One Land,
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One Future,
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Growth Analysis Report

Essex County

Final Report

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
B.C.C.I.C.	British Columbia Council for International Cooperation
COVID-19	Coronavirus disease
C.R.	Comprehensive Review
D.C.B.S.	Development Charges Background Study
E.V.	electric vehicle
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
IPCC	Intergovernmental Panel on Climate Change
L.G.E.S.	L.G. Energy Solution
L.Q.	Location quotient
M.O.F.	Ministry of Finance
N.F.P.O.W.	No fixed place of work
NHS	National Household Survey
N.P.R.	Non-permanent residents
O.P.	Official Plan
P.M.I.	Purchasing Managers' Index
P.P.S.	Provincial Policy Statement
P.P.U.	persons per unit
SWIFT	Southwestern Integrated Fibre Technology

List of Acronyms and Abbreviations (Cont'd)

U.S.	United States
V.P.N.	Virtual private networks
W.H.O.	World Health Organization

Executive Summary

Executive Summary

Introduction

The Essex County Official Plan (O.P.) was last updated and approved in April 2014. In accordance with the *Planning Act*, R.S.O, 1990, an approved O.P. can be reviewed at any time, but each local council is required to update its O.P. not less than 10 years from the date the plan came into effect and every five years thereafter. As part of its O.P. review exercise, Essex County is now embarking on its Comprehensive Review (C.R.) update, which requires an update of the County's long-term growth projections and urban land requirements. The results of this analysis are also intended to guide decision-making and policy development specifically related to long-term planning and growth management, municipal finance and infrastructure planning carried out for Essex County.

Phase 1 of this C.R. exercise provides an update to the County's long-term population, household and employment growth forecasts and allocations by Area Municipality to the year 2051. The results of this Phase 1 report are based on recent development trends, available Census data, and other new relevant information available since the release of the previous population projections report. [1]The results of this Phase 1 analysis will be used as part of future phases of the Official Plan Review to assess long-term urban land needs County-wide.

Essex County Population, Housing and Employment Growth Trends, 2001 to 2021

Over the past 20 years, Essex County has experienced uneven population growth, which has been largely influenced by periods of regional economic growth and contraction within the Windsor-Essex Area. Over the 2001 to 2006 period, the Essex the County's population grew steadily at a rate of 1.1% annually. The Windsor-Essex Area economy was hit particularly hard following the 2008/2009 global financial crisis which resulted in steady job losses in this area between 2011 and 2016 and a period of modest population growth (0.2% annually) throughout the 2006 to 2016 period. Since 2016, the rate of population growth across the County has increased substantially, driven by steady immigration across all major demographic groups (i.e., children, adults

[1] Foundation Report: Essex County Official Plan Review prepared by N. Barry Lyon Consultants Ltd., August 2011.

and seniors). Between 2016 and 2021, the County's annual population increased at a rate of 1.2%, fueling steady demand for new housing construction throughout the County.

Immigration levels, including non-permanent residents (N.P.R.) were relatively higher across the Windsor-Essex Area between 2016 and 2021 compared to longer-term historical averages over the past twenty years. Within Essex County, population growth related to N.P.R. has also been a key driver of population growth and housing need, most notably in the Municipality of Leamington associated with on-site and off-site farm migrant workers.

During the past twenty years, particularly during the 2006 to 2011 period, population growth rates throughout the Windsor-Essex Area were diminished as a result of out-migration to other destinations in Ontario and elsewhere in Canada. During the 2016 to 2021 period, this out-migration trend significantly declined. In fact, during this recent five-year Census period, the Windsor-Essex Area experienced positive net migration from destinations within Canada, outside of Ontario.

Strong population growth during this time period was largely driven by the County's competitively priced housing market relative to other larger urban centres in Ontario, combined with the gradual recovery of the regional economy since the 2008/2009 global economic recession. Both the City of Windsor and Essex County experienced a steady increase in residential building permit activity starting around 2015, relative to longer-term averages. During this time period, however, population growth rates were stronger within Essex County relative to the City of Windsor.

While coronavirus disease (COVID-19) had very disruptive impacts on the regional economy, particularly in retail, accommodation and food and tourism-based sectors largely during 2021, the pandemic further accelerated housing development activity broadly across the Windsor-Essex Area between mid-2020 through to the spring of 2022. Looking forward over the next five to 10 years, housing demand across the Windsor-Essex Area is anticipated to remain strong relative to recent historical levels, fueled by steady immigration as well as positive net migration from elsewhere in Ontario and Canada. Regional employment opportunities also represent a key driver of population growth across the Windsor-Essex Area. It is noted, however, that continued housing appreciation and declining housing affordability, combined with a range of broader economic headwinds, including tightening monetary policy (i.e. rising interest

rates, quantitative tightening), persistently high inflation rates, rising household debt and increased geo-political uncertainty are anticipated to moderate housing demand, particularly ownership housing, in the near term relative to recent trends experienced between mid-2020 to early 2022.

Historically, residential development activity within Essex County has been heavily concentrated in low-density housing forms (i.e., singles and semi-detached). In recent years, from 2016 to 2021, the County has experienced a shift toward a higher share of medium-density and high-density housing forms, which have accounted for approximately 25% of all new residential construction.

The population base of Essex County is older on average and aging at a slightly faster rate than the Province as a whole. The County is also highly attractive to empty nesters and retirees within the 55+ age group, given the opportunities that the County provides associated with both urban and rural living within its vibrant urban communities, hamlets and villages and remaining rural areas. Access to recreation associated with the Lake Erie, Lake St. Clair and Detroit River shoreline as well as the surrounding rural countryside also represents a key draw to this area.

As the County's Baby Boom population continues to age, the 75+ age group is anticipated to represent the fastest growing population segment within the County. While strong net migration within the 55+ age group generates considerable economic development opportunities for the broader region, the aging of the County's population base also poses challenges for the County. First, an aging population is anticipated to place downward pressure on the rate of long-term total population growth within the County due to declining growth from natural increase (i.e., births less deaths). Similar to the Province as a whole, the County will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions. Second, an aging labour force is also anticipated to place downward pressure on long-term economic growth driven by declining labour force participation and potential labour shortages.

It is also important to recognize that forecast population growth rates are not anticipated to be homogenous across the County. In the County's less developed settlement areas and rural areas, forecast population growth rates are anticipated to be relatively lower in areas that offer limited new housing growth potential. Conversely, the aging population base is anticipated to place increasing development pressures on the County's more

developed urban areas which have available municipal servicing capacity and public amenities. For example, the aging of the County's population is anticipated to drive the need for seniors' housing and other housing forms geared to older adults (e.g., assisted living, affordable housing, adult lifestyle housing) that are not available, or cannot be provided for, in smaller communities or within the surrounding rural area. These trends will be further explored in Phase 2.

In summary, the demographic and socio-economic trends explored in this report will continue to have broad implications on the amount, type and density of future housing needs, municipal service needs and public infrastructure requirements for the County over the long-term.

Essex County Employment Growth Outlook to 2051

It is important to recognize that future population and employment growth within Essex County strongly correlated with the growth outlook and competitiveness of the broader Windsor-Essex Area and surrounding region, specifically the surrounding municipalities which fall within the County's commuter-shed.

The County's urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. Over the past two years, COVID-19 has acted as a near-term driver of housing demand, led by increased opportunities for remote, or distributed, work and the reconsideration by some Ontario residents to trade "city lifestyles" for a greater balance of urban and rural living. It is recognized, however, that the longer-term population and employment growth potential for the County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand in Essex County over the long term.

Similar to historical population trends, the County has experienced periods of employment growth and decline over the past 20 years resulting from occasions of economic expansion and contraction across the broader Windsor-Essex Area economy during this time. Over the past decade, Essex County has experienced steady employment growth across a broad range of sectors including health care and social services, manufacturing, retail, accommodation and food services, professional, technical and scientific services, and agriculture. Looking forward, each of the County's

established and emerging employment sectors are anticipated to experience employment growth to varying degrees, particulary those sectors which are more closely tied to the knowledge-based economy. While the County's employment base is comprised of a broad range of business by size, it is anticipated that employment growth across the County will continue to be geared towards small businesses, including home-based occupations. [1]

Steady future economic growth is anticipated across the Windsor-Essex Area, most notably associated with the need for local supply chains to support the planned Stellantis N.V and L.G. Energy Solution (L.G.E.S.) electric vehicle (E.V.) battery manufacturing facility. The joint venture company will invest over $5 billion CAD to establish the facility, which is scheduled to be operational by 2024 and estimated to create approximately 3,200 direct new jobs.[2] An additional 15,000 indirect jobs associated with the regional supply chain are also anticipated to support the planned facility.[3] Furthermore, the facility is anticipated to generate induced economic impacts associated with the re-spending of labour income (i.e., household spending) throughout the Windsor-Essex Area and beyond. Anticipated export-based job growth (i.e., industrial and commercial office jobs) within the Windsor-Essex Area also generates population-related employment to service the needs of the growing employment and population base (e.g., retail, accommodation and food, personal services and institutional services).

Given the competitive position of existing and planned Employment Areas across the County, as measured in terms of location/access to major North American employment markets and large population centres, parcel size, price per acre, and competitive development costs, etc., Essex County is anticipated to achieve a relatively stronger rate of industrial absorption over the long-term planning horizon under all three growth scenarios.

[1] As of 2021, it is estimated that 8% of employment in Essex County is comprised of Work at Home jobs. 2019 Canadian Business Patterns data for Essex County was also analyzed which illustrated that 49% of businesses have between 1-4 employees, 21% have 5-9 employees and 15% have 10-19 employees.
[2] https://www.stellantis.com/en/news/press-releases/2022
[3] BIZ X MAGAZINE: Windsor's EV Battery Plant – Rose City Politics (rcpwindsor.ca)

Home to over 1,700 farms, and the largest and most intensive greenhouse growing area in Canada, agricultural activities are significant to the overall Essex County economy.[1] The agri-business and food processing sectors provide an opportunity to deepen agricultural activity and increase productivity of the industry by providing value-added products and services to the regional economy, including the tourism sector. Over 80% of the land area in Essex County is farmland. Flat terrain, a mild climate, good quality soils and a long growing season all combine to provide a good opportunity for successful and diversified farming activities. Approximately 90% of the land within Essex County is considered, by provincial definition, prime agricultural land (i.e., specialty crop areas and/or Class 1, 2 and 3 soils in the Canada Land Inventory system). Essex County is the largest and most intensive greenhouse growing area in Canada, estimated at approximately 5.5 million square metres (59 million square feet), comprising over 47% of Ontario's acreage related to greenhouse operations.

Over the next three decades, Essex County is projected to add 15 million square metres (161 million square feet) of greenhouse development activity to its existing base as of 2022. Collectively, this additional greenhouse development activity is anticipated to generate approximately 8,000 new jobs within the agricultural sector, largely within the Municipality of Leamington and, to a lesser extent, within the Town of Kingsville and the Town of Essex. These jobs are almost exclusively filled by migrant workers. As a result of anticipated employment growth in the agricultural sector, additional housing opportunities will also be required to accommodate both on-farm and off-farm migrant workers associated with greenhouse development activity.

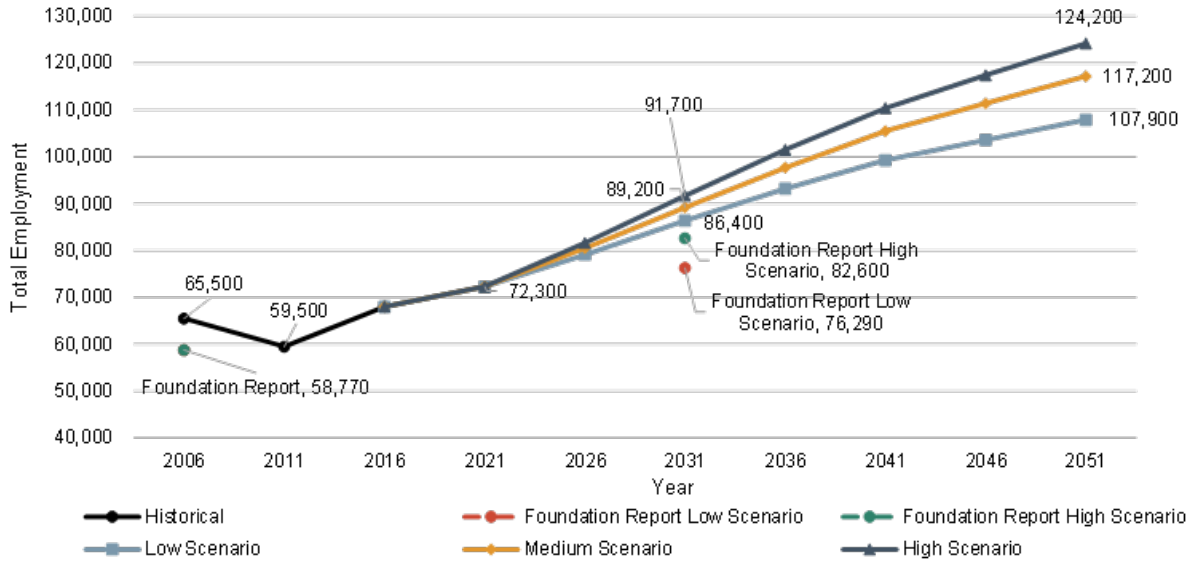
As the local employment base continues to grow and diversify, Essex County will continue to be a desirable location for workers to live and work, leading to steady population growth across the County. Over the next 30 years, the County's local employment base is anticipated to benefit from the local and regional economic expansion anticipated within the County and the surrounding area. In particular, economic opportunities across the broader economy are noted in established and emerging knowledge-based employment sectors related to advanced manufacturing, agri-business, professional, technical and scientific services, other business services, health care and education and information technology. As such, raising the economic profile of Essex County by leveraging the economic opportunities and strengths of the

[1] Essex County Federation of Agriculture. ECFA

broader regional economy is recommended as a key long-term economic development strategy for Essex County.

Figure ES-1 summarizes three long-term employment forecast scenarios for Essex County over the 2021 to 2051 forecast period relative to historical employment trends between 2001 and 2021. By 2051, Essex County's employment base is forecast to grow to between approximately 108,000 and 124,000. This represents an increase of approximately 36,000 to 52,000 jobs between 2021 and 2051.

Figure ES-1
Essex County
Long-Term Total Employment Forecast Scenarios, 2021 to 2051



Source: Foundation Report Lowand High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.
Note: Total employment includes no fixed place of work and work at home employment.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	72,300	107,900	35,600	1,200	1.3%
Medium Scenario	72,300	117,200	44,900	1,500	1.6%
High Scenario	72,300	124,200	51,900	1,700	1.8%

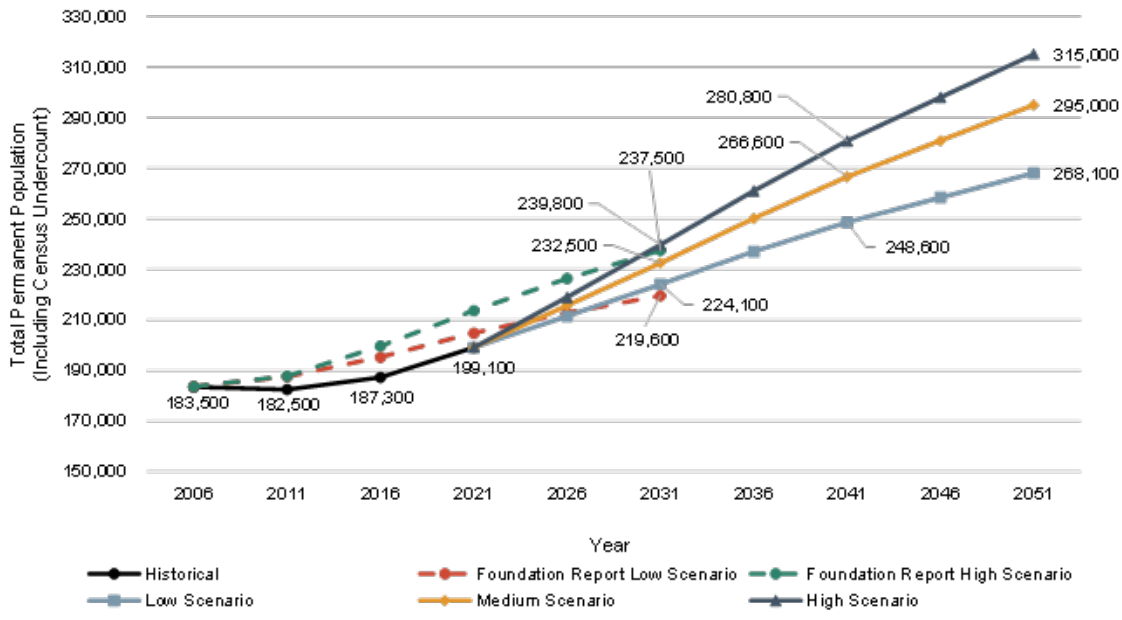
Note: Figures may not add precisely due to rounding.
Source: 2021 derived from Statistics Canada Census data and 2051 by Watson & Associates Economists Ltd.

Essex County Population and Housing Growth Outlook to 2051

Figure ES-2 summarizes three long-term population forecast scenarios for Essex County over the 2021 to 2051 forecast period relative to historical population between 2001 and 2021. By 2051, Essex County's total population base is forecast to grow to approximately 268,000 to 315,000. This represents an increase of approximately 69,000 to 116,000 persons between 2021 and 2051.

It is noted that a recommended scenario has not been provided as part of this Phase 1 C.R. analysis to allow a detailed assessment of the corresponding urban land requirements over the next 25 years associated with each scenario. This approach is also intended to provide greater flexibility to each of the County's area municipalities regarding the use of these long-term growth scenarios for the purposes of long-range land use planning, infrastructure master plans and municipal service delivery.

Figure ES-2
Essex County
Long-term Forecast Population Scenarios, 2021 to 2051



Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.
Note: Population includes net Census undercount.

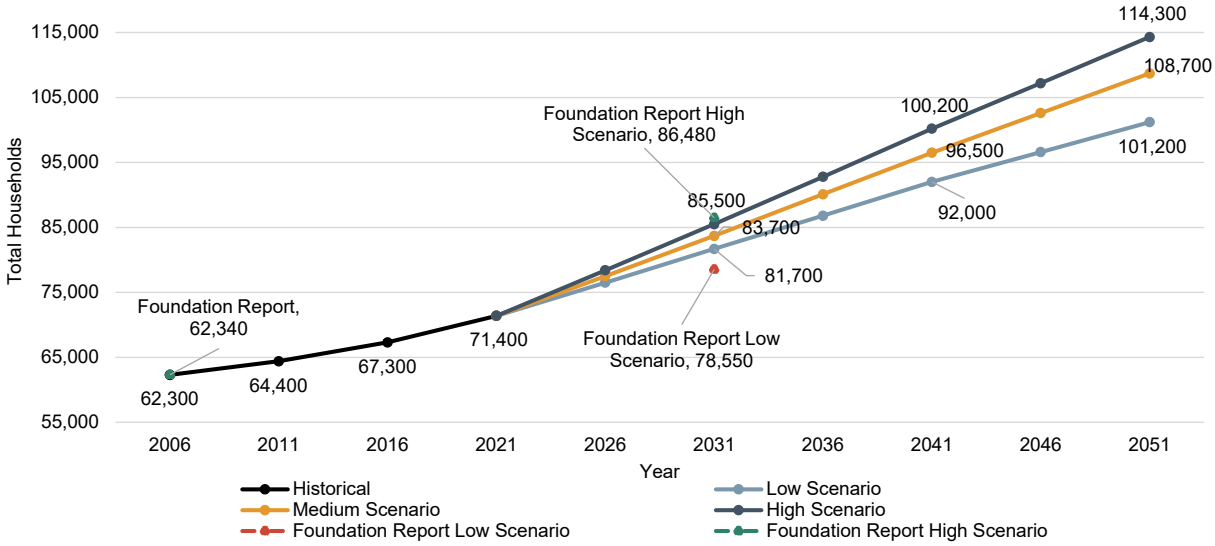
Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	199,100	268,100	69,000	2,300	1.0%
Medium Scenario	199,100	295,000	95,900	3,200	1.3%
High Scenario	199,100	315,000	115,900	3,900	1.5%

Note: Figures may not add precisely due to rounding.
Source: 2021 derived from Statistics Canada Census data and 2051 by Watson & Associates Economists Ltd.

To accommodate the long-term Population Growth Scenario, the County will require between 29,700 and 42,900 additional households over the 2021 to 2051 planning horizon. Figure ES-3 provides a summary of the County's anticipated housing needs by structure type in five-year increments over the 2021 to 2051 based on the Medium Housing Growth Scenario. For additional context, historical housing growth trends by structure type in five-year increments are also provided. Over the 30-year forecast period Essex County is forecast to average just under 1,250 new households per year, representing an 80% increase in annual housing activity when compared to annual housing development over the past 20 years in accordance with Statistics Canada data.[1] New residential development within Essex County is anticipated to gradually shift away from low-density housing forms, largely driven by declining housing affordability associated with low-density housing options, as well as the increased demand for high-density housing associated with seniors and the increase in the share of population aged 65+. This shift in the share of medium- and high-density housing forms is anticipated to be more pronounced in the County's urban areas associated with the stronger market demand and available infrastructure to support residential intensification and higher density housing forms in these areas. Over the 2021 to 2051 forecast period, new housing development is projected to comprise 48% low-density (singles and semi-detached), 27% medium-density (townhouses) and 25% high-density (apartment) housing units.

[1] It is noted that the number of residential building permits (new units only) issued between 2016 and 2021 far exceeded the household growth reported by the Census between 2016 and 2021, as a large number of these residential building permits were not occupied during the 2021 Census enumeration. These residential building permits are expected to be captured in the 2026 Census.

Figure ES-3
Essex County
Long-term Household Forecast Scenarios, 2021 to 2051

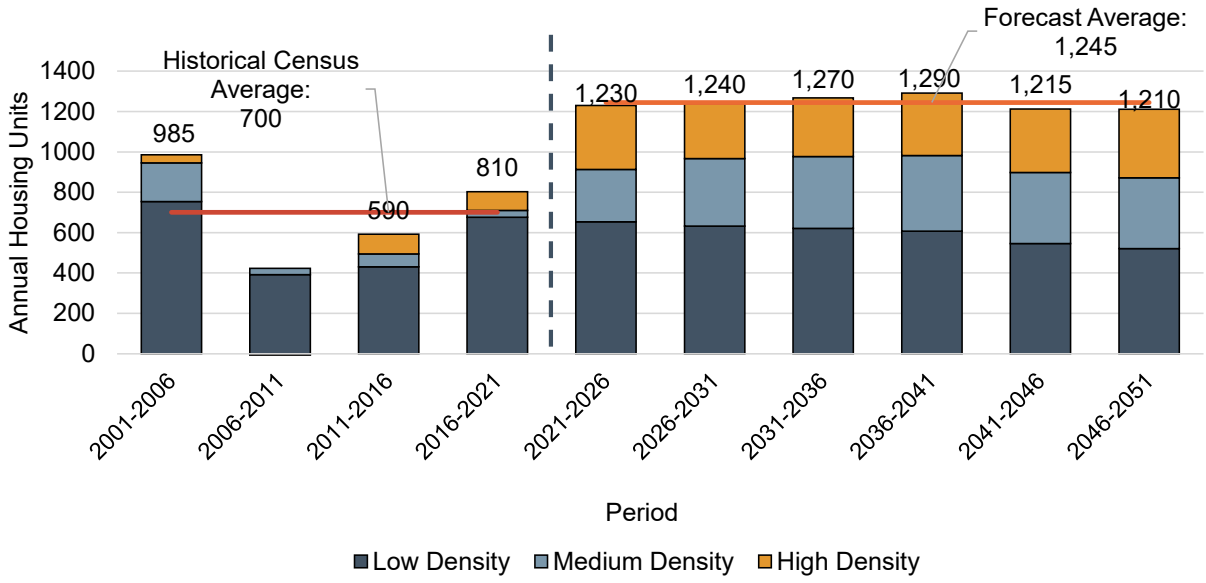


Note: Population includes net Census undercount.
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	71,400	101,200	29,800	1,000	1.2%
Medium Scenario	71,400	108,700	37,300	1,200	1.4%
High Scenario	71,400	114,300	42,900	1,400	1.6%

Note: Figures may not add precisely due to rounding.
Source: 2021 derived from Statistics Canada Census data and 2051 by Watson & Associates Economists Ltd.

Figure ES-4
Essex County
Forecast Households by Structure Type, Medium Scenario, 2021 to 2051



To ensure that economic growth is not constrained by future labour shortages, effort will be required by Essex County to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the County within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.

Population and Employment Growth Allocations by Area Municipality, 2016 to 2051

Figures ES-4 though ES-8 summarize the County's long-term population, housing and employment forecast by Area Municipality over the 2021 to 2051 planning horizon under the Medium Growth Scenario (refer to Appendix G for additional details regarding the low, medium and high growth scenario).

While forecast population, housing and employment growth rates vary across each of the Area Municipalities within Essex County, they share a number of relatively common

attributes with respect to long-term residential development and demographic trends, including:

- All the Area Municipalities within Essex County are anticipated to experience higher levels of annual population and housing growth over the 2021 to 2051 forecast period relative to the past 20 years. Under each of the long-term range growth scenarios, the share of population and employment growth by Area Municipality is anticipated to remain relatively consistent.
- Over the longer term (i.e. 10+ years), the average rate of annual housing development is anticipated to gradually slow across all Area Municipalities within Essex County as well as the City of Windsor, relative to recent residential development activity. This trend is anticipated as a result of slower regional and provincial economic growth associated with an aging population and labour force.
- Within Essex County, new housing construction is anticipated across a diverse range of housing forms. Increased market demand is anticipated over the next three decades for medium-density and high-density housing as the regional population base continues to age and diversify. As previously noted, declining housing affordability also represents a key driver contributing to a higher portion of medium- and high-density housing forms.
- Average housing occupancy levels are forecast to decline over the long-term forecast period for all Area Municipalities in Essex County. This demographic trend is largely associated with the aging of the County's population base associated with Baby Boomers and Millennials.
- The share of future housing demand is anticipated to continue to increase in the County's urban areas largely driven by new families in search of competitively priced, ground-oriented housing located within proximity to local urban amenities (i.e., schools, retail, personal service uses) and surrounding employment markets.
- Housing demands from the 55-74 age group (empty nester/younger seniors) and the 75+ age group (older seniors) are also anticipated to drive the future need for urban housing across all Area Municipalities in Essex County. As previously noted, housing demand associated with older seniors (75+) is largely anticipated from the existing population base and, to a lesser extent, through net migration.

Figure ES-4
Essex County
Population Forecast by Area Municipality

Low Scenario, 2021 to 2051**Error! Not a valid link.**Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure ES-5
Essex County
Household Forecast by Area Municipality
Low Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	8,520	8,090	7,975	10,685	13,175	10,005	8,885	67,335
2021	9,185	8,380	8,290	11,640	14,380	10,535	8,945	71,395
2026	9,795	8,730	8,820	12,605	15,335	11,335	9,875	76,540
2031	10,410	9,065	9,370	13,540	16,285	12,215	10,800	81,720
2036	11,005	9,395	9,900	14,470	17,220	13,090	11,725	86,845
2041	11,590	9,720	10,425	15,390	18,150	13,970	12,660	91,950
2046	12,095	10,010	10,900	16,240	18,985	14,760	13,520	96,560
2051	12,605	10,305	11,360	17,090	19,825	15,540	14,400	101,155
2021-2031	1,225	685	1,080	1,900	1,905	1,680	1,855	10,325
2021-2041	2,405	1,340	2,135	3,750	3,770	3,435	3,715	20,555
2021-2051	3,420	1,925	3,070	5,450	5,445	5,005	5,455	29,760

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure ES-6
Essex County
Employment Forecast by Area Municipality
Low Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	5,600	6,700	7,500	6,500	13,900	12,500	15,400	68,000
2021	5,800	6,800	7,400	6,700	14,300	15,200	16,200	72,300
2026	6,200	7,400	8,100	7,400	15,600	17,300	17,100	79,100
2031	6,800	8,000	8,800	8,200	17,100	19,500	18,000	86,400
2036	7,300	8,600	9,500	8,900	18,500	21,500	19,000	93,200
2041	7,800	9,000	10,100	9,600	19,700	23,400	19,800	99,300
2046	8,100	9,400	10,500	10,100	20,700	24,400	20,500	103,600
2051	8,500	9,700	10,900	10,600	21,600	25,400	21,200	107,900
2021-2031	1,000	1,200	1,400	1,500	2,800	4,300	1,800	14,100
2021-2041	2,000	2,200	2,700	2,900	5,400	8,200	3,600	27,000
2021-2051	2,700	2,900	3,500	3,900	7,300	10,200	5,000	35,600

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure ES-7
Essex County
Population Forecast by Area Municipality
Medium Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	22,600	21,100	22,200	31,100	37,800	28,500	24,000	187,300
2021	24,300	21,900	22,800	33,800	41,700	30,600	24,000	199,100
2026	26,400	23,100	24,600	36,700	45,000	33,400	26,600	215,600
2031	28,500	24,200	26,400	39,600	48,200	36,300	29,200	232,500
2036	30,700	25,500	28,300	42,600	51,700	39,400	31,900	250,100
2041	32,700	26,600	30,100	45,500	54,900	42,400	34,600	266,600
2046	34,400	27,500	31,600	48,000	57,600	44,900	36,900	280,900
2051	36,100	28,300	33,100	50,500	60,300	47,500	39,300	295,000
2021-2031	4,200	2,300	3,600	5,800	6,500	5,700	5,200	33,400
2021-2041	8,400	4,700	7,300	11,700	13,200	11,800	10,600	67,500
2021-2051	11,800	6,400	10,300	16,700	18,600	16,900	15,300	95,900

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure ES-8
Essex County
Household Forecast by Area Municipality
Medium Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	8,520	8,090	7,975	10,685	13,175	10,005	8,885	67,335
2021	9,185	8,380	8,290	11,640	14,380	10,535	8,945	71,395
2026	9,920	8,800	8,925	12,790	15,520	11,505	10,055	77,545
2031	10,645	9,195	9,575	13,910	16,655	12,560	11,160	83,745
2036	11,385	9,605	10,245	15,055	17,815	13,640	12,300	90,085
2041	12,120	10,015	10,910	16,230	18,995	14,755	13,490	96,545
2046	12,800	10,400	11,525	17,340	20,095	15,790	14,625	102,605
2051	13,465	10,780	12,130	18,460	21,190	16,825	15,775	108,670
2021-2031	1,460	815	1,285	2,270	2,275	2,025	2,215	12,350
2021-2041	2,935	1,635	2,620	4,590	4,615	4,220	4,545	25,150
2021-2051	4,280	2,400	3,840	6,820	6,810	6,290	6,830	37,275

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure ES-9
Essex County
Employment Forecast by Area Municipality
Medium Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	5,600	6,700	7,500	6,500	13,900	12,500	15,400	68,000
2021	5,700	6,800	7,400	6,600	14,100	15,100	16,200	71,900
2026	6,400	7,500	8,200	7,600	16,000	17,500	17,400	80,500
2031	7,100	8,300	9,100	8,600	17,800	19,900	18,600	89,200
2036	7,800	9,000	9,900	9,500	19,700	22,100	19,800	97,700
2041	8,400	9,600	10,700	10,400	21,400	24,200	20,900	105,500
2046	8,900	10,000	11,200	11,100	22,800	25,500	21,900	111,400
2051	9,400	10,500	11,800	11,800	24,200	26,700	22,900	117,200
2021-2031	1,400	1,500	1,700	2,000	3,700	4,800	2,400	17,300
2021-2041	2,700	2,800	3,300	3,800	7,300	9,100	4,700	33,600
2021-2051	3,700	3,700	4,400	5,200	10,100	11,600	6,700	45,300

Note: Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure ES-10
Essex County
Population Forecast by Area Municipality
High Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	22,600	21,100	22,200	31,100	37,800	28,500	24,000	187,300
2021	24,300	21,900	22,800	33,800	41,700	30,600	24,000	199,100
2026	26,800	23,300	25,000	37,300	45,600	33,900	27,100	219,000
2031	29,400	24,800	27,200	40,800	49,700	37,500	30,200	239,800
2036	32,000	26,400	29,500	44,500	53,900	41,200	33,500	261,000
2041	34,500	27,700	31,700	47,900	57,700	44,700	36,600	280,800
2046	36,500	28,800	33,500	50,900	61,000	47,800	39,400	298,000
2051	38,500	29,900	35,200	53,900	64,200	50,900	42,300	315,000
2021-2031	5,100	2,900	4,400	7,000	8,000	6,900	6,200	40,700
2021-2041	10,200	5,800	8,900	14,100	16,000	14,100	12,600	81,700
2021-2051	14,200	8,000	12,400	20,100	22,500	20,300	18,300	115,900

Figure ES-11
Essex County
Household Forecast by Area Municipality
High Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	8,520	8,090	7,975	10,685	13,175	10,005	8,885	67,335
2021	9,185	8,380	8,290	11,640	14,380	10,535	8,945	71,395
2026	10,015	8,850	9,015	12,935	15,665	11,640	10,200	78,350
2031	10,860	9,310	9,770	14,225	16,980	12,850	11,470	85,505
2036	11,705	9,780	10,525	15,545	18,315	14,100	12,785	92,785
2041	12,545	10,245	11,285	16,880	19,660	15,370	14,140	100,165
2046	13,330	10,690	12,005	18,170	20,935	16,580	15,460	107,215
2051	14,105	11,145	12,715	19,500	22,220	17,785	16,815	114,325
2021-2031	1,675	930	1,480	2,585	2,600	2,315	2,525	14,110
2021-2041	3,360	1,865	2,995	5,240	5,280	4,835	5,195	28,770
2021-2051	4,920	2,765	4,425	7,860	7,840	7,250	7,870	42,930

Figure ES-12
Essex County
Employment Forecast by Area Municipality
High Scenario, 2021 to 2051

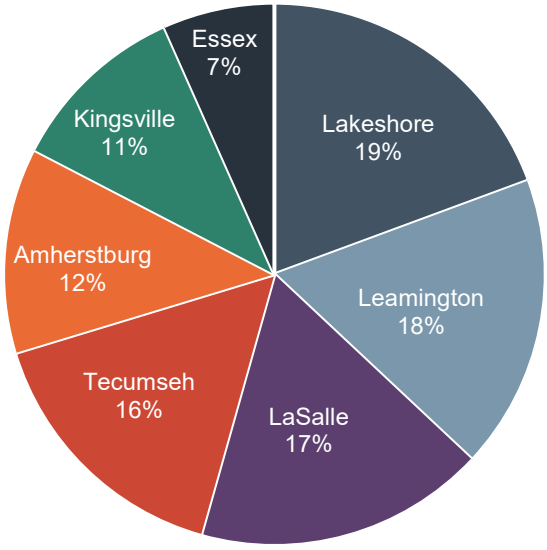
Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	5,600	6,700	7,500	6,500	13,900	12,500	15,400	68,000
2021	5,800	6,800	7,400	6,700	14,300	15,200	16,200	72,300
2026	6,500	7,600	8,300	7,700	16,300	17,600	17,500	81,600
2031	7,300	8,500	9,300	8,900	18,600	20,200	19,000	91,700
2036	8,100	9,300	10,300	10,000	20,800	22,600	20,400	101,500
2041	8,900	10,000	11,100	11,100	22,800	24,900	21,700	110,400
2046	9,500	10,500	11,800	11,900	24,500	26,300	22,800	117,400
2051	10,000	11,100	12,400	12,800	26,200	27,700	24,000	124,200
2021-2031	1,500	1,700	1,900	2,200	4,300	5,000	2,800	19,400
2021-2041	3,100	3,200	3,700	4,400	8,500	9,700	5,500	38,100
2021-2051	4,200	4,300	5,000	6,100	11,900	12,500	7,800	51,900

Figure ES-13
Essex County
Percentage Share of Population Growth by Local Municipality
Medium Scenario, 2021 to 2051

Local Municipality	2021 County Population (%)	Percent of 2021-2051 County Population Growth	2051 County Population (%)
Amherstburg	12%	12%	12%
Essex	11%	7%	10%
Kingsville	11%	11%	11%
LaSalle	17%	17%	17%
Lakeshore	21%	19%	20%
Leamington	15%	18%	16%
Tecumseh	12%	16%	13%
Essex County	**100%**	**100%**	**100%**

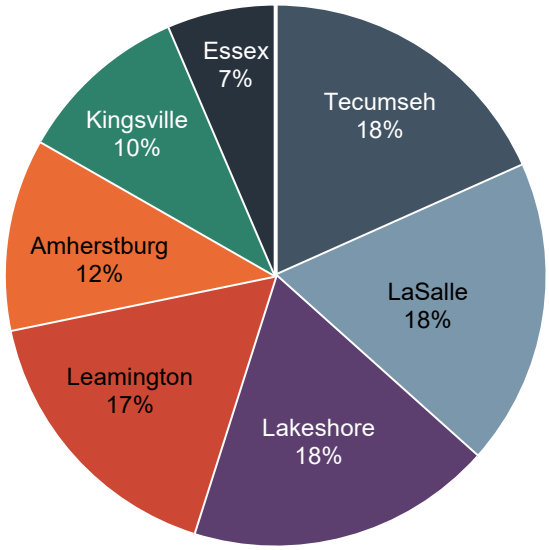
Note: Figures may not add precisely due to rounding.
Source: 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure ES-14
Essex County
Share of Population Growth by Local Municipality, Medium Scenario, 2021 to 2051

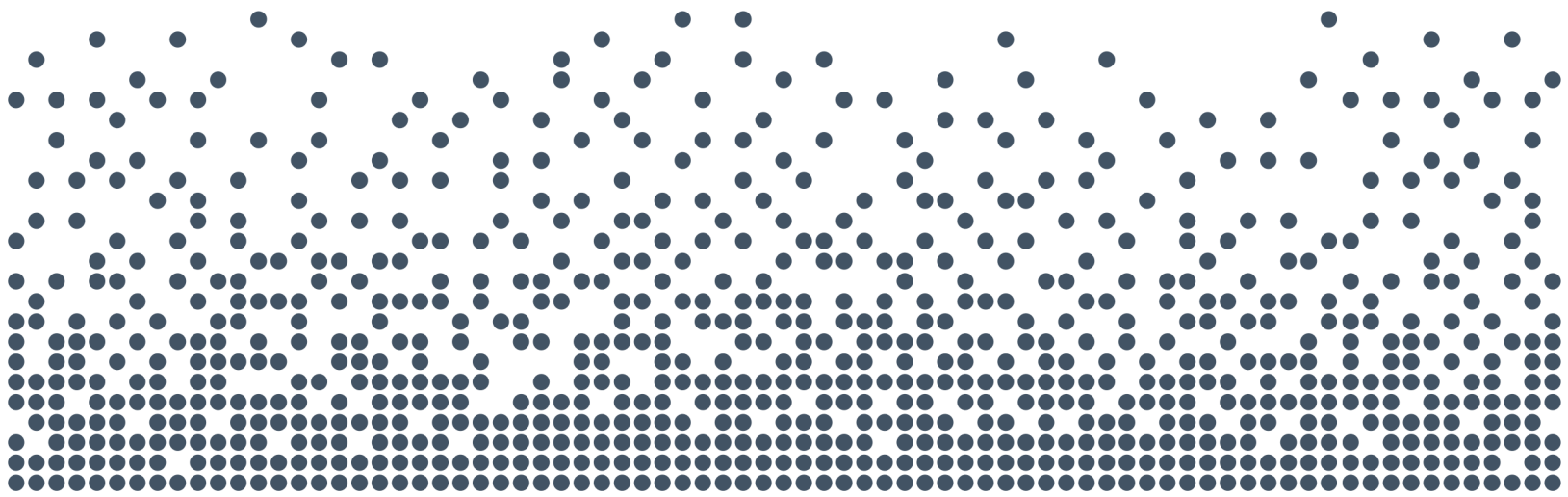


Source: Forecast by Watson & Associates Economists Ltd.

Figure ES-15
Essex County
Share of Household Growth by Local Municipality, Medium Scenario, 2021 to 2051



Source: Forecast by Watson & Associates Economists Ltd.



Report

Chapter 1
Introduction

1. Introduction

1.1 Terms of Reference

As part of its County Official Plan (O.P.) review exercise, Essex County is embarking on a Comprehensive Review (C.R.). The County's C.R. process is being carried through a phased approach. This study represents one component of the Phase 1 work that is being completed as part of this Official Plan Review (O.P.R.).

The Growth Analysis work that is presented in this Report is based on recent development trends, available Census data, and other new relevant information available since the release of the previous population projections report.[1] Through Phase 2 of the C.R., the County will assess its long-term urban land needs and O.P. policies in accordance with the results of this Phase 1 analysis. More broadly, the results of this Growth Analysis Background Report are intended to guide decision-making and policy development specifically related to long-term planning and growth management, municipal finance and infrastructure planning for Essex County and its Area Municipalities.

1.2 What is a Comprehensive Review

According to the Provincial Policy Statement (P.P.S.), 2020, a C.R. is defined as an O.P. review or an O.P. Amendment which is initiated by a planning authority, for the purposes of policies 1.1.3.8 (expansion of a settlement area) and/or 1.3.2.4 (conversion of land within Employment Areas). The P.P.S., 2020 identifies that, "In undertaking a comprehensive review the level of detail of the assessment should correspond with the complexity and scale of the settlement boundary or development proposal."[2] This C.R. process forms the basis to establish a long-term vision and planning framework for the County and its Area Municipalities that fosters a sustainable approach to future residential growth and economic development.

[1] Foundation Report: Essex County Official Plan Review. The County of Essex. August 2011.
[2] Provincial Policy Statement, 2020. Under the *Planning Act*. Ministry of Municipal Affairs and Housing. Ontario. p. 41.

1.3 Provincial Policy Statement, 2020

The P.P.S., 2020 provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions "shall be consistent with" the P.P.S., 2020 (*Planning Act*, R.S.O. 1990, c. P. 13 s. 3).

The P.P.S., 2020 came into effect on May 1, 2020.[1] Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land-use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019). Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and reduce barriers and costs to the land-use planning system in order to provide greater predictability.

A significant change in the P.P.S., 2020 regarding housing policy is the provision of a housing option approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (policy 1.4.3). Providing for housing options adds broader considerations related to built form, ownership structure, affordable housing and other housing arrangements. Housing options are defined as:

> "A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses." p. 45

Throughout the P.P.S., 2020, there is strong encouragement to consider the market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it

[1] Provincial Policy Statement, 2020. Under the *Planning Act*. Ontario.

more challenging for municipalities to transition to other types of development forms they have not historically had considerable success in implementing. As such, when discussing the outlook for the real estate market, it is important to discuss both existing conditions as well as the driving factors that are anticipated to encourage and disrupt housing market demand by structure type and built form. Furthermore, while market demand is important when considering long-range land-use planning, this demand must be considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and diversifying an economic base and supporting job creation.

The P.P.S., 2020 also acknowledges the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. It provides details on how municipalities should plan for employment. The P.P.S., 2020 suggests preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The policy further outlines that, during an O.P. review or update, planning authorities assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2).

The results of this Phase 1 Growth Projection work are intended to provide the technical background to inform planning policy direction through the subsequent phases of the County's O.P.R. regarding the long-term management of land and designated settlement areas County-wide.

1.4 County of Essex Official Plan

The County of Essex O.P. (adopted February 19, 2014 and approved by the Province April 28, 2014) is being reviewed as part of this C.R. process as it relates to growth management, long-term population growth potential, future housing needs, long-term employment growth potential and economic opportunity. As previously referenced, the growth forecasts in the County's existing O.P. is based on the Population and Employment Foundations Report completed in August 2011 and presented to County

Council in September 2011.[1] The growth forecasts contained in the 2011 Foundations Report have been reviewed as part of this Phase 1 Growth Analysis Background Report and updated to the year 2051 on a County-wide basis as well as by Area Municipality.

In the Essex County O.P., settlement areas include two components: Primary Urban Settlement Areas and Secondary Settlement Areas. Primary Settlement Areas are the largest and most traditional centres of settlement and commerce in the County. Growth management policies in the O.P. direct the majority of future growth into the Primary Settlement Areas which have full municipal sanitary and water services. Furthermore, policies in the County's O.P. encourage a range of land uses and housing options in the Primary Settlement Areas.[2] Primary Settlement Areas include:

- Amherstburg Urban Area (Town of Amherstburg);
- Essex Centre and Harrow (Town of Essex);
- Kingsville Urban Area (Town of Kingsville);
- Leamington Urban Area (Municipality of Leamington);
- Tecumseh Urban Area, Tecumseh Hamlet, Oldcastle Hamlet (Employment Area) and Village of St. Clair Beach (Town of Tecumseh);
- LaSalle Urban Area (Town of LaSalle); and
- Maidstone/Belle River Urban Area and Wallace Woods (Municipality of Lakeshore).

Secondary Settlement areas comprise smaller hamlet, village, employment-based or other site-specific settlements that have been identified in the local official plans and carried forward in the County of Essex O.P.. According to policies in the County's O.P, new development with the Secondary Settlement Area is generally limited to infilling, redevelopment on existing lots of records, and limited residential intensification.[3] Most Secondary Settlement Areas in the County are residential in nature, such as the shoreline areas in the Town of Essex, the Town of Kingsville and the Municipality of Leamington. Secondary Settlement Areas that contain a mixture of uses include the

[1] Foundation Report: Essex County Official Plan Review prepared by N. Barry Lyon Consultants Ltd., August 2011.
[2] County of Essex O.P., policy 3.3.1, p. 40.
[3] County of Essex O.P., policy 3.2.5., p. 42.

Hamlet of Cottam in the Town of Kingsville and the Hamlet of McGregor in the Towns of Amherstburg and Essex. The County has several employment-based Secondary Settlement Areas, such as the Smith Industrial Park in the Town of Amherstburg, and Ruthven in the Town of Kingsville.[1] Recognizing the diversity of Secondary Settlement Areas, the County's O.P. directs local municipalities to establish a hierarchy of Secondary Settlement Areas.

Key growth management policies in the County's O.P. include the following:

- Population and employment growth is primarily directed to Primary Settlement Areas that offer opportunities to build complete communities;
- Local municipalities are to achieve an affordable housing target of 20% for all new housing development within the municipality;
- Local municipal O.P.s establish appropriate land uses within the Primary Settlement Areas;
- Residential intensification is mainly directed to Primary Settlement Areas, and to a lesser extent, within full serviced Secondary Settlement Areas; and
- Urban boundary expansions are only permitted for Primary Settlement Areas.

Phase 2 of the County's C.R. will provide further direction regarding growth allocations by Area Municipality by Primary Settlement Area as well as associated urban land needs over a 25-year planning horizon in accordance with the requirements of the P.P.S., 2020.

1.5 What Drives Long-Term Population and Employment Growth

A broad range of considerations related to demographics, economics and socio-economics are anticipated to impact future population and employment growth trends throughout Essex County over the 2021 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the built-form, urban density, and location of residential and non-residential development.

[1] County of Essex O.P., p. 42.

As a starting point, it is important to recognize that future population and employment growth within Essex County is highly correlated with the growth outlook and competitiveness of the broader regional economy (i.e., commuter-shed). This is discussed in further detail in Chapter 5. The employment base within Essex County and the surrounding commuter-shed can be grouped into two broad categories: export-based sectors and community-based sectors. The latter primarily refers to local population serving employment. Export-based sectors comprise industries (i.e., economic clusters) producing goods that reach markets outside the community, such as agriculture and primary resources, manufacturing, research and development, as well as other knowledge-based industries.

Economic growth in the regional export-based economy generates wealth and economic opportunities which, in turn, stimulates community-based or population-related employment sectors, including retail trade, accommodation and food, and other service sectors. Economic development subsequently drives the need for labour force growth, which is largely generated from positive net migration. Ultimately, population growth in Essex County within the 0-64 age group, similar to the Country as a whole, will continue to be largely driven by net migration associated with the working-age population and their dependents (i.e., children, spouses not in the labour force, others). On the other hand, growth of the County's 65+ population will continue to be largely driven by the aging of Essex's existing population and, to a lesser extent the attractiveness of the County to older adults and seniors through net migration.

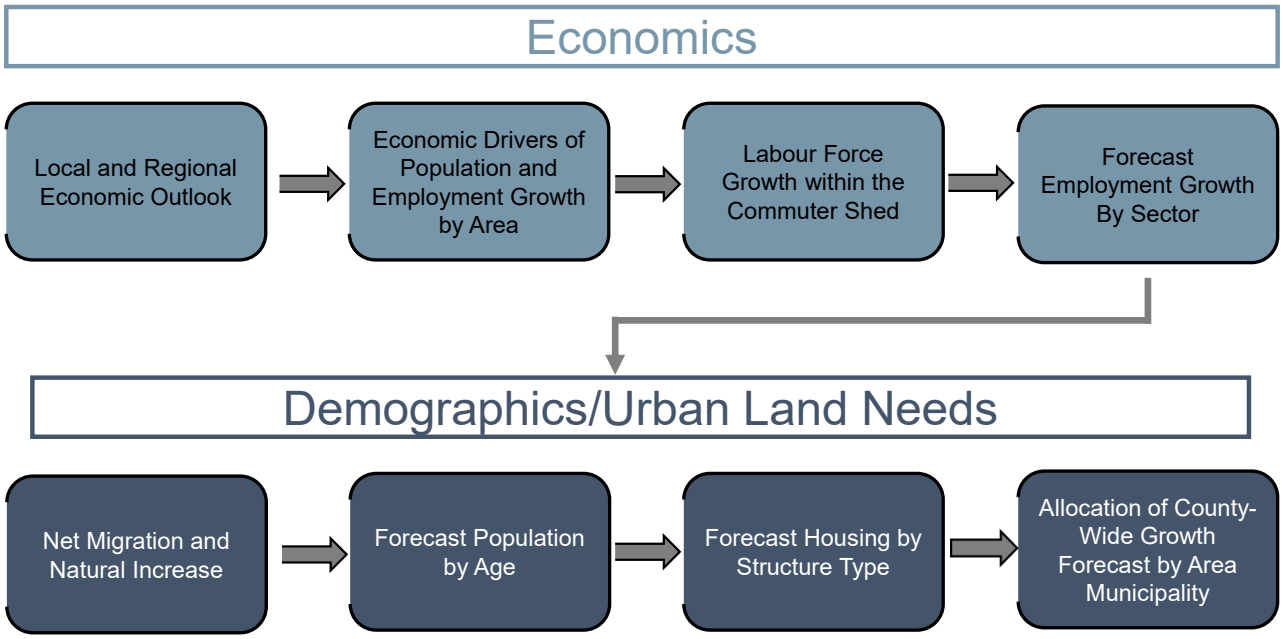
1.6 Approach to Long-Term Population, Housing and Employment Forecast

The population, household and employment forecast methodology adopted for this study utilizes a combined forecasting approach, which incorporates both the traditional "top-down" cohort-survival forecast methodology (i.e., population by age-cohort and components of growth including net migration and natural increase) as well as "bottom-up" housing market and economic considerations by Area Municipality. This combined approach is adopted to ensure that both regional economic/demographic trends and local housing market conditions are adequately assessed in developing the County's long-term growth potential and appropriately allocating future County-wide population and employment growth by Area Municipality.

This forecasting approach has been developed in accordance with the Provincial Projection Methodology Guidelines and industry best practices.[1] It is a provincially accepted approach to projecting employment, population and corresponding total household formation.[2] This approach focuses on the rate of historical housing construction in Essex County and the surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as municipal servicing capacity, housing units in the development approvals process and available urban land supply. The forecasting approach adopted herein also focuses on the demographic, economic and socio-economic factors which are anticipated to influence future housing demand and economic growth across each Area Municipality over the next three decades, which are discussed in greater detail herein in Chapter 5.

Figure 1-1 summarizes the population, housing and employment forecast methodology.

Figure 1-1
Approach to Long-Term Population, Household and Employment Forecast



[1] Projection Methodology Guidelines. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.
[2] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.

1.6.1 Approach to Population and Housing Forecast

The cohort-survival population forecast methodology uses, as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (i.e., in-migration to the municipality, less out-migration, by age group). Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy.

The population and household growth forecast provided herein has been developed from a population forecast by age structure. Total households are generated from the population forecast by major age group based on forecast age-specific headship rates. A household headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e., cohort).[1]

An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age, family type and family structure. Total headship rates do not tend to fluctuate significantly over time; however, the ratio of household maintainers per capita tends to vary by population age group. For example, a municipality with a higher percentage of seniors, such as Essex County, will typically have a higher household maintainer ratio per capita (i.e., headship rate) compared to a municipality with a younger population. This is because households occupied by seniors typically have fewer children than households occupied by adults under 65 years of age. Accordingly, forecast trends in population age structure provide important insights into future average household occupancy trends or average persons per unit (P.P.U.). Over the next 30 years, average P.P.U. levels across the County are anticipated to decline, largely driven by the aging of the County's population base.

Forecast housing demand by structure type has been determined based on a review of recent trends in housing demand (i.e., propensity) by population age group. In addition to population age structure, there are a number of factors such as household income, housing affordability, types of housing in active development applications, lifestyle

[1] It is noted that each household is represented by one primary household maintainer.

decisions, health, mobility, and planning policy, that also influence the anticipated form and type of housing units constructed across Essex County.

A total of three long-term population and housing growth scenarios have been allocated by Area Municipality based on a review of local supply and demand factors that are anticipated to influence the location of residential development over the long-term planning horizon, which is further discussed in Chapter 5.

1.6.2 Approach to Employment Forecast

When forecasting long-term employment, it is important to understand how growth in the municipality's major employment categories (i.e., industrial, commercial and institutional) is impacted by forecast labour force and population growth. Population-related employment (i.e., retail, schools, service and commercial) is generally automatically attracted to locations convenient to residents. Typically, as the population grows, the demand for population-related employment also increases to service the needs of the local community. Forecast commercial and institutional activity rates (i.e., ratio of jobs to population) have been based on historical activity rates and employment trends, as well as future commercial and institutional employment prospects within a local and regional context. Similar to population-related employment, home-based employment is also anticipated to generally increase in proportion to population growth.[1]

Industrial and office commercial employment (i.e., export-based employment), on the other hand, is not closely linked to population growth and tends to be more influenced by broader market conditions such as economic competitiveness, transportation connectivity, access to labour, and distance to employment markets. In addition, this type of employment is often influenced by local site characteristics such as servicing capacity, highway access and exposure, site size/configuration, physical conditions and site location within existing and future Employment Areas. As such, industrial employment (i.e., employment lands employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

[1] Due to further advancements in telecommunications technology, it is anticipated that home-based employment activity rates will continue to increase over the forecast period across the County.

- Historical employment trends (i.e., review of established and emerging employment clusters), non-residential construction activity;
- Availability of industrial land supply and future planned greenfield development opportunities on vacant designated employment lands within Essex County and the surrounding market area;
- Recent trends in industrial land prices within Essex County, the City of Windsor and competing employment markets within southwestern Ontario;
- Discussions with Invest WindsorEssex, Essex County and each of the County's Area Municipalities regarding potential near-term and longer-term economic development opportunities throughout the Windsor-Essex Area (refer to Chapter 5);[1] and
- Macro-economic trends regarding the nature of work which are anticipated to influence long-term employment growth potential across the County by sector and by land use category.

A total of three long-term employment scenarios have been allocated by Area Municipality based on a review of local supply and demand factors that are anticipated to influence the location of non-residential development over the long-term planning horizon, which is further discussed in Chapter 5.

[1] https://www.investwindsoressex.com/

Chapter 2
Overview of the Macro-Economic Outlook and Regional Employment Trends

2. Overview of the Macro-Economic Outlook and Regional Employment Trends

This chapter summarizes the national, provincial and regional economic trends that are anticipated to continue to influence the population and employment growth outlook for Essex County over the next three decades.

2.1 Near-Term Impacts of COVID-19

2.1.1 Near-Term Economic Impacts

Since being declared a pandemic by the World Health Organization (W.H.O.) on March 12, 2020, the economic impacts of coronavirus disease (COVID-19) on global economic output have been significant. Economic sectors such as travel and tourism, accommodation and food, manufacturing, and energy were hit particularly hard by COVID-19 social-distancing measures. On the other hand, many employment sectors, particularly knowledge-based sectors, that have been more adaptable to the current remote work environment and evolving hybrid work-from-home/work-at-office environment have been less negatively impacted, and in some cases have prospered. Furthermore, required modifications to social behavior (i.e., physical distancing) and increased work-at-home requirements resulting from government-induced containment measures and increased health risks have resulted in significant economic disruption, largely related to changes in consumer demand and consumption patterns. Lastly, escalating tensions and constraints related to international trade have also begun to raise questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains. This has been further exacerbated with the geopolitical unrest that has arisen due to the 2022 Russian invasion of Ukraine.

Currently, the level of sustained economic impact related to the “exogenous shock” to the global and Canadian economies resulting from the COVID-19 pandemic is still somewhat uncertain. As policy responses and vaccine efforts have been rolled out to pave the road for economic recovery, the rapid spread and threat of new variants have increased the uncertainty as to when the pandemic can be overcome. Notwithstanding this uncertainty, the global and national economies are on a path towards recovery, but it is generally clear that the longer the COVID-19 pandemic persists on an international scale, the longer the global recovery will take.

For many Ontario municipalities, including Essex County, the COVID-19 pandemic has been a significant driver of ownership housing demand, largely led by the ultra-low interest rate environment generated throughout 2020 and 2021 in response to the pandemic, combined with steady outward growth pressure during this period particularly from the larger urban centres of the Greater Toronto Hamilton Area (G.T.H.A). It is recognized, however, that the longer-term population and employment growth potential for the County will be heavily dependent on the sustained economic growth potential of the Windsor-Essex Area and surrounding economy. As such, it is important not to overstate the recent impacts of COVID-19 on housing demand in Essex County over the long term.

Looking ahead over the next several months, there are growing macro-economic headwinds of which to be aware that are influencing economic conditions within the Essex-Windsor Area economy. Most notably, persistently high global and national inflation levels have required an aggressive response by central banks to tighten monetary conditions through sharp increases in interest rates and quantitative tightening. It is noted that as of August 2022, Canada's inflation rate reached 7.6%, a level not seen since 1983.[1] Current measures by central banks are anticipated to continue to cool economic output and consumer demand; however, on-going trade disruptions, geo-political conflict and tight labour conditions continue to aggravate global supply shortages of goods and services. In turn, this limits the ability of tighter monetary conditions to ease rising inflationary pressures.

Rising public-sector debt due to pandemic response measures and increasing household debt loads resulting from sharp housing price appreciation in many areas of Canada, most notably the Country's largest urban centres, is also a concern. While the national housing market is now starting to show cooling signs as a result of higher mortgage rates, rising borrowing costs, fuel costs and upward pressures on rents are further exacerbating challenges associated with declining housing affordability through increases in monthly households carrying costs. These impacts, combined with the broader inflationary concerns outlined, are increasingly likely to result in potential near-term setbacks in the recovery path towards stable national and provincial economies. Despite these consequences of COVID-19 and the near-term economic headwinds discussed above, the long-term economic and housing outlook for southwestern Ontario

[1] Canada Inflation Rate (CPI) - July 2022 Update | WOWA.ca

remains positive as the region continues to be attractive to international investment and newcomers alike.

2.1.2 COVID-19 and the Changing Nature of Work

In addition to its broader impacts on the economy, COVID-19 is also accelerating changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks (V.P.N.s), virtual meetings, cloud technology and other remote work collaboration tools. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional and industrial real estate space needs.

As of 2021, it is estimated that approximately 8% of Essex County's workforce is working from home on a full-time basis, up from 7% in 2016. The percentage of workers who reported having no fixed place of work (N.F.P.O.W.) was approximately 12% in 2021, remaining relatively stable compared to 2016.[1] [2] Current initiatives such as SWIFT (Southwestern Integrated Fibre Technology) have resulted in an investment of $268 million to bring high-speed broadband networks across southwestern Ontario. SWIFT is a non-profit regional broadband project whose goal is to bring high-speed broadband networks across southwestern Ontario. Through partnership with federal, provincial and private-sector investors, SWIFT aims to connect 30% of southwestern Ontario's underserved areas.[3] Of the $268 million in total funding, $19 million has

[1] Work at home and N.F.P.O.W. employment derived from 2001 and 2016 Statistics Canada Census data.
[2] Statistics Canada defines N.F.P.O.W. employees 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."
[3] SWIFT Project to Expand High-Speed Internet Access to More than 63,000 Homes, Businesses, County of Essex News, June 24, 2021.

been committed to providing high-speed internet access to 5,170 households and businesses in Essex County.[1]

It is anticipated that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will steadily increase over the long-term across Essex County driven by continued growth in knowledge-based employment sectors and continued technological advancement. As the percentage of work at home and off-site employment continues to steadily rise, it may reduce the relative need for future commercial office, retail and institutional building space, which will be reviewed in further detail in Phase 2 of this study.

