



Growth Analysis Update

Middlesex County

Final Report

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
COVID-19	Coronavirus disease
E.R.	Economic Region
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.T.H.A.	Greater Toronto and Hamilton Area
M.O.F.	Ministry of Finance
N.P.R.	Non-permanent Residents
O.P.	Official Plan
P.M.I.	Purchasing Managers' Index
P.P.S., 2020	Provincial Policy Statement, 2020
P.P.S., 2024	Provincial Planning Statement, 2024
P.P.U.	Persons per unit
U.S.	United States



Executive Summary

Watson & Associates Economists Ltd. (Watson) was retained by Middlesex County to provide an updated long-term assessment of the County's population, housing, and employment growth potential to the year 2056. This analysis will form a key background document for the County's Official Plan Review (O.P.R.) regarding long-term planning, growth management, infrastructure needs, financial planning, and other key decision-making matters at the County-wide and Area Municipal level.

This study provides a comprehensive assessment of Middlesex County's long-term population, housing, and employment growth within the context of regional economic conditions, forecast growth drivers and disruptors, as well as County-wide and local development trends. The key findings of the Middlesex County Growth Analysis are summarized below.

1. The Long-Term Population and Economic Growth Outlook for Middlesex County is Very Positive

As discussed in Chapters 3 and 4, herein, Middlesex County is well positioned to continue to attract and accommodate steady population and employment growth over the next three decades. A key driver of this long-term population and employment growth potential is the County's geographic proximity to the City of London combined with its strategic location (to varying degrees) to the Highway 401 and 402 corridors.

The population in Middlesex County showed considerable growth between 2016 and 2024, primarily driven by outward growth pressures from the City of London and the larger urban centres of the Greater Golden Horseshoe (G.G.H.). The rate of new housing development across Middlesex County has notably picked up since 2015 and was further accelerated across Southwestern Ontario with the onset of the coronavirus disease (COVID-19) pandemic in March 2020. This acceleration in housing (which peaked between 2020 and 2021) was led by increased opportunities for remote/hybrid work, combined with growing employment growth opportunities within the London Economic Region (E.R.) and the surrounding commuter-shed. While the latest Fall 2024 population projections from the Ministry of Finance (M.O.F.) show a slight decrease in the population projections for Southwestern Ontario compared to the



Summer 2023 projections, the London-Middlesex Area^[1] (i.e., Census Division) projections continue to exhibit strong population growth.

Middlesex 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 with proximity to employment as well as other urban amenities. These amenities include public and private schools, post-secondary institutions, regional hospitals, access to urban indoor and outdoor municipal recreational facilities, and proximity to recreational opportunities throughout the County's rural countryside.

Over the next 35 years, Middlesex County is forecast to grow at an annual rate of 1.8%, which is considerably higher than what has been experienced over the past two decades. The County is expected to add approximately 69,800 people over the next 35 years, or a little under 2,000 new residents per year.

2. While the County's Population is Steadily Growing, it is also Getting Older

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 the aging local population. In 2001, the seniors' population (i.e., 65 years and older) in Middlesex County represented approximately 12% of the total population base. By 2021, the County's 65+ population share had grown significantly to 19%, which is comparable to the province as a whole (19%). By 2031, the share of population aged 65+ is forecast to peak at 22% of the County population base and remain close to this the level for the remainder of the long-term forecast period. These anticipated demographic trends within the County will be largely driven by the aging of the existing Baby Boom population, and to a lesser extent, succeeding generations (i.e., Generation X and Millennials), as opposed to net migration of new seniors.

This aging trend places increasing demands on net migration as a source for population growth in the County, due to declining (and eventually negative) population growth from

^[1] Middlesex County Census Division includes the City of London, Township of Adelaide-Metcalf, Township of Lucan Biddulph, Village of Newbury, Municipality of Middlesex Centre, Municipality of North Middlesex, Municipality of Southwest Middlesex, Municipality of Strathroy-Caradoc, Municipality of Thames Centre, Chippewas of the Thames First Nation 42, Munsee-Delaware Nation 1, and Oneida 41.



natural increase, i.e., births less deaths. The aging of the County's population is also anticipated to generate increasing needs for seniors' housing and other housing options to accommodate a growing share of older residents. Furthermore, an older population base can also place downward pressure on the labour force participation rate^[2], which can potentially constrain long-term economic growth within the local and regional economy.

