below the average rate of residential building permit activity reported over the past 10 years (approximately 160 units per year).

**Figure 3-2  
Town of Lakeshore  
Historical and Forecast Annual Housing Growth,  
2005 to 2031**



### 3.2 Allocation of Population and Housing Growth Forecast by Key Growth Area, 2015 to 2031

Figures 3-3 and 3-4 summarize absolute and percentage population growth within the Town of Lakeshore by Key Growth Area, while Figures 3-5 and 3-6 summarize the forecast share of housing growth by Key Growth Area. In total, nine Key Growth Areas have been identified plus the remaining rural area. Map 3-1 illustrates the geographic location of the Town's Key Growth Areas. Additional details with respect to population and housing growth by Key Growth Area are provided in Appendix A. Key observations with respect to geographic location of population and housing growth over the 2015 to 2031 period include:

- The majority of the Town's existing population and households are located within the Maidstone Urban Area, with an estimated population and housing base of 22,500 and 7,510, respectively;
- Over the 2015 to 2031 forecast period, the Maidstone Urban Area will continue to represent the Town's primary urban growth area, with approximately 65% of the total population growth anticipated to occur within this area;

**Figure 3-3**  
**Town of Lakeshore**  
**Population Growth by Key Growth Area, 2015 to 2031**

Development Location	2015	2031	2015-2031
Maidstone	22,500	25,620	3,120
Shoreline Development	860	920	60
Comber	1,050	1,060	10
Belle River Strip	920	1,070	150
Lighthouse Cove	600	1,000	400
Stoney Point	1,420	2,080	660
North/South Woodslee	910	1,040	130
Hamlets	780	850	70
Fringe	260	350	90
Rural	6,880	6,990	110
<b>Town of Lakeshore</b>	<b>36,200</b>	<b>41,000</b>	<b>4,800</b>

Development Location	2015	2031	2015-2031
Maidstone	62%	62%	65%
Shoreline Development	2%	2%	1%
Comber	3%	3%	0%
Belle River Strip	3%	3%	3%
Lighthouse Cove	2%	2%	8%
Stoney Point	4%	5%	14%
North/South Woodslee	3%	3%	3%
Hamlets	2%	2%	1%
Fringe	1%	1%	2%
Rural	19%	17%	2%
<b>Town of Lakeshore</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Watson & Associates Economists Ltd. 2015.

Note: Numbers may not add precisely due to rounding.

**Figure 3-4**  
**Town of Lakeshore**  
**Housing Growth by Key Growth Area, 2015 to 2031**

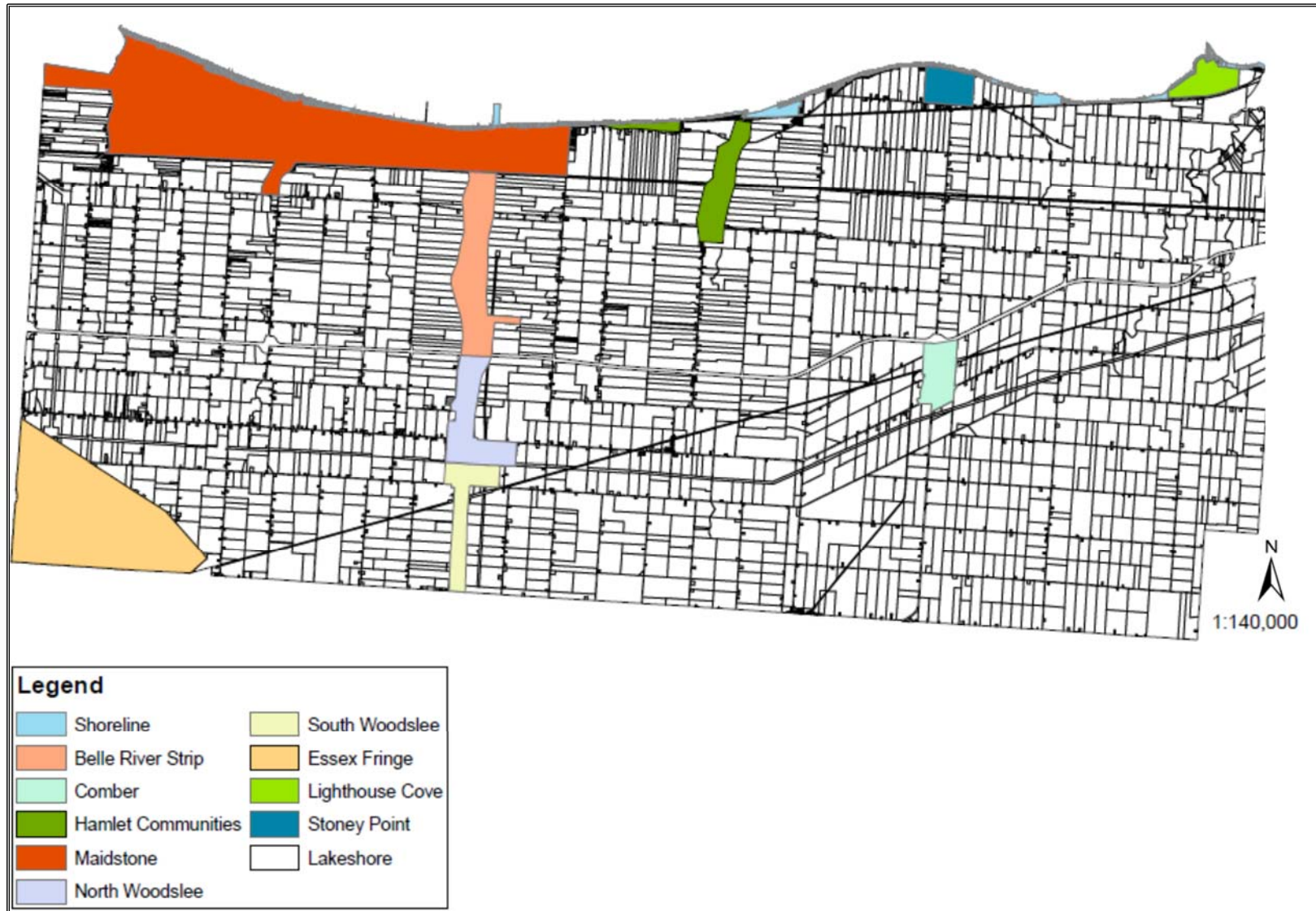
Development Location	2015	2031	2015-2031
Maidstone	7,510	8,950	1,440
Shoreline Development	350	380	30
Comber	400	420	20
Belle River Strip	330	400	70
Lighthouse Cove	280	410	130
Stoney Point	530	750	220
North/South Woodslee	330	380	50
Hamlets	340	370	30
Fringe	100	130	30
Rural	2,770	2,920	150
<b>Town of Lakeshore</b>	<b>12,940</b>	<b>15,110</b>	<b>2,170</b>

Development Location	2015	2031	2015-2031
Maidstone	58%	59%	66%
Shoreline Development	3%	3%	1%
Comber	3%	3%	1%
Belle River Strip	3%	3%	3%
Lighthouse Cove	2%	3%	6%
Stoney Point	4%	5%	10%
North/South Woodslee	3%	3%	2%
Hamlets	3%	2%	1%
Fringe	1%	1%	1%
Rural	21%	19%	7%
<b>Town of Lakeshore</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Watson & Associates Economists Ltd. 2015.

Note: Numbers may not add precisely due to rounding.

**Map 3-1  
Town of Lakeshore  
Key Growth Areas**



- The Town's rural areas collectively comprise approximately 19% of the Town's existing population base as of 2015. Between 2015 and 2031, the Town's share of rural population is forecast to gradually decline from 19% to 17%; and
- The remaining Key Growth Areas within the Town are forecast to collectively accommodate approximately 33% of Town-wide population growth for the Town, the majority of which has been allocated to Stoney Point and Lighthouse Cove.

The population and housing allocations by Key Growth Area were developed 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 process by housing structure type and approval status;
- Current inventory of net vacant designated urban greenfield lands not currently in the development approvals process;
- A high-level review of water and wastewater servicing capacity; and
- Provincial policy direction regarding forecast residential growth by urban versus rural area.

#### **Demand Factors:**

- Historical population and housing activity by structure type based on 2006 to 2011 Statistics Canada (Census) data by Key Growth Area and remaining rural area;
- A review of historical residential building permit activity (new units only) by structure type from 2011 to 2014 by Key Growth Area and remaining rural area;
- Consideration of market demand for housing intensification; and
- Appeal of Key Growth Areas to families and empty-nesters/seniors.

While population and employment growth rates vary significantly by geographic area, each of the Key Growth Areas share a number of relatively common attributes with respect to long-term residential development and demographic trends. These include:

- All Key Growth Areas are expected to experience housing growth over the long-term forecast period;
- Future housing growth will be dominated by low-density housing forms; however, increasing market opportunities will exist for medium-density and high-density housing in some areas as the local and County-wide population base continues to age; and

- P.P.U. levels are forecast to steadily decline from 2015 to 2031 in all Key Growth Areas. As a result, housing growth is expected to exceed population growth in some areas.

### 3.3 Long-term Employment Growth Forecast, 2011 to 2031

Figures 3-7a and 3-7b summarize the long-term employment forecast for the Town of Lakeshore by major employment sector from 2015 to 2031 in comparison to recent historical trends. The following key observations have been made with respect to the Town's long-term employment growth potential:

- Total employment is forecast to increase from 10,450 in 2015 to 15,180 in 2031 an increase of approximately 4,730 employees;
- The rate of Town-wide employment growth is forecast to decline over the forecast period. This decline in incremental employment growth over the longer term is anticipated to be driven by the aging of the regional population and labour force base; and
- During the forecast period, the Town's employment activity rate (i.e. ratio of jobs per population) is expected to increase from 29% in 2015 to 37% in 2031.