2.1.3 Immigration Levels for Canada – New Targets

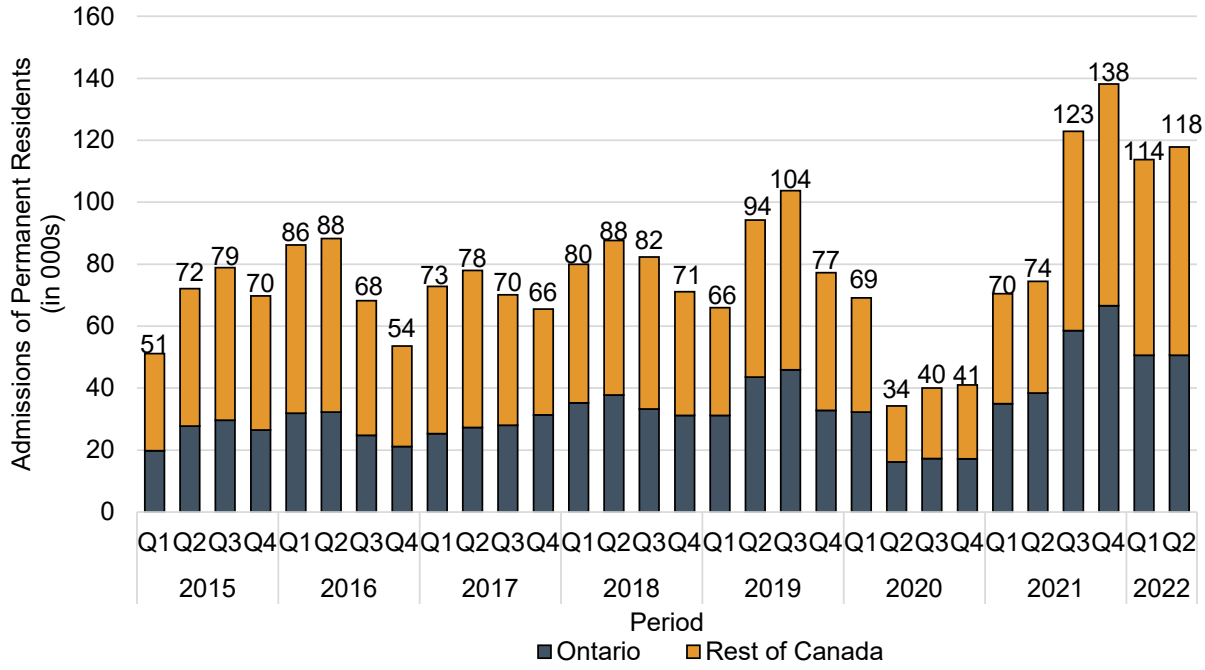
In February 2022, the Canadian federal government released its Immigration Levels Plan for the next three years. Canada has continued to raise their immigration targets and aims to welcome 431,645 new permanent residents in 2022, 447,055 in 2023, and 451,000 in 2024. This is an increase of 23,350 newcomers annually from the previous targets of 411,000 in 2022 and 421,000 in 2023. The increase in immigration targets will make up for the shortfall in 2020 and fill crucial labour market gaps to ensure Canada remains competitive on the world stage. With a focus on economic growth, 60% of admissions are to come from the economic class. [2] [3]

Figure 2-1 summarizes admissions to Canada and Ontario by quarter since 2015. Throughout 2020 and the first half of 2021 national and provincial immigration levels sharply declined due to COVID-19. Immigration in the second half of 2021 rebounded strongly, resulting in 405,000 permanent residents admitted to Canada in 2021, while roughly half the total national immigration was accommodated in the Province of Ontario last year. Looking forward through 2022 and beyond, immigration levels to Canada and

[1] SWIFT Broadband Expansion Plan Underway in Essex County. County of Essex News, May 7, 2021.
[2] https://www.canada.ca/en/immigration-refugees-citizenship/news/notices/supplementary-immigration-levels-2022-2024.html
[3] Immigration, Refugee and Citizenship Canada news release, October 20, 2020. https://www.canada.ca/en/immigration-refugees-citizenship/news/2020/10/government-of-canada-announces-plan-to-support-economic-recovery-through-immigration.html

Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

Figure 2-1: Quarterly Admission of Permanent Residents in Ontario Versus the Rest of Canada, 2015 to Q2 2022



Source: Derived from IRCC, August 17, 2022, data, by Watson & Associates Economists Ltd.

2.2 Planning within the Context of an Evolving National and Provincial Economy

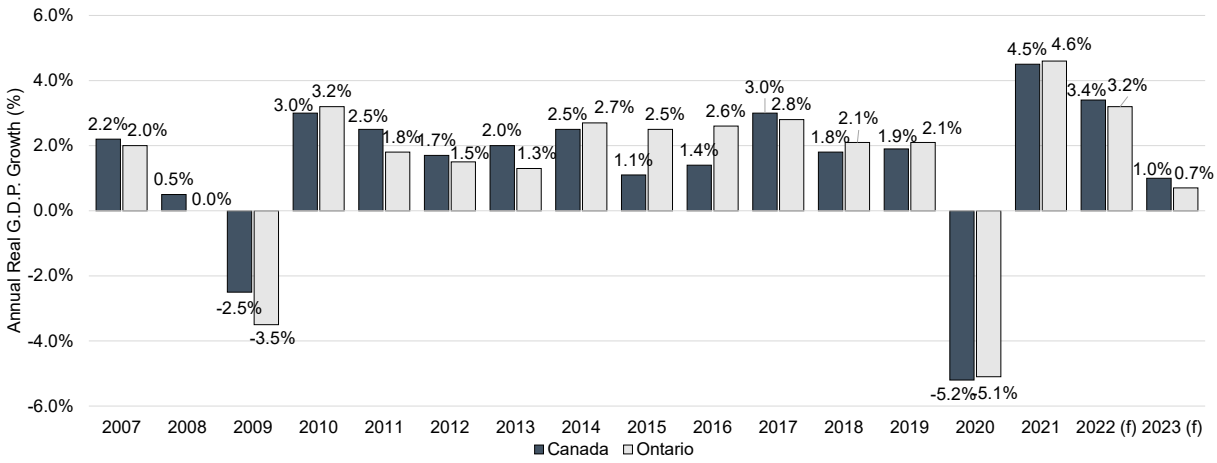
2.2.1 Ontario Outlook within the Canadian Context

Similar to the broader Canadian economy, the economic base of Ontario, as measured by gross domestic product (G.D.P.) output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector over the past several decades. This shift has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn. It is noted, however, that these G.D.P. declines in the manufacturing sector have started to show signs of stabilization over the past few years, both prior to the pandemic as well as through the more recent economic recovery.

Over the past decade, the Ontario export-based economy experienced a rebound in economic activity following the 2008/2009 downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding by 2014, as illustrated in Figure 2-2. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar combined with the gradual strengthening of the United States' (U.S.) economy.[1] Provincial G.D.P. growth eased in 2019 to 1.6%, largely as a result of a tightening labour market and slowing global economic growth.[2]

As illustrated in Figure 2-2, the Ontario economy contracted by 5.1% in 2020 before rebounding by 4.6% in 2021. BMO Capital Markets has forecast that the Ontario economy will continue its momentum through 2022 growing by 3.2%, while the overall Canadian economy is expected to grow by 3.4% in 2022. Economic growth in Ontario is forecast to moderate to 0.7% in 2023 and 1.0% for Canada.

Figure 2-2
Province of Ontario and Canada
Annual Real G.D.P. Growth, Historical (2006 to 2020) and Forecast (2021 to 2023)



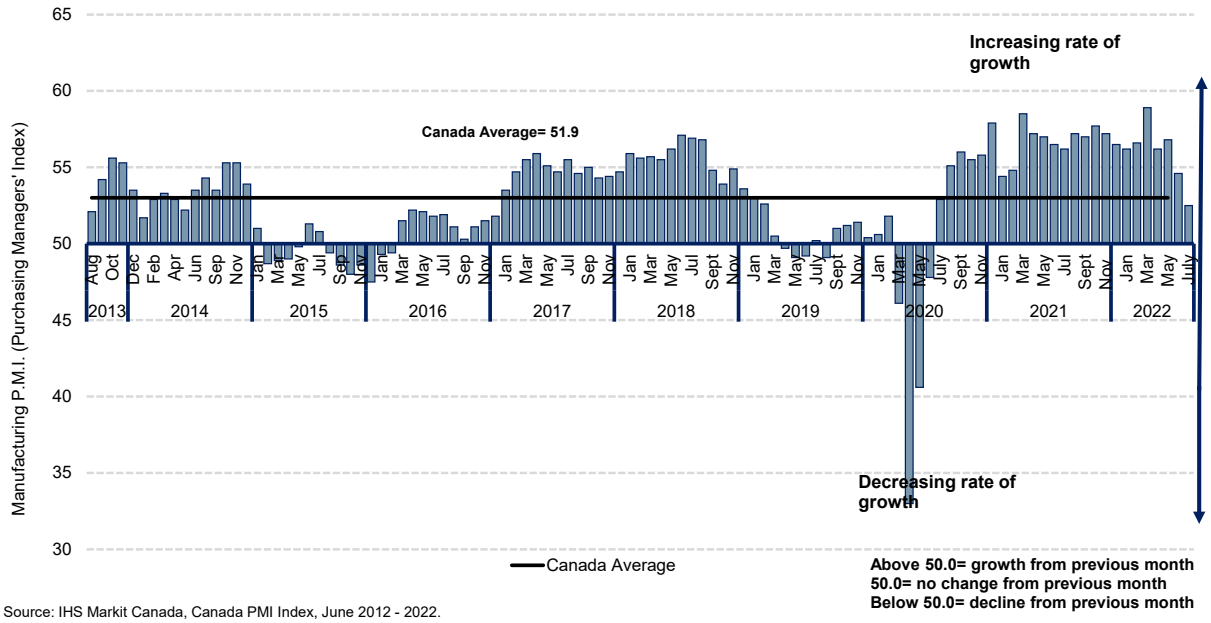
Note: 2021 (Ontario), 2022 and 2023 are forecast by BMO Capital Markets Economics.
Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, August 26, 2022, by Watson & Associates Economists Ltd., 2022.

[1] Valued at approximately $0.76 U.S. as of September 2, 2022.
[2] Provincial Economic Outlook, BMO Capital Markets, January 7, 2022.

2.2.2 Outlook for National and Provincial Manufacturing Sector

The Purchasing Managers' Index (P.M.I.) is a prevailing economic indicator for economic trends in the manufacturing and services sectors which is based on the purchasing managers' market condition outlook and serves as a key measure of the direction of the manufacturing sector on a monthly basis. The P.M.I. index ranges between a number of 1 to 100. A P.M.I. value greater than 50 represents an expansion relative to the previous month, while a P.M.I. value less than 50 represents a contraction. Figure 2-3 summarizes the P.M.I. index for Canada between 2013 and 2022 (April). As illustrated in Figure 2-3, the P.M.I. index largely indicated moderate to strong expansion between 2013 and 2022, with the exception of 2015, 2019 and 2020 where the index showed sustained monthly contractions. The P.M.I. index presents steep contractions at the beginning of March 2020 in manufacturing due to the negative effects of COVID-19 on the global economy, international trade, and the general demand for goods and services. These conditions worsened into April 2020; however, they showed signs of a strong rebound by July 2020 before moderating by July 2022.

Figure 2-3
Purchasing Managers' Index for Canada, 2001 to July 2022



Source: IHS Markit Canada, Canada PMI Index, June 2012 - 2022.

Note: Above 50.0 indicates growth from the previous month, 50.0 indicates no change from the previous month, and values below 50.0 indicate a decline from the previous month.
Source: HIS Markit Canada, Canada PMI Index, June 2012 to July 2022 summarized by Watson & Associates Economists Ltd., 2022.

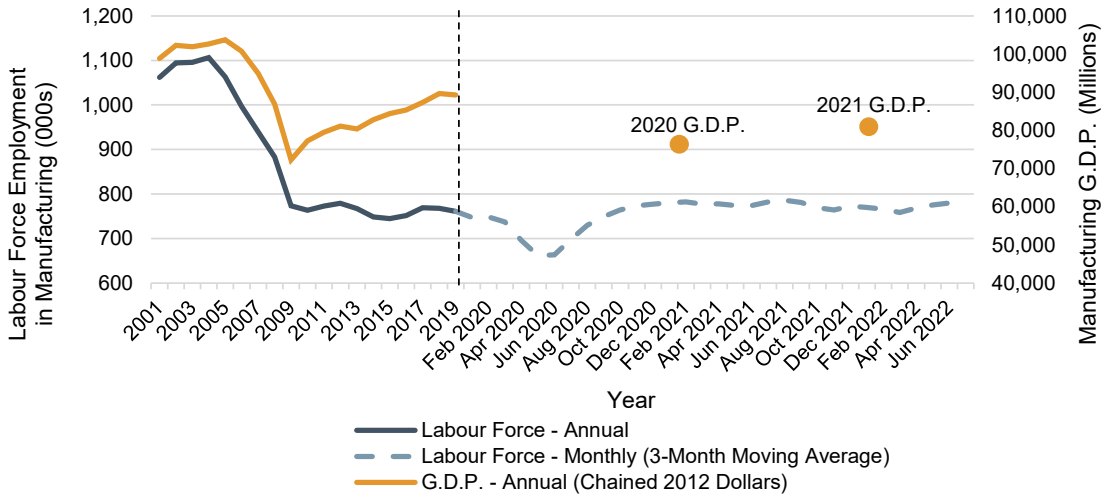
As summarized in Figure 2-4, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009 with respect to labour force and G.D.P. Between 2009 and 2019, however, provincial labour force levels in the manufacturing sector stabilized, while G.D.P. output steadily increased. Since stabilizing in 2010, labour force levels in the manufacturing sector have remained relatively steady except for the mid-2020 decline and sharp recovery following the onset of COVID-19.

While manufacturing remains vitally important to the provincial and regional economies with respect to jobs and economic output, this sector is not anticipated to represent a high employment growth sector at the provincial level. Notwithstanding this trend at the provincial level, within Essex County the manufacturing sector has experienced a relatively strong recovery over the past decade (refer to section 2.4).

While there will continue to be a manufacturing focus in Ontario, the nature of industrial processes is rapidly shifting, becoming more capital/technology intensive and

automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive. As a result of increased technological efficiencies in the manufacturing sector, provincial G.D.P. levels related to the manufacturing sector have moderately increased over the past decade compared to generally flat labour force trends, indicating increasing G.D.P. output per employee.

Figure 2-4
Manufacturing Labour Force Trends in Ontario, 2001 to July 2022



Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, 2020 monthly data from Table 14-10-0091-01, and 2021 monthly data from Table 14-10-0388-01. Annual G.D.P. data from Statistics Canada Table 36-10-0402-01, by Watson & Associates Economists Ltd.

2.3 Regional and Local Labour Force Trends

2.3.1 Broader Regional Economic Outlook, 2001 to 2021

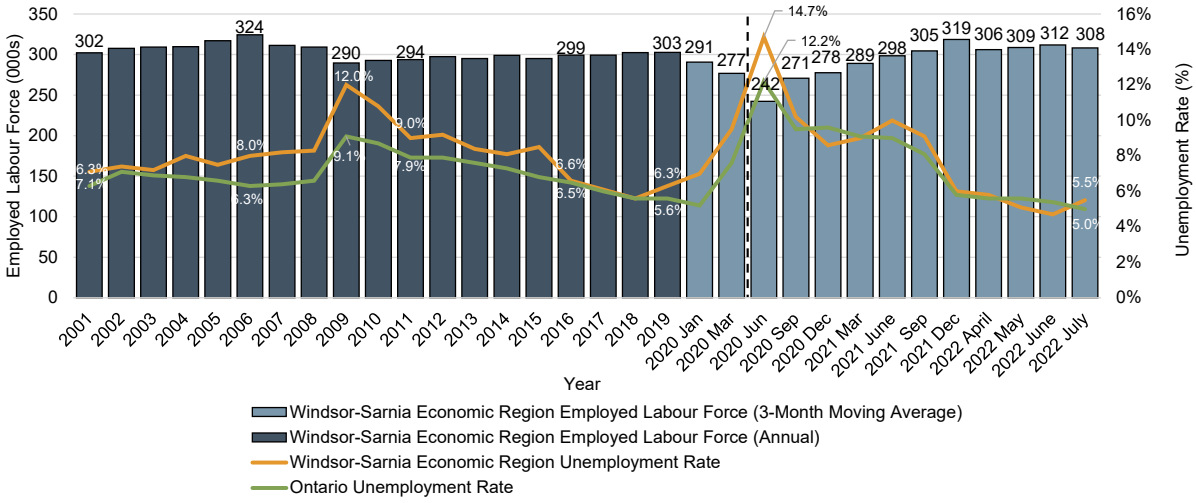
Figure 2-5 illustrates total labour force and unemployment rate trends for the Windsor-Sarnia Economic Region, including the City of Windsor, the Lambton County Census Division and the Chatham-Kent Census Division.[1] Labour force data represents the number of residents who live in the Windsor-Sarnia Economic Region and are in the

[1] Based on the levels of geography for which the data on labour force and employment rate trends is maintained, Economic Region level data is the closest regional data available for Essex County.

labour force, regardless of where they work. This includes residents who live and work in the Windsor-Sarnia Economic Region, including those who work from home, and those who commute outside the region for work. Key observations include:

- The unemployment rate in the Windsor-Sarnia Economic Region rose sharply to 12% in 2009, coinciding with the 2008 global economic recession, and subsequently fell to 6.3% in 2019, the lowest rate this area has experienced in over two decades, prior to peaking in June 2020 to 14.7% as a result of COVID-19.
- Given the high concentration of manufacturing industries and industries that support the manufacturing sector within the Windsor-Sarnia Economic Region, the economy in this region of Ontario was hit particularly hard during the 2008/2009 global economic downturn. As such, the unemployment rate within the Windsor-Sarnia Economic Region rose higher and more sharply in 2009 relative to the provincial average. A similar trend was also observed during the economic downturn of mid-2020.
- Since June 2020, the labour force base of the economic region has steadily increased to levels well above pre-pandemic highs reached in 2019;
- Coinciding with recent labour force growth, the unemployment rate in the broader Windsor-Sarnia Economic Region has recently declined to historical lows that have not been reached within the past two decades.
- The total labour force within the Windsor-Sarnia Economic Region remained relatively flat between 2001 and 2021, from 302,000 to 302,600.
- To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by municipalities within the Windsor-Sarnia Economic Region, including those in Essex County, to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the economic region within a broad range of housing options.

Figure 2-5
Windsor-Sarnia Economic Region
Total Labour Force and Unemployment Rate Trends, 2001 to 2022



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
Source: Windsor-Sarnia Economic Region employed labour force and unemployment rate from Statistics Canada Table 14-10-0090-01 and 2020 monthly data from Table 14-10-0293-01. Annual Province of Ontario unemployment rate from Statistics Canada Table 14-10-0090-01 and 2020 monthly data from Table 14-10-0295-02. 2021 and 2022 monthly data from Table 14-10-0387-02.
By Watson & Associates Economists Ltd.

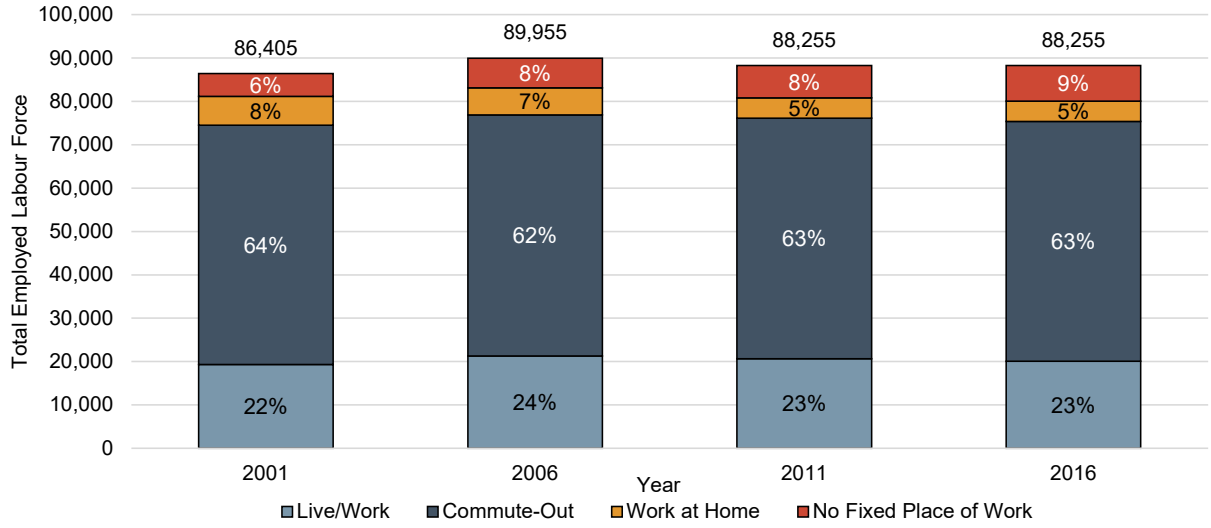
2.3.2 Local Labour Force Trends

The availability of a local skilled labour force is an increasingly important consideration, particularly within the context of an evolving economy that is increasingly driven by economic growth in knowledge-based sectors. Having a labour force that meets the needs and demands of business is essential to the municipal competitiveness of a municipality and the ability to attract industry and employment growth.

As illustrated in Figure 2-6, the Essex County labour force has a high concentration of those who commute out of Essex County for employment, in addition to having a significant share of those who live and work within the County. As of 2016, approximately 22% of Essex County's employed labour force live and work in the County or work from home, and 63% commute out of the County for work.[1] Over the 2001 to 2016 period, the share of work at home labour force declined marginally, with N.F.P.O.W. labour displaying the largest percentage increase.

[1] Note 2021 Statistics Canada data is not available until November 2022.

Figure 2-6
Essex County
Employed Labour Force by Place of Work, 2001 to 2016



Note: 2011 is an estimate.
Source: Statistics Canada Census, 2001 to 2016, derived by Watson & Associates Economists Ltd., 2022.

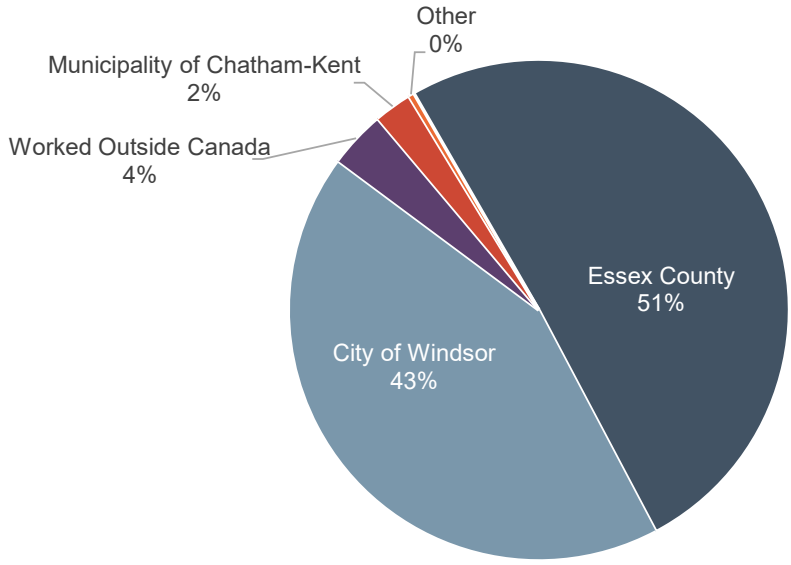
2.3.3 Commuting Trends

Figure 2-7 summarizes where Essex County residents with a usual place of work commute to work, while Figure 2-8 identifies from where people employed with a usual place of work in the County commute, based on 2016 Census data.[1] Key observations include:

- Live/work employment within Essex County is relatively high (51%); however, a significant percentage of residents are out-commuters (49%); and
- The City of Windsor accounted for the largest component of the Essex County commuter-shed, comprising 43% of total out-commuters. The City of Windsor also provides the largest share of in-commuters to Essex County relative to other surrounding municipalities. This emphasizes the relatively close economic and socio-economic interaction between the City and County.

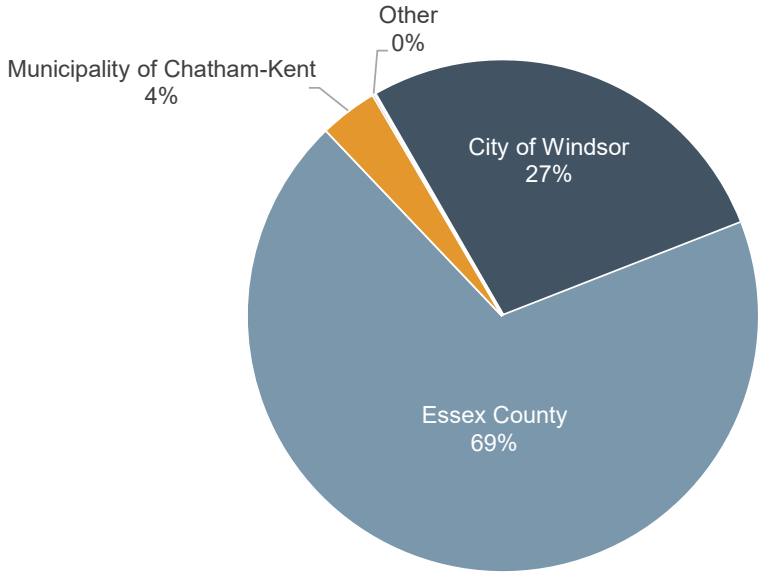
[1] It is noted that employment and commuting trends associated with the 2021 Census will not be available until November 2021.

Figure 2-7
Destination Essex County Employed Residents Travel to for Work, 2016



Source: Derived from Statistics Canada 2016 Census data, by Watson & Associates Economists Ltd.

Figure 2-8
Location from which Essex County Employees Commute for Work, 2016



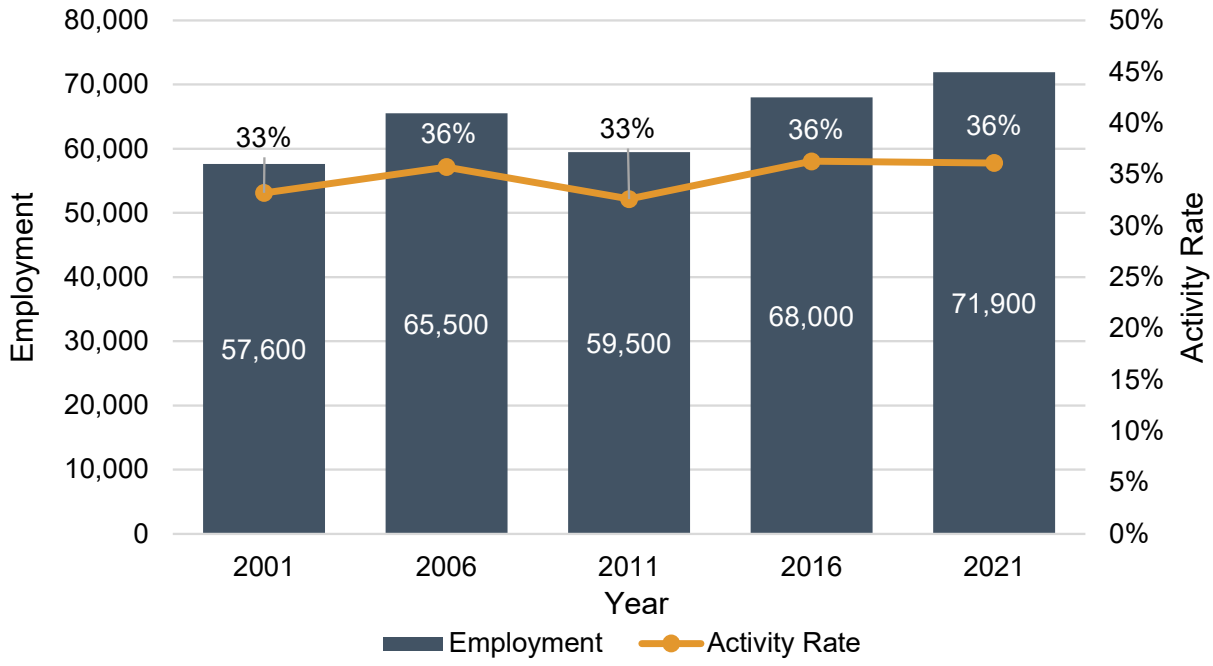
Source: Derived from Statistics Canada 2016 Census data, by Watson & Associates Economists Ltd.

2.4 Overview of Essex County Economic Trends

2.4.1 Recent Employment Growth Trends by Sector

Figure 2-9 summarizes total employment growth in Essex County between 2001 and 2021. This includes the live/work labour force, including work at home employees as well as in-commuters. During this time period, the County experienced an increase of approximately 14,300 jobs. The County's employment activity rate increased modestly from 33% in 2001 to approximately 36% in 2021, indicating that the local employment base has been increasing at a faster rate than the population.[1] Comparatively, the activity rate for the City of Windsor in 2001 was 47%, before declining to 46% in 2016.

Figure 2-9
Essex County
Employment Growth, 2001 to 2021



Source: 2001 to 2016 derived from Statistics Canada Census data, and 2021 derived by Watson & Associates Economists Ltd.

[1] An employment activity rate is defined as the number of local jobs in a municipality divided by resident population.

Figure 2-10 and 2-11 summarizes the employment share by sector in 2001 and 2021, representing the number of jobs located within the Essex County. The County employment base is diverse, spanning a range of employment sectors from manufacturing, construction, accommodation and food services, public administration, and professional, scientific and technical services to transportation and warehousing. The largest employment sector in the County in 2001 and 2021 was manufacturing, accounting for a large, but declining, share of the total employment base at 33% and 30%, respectively. Comparatively, manufacturing is also the largest sector in the City of Windsor, but accounts for less of the total employment base at 17% in 2021. Windsor also has a larger proportion of its employment base in institutional sectors, with health care and social assistance and educational services accounting for 15% and 9%, respectively.

Figure 2-10
Essex County
Estimated Employment Share by Sector, 2001

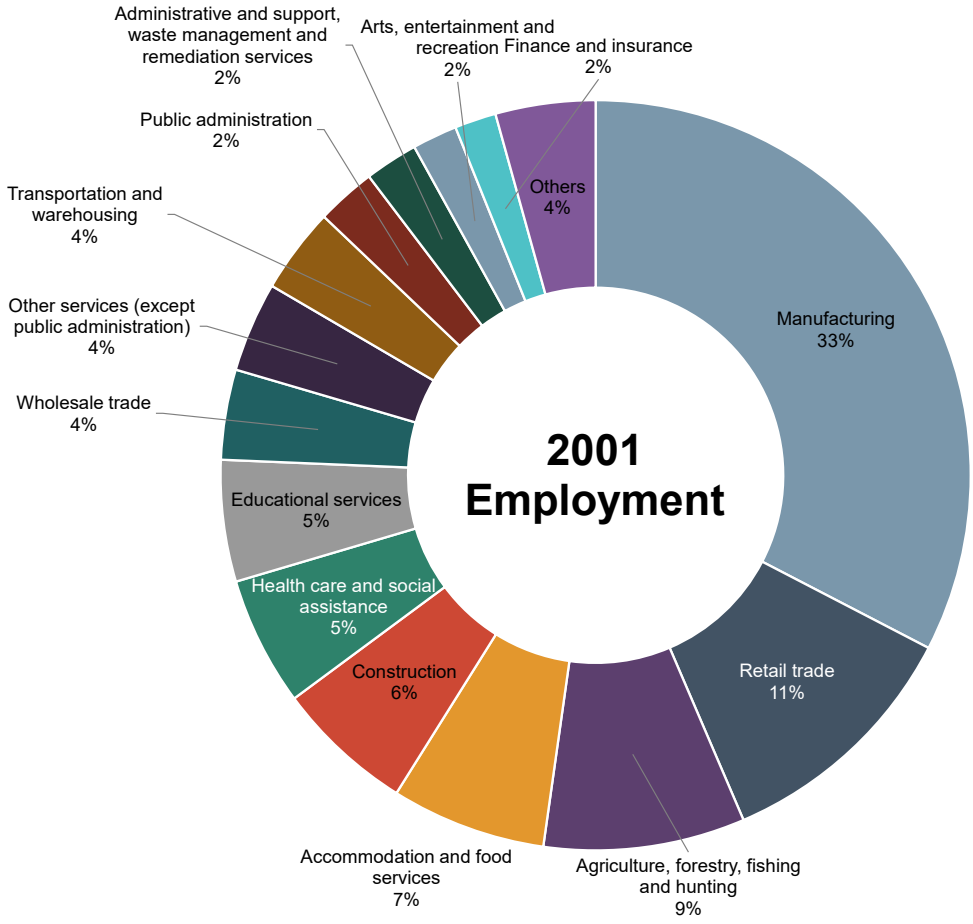
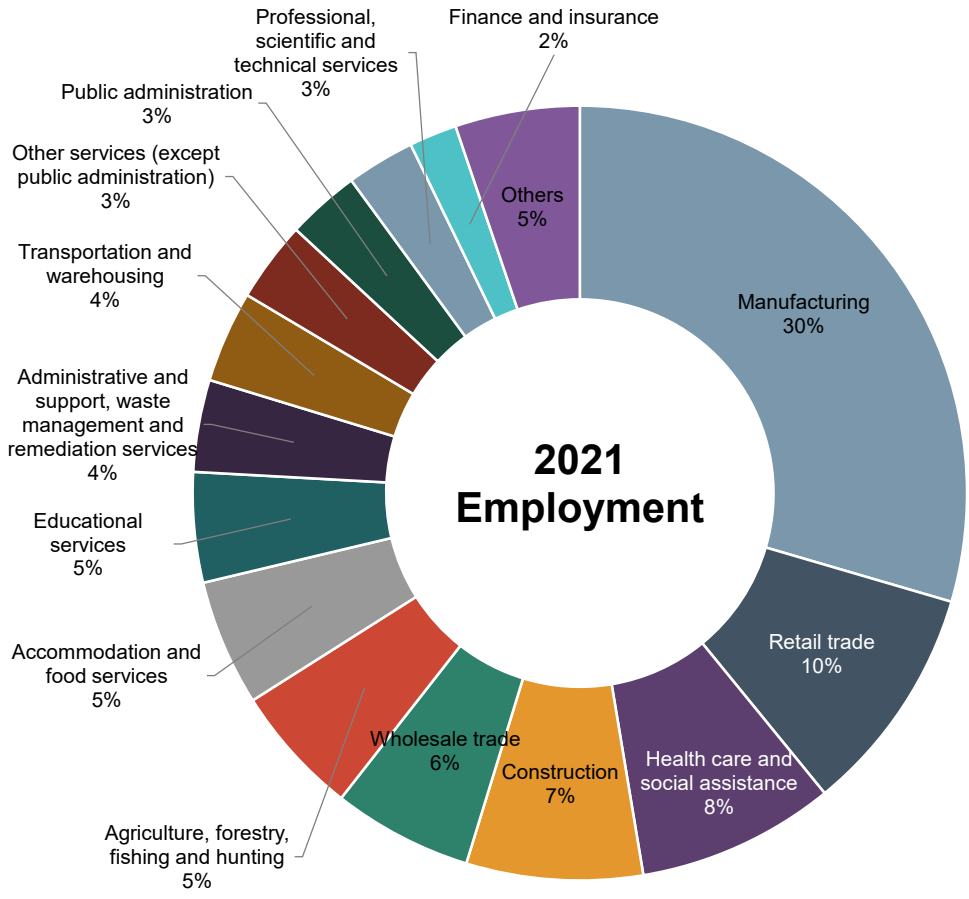


Figure 2-11
Essex County
Estimated Employment Share by Sector, 2021

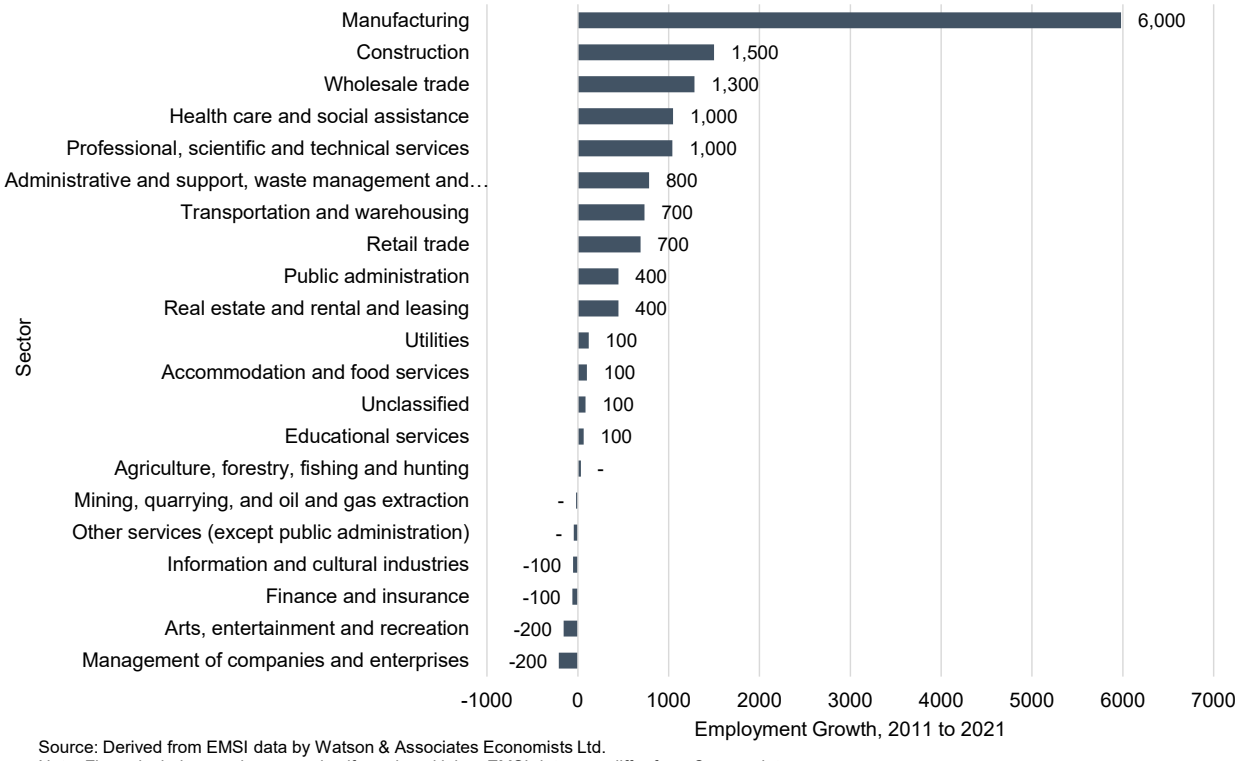


Source: Derived from EMSI data by Watson & Associates Economists Ltd.

As summarized in Figure 2-12, most major commercial, institutional and industrial employment sectors have experienced growth in Essex County over the past decade, driven by a gradual Provincial and regional economic recovery following the 2008/2009 global financial crisis Employment growth across the County has been particularly strong in industrial sectors such as manufacturing, construction, wholesale trade as well as health care and social assistance and professional, scientific, and technical services, which experienced notable increases in employment over the past decade. Similarly, the City of Windsor experienced increases in employment in the areas of professional, scientific, and technical services, health care and social assistance. Windsor, however,

did not experience any increases in the manufacturing sector during this period, incurring a moderate decrease in manufacturing jobs.

Figure 2-12
Essex County
Employment Growth, 2011 to 2021



Source: Derived from EMSI data by Watson & Associates Economists Ltd.
Note: Figure includes employees and self-employed jobs. EMSI data may differ from Census data.

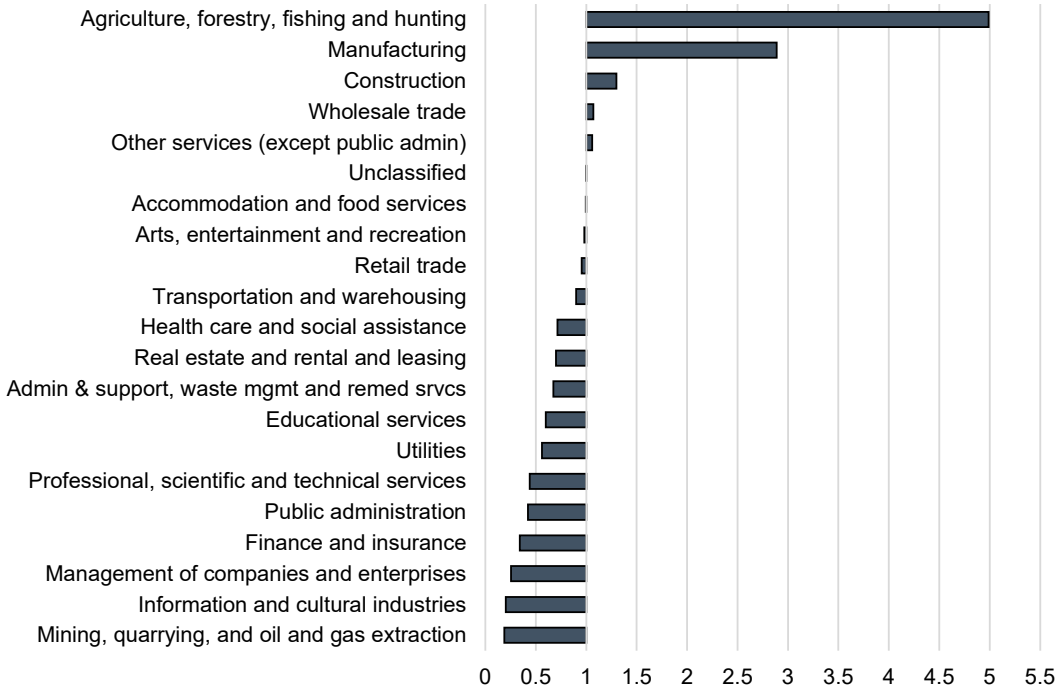
2.4.2 Addressing Regional Economic Opportunities

Figure 2- illustrates the strength of employment sectors in Essex County relative to the Province using location quotients (L.Q.) by size (based on number of employees) and recent growth trends.[1] As shown, the County has a relatively high employment concentration in agriculture, forestry fishing and hunting, manufacturing, construction and wholesale trade. In contrast, certain emerging "knowledge-based" clusters,

[1] An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 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 or "cluster."

including professional, scientific and technical services, public administration, real estate and rental and leasing, as well as educational services are less concentrated but have recently been experiencing moderate to strong employment growth.

Figure 2-12
Essex County Relative to Ontario
Location Quotient, 2021



Note: The L.Q. of the mining, quarrying, and oil and gas and extraction industry, and agriculture, forestry, fishing and hunting sectors is 0 and not shown in the figure.
Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2022.

2.5 Observations

A broad range of considerations related to demographics, economics, and socio-economics is anticipated to impact employment growth trends in Essex County over the coming decades. These factors will not only affect the rate and magnitude of growth but will also influence the built-form, density, and location of non-residential development and the need for employment lands over the long term.

Over the past several decades, the provincial economy has been steadily shifting away from goods-producing sectors and moving towards increasingly services-producing and knowledge-based sectors. As a result of these continued structural changes occurring in the macro-economy, it is important to recognize that the above-mentioned trends will generate both positive and disruptive economic impacts related to employment growth, local business investment, and labour force demand. These disruptive forces are also anticipated to have long-term impacts on industrial, commercial, and retail space requirements, as well as long-term employment land needs, which must be considered and monitored on an on-going basis when planning for non-residential development within Essex County.

Essex County is characterized by a blend of expansive rural lands and vibrant urban areas. The County's urban and rural landscapes form a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to this area. Since the onset of the pandemic, COVID-19 has acted as a near-term driver of housing demand, led by increased opportunities for remote work and the reconsideration by some Ontario residents to trade "city lifestyles" for a greater balance of urban and rural living. It is recognized, however, that the longer-term population and employment growth potential for Essex County will be heavily dependent on sustained economic growth potential of the broader economic region. As such, it is important not to overstate the near-term impacts of COVID-19 on housing demand and economic growth in Essex County over the long term.

The County's employment base is particularly concentrated in employment sectors related to manufacturing, agriculture and construction. These sectors, as well as other emerging knowledge-based industries, are anticipated to represent the fastest growing segments of the County's economy.

With a strong regional growth outlook for manufacturing employment in the Windsor-Essex Regional Area, this sector remains an important component of the County's industry base. Looking forward, opportunities exist mainly for small to mid-sized firms that will benefit from the economic synergies offered between the County, the City of Windsor and the larger and growing employment markets within southwestern Ontario.

Agricultural activities are significant to the overall Essex County economy. The agriculture and agri-food system encompasses several industries, including the farm input and service supplier industries, primary agriculture, food and beverage

processing, food distribution, retail, wholesale, and food service industries, as well as other on-farm diversified uses. A key planning principle for the County is to promote and protect the predominately agricultural character and economy of the County by ensuring the continued viability of agricultural resource areas, the agricultural industry, as well as the County's urban and rural communities that support the agricultural sector.

As the employment base continues to grow within the County and the surrounding commuter-shed, the economy is also anticipated to diversify, generating a range of new live/work and commuting opportunities. Accordingly, Essex County will continue to be a desirable location for workers to live, leading to steady population growth across the County. Over the next 30 years, the County's local employment base is also anticipated to benefit from the regional economic expansion anticipated within neighbouring municipalities in southwestern Ontario. Raising the economic profile of the County by leveraging the economic opportunities and strengths of the broader regional economy should represent a key long-term economic development strategy for Essex County.

Chapter 3
Demographic and Housing Trends within Essex County

3. Demographic and Housing Trends within Essex County

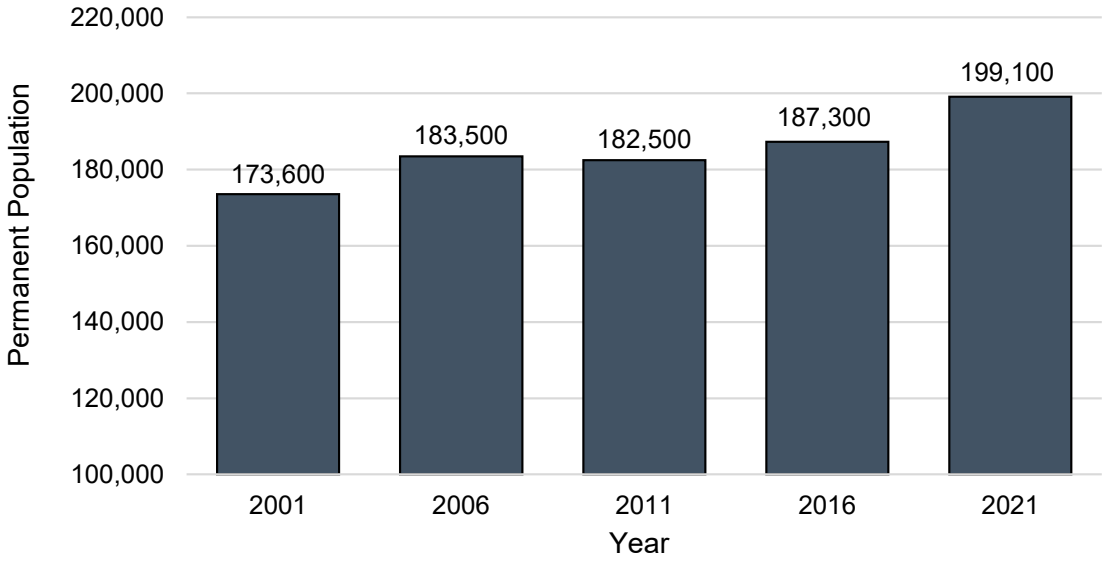
The following chapter provides a review of recent demographic, socio-economic, employment and housing trends within Essex County during the 2001 to 2021 period. This analysis has been assembled to provide insight regarding the future long-term population, housing and employment outlook for the County and its Area Municipalities. It is noted that the historical time period examined differs throughout this chapter subject to data availability.

3.1 Essex County Historical Demographic Trends

3.1.1 Historical Population Trends, 2001 to 2021

Figure 3-1 summarizes historical permanent population trends for Essex County between 2001 and 2021 based on Statistics Canada Census data. During this historical time period, the County's population increased from 173,600 in 2001 to 199,100 in 2021, a total increase of 25,500 residents or an annual increase rate of approximately 0.7%. Comparatively, the population base for the Province of Ontario and City of Windsor grew at an average annual rate of 1.1% and 0.4%, respectively, during the same time period.

Figure 3-1
Essex County
Historical Total Population, 2001 to 2021



Note: Population includes the net Census undercount. Figures have been rounded.
Source: 2001 to 2016 from Statistics Canada Census. 2021 estimated by Watson & Associates Economists Ltd., 2022.

Figure 3-2 summarizes historical trends in population structure by major age group over the 2001 to 2021 period for Essex County. Similar to the Province as a whole, the population of Essex County is getting older on average (i.e., increasing median age of population) largely due to the aging of the Baby Boomers.[1] The first wave of this demographic group turned 75 years of age in 2021. More specifically, the share of population in the 55+ age cohort steadily increased from 20% in 2001 to 35% in 2021.

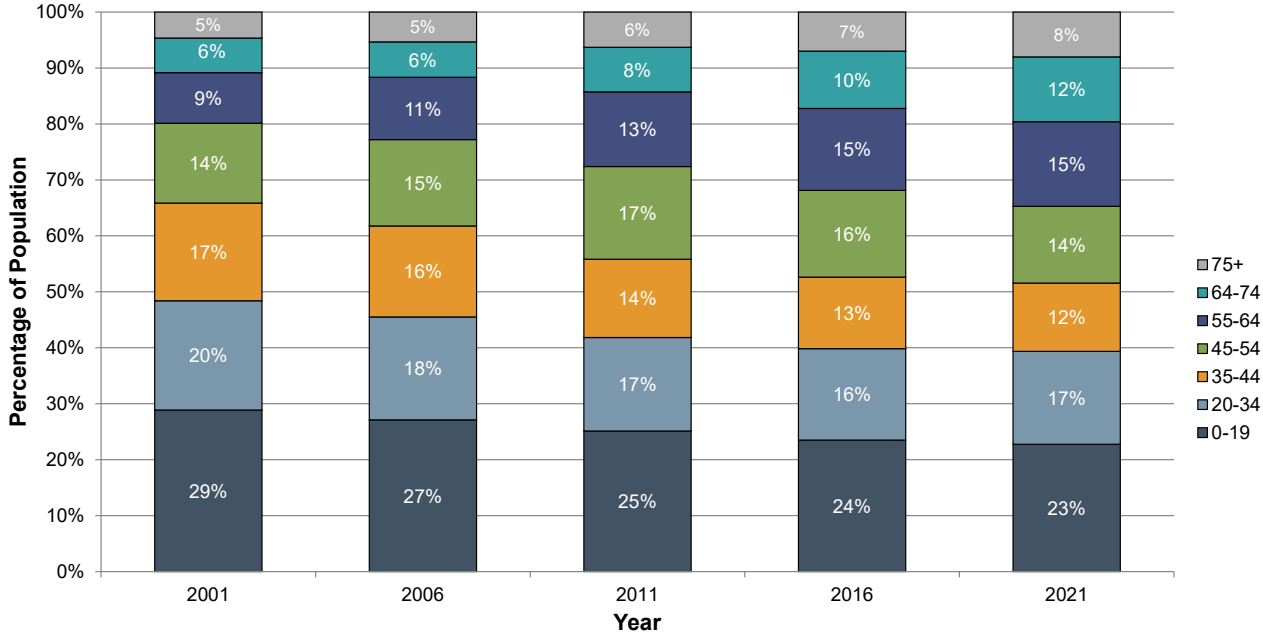
In contrast to the 55+ population age group, the population share of the 0 to 19 age group declined from 29% in 2001 to 23% in 2021. Similarly, the share of the 35 to 54 age group steadily declined from 31% in 2001 to 26% in 2021. Lastly, the population share of the young adult population age group (20 to 34) has experienced a modest decline from 20% to 17% from 2001 to 2021.

Historical and future population trends by age within Essex County are important to consider as these trends have a direct impact on housing needs by structure type (i.e.,

[1] Baby Boomers are generally defined as people born between 1946 and 1964.

grade-related housing forms vs. high-density housing types) and tenure (i.e. ownership vs. rental) as well as municipal service needs.

Figure 3-2
Essex County
Historical Permanent Population by Major Age Group, 2001 to 2021

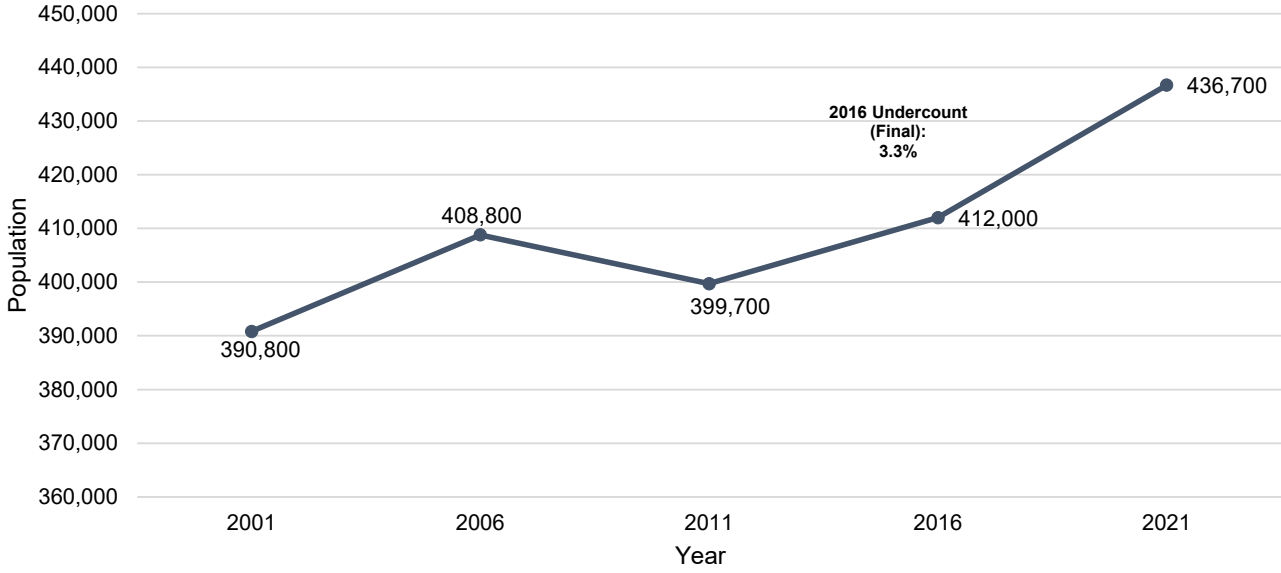


Note: Population includes net Census undercount.
Source: Historical Population 2001 to 2021 derived from Statistics Canada Census by Watson & Associates Economists Ltd.

3.2 Population Growth Trends for the Windsor-Essex Area, 2001 to 2021

Figure 3-3 provides a summary of annual population growth trends for the Windsor-Essex Area between 2001 and 2021 based on Statistics Canada Census data. Between 2001 and 2011, the population of the Windsor-Essex Area grew modestly at an annual rate of 0.2%, with a moderate decline in population of approximately 9,100 persons between 2006 and 2011. Since 2011, the annual population growth rate of Windsor-Essex has increased sharply, growing at a rate of 0.9% per year. Comparatively, the annual population growth rate for the Province of Ontario was 1.1% between 2001 and 2011, decreasing to 1.0% between 2011 and 2021.

Figure 3-3
Windsor-Essex Area
Total Population, 2001 to 2021

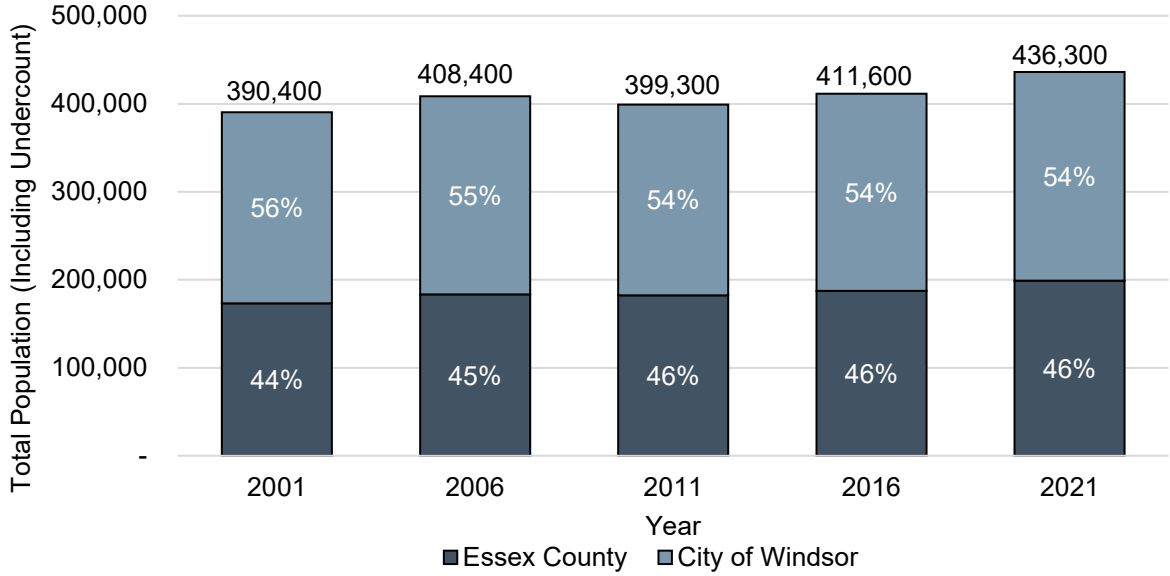


Note: Population includes the net Census undercount and is rounded. 2021 population adjusted for net Census undercount of 3.3%.
Source: Derived from Statistics Canada Census data, 2001 to 2021 by Watson & Associates

3.2.1 Essex County Population Growth Trends Relative to the Windsor-Essex Area

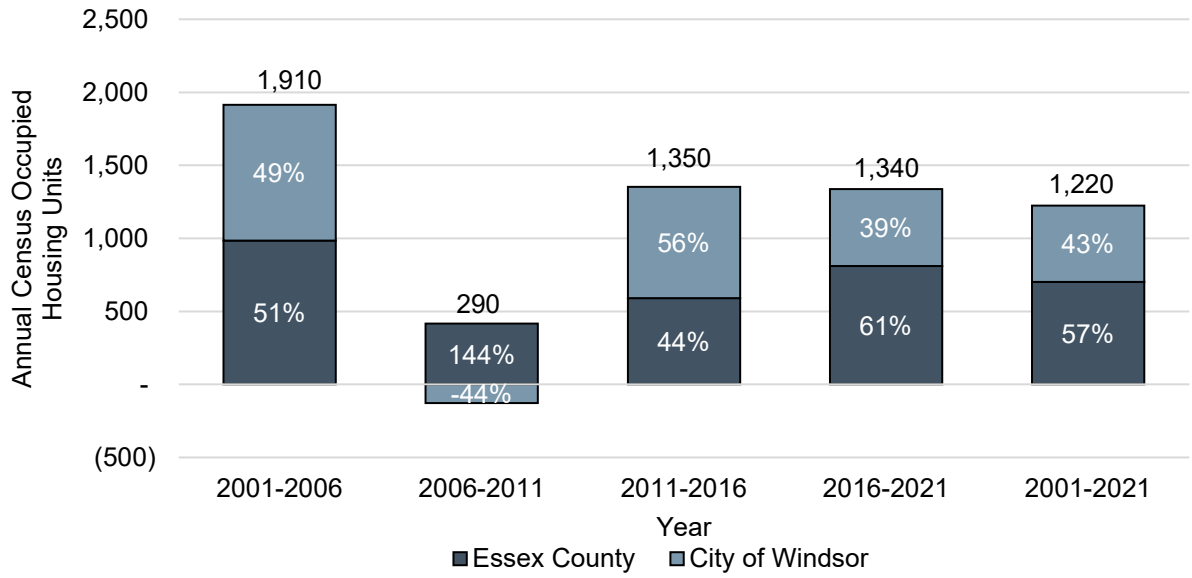
Figure 3-4 and Figure 3-5 summarize the historical share of population and housing growth between Essex County relative to the Windsor-Essex Area from 2001 to 2021. During this historical period, the Essex County population accounted for approximately 57% of the total population growth within the Windsor-Essex Area. During the most recent five-year Census period (2016 to 2021), however, the County's population growth share of the total Windsor-Essex Area increased to 61%. Looking forward, the County's share of population growth within the Windsor-Essex Area is anticipated to continue to modestly increase, driven by the County's attractiveness to a broad range of residents by age and income (refer to section 5.2).