Over the long-term forecast period, approximately 90% of the new residents that are expected to arrive in the County are projected to be adults between the ages of 20 and 54 as well as children (i.e., under 19 years of age). These forecast net migration trends for Middlesex County are expected to significantly mitigate the impacts of the County's aging population base.

3. A Broad Range of Housing Types are Anticipated to Accommodate Continued Permanent Population Growth Across the County

To accommodate the recommended long-term permanent population growth scenario, the County will require the construction of approximately 28,700 new housing units over the 2021 to 2056 planning horizon. This represents an average of approximately 820 new housings units annually.

A fundamental planning policy objective at the provincial, County, and local level is to plan for complete communities, which includes but is not limited to offering a broad range of housing options as well a diverse mix of local employment opportunities. This is important because it is recognized that the County has a role to play in attracting, growing, and retaining local businesses by providing housing options to a growing regional labour force base.

Accordingly, there will continue to be a growing need to attract and accommodate new and existing residents within the County across all ages at all income groups, including young adults, new families, growing families with children, empty nesters and seniors. To achieve this objective, Middlesex County, working with its Area Municipalities and stakeholders will need to continue to supply available land that can accommodate a broad range of ownership and rental housing products across all housing types, including, but not limited to, grade-related ownership housing (i.e., single detached,

^[2] Defined by Statistics Canada as the proportion of the population aged 15 and older who are employed or looking for work.



townhouses), condominium apartments, purpose-built rental housing, seniors' housing and secondary units). Resident attraction efforts must be linked to not only housing accommodation but also infrastructure, community services, urban amenities, and quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson) was retained by Middlesex County to provide an updated long-term assessment of the County's population, housing, and employment growth potential to the year 2056. This analysis will form a key background document for the County's Official Plan Review (O.P.R.) regarding long-term planning, growth management, infrastructure needs, financial planning, and other key decision-making matters at the County-wide and Area Municipal level.

1.2 Study Purpose

Middlesex County is initiating a Growth Analysis Review update as part of its O.P.R. This study represents a foundational document which directs near-, medium-, and long-term population, housing, and employment trends for the County and its Area Municipalities over the next 30 years and beyond. For the purposes of this study, the year 2056 will represent the long-term planning horizon for growth.

Since the completion of the County's previous Growth Projections Study, prepared in 2020 ^[3], the following key factors have collectively contributed to the need for the long-term growth forecast to be updated:

- The Statistics Canada 2021 population and housing Census results are tracking higher in most areas of Southwestern Ontario, including Middlesex County, when compared to 2021 estimates as per current Official Plan (O.P.) growth forecasts. Stronger population and housing demand has been primarily driven by outward growth pressure from the City of London and the larger urban centres within the Greater Golden Horseshoe (G.G.H.) between 2016 and 2024.
- The rate of new housing development across Middlesex County has notably picked up since 2015 and was further accelerated across Southwestern Ontario with the onset of the coronavirus disease (COVID-19) pandemic in March 2020. This acceleration in housing (which peaked between 2020 and 2021) was led by increased opportunities for remote/hybrid work, combined with growing

^[3] Middlesex County Housing Growth Forecast and Allocation by Local Municipality, December 11, 2020, Watson & Associates Economists Ltd.



employment growth opportunities within the London Economic Region (E.R.) and the surrounding commuter-shed. Added to this, the County's price-competitive housing market, relative to larger urban centres particularly within Central Ontario, has increased this area's attractiveness to young adults, families, empty nesters, and seniors. With stronger housing demand across the County and the broader London E.R., there has been a considerably greater urban development interest from the development community across Middlesex County.

- As further noted in Chapter 2, changes in provincial legislation have introduced new requirements for conducting growth projections. The Provincial Planning Statement (P.P.S.), 2024 notes that "planning authorities shall base population and employment growth forecasts on Ministry of Finance (M.O.F.) 25-year projections and may modify projections, as appropriate."^[4]
- Lastly, the updated M.O.F. population projections (Fall 2024) continue to exhibit a stronger long-term population growth outlook for Southwestern Ontario, including London-Middlesex Area (i.e., Census Division), in response to the key points mentioned above.^[5]

In accordance with the above, there is a need to re-examine the County's near-term and longer-term population, housing, and employment growth outlook within the context of both broader provincial and regional growth trends, and local growth drivers across the County. Of particular interest for the County is a better understanding regarding the pace of urban development within its Area Municipalities, considering local real-estate market demand and the medium- to long-term growth outlook for the County as a whole.