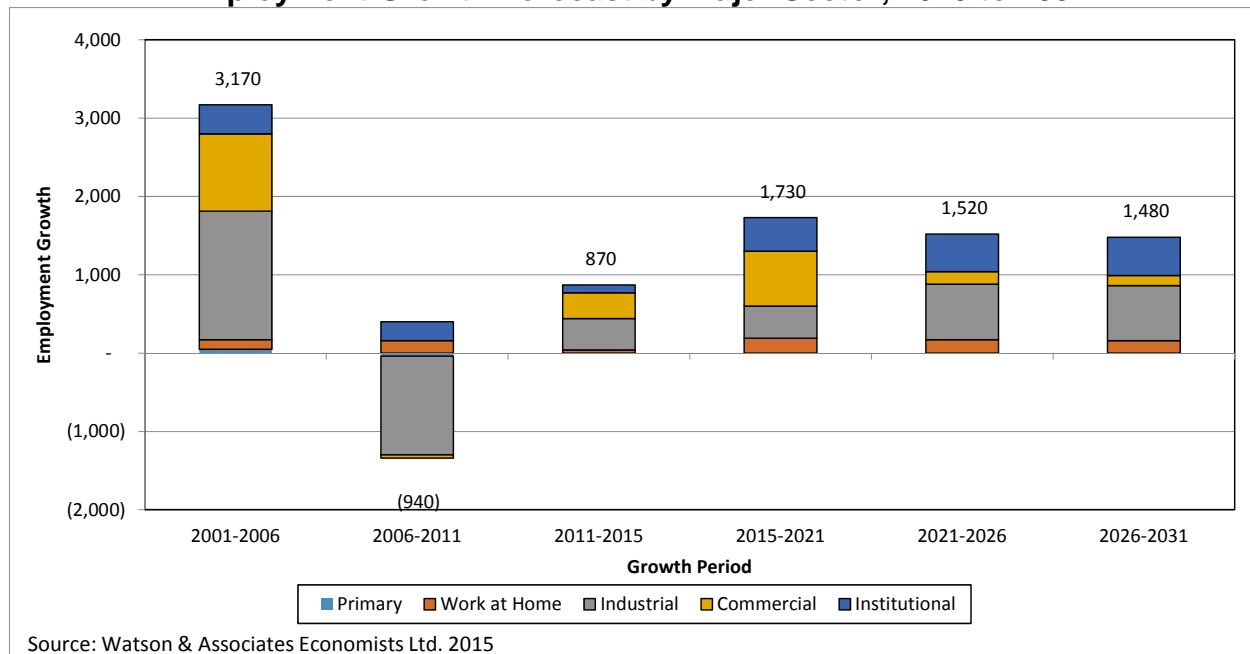
**Figure 3-7a**  
**Town of Lakeshore**  
**Employment Forecast by Major Sector, 2015 to 2031**

Year	Population	Total Activity Rate	Employment					Total
			Primary	Work at Home	Industrial	Commercial	Institutional	
2001	28250	0.260	90	1,040	4,120	1,520	580	<b>7,350</b>
2006	33250	0.316	140	1,160	5,760	2,510	950	<b>10,520</b>
2011	34,500	0.278	100	1,320	4,500	2,470	1,190	<b>9,580</b>
2015	36,200	0.289	100	1,360	4,900	2,800	1,290	<b>10,450</b>
2021	38,500	0.316	100	1,550	5,310	3,500	1,720	<b>12,180</b>
2026	39,900	0.343	100	1,720	6,020	3,660	2,200	<b>13,700</b>
2031	41,000	0.370	100	1,880	6,720	3,790	2,690	<b>15,180</b>

Source: Derived from Foundation Report Low Scenario, County of Essex Official Plan Review, August 2011, by Watson & Associates Economists Ltd.



**Figure 3-7b**  
**Town of Lakeshore**  
**Employment Growth Forecast by Major Sector, 2015 to 2031**



Over the forecast period, all employment sectors, with the exception of the primary sector, are anticipated to experience employment growth. Employment growth by major sector is discussed below.

### Primary Employment

- Primary industries (i.e. agriculture and other resource-based employment) comprise a relatively small proportion of Lakeshore's employment base (approximately 1% in 2015). This sector is not anticipated to experience employment growth over the 2015 to 2031 forecast period.

### Industrial Employment

- The regional and local industrial base, particularly the manufacturing sector, was hit relatively hard by the 2008/2009 global economic downturn.
- Between 2006 and 2011, the Town's industrial employment base contracted by approximately 1,260 jobs.
- Manufacturers in the auto-sector, including large (auto-parts manufacturers) and small-scale operators that service auto-sector manufacturers (e.g. tool and die operators) have a strong presence in the Town's Employment Areas. These operations are concentrated in the Patillo/Advance Industrial Area and County Road 22 Corridor Employment Areas in the Maidstone Urban Area and represent

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a large portion of the Town's industrial base totalling over 2,200 jobs in the Town of Lakeshore.

- While there has been some contraction over the 2006 to 2011 period in the Town's industrial base employment, recent industrial G.F.A. activity since 2010 is suggesting that the existing industrial business base is investing in the local market through facility expansions.
- The regional export-based economy within Essex County and the Town of Lakeshore is gradually recovering. With this recovery, Lakeshore's industrial sector is showing signs of a gradual rebound and is forecast to experience moderate industrial growth over the long term, provided that an adequate supply of serviced employment lands is provided within the Town's industrial areas.
- By 2031, the Town's industrial employment base is forecast to reach approximately 6,720 employees, which represents an increase of 1,820 industrial employees between 2015 and 2031.<sup>13</sup>
- Industrial employment growth is anticipated in sectors related to small/medium-scale manufacturing (primarily firms which are technology intensive), construction, energy and environmental technology, wholesale trade and transportation and warehousing.

### **Commercial Employment**

- The Town's retail base is primarily oriented towards the local population and to a lesser extent the seasonal (summer) visitors to the area. The retail base of the area includes a mix of small to medium-scale retailers (less than 50,000 sq.ft.). The Manning Road/Highway 22 and St. Clair Beach area includes some of the larger stores (20,000 to 50,000 sq.ft.) in the Town, while smaller retailers are located in the Town's nodes (e.g. Belle River), waterfront areas and hamlets. Regional shopping centres and big box retailers (greater than 50,000 sq.ft.) are primarily found in the adjacent municipalities of the Town of Tecumseh and the City of Windsor. Retail employment in the Town is expected to increase modestly over the forecast period as a result of small and medium-scale retail developments. The City of Windsor and the Town of Tecumseh are expected to continue to be major draws in the area.
- Commercial employment (i.e. retail and office development) represents a key component of employment growth in the Town of Lakeshore.

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<sup>13</sup> It is noted that when considering industrial employment growth from 2006 to 2031, the Town's industrial base is forecast to increase moderately by approximately 960 employees.

- Over the forecast period, commercial employment within the Town is anticipated to increase by 990 jobs, comprising approximately 21% of total employment growth. A large portion of this employment growth will be directly related to population-related employment sectors, including retail and accommodation/food services.
- The Town is also expected to see a steady employment increase in the business service sector (i.e. real estate, finance, insurance and professional/scientific services).

### **Institutional Employment**

- The Town of Lakeshore's employment base is anticipated to steadily increase in the institutional sector, largely driven by the need for increased health services, education and other institutional facilities (i.e. cultural, religious, schools) associated with population growth. Institutional employment growth is forecast to increase by approximately 1,400 over the 2015 to 2031 period, accounting for 30% of total employment growth.
- Lakeshore is a growing centre for health services serving the local and regional population. The health sector is anticipated to experience expansion driven by the aging population. More specifically, the Town is expected to see an increase in seniors' health facilities/services, including retirement homes and assisted living facilities.

### **Work-at-Home Employment**

- Work-at-home employment in the Town of Lakeshore is expected to steadily increase between 2015 and 2031, driven by forecast growth in the knowledge-based and creative economy. Future opportunities for work-at-home employment are anticipated to be facilitated by continued advancements in information and telecommunications technology.

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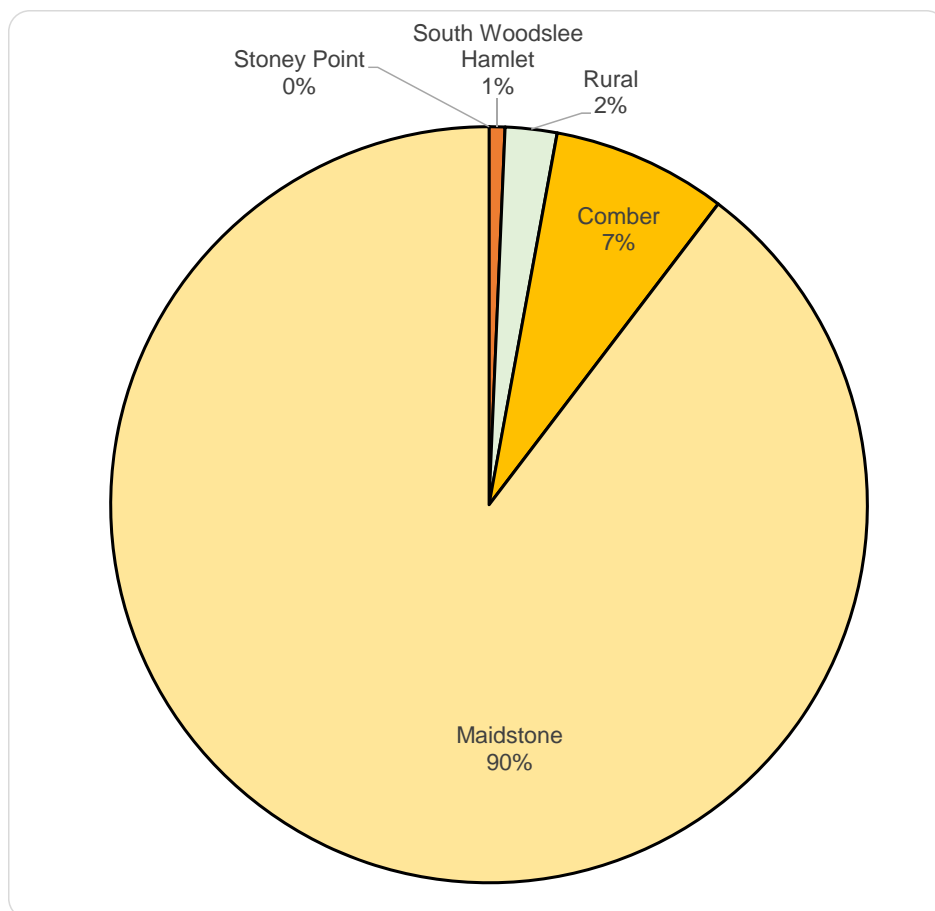
## 4. Town of Lakeshore Employment Land Supply

This chapter provides a summary of gross and net vacant designated industrial land supply by Employment Area within the Town of Lakeshore. To generate the vacant employment land inventory, Watson & Associates, with input and data from Town staff, has reviewed all parcels designated as “Employment Areas” within the Town’s O.P. The analysis was completed primarily through a desktop review using geographic information systems (G.I.S.) mapping software. Spatial overlays utilized to develop the net land supply included parcel fabric and land-use layers.