Figure 3-4
Essex County
Windsor-Essex Area Share of Total Population, 2001 to 2021



Note: Population includes net Census undercount.
Source: 2001 to 2021 derived from Statistics Canada Census by Watson & Associates Economists Ltd.

Figure 3-5
Essex County
Windsor-Essex Area Household Growth Share, 2001 to 2021



Note: Figures have been rounded.
Source: 2001 to 2021 derived from Statistics Canada Census by Watson & Associates Economists Ltd.

3.2.2 Historical Net Migration Trends for Windsor-Essex

Figure 3-6 and Figure 3-7 summarize net migration trends for the Windsor-Essex Area.[1] Net migration is anticipated to represent the primary component of forecast population growth in Essex County as a result of diminished population growth from natural increase due to the aging of the population. Net migration can be broken into three broad categories, including:

- **International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents. Over the 2001 to 2021 historical period, this represents the largest source of net migration for the Windsor-Essex Area;
- **Inter-provincial Net Migration** – comprises in-migration less out-migration from other Canadian provinces/territories. Historically this has not been a major source of net migration for the Windsor-Essex Area; and
- **Intra-provincial Net Migration** – includes in-migration less out-migration from elsewhere within the Province of Ontario. This has not been a source of net migration over the last two decades for the Windsor-Essex Area.

A key driver of population growth from 2016 to 2021 primarily relates to an increase in international net migration. During this period, out-migration from the Windsor-Essex Area to other destinations across Canada and outside Canada also sharply decreased contributing to stronger population growth for this area.

[1] Details regarding net migration by type are not available for specifically for Essex County.

Figure 3-6
Windsor-Essex Area
Percentage Net Migration by Type, 2001 to 2021

	International Immigration Less Emigrants	Net Non-Permanent Residents	International Net Migration	Inter-provincial Net Migration	Intra-provincial Net Migration	Total
	A	B	C = (A + B)	D	E	F = C + D + E
2001-2006	224%	11%	236%	-70%	-65%	100%
2006-2011	-15%	4%	11%	-55%	-56%	-100%
2011-2016	41%	130%	171%	-49%	-22%	100%
2016-2021	62%	53%	115%	1%	-16%	100%

Note: Negative values indicate out-migration exceeded in-migration.
Source: Derived from Statistics Canada Table 17-10-0140-01. Components of population change by Census division, 2016 boundaries.

Figure 3-7
Windsor-Essex Area
Total Net Migration by Type, 2001 to 2021

	International Immigration Less Emigrants	Net Non-Permanent Residents	International Net Migration	Inter-provincial Net Migration	Intra-provincial Net Migration	Total
	A	B	C = (A + B)	D	E	F = C + D + E
2001-2006	7,300	400	7,700	-2,300	-2,100	3,200
2006-2011	2,200	-600	1,600	-8,000	-8,200	-14,600
2011-2016	2,700	8,800	11,500	-3,300	-1,500	6,700
2016-2021	8,200	7,000	15,200	100	-2,200	13,200

Note: Figures may add sum precisely due to rounding. Figures are not adjusted for the residual deviation.
Source: Derived from Statistics Canada Table 17-10-0140-01. Components of population change by Census division, 2016 boundaries.

Figure 3-8 illustrates the share of intra-provincial and inter-provincial migration to the Windsor-Essex Area from 2015 to 2020. Additional details regarding the age of intra-provincial and inter-provincial in-migration by age are provided in Appendix A. Key observations include:

- Central Ontario, also referred to as the Greater Golden Horseshoe (G.G.H.) accounted for the largest share of migration, comprising 46% of all migration from Canada to the Windsor-Essex Area. The G.T.H.A. comprised 34% of

migration and the G.G.H. Outer Ring comprised 11%. The Census divisions that experienced the most migration to the Windsor-Essex Area in the G.G.H are the City of Toronto, Peel Region, Region of Waterloo and York Region.

- The remaining areas outside the G.G.H. in Ontario represented 28% of migration, with the highest amount coming from the Municipality of Chatham-Kent and Middlesex County.
- The provinces outside of Ontario also represented a notable source of migration, accounting for 26% of migration. The Cities of Edmonton, Calgary and Vancouver have the highest amount of migration to the Windsor-Essex Area.

Figure 3-8
Windsor-Essex Area
Location of Interprovincial and Intra-provincial Net Migration
to the Windsor-Essex Area, 2015 to 2020

Geographic Area	Share of Migration from Canadian Census Divisions to the Windsor-Essex Area, 2015 to 2020
G.T.H.A.	34%
G.G.H. Outer-Ring	11%
G.G.H. Total	**46%**
Remaining Ontario	28%
Ontario Total	**74%**
Outside Ontario	**26%**
Total	**100%**

Source: Derived from Statistics Canada custom order data, by Watson & Associates Economists Ltd.

3.3 Essex County Historical Housing Trends

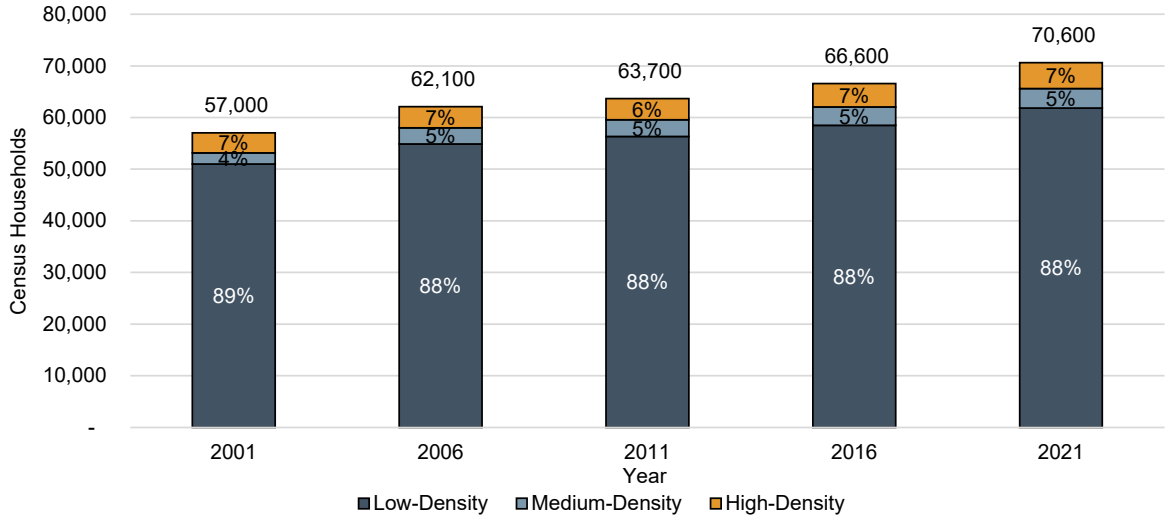
3.3.1 Census Housing Growth Trends

Similar to the recent population growth trends explored above, Essex County has experienced a steady increase in housing over the past 20 years as measured by Statistics Canada Census data. Housing growth was particularly strong between 2001 and 2006, as well as during the 2016 to 2021 period, reflective of the steady regional economic recovery experienced throughout Windsor-Essex following the 2008/2009 global economic downturn.

Over the past 20 years, the County's housing base increased by 13,600 households from 57,000 to 70,600, which represents an increase of approximately 680 Census households per year. Figure 3-9 and Figure 3-10 summarize housing growth by density type between 2001 and 2021. Low-density households include single and semi-detached units, medium-density households comprise townhouses and apartments in duplexes, while apartments are included in the high-density category. Low-density housing has made up the majority of new housing development over the past 20 years, at 77% of Census housing growth. Over the next 30 years, it is anticipated that housing development within the County will be increasingly concentrated in medium- and high-density forms, largely driven by declining housing affordability associated with grade-related housing forms, combined with the aging of the County's population base, which is anticipated to drive greater need for higher-density housing types, including seniors housing.

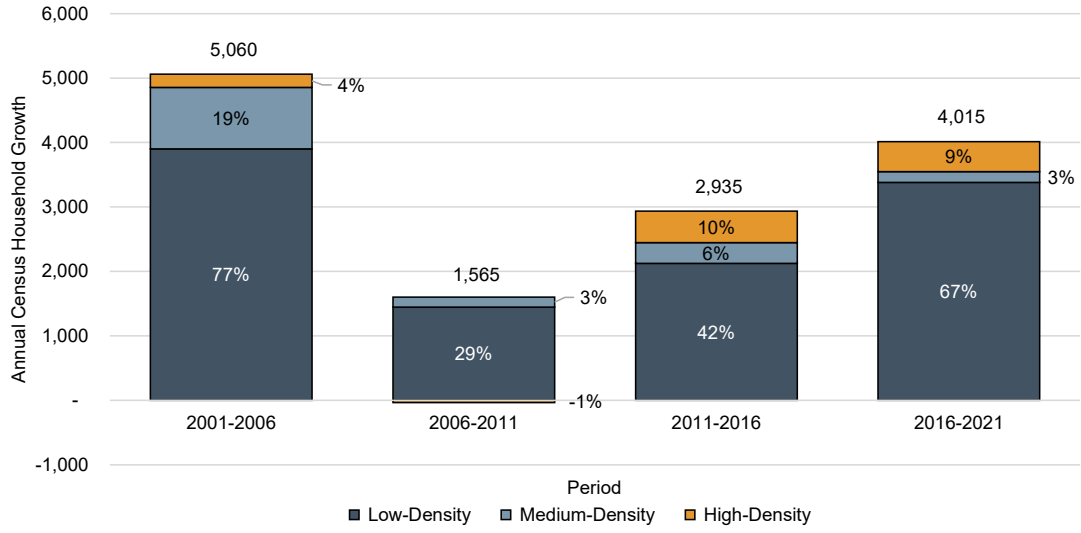
Between 2020 and 2021, following the onset of COVID-19, housing demand across Essex County was exceptionally strong, fueled by ultra-low interest rates combined with outward growth pressure from the G.T.H.A. It is noted that with the recent increase in mortgage rates across Canada in response to current inflation pressures, the housing market across most economic regions of the County, including Windsor-Essex, has cooled considerably since May 2022. This is discussed further in section 3.2.4.

Figure 3-9
Essex County
Historical Number of Households, 2001 to 2021



Note: Low-Density includes singles and semi detached.
Medium-Density includes townhouses and apartments in duplexes.
High-Density includes bachelor, 1-bed, 2-bed+ apartments.
Source: 2001 to 2016 derived from Statistics Canada Census by Watson & Associates Economists Ltd.

Figure 3-10
Essex County
Historical Share of Housing Growth by Type, 2001 to 2021



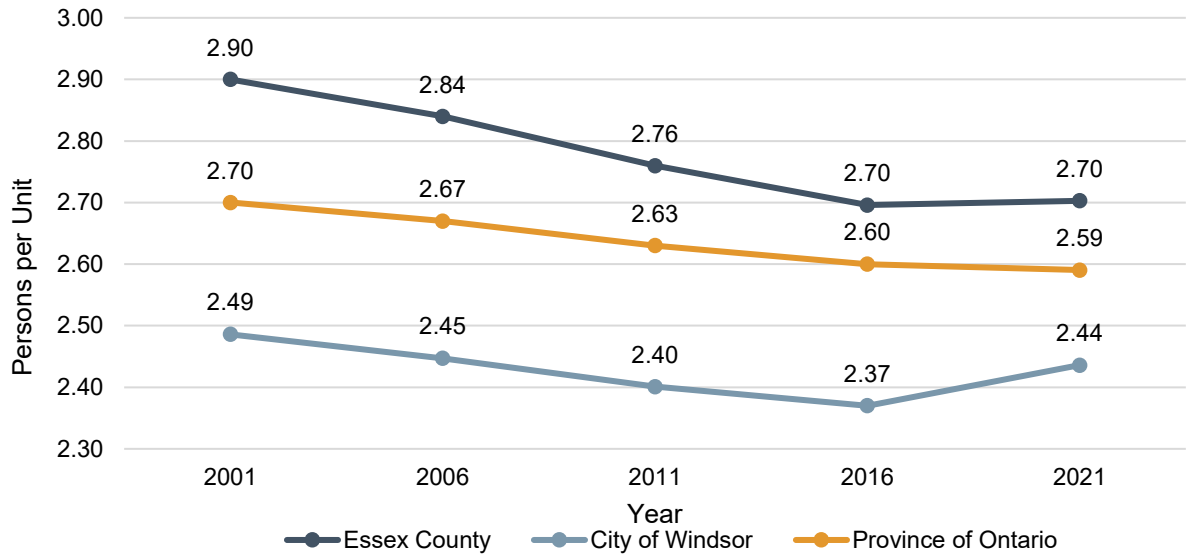
Note: Low-Density includes singles and semi detached.
Medium-Density includes townhouses and apartments in duplexes.
High-Density includes bachelor, 1-bed, 2-bed+ apartments.
Source: 2001 to 2021 derived from Statistics Canada Census by Watson & Associates Economists Ltd.

3.3.2 Persons Per Housing Unit, 2001 to 2021

Figure 3-11 summarizes trends in average housing occupancy for Essex County, the City of Windsor and the Province of Ontario over the 2001 to 2021 period, expressed as the average number of P.P.U. Trends in household occupancy and age structure are particularly important statistics for land use planners, as these trends have broad implications related to the amount and type of future housing needs associated with population growth as well as demands for public infrastructure, municipal services and schools. Key observations include the following:

- The average P.P.U. for Essex County steadily declined over the 2001 to 2016 period before experiencing a modest increase in 2021.
- The average P.P.U. for the City of Windsor is significantly lower relative to Essex County. The City of Windsor experienced less average P.P.U decline between 2001 and 2016, followed by a larger average P.P.U. increase between 2106 and 2021.
- Average housing occupancy levels for the Province as a whole are lower relative to Essex County, and the decline in the P.P.U. between 2001 and 2021 was higher within Essex County.
- Over the next 30 years, the average P.P.U. level for the County is anticipated to continue to decline; however, this trend is likely to moderate driven by relatively stronger forecast net migration levels to the County, particularly associated with young adults and families.

Figure 3-11
Essex County, City of Windsor, and the Province of Ontario
Historical Persons Per Unit Trends, 2001 to 2021



Note: Population used to calculate persons per unit does not include the net Census undercount.
Source: Derived from Statistics Canada Census by Watson & Associates Economists Ltd. 2022.

3.3.3 *Housing Propensity by Population Age*

Figure 3-12 summarizes historical housing propensity (i.e., demand) trends by structure type for Census households (private dwellings occupied by usual residents) in Essex County based on 2016 Statistics Canada Census data.[1] As previously discussed in Chapter 1, section 1.6.1, age-specific propensities measure housing demand by dwelling structure type, by age of household maintainer.

The socio-economic characteristics of the County's population related to income/ affordability, lifestyle, family size, lifestyle decisions, health and mobility vary by population age, which in turn influences the demand for housing by structure type. As illustrated in Figure 3-11 and Figure 3-12, propensity for low-density housing (single detached and semi-detached) is high among all age groups, particularly over the age of 25. Propensities for high-density housing (apartments) are highest among the under-25 age group at 25%, followed by the 75+ age group. It is noted that demand for medium

[1] It is noted that 2021 Statistics Canada housing propensity data will not be available until the fall/winter of 2022.

and high-density housing types has been increasing for the County in recent years across all age groups.

As previously mentioned, Essex County's population is aging and the 55+ age group has grown considerably over the past 15 years. Looking forward, the percentage of seniors within Essex, particularly the 75+ age group, is expected to increase in both percentage and absolute terms over the next several decades. As the average age of Essex County's population continues to increase, it is anticipated that the demand for higher-density housing forms will also continue to steadily increase.

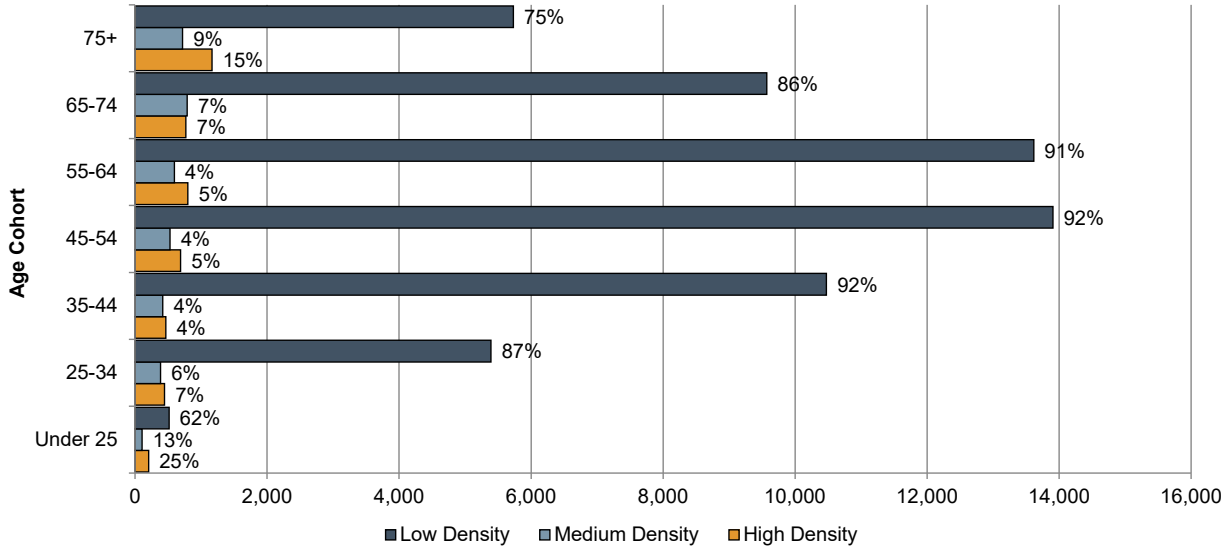
Recent building permit activity highlights a strong demand across all housing types housing, (i.e. single-detached/semi-detached, townhouses and low to mid rise apartments) particularly in locations which provide proximity to urban amenities, municipal services and community infrastructure. Recent discussions with local builders highlights an increasing level of demand for townhouses and low to mid-rise apartment style housing geared to empty-nesters. With respect to the 75+ age group, the physical and socio-economic characteristics of this cohort, on average, are considerably different than those of younger seniors, empty nesters and working adults with respect to income, mobility, and health. Typically, these socio-economic and physical characteristics represent key drivers behind the higher propensity from this age group for medium- and high-density housing forms, including seniors' housing, that are in proximity to urban amenities, health care services and other community facilities.

It is important to note that growth in high-density housing presented herein relates to private dwellings occupied by usual residents and does not include the population living in collective dwellings. Over the next 30 years, the rate of population growth associated with collective dwellings is also expected to steadily increase relative to historical trends, largely due to demand from the 75+ age group. The 75+ age group is anticipated to represent the fastest growing age group across Essex County, placing demands on accommodations such as seniors' housing, including nursing homes, assisted living, and long-term care homes, which in many cases are not categorized by Statistics Canada as private dwellings occupied by usual residents.

Essex County is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Accordingly, a broad mix of future housing options across a range of density types will

be required to accommodate both younger and older adults across varying income levels, including affordable housing options, throughout the County.

Figure 3-12
Essex County
Propensity by Structure Type, 2016



Notes:
Low density includes singles and semis.
Medium density includes townhouses and apartments in duplexes.
High density includes bachelor, 1-bedroom and 2-bedroom + apartments.
Source: Derived from Statistics Canada 2016 Census data by Watson & Associates Economists Ltd.

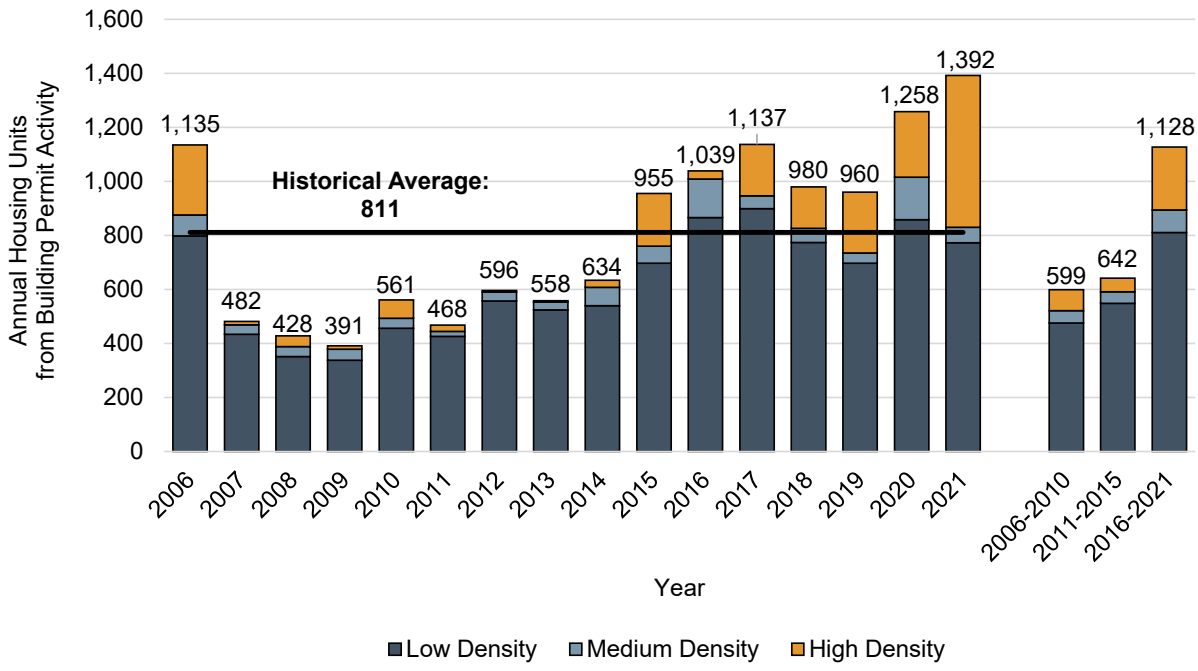
Trends in age-specific housing propensities by housing structure type represents an important consideration in developing long-term assumptions regarding forecast housing growth by structure type. In addition to population age structure, however, there are a number of factors that should be broadly recognized when assessing forecast housing demand by structure type. These factors include trends in housing affordability, lifestyle decisions, major infrastructure investments, demand for housing related to on-farm and off-farm workers and planning policy, which are also anticipated to influence the built form and type of housing units constructed across Essex County.

3.3.4 Historical Residential Building Permits, 2006 to 2021

Figure 3-13 summarizes trends in historical residential building permit activity (new units only) for Essex County during the 2006 to 2021 period. Over this 16-year period, Essex County has averaged 811 new residential units annually. Between 2006 and 2010,

annual building permits averaged 599 units, while in the following period between 2011 and 2015, annual building permits increased to 642 units. During the most recent period (i.e., 2016 to 2021), annual building permits averaged 1,128 units, an annual average increase of 76% from the previous period. It is also important to note that during the recent 16-year period summarized, the share of building permit activity associated with medium- and high-density dwellings gradually increased.

Figure 3-13
Essex County
Historical Permanent Residential Building Permit, 2006 to 2021

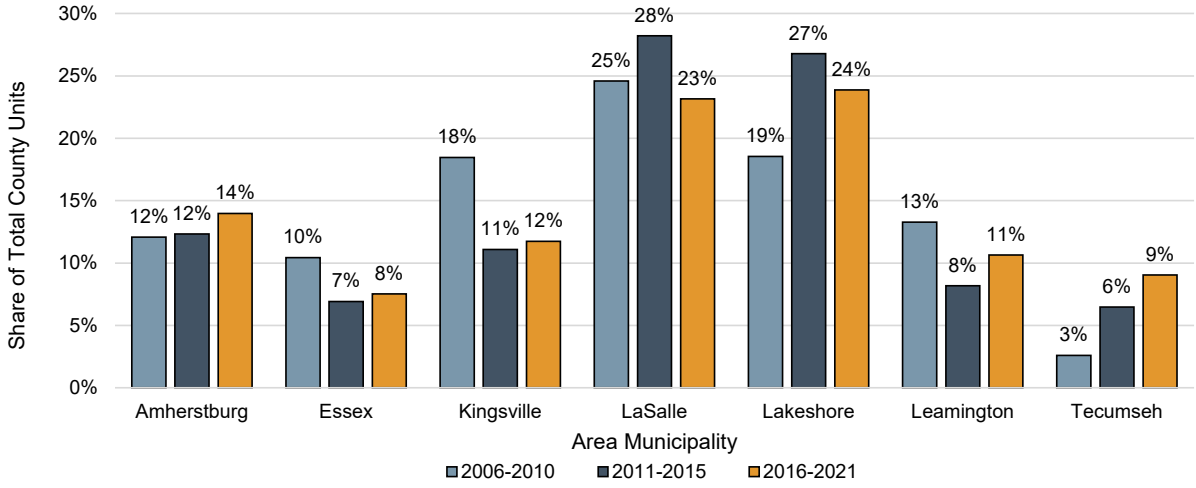


Source: Building permit data from Statistics Canada and Essex County. Summarized by Watson & Associates Economists Ltd.

Figure-14 summarizes historical building permit activity by Area Municipality over the 2006 to 2021 period. During this 16-year historical period, most new development was accommodated within the Town of LaSalle and the Municipality of Lakeshore, accounting for approximately 44%, 55% and 50% of County-wide residential development from 2006 to 2010, 2011 to 2015, and 2016 to 2021, respectively. The municipalities of Amherstburg and Tecumseh have also experienced growth in the

recent historical period, increasing their combined share of growth from 18% to 25% from the 2011 to 2015 period to the 2016 to 2021 period.

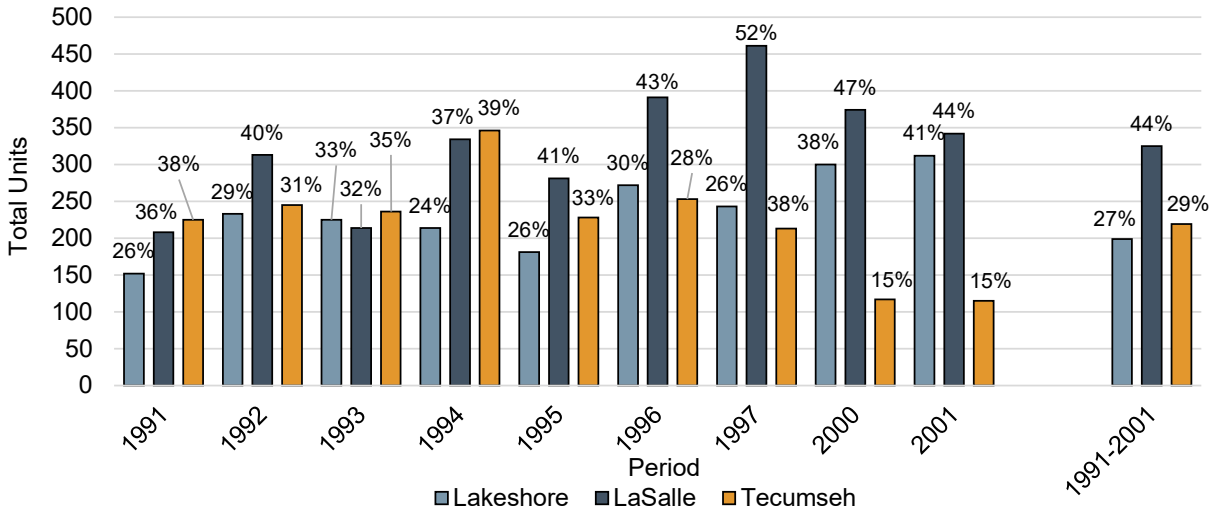
Figure 3-14
Essex County
Share of Residential Building Permits Issued (New Dwellings Only)
by Area Municipality, 2006 to 2021



Source: Derived from Statistics Canada and Essex County building permit data by Watson & Associates Economists Ltd., 2022.

Figure 3-15 summarizes historical building permit activity for the Municipality of Lakeshore, the Town of LaSalle, and the Town of Tecumseh over the 1991 to 2001 period. This additional analysis has been provided to demonstrate the historical relationship regarding annual residential building permit activity between these three municipalities during a period when residential development was not constrained by municipal water and wastewater capacity in the Town of Tecumseh, as it was for portions of the 2006 to 2021 period. During the 1991 to 2001 period, residential building permit activity (i.e., new dwellings only) was more balanced between these three municipalities, particularly during the 1991 to 1995 period.

Figure 3-15
Municipality of Lakeshore, Town of LaSalle, Town of Tecumseh
Share of Residential Building Permits Issued (New Dwellings Only)
by Area Municipality, 1991 to 2001



Note: 1998 and 1999 excluded due to the lack of available data.
Source: Statistics Canada building permit data, summarized by Watson & Associates Economists Ltd.

The Town of Tecumseh is making significant investments to ensure that servicing is available to accommodate significantly higher projected population, housing and employment demand in their designated Primary Settlement Areas. With the availability of land now coming on stream in Tecumseh, and given the Town's inherent locational, servicing and transportation attributes, future population and employment growth allocations for the Town of Tecumseh are anticipated to be relatively comparable with the Town of Lakeshore and the Town of LaSalle.

3.3.5 Housing Price Trends in Essex County and Comparator Municipalities, 2011 to 2021

Economic conditions and housing prices play key roles in shaping housing development trends. Over the past two decades, southern/southwestern Ontario has experienced a steady increase in housing prices driven by a number of factors, including rising land prices, steady net migration and population growth. Generally, strong fundamentals associated with the Canadian economy have also attracted a steady stream of local and foreign investment to the southern Ontario economy and real estate market (e.g., the favourable Canadian/U.S. exchange rate, stable banking sector, world class education system, etc.).

Figure 3-16 summarizes historical trends in average housing prices for Essex County and several comparator municipalities for single detached dwelling units between 2011 and 2021. Housing prices for new single detached units vary considerably, with average prices highest in the G.G.H. municipalities of Mississauga, Burlington, and Caledon. Comparatively, the average price for a single detached house is significantly higher in the G.G.H. relative to the comparator municipalities except for the City of Hamilton.

With respect to housing appreciation for new single detached units, Mississauga, Burlington, Windsor, and Tecumseh have experienced the strongest average annual growth rate over the past 10 years, with the municipalities of LaSalle, St. Thomas, Cambridge, London, and Sarnia following closely in this regard. Essex County has experienced a comparably higher rate of annual housing price appreciation for new single detached units over the last decade.

As previously mentioned, the low interest rate environment following the 2008/2009 global financial crisis has played a key role in driving the appreciation of residential and non-residential real estate values on a national and international scale. Most recently, the COVID-19 pandemic has accelerated housing price appreciation across Canada since mid-2020, following a sharp reduction in mortgage rates as of March 2020; however, as previously noted, housing prices peaked across most regions of the Country in February/March 2022. A recent study prepared by Desjardins Economic Studies predicts Ontario home prices will fall 24% from their February peak by the end of 2023.[1] The above-mentioned report notes that housing price declines are projected to be higher for the Windsor-Essex Area and the Municipality of Chatham-Kent relative to the provincial average.

[1] Desjardins Economic Studies. Spotlight on housing August 18, 2022.

Figure 3-16
Essex County and Surrounding Area
Historical Trends in Housing Prices

Municipality	New Single Detached Price, 2011	New Single Detached Price, 2021	Annual Increase in New Single Detached Housing Unit, 2011-2021
City of Mississauga	$895,000	$2,827,000	12%
City of Burlington	$787,000	$2,542,000	12%
Town of Caledon	$595,000	$1,341,000	8%
Town of Tecumseh	$459,000	$1,265,000	11%
Town of LaSalle	$375,000	$974,000	10%
City of Waterloo	$452,000	$893,000	7%
City of Cambridge	$361,000	$886,000	9%
City of London	$354,000	$812,000	9%
City of Kitchener	$413,000	$808,000	7%
City of Windsor	$267,000	$732,000	11%
City of Sarnia	$307,000	$723,000	9%
City of St. Thomas	$282,000	$703,000	10%
Municipality of Lakeshore	$351,000	$684,000	7%
City of Hamilton	$420,000	$609,000	4%
Municipality of Chatham-Kent	$298,000	$461,000	5%

Source: Derived from Canadian Mortgage Housing Corporation (CMHC), Housing Market Absorption Survey, by Watson & Associates Economists Ltd., 2022.

3.4 Household Income Trends

Figure 3-17 summarizes average household income growth for Essex County and the Province of Ontario between 2000 and 2020. Key observations are as follows:

- As of 2020, the estimated average household income in Essex County was $122,500 which is higher compared to the average household income for the Province of Ontario.

- The annual rate of household income growth in Essex County during the 2001 to 2006 and 2006 to 2011 periods was 0.2%, significantly lower relative to the annual growth rate for the Province of Ontario.
- The annual rate of household income growth in Essex County increased significantly in the 2011 to 2016 period relative to the previous 2001 to 2011 period. Overall household income growth during the past 15 years in the County has been lower relative to the Province of Ontario.

Figure 3-17
Essex County, City of Windsor, and Province of Ontario
Average Household Income, 2001 to 2021 Census Years

Average Household Income			
Census Year	Essex County	City of Windsor	Province of Ontario
2001	$85,400	$66,500	$66,800
2006	$86,100	$63,300	$78,000
2011	$87,100	$62,200	$85,800
2016	$105,300	$71,500	$97,900
2021	$122,500	$86,800	$116,000

Average Household Income Annual Growth			
Census Year	Essex County	City of Windsor	Province of Ontario
2001-2006	$140	-$640	$2,240
2006-2011	$200	-$220	$1,560
2011-2016	$3,640	$1,860	$2,420
2016-2021	$3,440	$3,060	$3,620

Average Household Income Annual Growth Rate			
Census Year	Essex County	City of Windsor	Province of Ontario
2001-2006	0.2%	-1.0%	3.1%
2006-2011	0.2%	-0.3%	1.9%
2011-2016	3.9%	2.8%	2.7%
2016-2021	3.1%	4.0%	3.5%

Note: Census year income shown is for the previous year (e.g., 2001 to 2021 is 2000 to 2020 income).
Source: 2001 to 2021 data derived from Statistics Canada Census and NHS by Watson & Associates Economists Ltd.

As summarized above, average household income growth has not kept pace with rising housing prices. As a result, housing affordability has steadily eroded over the past decade across the Province, most notably within the larger urban centres of the G.T.H.A. Declining housing affordability across Ontario over the past several decades, and most notably over the past five years, has served as a key driver regarding the steady shift in housing demand from low-density housing forms to medium- and higher-density housing forms. While ownership and rental housing is still more affordable in Essex County relative to most of the comparator municipalities reviewed, housing affordability is also declining in this area as housing appreciation continues to outpace household income growth. As such, there is a need to ensure that continued effort is made within Essex County to accommodate a broad range of housing types (i.e., ground oriented and high density) for all ages and income group levels.

3.5 Observations

Over the past 20 years, Essex County has experienced uneven population growth, which has been largely influenced by periods of regional economic growth and contraction. Over the 2001 to 2011 period, Essex County's population grew at a moderate pace of 0.2% annually. Since 2011, the rate of population growth across the County has increased substantially, driven by steady net migration across all major demographic groups (i.e., children, adults and seniors). Between 2011 and 2021, the County's annual population growth rate increased to 0.9%, fueling demand for steady new housing construction throughout the County. This recent trend towards relatively stronger annual new housing construction is anticipated to continue over the medium to long term, notwithstanding a general cooling in the housing market in the near term.

Historically, residential development activity within Essex County has been heavily concentrated in low-density housing forms (i.e., singles and semi-detached). During the most recent period from 2016 to 2021, the County experienced a shift toward a higher share of medium-density and high-density housing forms, which have accounted for over one-quarter of all residential construction in terms of new units.

The population base of Essex County is older on average than the Province as a whole and is aging. The County is also highly attractive to empty nesters and retirees within the 55+ age group given the opportunities the County provides with a balance of urban and rural living within its vibrant urban communities and rural settlement areas. The

County's mild climate and access to recreation associated with the Lake Erie, Lake St. Clair and Detroit River shoreline, Point Pelee National Park, as well as the surrounding rural countryside, also represents a key draw to this area. Furthermore, the County provides an extensive trail and active transportation network for local residents and tourists.

Essex County is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Accordingly, a broad mix of future housing options across a range of density types will be required to accommodate both younger and older adults across varying income levels, including affordable housing options, throughout the County.

In summary, the demographic and socio-economic trends explored in this chapter will continue to have broad implications on the amount, type and density of future housing needs, municipal service needs and public infrastructure requirements for the County over the long term. Chapter 5 provides a detailed discussion with respect to forecast near-term and longer-term population, housing and employment growth for the County as a whole, as well as by Area Municipality.

Chapter 4
Opportunities to Accommodate Residential and Non-Residential Development

4. Opportunities to Accommodate Residential and Non-Residential Development

An initial review of residential and non-residential development opportunities has been undertaken to guide the amount, type and location of future growth in Essex County over the next 30 years. This section of the report includes a summary of housing development applications, based on the various stages of approval obtained to date. A more detailed review of vacant designated residential lands and residential intensification potential will be undertaken as part of Phase 2 of the Essex County C.R. A detailed review of non-residential land supply will also be undertaken in Phase 2 of the Essex County C.R.

4.1 Potential Housing Supply in Active Development Plans

The County's active residential development application data was reviewed to provide insights into the demand for future housing by structure type and location at the Area Municipal level. This inventory includes potential new residential units in final approved applications (i.e., registered, unbuilt), draft approved plans, pre-consultation plans and remaining submitted applications.

As of January 2022, approximately 13,900 units were identified within the development approvals process (i.e., application received, draft approved, pre-consultation, etc.) across the County's Area Municipalities. Figure 4-1 summarizes the County's potential urban housing supply by Area Municipality by development status. Key observations include:

- The County's housing supply is geared towards low-density housing, accounting for 58% of the overall supply, while medium density accounts for 19%, and high-density housing accounts for the remaining 23%.
- Most of the County's potential housing supply in active applications have final approval or are draft approved (54%). Approximately 5,300 units (38%) are in the pre-consultation stage, while the remaining 1,100 units (8%) are identified as having an application submitted.
- Of the County's total future supply potential in active development plans, approximately 48% is located in the Town of Amherstburg and the Town of LaSalle.

Figure 4-1
Essex County
Summary of Future Housing Supply in Active Development Plans by Location and Stage of Development Approval, January 2022

Municipality & Stage of Development	Low Density	Medium Density	High Density	Total	Share by Development Approval Status
Amherstburg	**2,727**	**318**	**391**	**3,436**	**100%**
Pre-con	1,168	0	391	1,559	45%
Final Approval (Unbuilt)	539	318	0	857	25%
Draft Approved	1,020	0	0	1,020	30%
Amherstburg Housing Supply in Active Development Plans by Structure Type	**79%**	**9%**	**11%**	**100%**	
Amherstburg Share of Total Future County-Wide Housing Supply in Active Development Plans	**34%**	**12%**	**12%**	**25%**	
Essex	**1,622**	**219**	**494**	**2,335**	**100%**
Pre-con	864	70	374	1,308	56%
Final Approval (Unbuilt)	541	77	120	738	32%
Draft Approved	217	72	0	289	12%
Essex Housing Supply in Active Development Plans by Structure Type	**69%**	**9%**	**21%**	**100%**	
Essex Share of Total Future County-Wide Housing Supply in Active Development Plans	**20%**	**8%**	**16%**	**17%**	
Kingsville	**1,612**	**59**	**30**	**1,701**	**100%**
Pre-con	703	0	0	703	41%
Final Approval (Unbuilt)	157	0	0	157	9%
Draft Approved	169	0	30	199	12%
Application Received	583	59	0	642	38%
Kingsville Housing Supply in Active Development Plans by Structure Type	**95%**	**3%**	**2%**	**100%**	
Kingsville Share of Total Future County-Wide Housing Supply in Active Development Plans	**20%**	**2%**	**1%**	**12%**	
Lakeshore	**603**	**780**	**391**	**1,774**	**100%**
Pre-con	259	297	275	831	47%
Final Approval (Unbuilt)	171	285	0	456	26%
Draft Approved	173	85	116	374	21%
Application Received	0	113	0	113	6%
Lakeshore Housing Supply in Active Development Plans by Structure Type	**34%**	**44%**	**22%**	**100%**	
Lakeshore Share of Total Future County-Wide Housing Supply in Active Development Plans	**7%**	**29%**	**12%**	**13%**	
LaSalle	**993**	**614**	**1,563**	**3,170**	**100%**
Pre-con	255	22	80	357	11%
Final Approval (Unbuilt)	176	0	338	514	16%
Draft Approved	538	592	1,009	2,139	67%
Application Received	24	0	136	160	5%
LaSalle Housing Supply in Active Development Plans by Structure Type	**31%**	**19%**	**49%**	**100%**	
LaSalle Share of Total Future County-Wide Housing Supply in Active Development Plans	**12%**	**23%**	**50%**	**23%**	
Leamington	**373**	**632**	**106**	**1,111**	**100%**
Pre-con	148	392	0	540	49%
Final Approval (Unbuilt)	143	89	106	338	30%
Draft Approved	82	151	0	233	21%
Leamington Housing Supply in Active Development Plans by Structure Type	**34%**	**57%**	**10%**	**100%**	
Leamington Share of Total Future County-Wide Housing Supply in Active Development Plans	**5%**	**23%**	**3%**	**8%**	
Tecumseh	**144**	**76**	**163**	**383**	**100%**
Draft Approved	0	0	163	163	43%
Application Received	144	76	0	220	57%
Tecumseh Housing Supply in Active Development Plans by Structure Type	**38%**	**20%**	**43%**	**100%**	
Tecumseh Share of Total Future County-Wide Housing Supply in Active Development Plans	**2%**	**3%**	**5%**	**3%**	
Essex County	**8,074**	**2,698**	**3,138**	**13,910**	**100%**
Pre-con	3,397	781	1,120	5,298	38%
Final Approval	-	-	-	3,060	22%
Draft Approved	2,199	900	1,318	4,417	32%
Application Received	751	248	136	1,135	8%
Essex County Housing Supply in Active Development Plans by Structure Type	**58%**	**19%**	**23%**	**100%**	

Note: Low density includes singles and semis. Medium density includes townhouses, rowhouses, and apartments in duplexes. High density includes bachelor, 1-bedroom and 2-bedroom + apartments. For the purpose of this study, unbuilt refers to development plans in which a building permit has not yet been issued
Source: Data as of January 2022 from Essex County, summarized by Watson & Associates Economists Ltd.

4.2 Industrial Land Supply Opportunities

The supply and quality of vacant industrial lands (also referred to as employment lands) can have a direct influence on the location of non-residential development as well as the economic competitiveness of the County over the long term. As part of the Phase 1 C.R., a summary of vacant industrial lands has been provided to assist in guiding the amount and location of industrial employment growth over the long term across the County. Based on the most current inventory of urban industrial land provided by each Area Municipality, Essex County has a total of 1,232 gross ha (3,044 gross acres) of vacant, designated industrial land, as outlined in Figure 4-2. Of the total vacant urban industrial land identified within Essex County, approximately 70% is located in the Town of Amherstburg and the Municipality of Leamington.

Figure 4-2
Essex County
Summary of Gross Vacant Urban Industrial Lands (Employment Lands)
by Area Municipality

Area Municipality	Acres	Gross ha	Date of Data
Amherstburg	1,074	435	2018
Essex	52	21	November, 2021
Kingsville	123	50	November, 2021
LaSalle	83	34	November, 2021
Lakeshore	337	136	June, 2022
Leamington	1,043	422	Nov, 2021
Tecumseh	333	135	June, 2022
Essex County Total	**3,044**	**1,232**	

Source: Vacant industrial land inventory provided by Essex County Area Municipalities, 2022.

Chapter 5
County-wide Population, Housing and Employment Forecast and Growth Allocations by Area Municipality, 2021 to 2051

5. County-wide Population, Housing and Employment Forecast and Growth Allocations by Area Municipality, 2021 to 2051

5.1 Introduction

In accordance with the recent demographic, economic and socio-economic trends discussed in Chapters 2 and 3, as well as the anticipated growth drivers/disruptors discussed in this chapter, three long-term population, housing and employment forecasts including a Low, High and Medium Growth Scenario have been prepared for the County to the year 2051. In developing the County's long-term population forecast, consideration has also been given to the long-term demographic and economic outlook for the surrounding market area.

5.2 Regional and Local Economic Growth Drivers and Disruptors

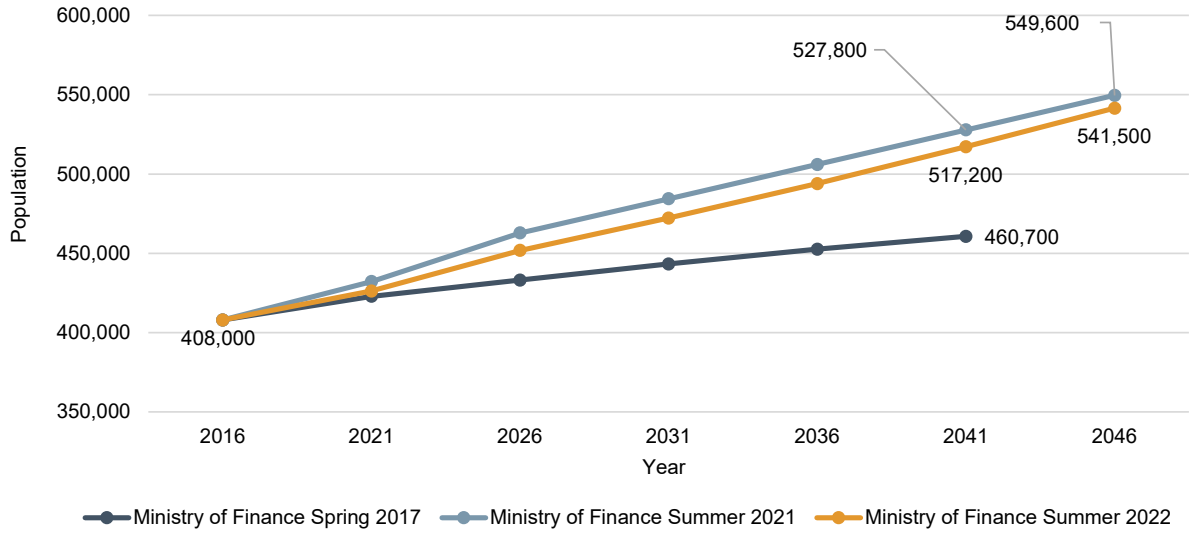
5.2.1 Stronger Regional Population Growth Outlook

Figure 5-1 compares the most recent population projections for the Windsor-Essex Area prepared by the Ministry of Finance (M.O.F.) between 2017 and 2022.[1] Under the most recent 2022 update prepared by the M.O.F., the 2041 population forecast for the Windsor-Essex Area increased to 517,200, which represents an increase of 56,500 compared to the previous M.O.F. forecast prepared in 2017. Over the 2017 to 2021 period, the M.O.F. has consistently projected strong population growth for this area. The most recent 2022 M.O.F. forecast for the Windsor-Essex Area is approximately 8,100 persons lower by 2046 (549,600 versus 541,500, or a reduction of approximately 1.5%), while the 2046 Province-wide forecast has been further increased by an additional 2%. In accordance with the latest 2022 M.O.F. projections, the population growth rate for the 2021 to 2046 period for the Essex Census Division is approximately

[1] Ministry of Finance population projections are provided at the Census Division level. The Essex County Census Division includes Essex County, the City of Windsor and the Township of Pelee. For the purposes of this report, this area is referred to as the Windsor-Essex Area.

1.0%. Comparatively, the population growth rate for the Province of Ontario for this same projection period is 1.3%.

Figure 5-1
Essex Census Division
Ministry of Finance Population Projections, 2016 to 2046



Note: Population includes net Census undercount.
Source: Forecasts adapted from of Ministry of Finance Population Projections, Spring 2017, Spring 2021, and Summer 2022 releases. Figure by Watson & Associates Economists Ltd.

5.2.2 Local and Regional Economic Opportunities

As previously discussed in section 2.3.1, following the 2008/2009 global economic downturn, economic conditions across the Windsor-Sarnia Economic Region and the surrounding commuter-shed have steadily strengthened over the past decade, particularly over the past five years. Furthermore, as previously noted, economic conditions across the Windsor-Sarnia Economic Region have steadily improved since the recent economic downturn in mid-2020 brought on by the COVID-19 pandemic. To a large extent, these regional industrial trends experienced across the Windsor-Sarnia Economic have also been more broadly experienced across Ontario.

The competitiveness of the Essex County export-based economy is largely determined by the availability and quality of its developable employment lands. More specifically, location and market choice of shovel-ready employment lands, potential for future expansion and industrial development feasibility are also key factors in the industrial site selection process. With respect to the broader southern Ontario industrial real estate

market, the supply of vacant serviced employment lands is steadily diminishing within the larger urban centres of the G.T.H.A., including the City of Toronto, City of Vaughan, City of Mississauga, and the City of Brampton. As these more mature areas of the G.T.H.A. gradually build out, increasing outward growth pressure is being placed on other industrial markets across southern Ontario which offer proximity and connectivity to 400-series highways, international airports, synergies with post-secondary institutions, access to U.S. border crossings, opportunities associated with a growing skilled labour force pool and competitive industrial development fees. In comparison to other industrial markets across Canada and the U.S., the Windsor-Essex industrial vacancy rates are low and average prices for serviced industrial land are very competitive (refer to Appendix B). Section 5.3.3 of this report provides further details with respect to the specific assumptions related to employment opportunities related to the planned Stellantis N.V. and L.G. Energy Solution electric vehicle (E.V.) battery manufacturing facility.

The Windsor-Essex Area also offers the following key hard and soft regional infrastructure assets to attract and accommodate future export-based development:

- A strategic location within Canada's major trade corridor which links major urban centres in Ontario and Quebec to the U.S.;
- An international airport within the City of Windsor and proximity to the Detroit Metropolitan Airport located approximately 40 km from the City of Windsor;
- Four post-secondary institutions; including the University of Windsor, St. Clair College, College Boreal and the Schulich School of Medicine and Dentistry (Windsor Campus);
- Access to infrastructure assets such as Highway 401, the Ambassador Bridge, the Detroit-Windsor Tunnel and the Gordie Howe International Bridge, which is anticipated to be completed by 2024. The proposed Gordie Howe International Bridge will provide direct connections to Highway 401 in Ontario and Interstate 75 in Michigan and provide broad economic opportunities by increasing the capacity for trade and investment to this region and more broadly across Canada and the U.S. It is further anticipated that the bridge will benefit local businesses responsible for providing raw materials and services during the construction phase. Permanent jobs will also be created related to the operation and maintenance of the bridge and ports of entry once the bridge is opened;

- Access to a growing skilled labour force pool within the Windsor-Essex Area commuter-shed related to manufacturing, construction, logistics as well as other established and emerging knowledge-based sectors; and
- Designated employment lands and opportunities for future Employment Area expansion along Highway 401, the E.C Row Expressway as well as along other arterial roads and adjacent to the City of Windsor International Airport.

Within the Windsor-Essex Area, Essex County continues to have a strong appeal to both businesses and residents. This appeal is largely attributed to the County's geographic location which offers opportunities for urban and rural living within proximity to retail, wineries, entertainment and other urban amenities, including public and private schools, regional hospitals (including the proposed Windsor-Essex hospital), access to urban indoor and outdoor recreational facilities, as well as access to recreational opportunities within the County's waterfront areas and rural countryside. These attributes make Essex County an attractive destination for residents of all ages, students, and small, mid-sized and large businesses.

Essex County provides competitive opportunities to develop on existing and planned Employment Areas across Essex County, as measured in terms of location/access to major North American employment markets and large population centres, parcel size, price per acre, and development costs, etc. These development characteristics related to the County's planned and future Employment Areas offer the potential for the County to achieve stronger rates of industrial absorption over the long-term planning horizon provided that lands are designated, zoned and serviced in a timely manner.

5.2.3 Continued Viability of the Agricultural Sector

Home to over 1,700 farms and the largest and most intensive greenhouse growing area in Canada, agricultural activities are significant to the overall Essex County economy.[1] The agri-business and food processing sector provides an opportunity to deepen agricultural activity and increase productivity of the industry by providing value-added products and services to the regional economy, including the tourism sector. Over 80% of the land area in Essex County is farmland. Flat terrain, a mild climate, good quality soils and a long growing season all combine to provide a good opportunity for successful and diversified farming activities. Approximately 90% of the land within

[1] Essex County Federation of Agriculture. ECFA

Essex County is considered, by provincial definition, prime agricultural land (specialty crop areas and/or Class 1, 2 and 3 soils in the Canada Land Inventory system). Essex County is the largest and most intensive greenhouse growing area in Canada estimated at approximately 5.5 million square metres (59 million square feet), comprising over 47% of Ontario acreage related to greenhouse operations.

Over the next three decades Essex County is projected to add 15 million square metres (161 million square feet) of greenhouse development activity to its existing base as of 2022. Collectively, this additional greenhouse development activity is anticipated to generate 8,070 new jobs within the agricultural sector, largely within the Municipality of Leamington and, to a lesser extent, within the Town of Kingsville and the Town of Essex. Additional housing opportunities will also be required to accommodate both on-farm and off-farm migrant workers associated with greenhouse development activity (refer to section 5.8 for additional details).

5.2.4 The Impacts of an Aging Essex County Population

Population growth of the 65+ age group across Ontario will continue to be a key driver of housing growth in Essex County over the next 30 years. For the Province of Ontario as a whole, the percentage of the 65+ age group to the total population is projected to increase from 18% in 2021 to 22% in 2046.[1] Essex County is older on average and aging at a slightly faster rate than the Province as a whole. More specifically, the percentage of Essex County's population in the 65+ age group is forecast to increase over the forecast period from 20% in 2021 to 25% in 2051.

Future housing demand across Essex County generated by the 65+ age group is anticipated to remain strong over the next decade driven by the aging of the Baby Boom population. This will generate an increasing need to accommodate a growing number of seniors in housing options that offer a variety of services ranging from independent living to assisted living and full-time care. On the other hand, a growing number of new older adults coming to Essex County will also be seeking housing opportunities that are geared towards active lifestyles and recreation.

[1] Ministry of Finance, Spring 2021 Update, Population Projections for Ontario, 2020-2046, reference scenario.

While strong net migration within the 55+ age group generates considerable economic development opportunities for the broader region, the aging of the County's population base also poses challenges for the County. As previously discussed, the aging of the population and declining population growth resulting from natural increase (i.e., births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within Essex County, and subsequently the regional labour force participation rate over the long term. Similar to the Province as a whole, Essex County will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions.

It is also important to recognize that forecast population growth rates are not anticipated to be homogenous across Essex County's local municipalities and their urban and rural areas. Throughout the County's rural areas, population growth and housing development is anticipated to be relatively limited relative to the urban areas over the next several decades given the availability of developable lots and/or approvals related to new rural lot creation. In certain cases, the aging population base is also anticipated to place increasing development pressures on urban areas. The aging of the County's population is anticipated to drive the need for seniors' housing and other housing forms geared to older adults (e.g., assisted living, affordable housing, adult lifestyle housing) that are not available, or cannot be provided for, in the County's rural areas.

5.2.5 Impacts of Climate Change on Long-term Population Change in the Windsor-Essex Area

Climate change refers to long-term shifts in temperatures and weather patterns. To some extent, these shifts may be natural, such as through variations in the solar cycle. Since the 1800s, however, human activities have been the main driver of climate change, primarily due to the burning of fossil fuels like coal, oil and gas.[1]

One major consequence of climate change is human displacement. Those who are impacted by climate change-induced displacement are often referred to as climate migrants or refugees. Climate change-induced displacement can be both within a country's borders and from one country to another. According to the International

[1] What Is Climate Change? United Nations.

Organization for Migration (IOM), most displacement associated with climate change is internal, temporary, and if people do cross borders, they only move a short distance.[1]

According to the Intergovernmental Panel on Climate Change (IPCC), climate change-induced displacement has been considered a major imminent crisis since the 1990s.[2] Estimates by the World Bank suggest that there will be over 140 million internal climate migrants moving within the borders of countries within Sub-Saharan Africa, South Asia and Latin America, typically from coastal communities.[3] Climate change-induced displacement, both internally and across borders, does not only impact developing countries. Canada has experienced large numbers of internal displacement, which have been more recently studied across western Canada in Alberta and British Columbia.[4]

Predicting long-term trends associated with climate change is difficult and complex. Quantifying the long-term impacts of climate change-induced displacement on net migration to the Windsor-Essex Area is equally challenging. Notwithstanding these challenges, it is reasonable to suggest that climate change-induced displacement could represent a contributor to net-migration levels within the Windsor-Essex Area over the long-term horizon of the County's O.P., from regions more heavily disrupted by climate change both internationally and within Canada. At this time, there are no specific studies that attempt to quantify such impacts; however, organizations such as the British Columbia Council for International Cooperation (B.C.C.I.C.) have begun to raise awareness to address the issue of climate change-induced displacement in Canada.

[1] Climate Change-induced Internal Displacement in Canada: An Analysis. British Columbia Council for International Cooperation. Research Paper. Alea Mohamed. September 2020.

[2] Climate Change-induced Internal Displacement in Canada: An Analysis. British Columbia Council for International Cooperation. Research Paper. Alea Mohamed. September 2020.

[3] The World Bank. Groundswell: Preparing for Internal Climate Migration.

[4] Climate Change-induced Internal Displacement in Canada: An Analysis. British Columbia Council for International Cooperation. Research Paper. Alea Mohamed. September 2020.

5.2.6 Quality of Life

Quality of life is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in relocation decisions. Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences.

As previously discussed, Essex County offers a range of housing opportunities across its Area Municipalities, largely within its Primary Settlement Areas, with access to shopping and urban amenities, arts and culture, recreation and the rural countryside. Attraction efforts must also be linked to housing accommodation, both ownership and rental, municipal services and infrastructure, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments. The County's urban and rural character offers a high quality of life which is expected to drive net migration from a broad range of demographic groups, including children, working age adults and seniors.

5.3 Essex County Long-Term Growth Scenarios – Key Assumptions

Building on the regional economic and demographic assessment prepared in this report, as well as a review of relevant background reports prepared for Essex County and its Area Municipalities over the past decade, a total of three long-term population housing and employment scenarios have been prepared for the County and its Area Municipalities. Each of these scenarios are summarized in this chapter with additional details provided in the Appendices. It is noted that a recommended scenario has not been provided as part of this Phase 1 Report, to allow a detailed assessment of the corresponding urban land requirements for each of the three growth scenarios which will be undertaken as part of the Phase 2 O.P. Review work.. This approach is also intended to provide greater flexibility to each of the County's Area Municipalities regarding the use of these long-term growth scenarios for the purposes of long-range land use planning, infrastructure master plans and municipal service delivery.

The following key growth assumptions inform the Low, Medium and High Growth Scenarios for Essex County from 2021 to 2051. These assumptions are categorized as follows:

- Macro-economic conditions;
- Federal immigration targets;
- Windsor-Essex Regional Area demographic and economic trends; and
- Essex County employment and demographic trends.

5.3.1 Macro-Economic Conditions

As previously discussed, the COVID-19 pandemic had a significant economic impact on the national and provincial economies in 2020 and 2021, as measured in terms of G.D.P. COVID-19 is anticipated to continue to influence the global and national macro-economic outlook over the next several years. Section 2.2.1 provides a detailed discussion regarding forecast G.D.P. annual growth rates for Canada and Ontario. Under the Low Scenario, it is assumed that the provincial economy will underperform, on average, relative to near-term forecasts, while the Medium and High Scenarios, respectively, assume that the provincial G.D.P. growth will generally meet and exceed near-term provincial G.D.P. forecasts over the 2021 to 2051 planning horizon.