^[4] Provincial Planning Statement, 2024, policy 2.1.1, page 6.

^[5] Middlesex County Census Division includes the City of London, Township of Adelaide-Metcalf, Township of Lucan Biddulph, Village of Newbury, Municipality of Middlesex Centre, Municipality of North Middlesex, Municipality of Southwest Middlesex, Municipality of Strathroy-Caradoc, Municipality of Thames Centre, Chippewas of the Thames First Nation 42, Munsee-Delaware Nation 1, and Oneida 41.



2. Provincial Policy Context

On August 20, 2024, the province released a new P.P.S., which came into effect on October 20, 2024.^[6] The P.P.S., 2024 was released in coordination with Bill 185, *Cutting Red Tape to Build More Homes Act*, for a 30-day comment period. The following summarizes key highlights of the P.P.S., 2024 that are particularly relevant to this study.

Planning for Growth

- Compared to the P.P.S., 2020, the P.P.S., 2024 provides a more flexible time horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Policy 2.1.3 states, “Planning for infrastructure, public service facilities, strategic growth areas and Employment Areas may extend beyond this time horizon.”^[7] As such, this suggests that municipalities are to designate land to accommodate growth for at least 20 years, but not more than 30 years, with the opportunity to designate additional land beyond the 30-year time horizon when planning for Employment Areas, strategic growth areas, and infrastructure.^[8]
- Policy 2.1.1 of the P.P.S., 2024 notes that “planning authorities shall base population and employment growth forecasts on Ontario Population Projections published by the M.O.F. and may modify, as appropriate.” It is important to note that the M.O.F. population forecasts are provided at the Census Division (C.D.) level only, which typically represents upper-tier municipalities, including separated municipalities and large urban single-tier municipalities. The M.O.F. does not provide forecasts at the area-municipal level (i.e., Census Subdivisions). As previously noted, the C.D for the London-Middlesex Area includes the City of London and Middlesex County.
- The most recent Fall 2024 M.O.F. forecast provides growth estimates to the year 2051. As previously mentioned, the P.P.S., 2024 states that urban land needs can be calculated up to 30 years, with a longer time period permitted for Employment Areas. This may require municipalities, in certain cases, to prepare growth forecasts that extend beyond the M.O.F. horizon of 2051. It is further

^[6] <https://ero.ontario.ca/notice/019-8462>.

^[7] Provincial Planning Statement, 2024, policy 2.1.3, p. 6.

^[8] Ibid.



noted that the M.O.F. forecasts are not meant to replace long-term forecasting by municipalities, but rather to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations, a practice that Watson currently carries out.

Planning for Housing

- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated and available for residential development. Planning authorities are also required to maintain at all times, where new development is to occur, lands with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans.
- Lastly, the P.P.S., 2024 requires municipalities to establish and maintain minimum targets for intensification and redevelopment within built-up areas (B.U.A.), based on local conditions.^[9]

Settlement Area Boundary Expansions

- According to the P.P.S., 2024, a Settlement Area boundary expansion (S.A.B.E.) is allowed at any time and without the requirement of a Municipal Comprehensive Review (M.C.R.) or Comprehensive Review (C.R.), provided that the S.A.B.E. meets the criteria established in policy 2.3.2.1. The criteria include establishing the need to designate and plan for additional land to meet an appropriate range and mix of land uses, supported by infrastructure and public facilities, while limiting the impact on agricultural areas. Overall, the policies allow for a simplified and flexible approach for municipalities to undertake an S.A.B.E.^[10]

Planning for Employment

- Unchanged from the P.P.S., 2020, major office and major institutional development should be directed to Major Transit Station Areas (M.T.S.A.s) or

^[9] Provincial Planning Statement, 2024, policy 2.3.1.4, p. 8.