### 4.1 Developed Employment Lands

Generally, the Employment Areas within the Maidstone Urban Area and, to a lesser extent the Comber Urban Area, offer physical and locational attributes desired by target industry sectors (i.e. access/proximity to major transportation infrastructure, proximity to suppliers and/or customer base, access to skilled and unskilled labour, potential opportunities for storage and expansion). The majority of the Town’s developed employment lands are located in the Maidstone Urban Area within the Patillo/Advance Industrial Area and the County Road 22 Industrial Corridor. Collectively, these two industrial areas represents 90% of the developed employment lands in the Town of Lakeshore, as illustrated in Figure 4-1. It is anticipated that the Maidstone Urban Area will continue to be a focal point for employment land development in the Town of Lakeshore given its strong physical attributes (i.e. access to County Road 22, proximity to Highway 401, proximity to the City of Windsor and the Canada-U.S. border) and long-term development potential of its vacant land supply.

**Figure 4-1**  
**Town of Lakeshore**  
**Developed Employment Lands by Geographic Location**

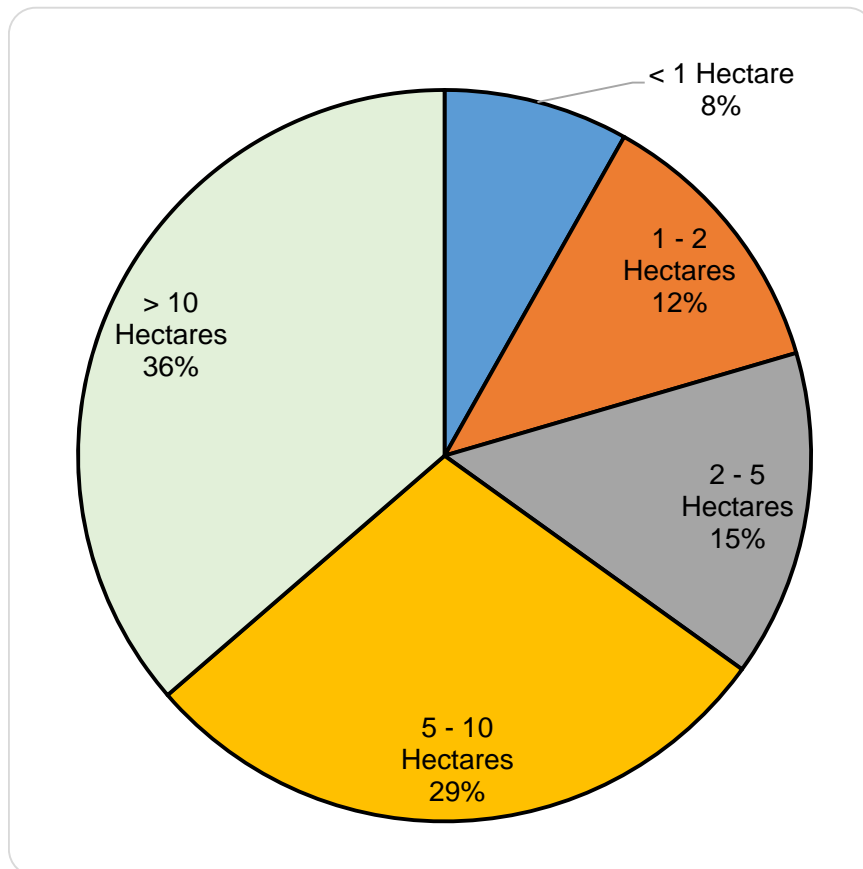


Source: Watson & Associates Economists Ltd.

Large-sized developed land parcels (greater than 5 hectares) in the Town of Lakeshore account for 65% of the developed employment land area, as illustrated in Figure 4-2. There are, however, only eight developed parcels greater than 5 hectares, concentrated along the Highway 22 corridor in the Maidstone Urban Area and near Highway 401 in Comber.

In terms of the number of parcels by size range, 67% of the land parcels in the Employment Areas are 2 hectares or smaller. These smaller parcels account for 20% of the developed land area in the Town of Lakeshore and are generally located in the Patillo/Advance Industrial Area in the Maidstone Urban Area.

**Figure 4-2**  
**Town of Lakeshore**  
**Developed Employment Land Area**  
**by Parcel Size Range (Net ha)**



Source: Watson & Associates Economists Ltd.

## 4.2 Vacant Employment Land Analysis

A major factor in the future competitiveness of Lakeshore's economic base is the supply and quality of its vacant employment lands. As summarized in Figures 4-3 and 4-4, the Town of Lakeshore has 330 gross ha (815 net acres) of vacant land designated as "Employment Area." Adjusted for local infrastructure (i.e. roads, stormwater management, etc.) and long-term land vacancy, the Town's net developable designated employment land supply is estimated at 198 net ha (489 net acres).

Long-term land vacancy (i.e. vacant industrial parcels) is a common characteristic which is experienced in mature industrial areas throughout Ontario, including the Town of Lakeshore. Typically, as industrial/business park lands are brought to market, the more marketable and developable industrial sites absorb first. Often the remaining less-marketable sites are fragmented throughout the industrial area, which limits their potential for larger scale development. Invariably, many of these sites remain vacant

**Figure 4-3**  
**Town of Lakeshore**  
**Gross vs. Net Supply of Employment Lands**

Key Development Area	Total Developed (Net Ha) <sup>2</sup>	Vacant Employment Land Supply (Gross Hectares)					Net Developable Land (ha)	
		Serviced <sup>3,4</sup>	Serviceable (Medium Term)	Constrained (Long Term)	Wallace Woods Secondary Plan Area <sup>5</sup>	Total Vacant Land Supply (Gross ha)	Net Developable Land (ha) <sup>6</sup>	Net Developable Land Adjusted for Long-Term Vacancy(ha) <sup>7</sup>
Maidstone <sup>1</sup>	213.7	20.9	0	83.5	30.7	135.0	108.0	81.0
Comber	17.8	0	20.8	82.0	0.0	102.8	82.2	61.7
Stoney Point	0.0	0	0.0	91.3	0.0	91.3	73.1	54.8
South Woodslee Hamlet	1.6	0	0	1.1	0.0	1.1	0.9	0.7
<b>Total</b>	<b>233.1</b>	<b>20.9</b>	<b>20.8</b>	<b>257.9</b>	<b>30.7</b>	<b>330.3</b>	<b>264.2</b>	<b>198.2</b>

Source: Based on discussions and G.I.S. land supply data provided from the Town of Lakeshore staff by Watson & Associates Economists Ltd.

<sup>1</sup> Excludes future potential development on the Designated Urban Reserve Lands which is approximately 243.2 gross hectares (601 acres).

<sup>2</sup> Includes lands that have been identified as underutilized. The Town has identified 16 hectares as underutilized in the Maidstone area.

<sup>3</sup> Excludes underutilized lands. The Town has identified 16 hectares as underutilized in the Maidstone area.

<sup>4</sup> The Town has identified that the lands south of Jutras Drive and west of Patillo Road, covering a land area of 41 hectares, has a limited amount of servicing still available, however, the servicing would not cover the majority of the area.

<sup>5</sup> Based on the land identified as Employment District in the Wallace Woods Secondary Plan, September 26, 2011. The total land area of the Wallace Woods Secondary Plan Area is 469 hectares which includes employment, residential, commercial and mixed uses.

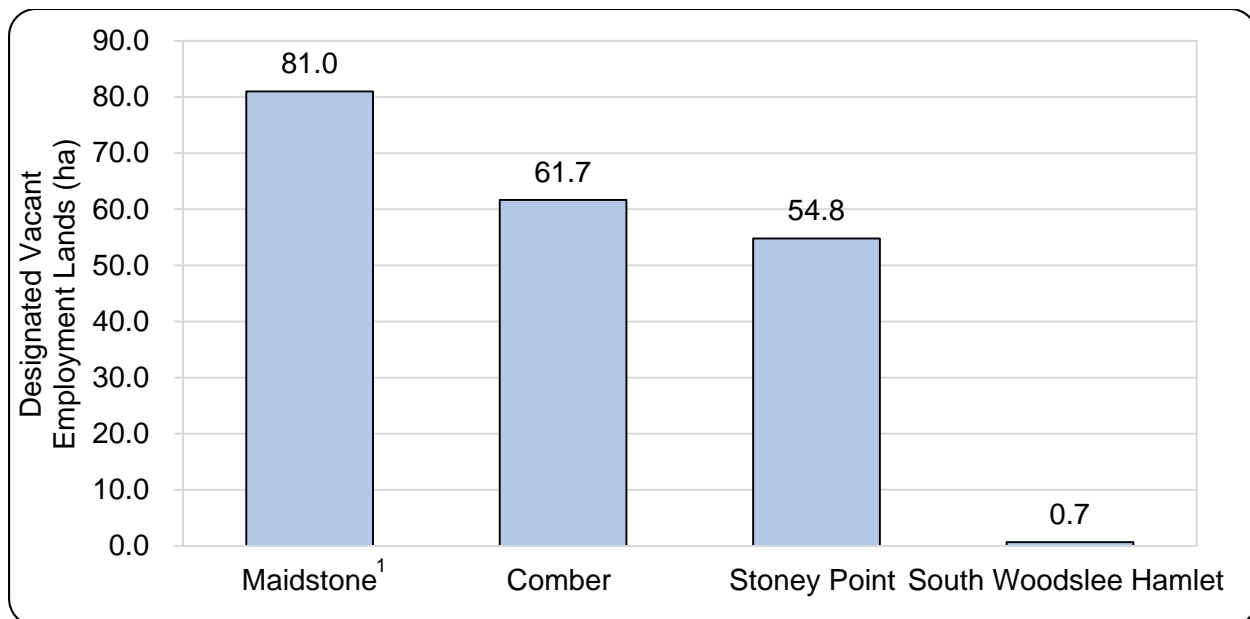
<sup>6</sup> A downward adjustment of 20% of the gross area has been applied to account for internal infrastructure.