5.3.2 National Immigration Trends

Section 2.1.3 of this report provided a discussion regarding federal immigration targets for Canada and Ontario. Under the Low Scenario, it is assumed that national immigration will underperform relative to federal targets over the 2021 to 2051 planning horizon. The Medium Scenario assumes national immigration targets will be met, while the High Scenario assumes that immigration targets will be exceeded. Under each of the long-term growth scenarios it is assumed that the share of total net migration Provincial net migration allocated to Essex County will increase. Refer to Appendix C for summary of the share of Essex County net migration (Medium Growth Scenario) relative to the Province of Ontario in accordance with the M.O.F. 2021 population projections.

5.3.3 Windsor-Essex Regional Area Population and Economic Trends

The following key trends have been assumed for the Windsor-Essex Regional Areas under the three long-term growth scenarios for Essex County:

- Under the Low Scenario, it is forecast that the Windsor-Essex Area population growth will underperform relative to the M.O.F.'s 2022 projections and subsequent M.O.F. population projection updates. Under the Reference Scenario, the Windsor-Essex Area is anticipated to slightly outperform the M.O.F.'s 2022 projections, while under the High Scenario the Windsor-Essex Area is projected to outperform the 2022 M.O.F. projections as well as subsequent provincial projection updates for the area (refer to section 5.2.1).
- Essex County comprised 57% of housing and 56% of population growth in the Windsor-Essex Area from 2001 to 2021. This trend is anticipated to continue to slightly varying degrees over the forecast period under each of the long-term growth scenarios. Under the Medium Growth Scenario it assumed that the share of population growth allocated to Essex County will modestly increase between 2021 and 2051. It is noted that long-term population and employment growth scenarios specifically for the City of Windsor have not been prepared as part this study.[1]
- The Windsor-Essex regional labour force has steadily recovered since the 2008/2009 recession, particularly between 2015 to 2019. The regional economy has strongly rebounded from the impacts of COVID-19, in which labour force levels recently bottomed out in June 2020.
- As previously noted, the Windsor-Sarnia Economic Region unemployment rate is currently near historical lows at 5.6%, while the employed labour force has recently been showing signs of continued strength relative to pre-COVID-19 levels.

[1] It is noted that through this study process City of Windsor planning staff have informed Essex County that they will be commencing population and employment projection work during the fall/winter of 2022/2023, to reflect recent economic development announcements that have been made for the Windsor-Essex Area (i.e. the Stellantis/LG investment). To date, however, there is no specific timeframe from City Staff as to when this additional work will be undertaken.

- The industrial market has also been steadily recovering since the 2008/2009 economic downturn. Competitively priced industrial lands are an attractive aspect for industrial and export-based developers in the Windsor-Essex Area.
- Employment growth in the regional economy represents a key driver of population growth to Essex County. With respect to most recent commuting trends, 51% of Essex County residents work within the County, and 43% work in the City of Windsor (refer to section 2.3.3).
- Steady future economic growth is anticipated across the Windsor-Essex Area, most notably associated with the need for local supply chains to support the planned Stellantis N.V and L.G. Energy Solution (L.G.E.S.) electric vehicle (E.V.) battery manufacturing facility. The joint venture company will invest over $5 billion CAD to establish the facility, which is scheduled to be operational by 2024 and estimated to create approximately 3,200 direct new jobs.[1] An additional 15,000 indirect jobs associated with the regional supply chain are also anticipated to support the planned facility.[2] Furthermore, the facility is also anticipated to generate induced economic impacts associated with the re-spending of labour income (i.e., household spending) throughout the Windsor-Essex Area and beyond.
- Anticipated export-based job growth (i.e., industrial and commercial office jobs) within the Windsor-Essex Area also generates population-related employment to service the needs of the growing employment and population base (e.g., retail, accommodation and food, personal services and institutional services).
- Employment growth comprises two major categories, export-related and community-related employment:
    - Community-related job growth is tied to population growth. These jobs provide services such as retail, entertainment, and hospitality to the community. Under the Low Scenario, lower population growth relative to the other scenarios requires less community-based employment to service the needs of the population. As the population forecast increases under the Medium and High Scenarios, more community-based jobs are required to provide services to the increased population.
    - Export-related jobs are largely industrial based and consist of industries such as manufacturing and logistics. Local factors that can influence

[1] https://www.stellantis.com/en/news/press-releases/2022
[2] BIZ X MAGAZINE: Windsor's EV Battery Plant – Rose City Politics (rcpwindsor.ca)

export-related employment growth within the County include, but are not limited to, price of industrial lands, availability of shovel-ready industrial lands with a broad range of sizes, access to labour force and localized supply-chain opportunities. These local factors are anticipated to influence the share of industrial employment accommodated within Essex County within the broader region under each long-term growth scenario.

5.3.4 Demographic Trends

The following key demographic trends have been assumed under the three long-term growth scenarios for Essex County:

- The Essex County population is aging, driven by the Baby Boomer age group. As previously discussed, the share of population aged 65+ is forecast to sharply increase from 20% in 2021 to 25% in 2051.
- The County's mortality rate is forecast to increase from 2021 to 2051 due to the aging of the population. Additionally, there is downward pressure on births as the population ages. These factors result in a declining natural increase (i.e., births minus deaths), with the natural increase forecast to be progressively negative from 2021 to 2051.
- From 2001 to 2021, Essex County experienced average net migration of 1,200 people annually. Under all growth scenarios, annual net migration is forecast to be considerably higher relative to 2001 to 2021 levels. Progressively higher net migration levels are assumed for the Medium and High Scenarios, relative to the Low Scenario.

Net migration impacts the population age structure. As the existing population ages, Essex County will become increasingly dependent on net migration to maintain its existing share of younger age groups. Under the Low Scenario, the share of population will be older by 2051 due to lower levels of net migration in younger age groups. Under the Medium and High Scenarios, the population age structure is forecast to remain relatively younger due to somewhat higher net migration levels associated with working age residents and their families.

5.4 Essex County Employment Growth Scenarios, 2021 to 2051

Building on the above assumptions, three long-term employment growth scenarios have been developed for Essex County including a Low Scenario, Medium Scenario and a High Scenario, as summarized below in Figure 5-2.

Low Employment Growth Scenario

The Low Scenario assumes that Essex County employment will grow at an average annual rate of 1.3% per year. Under the Low Scenario, the Essex County employment base is forecast to increase steadily between 2021 and 2051 by approximately 35,600 jobs, from 72,300 to 107,900.

Medium Employment Growth Scenario

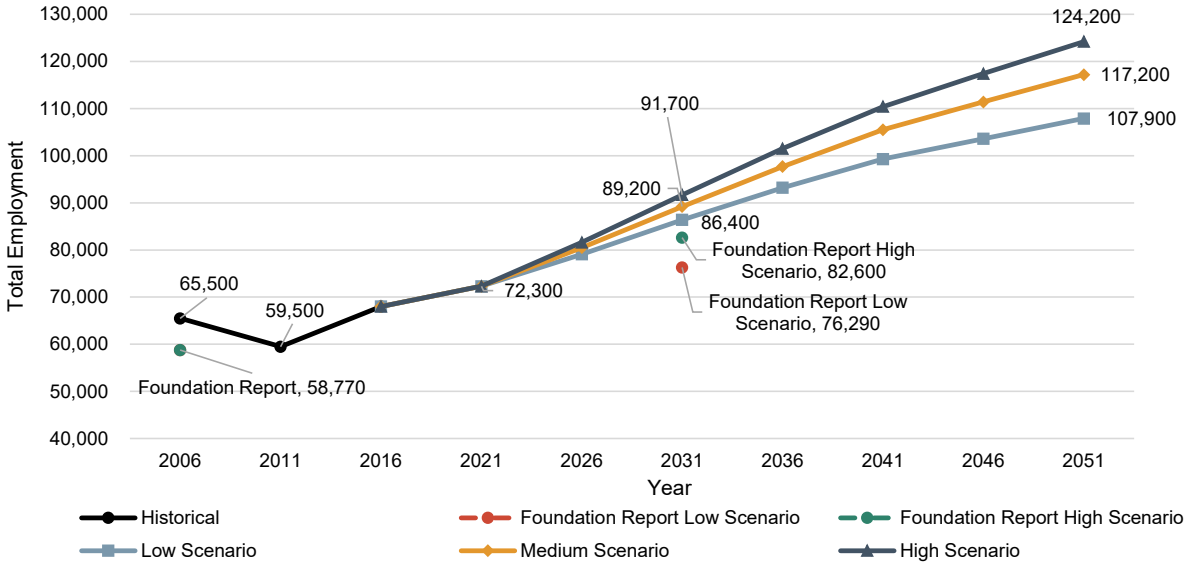
The Medium Scenario assumes an annual growth rate of approximately 1.6% for Essex County between 2021 and 2051. Under the Medium Scenario, the Essex County employment base is expected to increase by approximately 44,900 jobs by 2051, increasing from 72,300 in 2021 to 117,200 by 2051. In comparison to the Foundation Report, the County-wide Medium Employment Growth Scenario is higher by approximately 6,600 jobs than the High Growth Scenario by the year 2031.

High Employment Growth Scenario

Under the High Scenario, Essex County's employment is forecast to grow at an average annual rate of roughly 1.8% per year. Under the High Scenario, Essex County is anticipated to add approximately 51,900 jobs, increasing from 72,300 in 2021 to 124,200 by 2051.

Figure 5-2
Essex County
Long-term Total Employment Forecast Scenarios, 2021 to 2051

graph



Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.
Note: Total employment includes no fixed place of work and work at home employment.

Employment Growth Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	72,300	107,900	35,600	1,200	1.3%
Medium Scenario	72,300	117,200	44,900	1,500	1.6%
High Scenario	72,300	124,200	51,900	1,700	1.8%

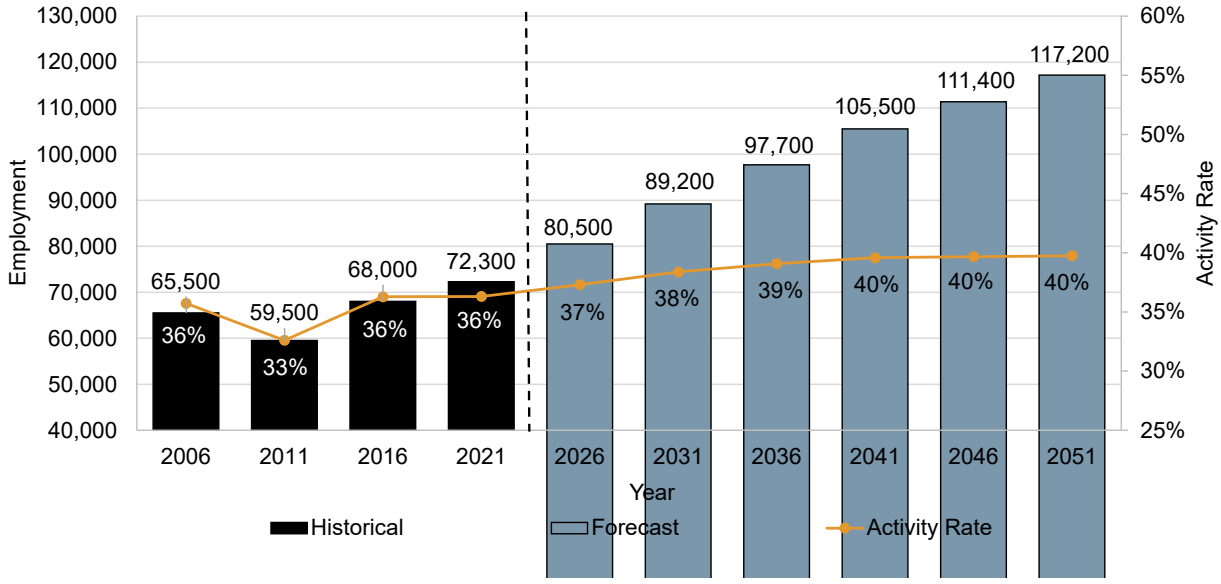
Source: 2021 derived from Statistics Canada Census data and 2051 by Watson & Associates Economists Ltd.

5.5 Overview of Essex County Medium Employment Scenario by Major Sector, 2021 to 2051

The following section provides additional details regarding the Medium Employment Growth Scenario; refer to Appendix F for supplementary information on the Low and High Employment Scenarios for Essex County. Under the Medium Scenario, the

County's employment activity rate (i.e., ratio of jobs to population) is anticipated to steadily increase from approximately 36% in 2021 to 40% by 2051, as summarized in Figure 5-3. This increase to the County's employment activity rate over the short term is anticipated to be driven by local employment opportunities associated within the County's export-based employment sectors (e.g., transportation and logistics, wholesale trade, construction, manufacturing and agri-business). Job growth potential within population-related employment sectors such as retail, accommodation and food, professional, scientific and technical scientific services, and education is also anticipated to drive near-term employment growth fueled by steady population growth. An increasing percentage of forecast job growth is anticipated to be accommodated through home occupations, home-based businesses and off-site employment, which is further discussed below.

Figure 5-3
Essex County
Historical and Forecast Employment Forecast, Medium Scenario, 2021 to 2051



With respect to employment growth by major employment sector, the following observations have been made:

- **Primary Employment** – Primary industries (i.e., agriculture and other resource-based employment) comprised an estimated 9% of the County's employment base (i.e. jobs) as of 2021. As previously mentioned, the County's agricultural

sector draws considerable demand for seasonal workers, which has implications on housing needs within the County's urban and rural areas. This employment sector is anticipated to experience a net employment increase over the 2021 to 2051 forecast period of approximately 8,200 jobs. It is important to note that primary employment is also captured in the work at home and N.F.P.O.W. categories. As such, total employment growth associated with the primary sector is anticipated to be considerably higher than the usual place of work employment numbers identified herein.

- **Industrial Employment** – The County's industrial sector is anticipated to increase by approximately 12,400 jobs over the 2021 to 2051 period, accounting for 28% of total County-wide employment growth. Industrial employment growth is primarily anticipated to be concentrated in sectors related to utilities, small/ medium- and large-scale manufacturing, construction, wholesale trade, transportation and warehousing, utilities and other industrial sectors.
- **Commercial Employment** – Commercial/population-related employment, which includes the office and retail sectors, represents the County's largest major sector with respect to total employment. This sector is largely driven by demand generated from the local population base, including non-permanent residents (i.e., migrant workers). Commercial employment growth is forecast to increase by approximately 11,400 jobs over the 2021 to 2051 period, accounting for 25% of total employment growth.
- **Institutional Employment** – Essex County is anticipated to add approximately 5,000 jobs to its institutional employment sector over the 30-year forecast period, representing 11% of total employment growth. This includes employment growth in education, health and social services and other institutional facilities (i.e., cultural, religious). The County is expected to experience an increase in demand for schools and training centres, public administration, health facilities and social services, including retirement homes, as well as other institutional-related development due to a growing, diversifying and aging population base.
- **Work at Home** – As of 2021, work at home employment is estimated to account for approximately 8% of all jobs within Essex County. Looking forward, continued advances in technology and telecommunications are anticipated to further enable remote work patterns and ultimately increase the relative share of at home and/or off-site employment over the long term. As previously mentioned, demographics and socio-economics also play a role in the future

demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in Essex County will utilize technology to provide or supplement their income in more flexible ways in contrast to traditional work patterns. It is also likely that an increased number of working and semi-retired residents will be seeking lifestyles that will allow them to work from home on a full-time or part-time basis within Essex County as they transition from the workforce to retirement. Over the forecast period, work at home employment in the County is expected to expand by approximately 3,300 jobs (7%), largely driven by forecast employment growth related to knowledge-based occupations as well as primary employment, including diversified on-farm uses.

- **No Fixed Place of Work (N.F.P.O.W.)** – Off-site employment accounted for an estimated 12% of jobs in 2021. This employment category is expected to continue to steadily grow within the County over the long term, largely driven by labour force demands in the construction and transportation, warehousing and business service sectors. Over the forecast period, N.F.P.O.W. employment is expected to expand by approximately 4,700 jobs, 10% of the County's total employment forecast.

5.6 Essex County Long-Term Permanent Population Growth Scenarios, 2021 to 2051

Figure 5-4 graphically compares the three long-term population growth forecasts for the County, including the Low, Medium and High Scenarios. It is noted that the long-term population growth scenarios include an upward adjustment of approximately 3.28% to account for the net Census undercount.[1]

Low Population Growth Scenario

Under the Low Scenario, it is assumed that the Essex County permanent population base will grow at an average annual rate of 1.0% per year. Under the Low Scenario,

[1] The Census undercount represents the net number of permanent residents who are missed (i.e., over-coverage less under-coverage) during Census enumeration in accordance with Statistics Canada. All provincial population forecasts prepared by the Ministry of Finance (M.O.F.) referenced herein include an upward adjustment for the net Census undercount.

the Essex County permanent population is forecast to increase moderately between 2021 and 2051 by 68,900, from 199,100 to 268,000.

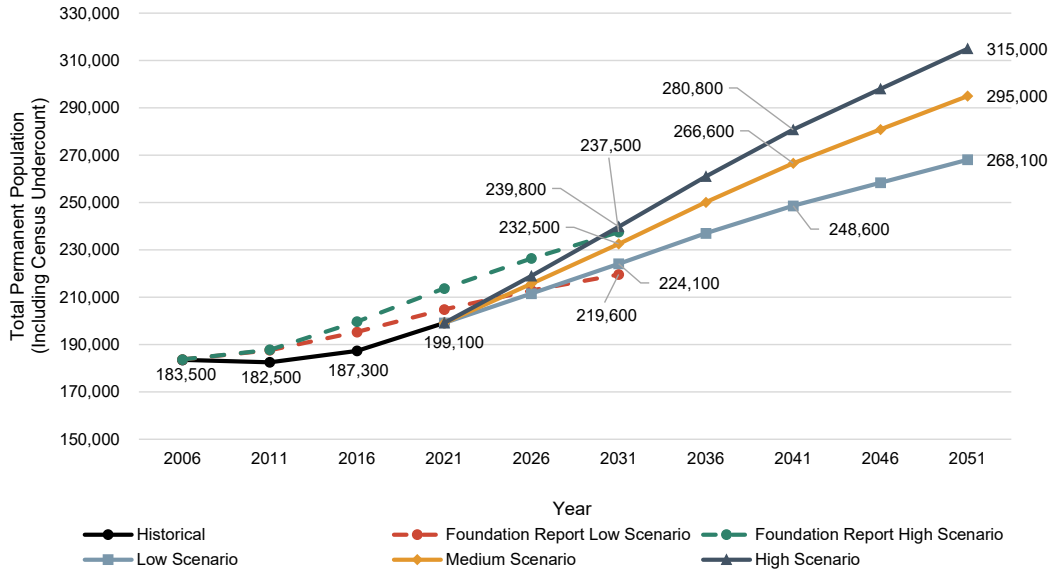
Medium Population Growth Scenario

Essex County's population is forecast to grow at an annual rate of approximately 1.3% under the Medium Scenario. This represents an average annual growth rate that is well above the historical growth rate of 0.7% achieved within Essex County from 2001 to 2021. The population is expected to reach 295,000 by 2051; this represents an increase of approximately 95,900 from 2021. Under this scenario as well as the other two scenarios, the rate of forecast population growth is anticipated to slow marginally in the latter half of the forecast period, due to the aging of the County's population base. In comparison to the previous Foundation Report, the Medium Population Growth Scenario is approximately 2,220 people higher than the previous High Growth Scenario by the year 2031.

High Population Growth Scenario

Under the High Scenario, the County's permanent population is forecast to grow at an average annual rate of 1.5% per year. Under this scenario, the population of Essex County is anticipated to grow by approximately 115,900 persons, increasing from 199,100 in 2021 to 315,000 by 2051.

Figure 5-4
Essex County
Long-term Forecast Population Scenarios, 2021 to 2051



Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.
Note: Population includes net Census undercount.

Population Growth Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	199,100	268,000	68,900	2,300	1.0%
Medium Scenario	199,100	295,000	95,900	3,200	1.3%
High Scenario	199,100	315,000	115,900	3,900	1.5%

Source: 2021 derived from Statistics Canada Census data, and 2051 by Watson & Associates Economists Ltd.

5.6.1 Medium Population and Housing Growth Scenario, 2021 to 2051

Figure 5-5 summarizes the Medium Population Growth Scenario for Essex County from 2021 to 2051 in five-year increments. Additional details are provided in Appendix C, D and E.

Figure 5-5
Essex County
Population Growth Forecast (Medium Scenario), 2021 to 2051

Year		Population (Including Census Undercount)	Population (Excluding Census Undercount)
Historical	*Mid-2006*	183,500	176,700
	Mid-2011	182,500	177,700
	Mid-2016	187,300	181,500
	Mid-2016	187,300	181,500
	Mid-2021	199,100	193,000
Forecast	*Mid-2026*	215,700	209,000
	Mid-2031	232,500	225,300
	Mid-2036	250,100	242,400
	Mid-2041	266,600	258,400
	Mid-2046	280,900	272,300
	Mid-2051	295,000	285,900
Incremental	**Mid-2006 to Mid-2011**	-1,000	11,400
	Mid-2011 to Mid-2016	4,800	3,800
	Mid-2016 to Mid-2021	11,800	11,400
	Mid-2016 to Mid-2021	230,000	223,000
	Mid-2021 to Mid-2026	16,600	16,100
	Mid-2021 to Mid-2031	33,400	32,400
	Mid-2021 to Mid-2036	51,000	49,400
	Mid-2021 to Mid-2041	67,500	65,500
	Mid-2021 to Mid-2046	81,900	79,300
	Mid-2021 to Mid-2051	95,900	93,000

Note: Census undercount estimated at approximately 3.2%.
Population including the undercount has been rounded.
Source: Data from 2006 to 2021 derived from Statistics Canada Census, Forecast by Watson & Associates Economists Ltd., 2022.

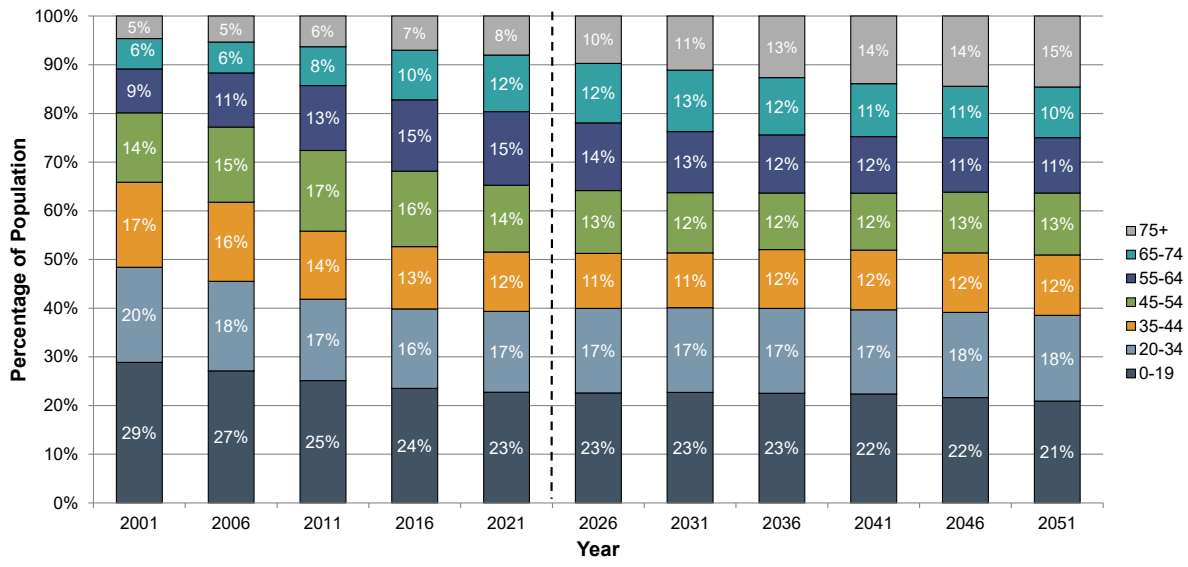
5.6.2 Medium Population Forecast by Age Cohort, 2021 to 2051

Figure 5-6 summarizes the population growth forecast by major age group over the 2021 to 2051 period for Essex County. Key observations are as follows:

- The percentage of population in the 0 to 19 age cohort (youth population) is forecast to gradually decline from 23% in 2021 to 21% in 2051.
- The population share associated with the 20 to 54 age group is forecast to remain relatively stable at 43% from 2021 to 2051.
- The 55 to 74 age group (empty nesters/younger seniors) is forecast to decline from 26% in 2021 to 21% in 2051.

- The percentage of the population in the 75+ age group (older seniors) is forecast to nearly double over the 35-year period, from 8% in 2021 to 15% in 2051. Forecast population growth associated with the 75+ age group will be largely driven by the aging of the existing Baby Boom population within Essex County, and to a lesser extent, through net migration of older residents to the County. This suggests that the strong population growth anticipated within the 75+ age group will still be achieved even if the long-term 2051 population growth scenarios for the County are not fully realized due to lower net migration levels. As previously discussed, the aging of the County's population is anticipated to place increasing demand on the need for seniors' housing, affordable housing, as well as community and social services throughout Essex County.

Figure 5-6
Essex County
Population by Age Forecast (Medium Scenario), 2021 to 2051



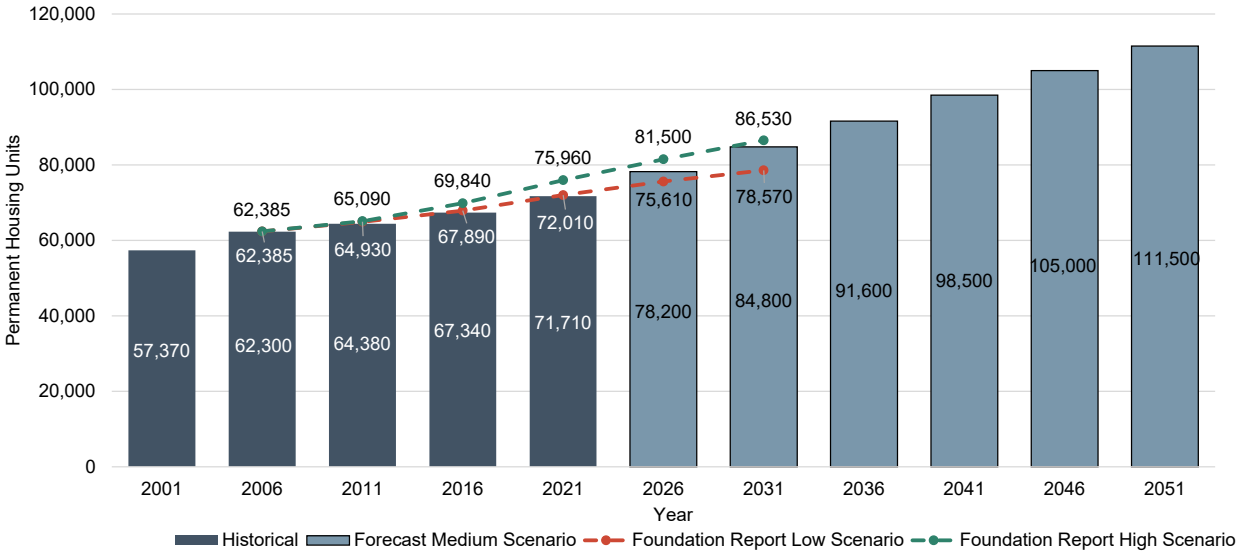
Source: Historical derived from 2001 to 2021 Statistics Canada Census and Demography Division data, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

5.7 Essex County Medium Housing Growth Scenario, 2021 to 2051

Figure 5-7 summarizes the Essex County household forecast from 2021 to 2051 under the Medium Growth Scenario. Housing trends between 2001 and 2021 are also provided for historical context. Additional details regarding the Low and High Housing Growth Scenarios are provided in Appendix E. As illustrated in Figure 5-8, the Medium Housing Growth Scenario is projected to reach approximately 84,800 households by 2031, which is slightly below the High Housing Scenario provided in the 2011 Foundation Report. By 2051, the County's housing base is forecast to increase to 108,700 households from 71,400 in 2021 under the Medium Housing Growth Scenario. This represents an increase of approximately 1,240 households, or an annual housing growth rate of 1.4% per year. Comparatively, this rate of forecast housing growth is well above the historical 20-year (i.e., 2001 to 2021) period, which experienced an annual average housing growth rate for the County of 1.1%.[1] It is important to note that the County-wide housing forecast includes both on-farm and off-farm households associated with migrant workers within the Municipality of Leamington, Town of Kingsville and Town of Essex. Further details regarding housing needs associated with migrant workers are provided in section 5.8.2.[2]

[1] In accordance with Statistics Canada Census data from 2001 to 2021.
[2] Forecast housing needs associated with migrant workers are summarized as equivalent low-density households.

Figure 5-7
Essex County
Household Forecast (Medium Scenario), 2021 to 2051

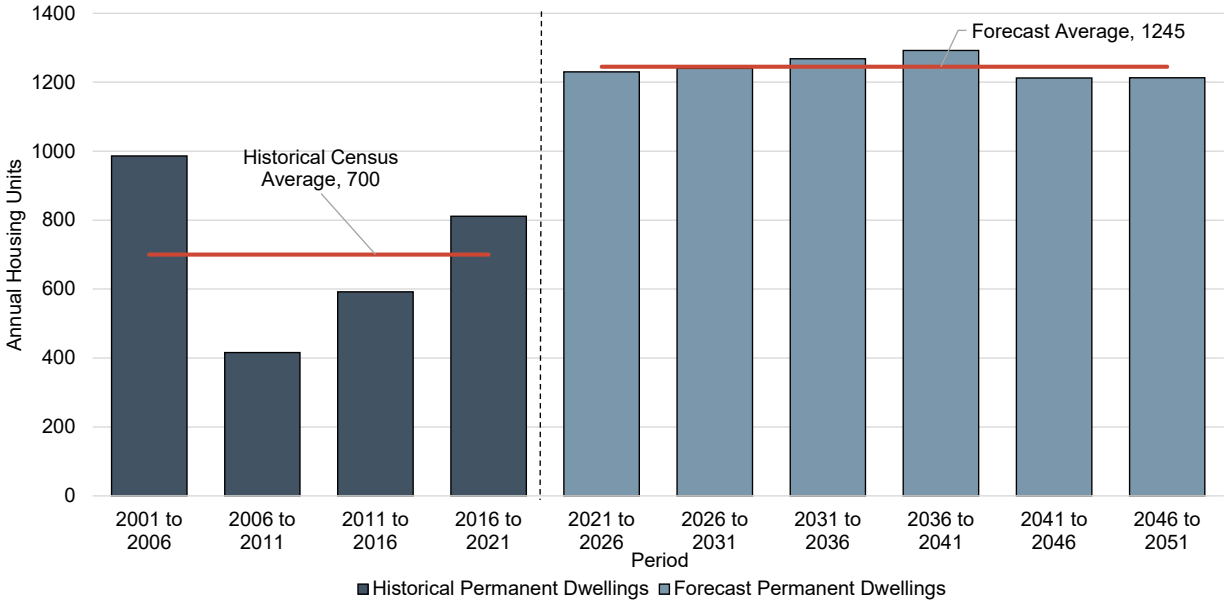


Source: Historical from Statistics Canada Census 2001 to 2021. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
Forecast by Watson & Associates Economists Ltd.

Figure 5-8 summarizes historical and forecast housing growth for the County in five-year increments from 2001 to 2051 under the Medium Housing Growth Scenario. The following trends can be observed:

- From 2001 to 2021, historical housing development averaged 700 households annually.
- Between 2016 and 2021, Census households within Essex County increased to an average rate of 810 households per year. Comparatively, between 2016 and 2021, residential building permits issued associated with new dwellings averaged 1,130 per year. This suggests that a large share of new dwellings constructed within the past couple of years have not yet been captured in the 2021 Census housing data.
- Between 2021 and 2051, forecast housing development is expected to average 1,245 units annually.

Figure 5-8
Essex County
Historical and Forecast Households Incremental Growth (Medium Scenario), 2021 to 2051



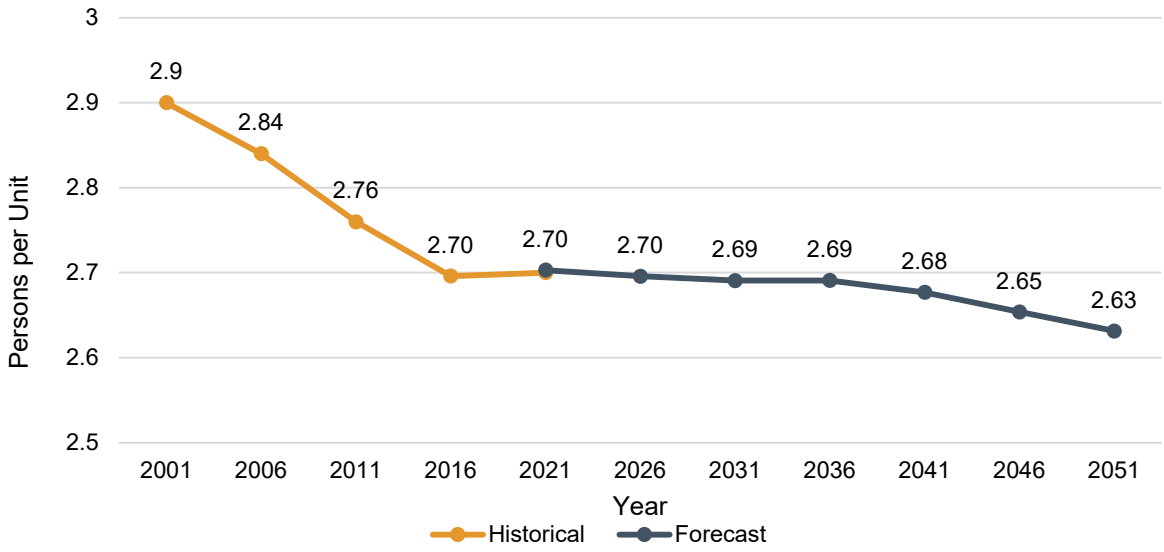
Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ in apartments.
Source: 2001 to 2021 Derived from Statistics Canada Census data. Forecast by Watson & Associates Economists.

Figure 5-9 summarizes anticipated trends in long-term housing occupancy, or average P.P.U., for Essex County from 2021 to 2051 under the Medium Growth Scenario. Key observations include the following:

- Between 2001 and 2021, the average P.P.U. for Essex County declined from 2.90 to 2.70.
- Over the forecast period, the average P.P.U. for Essex County is anticipated to continue to gradually decline from 2.70 in 2021 to 2.63 in 2051, largely as a result of the aging of the County's population combined with a gradual increase in Census non-family households.[1] [2]

[1] It is noted that 2021 average P.P.U. levels may be temporarily inflated resulting from impacts associated with COVID-19.
[2] Census non-family households refer to household members who do not belong to a Census family (e.g., unrelated room-mate).

Figure 5-9
Essex County
Forecast Population Per Unit (Medium Scenario), 2021 to 2051



Note: Population used to calculate persons per unit does not include the net Census undercount.
Source: 2001 to 2021 derived from Statistics Canada Census, forecast by Watson & Associates Economists Ltd. 2022.

5.7.1 Forecast Households by Dwelling Type

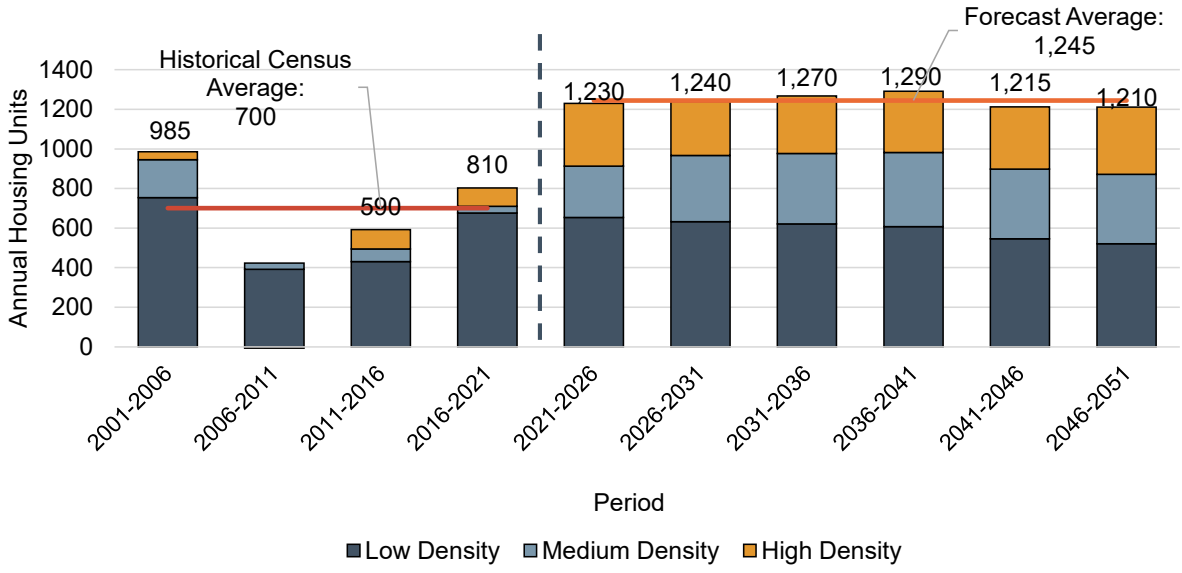
Figure 5-10 summarizes Essex County's housing forecast by structure type, including low-density (single and semi-detached dwellings), medium-density (duplexes and townhomes) and high-density housing (apartments), over the 2021 to 2051 forecast period in five-year growth increments. Collective dwellings are incorporated into the overall Essex County population and housing forecast but are not displayed in

Figure 5-10.[1] Key observations include the following:

- New residential development within Essex County is anticipated to largely comprise grade-related housing. Over the long term, however, housing demand is anticipated to gradually shift away from single/semi-detached dwellings towards townhomes as well as low and mid-rise apartment housing, largely driven by declining housing affordability and increased demand associated with with the County seniors population. The County's 65+ population is forecast to increase at approximately double the rate of the County's total population.
- This shift in the share of medium- and high-density housing forms such as townhouses and apartments is anticipated to be more pronounced in the County's urban areas associated with the stronger market demand and available infrastructure to support residential intensification and higher density housing forms in these areas.
- Over the 2021 to 2051 forecast period, new housing development is projected to comprise 48% low-density (singles and semi-detached), 27% medium-density (townhouses) and 25% high-density (apartment) units.

[1] An additional component of the Census population is the non-household population. The household population relates to persons who are part of a household, whereas the non-household population relates to persons who are residents of collective dwellings. According to Statistics Canada, a collective dwelling refers to a dwelling of a commercial, institutional, or communal nature. Included in this type of dwelling are lodging or rooming houses, hotels, motels, tourist homes, nursing homes, hospitals, staff residences, communal quarters (military bases), work camps, jails, missions and group homes. Collective dwellings may be occupied by usual residents or solely by foreign and/or temporary residents. Population in collective dwellings is expected to increase over time largely as a result of the aging population.

Figure 5-10
Essex County
Forecast Households by Structure Type, 2021 to 2051



Note: Low Density includes singles and semis.
Medium density includes townhouses and apartments in duplexes.
High Density includes stacked townhouses, bachelor, 1-bedroom and 2-bedroom+ apartments in a building that has fewer or more than 5 storeys.
Source: 2001 to 2021 from Statistics Canada Census 2001-2021. Forecast by Watson & Associates Economists Ltd.

5.8 Allocation of Population, Housing and Employment Growth Forecasts by Area Municipality

5.8.1 Growth Forecast Approach and Key Assumptions

The population and housing allocations by Area Municipality under each option 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 approvals process by housing structure type, approval status and location;
- Current inventory of net vacant designated urban "greenfield" lands not currently in the development approvals process;

- Supply of designated vacant Employment Area lands by Area Municipality;
- Consideration with respect to municipal water and wastewater servicing capacity and potential long-term solutions to overcome constraints (where identified) based on discussions with County and Area Municipal staff; and
- Provincial, County and Area Municipal policy direction regarding forecast residential growth by urban and rural area.

Demand Factors:

- Historical population, housing and employment trends based on 2001 to 2021 Statistics Canada (Census) data and by Area Municipality;
- A review of recent residential and non-residential building permit data by housing structure type and employment sector by Area Municipality;
- Historical commuting trends and anticipated employment growth opportunities within the surrounding market area;
- A review of local employment opportunities by sector; and
- Housing market demand for by local municipality across all major demographic groups including young adults, new families, move-up buyers and empty nesters/seniors.

While forecast population and housing growth rates vary significantly by geographic area, each of the Area Municipalities within Essex County share a number of relatively common attributes with respect to long-term residential development and demographic trends, including:

- All of the Area Municipalities within Essex County are anticipated to experience higher levels of annual population and housing growth over the 2021 to 2051 forecast period relative to the past 20 years. Under each of the long-term range growth scenarios, the share of population and employment growth by Area Municipality is anticipated to remain relatively consistent.
- As previously noted in section 3.2.2., higher levels of immigration and inter-provincial net-migration, were observed for the Windsor-Essex Area as a whole between 2016 and 2021, when compared to previous Census periods. Strong immigration levels and strengthening net-migration during this time period was largely driven by competitively priced housing options across the Windsor-Essex Area relative to other larger urban centres across Ontario, combined with the

gradual recovery of the regional economy since the 2008/2009 global economic recession. During this time period, residential growth rates were stronger within Essex County relative to the City of Windsor. Population growth related to non-permanent residents (N.P.R.) has also a key driver of population growth and housing need, most notably in the Municipality of Leamington associated with on-site and off-site/ farm workers.

- While COVID-19 has been disruptive to the local economy, particularly in retail, accommodation and food and tourism-based sectors, it has been a key driver of accelerated residential development activity as well as housing price appreciation experienced across the County over the past two years for all Area Municipalities.
- Looking forward over next five to 10 years, housing demand across all the County's Area Municipalities is anticipated to remain strong relative to recent historical levels, largely fueled by continued outward growth pressure from the G.G.H. as well as continued local employment opportunities, particularly within the County's growing export-based economy. Continued housing appreciation and declining housing affordability, combined with a range of broader economic headwinds, including tightening monetary policy (i.e. rising interest rates and quantitative tightening), persistently high inflation rates, rising household debt and increased geo-political uncertainty are anticipated to moderate housing demand (particularly ownership housing) in the near-term relative to recent historical trends over the past two to three years.
- Over the longer-term (i.e. 10+ years), while annual housing demand is anticipated to remain strong relative to historical trends over the past two decades, the average rate of annual housing development is anticipated to gradually slow across all Area Municipalities driven by slower regional and provincial economic growth associated with an aging population and labour force.
- Future housing growth is anticipated across a diverse range of housing forms. Increased market demand, however, is anticipated over the next three decades for higher density housing options such as townhouses and apartments as the local and regional population base continues to grow, age and diversify. As previously noted, declining housing affordability also represents a key driver of a portion of townhouse and apartment housing forms.
- Average housing occupancy levels are forecast to decline over the long-term forecast period for all Area Municipalities. This demographic trend is largely

associated with the aging of the County's population base associated with Baby Boomers and Millennials.

- The share of future housing demand is anticipated to continue increase in the County's urban areas largely driven by new families in search of competitively priced, ground-oriented housing located within proximity to local urban amenities (i.e. schools, retail, personal service uses) and surrounding employment markets.
- Housing demands from the 55-74 age group (empty nester/younger seniors) and the 75+ age group (older seniors) are also anticipated to drive the future need for urban housing across all Area Municipalities in Essex County. As previously noted, housing demand associated with older seniors (75+), is largely anticipated from the existing population base, and to a lesser extent through net migration.

5.8.2 Summary of Long-Term Population, Housing and Employment Growth Forecasts by Area Municipality

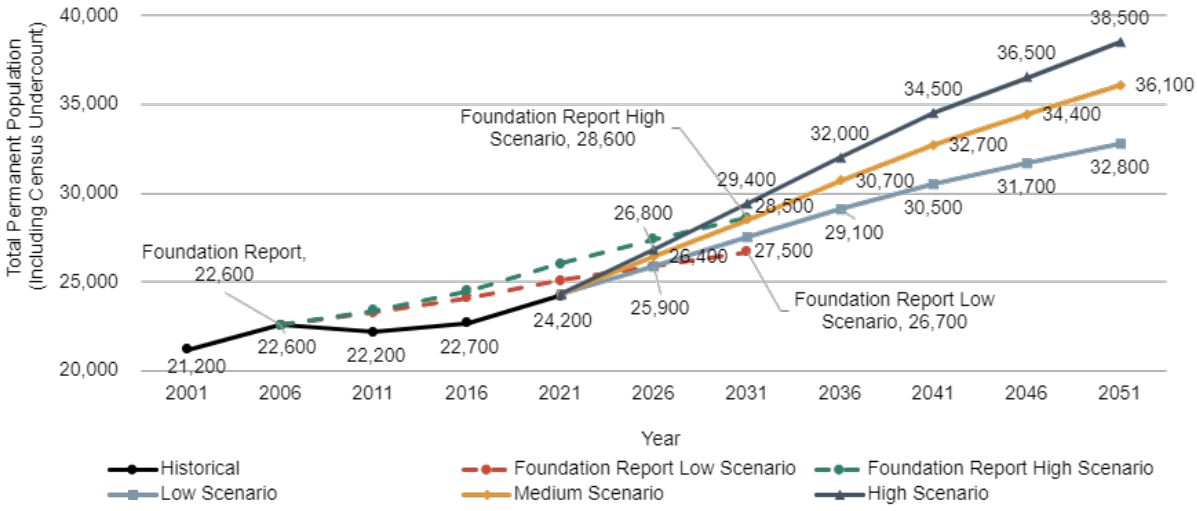
Figures 5-12 through Figure 5-51 provide a summary of the population housing and employment growth scenarios to 2051 by Area Municipality. Appendix G includes further details regarding population, housing by structure type and employment by sector in five-year increments from 2021 to 2051.

Town of Amherstburg

- The Town of Amherstburg existing population and employment base as of 2021 comprises 12% and 8%, respectively of County-wide residents and jobs.
- As summarized in Figure 5-12, the population of Amherstburg is anticipated to reach between 32,800 and 38,500 persons by 2051, accommodating approximately 12% of the County's population growth over the forecast horizon under the Medium Scenario.
- The population of Amherstburg is anticipated to grow at an annual rate between 1.0% and 1.5%, which is significantly higher than the growth rate observed over the most recent 20-year Census period of 0.7% annually.
- As summarized in Figure 5-13, the employment base of Amherstburg is anticipated to reach between 8,500 and 10,000 jobs by 2051, accommodating approximately 8% of the County's employment growth over the forecast horizon under the Medium Scenario.

- The employment base of Amherstburg is anticipated to grow at an annual rate of 1.4% to 2.0 %, which is significantly higher than the employment growth rate observed between 2006 and 2021, estimated at 0.6% annually.
- Amherstburg has experienced a significant increase in residential building permit activity (new units only) over the past five years compared to previous periods over the past 15 years. Forecast levels of housing growth over the next 30 years are anticipated to remain well above the historical long-term average over the past 15 years.
- As summarized in Figures 5-13 and 5-14, it is anticipated that Amherstburg will add approximately 4,300 housing or approximately 140 units annually over the forecast horizon under the Medium Scenario, which represents an increase of approximately 40% when compared to annual residential building permit activity (new units only) issued over the past 15 years recent (101 housing units annually). Under the Low and High Scenario, the Town of Amherstburg is forecast to average between 110 and 160 total households per year over the next 30 years.

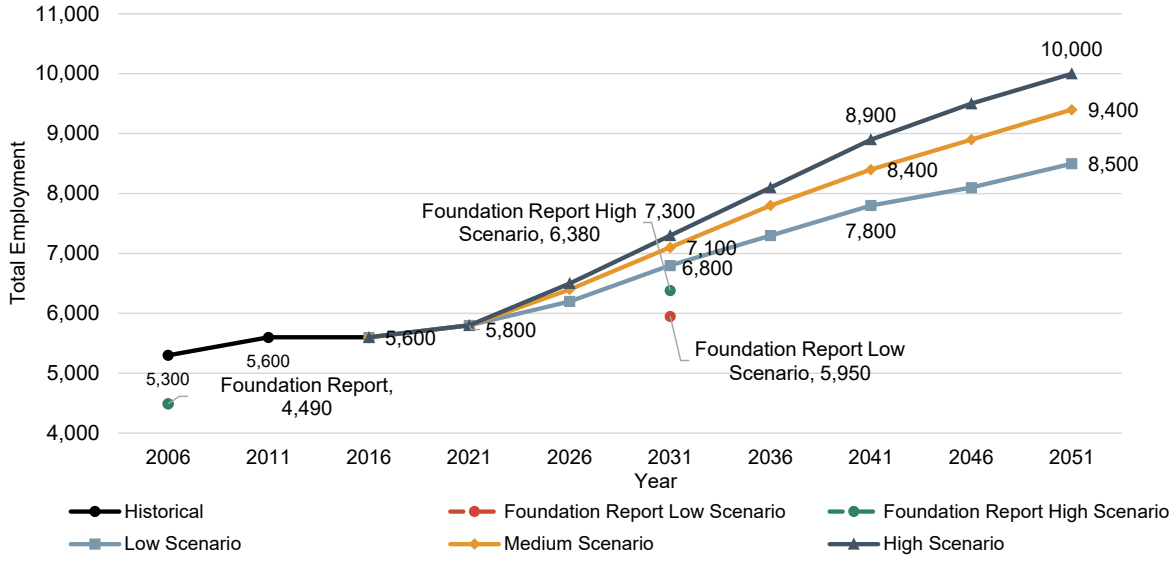
Figure 5-12
Town of Amherstburg
Long-term Forecast Population Scenarios, 2021 to 2051



Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	24,200	32,800	8,500	280	1.0%
Medium Scenario	24,200	36,100	11,800	390	1.3%
High Scenario	24,200	38,500	14,200	470	1.5%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-13
Town of Amherstburg
Long-term Forecast Employment Forecast Scenarios, 2021 to 2051

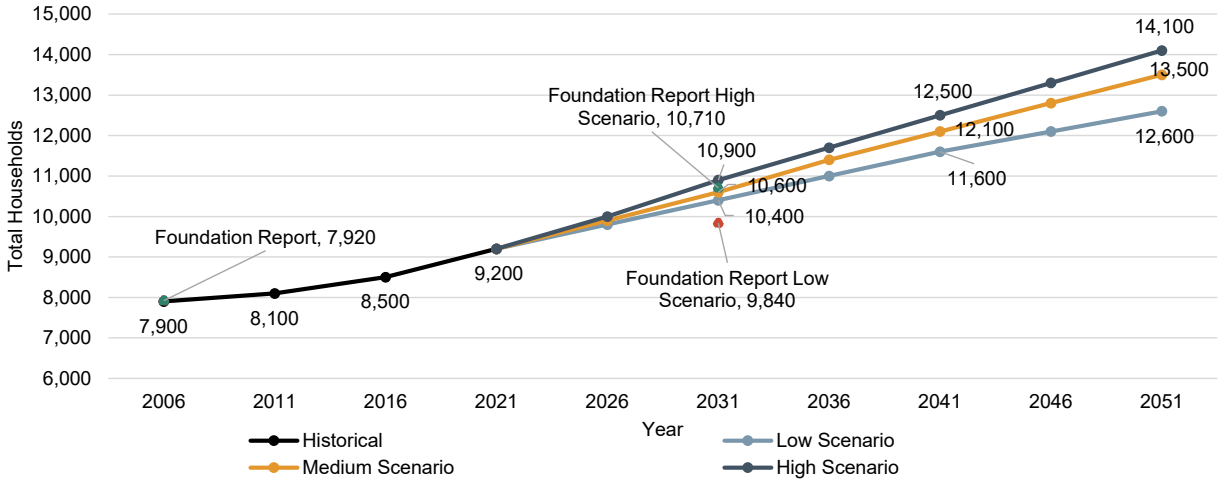


Note: Total employment includes no fixed place of work and work at home employment.
Source: Historical from Statistics Canada Census 2006 to 2016. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	5,600	8,500	2,900	100	1.4%
Medium Scenario	5,600	9,400	3,800	130	1.7%
High Scenario	5,600	10,000	4,400	150	2.0%

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated by Watson & Associates Economists Ltd. Forecast by Watson & Associates Economists Ltd.

Figure 5-14
Town of Amherstburg
Long-term Forecast Housing Scenarios, 2021 to 2051

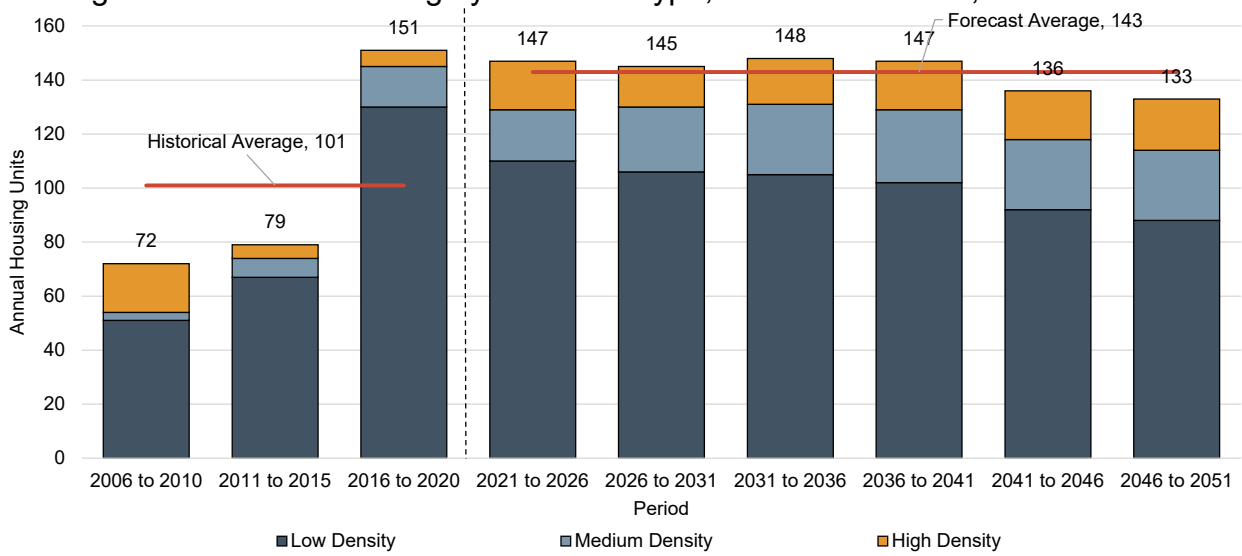


Note: Population includes net Census undercount.
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	9,200	12,600	3,400	110	1.1%
Medium Scenario	9,200	13,500	4,300	140	1.3%
High Scenario	9,200	14,100	4,900	160	1.4%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-15
Town of Amherstburg
Long-term Forecast Housing by Structure Type, Medium Scenario, 2021 to 2051



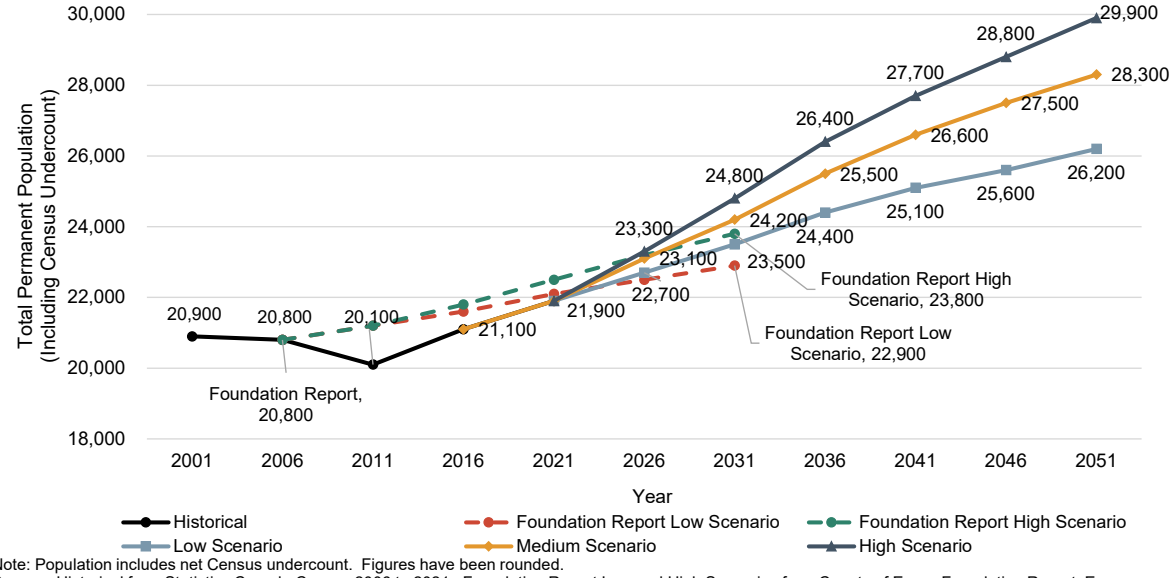
Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Building Permit data 2006 to 2020 (new units only). Forecast by Watson & Associates Economists Ltd.

Town of Essex

- The Town of Essex existing population and employment base as of 2021 comprises of 11% and 10%, respectively of County-wide residents and jobs.
- As summarized in Figure 5-16, the population of Essex is anticipated to reach between 26,200 to 29,900 persons by 2051, accommodating approximately 7% of the County's population growth over the forecast horizon under the Medium Scenario.
- The population of Essex is anticipated to grow at an annual rate of 0.6% to 1.0%, which is significantly higher than the growth rate observed over the most recent 20-year Census period of 0.2% annually.
- As summarized in Figure 5-17, the employment base of Essex is anticipated to reach between 9,700 and 11,100 jobs by 2051, accommodating approximately 8% of the County's employment growth over the forecast horizon under the Medium Scenario.
- The employment base of Essex is anticipated to grow at an annual rate of 1.2% to 1.7 %, which is significantly higher than the employment growth rate observed between 2006 and 2021, estimated at -0.2% annually.

- The Town of Essex has experienced a steady increase in residential building permit activity (new units only) over the past five years compared to previous periods over the past 15 years. Forecast levels of housing growth over the next 30 years are anticipated to remain well above the historical long-term average over the past 15 years.
- As summarized in Figure 5-18 and Figure 5-19, it is anticipated that Essex will add 2,400 housing or 80 units annually over the forecast horizon under the Medium Scenario, which represents an increase of just under 30% when compared to annual residential building permit activity (new units only) issued over the past 15 years recent (63 housing units annually). Under the Low and High Growth Scenario, the Town of Essex is forecast to average between 60 and 90 total households per year over the next 30 years.
- Of the total annual housing forecast, approximately 12% are comprised of on-farm/off-farm migrant workers.