^[10] Provincial Planning Statement, 2024, policy 2.3.2, p. 9.



other strategic growth areas where frequent transit service is available, according to the P.P.S., 2024.^[11]

- The P.P.S., 2024 includes an updated definition of Employment Area based on the amendment of the *Planning Act* on June 8, 2023. The *Planning Act* was amended under subsection 1 (1) to include a new, more narrowly scoped definition of “area of employment.” This definition of Employment Area has been revised to include only industrial-type employment as a primary use. The amendment to the *Planning Act* received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the *Planning Act* came into effect on October 20, 2024, in concert with the P.P.S., 2024.
- According to the P.P.S., 2024, municipalities are to assess and update Employment Areas identified in O.P.s to ensure that this designation is appropriate to the planned function of Employment Areas.^[12]
- The P.P.S., 2024 requires that municipalities designate, protect, and plan for all Employment Areas in Settlement Areas by:
 - planning for the long-term needs of Employment Area uses;
 - prohibiting residential uses, commercial uses, public service facilities, other institutional uses, and retail and office uses not associated with the primary employment use; and
 - providing an appropriate transition to adjacent non-Employment Areas to ensure land use compatibility and economic viability.^[13]
- Under the P.P.S., 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Previously, under the P.P.S., 2020 and the Growth Plan, municipalities were required to review changes to designated Employment Areas during a M.C.R. or C.R. Under the P.P.S., 2024, municipalities are required to demonstrate that there is an identified need for the removal and that the land is not required for Employment Area uses over the long term. Furthermore, municipalities need to demonstrate that the proposed change from Employment Area to a non-Employment Area use does not undermine the overall viability of the Employment Area.^[14]

^[11] Provincial Planning Statement, policy 2.8.1.4, p. 13.

^[12] Ibid., policy 2.8.2.4, p. 14.

^[13] Ibid., policy 2.8.2.3, p. 14.

^[14] Ibid., policy 2.8.2.5, p. 15.



- The P.P.S., 2024 requires that all development within 300 metres of Employment Areas shall avoid, or mitigate, potential impacts on the “long-term economic viability” of employment uses.^[15] This means that when planning for Employment Areas or other uses in proximity to Employment Areas, municipalities must ensure there is an appropriate transition between Employment Areas and sensitive uses like residential uses where necessary. This acknowledges that the delineation of the Employment Area does not necessarily protect uses on the edge of the Employment Area which may require separation from sensitive uses.
- While the P.P.S., 2024 requires an appropriate separation between Employment Area uses and sensitive uses, it also provides the opportunity for manufacturing, small-scale warehousing, and other industrial uses to be accommodated outside of Employment Areas where there are no adverse effects to being located near a sensitive use. It notes that, if there is an opportunity, these uses are to be encouraged in strategic growth areas and other mixed-use areas where frequent transit service is available.^[16]

Planning for Growth in Rural Areas

- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 indicates that rural Settlement Areas shall be the focus of growth and development and their vitality and regeneration shall be promoted.^[17] Furthermore, when directing development in rural Settlement Areas, municipalities are to consider locally appropriate rural characteristics, the scale of the development, and the provision of appropriate service levels.^[18]
- In prime agricultural areas, permitted uses and activities include agricultural uses, agriculture-related uses, and on-farm diversified uses based on provincial guidance, according to the P.P.S., 2024.^[19] Compared to the P.P.S., 2020, this policy has been modified in the P.P.S., 2024 to include provincial guidance.

^[15] Provincial Planning Statement, policy 2.8.1.3, p. 13.

^[16] Ibid., policy 2.8.1.2, p. 13.

^[17] Ibid., policy 2.5.2, p. 11.

^[18] Ibid., policy 2.5.3, p. 11.

^[19] Ibid., policy 4.3.2, p. 23.



A cohort survival forecast methodology has been utilized to generate the population and housing forecast for Middlesex County (see Appendix A for further details). The P.P.S., 2024 does not require adherence to standard guidelines regarding growth projection and urban land needs. In place of specific guidelines, the P.P.S., 2024 indicates that the long-term need for urban lands will be informed by “provincial guidance.” Notwithstanding these changes to the P.P.S., 2024, long-range demographic and economic growth forecasts and urban land needs assessments remain a fundamental background component to the O.P.R. process.