<sup>7</sup> Long-term industrial land vacancy adjustment - 25% of net developed and net vacant industrial lands. Accounts for industrial land sites which may not develop over the long term (i.e. 2031) due to odd/small lot size and poor configuration, underutilized employment sites, and sites inactive/land banking.

over the longer term, due to their limited market choice to end users. Accordingly, additional reductions to the net developable vacant industrial land supply have been made to account for long-term land vacancy, as summarized in Figure 4-3. This adjustment accounts for sites or portions of sites which are unlikely to develop over the long term due to odd/small lot sizes and poor configuration, unfavourable site conditions, underutilized industrial sites and site inactivity/land banking, which may tie up potentially vacant and developable lands. For the purpose of this analysis, an estimate of approximately 25% long-term land vacancy has been used.

The largest share of vacant designated employment lands is located within the Maidstone Urban Area, at 81 net ha (200 gross acres) which includes the Patillo/ Advance Industrial Area, the County Road 22 Industrial Corridor and the Lakeshore West/Manning Road Industrial Area. The Town also has a vacant designated employment land supply of 62 net ha (153 net acres) within Comber and 55 net ha (136 net acres) within Stoney Point as of mid-2015. Also, a minimal supply of approximately 1 net ha (2.5 net acres) has been identified within the South Woodslee Hamlet.

**Figure 4-4**  
**Town of Lakeshore**  
**Net Supply of Employment Lands by Urban Area**



Source: Based on discussions and G.I.S. land supply data provided from the Town of Lakeshore staff by Watson & Associates Economists Ltd.

<sup>1</sup> Includes Wallace Woods Secondary Plan Area. Excludes potential from Urban Reserve Lands and underutilized lands.

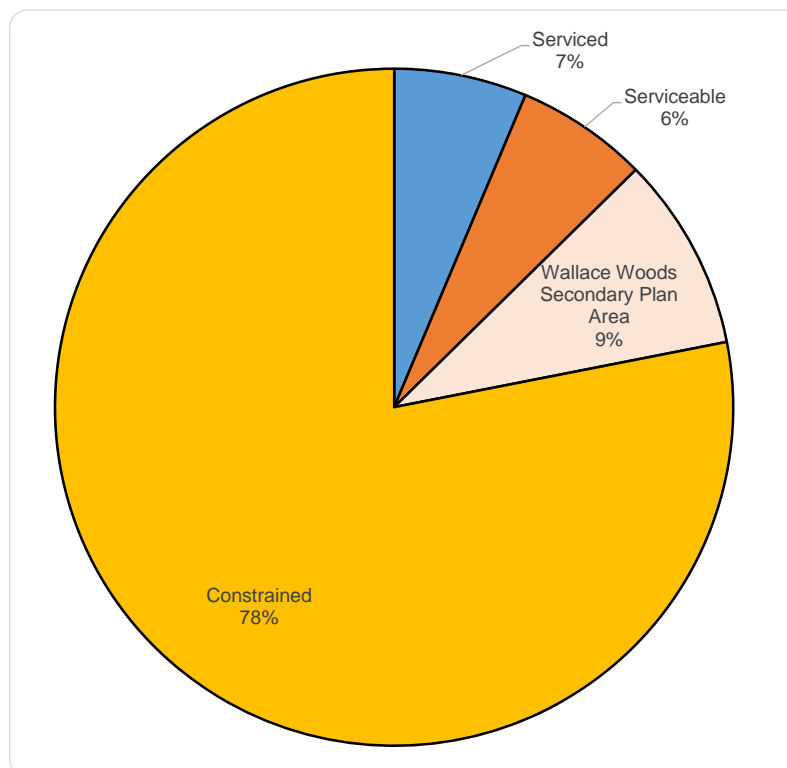


### 4.3 Supply of Serviced and/or Serviceable Vacant Employment Lands

Of the Town's total designated vacant employment land supply, only 21 ha (52 acres) or 6% of the gross vacant designated land supply is municipally serviced or shovel-ready for development. These lands generally represent small infill lots (less than 2 hectares) that would complete the northern section (north of Jutras Drive South) of the Patillo/ Advance Industrial Area.

An additional 21 ha (52 acres) of employment lands within the Comber Urban Area are identified as serviceable. In addition, an area of 31 ha (77 acres) is currently designated as employment lands within the Wallace Woods Secondary Plan. The majority of the Town's remaining employment lands are currently constrained with respect to water and wastewater services, representing 78% of the vacant employment land supply, as illustrated in Figure 4-5.

**Figure 4-5  
Town of Lakeshore  
Designated Vacant Land Supply by Type**



Source: Based on discussions and G.I.S. land supply data provided from the Town of Lakeshore staff by Watson & Associates Economists Ltd.

Notes: Serviced includes land that are shovel-ready for development. Serviceable includes lands that could receive servicing within 10 years. Constrained includes lands that have servicing constraints and servicing these lands is beyond a 10-year period. Wallace Woods includes lands that are identified in the secondary plan as employment district.

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## 4.4 Market Choice Requirements

From a market choice perspective, one of the most important employment site selection criterion, which is partially controllable by the Town of Lakeshore, relates to ensuring that an ample supply of suitable vacant serviced (and serviceable) employment lands is available for purchase and absorption. This involves providing a readily available and serviced employment land supply inventory, to fully provide for a range of site selection choices with respect to:

- price;
- site size;
- availability and cost of servicing;
- neighbourhood and setting;
- zoning;
- visibility;
- highway access;
- other physical characteristics (topography, environmental conditions/soil conditions, buffering);
- tenure (lease vs. design build vs. own); and
- other industrial land market requirements, including site proportioning (frontage to depth), timing of servicing, site expandability, etc.

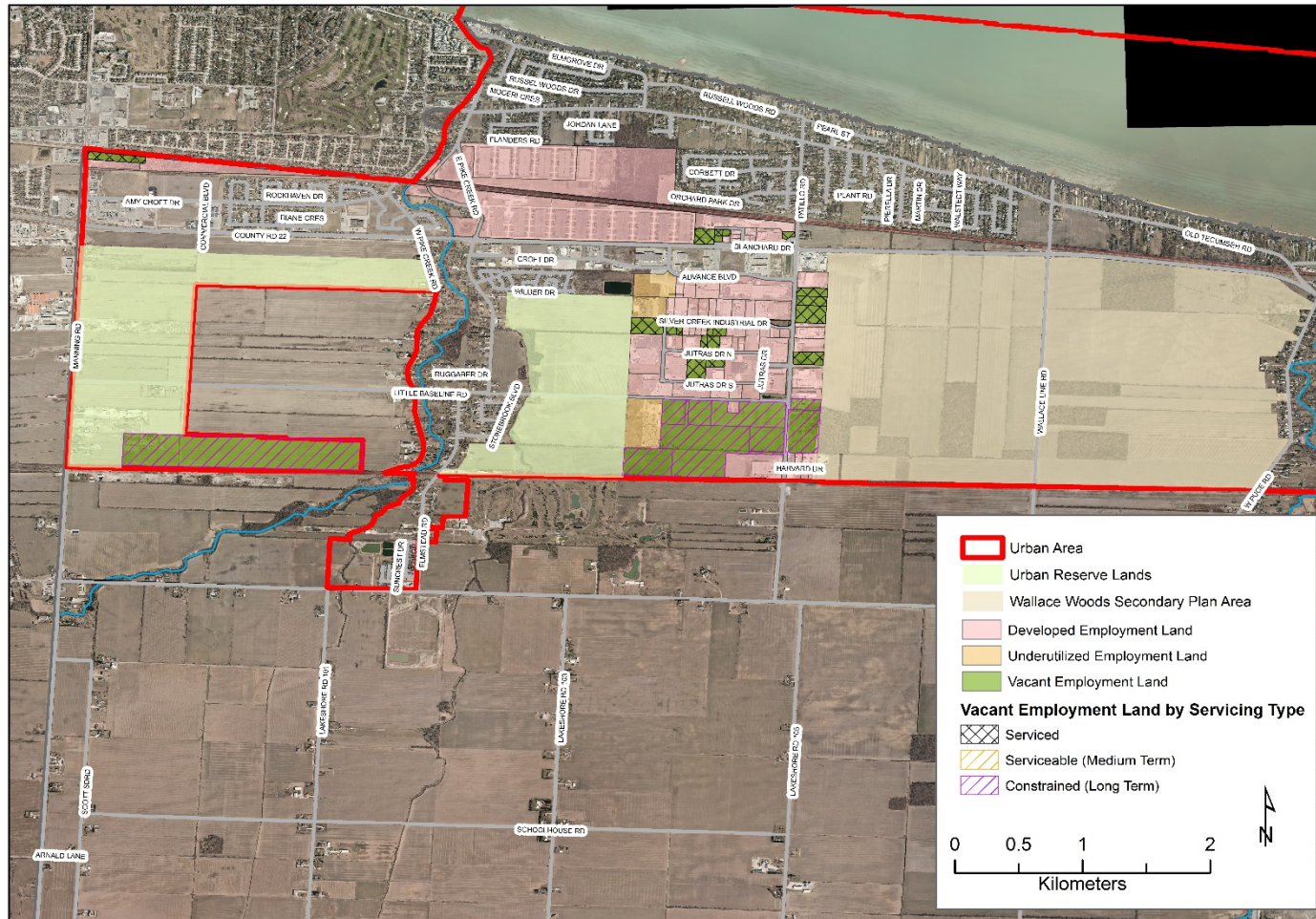
To ensure that the market for employment lands is not unduly constrained, the Town of Lakeshore needs to provide a balanced inventory of shovel-ready and designated developable vacant employment lands that is sufficient to meet demand in the short to medium term. It is noted that if the development constraints identified on larger-scale industrial sites are not addressed, forecast industrial absorption will continue to be limited, similar to recent industrial development trends.