Figure 5-16
Town of Essex
Long-term Forecast Population Scenarios, 2021 to 2051

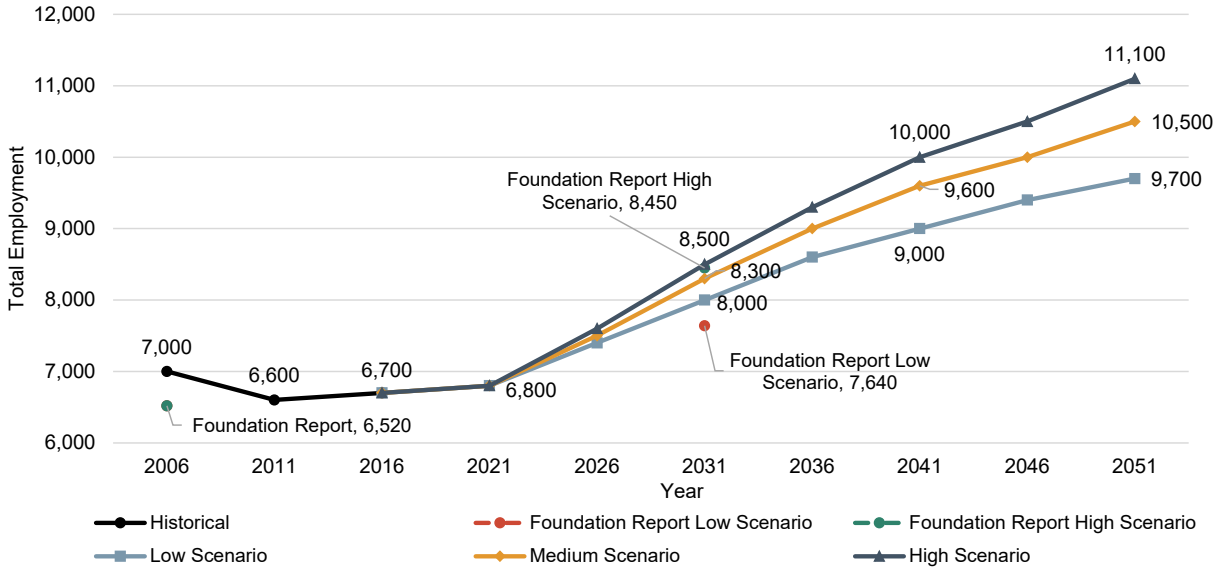


Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical from Statistics Canada Census 2006 to 2021. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	21,900	26,200	4,300	140	0.6%
Medium Scenario	21,900	28,300	6,400	210	0.9%
High Scenario	21,900	29,900	8,000	270	1.0%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-17
Town of Essex
Long-term Forecast Employment Forecast Scenarios, 2021 to 2051

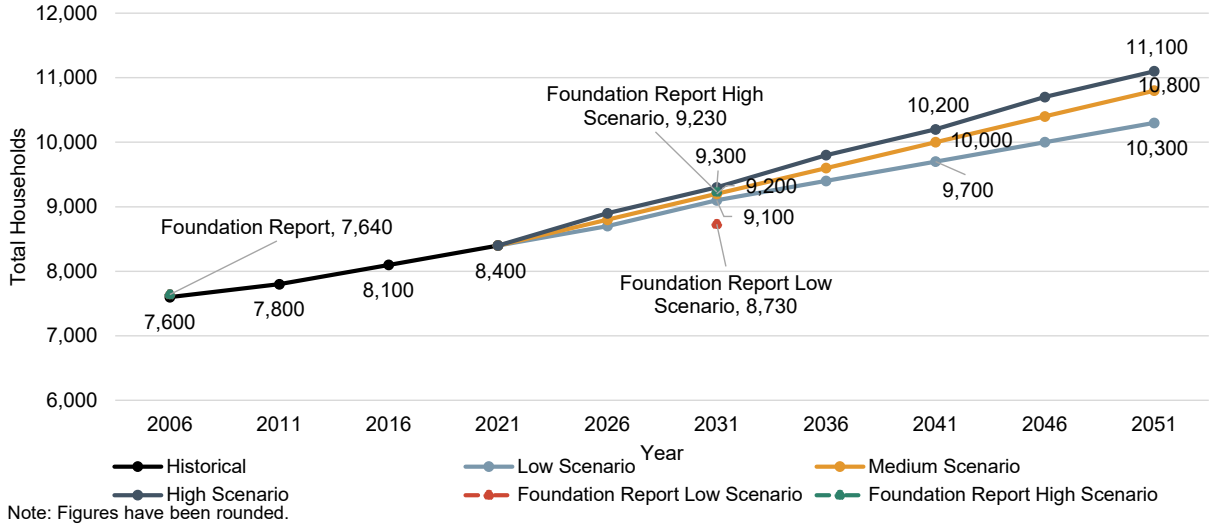


Note: Total employment includes no fixed place of work and work at home employment
Source: Historical from Statistics Canada Census 2006 to 2016. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	6,700	9,700	3,000	100	1.2%
Medium Scenario	6,700	10,500	3,800	130	1.5%
High Scenario	6,700	11,100	4,400	150	1.7%

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated by Watson & Associates Economists Ltd. Forecast by Watson & Associates Economists Ltd.

Figure 5-18
Town of Essex
Long-term Forecast Housing Scenarios. 2021 to 2051

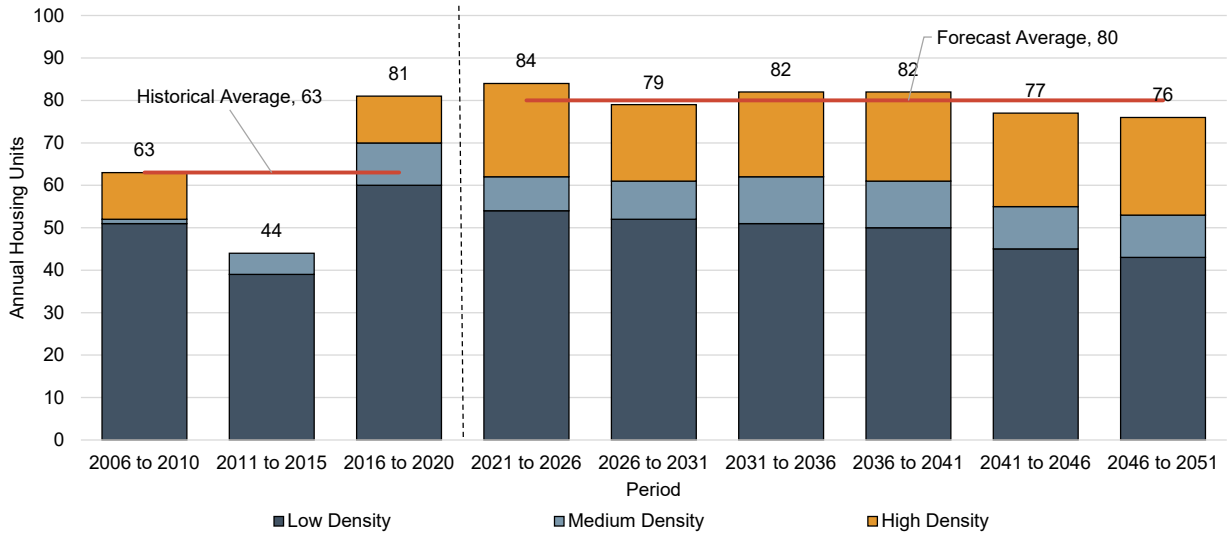


Note: Figures have been rounded.
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	8,400	10,300	1,900	60	0.7%
Medium Scenario	8,400	10,800	2,400	80	0.8%
High Scenario	8,400	11,100	2,700	90	0.9%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-19
Town of Essex
Long-term Forecast Housing by Structure Type, Medium Scenario, 2021 to 2051



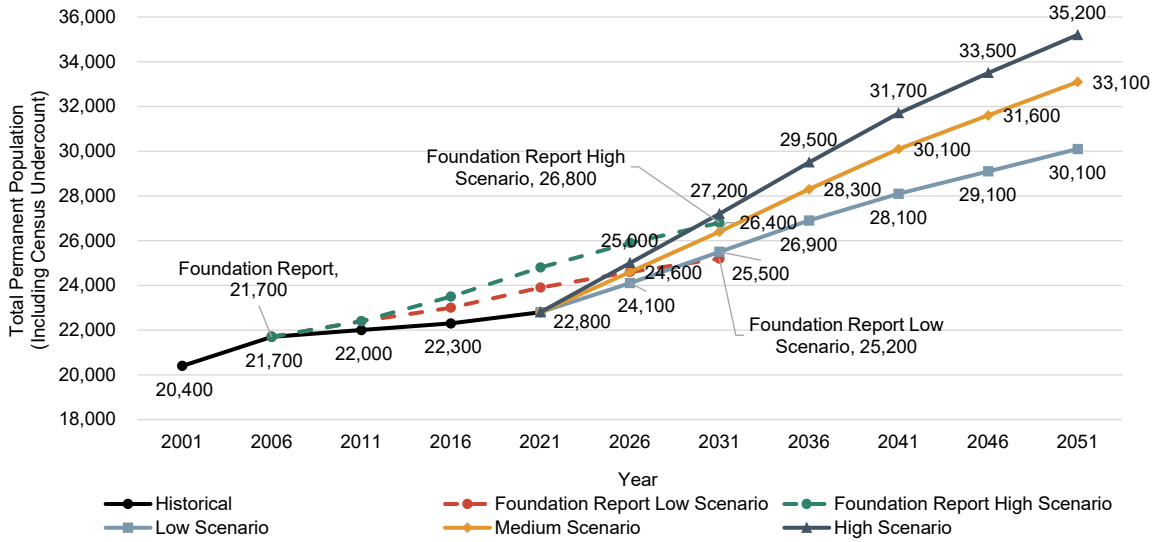
Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Building Permit data 2006 to 2020 (new units only). Forecast by Watson & Associates Economists Ltd.

Town of Kingsville

- The Town of Kingsville existing population and employment base as of 2021 comprises approximately 12% and 10% of County-wide residents and jobs, respectively.
- As summarized in Figure 5-20 and 5-21, the population of Kingsville is anticipated to reach between 30,100 and 35,200 persons by 2051, accommodating approximately 11% of County-wide population growth over the forecast horizon under the Medium Scenario.
- The population of Kingsville is anticipated to grow at an annual rate between 0.9% and 1.5%, which is significantly higher than the growth rate observed over the most recent 20-year Census period of 0.6% annually.
- As summarized in Figure 5-21, the employment base of Kingsville is anticipated to reach between 10,900 and 12,400 jobs by 2051, accommodating approximately 10% of the County's employment growth over the forecast horizon under the Medium Scenario.

- The employment base of Kingsville is anticipated to grow at an annual rate of 1.3% to 1.7 %, which is significantly higher than the employment growth rate observed between 2006 and 2021, estimated at 0% annually.
- The Town of Kingsville has experienced a steady increase in residential building permit activity (new units only) over the past five years compared to previous periods over the past 15 years. Forecast levels of housing growth over the next 30 years are anticipated to remain approximately 25% above the historical long-term average over the past 15 years.
- As summarized in Figure 5-22 and Figure 5-23, it is anticipated that Kingsville will add 3,800 housing or 130 units annually over the forecast horizon under the Medium Scenario, which represents an increase of just under 50% when compared to annual residential building permit activity (new units only) issued over the past 15 years recent (102 housing units annually). Under the Low and High Growth Scenario, the Town of Kingsville is forecast to average between 100 to 150 total households per year over the next 30 years.
- Of the total annual housing forecast, approximately 9% are comprised of on-farm/off-farm migrant workers.

Figure 5-20
Town of Kingsville
Long-term Forecast Population Scenarios, 2021 to 2051

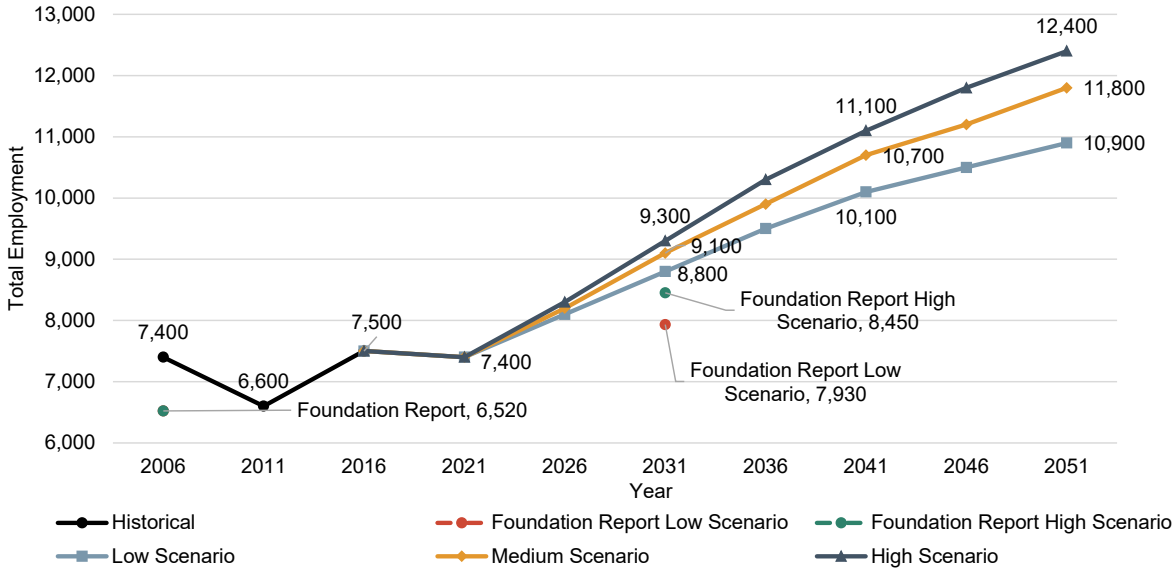


Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical from Statistics Canada Census 2006 to 2021. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	22,800	30,100	7,300	240	0.9%
Medium Scenario	22,800	33,100	10,300	340	1.3%
High Scenario	22,800	35,200	12,400	410	1.5%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-21
Town of Kingsville
Long-term Forecast Employment Forecast Scenarios, 2021 to 2051

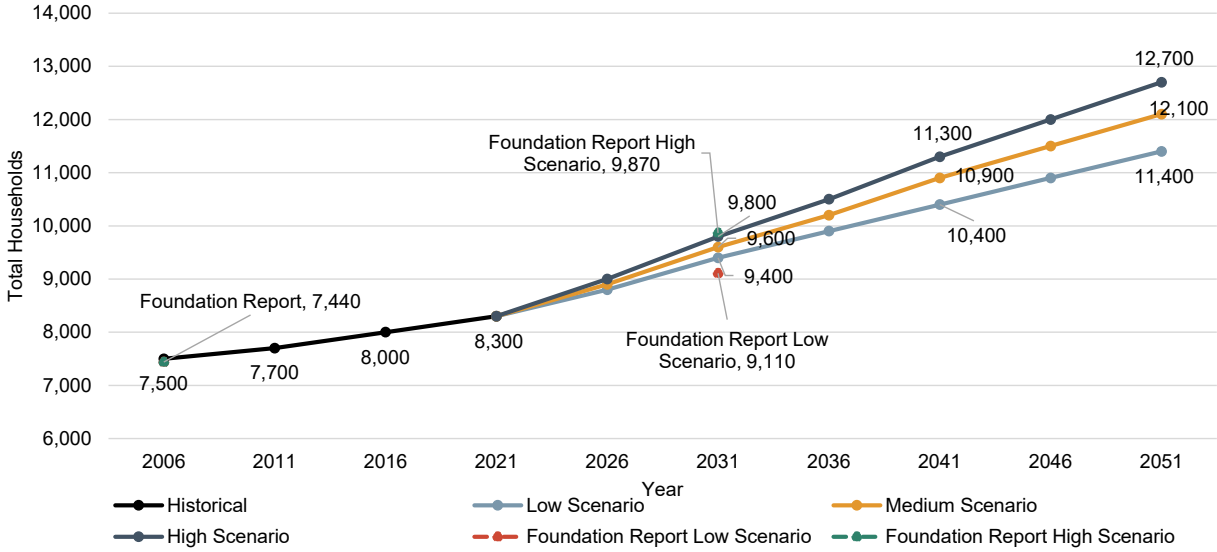


Note: Total employment includes no fixed place of work and work at home employment.
Source: Historical from Statistics Canada Census 2006 to 2016. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	7,500	10,900	3,400	110	1.3%
Medium Scenario	7,500	11,800	4,300	140	1.5%
High Scenario	7,500	12,400	4,900	160	1.7%

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated by Watson & Associates Economists Ltd. Forecast by Watson & Associates Economists Ltd.

Figure 5-22
Town of Kingsville
Long-term Forecast Housing Scenarios. 2021 to 2051

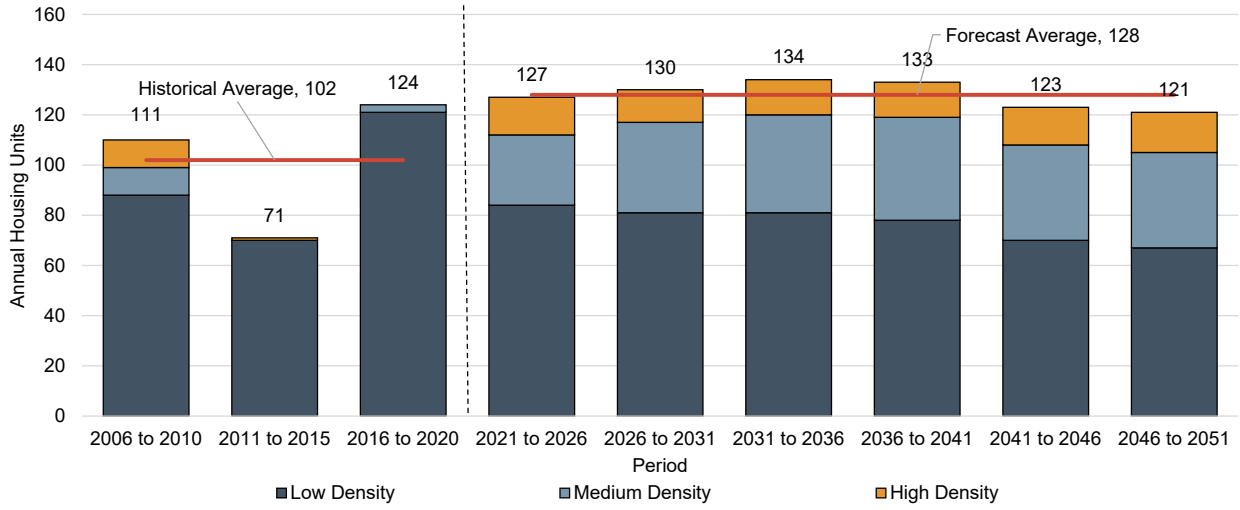


Note: Figures have been rounded.
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	8,300	11,400	3,100	100	1.1%
Medium Scenario	8,300	12,100	3,800	130	1.3%
High Scenario	8,300	12,700	4,400	150	1.4%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-23
Town of Kingsville
Long-term Forecast Housing by Structure Type, Medium Scenario, 2021 to 2051



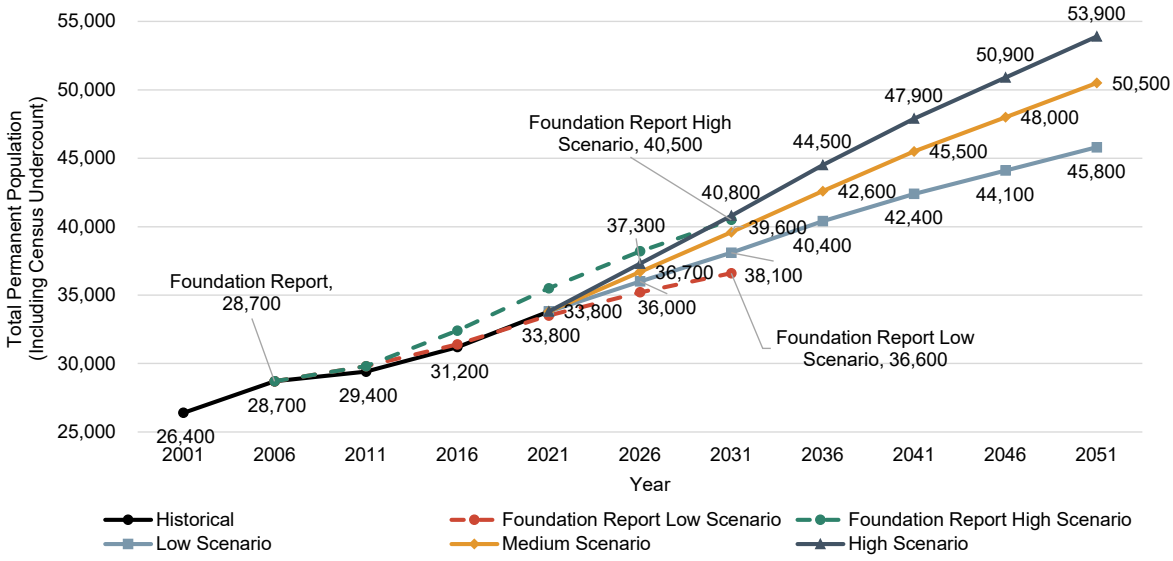
Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Building Permit data 2006 to 2020 (new units only). Forecast by Watson & Associates Economists Ltd.

Town of LaSalle

- The Town of LaSalle existing population base as of 2021 comprises approximately 17% and 9%, respectively, of the County-wide residents and jobs.
- As summarized in Figure 5-24, the population of LaSalle is anticipated to reach between 45,800 to 53,900 persons by 2051, accommodating approximately 17% of the County population over the forecast horizon under the Medium Scenario.
- The population of LaSalle is anticipated to grow at an annual rate between 1.0% and 1.6% over the next 30 years (2021 to 2051) which is consistent with the annual growth rate experienced over the most recent 20-year Census period (2001 to 2021) annual growth rate of 1.3% annually.
- As summarized in Figure 5-25, the employment base of LaSalle is anticipated to reach between 10,600 and 12,800 jobs by 2051, accommodating approximately 11% of the County's employment growth over the forecast horizon under the Medium Scenario.
- The employment base of LaSalle is anticipated to grow at an annual rate between 1.6% to 2.3 %, which is significantly higher than the employment growth rate observed between 2006 and 2021, estimated at 1.1% annually.

- The Town of LaSalle has experienced a steady increase in residential building permit activity (new units only) over the past five years compared to previous periods over the past 15 years. Forecast levels of housing growth over the next 30 years are anticipated to remain well above the historical long-term average over the past 15 years.
- As summarized in Figure 5-26 and Figure 5-27, LaSalle is anticipated to add approximately 6,900 additional housing units over the 2021 to 2051 period, representing approximately 230 units annually under the Medium Growth Scenario. Comparatively, this is significantly higher than when compared to annual residential building permit activity (new units only) issued over the past 15 years (179 housing units annually). Under the Low and High Growth Scenario, the Town of LaSalle is forecast to average between 180 and 260 total households per year over the next 30 years.
- It is anticipated that LaSalle will accommodate a greater range of housing by structure type compared to historical trends.

Figure 5-24
Town of LaSalle
Long-term Forecast Population Scenarios, 2021 to 2051 graph

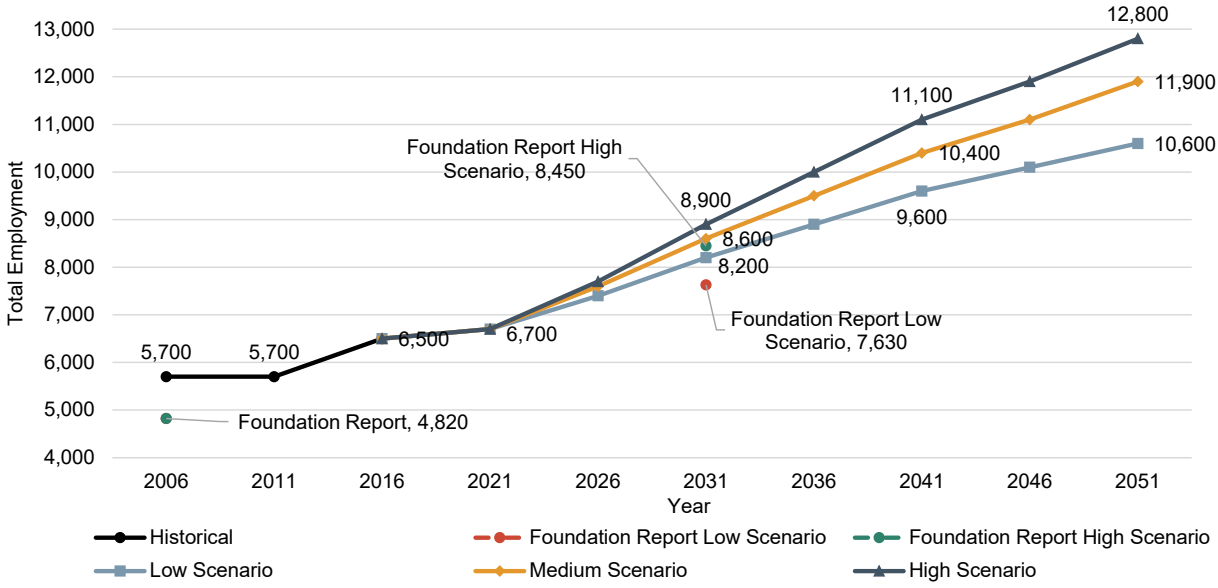


Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical from Statistics Canada Census 2006 to 2021. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	33,800	45,800	12,000	400	1.0%
Medium Scenario	33,800	50,500	16,700	560	1.3%
High Scenario	33,800	53,900	20,100	670	1.6%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-25
Town of LaSalle
Long-term Forecast Employment Forecast Scenarios, 2021 to 2051

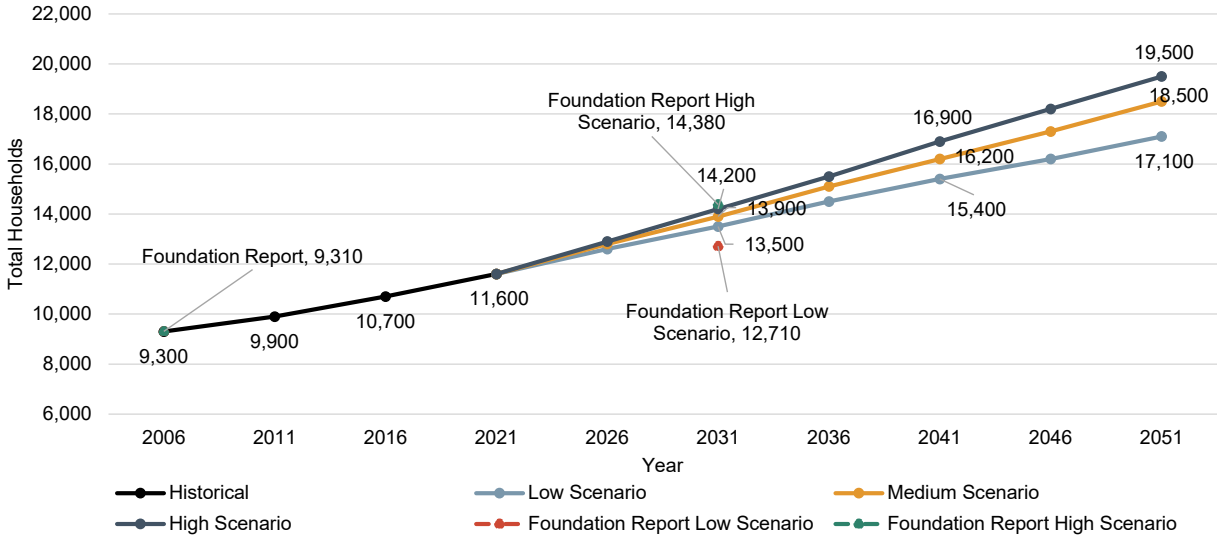


Note: Total employment includes no fixed place of work and work at home employment.
Source: Historical from Statistics Canada Census 2006 to 2016. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	6,500	10,600	4,100	140	1.6%
Medium Scenario	6,500	11,900	5,400	180	2.0%
High Scenario	6,500	12,800	6,300	210	2.3%

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated by Watson & Associates Economists Ltd. Forecast by Watson & Associates Economists Ltd.

Figure 5-26
Town of LaSalle
Long-term Forecast Housing Scenarios. 2021 to 2051

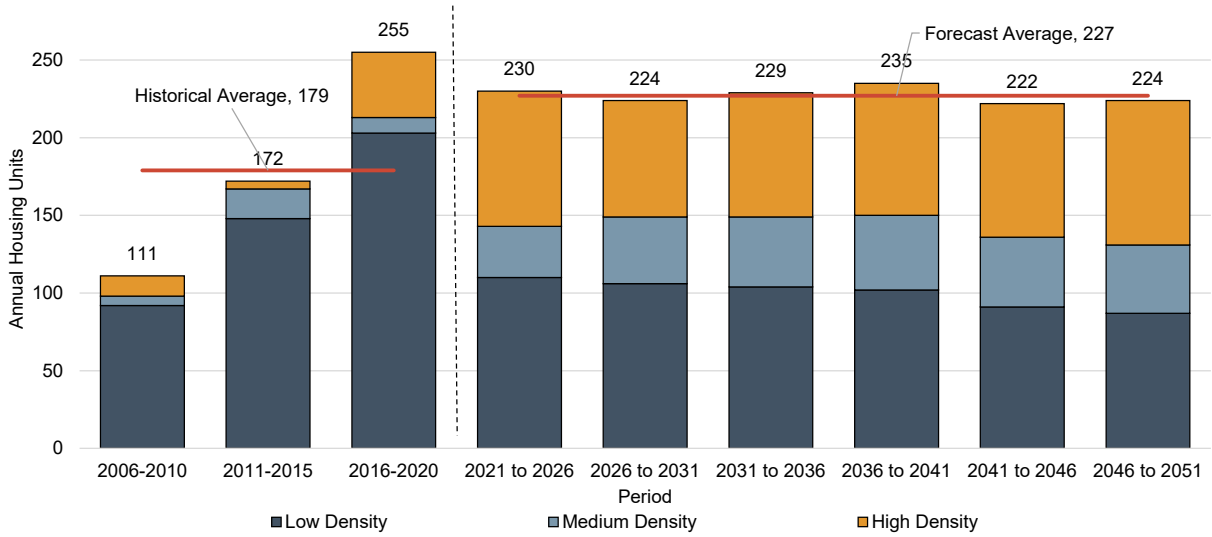


Note: Figures have been rounded..
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	11,600	17,100	5,500	180	1.3%
Medium Scenario	11,600	18,500	6,900	230	1.6%
High Scenario	11,600	19,500	7,900	260	1.7%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-27
Town of LaSalle
Long-term Forecast Housing by Structure Type, Medium Scenario, 2021 to 2051



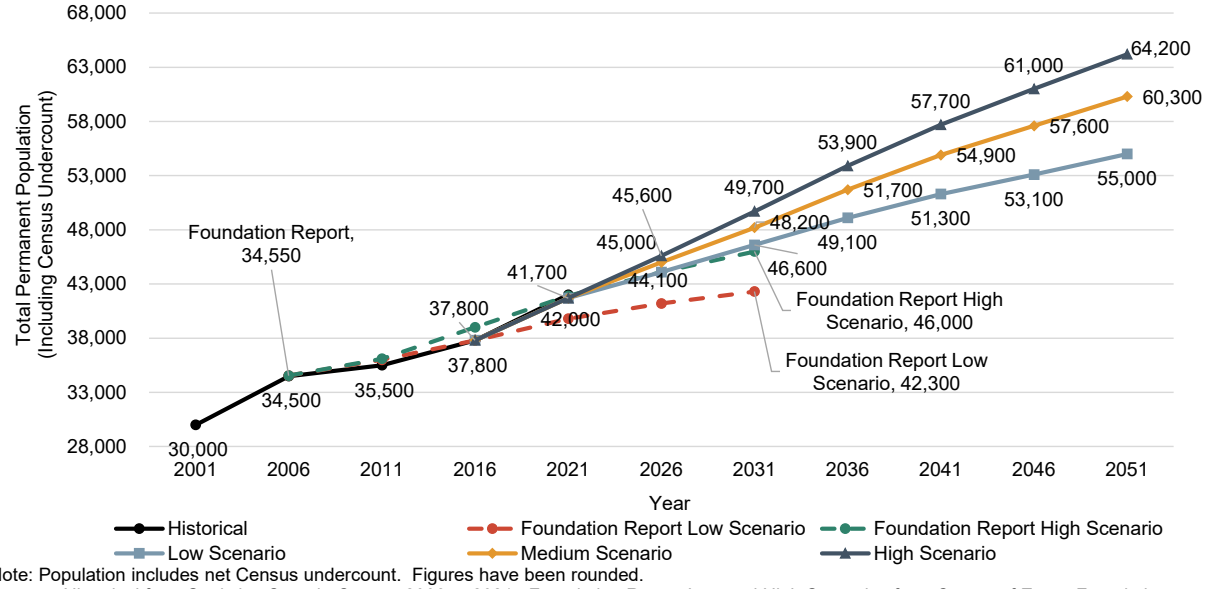
Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Building Permit data 2006 to 2020 (new units only). Forecast by Watson & Associates Economists Ltd.

Municipality of Lakeshore

- The Municipality of Lakeshore existing population base as of 2021 comprises of 21% and 20%, respectively of the County-wide residents and jobs.
- As summarized in Figure 5-28, the population of Lakeshore is anticipated to reach between 55,000 to 64,200 persons by 2051, accommodating approximately 19% of the County population over the forecast horizon under the Medium Scenario.
- The population of Lakeshore is anticipated to grow at an annual rate between 0.9% and 1.4%, which is slightly lower than the annual growth rate experienced over the most recent 20-year Census period (2001 to 2021) annual growth rate of 1.7% annually.
- As summarized in Figure 5-29, the employment base of Lakeshore is anticipated to reach between 21,600 to 26,200 jobs by 2051, accommodating approximately 22% of the County's employment growth over the forecast horizon under the Medium Scenario.
- The employment base of Lakeshore is anticipated to grow at an annual rate between 1.5% and 2.1%, which is significantly higher than the employment growth rate observed between 2006 and 2021, estimated at 0.9% annually.

- As summarized in Figures 5-30 and 5-31, Lakeshore is anticipated to add 6,800 additional housing units over the 2021 to 2051 period, representing approximately 230 units annually. Comparatively, this represents an increase of approximately 20% relative to annual residential building permit activity (new units only) issued over the past 15 years (194 housing units annually). Under the Low and High Growth Scenario, the Municipality of Lakeshore is forecast to average between 180 and 260 total households per year over the next 30 years.
- It is anticipated that Lakeshore will accommodate a wider range of housing by structure type compared to historical trends.

Figure 5-28
Municipality of Lakeshore
Long-term Forecast Population Scenarios, 2021 to 2051

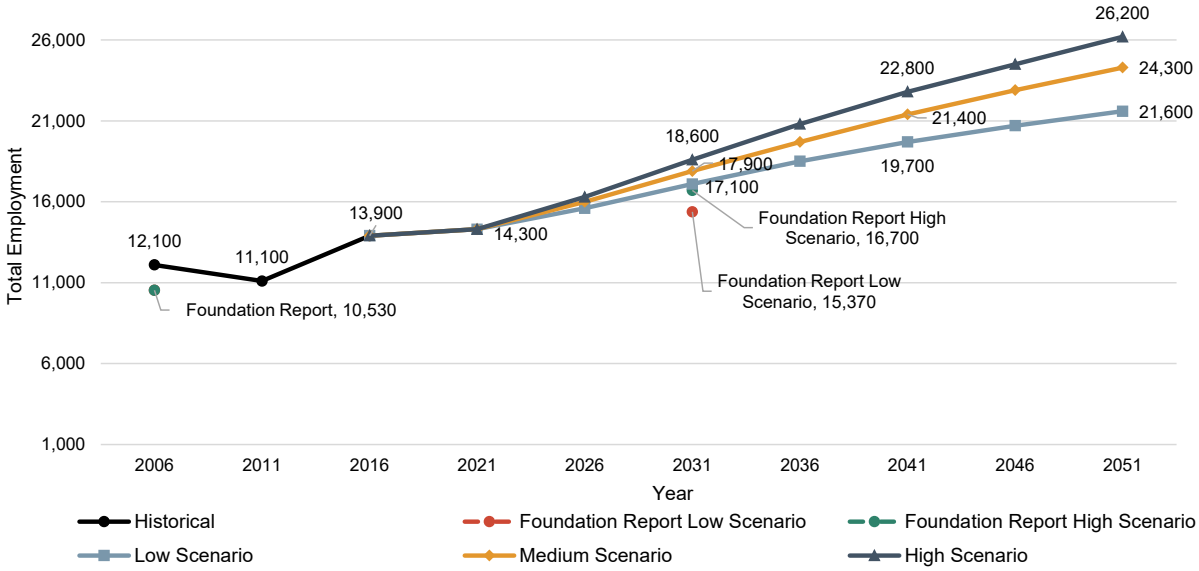


Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical from Statistics Canada Census 2006 to 2021. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	41,700	55,000	13,300	440	0.9%
Medium Scenario	41,700	60,300	18,600	620	1.2%
High Scenario	41,700	64,200	22,500	750	1.4%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-29
Municipality of Lakeshore
Long-term Forecast Employment Forecast Scenarios, 2021 to 2051

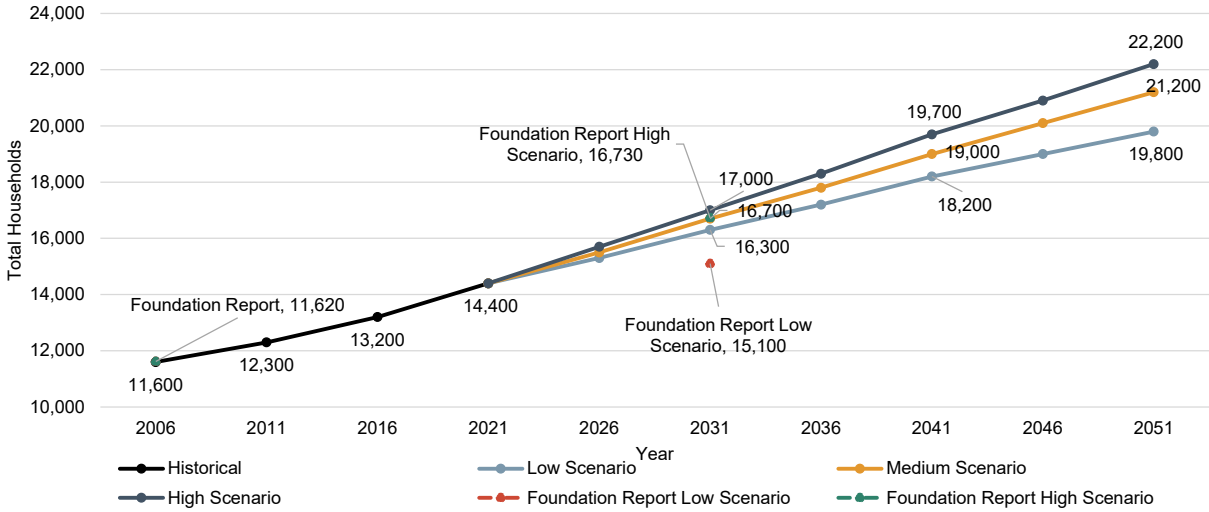


Note: Total employment includes no fixed place of work and work at home employment.
Source: Historical from Statistics Canada Census 2006 to 2016. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	13,900	21,600	7,700	260	1.5%
Medium Scenario	13,900	24,300	10,400	350	1.9%
High Scenario	13,900	26,200	12,300	410	2.1%

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated by Watson & Associates Economists Ltd. Forecast by Watson & Associates Economists Ltd.

Figure 5-30
Municipality of Lakeshore
Long-term Forecast Housing Scenarios. 2021 to 2051

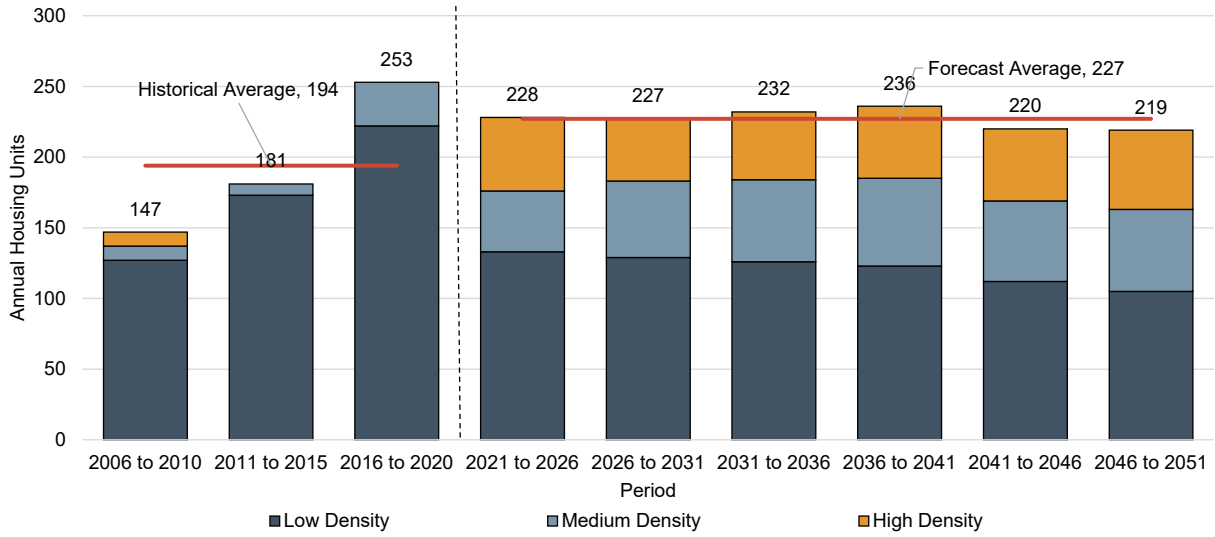


Note: Population includes net Census undercount.
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	14,400	19,800	5,400	180	1.1%
Medium Scenario	14,400	21,200	6,800	230	1.3%
High Scenario	14,400	22,200	7,800	260	1.5%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-31
Municipality of Lakeshore
Long-term Forecast Housing by Structure Type, Medium Scenario, 2021 to 2051



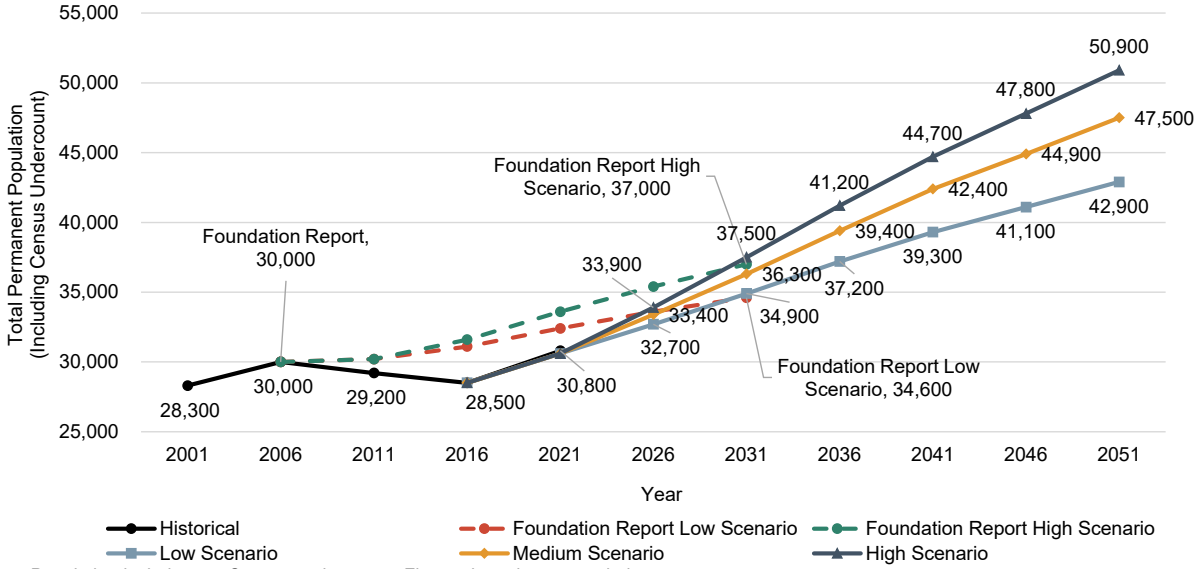
Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ in apartments.
Source: Derived from Statistics Canada Building Permit data 2006 to 2020 (new units only). Forecast by Watson & Associates Economists Ltd.

Municipality of Leamington

- The Municipality of Leamington existing population base as of 2021 comprises of approximately 15% and 21%, respectively of the County-wide respectively of County-wide residents and jobs.
- As summarized in Figure 5-32, the population of Leamington is anticipated to reach 42,900 to 50,900 persons by 2051, accommodating approximately 18% of the County population over the forecast horizon under the Medium Scenario.
- The Municipality of Leamington is anticipated to accommodate a significantly greater share of County-wide population and employment growth relative to historical trends over the past 15 years, largely driven by the Municipality's strong economic growth potential within the agricultural sector combined with its continued attractiveness to empty nesters and seniors as a retirement designation.
- Within the agricultural sector, the Municipality of Leamington is forecast to add 6,180 jobs. A large share of these jobs is associated with new greenhouse development activity. Over the 2021 to 2051 forecast period, the Municipality of Leamington is forecast to add approximately 14,996,000 sq.m (161,413,000. sq.ft) of new greenhouses across its rural areas.

- The population of Leamington is anticipated to grow at an annual rate between 1.1% and 1.7%, over the next 30-years (2021 to 2051) which is higher than the annual growth rate experienced over the most recent 20-year Census period (2006 to 2021). During this period the Municipality achieved an average annual population growth rate of 0.4%.
- As summarized in Figure 5-33, the employment base of Leamington is anticipated to reach between 25,400 to 27,700 jobs by 2051, accommodating approximately 26% of the County's employment growth over the forecast horizon under the Medium Scenario.
- The employment base of Leamington is anticipated to grow at an annual rate between 2.4% and 2.7 %, which is significantly higher than the employment growth rate observed between 2006 and 2021, estimated at 0.6% annually.
- As summarized in Figure 5-34 and 5-35, Leamington is anticipated to add 6,280 additional housing units over the 2021 to 2051 period, representing approximately 210 units annually, which is approximately 2.5 times the annual housing compared to annual residential building permit activity (new units only) issued over the past 15 years (87 housing units annually). Of the total annual housing forecast, approximately 29% are comprised of on-farm/off-farm migrant workers. Under the Low and High Growth Scenario, the Municipality of Leamington is forecast to average between 170 and 240 total households per year over the next 30 years.
- It is anticipated that Leamington will accommodate a wider range of housing by structure type, including an increasing share of townhomes and low-rise apartments.

Figure 5-32
Municipality of Leamington
Long-term Forecast Population Scenarios, 2021 to 2051

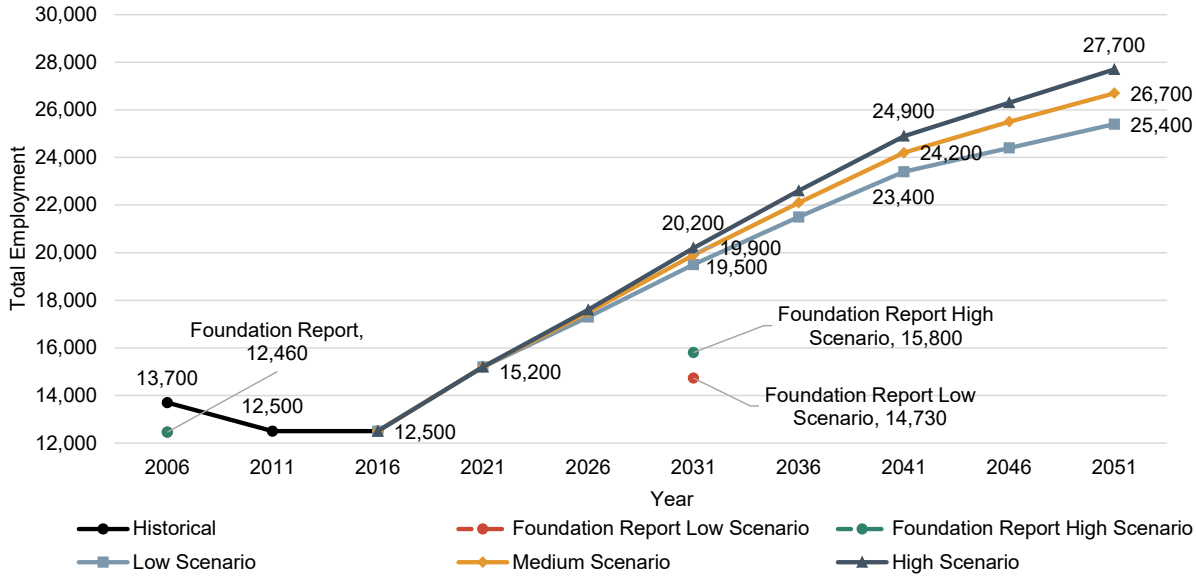


Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical from Statistics Canada Census 2006 to 2021. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	30,600	42,900	12,300	410	1.1%
Medium Scenario	30,600	47,500	16,900	560	1.5%
High Scenario	30,600	50,900	20,300	680	1.7%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-33
Municipality of Leamington
Long-term Forecast Employment Forecast Scenarios, 2021 to 2051

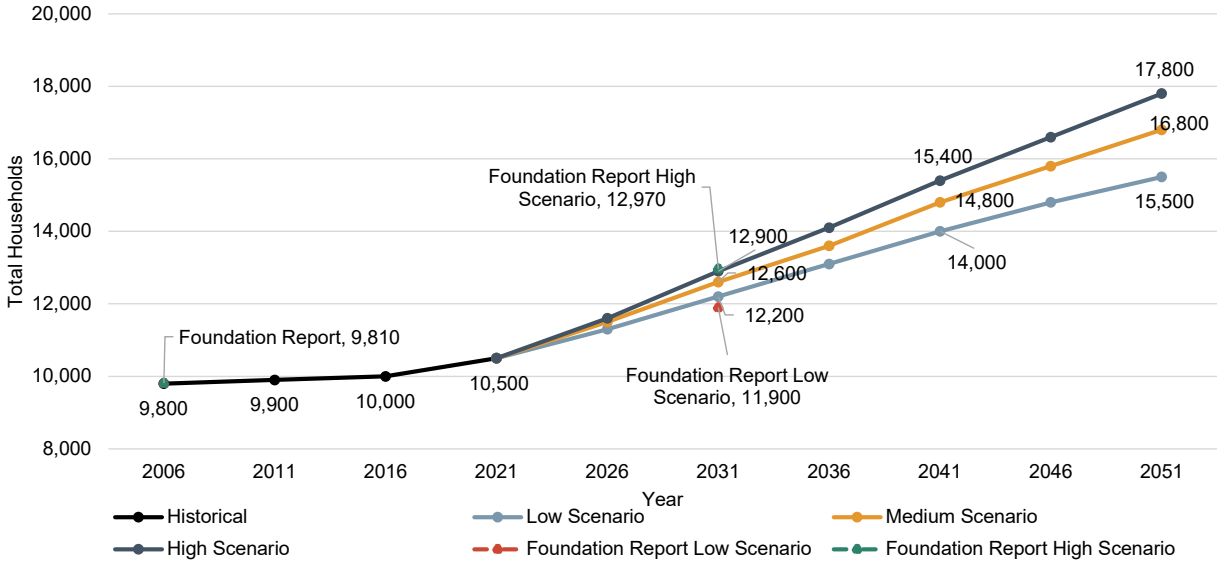


Note: Total employment includes no fixed place of work and work at home employment.
Source: Historical from Statistics Canada Census 2006 to 2016. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	12,500	25,400	12,900	430	2.4%
Medium Scenario	12,500	26,700	14,200	470	2.6%
High Scenario	12,500	27,700	15,200	510	2.7%

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated by Watson & Associates Economists Ltd. Forecast by Watson & Associates Economists Ltd.

Figure 5-34
Municipality of Leamington
Long-term Forecast Housing Scenarios, 2021 to 2051

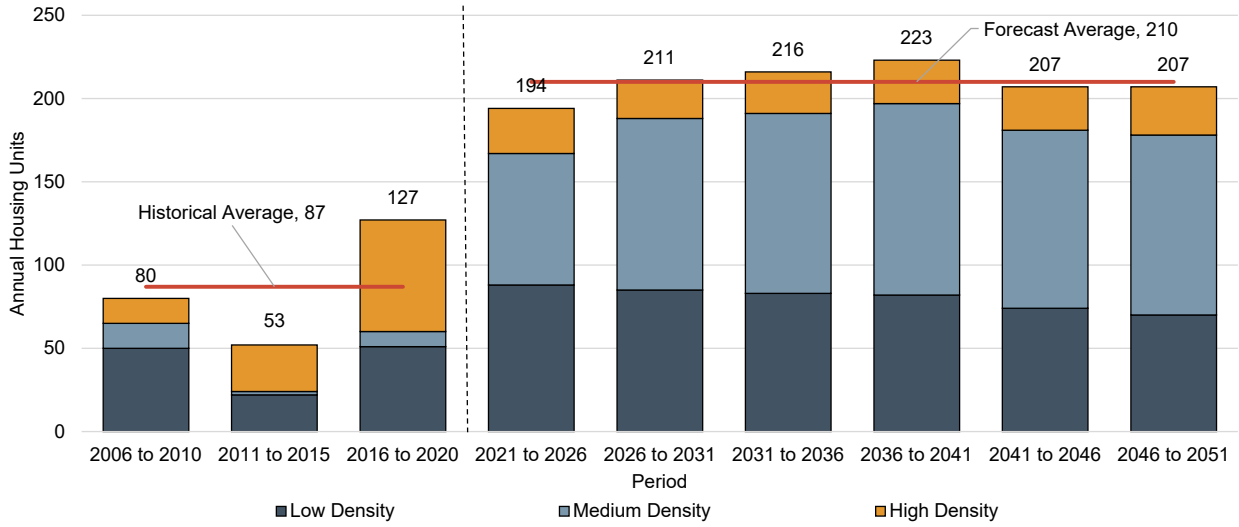


Note: Population includes net Census undercount.
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	10,500	15,500	5,000	170	1.3%
Medium Scenario	10,500	16,800	6,300	210	1.6%
High Scenario	10,500	17,800	7,300	240	1.8%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-35
Municipality of Leamington
Long-term Forecast Housing by Structure Type, Medium Scenario, 2021 to 2051



Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Building Permit data 2006 to 2020 (new units only). Forecast by Watson & Associates Economists Ltd.

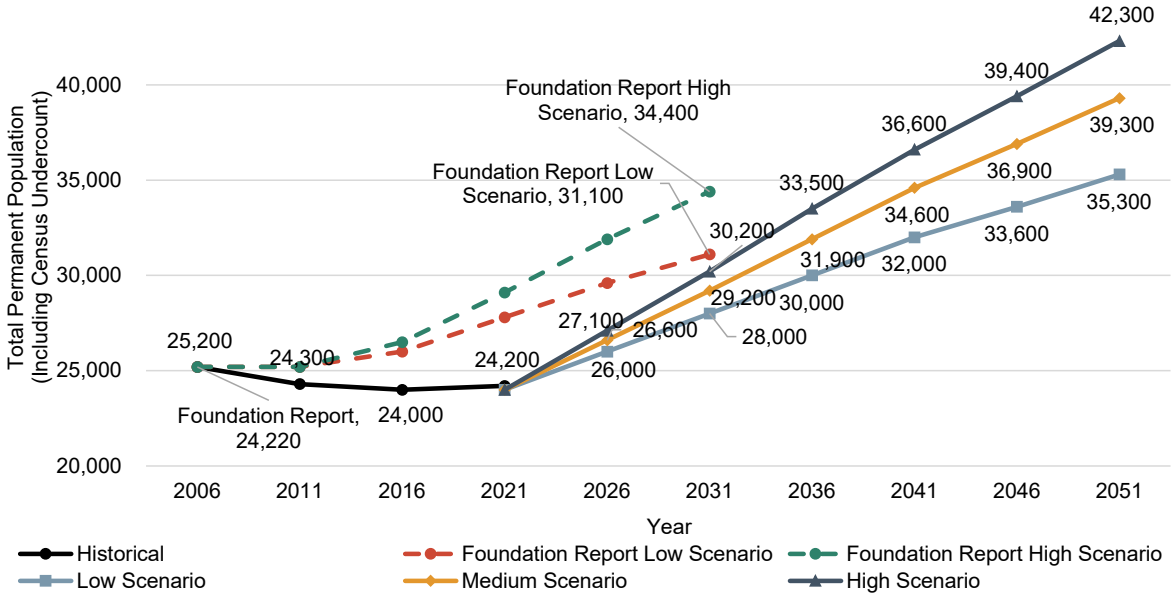
Town of Tecumseh

- The Town of Tecumseh existing population and employment base as of 2021 comprises approximately 12% and 23%, respectively of County-wide residents and jobs.
- As summarized in Figure 5-24, the population of Tecumseh is anticipated to reach 35,300 to 42,300 persons by 2051, accommodating approximately 16% of the County population over the forecast horizon under the Medium Scenario.
- The population of Tecumseh is anticipated to grow at an annual rate between 1.3% and 1.9% over the next 30 years (2021 to 2051) which is significantly higher than the annual growth rate experienced over the most recent 20-year Census period (2006 to 2021) annual growth rate of -0.4% annually.
- As summarized in Figure 5-37, the employment base of Tecumseh is anticipated to reach between 21,200 and 24,000 jobs by 2051, accommodating approximately 15% of the County's employment growth over the forecast horizon under the Medium Scenario.
- The employment base of Tecumseh is anticipated to grow at an annual rate between 1.1% to 1.5 %, which is significantly higher than the employment growth rate observed between 2006 and 2021, estimated at 0.8% annually.

- The Town of Tecumseh has experienced a steady increase in residential building permit activity (new units only) over the past five years compared to previous periods over the past 15 years. Forecast levels of housing growth over the next 30 years are anticipated to remain well above the historical long-term average over the past 15 years.
- As summarized in Figures 5-38 and 5-39, Tecumseh is anticipated to add 6,830 additional housing units over the 2021 to 2051 period, representing approximately 230 units annually, which is approximately five times the annual housing when compared to annual residential building permit activity (new units only) issued over the past 15 years (47 housing units annually). Under the Low and High Growth Scenario, the Town of Tecumseh is forecast to average between 180 and 260 total households per year over the next 30 years.
- It is anticipated that Tecumseh will accommodate a greater range of housing by structure type compared to historical trends, including an increasing share of townhomes and apartments. This is consistent with upcoming development in the Town's active development pipeline (registered/unbuilt and proposed), as previously discussed.
- As previously discussed in section 3.3.4, the Town of Tecumseh is making significant investments to ensure that servicing is available to accommodate significantly higher projected population, housing and employment demand in their designated Primary Settlement Areas. With the availability of serviced urban land now coming on stream in the Town of Tecumseh, and given the Town's inherent locational, servicing and transportation attributes, future population and employment growth rates for the Town of Tecumseh are anticipated to increase significantly over the forecast period, relative to historical trends over the past 20 years.
- It is recognized that there is a relatively high level of inter-connection and socio-economic interaction within the broader Windsor-Essex regional housing market, particularly between the City of Windsor, Town of Lasalle, Town of Tecumseh and Town of Lakeshore. Accordingly, it is anticipated a portion of housing market demand which has recently been accommodated in the Town of Lasalle and Lakeshore as well as east Windsor will shift to the Town of Tecumseh. As a result of this shift in housing market demand annual levels of new housing development activity between the Town of Tecumseh, Town of LaSalle and Town

of Lakeshore are anticipated to be relatively balanced over the 2021 to 2051 forecast horizon.