3. Overview of Macro-Economic and Regional Trends

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

3.1 Navigating Increased Uncertainty in a Changing Global Economy

After several years of resilient global economic growth following the 2020 and 2021 lockdowns during the COVID-19 pandemic, the global economy is now facing a mounting number of near-term economic challenges and geo-political conflicts. These global economic challenges largely relate to unresolved conflicts associated with the ongoing war between Ukraine and Russia; the Israel / Gaza conflict; rising global trade tensions, particularly with the United States (U.S.); increasing government, corporate and consumer debt; and ongoing concerns regarding persistent inflation.

Collectively, these factors have resulted in heightened global economic uncertainty and volatility, which has raised the likelihood of an economic recession in the U.S. and Canada in 2025. In its latest report, the Organization for Economic Co-operation (OECD) is predicting a softening in their global economic forecast for 2025 and 2026. For Canada, gross domestic product (G.D.P.) is forecast to decline from 1.5% in 2024 to 0.7% in 2025 and 2026, a notable reduction from 2.0% in the December 2024 Economic Outlook.^[20]

For manufacturing-focused regions such as Southern Ontario, goods-producing sectors—especially the automotive industry—are being impacted by global disruptions while also undergoing a shift toward advanced technologies focused on electric vehicle production. While not a new trend, globalization and technological advancements continue to shift the economic composition of developed economies from goods-production toward a service-based economy. Since the onset of the pandemic, this economic shift has increasingly raised fundamental concerns in certain cases regarding national security, economic trade balances and prosperity, which has further prompted

^[20] OECD Economic Outlook, Interim Report, Steering through Uncertainty, March 2025.



counties to adopt protectionist measures when setting out their near- and longer-term national economic strategies.

These ongoing structural changes and technological disruptions shaping the global economy, combined with rising geo-political and trade tension, will require that both senior and local governments become increasingly agile and responsive to evolving industry demands and disruptive economic forces, a trend that has been expedited by the COVID-19 pandemic. These revised near-term economic forecasts and on-going disruptions are anticipated to influence the near-term population and employment growth outlook for Canada, Ontario, and Middlesex County over the coming years.

3.2 Evolving Macro-Economic Trends Following COVID-19

Since the outbreak of coronavirus disease (COVID-19) was declared a pandemic on March 12, 2020, its economic effects have been substantial. Employment sectors, including travel, tourism, hospitality, manufacturing, and energy were hit relatively hard by social distancing measures. In contrast, knowledge-based sectors adapted well to remote and hybrid work, often thriving. Changes in social behaviour, including physical distancing, and increased remote work have led to ongoing economic disruptions, particularly in how work is done. Additionally, rising trade tensions and geopolitical unrest continue to highlight vulnerabilities in globalization and supply chains, which were severely disrupted during the peak of the pandemic.

Following a sharp national economic recovery in 2020 due to COVID-19 policy measures, federal economic support, fiscal stimulus, and vaccine rollouts, the Canadian economy experienced significant economic growth in 2021 and 2022. Despite this recovery, growing macro-economic headwinds, market volatility, increased uncertainty, and reduced confidence are placing downward pressure on the near-term economic growth outlook at the national, provincial, and regional level.

Persistently high global and national inflation levels following COVID-19 required an aggressive response by central banks, leading to sharp increases in interest rates and quantitative tightening measures.^[21] By mid 2024 both the Bank of Canada and the U.S. Federal Reserve began reducing interest rates in response to declining inflation

^[21] Quantitative tightening is a process whereby a central bank reduces the supply of money circulating in the economy by selling financial assets, mainly government bonds.



rates and slowing economic growth. The Bank of Canada has now cut its overnight lending rate multiple times since 2024, reducing the policy rate to 2.75% as of March 2025. Similarly, the U.S. Federal Reserve has also implemented interest rate cuts to support economic growth. As of February 2025, Canada's inflation rate was at 2.6%, a notable increase from 1.9% during the previous month but down from its peak of 8.1% in June 2022.^[22]

While most recent trends in inflation and interest rates are more favourable to Canadian residents, businesses, and investors (relative to the previous two years), their effects often lag and vary considerably at the regional level. Furthermore, despite these more favourable conditions regarding inflation and interest rates, wage and earnings growth have not kept with the pace of rising costs for goods and services over the past several years, with housing and food costs representing key stressors for most Canadian families. It is also important to recognize that ongoing geopolitical conflicts and U.S. protectionist policies (i.e. tariffs) will likely limit the effectiveness of the Bank of Canada monetary policy in controlling inflationary pressures even under conditions of slowing global and national economic growth.