## 4.5 Geographic Location of Developed and Vacant Employment Land Supply

Figures 4-6 through 4-9 geographically illustrate the location of the Town's developed and vacant employment land supply by industrial area. For each industrial area, the supply of vacant employment lands has been summarized by availability (i.e. serviced, serviceable and constrained). As identified, a large portion of recent industrial/commercial development activity on employment lands in the Town of Lakeshore has occurred on occupied/development lands. This suggests that further opportunities may exist for intensification on employment lands in the Town of Lakeshore. Larger-scale

industrial development opportunities are available in Maidstone, Comber and Stoney Point; however, as previously discussed, the majority of these lands currently have water/wastewater servicing constraints.

**Figure 4-6  
Town of Lakeshore  
Maidstone Urban Employment Land Inventory**



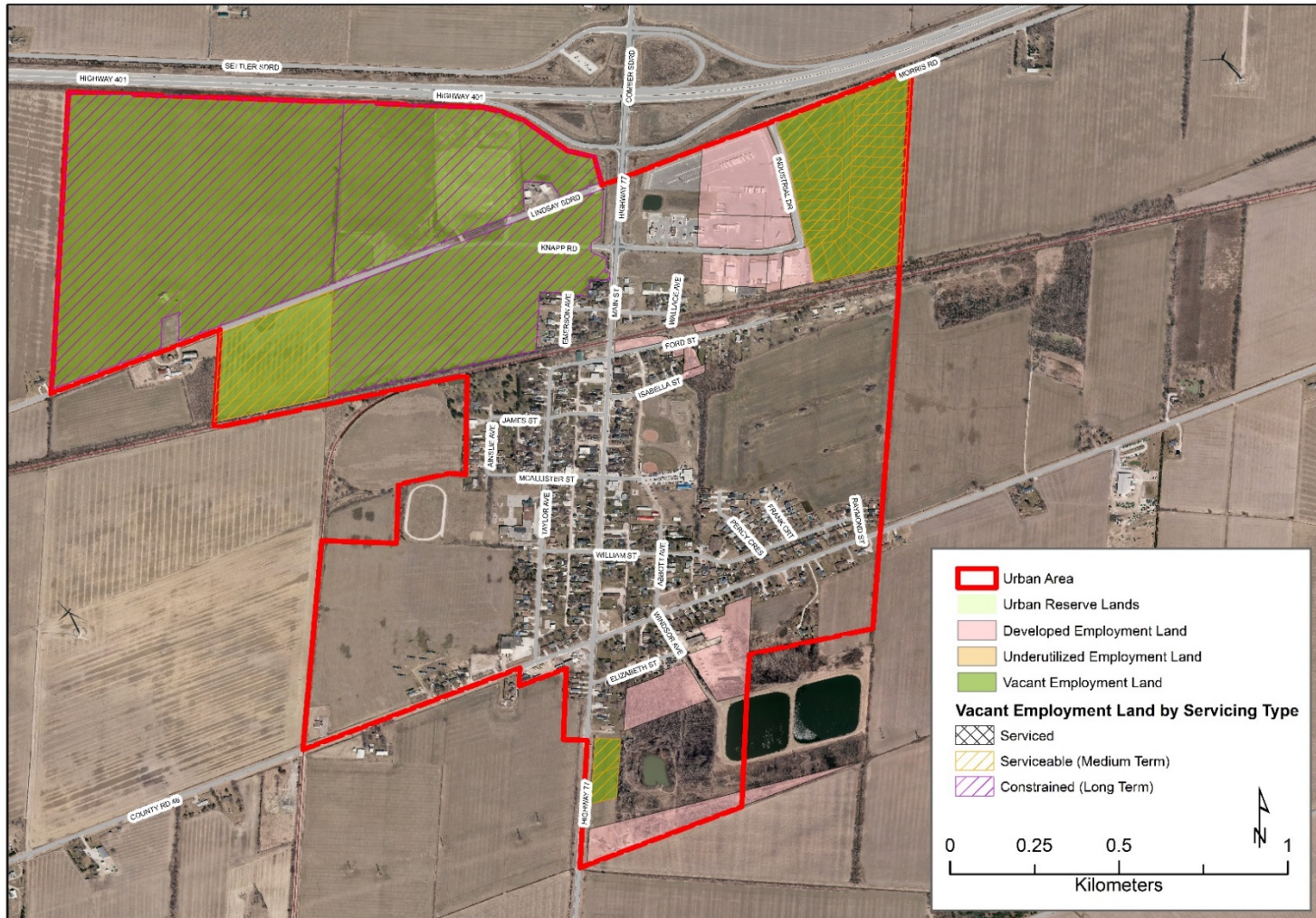


**Figure 4-7**  
**Town of Lakeshore**  
**Stoney Point Urban Employment Land Inventory**





**Figure 4-8  
Town of Lakeshore  
Comber Urban Employment Land Inventory**





**Figure 4-9**  
**Town of Lakeshore**  
**South Woodslee Hamlet Employment Land Inventory**



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## 5. Town of Lakeshore Employment Land Needs, 2015 to 2031

### 5.1 Employment Land Demand, 2015 to 2031

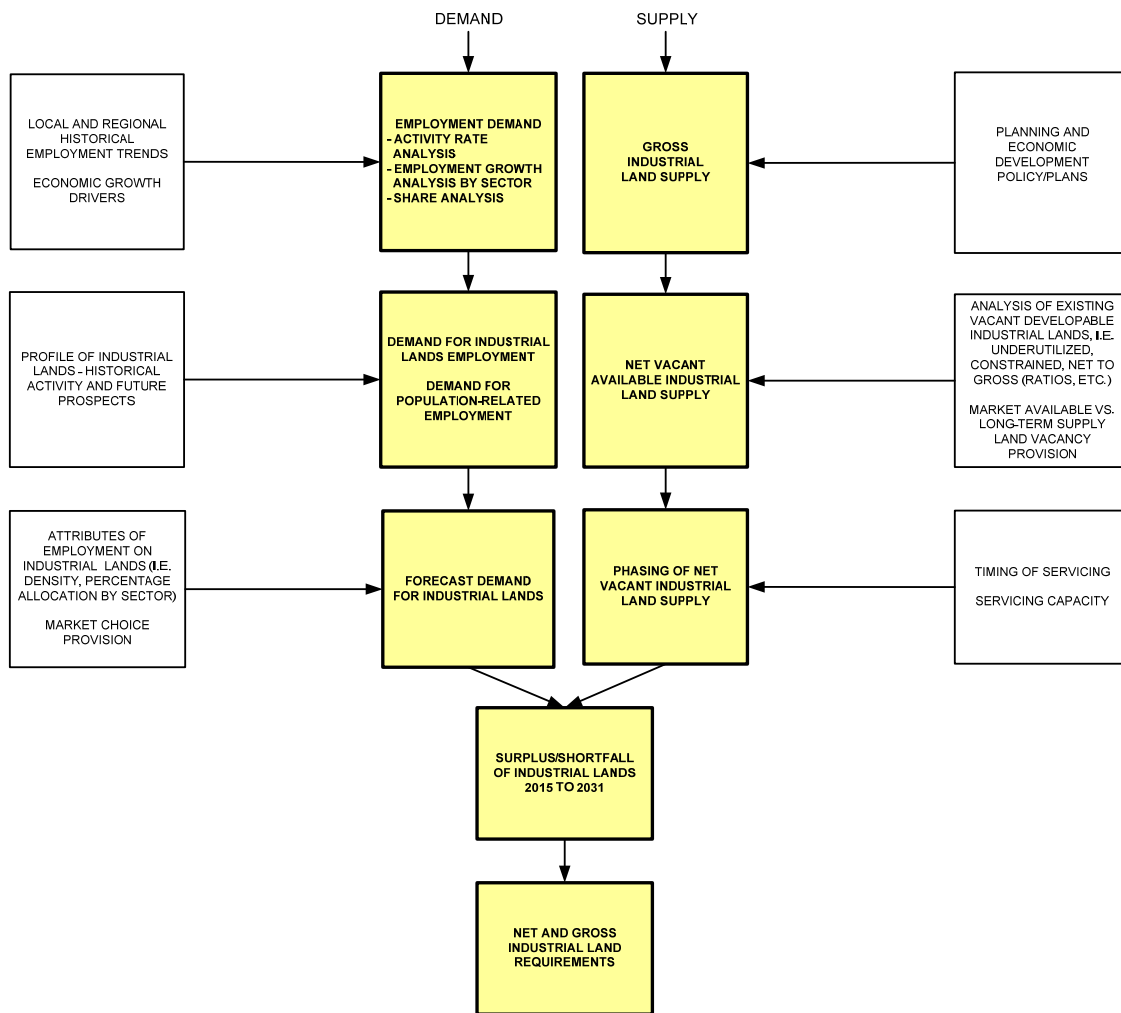
Building on the long-term employment forecast presented in Chapter 3, and the review of designated employment land supply in Chapter 4, an assessment of anticipated employment land need requirements has been identified herein, based on the following additional considerations:

- Estimating the share of employment growth on employment lands by I.C.I. (industrial, commercial, institutional);
- Existing and forecast density assumptions (i.e. employees/net hectare or acre) for employment lands;
- Historical and forecast employment lands employment absorption by employment type (i.e. general vs. prestige) and sector (i.e. manufacturing, warehousing and distribution, office commercial, etc.);
- The amount of marketable designated net vacant employment land supply by Employment Area over the long term; and
- Anticipated opportunities for future intensification within the Town's designated Employment Areas.

Figure 5-1 graphically illustrates this approach.



**Figure 5-1  
Town of Lakeshore  
Schematic Approach to Forecasting Long-term Need for Employment Lands**



In generating employment land area requirements for the Town of Lakeshore, the following steps have been undertaken:

### Employment on Employment Lands

#### 1. Remove Work-at-Home Employment

As identified in Chapter 3, forecast employment growth has been categorized into four broad categories, including primary, industrial, commercial and institutional, based on 2006 Census data. These categories have been aggregated from specific employment sub-classifications based on the North American Industrial Classification (N.A.I.C.)

system.<sup>14</sup> As a first step, all estimated “work-at-home” employees have been excluded from the employment land needs analysis, as these employees do not require land in the Town’s designated Employment Areas.