Figure 5-36
Town of Tecumseh
Long-term Forecast Population Scenarios, 2021 to 2051

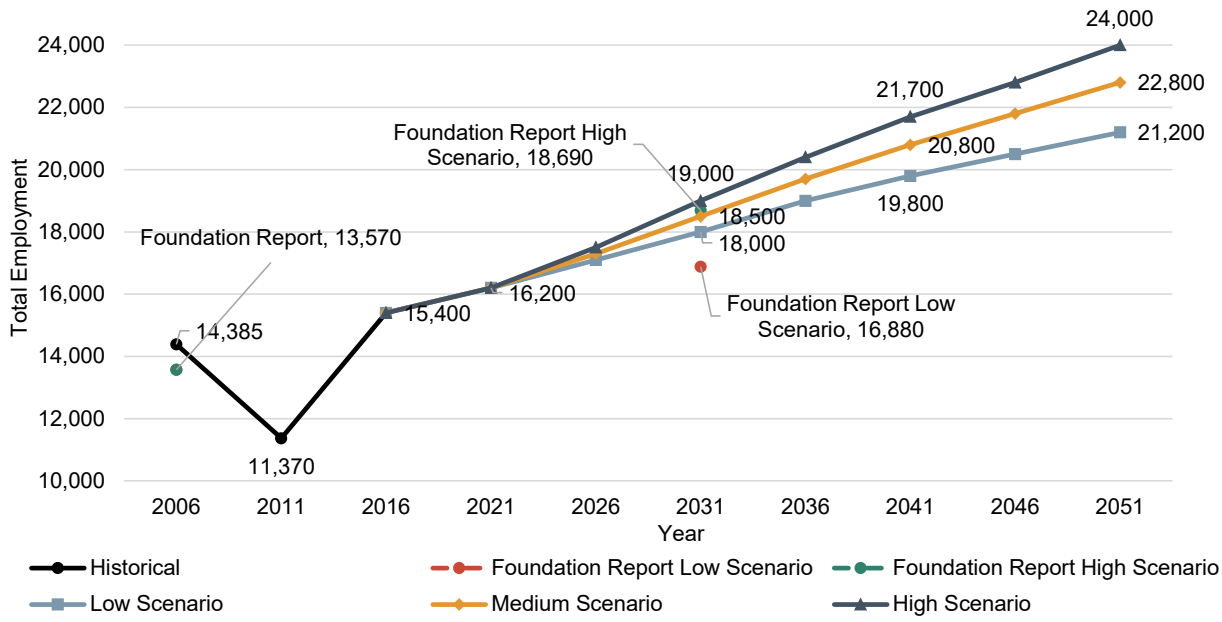


Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical from Statistics Canada Census 2006 to 2021. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Population Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	24,000	35,300	11,300	380	1.3%
Medium Scenario	24,000	39,300	15,300	510	1.7%
High Scenario	24,000	42,300	18,300	610	1.9%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-37
Town of Tecumseh
Long-term Forecast Employment Forecast Scenarios, 2021 to 2051

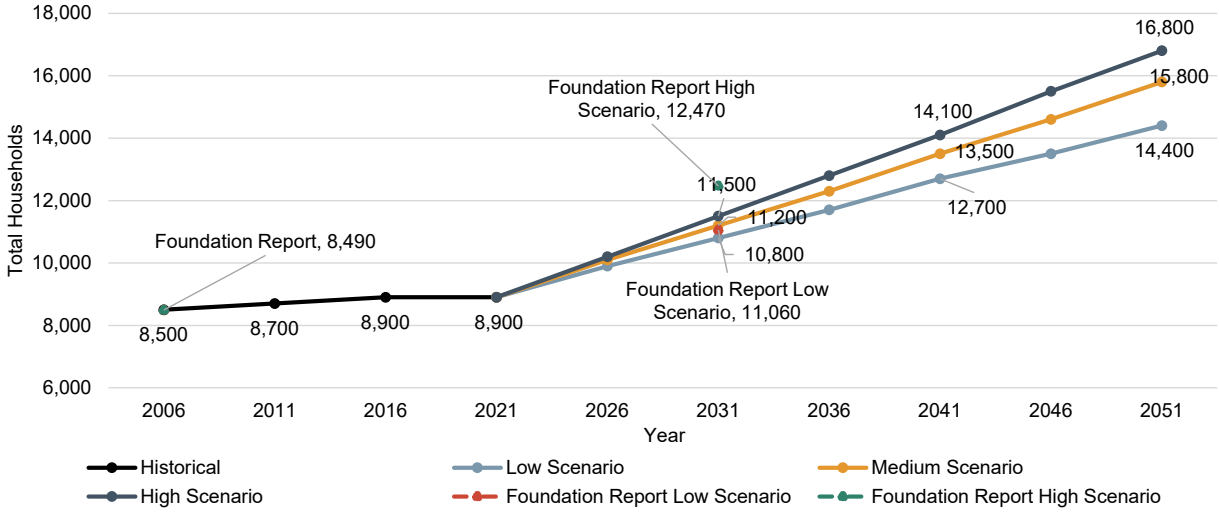


Note: Total employment includes no fixed place of work and work at home employment.
Source: Historical from Statistics Canada Census 2006 to 2016. Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Employment Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	15,400	21,200	5,800	190	1.1%
Medium Scenario	15,400	22,800	7,400	250	1.3%
High Scenario	15,400	24,000	8,600	290	1.5%

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated by Watson & Associates Economists Ltd. Forecast by Watson & Associates Economists Ltd.

Figure 5-38
Town of Tecumseh
Long-term Forecast Housing Scenarios. 2021 to 2051

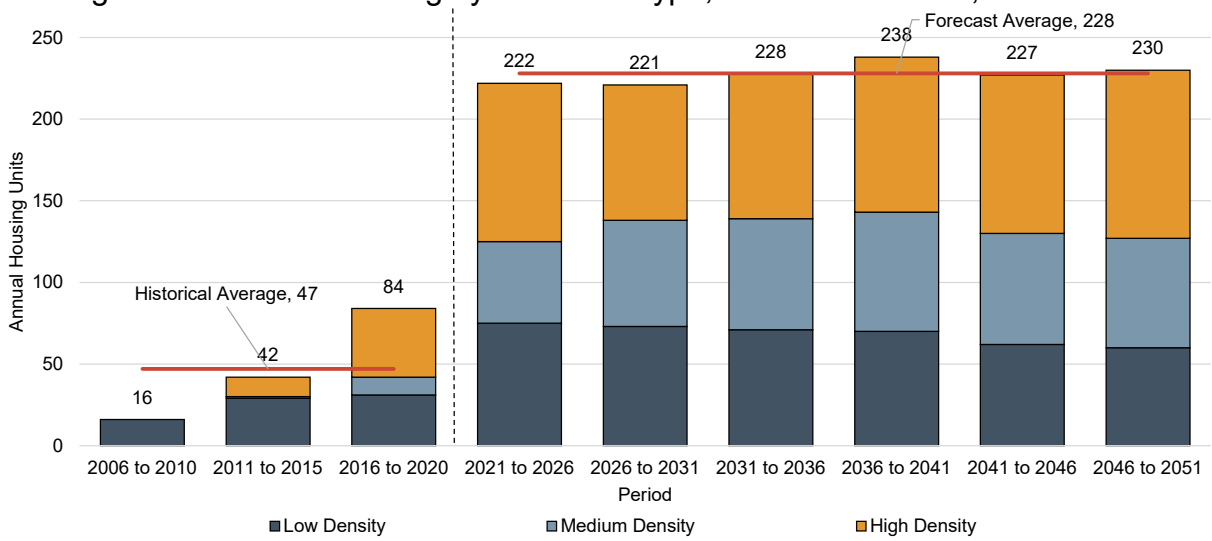


Note: Figures have been rounded.
Source: Foundation Report Low and High Scenarios from County of Essex Foundation Report: Essex County Official Plan Review, 2011, N. Barry Lyon Consultants Limited.
2021 to 2051 Forecast by Watson & Associates Economists Ltd.

Housing Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	8,900	14,400	5,500	180	1.6%
Medium Scenario	8,900	15,800	6,900	230	1.9%
High Scenario	8,900	16,800	7,900	260	2.1%

Note: Figures may not add precisely due to rounding.
Source: 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

Figure 5-39
Town of Tecumseh
Long-term Forecast Housing by Structure Type, Medium Scenario, 2021 to 2051



Note: Low Density includes singles and semis.
Medium Density includes townhouses and apartments in duplexes.
High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.
Source: Derived from Statistics Canada Building Permit data 2006 to 2020 (new units only). Forecast by Watson & Associates Economists Ltd.

Figure 5-40
Essex County
Population Forecast by Local Municipality

Low Scenario, 2021 to 2051**Error! Not a valid link.**Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-41
Essex County
Household Forecast by Area Municipality
Low Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	8,520	8,090	7,975	10,685	13,175	10,005	8,885	67,335
2021	9,185	8,380	8,290	11,640	14,380	10,535	8,945	71,395
2026	9,795	8,730	8,820	12,605	15,335	11,335	9,875	76,540
2031	10,410	9,065	9,370	13,540	16,285	12,215	10,800	81,720
2036	11,005	9,395	9,900	14,470	17,220	13,090	11,725	86,845
2041	11,590	9,720	10,425	15,390	18,150	13,970	12,660	91,950
2046	12,095	10,010	10,900	16,240	18,985	14,760	13,520	96,560
2051	12,605	10,305	11,360	17,090	19,825	15,540	14,400	101,155
2021-2031	1,225	685	1,080	1,900	1,905	1,680	1,855	10,325
2021-2041	2,405	1,340	2,135	3,750	3,770	3,435	3,715	20,555
2021-2051	3,420	1,925	3,070	5,450	5,445	5,005	5,455	29,760

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-42
Essex County
Employment Forecast by Area Municipality
Low Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	5,600	6,700	7,500	6,500	13,900	12,500	15,400	68,000
2021	5,800	6,800	7,400	6,700	14,300	15,200	16,200	72,300
2026	6,200	7,400	8,100	7,400	15,600	17,300	17,100	79,100
2031	6,800	8,000	8,800	8,200	17,100	19,500	18,000	86,400
2036	7,300	8,600	9,500	8,900	18,500	21,500	19,000	93,200
2041	7,800	9,000	10,100	9,600	19,700	23,400	19,800	99,300
2046	8,100	9,400	10,500	10,100	20,700	24,400	20,500	103,600
2051	8,500	9,700	10,900	10,600	21,600	25,400	21,200	107,900
2021-2031	1,000	1,200	1,400	1,500	2,800	4,300	1,800	14,100
2021-2041	2,000	2,200	2,700	2,900	5,400	8,200	3,600	27,000
2021-2051	2,700	2,900	3,500	3,900	7,300	10,200	5,000	35,600

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-43
Essex County
Population Forecast by Area Municipality
Medium Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	22,600	21,100	22,200	31,100	37,800	28,500	24,000	187,300
2021	24,300	21,900	22,800	33,800	41,700	30,600	24,000	199,100
2026	26,400	23,100	24,600	36,700	45,000	33,400	26,600	215,600
2031	28,500	24,200	26,400	39,600	48,200	36,300	29,200	232,500
2036	30,700	25,500	28,300	42,600	51,700	39,400	31,900	250,100
2041	32,700	26,600	30,100	45,500	54,900	42,400	34,600	266,600
2046	34,400	27,500	31,600	48,000	57,600	44,900	36,900	280,900
2051	36,100	28,300	33,100	50,500	60,300	47,500	39,300	295,000
2021-2031	4,200	2,300	3,600	5,800	6,500	5,700	5,200	33,400
2021-2041	8,400	4,700	7,300	11,700	13,200	11,800	10,600	67,500
2021-2051	11,800	6,400	10,300	16,700	18,600	16,900	15,300	95,900

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-44
Essex County
Household Forecast by Area Municipality
Medium Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	8,520	8,090	7,975	10,685	13,175	10,005	8,885	67,335
2021	9,185	8,380	8,290	11,640	14,380	10,535	8,945	71,395
2026	9,920	8,800	8,925	12,790	15,520	11,505	10,055	77,545
2031	10,645	9,195	9,575	13,910	16,655	12,560	11,160	83,745
2036	11,385	9,605	10,245	15,055	17,815	13,640	12,300	90,085
2041	12,120	10,015	10,910	16,230	18,995	14,755	13,490	96,545
2046	12,800	10,400	11,525	17,340	20,095	15,790	14,625	102,605
2051	13,465	10,780	12,130	18,460	21,190	16,825	15,775	108,670
2021-2031	1,460	815	1,285	2,270	2,275	2,025	2,215	12,350
2021-2041	2,935	1,635	2,620	4,590	4,615	4,220	4,545	25,150
2021-2051	4,280	2,400	3,840	6,820	6,810	6,290	6,830	37,275

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-45
Essex County
Employment Forecast by Area Municipality
Medium Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	5,600	6,700	7,500	6,500	13,900	12,500	15,400	68,000
2021	5,700	6,800	7,400	6,600	14,100	15,100	16,200	71,900
2026	6,400	7,500	8,200	7,600	16,000	17,500	17,400	80,500
2031	7,100	8,300	9,100	8,600	17,800	19,900	18,600	89,200
2036	7,800	9,000	9,900	9,500	19,700	22,100	19,800	97,700
2041	8,400	9,600	10,700	10,400	21,400	24,200	20,900	105,500
2046	8,900	10,000	11,200	11,100	22,800	25,500	21,900	111,400
2051	9,400	10,500	11,800	11,800	24,200	26,700	22,900	117,200
2021-2031	1,400	1,500	1,700	2,000	3,700	4,800	2,400	17,300
2021-2041	2,700	2,800	3,300	3,800	7,300	9,100	4,700	33,600
2021-2051	3,700	3,700	4,400	5,200	10,100	11,600	6,700	45,300

Note: Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-46
Essex County
Population Forecast by Area Municipality
High Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	22,600	21,100	22,200	31,100	37,800	28,500	24,000	187,300
2021	24,300	21,900	22,800	33,800	41,700	30,600	24,000	199,100
2026	26,800	23,300	25,000	37,300	45,600	33,900	27,100	219,000
2031	29,400	24,800	27,200	40,800	49,700	37,500	30,200	239,800
2036	32,000	26,400	29,500	44,500	53,900	41,200	33,500	261,000
2041	34,500	27,700	31,700	47,900	57,700	44,700	36,600	280,800
2046	36,500	28,800	33,500	50,900	61,000	47,800	39,400	298,000
2051	38,500	29,900	35,200	53,900	64,200	50,900	42,300	315,000
2021-2031	5,100	2,900	4,400	7,000	8,000	6,900	6,200	40,700
2021-2041	10,200	5,800	8,900	14,100	16,000	14,100	12,600	81,700
2021-2051	14,200	8,000	12,400	20,100	22,500	20,300	18,300	115,900

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-47
Essex County
Household Forecast by Area Municipality
High Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	8,520	8,090	7,975	10,685	13,175	10,005	8,885	67,335
2021	9,185	8,380	8,290	11,640	14,380	10,535	8,945	71,395
2026	10,015	8,850	9,015	12,935	15,665	11,640	10,200	78,350
2031	10,860	9,310	9,770	14,225	16,980	12,850	11,470	85,505
2036	11,705	9,780	10,525	15,545	18,315	14,100	12,785	92,785
2041	12,545	10,245	11,285	16,880	19,660	15,370	14,140	100,165
2046	13,330	10,690	12,005	18,170	20,935	16,580	15,460	107,215
2051	14,105	11,145	12,715	19,500	22,220	17,785	16,815	114,325
2021-2031	1,675	930	1,480	2,585	2,600	2,315	2,525	14,110
2021-2041	3,360	1,865	2,995	5,240	5,280	4,835	5,195	28,770
2021-2051	4,920	2,765	4,425	7,860	7,840	7,250	7,870	42,930

Note: Figures may not add precisely due to rounding.
Source: 2016 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-48
Essex County
Employment Forecast by Area Municipality
High Scenario, 2021 to 2051

Year	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	Essex County
2016	5,600	6,700	7,500	6,500	13,900	12,500	15,400	68,000
2021	5,800	6,800	7,400	6,700	14,300	15,200	16,200	72,300
2026	6,500	7,600	8,300	7,700	16,300	17,600	17,500	81,600
2031	7,300	8,500	9,300	8,900	18,600	20,200	19,000	91,700
2036	8,100	9,300	10,300	10,000	20,800	22,600	20,400	101,500
2041	8,900	10,000	11,100	11,100	22,800	24,900	21,700	110,400
2046	9,500	10,500	11,800	11,900	24,500	26,300	22,800	117,400
2051	10,000	11,100	12,400	12,800	26,200	27,700	24,000	124,200
2021-2031	1,500	1,700	1,900	2,200	4,300	5,000	2,800	19,400
2021-2041	3,100	3,200	3,700	4,400	8,500	9,700	5,500	38,100
2021-2051	4,200	4,300	5,000	6,100	11,900	12,500	7,800	51,900

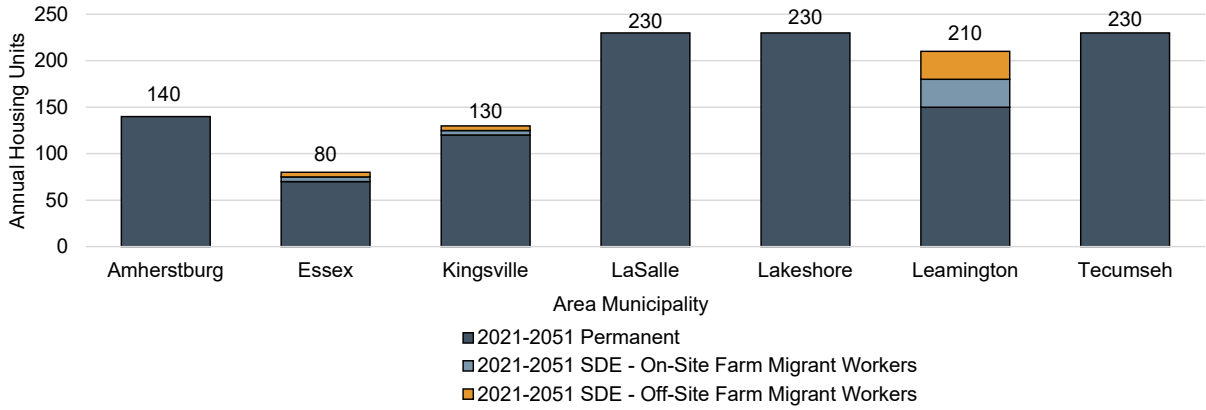
Note: Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-49
Essex County
Percentage Share of Population Growth by Local Municipality
Medium Scenario, 2021 to 2051

Local Municipality	2021 County Population (%)	Percent of 2021-2051 County Population Growth	2051 County Population (%)
Amherstburg	12%	12%	12%
Essex	11%	7%	10%
Kingsville	11%	11%	11%
LaSalle	17%	17%	17%
Lakeshore	21%	19%	20%
Leamington	15%	18%	16%
Tecumseh	12%	16%	13%
Essex County	**100%**	**100%**	**100%**

Note: Figures may not add precisely due to rounding.
Source: 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-50
Essex County
Annual Housing Unit Growth by Area Municipality and Type of Resident
Forecast Housing (Medium Scenario), 2021 to 2051



Note: Figures have been rounded.
Source: Historical derived from Statistics Canada building permit data and building permit data provided by Essex County, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure 5-51
Essex County
Percentage Share of Employment Growth by Local Municipality
Medium Scenario, 2021 to 2051

Local Municipality	2021 County Employment (%)	Percent of 2021-2051 County Employment Growth	2051 County Employment (%)
Amherstburg	8%	8%	8%
Essex	9%	8%	9%
Kingsville	10%	10%	10%
LaSalle	9%	11%	10%
Lakeshore	20%	22%	21%
Leamington	21%	26%	23%
Tecumseh	23%	15%	20%
Essex County	**100%**	**100%**	**100%**

Note: Figures may not add precisely due to rounding.
Source: 2021 estimated and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

5.9 Observations

By 2051, the Essex County total population base is forecast to grow to a range of approximately 268,000 to 315,000 persons. This represents an increase of approximately 69,000 to 116,000 residents between 2021 and 2051, or an average annual population growth rate between 1.0% to 1.3% during this time period. Comparatively, the population of the Province as a whole is forecast to increase at a rate of 1.3% over the 2021 to 2046 period.[1]

It is important to recognize that while the County's population base is growing, it is also getting older. Between 2021 and 2051, the 75+ age group is forecast to represent the fastest growing population age group with an average annual population growth rate of 3.4%. With an aging population, the County will be more reliant on net migration as a source of population as opposed to natural increase. With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density forms including seniors' housing and affordable housing options. Essex County is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.

Accommodating the forecast range in population growth across Essex County will require approximately 30,000 and 43,000 new households, or approximately 1,000 to 1,400 new households annually. For historical context, the County averaged approximately 700 new households annually between 2001 and 2021. To adequately accommodate future housing demand across a diverse selection of demographic and socio-economic groups, a range of new housing typologies will be required with respect to built-form, location and affordability across the County.

The County's total employment base is forecast to steadily increase by between approximately 108,000 to 124,000 jobs by the year 2051. This represents an increase of approximately 36,000 to 52,000 new jobs between 2021 and 2051, or an average

[1] Ministry of Finance Summer 2022 Population Projections, Reference Scenario for the Province of Ontario.

annual employment growth rate between 1.3% and 1.8% during this time period. Employment growth is anticipated across variety of export-based employment sectors (e.g., transportation and logistics, wholesale trade, construction, manufacturing and agri-business). Job growth potential within population-related employment sectors such as retail, accommodation and food, professional, scientific and technical scientific services, and education is also anticipated to drive near-term employment growth fueled by steady population growth. An increasing percentage of forecast job growth is anticipated to be accommodated through home occupations, home-based businesses and off-site employment.

As previously discussed, agricultural activities are significant to the overall Essex County economy. Between 2021 and 2051 the County employment sector is anticipated to experience a net employment increase of approximately 8,000 jobs. It is important to note that primary employment is also captured in the work at home and N.F.P.O.W. categories. As such, total employment growth associated with the primary sector is anticipated to be considerably higher than the usual place of work employment numbers identified herein. As previously mentioned, the County's agricultural sector draws considerable demand for seasonal workers, which has implications on housing needs within the County's urban and rural areas.

Population growth rates are not anticipated to be uniform across the County, with forecast population rates anticipated to be highest within the Town of Tecumseh and Municipality of Leamington. As previously noted, all Area Municipalities are anticipated to experience higher annual population and employment growth relative to historical trends between 2006 and 2021.

Looking forward over next five to 10 years and beyond, housing demand across all the County's Area Municipalities is anticipated to remain strong relative to recent historical levels, largely fueled by continued outward growth pressure from the G.G.H. as well as continued local employment opportunities, particularly within the County's growing export-based economy. However, it is noted that declining housing affordability, combined with a range of broader economic headwinds, including tightening monetary policy (i.e. rising interest rates and quantitative tightening), persistently high inflation rates, rising household debt and increased geo-political uncertainty are anticipated to moderate housing demand (particularly ownership housing) in the near-term relative to recent historical trends over the past two to three years.

Chapter 6
Conclusions

6. Conclusions

This study provides a comprehensive assessment of the County's long-term population, housing and employment growth potential to the year 2051, within the context of regional economic conditions and growth drivers as well as County-wide and local development trends. The findings of the Phase 1 Essex County C.R. identify the following.

The Long-Term Population and Economic Growth Outlook for Essex County is Very Positive

As discussed in detail throughout this report, Essex County is anticipated to experience steady population and employment growth over the next several decades, which is the horizon for this study. The County's long-term economic growth outlook has strengthened relative to the previous population and employment projections which were previously prepared for the County in 2011. This relative strength is anticipated to be driven by a combination of local economic opportunities which are driving higher immigration rates (including higher numbers of non-permanent residents), as well as increased inter- and intra-provincial net-migration to the Windsor-Essex Area.[1]

Within the Windsor-Essex Area, Essex County continues to have a strong appeal to both businesses and residents. This appeal is largely attributed to the County's geographic location which offers opportunities for urban and rural living within proximity to retail, entertainment and other urban amenities, including public and private schools, regional hospitals (including the proposed Windsor-Essex hospital), access to urban indoor and outdoor recreational facilities, as well as access to recreational opportunities along the County's waterfront areas and across the rural countryside. These attributes make Essex County an attractive destination for residents of all ages, students, as well as small, mid-sized and large-scale businesses.

[1] Non-permanent residents associated with greenhouse development activity (i.e. migrant workers), is largely anticipated to be accommodated within the Municipality of Leamington, and to a lesser extent the Town of Kingsville and the Town of Essex.

Steady future economic growth is anticipated across the Windsor-Essex Area, most notably associated with the need for local supply chains to support the planned Stellantis N.V and L.G. Energy Solution (L.G.E.S.) electric vehicle (E.V.) battery manufacturing facility. The joint venture company will invest over $5 billion CAD to establish the facility, which is scheduled to be operational by 2024 and estimated to create approximately 3,200 direct new jobs.[1] An additional 15,000 indirect jobs associated with the regional supply chain are also anticipated to support the planned facility.[2] Furthermore, the facility is anticipated to generate induced economic impacts associated with the re-spending of labour income (i.e., household spending) throughout the Windsor-Essex Area and beyond. Anticipated export-based job growth (i.e., industrial and commercial office jobs) within the Windsor-Essex Area also generates population-related employment to service the needs of the growing employment and population base (e.g., retail, accommodation and food, personal services and institutional services).

Home to over 1,700 farms, and the largest and most intensive greenhouse growing area in Canada, agricultural activities are significant to the overall Essex County economy.[3] Essex County is the largest and most intensive greenhouse growing area in Canada, estimated at approximately 5.5 million square metres (59 million square feet), comprising over 47% of Ontario's acreage related to greenhouse operations. Over the next three decades, Essex County is projected to add 15 million square metres (161 million square feet) of greenhouse development activity to its existing base as of 2022. Collectively, this additional greenhouse development activity is anticipated to generate approximately 8,000 new jobs within the agricultural sector, largely within the Municipality of Leamington and, to a lesser extent, within the Town of Kingsville and the Town of Essex. Additional housing opportunities will also be required to accommodate both on-farm and off-farm migrant workers associated with greenhouse development activity.

Given the competitive position of existing and planned Employment Areas across Essex County, as measured in terms of location/access to major North American employment markets and large population centres, parcel size, price per acre, and competitive

[1] https://www.stellantis.com/en/news/press-releases/2022
[2] BIZ X MAGAZINE: Windsor's EV Battery Plant – Rose City Politics (rcpwindsor.ca)
[3] Essex County Federation of Agriculture. ECFA

development costs, etc., Essex County is anticipated to achieve a relatively stronger rate of industrial absorption over the long-term planning horizon.

COVID-19 has had a Disruptive Impact on Population and Employment Growth as well as Non-Residential Space Needs

Over the past two years, COVID-19 accelerated already elevated residential development pressures across Essex County fueled by ultra-low interest rates combined with outward growth pressure from the G.T.H.A. Conversely, tightening of monetary policy by the Bank of Canada in response to persistently high inflation rates is likely to continue to cool the housing market for the remainder of 2022 and 2023. Looking forward over next five to 10 years, housing demand across all the County's Area Municipalities is anticipated to remain strong relative to recent historical levels, fueled by continued outward growth pressure from the G.G.H. as well as continued local employment opportunities, particularly within the County's growing export-based economy. Over the longer-term (i.e. 10+ years), annual housing demand is forecast to remain above historical averages experienced over the past two decades. However, over longer-term average rate of annual housing development is anticipated to gradually slow across all Area Municipalities, relative to recent residential development activity, driven by slower regional and provincial economic growth associated with an aging population and labour force.

In addition to its broader impacts on the economy, COVID-19 is also accelerating changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with an increased emphasis on remote work enabled by technology. These disruptive forces are anticipated to continue to broadly impact the nature of employment by place of work and sector, and influence long-term non-residential space needs for the County associated with the commercial, institutional and industrial real estate.

The County's Housing Needs will Continue to Grow and Diversify

To accommodate the range of future population growth projected across Essex County over the next 30 years, the County will require approximately 1,000 to 1,400 new households per year. This represents an increase in annual new housing construction of between approximately one and half to two times levels achieved over the past 20

years (between 2001 and 2021). New residential development within Essex County is anticipated to gradually shift away from low-density housing forms, largely driven by declining housing affordability associated with low-density housing options as well as increased population diversity by income and ethnicity.

Future housing growth is anticipated across a diverse range of housing forms. Notably, increased market demand is anticipated over the next three decades for medium-density and high-density housing as the local and provincial population base continues to age and diversify. As previously noted, declining housing affordability also represents a key driver for an increasing share of medium- and high-density housing forms.

The share of future housing demand is anticipated to continue to increase within the County's urban areas largely driven by new families in search of competitively priced, ground-oriented housing located within proximity to local urban amenities (i.e., schools, retail, personal service uses) and surrounding employment markets. As such, the County's population share is anticipated to become more urban over the next three decades placing increasing demand on urban infrastructure, municipal services and other urban amenities.

The County's population is aging. By 2051, 25% percent of the County population will be 65+ years of age or older, up from 20% in 2021, with growth concentrated in the 75+ years of age group increasing from 8% in 2021 to 15% 2051. This will require a broader range of housing options to be provided to older residents across a range of income levels. Housing demands from the 55-74 age group (empty nester/younger seniors) and the 75+ age group (older seniors) is anticipated to drive the future need for urban housing across all Area Municipalities in Essex County. Housing demand associated with older seniors (75+) is largely anticipated from the existing population base and, to a lesser extent, through net migration. These socio-economic and demographic trends associated with a growing, aging and diversifying population base are also anticipated to increase the need for a broader range of rental housing options across the County.

The County-wide housing forecast includes both on-farm and off-farm households associated with migrant workers largely within the Municipality of Leamington, Town of Kingsville and Town of Essex. Collectively, these three municipalities are projected to

generate a need of approximately 2,430 new household equivalents associated with both on-farm and off-farm migrant workers.[1]

It is generally recognized that the of accommodation of skilled labour and the attraction new businesses are inextricably linked and positively reinforce one another. As such, for the Windsor-Essex economic base to grow, effort will be required to continue to attract new skilled working residents to the region with suitable employment opportunities and relatively affordable housing, to ensure that economic growth is not constrained. Attraction efforts must also be linked to housing accommodation (both ownership and rental), municipal services and infrastructure, as well as quality of life attributes which appeal to the younger mobile population, while not detracting from the region's attractiveness to older population segments.

Next Steps

The Phase 1 Growth Projection Background Report is intended to provide technical growth projection work that will be carried forward as part of the County's Phase 2 and Phase 3 work plan. This report includes three population, household and employment growth scenarios for the county as a whole and for the seven local municipalities. All three of these growth scenarios will be carried forward and utilized as part of the next phase of the County O.P. review.

[1] Forecast housing demand associated with migrant workers is anticipated to be split rather evenly between on-farm and off-farm housing options.

Appendices

Appendix A
Windsor-Essex Area Intra-Provincial Migration Trends by Age

Appendix A: Windsor-Essex Area Intra-Provincial Migration Trends by Age

Intra-provincial net migration trends in the Windsor-Essex Area illustrate that there has been a positive trend towards increased net migration from 2011 to 2021 across all age groups except for the 15-29 age group which is typically associated with students, as summarized in Figure F-2 below. This shows that a broad range of demographics is being attracted to the Windsor-Essex Area, including but not limited to families, children, working professions and seniors.

Figure A-1
Windsor-Essex Area
Intra-Provincial Migration Trends by Age Group

Total by Age Group

	0-14	15-29	30-54	55+	Total
2001-2006	-500	-2,200	1,200	-600	-2,100
2006-2011	-1,500	-3,300	-3,900	500	-8,300
2011-2016	700	-2,200	-800	800	-1,500
2016-2021	1,900	-4,900	-600	1,200	-2,300

Share by Age Group

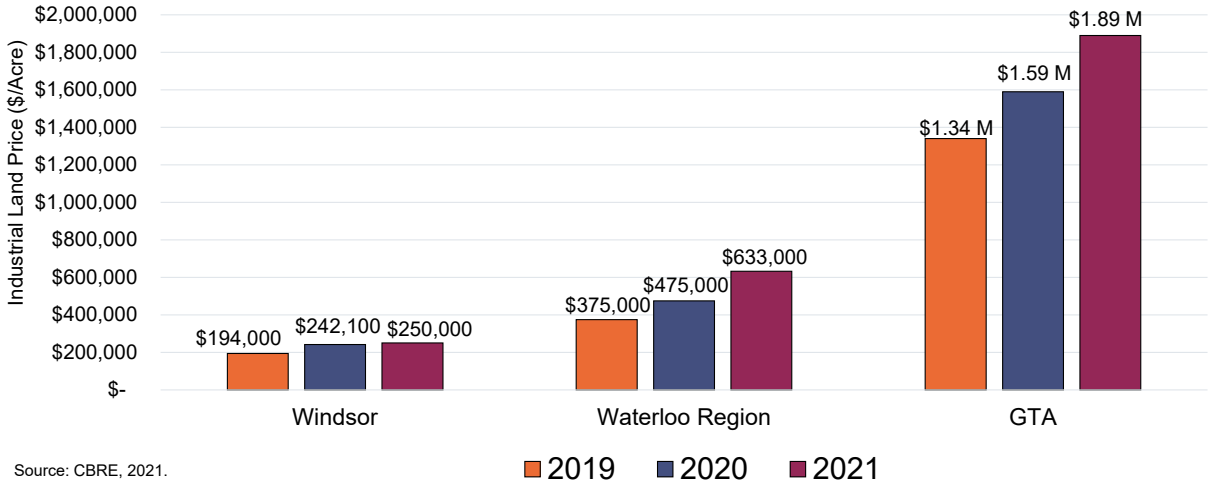
	0-14	15-29	30-54	55+	Total
2001-2006	-25%	-104%	57%	-28%	-100%
2006-2011	-18%	-40%	-47%	6%	-100%
2011-2016	44%	-141%	-53%	50%	-100%
2016-2021	84%	-214%	-24%	55%	-100%

Notes: Migration not adjusted for residual deviation.
Source: Derived from Statistics Canada Table 17-10-0140-01 Components of population change by Census division, 2016 boundaries, by Watson & Associates Economists Ltd.

Appendix B
Industrial Real Estate Trends

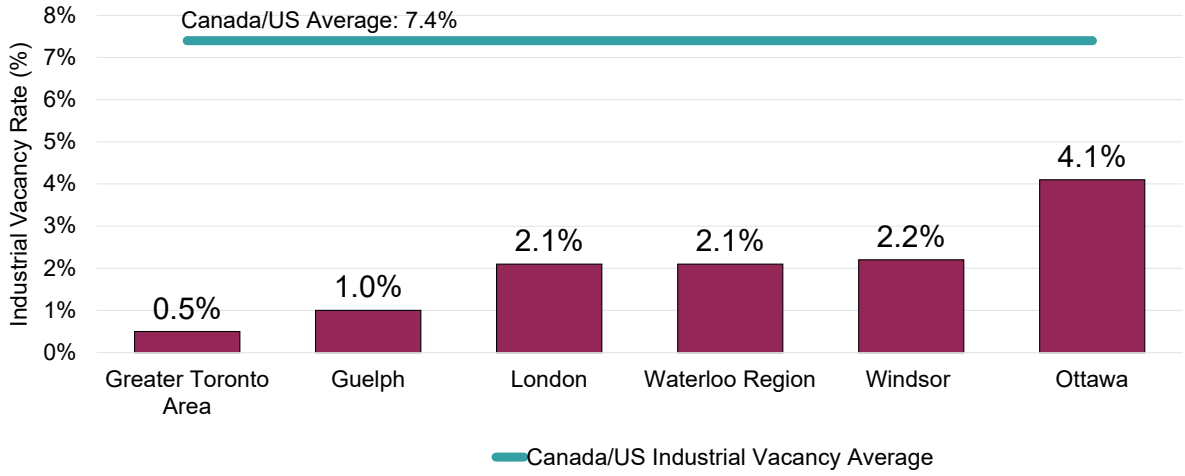
Appendix B: Industrial Real Estate Trends

Figure B-1
Price of Industrial Land ($/Acre)
Selected Ontario Markets, 2019 and 2021



Source: CBRE, 2021.

Figure B-2
Industrial Vacancy Rates
Selected Ontario Markets, 2020



Source: Derived from data from Colliers and CBRE, 2021.

Appendix C
Essex County Net Migration Trends

Appendix C: Essex County, Net Migration Trends

To a large extent, future net migration potential to Essex County is largely dependent on the total long-term net migration potential of the County. As summarized below in Figure F-1, the Province of Ontario is forecast to accommodate just under 1.1 million new migrants to between 2021 to 2026 (in accordance with the 2021 Ministry of Finance (M.O.F.) population projections. During the post 2026 period, the Province's net migration levels are forecast to decline slightly to 847,700 every five years, or 169,500 annually.

Over the past 10 years, the County's share of provincial net migration has increased from 1.3% between 2011 and 2016, to 1.6% between 2016 and 2021. Similar to the Province of Ontario, absolute net migration levels for Essex County are forecast to increase between 2021 and 2026 when compared to actual net migration levels achieved between 2011 to 2021. In contrast to the Province, forecast net migration levels for Essex County are anticipated to remain elevated relative to the 2021 to 2026 forecast period. As a result, the County's share of provincial net migration is forecast to increase over the 2026 to 2051 period to approximately 2.2%. This forecast increase in the provincial share of Essex County net migration can be attributed to the continued economic growth and competitiveness of the County's industrial and agricultural sector, as well as the County's relative attractiveness to retirees.

Figure C-1
Essex Census Division (Windsor-Essex Area) and Essex County
Population Growth, 2021 to 2051

Note: Figures may not add precisely due to rounding. Population includes net Census undercount.
Source: Ontario derived from Ministry of Finance Reference Population Projections, Essex CD from Statistics Canada Demography Division, and Essex County derived by Watson & Associates Economists Ltd.

Figures C-2, C-4 and C-6 summarize population growth in Essex County from 2021 to 2051 for the Low, Medium and High Scenarios by component including, net migration and natural increase (births less deaths). Net migration is anticipated to represent the

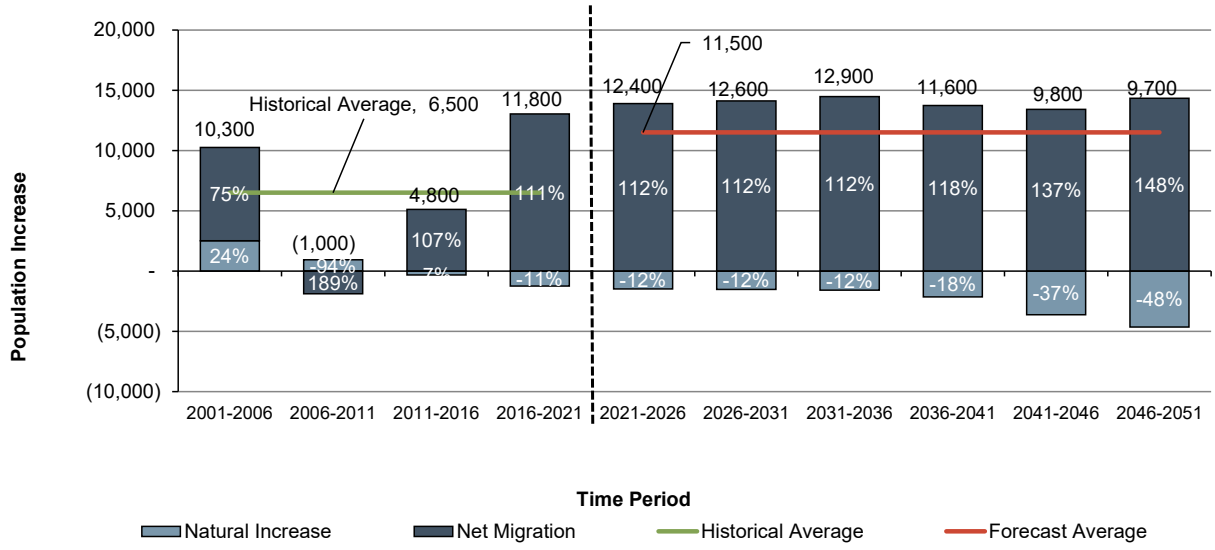
largest component of forecast population growth in Essex County. This is a result of diminished population growth from natural increase due to the aging of the population.

Key observations with respect to the components of population growth in the City of Guelph include:

- Over the 2021 to 2051 period, all population growth within Essex County is anticipated to be driven from net migration;
- The County is forecast to accommodate just over 2,800 new net migrants per year (or 14,300 migrants every five years) under the low scenario, approximately 3,800 per year (or 19,200 every five years) under the medium scenario, and approximately 4,600 per year (22,800 every five years) under the high scenario. Relative to historical trends, this represents a noticeable increase of 137% under the low scenario, 217% under the medium scenario and 277% under the high scenario to the average historical levels of net migration experienced between 2001 and 2021; and
- As previously discussed, forecast net migration in Essex County is anticipated to be largely driven by the long-term economic growth prospects in the regional economy and surrounding commuter-shed, and outward growth pressure for the G.G.H. Local housing growth opportunities targeted to a broad range of demographic groups (i.e. first-time homebuyers, families, empty nesters and seniors) and the County's attractiveness as a place to work, live and study also represent key drivers of net future migration within the County.

Figures C-3, C-5 and C-7 summarize net migration in Essex County for the Low, Medium and High Scenarios by age of migrant. The County is anticipated to experience relatively strong net migration across all major age groups, most notably the 0 to 19 and 35 to 44 age groups.

Figure C-2
Essex County
Historical and Forecast Component of Population Growth, Low Scenario, 2021 to 2051



Note: Figures have been rounded. Population includes net Census.
Source: Derived from Statistics Canada Census and Demography Division, 2001 to 2021, and 2021-2051 forecast by Watson & Associates Economists Ltd.

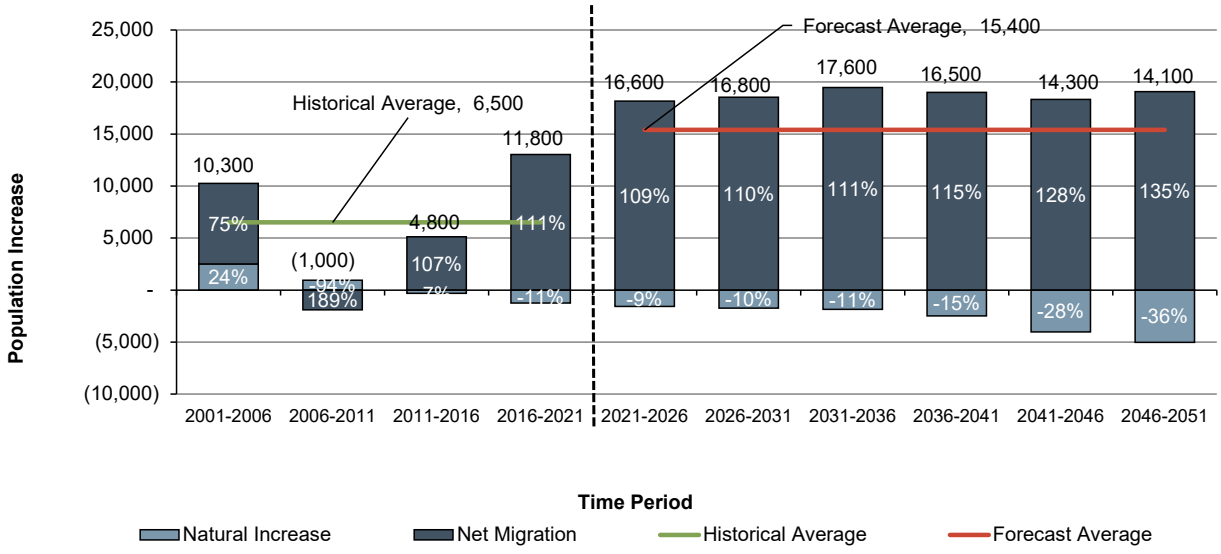
Figure C-3
Essex County
Historical and Forecast Net Migration by Age Cohort, Low Scenario, 2021 to 2051

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	3,800	2,200	4,600	6,900	6,800	6,800	6,700	6,300	6,700	6,800
20-34	(500)	(5,100)	(3,300)	(200)	600	600	800	800	900	900
35-44	2,500	0	2,000	4,000	3,600	3,700	3,800	3,700	3,800	3,800
45-54	600	(600)	500	700	1,100	1,200	1,300	1,200	1,300	1,300
55-74	700	900	1,000	1,400	1,500	1,500	1,600	1,500	1,400	1,300
75+	600	600	300	300	500	500	500	500	400	300
Total	**7,700**	**(1,900)**	**5,100**	**13,200**	**14,100**	**14,400**	**14,600**	**13,900**	**14,400**	**14,500**

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	49%	-118%	90%	52%	48%	48%	46%	45%	47%	47%
20-34	-7%	268%	-65%	-2%	4%	5%	5%	6%	6%	7%
35-44	32%	0%	40%	30%	25%	26%	26%	26%	26%	27%
45-54	8%	31%	10%	6%	8%	8%	9%	9%	9%	9%
55-74	9%	-47%	19%	11%	11%	11%	11%	11%	10%	9%
75+	8%	-33%	6%	2%	4%	4%	4%	4%	2%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Figures have been rounded.
Source: 2001 to 2021 derived from Statistics Canada Census and Demography Division data, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure C-4
Essex County
Historical and Forecast Net Migration, Medium Scenario, 2021 to 2051



Note: Figures have been rounded. Population includes net Census.
Source: Derived from Statistics Canada Canada and Demography Division, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

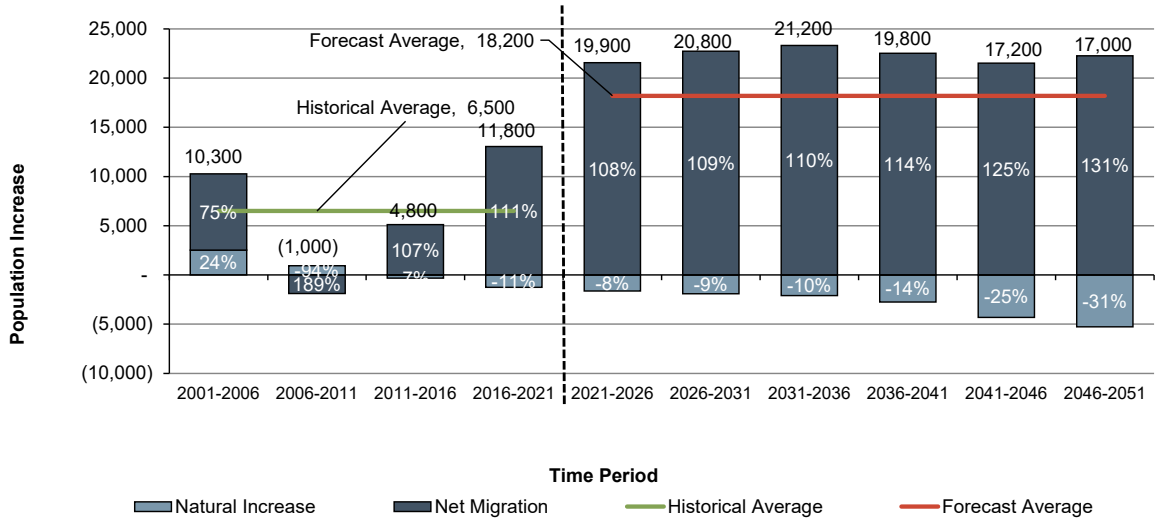
Figure C-5
Essex County
Historical and Forecast Net Migration by Age Cohort, Medium Scenario, 2021 to 2051

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	3,800	2,200	4,600	6,900	8,800	8,900	9,000	8,700	9,200	9,100
20-34	(500)	(5,100)	(3,300)	(200)	700	800	1,000	1,100	1,200	1,300
35-44	2,500	0	2,000	4,000	4,600	4,800	5,200	5,000	5,200	5,100
45-54	600	(600)	500	700	1,500	1,600	1,700	1,700	1,700	1,700
55-74	700	900	1,000	1,400	2,000	2,000	2,100	2,100	1,900	1,800
75+	600	600	300	300	700	700	700	700	500	400
Total	**7,700**	**(1,900)**	**5,100**	**13,200**	**18,400**	**18,800**	**19,700**	**19,200**	**19,700**	**19,300**

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	49%	-118%	90%	52%	48%	48%	46%	45%	47%	47%
20-34	-7%	268%	-65%	-2%	4%	5%	5%	6%	6%	7%
35-44	32%	0%	40%	30%	25%	26%	26%	26%	26%	27%
45-54	8%	31%	10%	6%	8%	8%	9%	9%	9%	9%
55-74	9%	-47%	19%	11%	11%	11%	11%	11%	10%	9%
75+	8%	-33%	6%	2%	4%	4%	4%	4%	2%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Figures have been rounded.
Source: 2001 to 2021 derived from Statistics Canada Census and Demography Division data, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure C-6
Essex County
Historical and Forecast Net Migration, High Scenario, 2021 to 2051



Note: Figures have been rounded. Population includes net Census.
Source: Derived from Statistics Canada Census and Demography Division, 2001 to 2021, and 2021-2051 forecast by Watson & Associates Economists Ltd.

Figure C-7
Essex County
Historical and Forecast Net Migration by Age Cohort, High Scenario, 2021 to 2051

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	3,800	2,200	4,600	6,900	10,500	11,000	10,800	10,300	10,800	10,600
20-34	(500)	(5,100)	(3,300)	(200)	900	1,000	1,200	1,300	1,400	1,500
35-44	2,500	0	2,000	4,000	5,500	5,900	6,200	6,000	6,100	6,000
45-54	600	(600)	500	700	1,800	1,900	2,100	2,000	2,000	2,000
55-74	700	900	1,000	1,400	2,400	2,400	2,500	2,400	2,200	2,000
75+	600	600	300	300	800	800	800	800	600	500
Total	**7,700**	**(1,900)**	**5,100**	**13,200**	**21,800**	**23,000**	**23,600**	**22,800**	**23,100**	**22,500**

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	49%	-118%	90%	52%	48%	48%	46%	45%	47%	47%
20-34	-7%	268%	-65%	-2%	4%	5%	5%	6%	6%	7%
35-44	32%	0%	40%	30%	25%	26%	26%	26%	26%	27%
45-54	8%	31%	10%	6%	8%	8%	9%	9%	9%	9%
55-74	9%	-47%	19%	11%	11%	11%	11%	11%	10%	9%
75+	8%	-33%	6%	2%	4%	4%	4%	4%	2%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Figures have been rounded.
Source: 2001 to 2021 derived from Statistics Canada Census and Demography Division data, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Appendix D
Essex County Housing Headship Rates, 2006 to 2051

Appendix D: Essex County Headship Rates, 2021 to 2051

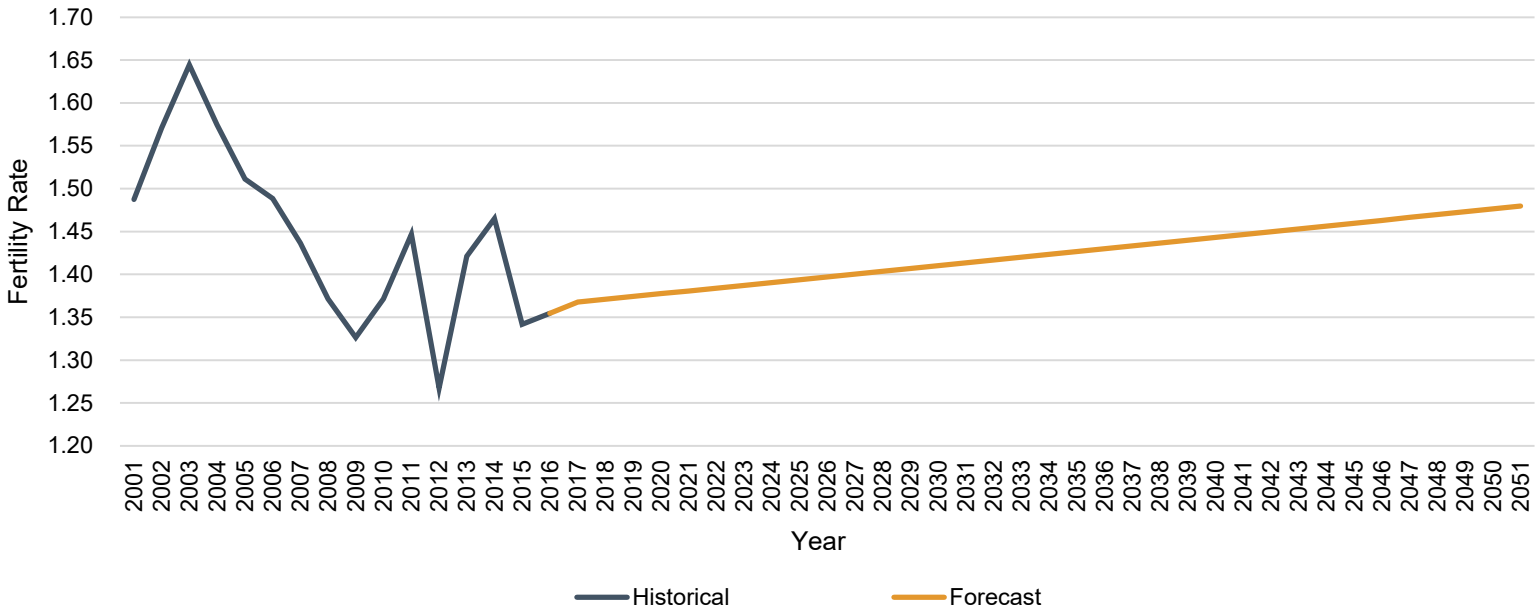
Figure D-1: Essex County, Housing Headship Rates, 2021 to 2051

Age Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-14	-	-	-	-	-	-	-	-	-	-
15-24	0.04238	0.03264	0.03481	0.03425	0.03425	0.03425	0.03425	0.03425	0.03425	0.03425
25-34	0.35979	0.33189	0.32687	0.32165	0.32165	0.32165	0.32165	0.32165	0.32165	0.32165
35-44	0.47652	0.47773	0.47431	0.46674	0.46674	0.46674	0.46674	0.46674	0.46674	0.46674
45-54	0.53238	0.53358	0.52094	0.51263	0.51263	0.51263	0.51263	0.51263	0.51263	0.51263
55-64	0.55213	0.55098	0.54723	0.53849	0.53849	0.53849	0.53849	0.53849	0.53849	0.53849
65-74	0.58311	0.58827	0.58155	0.57227	0.57227	0.57227	0.57227	0.57227	0.57227	0.57227
75+	0.60610	0.60817	0.58063	0.57136	0.57136	0.57136	0.57136	0.57136	0.57136	0.57136
Total	**0.33946**	**0.35315**	**0.35940**	**0.35860**	**0.35954**	**0.36024**	**0.36021**	**0.36210**	**0.36523**	**0.36835**

Appendix E
Essex County Population and Housing Forecast, 2021 to 2051

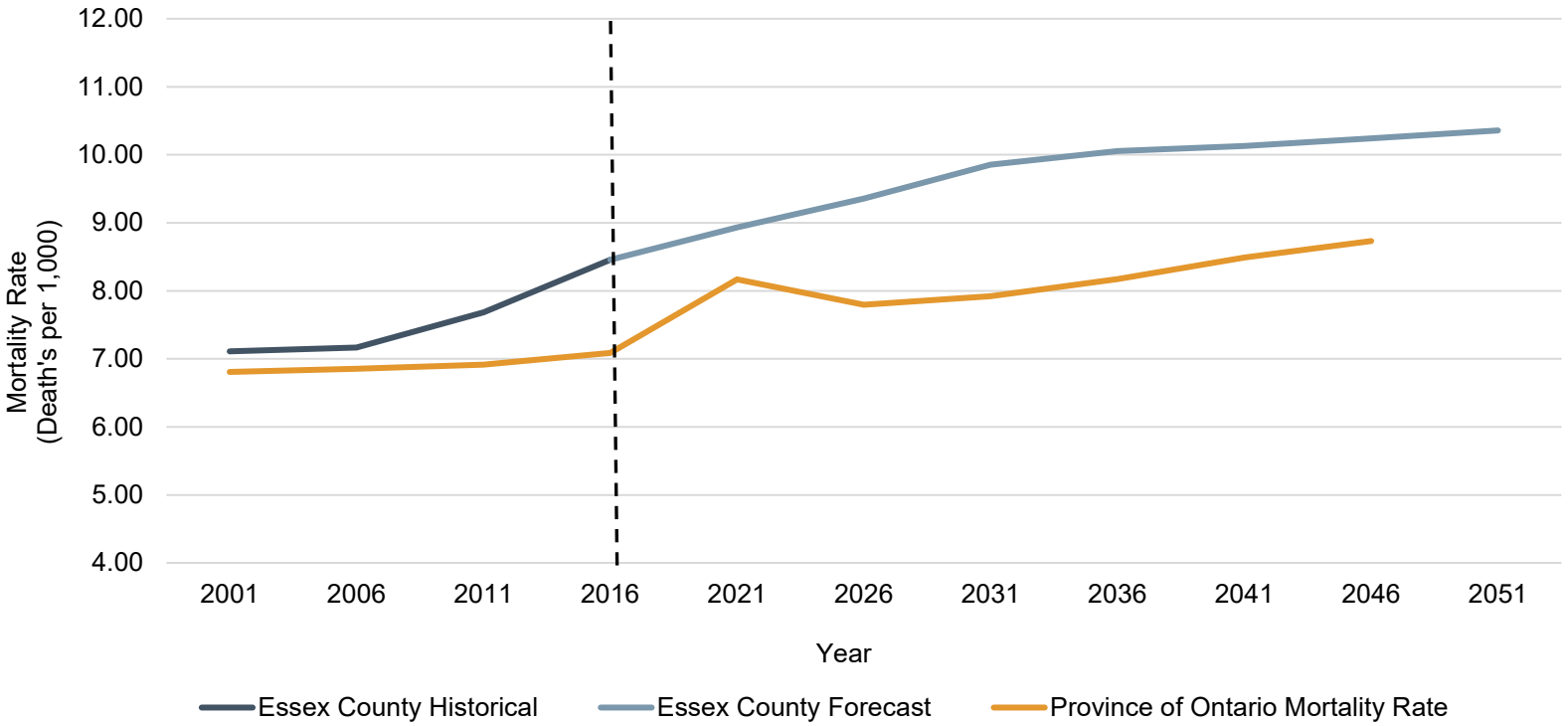
Appendix E: Essex County Population and Housing Growth Forecast, 2021 to 2051

Figure E-1: Essex County, Fertility Rates, 2016 to 2051



Source: Historical fertility rate data by age of mother provided by Vital Statistics, Ontario, Office of the Registrar General. Total fertility rate data provided by Statistics Canada Demography Division (Catalogue no. 91C0005). Fertility rate forecast prepared by Watson & Associates Economists Ltd.
Note: Province of Ontario fertility rate forecast (reference scenario) is assumed to increase from 1.4 to 1.5 between 2021 and 2046, in accordance with the Ministry of Finance (M.O.F.), Ontario Population Projections Update, Spring 2021.

Figure E-2: Essex County, Mortality Rates, 2016 to 2051



Source: Statistics Canada Demography Division (Catalogue no. 91C0005). Essex County mortality rate from 2016 to 2051 forecast prepared by Watson & Associates Economists Ltd. Province of Ontario mortality rate forecast derived from Ministry of Finance (M.O.F.), Ontario Population Projections Update, Spring 2021.

Low Scenario

Figure E-3a: Essex County, Low Scenario Population Forecast by Major Age Group, 2016 to 2051

Cohort	2016	2021	2026	2031	2036	2041	2046	2051
0-19	44,000	45,300	46,700	48,900	50,600	52,600	53,100	53,200
20-34	30,600	33,100	37,200	39,600	41,900	42,800	44,000	45,000
35-44	24,000	24,200	23,400	24,900	28,600	30,600	31,700	33,300
45-54	29,000	27,300	27,400	27,600	26,900	28,500	32,100	34,200
55-64	27,400	30,100	29,600	28,500	28,800	29,000	28,500	30,100
65-74	19,100	23,100	26,200	28,900	28,700	27,900	28,300	28,600
75+	13,100	15,900	20,900	25,800	31,600	37,100	40,800	43,500
Total	**187,300**	**199,100**	**211,500**	**224,100**	**237,000**	**248,600**	**258,400**	**268,100**

Figure E-3b: Essex County, Low Scenario Population Forecast Shares by Major Age Group, 2016 to 2051

Cohort	2016	2021	2026	2031	2036	2041	2046	2051
0-19	24%	23%	22%	22%	21%	21%	21%	20%
20-34	16%	17%	18%	18%	18%	17%	17%	17%
35-44	13%	12%	11%	11%	12%	12%	12%	12%
45-54	16%	14%	13%	12%	11%	11%	12%	13%
55-64	15%	15%	14%	13%	12%	12%	11%	11%
65-74	10%	12%	12%	13%	12%	11%	11%	11%
75+	7%	8%	10%	12%	13%	15%	16%	16%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 and 2021 derived from Statistics Canada Census and Demography Division data. 2021 to 2051 derived by Watson & Associates Economists Ltd.

Medium Scenario

Figure E-4a: Essex County, Medium Scenario Population Forecast by Major Age Group, 2016 to 2051

Cohort	2016	2021	2026	2031	2036	2041	2046	2051
0-19	44,000	45,300	48,700	52,800	56,300	59,700	60,700	61,800
20-34	30,600	33,100	37,500	40,400	43,600	46,100	49,300	51,900
35-44	24,000	24,200	24,300	26,200	30,200	32,600	34,200	36,600
45-54	29,000	27,300	27,800	28,700	29,000	31,200	35,100	37,600
55-64	27,400	30,100	30,000	29,200	29,900	30,900	31,400	33,500
65-74	19,100	23,100	26,400	29,300	29,400	29,000	29,700	30,600
75+	13,100	15,900	20,900	25,900	31,600	37,000	40,500	43,000
Total	**187,300**	**199,100**	**215,700**	**232,500**	**250,100**	**266,600**	**280,900**	**295,000**

Figure E-4b: Essex County, Medium Scenario Population Forecast Shares by Major Age Group, 2016 to 2051

Cohort	2016	2021	2026	2031	2036	2041	2046	2051
0-19	24%	23%	23%	23%	23%	22%	22%	21%
20-34	16%	17%	17%	17%	17%	17%	18%	18%
35-44	13%	12%	11%	11%	12%	12%	12%	12%
45-54	16%	14%	13%	12%	12%	12%	13%	13%
55-64	15%	15%	14%	13%	12%	12%	11%	11%
65-74	10%	12%	12%	13%	12%	11%	11%	10%
75+	7%	8%	10%	11%	13%	14%	14%	15%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 and 2021 derived from Statistics Canada Census and Demography Division data. 2021 to 2051 derived by Watson & Associates Economists Ltd.