As of 2025, rising public sector and household debt in Canada remains a key economic concern, largely due to pandemic response measures, alongside increasing household debt levels, largely driven by significant housing price appreciation in Canada's major urban centres. Since peaking in February 2022, the national housing market has shown signs of cooling, with notable declines in both sales and price growth in recent years driven by higher mortgage rates relative to pandemic conditions. It is noted, however, that trends vary widely by region, and housing affordability (both ownership and rental) has been steadily eroded for the past decade across most Canadian economic regions. As such, recent trends towards lower interest rates are likely to have a limited impact on improving housing affordability, unless lower borrowing fees are met with a sustained decline in average housing prices and rents.

While these immediate concerns highlight potential setbacks to the country's economic recovery, the longer-term outlook for Canada's economy and housing market remains positive. Continued investments in infrastructure and technology, along with a resilient and growing labour market, will be required to drive national economic growth and competitiveness. Strong leadership and coordination across all levels of government

^[22] Consumer Price Index February 2025, March 28, 2025, Statistics Canada



will be needed to navigate these complexities carefully in the coming months and years ahead.

3.3 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, virtual meetings, cloud technology, artificial intelligence, 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 2016, it was estimated that approximately 5.8% of the Middlesex County workforce was working from home on a full-time basis. This estimate increased slightly to 5.9% in 2021, excluding hybrid workers, who are captured as residents with a usual place of work. From a municipal planning and urban development perspective, it is important to consider the impact of hybrid workers when assessing non-residential space needs, particularly in the office sector.

In addition to work at home employment, there are workers within Middlesex County who have no fixed place of work (N.F.P.O.W.).^[23] The percentage of workers within the County who reported as N.F.P.O.W. was approximately 4.2% in 2016 and about 5.0% in 2021.^[24] 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 remain relatively high across Middlesex County over the long term, driven by continued growth in knowledge-based employment sectors and technological advancement.

^[23] 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.”

^[24] Work at home and N.F.P.O.W. employment derived from 2016 and 2021 Statistics Canada Census data. It is noted that the 2021 Census data may not be reliable due to timing of enumeration coinciding with COVID-19.



3.4 Provincial Economic Outlook within the Broader Canadian and Global Context

3.4.1 Ontario Population Growth Outlook within the Canadian Context

Canada's population has experienced significant growth in recent years. During the recovery period from COVID-19, immigration targets were raised in Canada primarily in response to labour force demands faced by the country. Immigration accounts for almost 100% of Canada's labour force growth and nearly 80% of its population growth. As a result of these increased immigration targets, Canada welcomed 471,800 and 485,000 new permanent residents in 2023 and 2024, respectively. With population growth outpacing G.D.P. growth, the G.D.P. per capita has trended lower and has been recently trending well below pre-pandemic levels.^[25] The key challenges to growth in Canadian G.D.P. per capita include declining labour productivity and a rising unemployment rate for recent immigrants, which has increased from 9.5% to 12.6% over the past five years.^[26] In response to these challenges, the federal government reduced its immigration targets by 21% in 2024 compared to the previous targets in 2023. More specifically, the federal government has lowered the previous near-term immigration target of 500,000 people per year to 395,000 in 2025, 380,000 in 2026, and 365,000 in 2027 (refer to Figure 3-1). The federal government has also announced that it will reduce the percentage of non-permanent residents (N.P.R.) from 7.3% of the

^[25] Statistics Canada, Economic and Social Reports, *Canada's Gross Domestic Product Per Capita Perspectives on the Return to the Trend* report by Carter McCormack and Weimin Wang, April 24, 2024.

^[26] TD Economic Reports, Canadian Employment (July 2024), *Canada's job market softens further in July*, published August 9, 2024.



national population to 5.0% by the end of 2026.^{[27],[28],[29]} These modifications address the changing needs of the country by easing pressures on housing, infrastructure, and social services. These changes are anticipated to have a further downward impact on future population growth in Canada, including Ontario, over the next few years.^[30] Based on 2024 data and looking forward through 2025 and beyond, despite the target cuts, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

^[27] Non-permanent residents are defined by Statistics Canada as persons from another country who have been legally granted the right to live in Canada on a temporary resident permit, along with members of their family living with them. These residents include foreign workers, foreign students, the humanitarian population such as refugees, and other temporary residents.