2. Determine the Amount of Industrial, Commercial and Institutional (I.C.I.) Employees on Employment Lands

As previously identified, current definitions of employment lands have broadened to include a number of commercial uses (and to a lesser extent institutional uses) in addition to traditional industrial development. For example, a number of commercial and institutional uses (as defined by Statistics Canada) are permitted on lands designated/zoned employment lands.

A breakdown of employment by major sector (I.C.I.) on employment lands for the Town of Lakeshore was estimated using 2015 EMSI data and recent development activity. Figure 5-2 presents the percentage of employment by major sector (I.C.I.) on employment lands used for the forecast period (2015 to 2031).

**Figure 5-2**  
**Town of Lakeshore**  
**Proportion of 2015 to 2031 Employment Growth**  
**on Urban Employment Lands by I.C.I.**

Employment Sector	Percentage of Total Town Employment on Urban Employment Lands
Industrial	97%
Commercial	36%
Institutional	1%

Source: Watson & Associates Economists Ltd., 2015

Note: Assumes approximately 3% of industrial employment growth in the Town’s rural area.

Figure 5-3 summarizes forecast employment on employment lands over the short-, medium- and long-term forecast periods, based on the assumed allocation of growth on employment lands assigned by I.C.I., as set out in Figure 5-2. Over the 2015 to 2031 period, Lakeshore’s employment lands are anticipated to accommodate 42% of the Town’s total employment growth, totalling approximately 1,990 employees.

<sup>14</sup> Employment by N.A.I.C. has been converted to Standard Industrial Classification (S.I.C.) to be consistent with historical employment data (i.e. 1991 and 1996).

**Figure 5-3**  
**Town of Lakeshore**  
**Employment Growth on Urban Employment Lands, 2015 to 2031**

Employment by ICI	Employment Growth by Sector			Employment Growth on Employment Lands				Percent on Employment Lands (2031)
	2015-2021	2015-2026	2015-2031	2011-2015	2015-2021	2015-2026	2015-2031	
Primary	0	0	0	0	0	0	0	0%
Work @ Home	193	360	521	0	0	0	0	0%
Industrial	408	1,122	1,823	388	396	1,088	1,769	97%
Commercial	703	858	987	70	146	178	205	21%
Institutional	423	906	1,399	1	5	11	17	1%
<b>Total</b>	<b>1,727</b>	<b>3,246</b>	<b>4,731</b>	<b>459</b>	<b>547</b>	<b>1,277</b>	<b>1,991</b>	<b>42%</b>

Source: Watson & Associates Economists Ltd., 2015. Numbers may not add precisely due to rounding.

### Forecast Employment Density on Employment Lands

Existing employment density on employment lands in Lakeshore was based on a review of a sample of recently developed employment land parcels in the Town of Lakeshore. Based on this review, recent employment density levels on employment lands in Lakeshore averaged 29 jobs per net ha (12 jobs per net acre). Based on regional trends in southwestern Ontario, the average density levels on employment lands are declining and will continue to do so over the long-term forecast period. Structural changes in the economy are also changing the character of economic activities on employment lands and impacting employment density. Recent trends include:

- Increasing demand for warehousing/logistics and transportation uses for the growing “goods movement” sectors which tend to be of lower employment density; and
- Increased automation in the manufacturing sector as domestic manufacturers focus their efforts on increased efficiency and competitiveness through automation.

Given these factors, it is foreseeable that future densities on employment lands in the Town of Lakeshore will be slightly lower on average than existing densities achieved on the Town’s employment lands. Based on our review of recent development activity on employment lands and anticipated market trends, an average employment density of 27 jobs per net ha (11 jobs per net acre) has been assumed over the 2015 to 2031 forecast period.

The forecast employment land density identified herein has been used in generating future land demand on employment lands. It is noted that future density levels achieved on employment lands could differ depending on future trends in the industrial and

commercial office sector. Accordingly, it is recommended that the Town continue to monitor future density trends on employment lands as part of its O.P. review process.

## 5.2 Employment Land Demand within the Town of Lakeshore, 2015 to 2031

Figure 5-4 summarizes forecast demand for employment lands from 2015 to 2031 in five-year increments. Figure 5-5 illustrates forecast annual absorption for the Town of Lakeshore over the 2015 to 2031 period in comparison to historical trends. Key observations include:

- Over the planning horizon, an estimated 10% of the total employment growth forecast on employment lands is expected to be accommodated through intensification. It is anticipated that the majority of this intensification will be accommodated through infill, redevelopment and expansion of existing developed employment lands in the Maidstone Urban Area;
- Lakeshore is forecast to absorb an annual average of approximately 4 net ha per year (10 net acres per year) from 2015 to 2031; and
- Over the 2015 to 2031 planning horizon, employment land demand is forecast to total 67 net ha (165 net acres).<sup>15</sup>

**Figure 5-4**  
**Town of Lakeshore**  
**Forecast Urban Employment Land Demand, 2015 to 2031**

Growth Period	Total Employment on Urban Employment Lands	Intensification on Urban Employment Lands <sup>1</sup>	Total Employment on Employment Lands Adjusted for Intensification	Employment Density (jobs per net ha)	Total Urban Land Demand (ha)	Annual Urban Employment Land Absorption (ha)
2011 - 2015	459	46	413	27	15	3.8
2015 - 2021	547	55	492	27	18	3.0
2015 - 2026	1,277	128	1,149	27	43	3.9
2015 - 2031	1,991	199	1,792	27	67	4.2

1. Assumes 10% of employment will be accommodated through intensification.

<sup>15</sup> Total employment land demand based on 4.2 net ha per year X 16 years = 67 net ha (10.3 net acres per year X 16 years = 165 net acres).

Figure 5-5 provides a conceptual illustration of forecast annual industrial absorption over the 2015 to 2031 period relative to historical absorption activity on employment lands between 2010 and 2014.

**Figure 5-5  
Town of Lakeshore  
Annual Urban Employment Land Needs Forecast, 2015 to 2031**

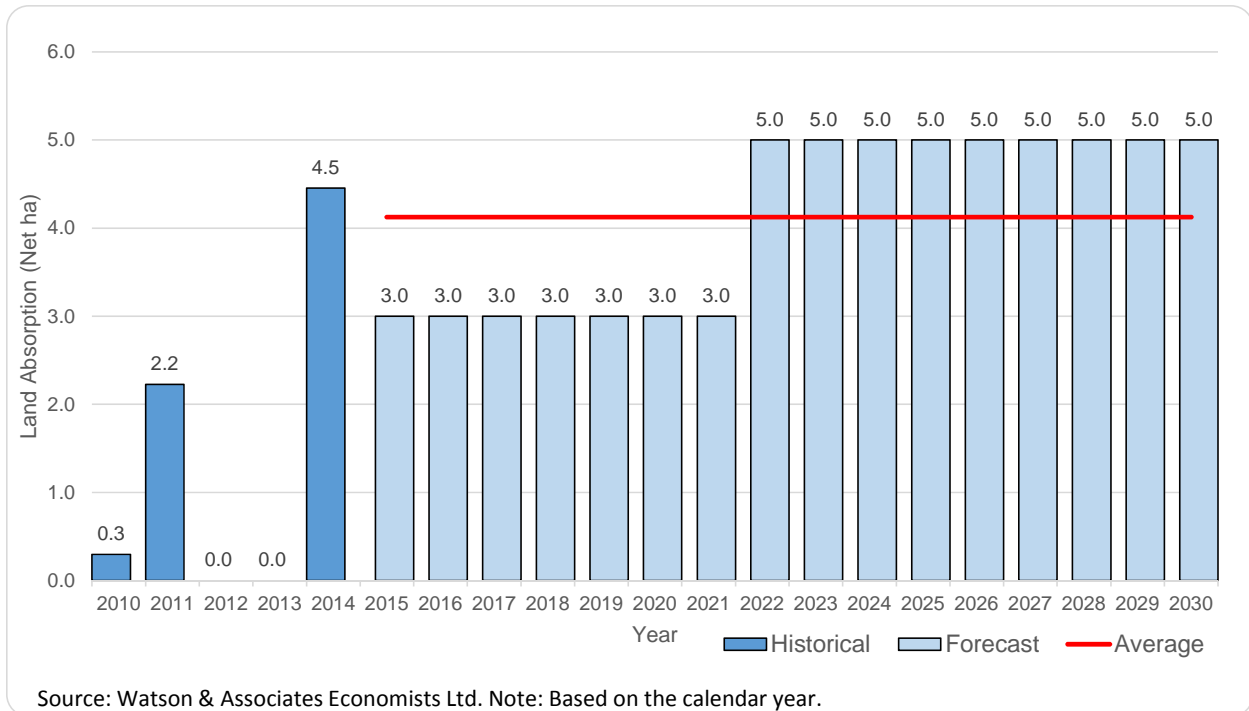
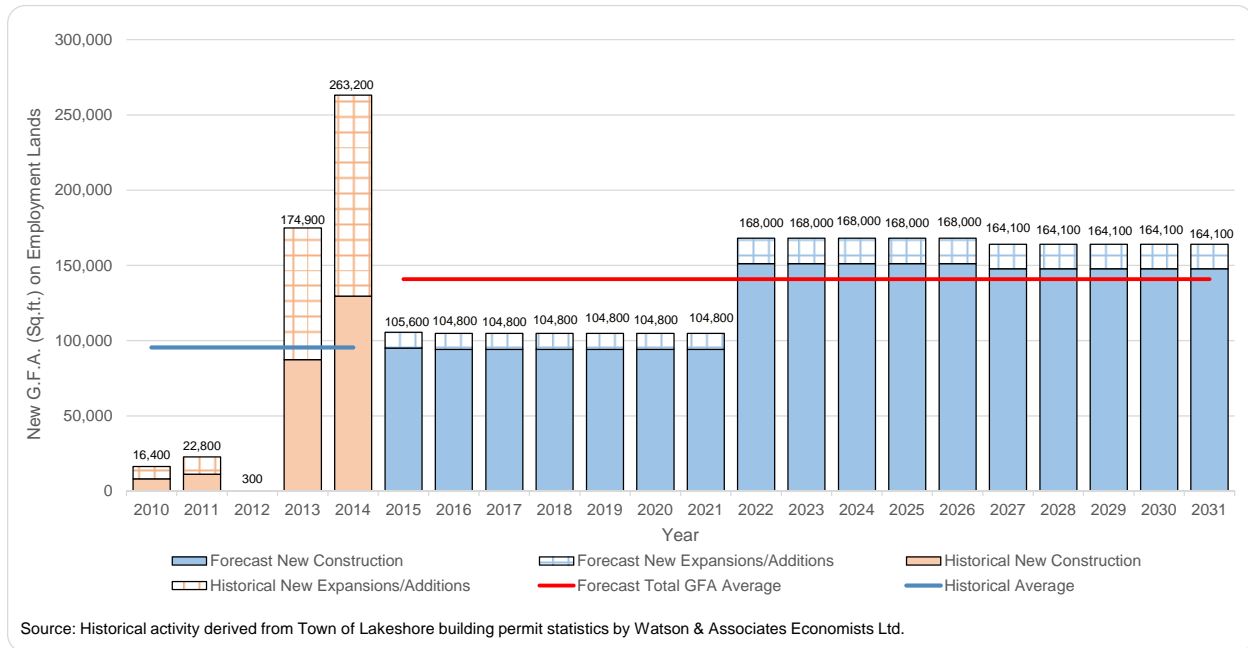