High Scenario

Figure E-5a: Essex County, High Scenario Population Forecast by Major Age Group, 2016 to 2051

Cohort	2016	2021	2026	2031	2036	2041	2046	2051
0-19	44,000	45,300	50,300	56,200	61,100	65,200	66,400	67,800
20-34	30,600	33,100	37,700	41,100	45,000	48,800	53,500	57,300
35-44	24,000	24,200	25,000	27,400	31,600	34,100	36,100	38,900
45-54	29,000	27,300	28,200	29,700	30,800	33,400	37,400	40,000
55-64	27,400	30,100	30,200	29,800	30,800	32,500	33,600	36,100
65-74	19,100	23,100	26,600	29,700	30,000	29,800	30,800	32,200
75+	13,100	15,900	21,000	25,900	31,600	37,000	40,300	42,700
Total	**187,300**	**199,100**	**219,000**	**239,800**	**261,000**	**280,800**	**298,000**	**315,000**

Figure E-5b: Essex County, High Scenario Population Forecast Shares by Major Age Group, 2016 to 2051

Cohort	2016	2021	2026	2031	2036	2041	2046	2051
0-19	24%	23%	23%	23%	23%	23%	22%	22%
20-34	16%	17%	17%	17%	17%	17%	18%	18%
35-44	13%	12%	11%	11%	12%	12%	12%	12%
45-54	16%	14%	13%	12%	12%	12%	13%	13%
55-64	15%	15%	14%	12%	12%	12%	11%	11%
65-74	10%	12%	12%	12%	11%	11%	10%	10%
75+	7%	8%	10%	11%	12%	13%	14%	14%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 and 2021 derived from Statistics Canada Census and Demography Division data. 2021 to 2051 derived by Watson & Associates Economists Ltd.

Low Scenario

Figure E-6: Essex County, Low Scenario Residential Forecast, 2021 to 2051

Year		Population (Including Census undercount)[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Person Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings[2]	Apartments[3]	Other	Total Households		
Historical	*Mid-2016*	187,300	181,500	4,700	176,800	58,480	3,570	4,550	750	67,340	2.78	2.70
	Mid-2021	199,100	193,000	5,000	187,900	61,850	3,740	5,010	790	71,390	2.77	2.69
Forecast	*Mid-2026*	211,500	205,000	5,300	199,700	64,600	4,770	6,380	790	76,540	2.76	2.68
	Mid-2031	224,100	217,200	5,700	211,500	67,240	6,170	7,520	790	81,720	2.74	2.66
	Mid-2036	237,000	229,700	6,000	223,700	69,750	7,610	8,700	790	86,850	2.73	2.65
	Mid-2041	248,600	241,000	6,300	234,700	72,150	9,090	9,920	790	91,950	2.70	2.62
	Mid-2046	258,400	250,500	6,500	243,900	74,230	10,420	11,120	790	96,560	2.68	2.59
	Mid-2051	268,100	259,900	6,800	253,100	76,200	11,760	12,410	790	101,150	2.65	2.57
Incremental	**Mid-2016 to Mid-2021**	11,800	11,500	300	11,100	3,370	170	460	40	4,050		
	Mid-2021 to Mid-2026	12,400	12,000	300	11,800	2,750	1,030	1,370	0	5,150		
	Mid-2021 to Mid-2031	25,000	24,200	700	23,600	5,390	2,430	2,510	0	10,330		
	Mid-2021 to Mid-2036	37,900	36,700	1,000	35,800	7,900	3,870	3,690	0	15,460		
	Mid-2021 to Mid-2041	49,500	48,000	1,300	46,800	10,300	5,350	4,910	0	20,560		
	Mid-2021 to Mid-2046	59,300	57,500	1,500	56,000	12,380	6,680	6,110	0	25,170		
	Mid-2021 to Mid-2051	69,000	66,900	1,800	65,200	14,350	8,020	7,400	0	29,760		

[1] Census undercount estimated at approximately 3.2%.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.
Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 and 2021 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Medium Scenario

Figure E-7: Essex County, Medium Scenario Residential Forecast, 2021 to 2051

Year		Population (Including Census undercount)[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Person Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings[2]	Apartments[3]	Other	Total Households		
Historical	*Mid-2016*	187,300	181,500	4,700	176,800	58,480	3,570	4,550	750	67,340	2.78	2.70
	Mid-2021	199,100	193,000	5,000	187,900	61,850	3,740	5,010	790	71,390	2.78	2.70
Forecast	*Mid-2026*	215,700	209,000	5,500	203,600	65,120	5,040	6,600	790	77,550	2.78	2.70
	Mid-2031	232,500	225,300	5,900	219,500	68,280	6,710	7,960	790	83,740	2.78	2.69
	Mid-2036	250,100	242,400	6,300	236,100	71,390	8,480	9,420	790	90,090	2.78	2.69
	Mid-2041	266,600	258,400	6,700	251,700	74,430	10,360	10,970	790	96,550	2.76	2.68
	Mid-2046	280,900	272,300	7,100	265,200	77,160	12,120	12,550	790	102,610	2.74	2.65
	Mid-2051	295,000	285,900	7,500	278,500	79,760	13,870	14,240	790	108,670	2.71	2.63
Incremental	**Mid-2016 to Mid-2021**	11,800	11,500	300	11,100	3,370	170	460	40	4,050		
	Mid-2021 to Mid-2026	16,600	16,000	500	15,700	3,270	1,300	1,590	0	6,160		
	Mid-2021 to Mid-2031	33,400	32,300	900	31,600	6,430	2,970	2,950	0	12,350		
	Mid-2021 to Mid-2036	51,000	49,400	1,300	48,200	9,540	4,740	4,410	0	18,700		
	Mid-2021 to Mid-2041	67,500	65,400	1,700	63,800	12,580	6,620	5,960	0	25,160		
	Mid-2021 to Mid-2046	81,800	79,300	2,100	77,300	15,310	8,380	7,540	0	31,220		
	Mid-2021 to Mid-2051	95,900	92,900	2,500	90,600	17,910	10,130	9,230	0	37,280		

[1] Census undercount estimated at approximately 3.2%.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.
Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 and 2021 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

High Scenario

Figure E-8: Essex County, High Scenario Residential Forecast, 2021 to 2051

	Year	Population (Including Census undercount)[1]	...cluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Person Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings[2]	Apartments[3]	Other	Total Households		
Historical	*Mid-2016*	187,300	181,500	4,700	176,800	58,480	3,570	4,550	750	67,340	2.78	2.70
	Mid-2021	199,100	193,000	5,000	187,900	61,850	3,740	5,010	790	71,390	2.79	2.71
Forecast	*Mid-2026*	219,000	212,300	5,500	206,700	65,540	5,240	6,780	790	78,350	2.80	2.71
	Mid-2031	239,800	232,400	6,100	226,400	69,190	7,180	8,350	790	85,510	2.80	2.72
	Mid-2036	261,000	253,000	6,600	246,400	72,760	9,210	10,020	790	92,790	2.81	2.73
	Mid-2041	280,800	272,200	7,100	265,100	76,220	11,350	11,790	790	100,160	2.80	2.72
	Mid-2046	298,000	288,800	7,500	281,300	79,400	13,400	13,630	790	107,220	2.78	2.69
	Mid-2051	315,000	305,300	8,000	297,400	82,450	15,460	15,620	790	114,330	2.76	2.67
Incremental	**Mid-2016 to Mid-2021**	11,800	11,500	300	11,100	3,370	170	460	40	4,050		
	Mid-2021 to Mid-2026	19,900	19,300	500	18,800	3,690	1,500	1,770	0	6,960		
	Mid-2021 to Mid-2031	40,700	39,400	1,100	38,500	7,340	3,440	3,340	0	14,120		
	Mid-2021 to Mid-2036	61,900	60,000	1,600	58,500	10,910	5,470	5,010	0	21,400		
	Mid-2021 to Mid-2041	81,700	79,200	2,100	77,200	14,370	7,610	6,780	0	28,770		
	Mid-2021 to Mid-2046	98,900	95,800	2,500	93,400	17,550	9,660	8,620	0	35,830		
	Mid-2021 to Mid-2051	115,900	112,300	3,000	109,500	20,600	11,720	10,610	0	42,940		

[1] Census undercount estimated at approximately 3.2%.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.
Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 and 2021 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Appendix F
Essex County Employment Forecast

Appendix F: Essex County Employment Growth Forecast, 2021 to 2051

Figure F-1a: Essex County, Low Scenario Employment Growth Forecast by Major Sector, 2021 to 2051

Period	Population Including Undercount	Activity Rate								Employment							
		Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W.[1]	Total Including N.F.P.O.W.	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W.[1]	Total Employment (Including N.F.P.O.W.)
Mid 2006	183,500	0.022	0.034	0.121	0.098	0.045	0.320	0.037	0.357	4,120	6,210	22,190	17,980	8,230	58,720	6,820	65,540
Mid 2011	182,500	0.019	0.026	0.101	0.090	0.049	0.285	0.041	0.326	3,440	4,730	18,520	16,510	8,910	52,100	7,410	59,510
Mid 2016	187,300	0.020	0.025	0.126	0.098	0.051	0.319	0.043	0.363	3,720	4,700	23,650	18,270	9,470	59,810	8,150	67,960
Mid 2021	199,100	0.032	0.028	0.126	0.085	0.049	0.319	0.044	0.363	6,410	5,500	25,070	16,830	9,710	63,520	8,760	72,280
Mid 2026	211,500	0.039	0.028	0.127	0.088	0.049	0.330	0.044	0.374	8,350	5,950	26,860	18,260	10,290	69,710	9,360	79,070
Mid 2031	224,100	0.045	0.029	0.127	0.093	0.050	0.341	0.044	0.385	10,110	6,490	28,460	20,340	11,020	76,420	9,970	86,390
Mid 2036	237,000	0.050	0.030	0.127	0.095	0.050	0.349	0.045	0.393	11,780	7,010	30,100	22,030	11,710	82,630	10,600	93,230
Mid 2041	248,600	0.054	0.030	0.127	0.096	0.051	0.354	0.045	0.399	13,360	7,470	31,570	23,380	12,340	88,120	11,180	99,310
Mid 2046	258,400	0.054	0.030	0.127	0.097	0.051	0.356	0.045	0.401	14,010	7,790	32,820	24,490	12,840	91,940	11,690	103,630
Mid 2051	268,100	0.054	0.030	0.127	0.098	0.051	0.357	0.045	0.402	14,610	8,110	34,050	25,600	13,330	95,690	12,200	107,890
Incremental Change																	
Mid 2006 - Mid 2011	-1,000	-0.004	-0.008	-0.019	-0.008	0.004	-0.035	0.003	-0.031	-690	-1,490	-3,670	-1,470	690	-6,630	600	-6,030
Mid 2011 - Mid 2016	4,800	0.001	-0.001	0.025	0.007	0.002	0.034	0.003	0.037	290	-30	5,130	1,770	560	7,720	740	8,450
Mid 2016 - Mid 2021	11,800	0.012	0.003	0.000	-0.013	-0.002	0.000	0.001	0.000	2,690	800	1,420	-1,440	240	3,710	610	4,330
Mid 2021 - Mid 2031	25,000	0.013	0.001	0.001	0.008	0.001	0.022	0.001	0.022	3,700	990	3,390	3,510	1,310	12,900	1,210	14,110
Mid 2021 - Mid 2041	49,500	0.022	0.002	0.001	0.012	0.002	0.035	0.001	0.036	6,950	1,970	6,500	6,550	2,630	24,600	2,430	27,020
Mid 2021 - Mid 2051	69,000	0.022	0.003	0.001	0.013	0.002	0.038	0.002	0.039	8,200	2,610	8,970	8,770	3,620	32,170	3,440	35,610
Annual Average																	
Mid 2006 - Mid 2011	-200	-0.001	-0.002	-0.004	-0.002	0.001	-0.007	0.001	-0.006	-138	-298	-734	-294	138	-1,326	120	-1,206
Mid 2011 - Mid 2016	960	0.000	0.000	0.005	0.001	0.000	0.007	0.001	0.007	58	-6	1,026	354	112	1,544	148	1,690
Mid 2016 - Mid 2021	2,360	0.002	0.001	0.000	-0.003	0.000	0.000	0.000	0.000	538	160	284	-288	48	742	122	866
Mid 2021 - Mid 2031	2,500	0.001	0.000	0.000	0.001	0.000	0.002	0.000	0.002	370	99	339	351	131	1,290	121	1,411
Mid 2021 - Mid 2041	2,475	0.001	0.000	0.000	0.001	0.000	0.002	0.000	0.002	348	99	325	328	132	1,230	122	1,351
Mid 2021 - Mid 2051	2,300	0.001	0.000	0.000	0.000	0.000	0.001	0.000	0.001	273	87	299	292	121	1,072	115	1,187

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.

Source: 2006 to 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure F-1b: Essex County, Low Scenario Employment Growth Forecast by Employment Category, 2021 to 2051

Timing	Employment Land Employment	Major Office Employment	Population-Related Employment	Rural	Total
2021 - 2026	2,290	0	2,530	1,960	6,780
2021 - 2031	4,470	0	5,900	3,740	14,110
2021 - 2036	6,660	0	8,850	5,430	20,950
2021 - 2041	8,630	0	11,370	7,020	27,020
2021 - 2046	10,290	0	13,370	7,690	31,350
2021 - 2051	11,930	0	15,370	8,300	35,610

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure F-2a: Essex County, Medium Scenario Employment Growth Forecast by Major Sector, 2021 to 2051

Period	Population Including Undercount	Activity Rate								Employment							
		Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W.[1]	Total Including N.F.P.O.W.	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W.[1]	Total Employment (Including N.F.P.O.W.)
Mid 2006	183,500	0.022	0.034	0.121	0.098	0.045	0.320	0.037	0.357	4,120	6,210	22,190	17,980	8,230	58,720	6,820	65,540
Mid 2011	182,500	0.019	0.026	0.101	0.090	0.049	0.285	0.041	0.326	3,440	4,730	18,520	16,510	8,910	52,100	7,410	59,510
Mid 2016	187,300	0.020	0.025	0.126	0.098	0.051	0.319	0.043	0.363	3,720	4,700	23,650	18,270	9,470	59,810	8,150	67,960
Mid 2021	199,100	0.032	0.028	0.126	0.085	0.049	0.319	0.044	0.363	6,410	5,500	25,070	16,830	9,710	63,520	8,760	72,280
Mid 2026	215,700	0.039	0.028	0.127	0.088	0.049	0.329	0.044	0.373	8,350	6,070	27,390	18,630	10,480	70,920	9,540	80,460
Mid 2031	232,500	0.043	0.029	0.127	0.093	0.050	0.339	0.044	0.384	10,110	6,710	29,520	21,130	11,430	78,900	10,340	89,240
Mid 2036	250,100	0.047	0.029	0.127	0.095	0.050	0.346	0.045	0.391	11,780	7,340	31,760	23,300	12,360	86,540	11,190	97,730
Mid 2041	266,600	0.050	0.030	0.127	0.096	0.051	0.351	0.045	0.396	13,360	7,930	33,860	25,140	13,250	93,540	11,990	105,540
Mid 2046	280,900	0.050	0.030	0.127	0.097	0.051	0.351	0.045	0.397	14,010	8,370	35,680	26,710	13,980	98,740	12,710	111,450
Mid 2051	295,000	0.050	0.030	0.127	0.098	0.051	0.352	0.045	0.397	14,610	8,800	37,460	28,260	14,690	103,830	13,420	117,250
Incremental Change																	
Mid 2006 - Mid 2011	-1,000	-0.004	-0.008	-0.019	-0.008	0.004	-0.035	0.003	-0.031	-690	-1,490	-3,670	-1,470	690	-6,630	600	-6,030
Mid 2011 - Mid 2016	4,800	0.001	-0.001	0.025	0.007	0.002	0.034	0.003	0.037	290	-30	5,130	1,770	560	7,720	740	8,450
Mid 2016 - Mid 2021	11,800	0.012	0.003	0.000	-0.013	-0.002	0.000	0.001	0.000	2,690	800	1,420	-1,440	240	3,710	610	4,330
Mid 2021 - Mid 2031	33,400	0.011	0.001	0.001	0.008	0.001	0.020	0.001	0.021	3,700	1,210	4,450	4,300	1,720	15,370	1,580	16,960
Mid 2021 - Mid 2041	67,500	0.018	0.002	0.001	0.012	0.002	0.032	0.001	0.033	6,950	2,430	8,790	8,310	3,540	30,020	3,240	33,250
Mid 2021 - Mid 2051	95,900	0.017	0.002	0.001	0.013	0.002	0.033	0.002	0.034	8,200	3,300	12,390	11,430	4,980	40,300	4,660	44,970
Annual Average																	
Mid 2006 - Mid 2011	-200	-0.001	-0.002	-0.004	-0.002	0.001	-0.007	0.001	-0.006	-138	-298	-734	-294	138	-1,326	120	-1,206
Mid 2011 - Mid 2016	960	0.000	0.000	0.005	0.001	0.000	0.007	0.001	0.007	58	-6	1,026	354	112	1,544	148	1,690
Mid 2016 - Mid 2021	2,360	0.002	0.001	0.000	-0.003	0.000	0.000	0.000	0.000	538	160	284	-288	48	742	122	866
Mid 2021 - Mid 2031	3,340	0.001	0.000	0.000	0.001	0.000	0.002	0.000	0.002	370	121	445	430	172	1,537	158	1,696
Mid 2021 - Mid 2041	3,375	0.001	0.000	0.000	0.001	0.000	0.002	0.000	0.002	348	122	440	416	177	1,501	162	1,663
Mid 2021 - Mid 2051	3,197	0.001	0.000	0.000	0.000	0.000	0.001	0.000	0.001	273	110	413	381	166	1,343	155	1,499

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.

Source: 2006 to 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure F-2b: Essex County, Medium Scenario Employment Growth Forecast by Employment Category, 2021 to 2051

Timing	Employment Land Employment	Major Office Employment	Population-Related Employment	Rural	Total
2021 - 2026	2,970	0	3,240	1,970	8,180
2021 - 2031	5,840	0	7,370	3,750	16,960
2021 - 2036	8,810	0	11,190	5,450	25,450
2021 - 2041	11,580	0	14,620	7,050	33,250
2021 - 2046	13,990	0	17,450	7,720	39,160
2021 - 2051	16,360	0	20,260	8,340	44,970

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure F-3a: Essex County, High Scenario Employment Growth Forecast by Major Sector, 2021 to 2051

Period	Population Including Undercount	Activity Rate								Employment							
		Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W.[1]	Total Including N.F.P.O.W.	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W.[1]	Total Employment (Including N.F.P.O.W.)
Mid 2006	183,500	0.022	0.034	0.121	0.098	0.045	0.320	0.037	0.357	4,120	6,210	22,190	17,980	8,230	58,720	6,820	65,540
Mid 2011	182,500	0.019	0.026	0.101	0.090	0.049	0.285	0.041	0.326	3,440	4,730	18,520	16,510	8,910	52,100	7,410	59,510
Mid 2016	187,300	0.020	0.025	0.126	0.098	0.051	0.319	0.043	0.363	3,720	4,700	23,650	18,270	9,470	59,810	8,150	67,960
Mid 2021	199,100	0.032	0.028	0.126	0.085	0.049	0.319	0.044	0.363	6,410	5,500	25,070	16,830	9,710	63,520	8,760	72,280
Mid 2026	219,000	0.038	0.028	0.127	0.088	0.049	0.328	0.044	0.372	8,350	6,160	27,810	18,920	10,640	71,890	9,690	81,570
Mid 2031	239,800	0.042	0.029	0.127	0.093	0.050	0.338	0.044	0.383	10,110	6,920	30,450	21,800	11,790	81,070	10,670	91,730
Mid 2036	261,000	0.045	0.029	0.127	0.095	0.050	0.344	0.045	0.389	11,780	7,660	33,150	24,320	12,900	89,800	11,680	101,480
Mid 2041	280,800	0.048	0.030	0.127	0.096	0.051	0.348	0.045	0.393	13,360	8,350	35,660	26,480	13,950	97,800	12,630	110,440
Mid 2046	298,000	0.047	0.030	0.127	0.097	0.051	0.349	0.045	0.394	14,010	8,880	37,840	28,330	14,820	103,880	13,480	117,360
Mid 2051	315,000	0.046	0.030	0.127	0.098	0.051	0.349	0.045	0.394	14,610	9,400	40,000	30,180	15,680	109,880	14,330	124,210
Incremental Change																	
Mid 2006 - Mid 2011	-1,000	-0.004	-0.008	-0.019	-0.008	0.004	-0.035	0.003	-0.031	-690	-1,490	-3,670	-1,470	690	-6,630	600	-6,030
Mid 2011 - Mid 2016	4,800	0.001	-0.001	0.025	0.007	0.002	0.034	0.003	0.037	290	-30	5,130	1,770	560	7,720	740	8,450
Mid 2016 - Mid 2021	11,800	0.012	0.003	0.000	-0.013	-0.002	0.000	0.001	0.000	2,690	800	1,420	-1,440	240	3,710	610	4,330
Mid 2021 - Mid 2031	40,700	0.010	0.001	0.001	0.008	0.001	0.019	0.001	0.019	3,700	1,420	5,380	4,970	2,080	17,540	1,910	19,450
Mid 2021 - Mid 2041	81,700	0.015	0.002	0.001	0.012	0.002	0.029	0.001	0.030	6,950	2,850	10,590	9,650	4,240	34,280	3,880	38,150
Mid 2021 - Mid 2051	115,900	0.014	0.002	0.001	0.013	0.002	0.030	0.002	0.031	8,200	3,900	14,930	13,350	5,980	46,350	5,570	51,920
Annual Average																	
Mid 2006 - Mid 2011	-200	-0.001	-0.002	-0.004	-0.002	0.001	-0.007	0.001	-0.006	-138	-298	-734	-294	138	-1,326	120	-1,206
Mid 2011 - Mid 2016	960	0.000	0.000	0.005	0.001	0.000	0.007	0.001	0.007	58	-6	1,026	354	112	1,544	148	1,690
Mid 2016 - Mid 2021	2,360	0.002	0.001	0.000	-0.003	0.000	0.000	0.000	0.000	538	160	284	-288	48	742	122	866
Mid 2021 - Mid 2031	4,070	0.001	0.000	0.000	0.001	0.000	0.002	0.000	0.002	370	142	538	497	208	1,754	191	1,945
Mid 2021 - Mid 2041	4,085	0.001	0.000	0.000	0.001	0.000	0.001	0.000	0.002	348	143	530	483	212	1,714	194	1,908
Mid 2021 - Mid 2051	3,863	0.000	0.000	0.000	0.000	0.000	0.001	0.000	0.001	273	130	498	445	199	1,545	186	1,731

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Note: Population includes Census undercount of approximately 3.2%. Figures may not add precisely due to rounding.

Source: 2006 to 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure F-3b: Essex County, High Scenario Employment Growth Forecast by Employment Category, 2021 to 2051

Timing	Employment Land Employment	Major Office Employment	Population-Related Employment	Rural	Total
2021 - 2026	3,510	0	3,810	1,970	9,290
2021 - 2031	7,040	0	8,660	3,760	19,450
2021 - 2036	10,590	0	13,140	5,460	29,200
2021 - 2041	13,910	0	17,180	7,070	38,150
2021 - 2046	16,790	0	20,550	7,740	45,080
2021 - 2051	19,650	0	23,910	8,370	51,920

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd

Appendix G
Essex County Population, Housing and Employment Growth Allocations by Local Municipality

Population and Housing Growth Forecast by Local Municipality

Low Scenario

Figure G-1a
Essex County
Allocation of Population and Households by Area Municipality
Low Scenario, 2021 to 2051

Amherstburg

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	21,900	22,600	7,345	440	735	8,520	2.65
2021	23,500	24,300	7,925	455	805	9,185	2.65
2026	25,100	25,900	8,385	530	880	9,795	2.64
2031	26,600	27,500	8,830	635	945	10,410	2.64
2036	28,200	29,100	9,255	735	1,015	11,005	2.64
2041	29,500	30,500	9,660	845	1,085	11,590	2.63
2046	30,700	31,700	10,005	940	1,150	12,095	2.62
2051	31,800	32,800	10,340	1,040	1,225	12,605	2.60
2016-2021	1,600	1,700	580	15	70	665	
2021-2031	3,100	3,200	905	180	140	1,225	
2021-2041	6,000	6,200	1,735	390	280	2,405	
2021-2051	8,300	8,500	2,415	585	420	3,420	

Essex

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	20,400	21,100	7,270	365	455	8,090	2.61
2021	21,200	21,900	7,570	370	440	8,380	2.61
2026	22,000	22,700	7,795	400	535	8,730	2.60
2031	22,800	23,500	8,015	440	610	9,065	2.59
2036	23,600	24,400	8,220	485	690	9,395	2.60
2041	24,300	25,100	8,420	525	775	9,720	2.58
2046	24,900	25,600	8,590	565	855	10,010	2.56
2051	25,400	26,200	8,755	605	945	10,305	2.54
2016-2021	800	800	300	5	(15)	290	
2021-2031	1,600	1,600	445	70	170	685	
2021-2041	3,100	3,200	850	155	335	1,340	
2021-2051	4,200	4,300	1,185	235	505	1,925	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-1b
Essex County
Allocation of Population and Households by Area Municipality
Low Scenario, 2021 to 2051

Kingsville

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	21,600	22,200	7,050	525	400	7,975	2.78
2021	22,100	22,800	7,260	600	430	8,290	2.75
2026	23,400	24,100	7,610	715	495	8,820	2.73
2031	24,700	25,500	7,955	865	550	9,370	2.72
2036	26,100	26,900	8,275	1,020	605	9,900	2.72
2041	27,200	28,100	8,585	1,180	660	10,425	2.70
2046	28,200	29,100	8,855	1,325	720	10,900	2.67
2051	29,200	30,100	9,110	1,470	780	11,360	2.65
2016-2021	500	600	210	75	30	315	
2021-2031	2,600	2,700	695	265	120	1,080	
2021-2041	5,100	5,300	1,325	580	230	2,135	
2021-2051	7,100	7,300	1,850	870	350	3,070	

LaSalle

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	30,200	31,100	9,875	235	575	10,685	2.91
2021	32,700	33,800	10,705	240	695	11,640	2.90
2026	34,900	36,000	11,165	370	1,070	12,605	2.86
2031	37,000	38,100	11,610	550	1,380	13,540	2.81
2036	39,100	40,400	12,030	735	1,705	14,470	2.79
2041	41,100	42,400	12,430	920	2,040	15,390	2.76
2046	42,700	44,100	12,780	1,090	2,370	16,240	2.72
2051	44,400	45,800	13,110	1,260	2,720	17,090	2.68
2016-2021	2,500	2,700	830	5	120	955	
2021-2031	4,300	4,300	905	310	685	1,900	
2021-2041	8,400	8,600	1,725	680	1,345	3,750	
2021-2051	11,700	12,000	2,405	1,020	2,025	5,450	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-1c
Essex County
Allocation of Population and Households by Area Municipality
Low Scenario, 2021 to 2051

Lakeshore

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	36,600	37,800	12,595	360	220	13,175	2.87
2021	40,400	41,700	13,720	425	235	14,380	2.90
2026	42,800	44,100	14,280	595	460	15,335	2.88
2031	45,100	46,600	14,815	825	645	16,285	2.86
2036	47,600	49,100	15,325	1,060	835	17,220	2.85
2041	49,700	51,300	15,815	1,300	1,035	18,150	2.83
2046	51,500	53,100	16,235	1,520	1,230	18,985	2.80
2051	53,300	55,000	16,640	1,740	1,445	19,825	2.77
2016-2021	3,800	3,900	1,125	65	15	1,205	
2021-2031	4,700	4,900	1,095	400	410	1,905	
2021-2041	9,300	9,600	2,095	875	800	3,770	
2021-2051	12,900	13,300	2,920	1,315	1,210	5,445	

Leamington

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	27,600	28,500	7,460	1,055	1,490	10,005	2.85
2021	29,700	30,600	7,705	1,080	1,750	10,535	2.90
2026	31,700	32,700	8,075	1,395	1,865	11,335	2.88
2031	33,800	34,900	8,430	1,825	1,960	12,215	2.86
2036	36,100	37,200	8,765	2,265	2,060	13,090	2.84
2041	38,100	39,300	9,090	2,715	2,165	13,970	2.81
2046	39,800	41,100	9,370	3,125	2,265	14,760	2.78
2051	41,600	42,900	9,635	3,530	2,375	15,540	2.76
2016-2021	2,100	2,100	245	25	260	530	
2021-2031	4,100	4,300	725	745	210	1,680	
2021-2041	8,400	8,700	1,385	1,635	415	3,435	
2021-2051	11,900	12,300	1,930	2,450	625	5,005	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-1d
Essex County
Allocation of Population and Households by Area Municipality
Low Scenario, 2021 to 2051

Tecumseh

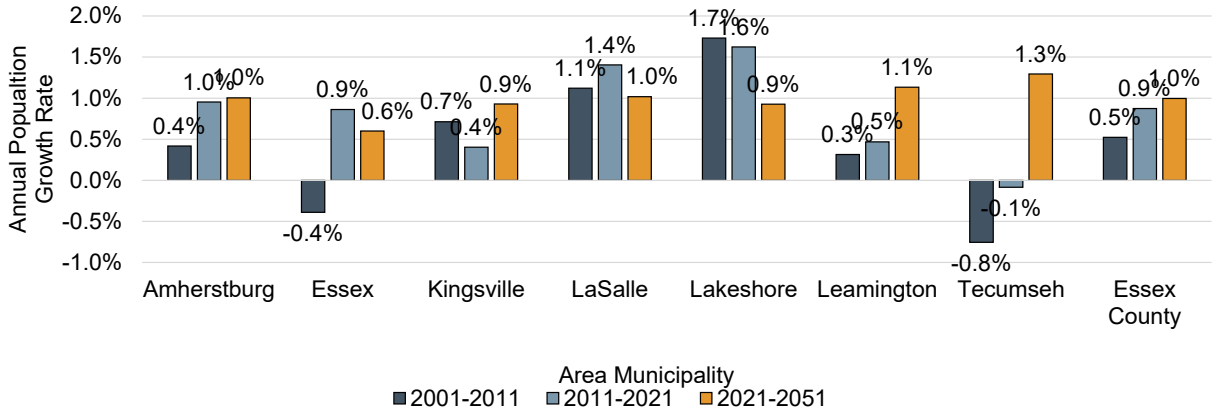
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	23,200	24,000	7,660	515	710	8,885	2.70
2021	23,300	24,000	7,745	550	650	8,945	2.68
2026	25,200	26,000	8,060	750	1,065	9,875	2.63
2031	27,100	28,000	8,365	1,020	1,415	10,800	2.59
2036	29,100	30,000	8,650	1,300	1,775	11,725	2.56
2041	31,000	32,000	8,925	1,585	2,150	12,660	2.53
2046	32,600	33,600	9,165	1,840	2,515	13,520	2.49
2051	34,200	35,300	9,390	2,100	2,910	14,400	2.45
2016-2021	100	0	85	35	(60)	60	
2021-2031	3,800	4,000	620	470	765	1,855	
2021-2041	7,700	8,000	1,180	1,035	1,500	3,715	
2021-2051	10,900	11,300	1,645	1,550	2,260	5,455	

Essex County

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	181,500	187,300	59,255	3,495	4,585	67,335	2.78
2021	193,000	199,100	62,645	3,735	5,015	71,395	2.79
2026	205,000	211,500	65,390	4,775	6,375	76,540	2.76
2031	217,200	224,100	68,030	6,175	7,515	81,720	2.74
2036	229,700	237,000	70,540	7,610	8,695	86,845	2.73
2041	241,000	248,600	72,940	9,090	9,920	91,950	2.70
2046	250,500	258,400	75,015	10,425	11,120	96,560	2.68
2051	259,900	268,100	76,990	11,760	12,405	101,155	2.65
2016-2021	11,500	11,800	3,390	240	430	4,060	
2021-2031	24,200	25,000	5,385	2,440	2,500	10,325	
2021-2041	48,000	49,500	10,295	5,355	4,905	20,555	
2021-2051	66,900	69,000	14,345	8,025	7,390	29,760	

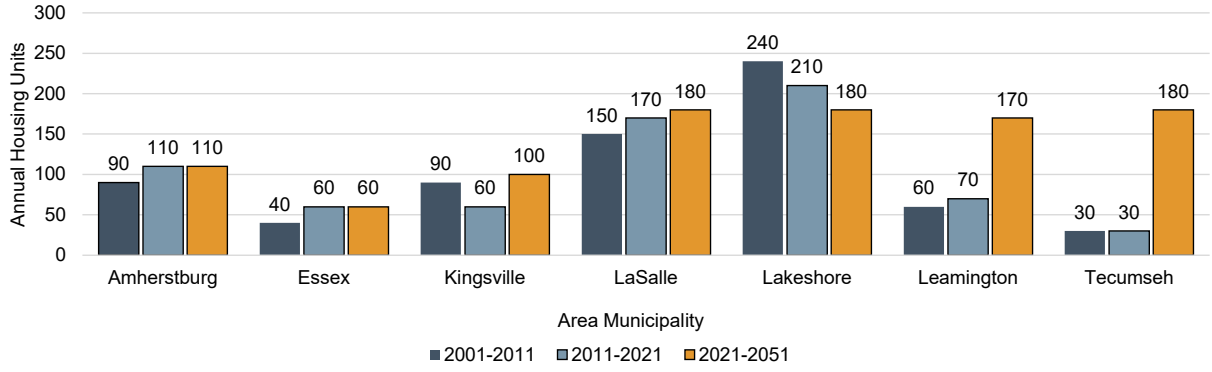
[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as "other" houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-2
Essex County
Annual Population Growth Rate by Local Municipality
2021 to 2051



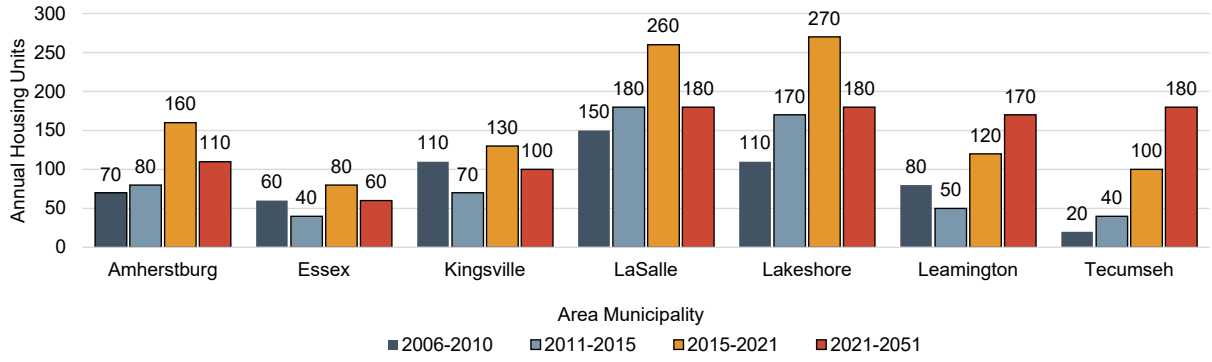
Note: Population includes the net Census undercount.
Source: Historical derived from Statistics Canada Census data, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-3
Essex County
Annual Housing Unit Growth by Area Municipality
Historical Census Housing, 2001 to 2021
Forecast Housing, 2021 to 2051



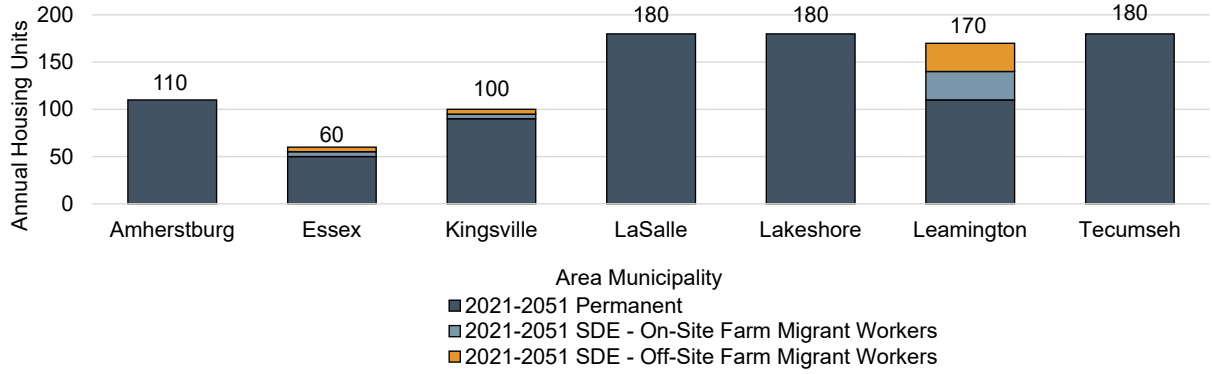
Note: Figures have been rounded.
Source: Historical derived from Statistics Canada Census data, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-4
Essex County
Annual Housing Unit Growth by Area Municipality
Historical Housing from Building Permits, 2001 to 2021
Forecast Housing, 2021 to 2051



Note: Figures have been rounded.
Source: Historical derived from Statistics Canada building permit data and building permit data provided by Essex County, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-5
Essex County
Annual Housing Unit Growth by Area Municipality and Type of Resident
Forecast Housing, 2021 to 2051



Note: Figures have been rounded.
Source: Historical derived from Statistics Canada building permit data and building permit data provided by Essex County, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Employment Growth Forecast by Local Municipality

Low Scenario

Figure G-6a
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Amherstburg

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	22,600	100	500	1,100	2,000	1,000	900	5,600	25%
2021	24,300	100	600	1,300	1,800	1,000	1,000	5,800	24%
2026	25,900	100	600	1,400	2,000	1,000	1,100	6,200	24%
2031	27,500	100	700	1,500	2,200	1,100	1,100	6,800	25%
2036	29,100	100	800	1,600	2,500	1,200	1,200	7,300	25%
2041	30,500	100	800	1,700	2,600	1,300	1,300	7,800	26%
2046	31,700	100	900	1,700	2,700	1,300	1,300	8,100	26%
2051	32,800	100	900	1,800	2,900	1,400	1,400	8,500	26%
2016 - 2021	1,600	0	100	200	-200	0	100	200	13%
2021 - 2031	3,200	0	100	200	400	200	200	1,100	34%
2021 - 2041	6,200	0	200	300	800	300	300	2,000	32%
2021 - 2051	8,500	0	300	400	1,100	400	400	2,700	32%

Essex

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	21,100	100	500	1,300	2,300	1,400	1,000	6,700	32%
2021	21,900	100	600	1,400	2,300	1,400	1,000	6,800	31%
2026	22,700	400	600	1,500	2,400	1,500	1,100	7,400	33%
2031	23,500	500	600	1,700	2,500	1,500	1,100	8,000	34%
2036	24,400	700	700	1,800	2,600	1,600	1,100	8,600	35%
2041	25,100	900	700	2,000	2,700	1,600	1,200	9,000	36%
2046	25,600	1,000	700	2,100	2,800	1,600	1,200	9,400	37%
2051	26,200	1,000	700	2,200	2,800	1,700	1,200	9,700	37%
2016 - 2021	800	0	100	100	0	0	0	200	25%
2021 - 2031	1,600	400	100	300	200	100	100	1,200	75%
2021 - 2041	3,200	800	100	600	400	200	200	2,200	69%
2021 - 2051	4,300	900	200	800	500	200	200	2,900	67%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-6b
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Kingsville

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	22,200	1,400	700	1,800	1,700	900	1,100	7,500	34%
2021	22,800	1,400	700	1,800	1,500	1,000	1,100	7,400	32%
2026	24,100	1,600	700	1,900	1,600	1,000	1,200	8,100	34%
2031	25,500	1,800	800	2,000	1,800	1,100	1,300	8,800	35%
2036	26,900	2,000	900	2,100	2,000	1,200	1,300	9,500	35%
2041	28,100	2,200	900	2,200	2,200	1,200	1,400	10,100	36%
2046	29,100	2,300	900	2,200	2,300	1,300	1,500	10,500	36%
2051	30,100	2,400	1,000	2,300	2,400	1,300	1,500	10,900	36%
2016 - 2021	600	0	0	0	-200	100	0	-100	-17%
2021 - 2031	2,700	500	100	200	400	100	100	1,400	52%
2021 - 2041	5,300	800	200	400	700	300	300	2,700	51%
2021 - 2051	7,300	1,000	300	500	900	400	400	3,500	48%

LaSalle

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	31,100	0	600	1,500	2,000	1,200	1,200	6,500	21%
2021	33,800	0	800	1,500	1,800	1,300	1,300	6,700	20%
2026	36,000	0	800	1,700	2,100	1,400	1,400	7,400	21%
2031	38,100	100	900	1,800	2,400	1,500	1,500	8,200	22%
2036	40,400	100	1,000	1,900	2,700	1,600	1,600	8,900	22%
2041	42,400	100	1,100	2,000	3,000	1,700	1,700	9,600	23%
2046	44,100	100	1,200	2,100	3,100	1,800	1,800	10,100	23%
2051	45,800	100	1,200	2,200	3,300	1,900	1,900	10,600	23%
2016 - 2021	2,600	0	200	100	-200	0	100	200	8%
2021 - 2031	4,400	0	200	200	600	200	200	1,500	34%
2021 - 2041	8,600	0	300	500	1,100	500	400	2,900	34%
2021 - 2051	12,100	0	500	600	1,500	600	600	3,900	32%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-6c
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Lakeshore

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	37,800	200	1,200	6,600	2,900	1,400	1,800	13,900	37%
2021	41,700	200	1,400	6,700	2,700	1,400	2,000	14,300	34%
2026	44,100	200	1,500	7,400	3,000	1,500	2,100	15,600	35%
2031	46,600	200	1,600	8,100	3,400	1,600	2,200	17,100	37%
2036	49,100	200	1,700	8,800	3,700	1,700	2,300	18,500	38%
2041	51,300	200	1,800	9,400	3,900	1,900	2,400	19,700	38%
2046	53,100	200	1,900	9,900	4,200	2,000	2,500	20,700	39%
2051	55,000	200	1,900	10,400	4,400	2,000	2,600	21,600	39%
2016 - 2021	3,900	0	300	100	-200	0	200	300	8%
2021 - 2031	4,900	0	200	1,400	700	300	200	2,800	57%
2021 - 2041	9,600	100	400	2,700	1,300	500	500	5,400	56%
2021 - 2051	13,300	100	500	3,800	1,700	700	700	7,400	56%

Leamington

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	28,500	1,800	800	2,900	3,700	2,100	1,300	12,500	44%
2021	30,600	4,500	900	3,100	3,200	2,100	1,400	15,200	50%
2026	32,700	5,900	1,000	3,200	3,400	2,200	1,500	17,300	53%
2031	34,900	7,300	1,100	3,400	3,800	2,400	1,600	19,500	56%
2036	37,200	8,500	1,200	3,500	4,100	2,500	1,700	21,500	58%
2041	39,300	9,700	1,200	3,700	4,300	2,600	1,800	23,400	60%
2046	41,100	10,200	1,300	3,800	4,500	2,700	1,900	24,400	59%
2051	42,900	10,700	1,400	3,900	4,700	2,800	2,000	25,400	59%
2016 - 2021	2,200	2,700	100	200	-500	0	100	2,700	123%
2021 - 2031	4,300	2,800	200	300	600	200	200	4,300	100%
2021 - 2041	8,700	5,200	300	600	1,100	500	400	8,200	94%
2021 - 2051	12,300	6,200	500	800	1,600	600	600	10,300	84%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-6d
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Tecumseh

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	24,000	100	600	8,500	3,800	1,500	1,000	15,400	64%
2021	24,000	100	600	9,300	3,600	1,600	1,000	16,200	68%
2026	26,000	100	600	9,700	3,900	1,700	1,100	17,100	66%
2031	28,000	100	700	10,100	4,200	1,800	1,200	18,000	64%
2036	30,000	100	800	10,400	4,400	1,900	1,300	19,000	63%
2041	32,000	100	900	10,700	4,700	2,000	1,400	19,800	62%
2046	33,600	100	900	11,000	4,900	2,100	1,400	20,500	61%
2051	35,300	100	1,000	11,300	5,100	2,200	1,500	21,200	60%
2016 - 2021	100	0	0	800	-100	100	0	800	800%
2021 - 2031	4,000	0	200	700	600	200	200	1,900	48%
2021 - 2041	7,900	0	300	1,400	1,000	400	400	3,600	46%
2021 - 2051	11,300	0	400	2,000	1,400	600	600	5,000	44%

Essex County

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	187,300	3,700	4,700	23,700	18,300	9,500	8,100	68,000	36%
2021	199,100	6,400	5,500	25,100	16,800	9,700	8,800	72,300	36%
2026	211,500	8,400	5,900	26,900	18,300	10,300	9,400	79,100	37%
2031	224,100	10,100	6,500	28,500	20,300	11,000	10,000	86,400	39%
2036	237,000	11,800	7,000	30,100	22,000	11,700	10,600	93,200	39%
2041	248,600	13,400	7,500	31,600	23,400	12,300	11,200	99,300	40%
2046	258,400	14,000	7,800	32,800	24,500	12,800	11,700	103,600	40%
2051	268,100	14,600	8,100	34,000	25,600	13,300	12,200	107,900	40%
2016 - 2021	11,800	2,700	800	1,400	-1,400	200	600	4,300	36%
2021 - 2031	25,000	3,700	1,000	3,400	3,500	1,300	1,200	14,100	56%
2021 - 2041	49,500	7,000	2,000	6,500	6,500	2,600	2,400	27,000	55%
2021 - 2051	69,000	8,200	2,600	9,000	8,800	3,600	3,400	35,600	52%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.

Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-7a
Essex County
Allocation of Employment By Employment Category and Local Municipality
2021 to 2051

Amherstburg

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	150	330	0	480
2021 - 2031	310	750	0	1,060
2021 - 2036	460	1,120	10	1,580
2021 - 2041	590	1,430	10	2,030
2021 - 2046	700	1,660	10	2,380
2021 - 2051	810	1,900	10	2,730

Essex

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	190	170	210	580
2021 - 2031	380	390	400	1,170
2021 - 2036	560	580	590	1,730
2021 - 2041	720	730	760	2,220
2021 - 2046	860	850	830	2,540
2021 - 2051	990	960	900	2,850

Kingsville

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	160	270	240	670
2021 - 2031	320	630	460	1,410
2021 - 2036	480	950	660	2,090
2021 - 2041	620	1,220	860	2,690
2021 - 2046	740	1,420	940	3,100
2021 - 2051	860	1,630	1,010	3,500

Notes:

- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure G-7b
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

LaSalle

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 – 2026	210	450	10	680
2021 – 2031	430	1,040	30	1,490
2021 – 2036	640	1,550	40	2,220
2021 – 2041	830	1,980	50	2,860
2021 – 2046	990	2,330	60	3,380
2021 – 2051	1,150	2,680	70	3,900

Lakeshore

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 – 2026	850	500	20	1,370
2021 – 2031	1,630	1,150	40	2,830
2021 – 2036	2,430	1,720	60	4,210
2021 – 2041	3,140	2,200	80	5,430
2021 – 2046	3,740	2,580	90	6,410
2021 – 2051	4,340	2,950	100	7,390

Leamington

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 – 2026	240	420	1,470	2,130
2021 – 2031	490	1,010	2,800	4,300
2021 – 2036	740	1,540	4,060	6,330
2021 – 2041	960	2,000	5,250	8,210
2021 – 2046	1,150	2,360	5,750	9,260
2021 – 2051	1,330	2,730	6,200	10,260

Notes:

- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure G-7c
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

Tecumseh

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 – 2026	470	400	0	880
2021 – 2031	920	940	10	1,860
2021 – 2036	1,360	1,400	10	2,770
2021 – 2041	1,770	1,820	10	3,600
2021 – 2046	2,110	2,160	10	4,290
2021 – 2051	2,450	2,510	20	4,980

Essex County

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 – 2026	2,290	2,530	1,960	6,780
2021 – 2031	4,470	5,900	3,740	14,110
2021 – 2036	6,660	8,850	5,430	20,950
2021 – 2041	8,630	11,370	7,020	27,020
2021 – 2046	10,290	13,370	7,690	31,350
2021 – 2051	11,930	15,370	8,300	35,610

Notes:
- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Population and Housing Growth Forecast by Local Municipality

Medium Scenario

Figure G-8a
Essex County
Allocation of Population and Households by Area Municipality
Medium Scenario, 2021 to 2051

Amherstburg

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	21,900	22,600	7,345	440	735	8,520	2.65
2021	23,500	24,300	7,925	455	805	9,185	2.65
2026	25,600	26,400	8,475	550	895	9,920	2.66
2031	27,600	28,500	9,005	670	970	10,645	2.68
2036	29,700	30,700	9,530	800	1,055	11,385	2.70
2041	31,700	32,700	10,040	935	1,145	12,120	2.70
2046	33,400	34,400	10,500	1,065	1,235	12,800	2.69
2051	35,000	36,100	10,940	1,195	1,330	13,465	2.68
2016-2021	1,600	1,700	580	15	70	665	
2021-2031	4,100	4,200	1,080	215	165	1,460	
2021-2041	8,200	8,400	2,115	480	340	2,935	
2021-2051	11,500	11,800	3,015	740	525	4,280	

Essex

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	20,400	21,100	7,270	365	455	8,090	2.61
2021	21,200	21,900	7,570	370	440	8,380	2.61
2026	22,400	23,100	7,840	410	550	8,800	2.63
2031	23,500	24,200	8,100	455	640	9,195	2.63
2036	24,700	25,500	8,355	510	740	9,605	2.65
2041	25,700	26,600	8,605	565	845	10,015	2.66
2046	26,600	27,500	8,830	615	955	10,400	2.64
2051	27,500	28,300	9,045	665	1,070	10,780	2.63
2016-2021	800	800	300	5	-15	290	
2021-2031	2,300	2,300	530	85	200	815	
2021-2041	4,500	4,700	1,035	195	405	1,635	
2021-2051	6,300	6,400	1,475	295	630	2,400	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-8b
Essex County
Allocation of Population and Households by Area Municipality
Medium Scenario, 2021 to 2051

Kingsville

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	21,600	22,200	7,050	525	400	7,975	2.78
2021	22,100	22,800	7,260	600	430	8,290	2.75
2026	23,800	24,600	7,680	740	505	8,925	2.76
2031	25,600	26,400	8,085	920	570	9,575	2.76
2036	27,500	28,300	8,490	1,115	640	10,245	2.76
2041	29,200	30,100	8,880	1,320	710	10,910	2.76
2046	30,600	31,600	9,230	1,510	785	11,525	2.74
2051	32,000	33,100	9,565	1,700	865	12,130	2.73
2016-2021	500	600	210	75	30	315	
2021-2031	3,500	3,600	825	320	140	1,285	
2021-2041	7,100	7,300	1,620	720	280	2,620	
2021-2051	9,900	10,300	2,305	1,100	435	3,840	

LaSalle

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	30,200	31,100	9,875	235	575	10,685	2.91
2021	32,700	33,800	10,705	240	695	11,640	2.90
2026	35,600	36,700	11,255	405	1,130	12,790	2.87
2031	38,400	39,600	11,785	620	1,505	13,910	2.85
2036	41,300	42,600	12,305	845	1,905	15,055	2.83
2041	44,100	45,500	12,815	1,085	2,330	16,230	2.80
2046	46,500	48,000	13,270	1,310	2,760	17,340	2.77
2051	48,900	50,500	13,705	1,530	3,225	18,460	2.74
2016-2021	2,500	2,700	830	5	120	955	
2021-2031	5,700	5,800	1,080	380	810	2,270	
2021-2041	11,400	11,700	2,110	845	1,635	4,590	
2021-2051	16,200	16,700	3,000	1,290	2,530	6,820	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-8c
Essex County
Allocation of Population and Households by Area Municipality
Low Scenario, 2021 to 2051

Lakeshore

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	36,600	37,800	12,595	360	220	13,175	2.87
2021	40,400	41,700	13,720	425	235	14,380	2.90
2026	43,600	45,000	14,385	640	495	15,520	2.90
2031	46,800	48,200	15,030	910	715	16,655	2.89
2036	50,100	51,700	15,660	1,200	955	17,815	2.90
2041	53,200	54,900	16,275	1,510	1,210	18,995	2.89
2046	55,800	57,600	16,835	1,795	1,465	20,095	2.87
2051	58,400	60,300	17,360	2,085	1,745	21,190	2.85
2016-2021	3,800	3,900	1,125	65	15	1,205	
2021-2031	6,400	6,500	1,310	485	480	2,275	
2021-2041	12,800	13,200	2,555	1,085	975	4,615	
2021-2051	18,000	18,600	3,640	1,660	1,510	6,810	

Leamington

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	27,600	28,500	7,460	1,055	1,490	10,005	2.85
2021	29,700	30,600	7,705	1,080	1,750	10,535	2.90
2026	32,300	33,400	8,145	1,475	1,885	11,505	2.90
2031	35,200	36,300	8,570	1,990	2,000	12,560	2.89
2036	38,200	39,400	8,985	2,530	2,125	13,640	2.89
2041	41,100	42,400	9,395	3,105	2,255	14,755	2.87
2046	43,600	44,900	9,765	3,640	2,385	15,790	2.84
2051	46,000	47,500	10,115	4,180	2,530	16,825	2.82
2016-2021	2,100	2,100	245	25	260	530	
2021-2031	5,500	5,700	865	910	250	2,025	
2021-2041	11,400	11,800	1,690	2,025	505	4,220	
2021-2051	16,300	16,900	2,410	3,100	780	6,290	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-8d
Essex County
Allocation of Population and Households by Area Municipality
Low Scenario, 2021 to 2051

Tecumseh

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	23,200	24,000	7,660	515	710	8,885	2.70
2021	23,300	24,000	7,745	550	650	8,945	2.68
2026	25,800	26,600	8,120	800	1,135	10,055	2.65
2031	28,300	29,200	8,485	1,125	1,550	11,160	2.62
2036	30,900	31,900	8,840	1,465	1,995	12,300	2.59
2041	33,500	34,600	9,190	1,830	2,470	13,490	2.56
2046	35,800	36,900	9,500	2,170	2,955	14,625	2.52
2051	38,100	39,300	9,800	2,505	3,470	15,775	2.49
2016-2021	100	0	85	35	-60	60	
2021-2031	5,000	5,200	740	575	900	2,215	
2021-2041	10,200	10,600	1,445	1,280	1,820	4,545	
2021-2051	14,800	15,300	2,055	1,955	2,820	6,830	

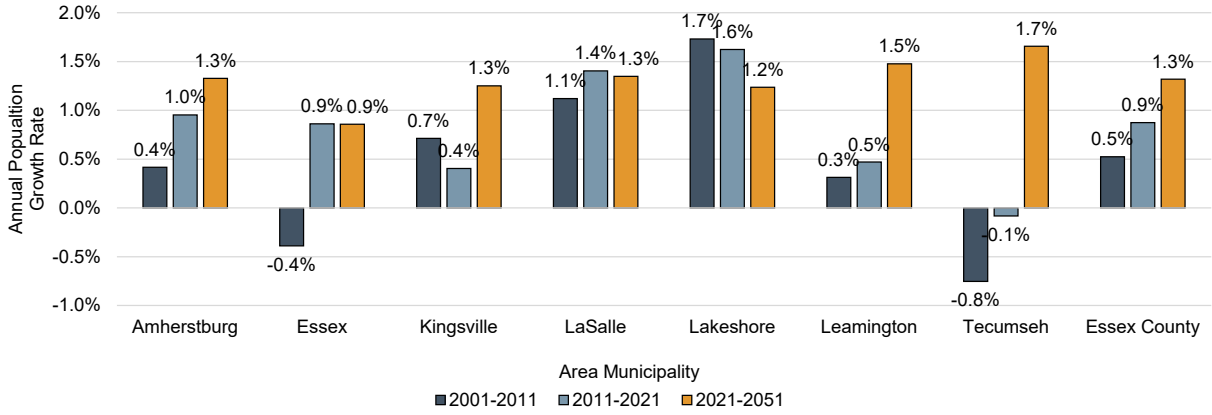
Essex County

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	181,500	187,300	59,255	3,495	4,585	67,335	2.78
2021	193,000	199,100	62,645	3,735	5,015	71,395	2.79
2026	209,000	215,600	65,910	5,035	6,600	77,545	2.78
2031	225,300	232,500	69,075	6,710	7,960	83,745	2.78
2036	242,400	250,100	72,180	8,485	9,420	90,085	2.78
2041	258,400	266,600	75,215	10,360	10,970	96,545	2.76
2046	272,300	280,900	77,945	12,115	12,545	102,605	2.74
2051	285,900	295,000	80,550	13,875	14,245	108,670	2.71
2016-2021	11,500	11,800	3,390	240	430	4,060	
2021-2031	32,300	33,400	6,430	2,975	2,945	12,350	
2021-2041	65,400	67,500	12,570	6,625	5,955	25,150	
2021-2051	92,900	95,900	17,905	10,140	9,230	37,275	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as "other" houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.