Figure 5-6 provides a conceptual illustration of annual forecast non-residential development activity (expressed in G.F.A.) on employment lands over the 2015 to 2031 planning horizon. During this time period, it is estimated that over 2.3 million sq.ft. of new G.F.A. will be added to the Town’s employment lands. Of this total, 10% of G.F.A. is anticipated in the form of additions/expansions.

**Figure 5-6  
Town of Lakeshore  
Historical and Forecast G.F.A. of Development on Urban Employment Lands,  
2015 to 2031**



### 5.3 Employment Land Needs within the Town of Lakeshore, 2015 to 2031

Figure 5-7 summarizes the long-term forecast need for employment lands within the Town of Lakeshore over the 2015 to 2031 planning horizon. In accordance with the existing supply of developable vacant employment lands versus long-term demand, Lakeshore has a surplus supply of approximately 132 net ha (325 net acres) of employment lands to meet long-term needs to 2031. It is noted that this identified surplus includes the designated employment land supply within the Wallace Woods Secondary Plan, which is calculated at 31 gross ha (77 gross acres).

**Figure 5-7**  
**Town of Lakeshore**  
**Total Urban Employment Land Needs**  
**(Demand vs. Supply), 2015 to 2031**

	2015 - 2031	
	Hectares	Acres
Net Employment Land Demand	67	165
Net Employment Land Supply	198	490
Net Employment Land Surplus/Shortfall	132	325

Source: Watson & Associates Economists Ltd.

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## 6. Conclusions

In accordance with the Essex-County Foundation Report (Low Growth Scenario), the Town of Lakeshore is forecast to experience moderate population and employment growth to the year 2031. The following provides a summary of the key findings provided in this report.

### **Provincial, Regional and Local Economic Trends**

The Ontario economy is facing significant structural changes. Over the past decade, the economic base, as measured by G.D.P. output, has shifted from goods-producing sectors (i.e. manufacturing, utilities and primary) to the service sector. Similar to the provincial economy as a whole, the nature of the Windsor-Essex Area economy is also changing.

For the Town of Lakeshore, established and emerging knowledge-based sectors such as professional, scientific and technical services, health care and social services, advanced manufacturing, education, training and research and agri-business are anticipated to represent key employment growth sectors. Over the forecast period, an increasing percentage of these sectors are anticipated to be located on employment lands.

While manufacturing remains vitally important to the provincial and regional economies with respect to jobs and economic output, this sector is not anticipated to support strong domestic labour force growth in the future. Looking forward, there will continue to be a manufacturing focus in the Windsor-Essex Area, including the Town of Lakeshore; however, industrial processes have become more capital intensive and automated as local industries are required to streamline production through increased product innovation, specialization and integration of technology. This means that as the domestic manufacturing sector continues to gradually recover, employment growth is anticipated to be modest.

Increased outsourcing of manufacturing production to emerging global markets will also continue to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced both locally and imported from abroad. This continues to drive demand for increasingly larger warehousing facilities, typically located in competitively priced greenfield locations within the Windsor-Essex Area with proximity/access to Highway 401. Generally, the physical attributes of the Town's Employment Areas (i.e. proximity/access to Highway 401) are desirable to the transportation and warehousing and wholesale trade sectors.



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## **Impact of Evolving Economic Trends on Planning for Employment Lands in the Town of Lakeshore**

In many respects Lakeshore's long-term employment potential is largely tied to the success of the Windsor-Essex Area as a whole. For many international and locally-based industries, the Town of Lakeshore has a strong appeal given its access to regional infrastructure and physical attributes (i.e. Highway 401-series, proximity to the U.S. border, rail access, access to labour, proximity to the U.S. employment markets, and potential synergies within nearby post-secondary institutions).

Notwithstanding the positive attributes, regional competition for the talent necessary to support innovation, investment and entrepreneurship is fierce. The degree to which the Town of Lakeshore can capitalize on its regional location advantages will depend largely on the competitiveness of its employment lands. Key to the Town's competitive position in this regard is an ample supply of shovel-ready employment lands which is well-aligned with market demands in terms of location, zoning and size requirements.

In response to evolving economic trends, there is increasing demand to accommodate employment-supportive commercial and community uses on employment lands, particularly in business parks which offer amenities and services convenient to local businesses and their employees. Furthermore, it is important that both existing and new Employment Areas are developed with sufficient critical mass and diversity to create a sense of place and vibrancy that will continue to attract industry, investment and a growing labour force pool to the Town. In turn, this will continue to enhance the Town's economic competitiveness and quality of life for its local residents.

### **Forecast Population, Housing and Employment Growth**

The following provides a summary of the key population, housing and employment growth trends anticipated for the Town of Lakeshore between 2015 and 2031.

- The Town's population is forecast to increase by approximately 4,800 persons over the forecast period, growing from 36,200 in 2015 to 41,000 in 2031. This represents an annual average increase of 0.8%. Comparatively, the Province of Ontario as a whole is forecast to increase at an annual average rate of 1.6% between 2016 and 2031.
- Lakeshore's housing base is forecast to increase from approximately 13,190 in 2015 to 15,120 in 2031, an increase of 1,930 or 0.9% annually.
- Average housing occupancy levels or P.P.U.s have declined in the Town of Lakeshore from 2.91 in 2001 to 2.80 in 2011. Over the forecast period, this

declining trend is expected to continue, however, average P.P.U. levels are anticipated to stabilize during the post-2031 period.

- The majority of new housing construction is anticipated to be oriented towards low-density housing forms (i.e. single and semi-detached homes), comprising 85% of the new residential construction between 2015 and 2031. Over the forecast period, the share of medium-density and high-density housing forms is anticipated to gradually increase, largely driven by the aging of the babyboomers.
- The Town's employment base is forecast to increase from 10,450 in 2015 to 15,180 in 2031, an increase of 4,730 or just under 300 jobs annually.
- Over the forecast period, the Town's employment activity rate (i.e. ratio of jobs per population) is expected to steadily increase from 29% in 2015 to 37% in 2031.

### **Town of Lakeshore Long-term Employment Lands Needs**

In accordance with forecast employment growth and net developable employment land supply, the following conclusions can be made regarding the Town's long-term employment land needs.

- The Town of Lakeshore has 198 net ha (489 net acres) of vacant, potentially developable employment land. Despite the availability of vacant employment land, the Town currently has a limited number of serviced, large, vacant, industrial parcels conducive for larger-scale industrial development.
- Over the 2015 to 2031 planning horizon, the Town is forecast to add a total of approximately 1,990 jobs on its designated employment lands. To accommodate this employment growth, Lakeshore is forecast to absorb 67 net ha (198 net acres) of employment lands, or 4 net ha (10 net acres) annually.
- Based on the Town's existing supply of developable vacant employment land, Lakeshore has a sufficient supply of employment lands to meet long-term employment land needs to 2031, assuming the Town's developable designated employment lands are serviced in a timely manner.

### **Recommendations**

- Building on baseline data provided herein, it is recommended that the Town monitor its employment land supply on a regular basis (i.e. annually).
- To ensure that Lakeshore's employment lands supply levels are not unduly constrained, it is recommended that the Town strive to provide a minimum five-year supply of designated and serviced employment lands at all times. This

should include a range of site selection choices by parcel configuration, designation, zoning and location.<sup>16</sup>

It is recommended that the Town's residential and non-residential land needs are comprehensively reviewed and updated in accordance with the Town's O.P. review schedule.

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<sup>16</sup> In accordance with forecast demand.