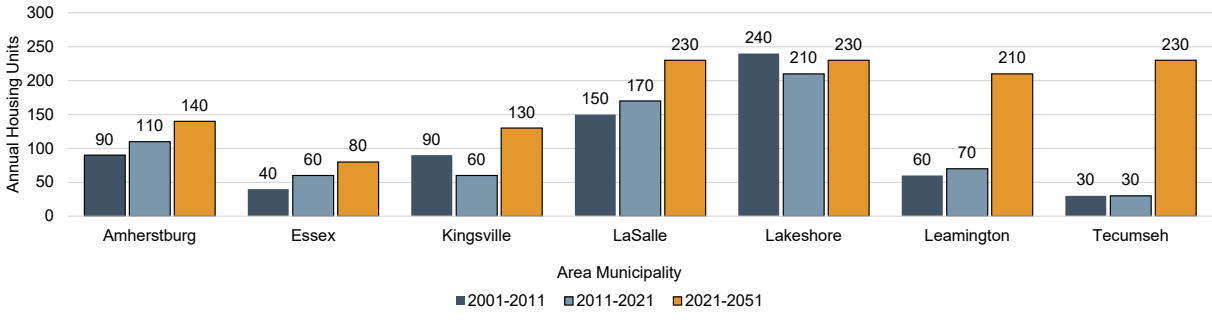
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-9
Essex County
Annual Population Growth Rate by Local Municipality
2021 to 2051



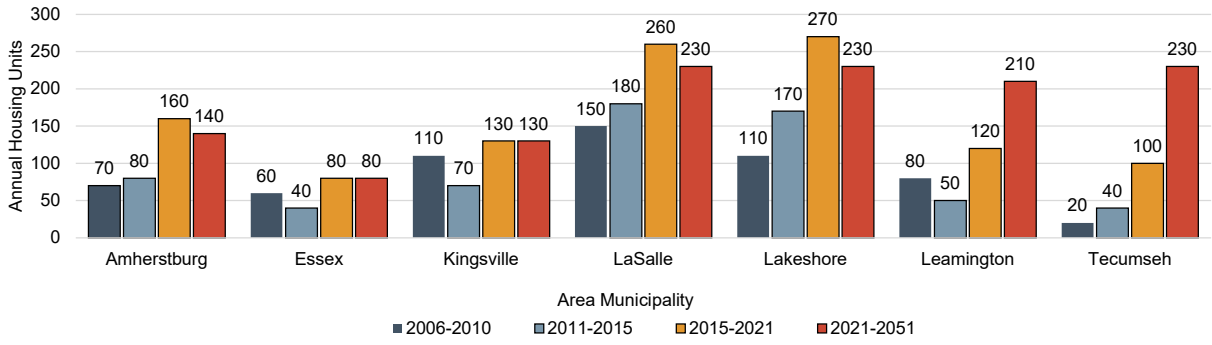
Note: Population includes the net Census undercount.
Source: Historical derived from Statistics Canada Census data, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-10
Essex County
Annual Housing Unit Growth by Area Municipality
Historical Census Housing, 2001 to 2021
Forecast Housing, 2021 to 2051



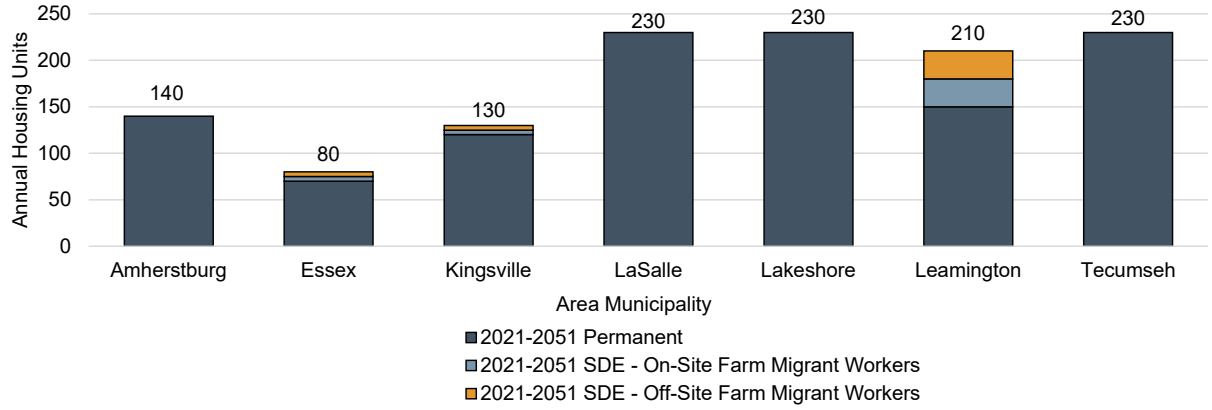
Note: Figures have been rounded.
Source: Historical derived from Statistics Canada Census data, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-11
Essex County
Annual Housing Unit Growth by Area Municipality
Historical Housing from Building Permits, 2001 to 2021
Forecast Housing, 2021 to 2051



Note: Figures have been rounded.
Source: Historical derived from Statistics Canada building permit data and building permit data provided by Essex County, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-12
Essex County
Annual Housing Unit Growth by Area Municipality and Type of Resident
Forecast Housing, 2021 to 2051



Note: Figures have been rounded.
Source: Historical derived from Statistics Canada building permit data and building permit data provided by Essex County, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Employment Growth Forecast by Local Municipality

Medium Scenario

Figure G-13a
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Amherstburg

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	22,600	100	500	1,100	2,000	1,000	900	5,600	25%
2021	24,300	100	600	1,300	1,800	1,000	1,000	5,800	24%
2026	26,400	100	600	1,400	2,000	1,100	1,100	6,400	24%
2031	28,500	100	700	1,600	2,300	1,200	1,200	7,100	25%
2036	30,700	100	800	1,700	2,600	1,300	1,300	7,800	25%
2041	32,700	100	900	1,800	2,800	1,400	1,400	8,400	26%
2046	34,400	100	900	1,900	3,000	1,500	1,500	8,900	26%
2051	36,100	100	1,000	2,000	3,200	1,600	1,600	9,400	26%
2016 - 2021	1,600	0	100	200	-200	0	100	200	13%
2021 - 2031	4,200	0	200	200	500	200	200	1,300	31%
2021 - 2041	8,400	0	300	400	1,000	400	400	2,600	31%
2021 - 2051	11,800	0	400	600	1,400	600	600	3,600	31%

Essex

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	21,100	100	500	1,300	2,300	1,400	1,000	6,700	32%
2021	21,900	100	600	1,400	2,300	1,400	1,000	6,800	31%
2026	23,100	400	600	1,600	2,400	1,500	1,100	7,500	32%
2031	24,200	500	700	1,800	2,600	1,500	1,100	8,300	34%
2036	25,500	700	700	2,000	2,700	1,600	1,200	9,000	35%
2041	26,600	900	700	2,200	2,900	1,700	1,200	9,600	36%
2046	27,500	1,000	800	2,300	3,000	1,700	1,300	10,000	36%
2051	28,300	1,000	800	2,500	3,100	1,800	1,300	10,500	37%
2016 - 2021	800	0	100	100	0	0	0	200	25%
2021 - 2031	2,300	400	100	400	300	100	100	1,400	61%
2021 - 2041	4,700	800	200	800	600	200	200	2,800	60%
2021 - 2051	6,400	900	200	1,100	800	300	300	3,600	56%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-13b
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Kingsville

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	22,200	1,400	700	1,800	1,700	900	1,100	7,500	34%
2021	22,800	1,400	700	1,800	1,500	1,000	1,100	7,400	32%
2026	24,600	1,600	800	1,900	1,600	1,000	1,200	8,200	33%
2031	26,400	1,800	800	2,000	1,900	1,100	1,300	9,100	34%
2036	28,300	2,000	900	2,200	2,200	1,200	1,400	9,900	35%
2041	30,100	2,200	1,000	2,300	2,400	1,300	1,500	10,700	36%
2046	31,600	2,300	1,000	2,400	2,500	1,400	1,600	11,200	35%
2051	33,100	2,400	1,100	2,500	2,700	1,500	1,600	11,800	36%
2016 - 2021	600	0	0	0	-200	100	0	-100	-17%
2021 - 2031	3,600	500	100	300	500	200	200	1,700	47%
2021 - 2041	7,300	800	300	500	900	400	300	3,300	45%
2021 - 2051	10,200	1,000	400	800	1,200	500	500	4,400	43%

LaSalle

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	31,100	0	600	1,500	2,000	1,200	1,200	6,500	21%
2021	33,800	0	800	1,500	1,800	1,300	1,300	6,700	20%
2026	36,700	0	900	1,700	2,100	1,400	1,400	7,600	21%
2031	39,600	100	1,000	1,800	2,600	1,600	1,600	8,600	22%
2036	42,600	100	1,100	2,000	2,900	1,700	1,700	9,500	22%
2041	45,500	100	1,200	2,200	3,300	1,900	1,800	10,400	23%
2046	48,000	100	1,300	2,300	3,500	2,000	2,000	11,100	23%
2051	50,500	100	1,300	2,400	3,800	2,100	2,100	11,900	24%
2016 - 2021	2,600	0	200	100	-200	0	100	200	8%
2021 - 2031	5,800	0	200	300	700	300	300	1,900	33%
2021 - 2041	11,700	0	400	600	1,400	600	600	3,700	32%
2021 - 2051	16,700	0	600	900	2,000	900	800	5,200	31%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-13c
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Lakeshore

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	37,800	200	1,200	6,600	2,900	1,400	1,800	13,900	37%
2021	41,700	200	1,400	6,700	2,700	1,400	2,000	14,300	34%
2026	45,000	200	1,500	7,600	3,000	1,500	2,100	16,000	36%
2031	48,200	200	1,700	8,500	3,500	1,700	2,300	17,900	37%
2036	51,700	200	1,800	9,500	3,900	1,900	2,400	19,700	38%
2041	54,900	200	1,900	10,400	4,300	2,000	2,600	21,400	39%
2046	57,600	200	2,000	11,100	4,600	2,200	2,700	22,900	40%
2051	60,300	200	2,100	11,900	4,900	2,300	2,900	24,300	40%
2016 - 2021	3,900	0	300	100	-200	0	200	300	8%
2021 - 2031	6,600	0	200	1,900	800	300	300	3,600	55%
2021 - 2041	13,200	100	500	3,700	1,600	700	600	7,200	55%
2021 - 2051	18,600	100	600	5,200	2,200	1,000	900	10,000	54%

Leamington

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	28,500	1,800	800	2,900	3,700	2,100	1,300	12,500	44%
2021	30,600	4,500	900	3,100	3,200	2,100	1,400	15,200	50%
2026	33,400	5,900	1,000	3,300	3,500	2,300	1,500	17,500	52%
2031	36,300	7,300	1,100	3,500	3,900	2,400	1,700	19,900	55%
2036	39,400	8,500	1,200	3,700	4,300	2,600	1,800	22,100	56%
2041	42,400	9,700	1,300	3,900	4,600	2,800	1,900	24,200	57%
2046	44,900	10,200	1,400	4,000	4,900	2,900	2,100	25,500	57%
2051	47,500	10,700	1,500	4,200	5,200	3,000	2,200	26,700	56%
2016 - 2021	2,200	2,700	100	200	-500	0	100	2,700	123%
2021 - 2031	5,700	2,800	200	400	700	300	300	4,700	82%
2021 - 2041	11,700	5,200	400	800	1,400	600	600	9,100	78%
2021 - 2051	16,900	6,200	600	1,100	2,000	900	800	11,600	69%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-13d
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Tecumseh

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	24,000	100	600	8,500	3,800	1,500	1,000	15,400	64%
2021	24,000	100	600	9,300	3,600	1,600	1,000	16,200	68%
2026	26,600	100	700	9,800	3,900	1,700	1,100	17,300	65%
2031	29,200	100	800	10,300	4,300	1,900	1,200	18,500	63%
2036	31,900	100	900	10,800	4,600	2,000	1,300	19,700	62%
2041	34,600	100	1,000	11,200	4,900	2,200	1,500	20,800	60%
2046	36,900	100	1,000	11,600	5,200	2,300	1,600	21,800	59%
2051	39,300	100	1,100	12,000	5,400	2,400	1,700	22,800	58%
2016 - 2021	100	0	0	800	-100	100	0	800	800%
2021 - 2031	5,200	0	200	1,000	700	300	200	2,300	44%
2021 - 2041	10,500	0	400	1,900	1,300	600	500	4,700	45%
2021 - 2051	15,300	0	500	2,700	1,800	800	700	6,600	43%

Essex County

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	187,300	3,700	4,700	23,700	18,300	9,500	8,100	68,000	36%
2021	199,100	6,400	5,500	25,100	16,800	9,700	8,800	72,300	36%
2026	215,600	8,400	6,100	27,400	18,600	10,500	9,500	80,500	37%
2031	232,500	10,100	6,700	29,500	21,100	11,400	10,300	89,200	38%
2036	250,100	11,800	7,300	31,800	23,300	12,400	11,200	97,700	39%
2041	266,600	13,400	7,900	33,900	25,100	13,300	12,000	105,500	40%
2046	280,900	14,000	8,400	35,700	26,700	14,000	12,700	111,400	40%
2051	295,000	14,600	8,800	37,500	28,300	14,700	13,400	117,200	40%
2016 - 2021	11,800	2,700	800	1,400	-1,400	200	600	4,300	36%
2021 - 2031	33,400	3,700	1,200	4,400	4,300	1,700	1,600	17,000	51%
2021 - 2041	67,500	7,000	2,400	8,800	8,300	3,500	3,200	33,300	49%
2021 - 2051	95,900	8,200	3,300	12,400	11,400	5,000	4,700	45,000	47%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.

Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-14a
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

Amherstburg

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	200	410	0	620
2021 - 2031	400	930	10	1,340
2021 - 2036	600	1,410	10	2,020
2021 - 2041	790	1,830	10	2,630
2021 - 2046	950	2,170	20	3,130
2021 - 2051	1,110	2,500	20	3,620

Essex

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	250	230	210	700
2021 - 2031	500	520	410	1,420
2021 - 2036	750	780	590	2,120
2021 - 2041	980	1,010	760	2,760
2021 - 2046	1,180	1,190	830	3,200
2021 - 2051	1,380	1,360	900	3,640

Kingsville

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	210	350	240	800
2021 - 2031	420	800	460	1,670
2021 - 2036	640	1,210	660	2,510
2021 - 2041	830	1,580	860	3,270
2021 - 2046	1,010	1,870	940	3,820
2021 - 2051	1,180	2,160	1,020	4,350

Notes:

- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast for Essex County.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure G-14b
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

LaSalle

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	280	570	20	870
2021 - 2031	550	1,290	30	1,870
2021 - 2036	840	1,940	40	2,830
2021 - 2041	1,100	2,540	60	3,700
2021 - 2046	1,330	3,030	60	4,430
2021 - 2051	1,560	3,530	70	5,160

Lakeshore

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	1,100	640	20	1,760
2021 - 2031	2,140	1,450	50	3,630
2021 - 2036	3,220	2,190	70	5,480
2021 - 2041	4,240	2,850	90	7,180
2021 - 2046	5,110	3,390	100	8,600
2021 - 2051	5,970	3,930	110	10,010

Leamington

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	320	540	1,470	2,320
2021 - 2031	640	1,250	2,800	4,690
2021 - 2036	970	1,920	4,060	6,960
2021 - 2041	1,280	2,540	5,260	9,070
2021 - 2046	1,550	3,050	5,750	10,350
2021 - 2051	1,810	3,560	6,210	11,580

Notes:

- For the purposes of this analysis Work at Home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure G-14c
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

Tecumseh

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	610	500	0	1,120
2021 - 2031	1,190	1,140	10	2,340
2021 - 2036	1,790	1,730	10	3,540
2021 - 2041	2,360	2,280	20	4,660
2021 - 2046	2,860	2,750	20	5,630
2021 - 2051	3,350	3,230	20	6,600

Essex County

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	2,970	3,240	1,970	8,180
2021 - 2031	5,840	7,370	3,750	16,960
2021 - 2036	8,810	11,190	5,450	25,450
2021 - 2041	11,580	14,620	7,050	33,250
2021 - 2046	13,990	17,450	7,720	39,160
2021 - 2051	16,360	20,260	8,340	44,970

Notes:
- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Population and Housing Growth Forecast by Local Municipality

High Scenario

Figure G-15a
Essex County
Allocation of Population and Households by Area Municipality
High Scenario, 2021 to 2051

Amherstburg

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	21,900	22,600	7,345	440	735	8,520	2.65
2021	23,500	24,300	7,925	455	805	9,185	2.65
2026	26,000	26,800	8,545	565	905	10,015	2.68
2031	28,500	29,400	9,160	705	995	10,860	2.71
2036	31,100	32,000	9,760	855	1,090	11,705	2.73
2041	33,400	34,500	10,345	1,010	1,190	12,545	2.75
2046	35,400	36,500	10,875	1,160	1,295	13,330	2.74
2051	37,400	38,500	11,390	1,310	1,405	14,105	2.73
2016-2021	1,600	1,700	580	15	70	665	
2021-2031	5,000	5,100	1,235	250	190	1,675	
2021-2041	9,900	10,200	2,420	555	385	3,360	
2021-2051	13,900	14,200	3,465	855	600	4,920	

Essex

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	20,400	21,100	7,270	365	455	8,090	2.61
2021	21,200	21,900	7,570	370	440	8,380	2.61
2026	22,600	23,300	7,875	415	560	8,850	2.63
2031	24,100	24,800	8,175	470	665	9,310	2.66
2036	25,500	26,400	8,470	530	780	9,780	2.70
2041	26,900	27,700	8,755	590	900	10,245	2.70
2046	27,900	28,800	9,015	650	1,025	10,690	2.69
2051	29,000	29,900	9,270	710	1,165	11,145	2.68
2016-2021	800	800	300	5	-15	290	
2021-2031	2,900	2,900	605	100	225	930	
2021-2041	5,700	5,800	1,185	220	460	1,865	
2021-2051	7,800	8,000	1,700	340	725	2,765	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as "other" houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-15b
Essex County
Allocation of Population and Households by Area Municipality
High Scenario, 2021 to 2051

Kingsville

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	21,600	22,200	7,050	525	400	7,975	2.78
2021	22,100	22,800	7,260	600	430	8,290	2.75
2026	24,200	25,000	7,735	765	515	9,015	2.77
2031	26,400	27,200	8,205	975	590	9,770	2.78
2036	28,600	29,500	8,665	1,195	665	10,525	2.80
2041	30,700	31,700	9,110	1,425	750	11,285	2.81
2046	32,400	33,500	9,520	1,645	840	12,005	2.79
2051	34,200	35,200	9,915	1,870	930	12,715	2.77
2016-2021	500	600	210	75	30	315	
2021-2031	4,300	4,400	945	375	160	1,480	
2021-2041	8,600	8,900	1,850	825	320	2,995	
2021-2051	12,100	12,400	2,655	1,270	500	4,425	

LaSalle

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	30,200	31,100	9,875	235	575	10,685	2.91
2021	32,700	33,800	10,705	240	695	11,640	2.90
2026	36,100	37,300	11,325	430	1,180	12,935	2.88
2031	39,600	40,800	11,935	680	1,610	14,225	2.87
2036	43,100	44,500	12,535	940	2,070	15,545	2.86
2041	46,400	47,900	13,115	1,210	2,555	16,880	2.84
2046	49,300	50,900	13,645	1,470	3,055	18,170	2.80
2051	52,200	53,900	14,160	1,735	3,605	19,500	2.76
2016-2021	2,500	2,700	830	5	120	955	
2021-2031	6,900	7,000	1,230	440	915	2,585	
2021-2041	13,700	14,100	2,410	970	1,860	5,240	
2021-2051	19,500	20,100	3,455	1,495	2,910	7,860	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-15c
Essex County
Allocation of Population and Households by Area Municipality
High Scenario, 2021 to 2051

Lakeshore

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	36,600	37,800	12,595	360	220	13,175	2.87
2021	40,400	41,700	13,720	425	235	14,380	2.90
2026	44,200	45,600	14,470	670	525	15,665	2.91
2031	48,200	49,700	15,210	990	780	16,980	2.93
2036	52,200	53,900	15,940	1,320	1,055	18,315	2.94
2041	55,900	57,700	16,645	1,670	1,345	19,660	2.93
2046	59,100	61,000	17,290	2,005	1,640	20,935	2.91
2051	62,300	64,200	17,910	2,345	1,965	22,220	2.89
2016-2021	3,800	3,900	1,125	65	15	1,205	
2021-2031	7,800	8,000	1,490	565	545	2,600	
2021-2041	15,500	16,000	2,925	1,245	1,110	5,280	
2021-2051	21,900	22,500	4,190	1,920	1,730	7,840	

Leamington

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	27,600	28,500	7,460	1,055	1,490	10,005	2.85
2021	29,700	30,600	7,705	1,080	1,750	10,535	2.90
2026	32,900	33,900	8,200	1,540	1,900	11,640	2.91
2031	36,400	37,500	8,690	2,130	2,030	12,850	2.92
2036	40,000	41,200	9,170	2,755	2,175	14,100	2.92
2041	43,400	44,700	9,635	3,410	2,325	15,370	2.91
2046	46,400	47,800	10,065	4,035	2,480	16,580	2.88
2051	49,300	50,900	10,475	4,665	2,645	17,785	2.86
2016-2021	2,100	2,100	245	25	260	530	
2021-2031	6,700	6,900	985	1,050	280	2,315	
2021-2041	13,700	14,100	1,930	2,330	575	4,835	
2021-2051	19,600	20,300	2,770	3,585	895	7,250	

[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as "other" houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-15d
Essex County
Allocation of Population and Households by Area Municipality
High Scenario, 2021 to 2051

Tecumseh

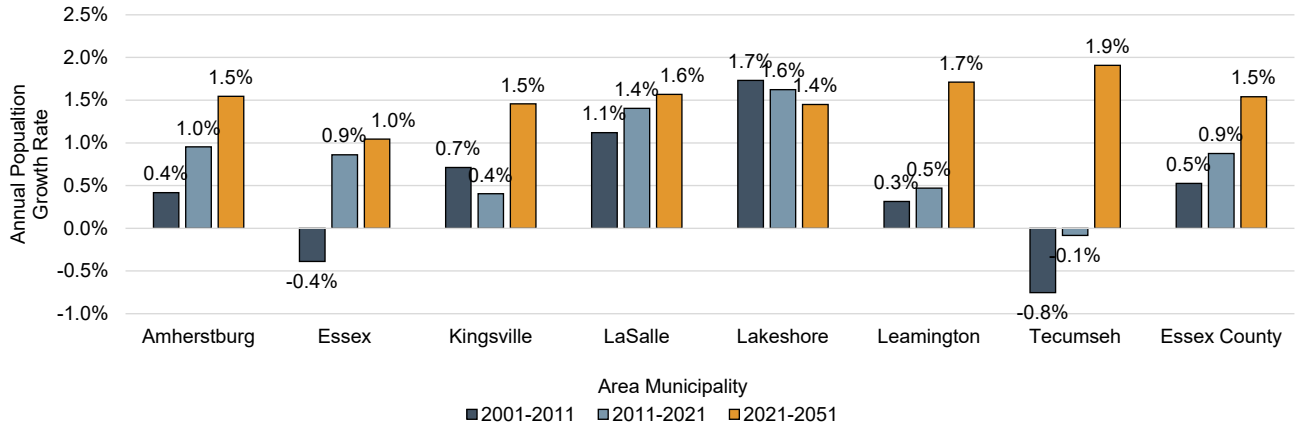
Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	23,200	24,000	7,660	515	710	8,885	2.70
2021	23,300	24,000	7,745	550	650	8,945	2.68
2026	26,300	27,100	8,170	840	1,190	10,200	2.66
2031	29,300	30,200	8,585	1,215	1,670	11,470	2.63
2036	32,500	33,500	8,995	1,610	2,180	12,785	2.62
2041	35,500	36,600	9,395	2,020	2,725	14,140	2.59
2046	38,200	39,400	9,760	2,415	3,285	15,460	2.55
2051	41,000	42,300	10,110	2,815	3,890	16,815	2.52
2016-2021	100	0	85	35	-60	60	
2021-2031	6,000	6,200	840	665	1,020	2,525	
2021-2041	12,200	12,600	1,650	1,470	2,075	5,195	
2021-2051	17,700	18,300	2,365	2,265	3,240	7,870	

Essex County

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount)[1]	Low Density Households[2]	Medium Density Households[3]	High Density Households[4]	Total Households	Persons Per Unit (P.P.U.) (Including Census Undercount)
2016	181,500	187,300	59,255	3,495	4,585	67,335	2.78
2021	193,000	199,100	62,645	3,735	5,015	71,395	2.79
2026	212,200	219,000	66,330	5,245	6,775	78,350	2.80
2031	232,400	239,800	69,980	7,175	8,350	85,505	2.80
2036	253,000	261,000	73,545	9,215	10,025	92,785	2.81
2041	272,200	280,800	77,015	11,355	11,795	100,165	2.80
2046	288,800	298,000	80,185	13,400	13,630	107,215	2.78
2051	305,300	315,000	83,245	15,460	15,620	114,325	2.76
2016-2021	11,500	11,800	3,390	240	430	4,060	
2021-2031	39,400	40,700	7,335	3,440	3,335	14,110	
2021-2041	79,200	81,700	14,370	7,620	6,780	28,770	
2021-2051	112,300	115,900	20,600	11,725	10,605	42,930	

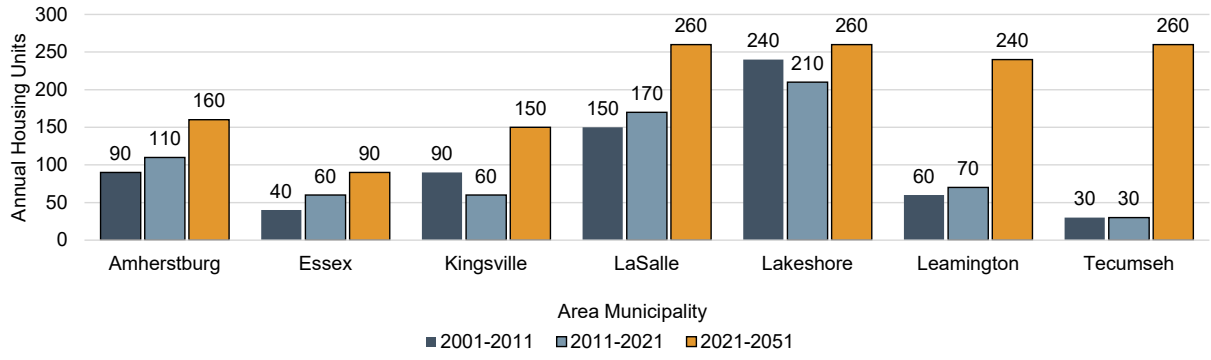
[1] Population includes undercount of approximately 3.2%.
[2] Includes single and semi-detached houses as well as “other” houses as per Statistics Canada.
[3] Includes all townhouses and apartments in duplexes.
[4] Includes all apartments with less than or greater than five storeys.
Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-16
Essex County
Annual Population Growth Rate by Local Municipality
2021 to 2051



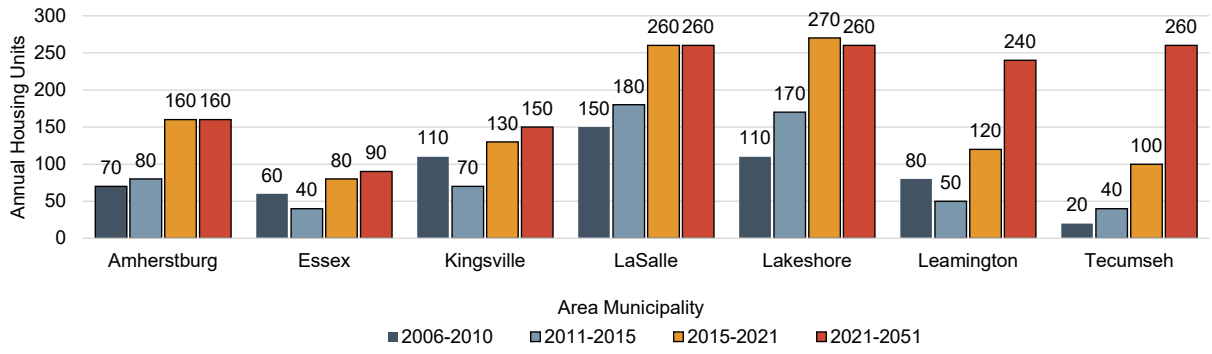
Note: Population includes the net Census undercount.
Source: Historical derived from Statistics Canada Census data, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-17
Essex County
Annual Housing Unit Growth by Area Municipality
Historical Census Housing, 2001 to 2021
Forecast Housing, 2021 to 2051



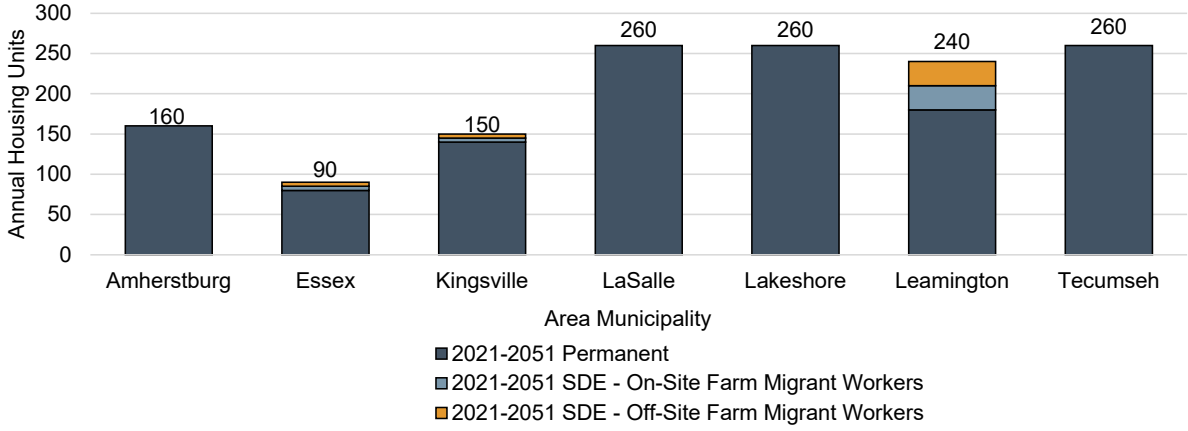
Note: Figures have been rounded.
Source: Historical derived from Statistics Canada Census data, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-18
Essex County
Annual Housing Unit Growth by Area Municipality
Historical Housing from Building Permits, 2001 to 2021
Forecast Housing, 2021 to 2051



Note: Figures have been rounded.
Source: Historical derived from Statistics Canada building permit data and building permit data provided by Essex County, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-19
Essex County
Annual Housing Unit Growth by Area Municipality and Type of Resident
Forecast Housing, 2021 to 2051



Note: Figures have been rounded.
Source: Historical derived from Statistics Canada building permit data and building permit data provided by Essex County, 2001 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Employment Growth Forecast by Local Municipality

High Scenario

Figure G-20a
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Amherstburg

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	22,600	100	500	1,100	2,000	1,000	900	5,600	25%
2021	24,300	100	600	1,300	1,800	1,000	1,000	5,800	24%
2026	26,800	100	700	1,500	2,100	1,100	1,100	6,500	24%
2031	29,400	100	700	1,600	2,400	1,200	1,200	7,300	25%
2036	32,000	100	800	1,700	2,700	1,400	1,300	8,100	25%
2041	34,500	100	900	1,900	3,000	1,500	1,500	8,900	26%
2046	36,500	100	1,000	2,000	3,200	1,600	1,600	9,500	26%
2051	38,500	100	1,100	2,100	3,400	1,700	1,700	10,000	26%
2016 - 2021	1,600	0	100	200	-200	0	100	200	13%
2021 - 2031	5,100	0	200	300	600	300	200	1,600	31%
2021 - 2041	10,200	0	400	500	1,200	500	500	3,100	30%
2021 - 2051	14,300	0	500	700	1,600	700	700	4,300	30%

Essex

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	21,100	100	500	1,300	2,300	1,400	1,000	6,700	32%
2021	21,900	100	600	1,400	2,300	1,400	1,000	6,800	31%
2026	23,300	400	600	1,600	2,400	1,500	1,100	7,600	33%
2031	24,800	500	700	1,900	2,600	1,600	1,200	8,500	34%
2036	26,400	700	700	2,100	2,800	1,700	1,200	9,300	35%
2041	27,700	900	800	2,300	3,000	1,700	1,300	10,000	36%
2046	28,800	1,000	800	2,500	3,100	1,800	1,400	10,500	36%
2051	29,900	1,000	800	2,700	3,200	1,800	1,400	11,100	37%
2016 - 2021	800	0	100	100	0	0	0	200	25%
2021 - 2031	2,900	400	100	500	400	200	100	1,600	55%
2021 - 2041	5,800	800	200	1,000	700	300	300	3,200	55%
2021 - 2051	8,000	900	300	1,300	900	400	400	4,200	53%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-20b
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Kingsville

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	22,200	1,400	700	1,800	1,700	900	1,100	7,500	34%
2021	22,800	1,400	700	1,800	1,500	1,000	1,100	7,400	32%
2026	25,000	1,600	800	1,900	1,700	1,100	1,200	8,300	33%
2031	27,200	1,800	900	2,100	2,000	1,200	1,400	9,300	34%
2036	29,500	2,000	900	2,300	2,300	1,300	1,500	10,300	35%
2041	31,700	2,200	1,000	2,400	2,500	1,400	1,600	11,100	35%
2046	33,500	2,300	1,100	2,500	2,700	1,500	1,700	11,800	35%
2051	35,200	2,400	1,100	2,700	2,900	1,600	1,700	12,400	35%
2016 - 2021	600	0	0	0	-200	100	0	-100	-17%
2021 - 2031	4,400	500	200	300	500	200	200	1,900	43%
2021 - 2041	8,800	800	300	600	1,000	500	400	3,700	42%
2021 - 2051	12,400	1,000	400	900	1,400	600	600	5,000	40%

LaSalle

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	31,100	0	600	1,500	2,000	1,200	1,200	6,500	21%
2021	33,800	0	800	1,500	1,800	1,300	1,300	6,700	20%
2026	37,300	0	900	1,700	2,200	1,400	1,400	7,700	21%
2031	40,800	100	1,000	1,900	2,700	1,600	1,600	8,900	22%
2036	44,500	100	1,100	2,100	3,100	1,800	1,800	10,000	22%
2041	47,900	100	1,200	2,300	3,500	2,000	2,000	11,100	23%
2046	50,900	100	1,300	2,400	3,800	2,200	2,100	11,900	23%
2051	53,900	100	1,400	2,600	4,100	2,300	2,300	12,800	24%
2016 - 2021	2,600	0	200	100	-200	0	100	200	8%
2021 - 2031	7,100	0	200	400	900	400	300	2,200	31%
2021 - 2041	14,200	0	500	700	1,700	700	700	4,400	31%
2021 - 2051	20,100	0	700	1,000	2,300	1,000	1,000	6,100	30%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-20c
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Lakeshore

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	37,800	200	1,200	6,600	2,900	1,400	1,800	13,900	37%
2021	41,700	200	1,400	6,700	2,700	1,400	2,000	14,300	34%
2026	45,600	200	1,600	7,800	3,100	1,500	2,100	16,300	36%
2031	49,700	200	1,700	8,900	3,700	1,800	2,300	18,600	37%
2036	53,900	200	1,800	10,100	4,100	2,000	2,500	20,800	39%
2041	57,700	200	2,000	11,100	4,600	2,200	2,700	22,800	40%
2046	61,000	200	2,100	12,000	4,900	2,400	2,900	24,500	40%
2051	64,200	200	2,200	12,900	5,300	2,500	3,000	26,200	41%
2016 - 2021	3,900	0	300	100	-200	0	200	300	8%
2021 - 2031	8,000	0	300	2,300	1,000	400	400	4,300	54%
2021 - 2041	16,000	100	600	4,400	1,900	800	800	8,600	54%
2021 - 2051	22,500	100	800	6,300	2,600	1,200	1,100	12,000	53%

Leamington

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	28,500	1,800	800	2,900	3,700	2,100	1,300	12,500	44%
2021	30,600	4,500	900	3,100	3,200	2,100	1,400	15,200	50%
2026	33,900	5,900	1,000	3,300	3,500	2,300	1,500	17,600	52%
2031	37,500	7,300	1,100	3,600	4,000	2,500	1,700	20,200	54%
2036	41,200	8,500	1,300	3,800	4,500	2,700	1,900	22,600	55%
2041	44,700	9,700	1,400	4,000	4,900	2,900	2,100	24,900	56%
2046	47,800	10,200	1,500	4,200	5,200	3,000	2,200	26,300	55%
2051	50,900	10,700	1,600	4,400	5,500	3,200	2,400	27,700	54%
2016 - 2021	2,200	2,700	100	200	-500	0	100	2,700	123%
2021 - 2031	6,900	2,800	200	500	800	400	300	5,000	72%
2021 - 2041	14,100	5,200	500	1,000	1,700	700	700	9,800	70%
2021 - 2051	20,300	6,200	700	1,300	2,300	1,000	1,000	12,600	62%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-20d
Essex County
Allocation of Employment By Major Sector and Local Municipality
2021 to 2051

Tecumseh

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	24,000	100	600	8,500	3,800	1,500	1,000	15,400	64%
2021	24,000	100	600	9,300	3,600	1,600	1,000	16,200	68%
2026	27,100	100	700	9,900	3,900	1,700	1,100	17,500	65%
2031	30,200	100	800	10,500	4,400	1,900	1,300	19,000	63%
2036	33,500	100	900	11,100	4,800	2,100	1,400	20,400	61%
2041	36,600	100	1,000	11,600	5,100	2,300	1,600	21,700	59%
2046	39,400	100	1,100	12,100	5,400	2,400	1,700	22,800	58%
2051	42,300	100	1,200	12,600	5,700	2,500	1,900	24,000	57%
2016 - 2021	100	0	0	800	-100	100	0	800	800%
2021 - 2031	6,200	0	200	1,200	800	300	300	2,800	45%
2021 - 2041	12,600	0	400	2,300	1,500	700	600	5,500	44%
2021 - 2051	18,300	0	600	3,300	2,100	900	900	7,800	43%

Essex County

Year	Population with Undercount	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. [1]	Total	Activity Rate
2016	187,300	3,700	4,700	23,700	18,300	9,500	8,100	68,000	36%
2021	199,100	6,400	5,500	25,100	16,800	9,700	8,800	72,300	36%
2026	219,000	8,400	6,200	27,800	18,900	10,600	9,700	81,600	37%
2031	239,800	10,100	6,900	30,500	21,800	11,800	10,700	91,700	38%
2036	261,000	11,800	7,700	33,100	24,300	12,900	11,700	101,500	39%
2041	280,800	13,400	8,300	35,700	26,500	13,900	12,600	110,400	39%
2046	298,000	14,000	8,900	37,800	28,300	14,800	13,500	117,400	39%
2051	315,000	14,600	9,400	40,000	30,200	15,700	14,300	124,200	39%
2016 - 2021	11,800	2,700	800	1,400	-1,400	200	600	4,300	36%
2021 - 2031	40,700	3,700	1,400	5,400	5,000	2,100	1,900	19,500	48%
2021 - 2041	81,700	7,000	2,800	10,600	9,700	4,200	3,900	38,200	47%
2021 - 2051	115,900	8,200	3,900	14,900	13,400	6,000	5,600	51,900	45%

[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
Note: Population includes undercount of approximately 3.2%. Figures may not add precisely due to rounding.
Source: 2016 derived from Statistics Canada Census data. Forecast by Watson & Associates Economists Ltd.

Figure G-21a
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

Amherstburg

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	230	480	0	720
2021 - 2031	480	1,090	10	1,580
2021 - 2036	720	1,650	10	2,380
2021 - 2041	940	2,140	10	3,100
2021 - 2046	1,140	2,550	20	3,700
2021 - 2051	1,330	2,940	20	4,290

Essex

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	300	280	210	790
2021 - 2031	600	630	410	1,640
2021 - 2036	910	950	590	2,450
2021 - 2041	1,190	1,220	760	3,180
2021 - 2046	1,430	1,440	840	3,710
2021 - 2051	1,670	1,650	900	4,220

Kingsville

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	250	410	240	900
2021 - 2031	510	940	460	1,900
2021 - 2036	760	1,430	670	2,850
2021 - 2041	1,000	1,860	860	3,720
2021 - 2046	1,210	2,210	940	4,360
2021 - 2051	1,410	2,560	1,020	4,990

Notes:

- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure G-21b
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

LaSalle

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	330	670	20	1,010
2021 - 2031	660	1,510	30	2,200
2021 - 2036	1,000	2,280	50	3,330
2021 - 2041	1,320	2,980	60	4,350
2021 - 2046	1,590	3,560	70	5,220
2021 - 2051	1,860	4,150	80	6,100

Lakeshore

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	1,300	750	20	2,080
2021 - 2031	2,590	1,710	50	4,340
2021 - 2036	3,890	2,580	70	6,540
2021 - 2041	5,100	3,370	90	8,550
2021 - 2046	6,150	4,010	100	10,260
2021 - 2051	7,190	4,650	110	11,950

Leamington

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	370	630	1,470	2,470
2021 - 2031	770	1,470	2,800	5,030
2021 - 2036	1,160	2,250	4,070	7,480
2021 - 2041	1,530	2,970	5,260	9,760
2021 - 2046	1,850	3,580	5,750	11,180
2021 - 2051	2,170	4,180	6,210	12,560

Notes:

- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure G-21c
Essex County
Allocation of Employment by Employment Category and Local Municipality
2021 to 2051

Tecumseh

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	720	580	0	1,310
2021 - 2031	1,430	1,320	10	2,760
2021 - 2036	2,160	2,010	10	4,170
2021 - 2041	2,830	2,640	20	5,490
2021 - 2046	3,430	3,200	20	6,650
2021 - 2051	4,020	3,770	30	7,810

Essex County

Period	Employment Land Employment	Population-Related Employment	Rural Employment	Total Employment
2021 - 2026	3,510	3,810	1,970	9,290
2021 - 2031	7,040	8,660	3,760	19,450
2021 - 2036	10,590	13,140	5,460	29,200
2021 - 2041	13,910	17,180	7,070	38,150
2021 - 2046	16,790	20,550	7,740	45,080
2021 - 2051	19,650	23,910	8,370	51,920

Notes:
- For the purposes of this analysis, work at home employment is solely captured in the Population-Related Employment category.
- For the purposes of this analysis Employment Land Employment includes employment on urban and rural employment lands.
- There is no Major Office Employment forecast.
- Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Essex County Scenario Comparison by Local Municipality, 2021 to 2051

High Scenario

Figure G-22
Essex County
Low, Medium and High Scenarios
Population Summary by Area Municipality, 2021 to 2051

	Area Municipality							Essex County
	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	
2006	22,600	20,800	21,700	28,700	34,500	29,900	25,200	183,500
2011	22,100	20,100	21,900	29,400	35,500	29,200	24,200	182,500
2016	22,600	21,100	22,200	31,100	37,800	28,500	24,000	187,300
2021	24,300	21,900	22,800	33,800	41,700	30,600	24,000	199,100
Low Scenario, 2051	32,800	26,200	30,100	45,800	55,000	42,900	35,300	268,100
Medium Scenario, 2051	36,100	28,300	33,100	50,500	60,300	47,500	39,300	295,000
High Scenario, 2051	38,500	29,900	35,200	53,900	64,200	50,900	42,300	315,000
Annual Population Growth								
2006-2011	-100	-140	40	140	200	-140	-200	-200
2011-2016	100	200	60	340	460	-140	-40	960
2016-2021	340	160	120	540	780	420	0	2,360
Low Scenario, 2021-2051	280	140	240	400	440	410	380	2,300
Medium Scenario, 2021-2051	390	210	340	560	620	560	510	3,200
High Scenario, 2021-2051	470	270	410	670	750	680	610	3,860
Incremental Population Growth Shares								
2006-2011	50%	70%	-20%	-70%	-100%	70%	100%	100%
2011-2016	10%	21%	6%	35%	48%	-15%	-4%	100%
2016-2021	14%	7%	5%	23%	33%	18%	0%	100%
Low Scenario, 2021-2051	12%	6%	10%	17%	19%	18%	17%	100%
Medium Scenario, 2021-2051	12%	7%	11%	18%	19%	18%	16%	100%
High Scenario, 2021-2051	12%	7%	11%	17%	19%	18%	16%	100%
Annual Population Growth Rate								
2006-2011	-0.4%	-0.7%	0.2%	0.5%	0.6%	-0.5%	-0.8%	-0.1%
2011-2016	0.4%	1.0%	0.3%	1.1%	1.3%	-0.5%	-0.2%	0.5%
2016-2021	1.5%	0.7%	0.5%	1.7%	2.0%	1.4%	0.0%	1.2%
Low Scenario, 2021-2051	1.0%	0.6%	0.9%	1.0%	0.9%	1.1%	1.3%	1.0%
Medium Scenario, 2021-2051	1.3%	0.9%	1.3%	1.3%	1.2%	1.5%	1.7%	1.3%
High Scenario, 2021-2051	1.5%	1.0%	1.5%	1.6%	1.4%	1.7%	1.9%	1.5%

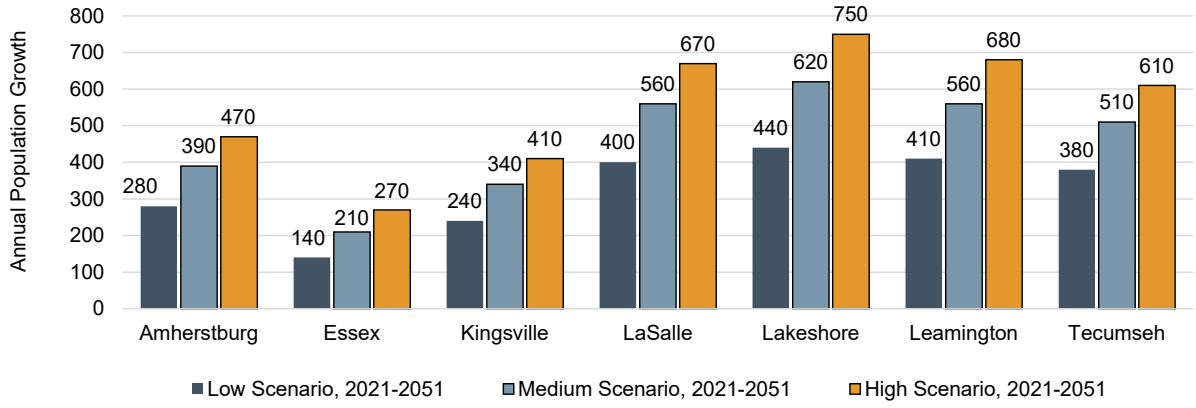
Note: Population includes the net Census undercount. Figures may not add precisely due to rounding.
Source: Historical derived from Statistics Canada Census data, 2006 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-23
Essex County
Low, Medium and High Scenarios
Population Summary by Area Municipality, 2021 to 2051

Total Population Growth	Area Municipality							Essex County
	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	
Total Population								
2021	24,300	21,900	22,800	33,800	41,700	30,600	24,000	199,100
Low Scenario, 2051	32,800	26,200	30,100	45,800	55,000	42,900	35,300	268,100
Medium Scenario, 2051	36,100	28,300	33,100	50,500	60,300	47,500	39,300	295,000
High Scenario, 2051	38,500	29,900	35,200	53,900	64,200	50,900	42,300	315,000
Total Incremental Population Growth, 2021 to 2051								
Low Scenario, 2021-2051	8,500	4,300	7,300	12,000	13,300	12,300	11,300	69,000
Medium Scenario, 2021-2051	11,800	6,400	10,300	16,700	18,600	16,900	15,300	95,900
High Scenario, 2021-2051	14,200	8,000	12,400	20,100	22,500	20,300	18,300	115,900

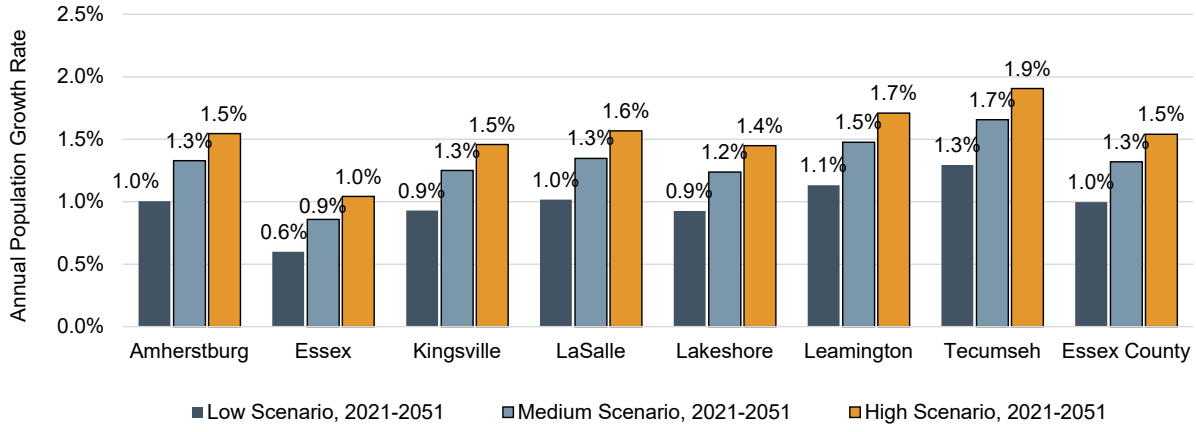
Note: Population includes the net Census undercount. Figures may not add precisely due to rounding.
Source: Historical derived from Statistics Canada Census data, 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-24
Essex County
Low, Medium and High Scenarios
Annual Population Growth by Area Municipality, 2021 to 2051



Note: Figures may not add precisely due to rounding. Population includes net Census undercount.
Source: Watson & Associates Economists Ltd.

Figure G-25
Essex County
Low, Medium and High Scenarios
Annual Population Growth Rate by Area Municipality, 2021 to 2051



Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-26
Essex County
Low, Medium and High Scenarios
Housing Summary by Area Municipality, 2021 to 2051

	Area Municipality							Essex County
	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	
2006	7,930	7,640	7,460	9,330	11,630	9,820	8,500	62,300
2011	8,120	7,790	7,710	9,900	12,330	9,860	8,660	64,380
2016	8,520	8,080	7,970	10,690	13,190	10,000	8,880	67,330
2021	9,190	8,390	8,290	11,640	14,390	10,550	8,950	71,390
Low Scenario, 2051	12,610	10,310	11,350	17,100	19,830	15,550	14,400	101,160
Medium Scenario, 2051	13,470	10,790	12,130	18,470	21,200	16,830	15,780	108,670
High Scenario, 2051	14,120	11,150	12,710	19,500	22,230	17,800	16,820	114,330
Annual Housing Growth								
2006-2011	40	30	50	110	140	10	30	420
2011-2016	80	60	50	160	170	30	40	590
2016-2021	130	60	60	190	240	110	10	810
Low Scenario, 2021-2051	110	60	100	180	180	170	180	990
Medium Scenario, 2021-2051	140	80	130	230	230	210	230	1,240
High Scenario, 2021-2051	160	90	150	260	260	240	260	1,430
Incremental Housing Growth Shares								
2006-2011	10%	7%	12%	26%	33%	2%	7%	100%
2011-2016	14%	10%	8%	27%	29%	5%	7%	100%
2016-2021	16%	7%	7%	23%	30%	14%	1%	100%
Low Scenario, 2021-2051	11%	6%	10%	18%	18%	17%	18%	100%
Medium Scenario, 2021-2051	11%	6%	10%	19%	19%	17%	19%	100%
High Scenario, 2021-2051	11%	6%	10%	18%	18%	17%	18%	100%
Annual Housing Growth Rate								
2006-2011	0.5%	0.4%	0.7%	1.2%	1.2%	0.1%	0.4%	0.7%
2011-2016	1.0%	0.7%	0.7%	1.5%	1.4%	0.3%	0.5%	0.9%
2016-2021	1.5%	0.8%	0.8%	1.7%	1.8%	1.1%	0.2%	1.2%
Low Scenario, 2021-2051	1.1%	0.7%	1.1%	1.3%	1.1%	1.3%	1.6%	1.2%
Medium Scenario, 2021-2051	1.3%	0.8%	1.3%	1.6%	1.3%	1.6%	1.9%	1.4%
High Scenario, 2021-2051	1.4%	1.0%	1.4%	1.7%	1.5%	1.8%	2.1%	1.6%

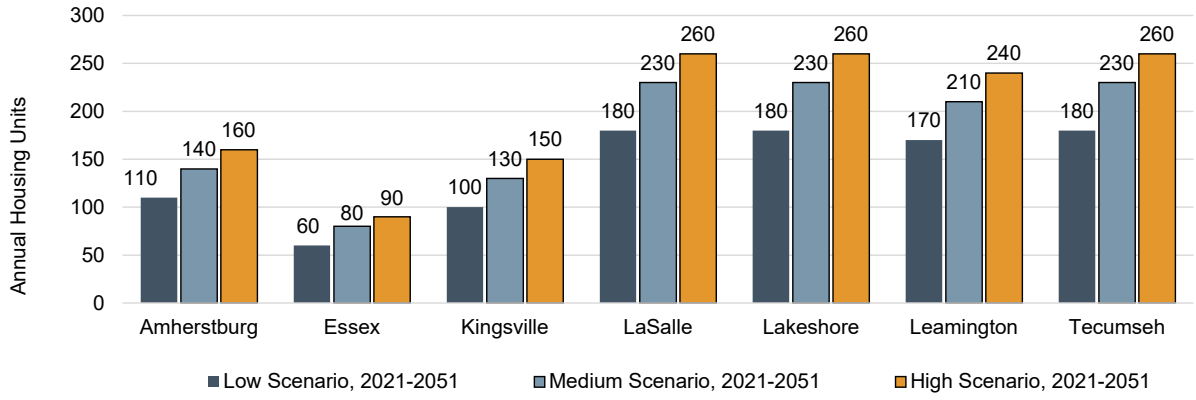
Note: Population includes the net Census undercount. Figures may not add precisely due to rounding.
Source: Historical derived from Statistics Canada Census data, 2006 to 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-27
Essex County
Low, Medium and High Scenarios
Total Housing Growth Summary by Area Municipality, 2021 to 2051

	Area Municipality							Essex County
	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	
Total Housing								
2021	9,190	8,390	8,290	11,640	14,390	10,550	8,950	71,390
Low Scenario, 2051	12,610	10,310	11,350	17,100	19,830	15,550	14,400	101,160
Medium Scenario, 2051	13,470	10,790	12,130	18,470	21,200	16,830	15,780	108,670
High Scenario, 2051	14,120	11,150	12,710	19,500	22,230	17,800	16,820	114,330
Total Incremental Housing Growth, 2021 to 2051								
Low Scenario, 2021-2051	3,420	1,920	3,060	5,460	5,440	5,000	5,450	29,770
Medium Scenario, 2021-2051	4,280	2,400	3,840	6,830	6,810	6,280	6,830	37,280
High Scenario, 2021-2051	4,930	2,760	4,420	7,860	7,840	7,250	7,870	42,940

Note: Figures may not add precisely due to rounding.
Source : Historical derived from Statistics Canada Census data, 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-28
Essex County
Low, Medium and High Scenarios
Annual Housing Unit Growth Summary by Area Municipality, 2021 to 2051



Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-29
Essex County
Low, Medium and High Scenarios
Employment Summary by Area Municipality, 2021 to 2051

Employment Growth	Area Municipality							Essex County
	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	
2006	5,300	7,000	7,400	5,700	12,100	13,700	14,400	65,400
2011	5,600	6,600	6,600	5,700	11,100	12,500	11,400	59,400
2016	5,600	6,700	7,500	6,500	13,900	12,500	15,400	68,000
2021	5,800	6,800	7,400	6,700	14,300	15,200	16,200	72,300
Low Scenario, 2051	8,500	9,700	10,900	10,600	21,600	25,400	21,200	107,900
Medium Scenario, 2051	9,400	10,500	11,800	11,900	24,300	26,700	22,800	117,200
High Scenario, 2051	10,000	11,100	12,400	12,800	26,200	27,700	24,000	124,200
Annual Employment Growth								
2006-2011	60	-80	-160	0	-200	-240	-600	-1,200
2011-2016	0	20	180	160	560	0	800	1,720
2016-2021	40	20	-20	40	80	540	160	860
Low Scenario, 2021-2051	90	100	120	130	240	340	170	1,190
Medium Scenario, 2021-2051	120	120	150	170	330	380	220	1,500
High Scenario, 2021-2051	140	140	170	200	400	420	260	1,730
Incremental Employment Growth Shares								
2006-2011	-5%	7%	13%	0%	17%	20%	50%	100%
2011-2016	0%	1%	10%	9%	33%	0%	47%	100%
2016-2021	5%	2%	-2%	5%	9%	63%	19%	100%
Low Scenario, 2021-2051	8%	8%	10%	11%	20%	29%	14%	100%
Medium Scenario, 2021-2051	8%	8%	10%	11%	22%	25%	15%	100%
High Scenario, 2021-2051	8%	8%	10%	12%	23%	24%	15%	100%
Annual Employment Growth Rate								
2006-2011	1.1%	-1.2%	-2.3%	0.0%	-1.7%	-1.8%	-4.6%	-1.9%
2011-2016	0.0%	0.3%	2.6%	2.7%	4.6%	0.0%	6.2%	2.7%
2016-2021	0.7%	0.3%	-0.3%	0.6%	0.6%	4.0%	1.0%	1.2%
Low Scenario, 2021-2051	1.3%	1.2%	1.3%	1.5%	1.4%	1.7%	0.9%	1.3%
Medium Scenario, 2021-2051	1.6%	1.5%	1.6%	1.9%	1.8%	1.9%	1.1%	1.6%
High Scenario, 2021-2051	1.8%	1.6%	1.7%	2.2%	2.0%	2.0%	1.3%	1.8%

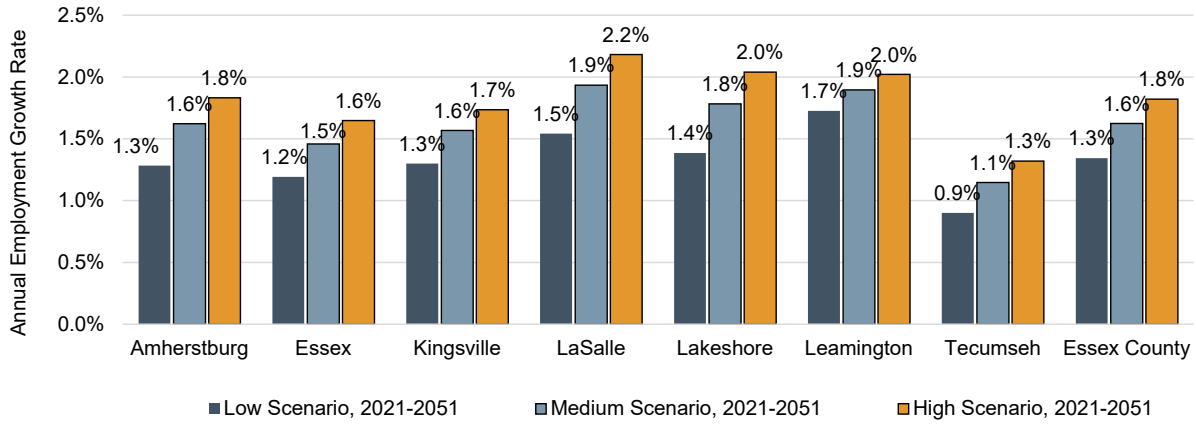
Note: Figures may not add precisely due to rounding. Total employment includes N.F.P.O.W. and work at home jobs.
Source: Historical derived from Statistics Canada Census data, 2006 to 2016, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Figure G-30
Essex County
Low, Medium and High Scenarios
Total Employment Growth Summary by Area Municipality, 2021 to 2051

	Area Municipality							Essex County
	Amherstburg	Essex	Kingsville	LaSalle	Lakeshore	Leamington	Tecumseh	
2021	5,800	6,800	7,400	6,700	14,300	15,200	16,200	72,300
Low Scenario, 2051	8,500	9,700	10,900	10,600	21,600	25,400	21,200	107,900
Medium Scenario, 2051	9,400	10,500	11,800	11,900	24,300	26,700	22,800	117,200
High Scenario, 2051	10,000	11,100	12,400	12,800	26,200	27,700	24,000	124,200
Total Employment Growth Percentage Change from 2021 to 2051 [(2051-2021)/2021]								
Low Scenario, 2021-2051	47%	43%	47%	58%	51%	67%	31%	49%
Medium Scenario, 2021-2051	62%	54%	59%	78%	70%	76%	41%	62%
High Scenario, 2021-2051	72%	63%	68%	91%	83%	82%	48%	72%

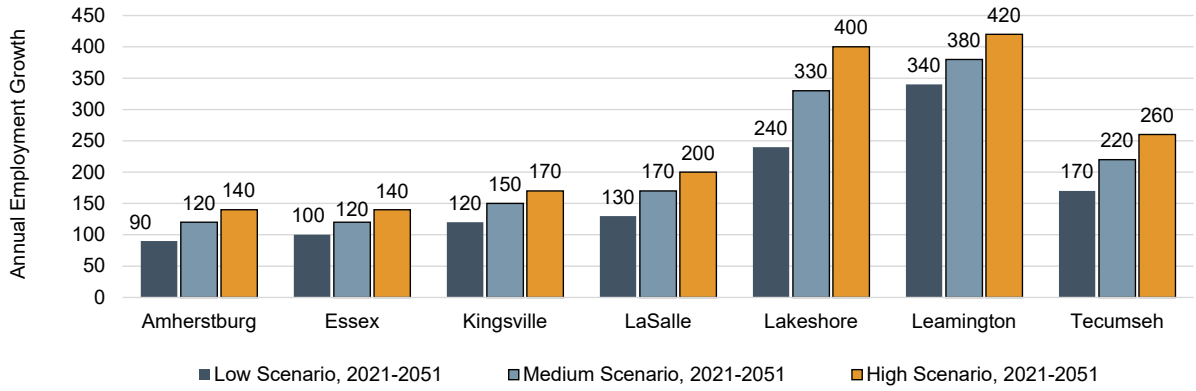
Note: Figures may not add precisely due to rounding. Total employment includes N.F.P.O.W. and work at home jobs.
Source: Watson & Associates Economists Ltd.

Figure G-31
Essex County
Low, Medium and High Scenarios
Annual Employment Growth Rates by Area Municipality, 2021 to 2051



Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure G-32
Essex County
Low, Medium and High Scenarios
Total Annual Employment Growth by Area Municipality, 2021 to 2051



Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.