## **Appendix A – Population and Housing Growth Forecast by Key Growth Area**

**Figure A-1  
Maidstone**

Year	Population (Excluding Census Undercount)	Housing Units			Total Households	Person Per Unit (Excluding Census Undercount)
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		
<i>Mid 2011</i>	21,020	6,565	315	120	7,000	3.00
<i>Mid 2015</i>	22,500	7,030	360	120	7,510	3.00
<i>Mid 2021</i>	23,980	7,565	450	170	8,185	2.93
<i>Mid 2026</i>	24,890	7,895	510	200	8,605	2.89
<i>Mid 2031</i>	25,620	8,140	570	240	8,950	2.86
<b>Mid 2011 - Mid 2015</b>	<b>1,480</b>	<b>465</b>	<b>45</b>	<b>0</b>	<b>510</b>	
<b>Mid 2015 - Mid 2021</b>	<b>1,480</b>	<b>535</b>	<b>90</b>	<b>50</b>	<b>675</b>	
<b>Mid 2015 - Mid 2026</b>	<b>2,390</b>	<b>865</b>	<b>150</b>	<b>80</b>	<b>1,095</b>	
<b>Mid 2015 - Mid 2031</b>	<b>3,120</b>	<b>1,110</b>	<b>210</b>	<b>120</b>	<b>1,440</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-2  
Shoreline Development**

Year	Population (Excluding Census Undercount)	Housing Units			Total Households	Person Per Unit (Excluding Census Undercount)
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		
<i>Mid 2011</i>	830	335	0	0	335	2.48
<i>Mid 2015</i>	860	345	0	0	345	2.49
<i>Mid 2021</i>	890	360	0	0	360	2.47
<i>Mid 2026</i>	910	370	0	0	370	2.46
<i>Mid 2031</i>	920	380	0	0	380	2.42
<b>Mid 2011 - Mid 2015</b>	<b>30</b>	<b>10</b>	<b>0</b>	<b>0</b>	<b>10</b>	
<b>Mid 2015 - Mid 2021</b>	<b>30</b>	<b>15</b>	<b>0</b>	<b>0</b>	<b>15</b>	
<b>Mid 2015 - Mid 2026</b>	<b>50</b>	<b>25</b>	<b>0</b>	<b>0</b>	<b>25</b>	
<b>Mid 2015 - Mid 2031</b>	<b>60</b>	<b>35</b>	<b>0</b>	<b>0</b>	<b>35</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-3**  
**Comber**

Year	Population (Excluding Census Undercount)	Housing Units				Person Per Unit (Excluding Census Undercount)
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>	Total Households	
<i>Mid 2011</i>	1,060	355	5	40	400	2.65
<i>Mid 2015</i>	1,050	355	5	40	400	2.63
<i>Mid 2021</i>	1,050	365	5	40	410	2.56
<i>Mid 2026</i>	1,050	375	5	40	420	2.50
<i>Mid 2031</i>	1,060	375	5	40	420	2.52
<b>Mid 2011 - Mid 2015</b>	<b>-10</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
<b>Mid 2015 - Mid 2021</b>	<b>0</b>	<b>10</b>	<b>0</b>	<b>0</b>	<b>10</b>	
<b>Mid 2015 - Mid 2026</b>	<b>0</b>	<b>20</b>	<b>0</b>	<b>0</b>	<b>20</b>	
<b>Mid 2015 - Mid 2031</b>	<b>10</b>	<b>20</b>	<b>0</b>	<b>0</b>	<b>20</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-4**  
**Belle River Strip**

Year	Population (Excluding Census Undercount)	Housing Units				Person Per Unit (Excluding Census Undercount)
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>	Total Households	
<i>Mid 2011</i>	920	320	0	0	320	2.88
<i>Mid 2015</i>	920	325	0	0	325	2.83
<i>Mid 2021</i>	1,000	350	0	0	350	2.86
<i>Mid 2026</i>	1,040	360	0	0	360	2.89
<i>Mid 2031</i>	1,070	400	0	0	400	2.68
<b>Mid 2011 - Mid 2015</b>	<b>0</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>	
<b>Mid 2015 - Mid 2021</b>	<b>80</b>	<b>25</b>	<b>0</b>	<b>0</b>	<b>25</b>	
<b>Mid 2015 - Mid 2026</b>	<b>120</b>	<b>35</b>	<b>0</b>	<b>0</b>	<b>35</b>	
<b>Mid 2015 - Mid 2031</b>	<b>150</b>	<b>75</b>	<b>0</b>	<b>0</b>	<b>75</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-5  
Lighthouse Cove**

Year	Population (Excluding Census Undercount)	Housing Units			Person Per Unit (Excluding Census Undercount)	
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		Total Households
<i>Mid 2011</i>	590	275	0	0	275	2.15
<i>Mid 2015</i>	600	285	0	0	285	2.11
<i>Mid 2021</i>	790	345	0	0	345	2.29
<i>Mid 2026</i>	910	380	0	0	380	2.39
<i>Mid 2031</i>	1,000	410	0	0	410	2.44
<b>Mid 2011 - Mid 2015</b>	<b>10</b>	<b>10</b>	<b>0</b>	<b>0</b>	<b>10</b>	
<b>Mid 2015 - Mid 2021</b>	<b>190</b>	<b>60</b>	<b>0</b>	<b>0</b>	<b>60</b>	
<b>Mid 2015 - Mid 2026</b>	<b>310</b>	<b>95</b>	<b>0</b>	<b>0</b>	<b>95</b>	
<b>Mid 2015 - Mid 2031</b>	<b>400</b>	<b>125</b>	<b>0</b>	<b>0</b>	<b>125</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-6  
Stoney Point**

Year	Population (Excluding Census Undercount)	Housing Units			Person Per Unit (Excluding Census Undercount)	
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		Total Households
<i>Mid 2011</i>	1,420	510	5	15	530	2.68
<i>Mid 2015</i>	1,420	510	5	15	530	2.68
<i>Mid 2021</i>	1,740	620	5	15	640	2.72
<i>Mid 2026</i>	1,940	685	5	15	705	2.75
<i>Mid 2031</i>	2,080	735	5	15	755	2.75
<b>Mid 2011 - Mid 2015</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
<b>Mid 2015 - Mid 2021</b>	<b>320</b>	<b>110</b>	<b>0</b>	<b>0</b>	<b>110</b>	
<b>Mid 2015 - Mid 2026</b>	<b>520</b>	<b>175</b>	<b>0</b>	<b>0</b>	<b>175</b>	
<b>Mid 2015 - Mid 2031</b>	<b>660</b>	<b>225</b>	<b>0</b>	<b>0</b>	<b>225</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-7**  
**North/South Woodslee**

Year	Population (Excluding Census Undercount)	Housing Units			Person Per Unit (Excluding Census Undercount)	
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		Total Households
<i>Mid 2011</i>	880	305	10	0	315	2.79
<i>Mid 2015</i>	910	315	10	0	325	2.80
<i>Mid 2021</i>	970	340	10	0	350	2.77
<i>Mid 2026</i>	1,010	360	10	0	370	2.73
<i>Mid 2031</i>	1,040	370	10	0	380	2.74
<b>Mid 2011 - Mid 2015</b>	<b>30</b>	<b>10</b>	<b>0</b>	<b>0</b>	<b>10</b>	
<b>Mid 2015 - Mid 2021</b>	<b>60</b>	<b>25</b>	<b>0</b>	<b>0</b>	<b>25</b>	
<b>Mid 2015 - Mid 2026</b>	<b>100</b>	<b>45</b>	<b>0</b>	<b>0</b>	<b>45</b>	
<b>Mid 2015 - Mid 2031</b>	<b>130</b>	<b>55</b>	<b>0</b>	<b>0</b>	<b>55</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-8**  
**Hamlets**

Year	Population (Excluding Census Undercount)	Housing Units			Person Per Unit (Excluding Census Undercount)	
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		Total Households
<i>Mid 2011</i>	760	320	5	0	325	2.34
<i>Mid 2015</i>	780	330	5	0	335	2.33
<i>Mid 2021</i>	810	350	5	0	355	2.28
<i>Mid 2026</i>	830	360	5	0	365	2.27
<i>Mid 2031</i>	850	365	5	0	370	2.30
<b>Mid 2011 - Mid 2015</b>	<b>20</b>	<b>10</b>	<b>0</b>	<b>0</b>	<b>10</b>	
<b>Mid 2015 - Mid 2021</b>	<b>30</b>	<b>20</b>	<b>0</b>	<b>0</b>	<b>20</b>	
<b>Mid 2015 - Mid 2026</b>	<b>50</b>	<b>30</b>	<b>0</b>	<b>0</b>	<b>30</b>	
<b>Mid 2015 - Mid 2031</b>	<b>70</b>	<b>35</b>	<b>0</b>	<b>0</b>	<b>35</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.



**Figure A-9  
Fringe**

Year	Population (Excluding Census Undercount)	Housing Units			Person Per Unit (Excluding Census Undercount)	
		Single/Semi- Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		Total Households
<i>Mid 2011</i>	250	90	0	5	95	2.63
<i>Mid 2015</i>	260	95	0	5	100	2.60
<i>Mid 2021</i>	300	110	0	5	115	2.61
<i>Mid 2026</i>	330	120	0	5	125	2.64
<i>Mid 2031</i>	350	125	0	5	130	2.69
<b>Mid 2011 - Mid 2015</b>	<b>10</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>	
<b>Mid 2015 - Mid 2021</b>	<b>40</b>	<b>15</b>	<b>0</b>	<b>0</b>	<b>15</b>	
<b>Mid 2015 - Mid 2026</b>	<b>70</b>	<b>25</b>	<b>0</b>	<b>0</b>	<b>25</b>	
<b>Mid 2015 - Mid 2031</b>	<b>90</b>	<b>30</b>	<b>0</b>	<b>0</b>	<b>30</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes and apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments.

**Figure A-10  
Rural**

Year	Population (Excluding Census Undercount)	Housing Units			Person Per Unit (Excluding Census Undercount)	
		Single/Semi Detached	Townhomes <sup>1</sup>	Apartments <sup>2</sup>		Total Households
<i>Mid 2011</i>	6,820	2,735	0	0	2,735	2.49
<i>Mid 2015</i>	6,880	2,770	0	0	2,770	2.48
<i>Mid 2021</i>	6,940	2,845	0	0	2,845	2.44
<i>Mid 2026</i>	6,970	2,890	0	0	2,890	2.41
<i>Mid 2031</i>	6,990	2,920	0	0	2,920	2.39
<b>Mid 2011 - Mid 2015</b>	<b>60</b>	<b>35</b>	<b>0</b>	<b>0</b>	<b>35</b>	
<b>Mid 2015 - Mid 2021</b>	<b>60</b>	<b>75</b>	<b>0</b>	<b>0</b>	<b>75</b>	
<b>Mid 2015 - Mid 2026</b>	<b>90</b>	<b>120</b>	<b>0</b>	<b>0</b>	<b>120</b>	
<b>Mid 2015 - Mid 2031</b>	<b>110</b>	<b>150</b>	<b>0</b>	<b>0</b>	<b>150</b>	

Source: Watson & Associates Economists Ltd. 2015

<sup>1</sup> Includes townhomes apartments in duplexes.

<sup>2</sup> Includes Bachelor, 1 bedroom and 2+ bedroom apartments .