^[28] N.P.R. share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents in Canada.

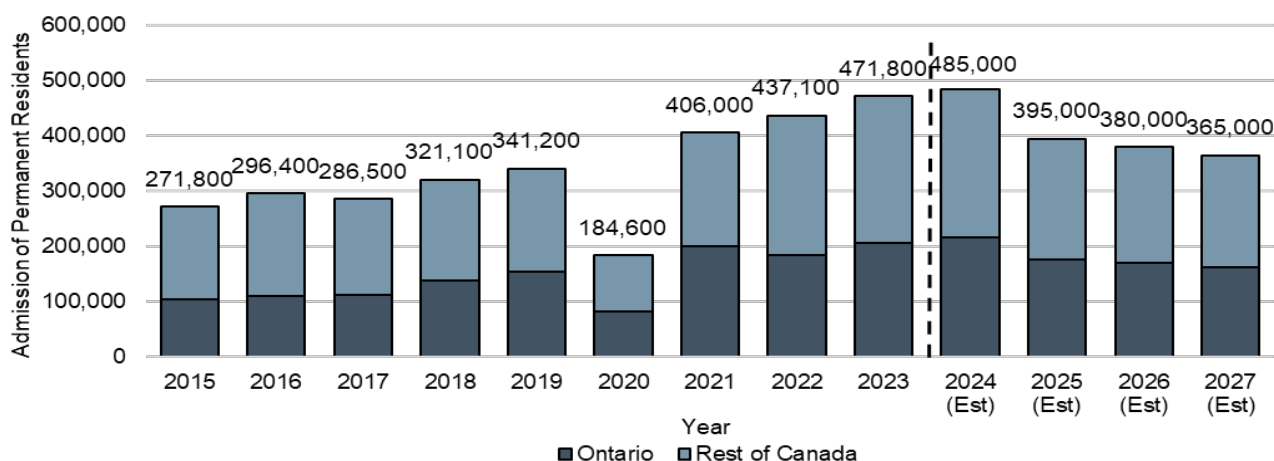
^[29] N.P.R. national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.

^[30] Government of Canada News Release, October 24, 2024.

<https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/government-of-canada-reduces-immigration.html>



Figure 3-1
Admission of Permanent Residents in Ontario and Canada
Historical (2015 to 2023) and Forecast (2024 to 2027)



Note: Figures have been rounded and may not add precisely.

Source: 2015 to 2023 derived from Immigration, Refugees and Citizenship Canada (I.R.C.C.) September 9, 2024 data; 2024 to 2027 federal targets from Government of Canada's Immigration Levels Plan for 2024-2026; and Ontario target estimated based on historical share of about 45% of the Canadian Permanent Residents Admissions from 2018 to 2023, by Watson & Associates Economists Ltd.

With respect to the provincial growth outlook, the most recent 2024 M.O.F. population projections show a decrease in the growth outlook for Ontario to 22.1 million by 2051. This reduction is largely attributed to the federal government announcement to reduce the national percentage of N.P.R. over the coming years (refer the chapter 4, Figure 4-1 further details). When examining the immigration levels required over the long term to achieve the 2024 M.O.F. projections for Ontario, these revised projections appear ambitious. The 2024 M.O.F. population forecast continues to project a higher long-term population growth rate for the province compared to historical trends experienced over the past 20 years, with an annual growth rate of 1.3% between 2021 and 2051. This translates into an annual population increase of 242,600 people. Comparatively, the level of annual population growth forecast for Ontario under the 2024 M.O.F. forecast is 65% higher than the level of population growth achieved between 2001 and 2021.



3.4.2 Provincial Gross Domestic Product Trends and Near-Term Forecast

Similar to the broader Canadian economy, the economic base of Ontario, as measured by G.D.P. output, has shifted from goods-producing sectors (i.e., manufacturing and primary resources) to services-producing sectors 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 COVID-19 pandemic and 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 economic downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding by 2014, as illustrated in Figure 3-2. This economic rebound was partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar combined with the gradual strengthening of the U.S. and Canadian economy.^[31]

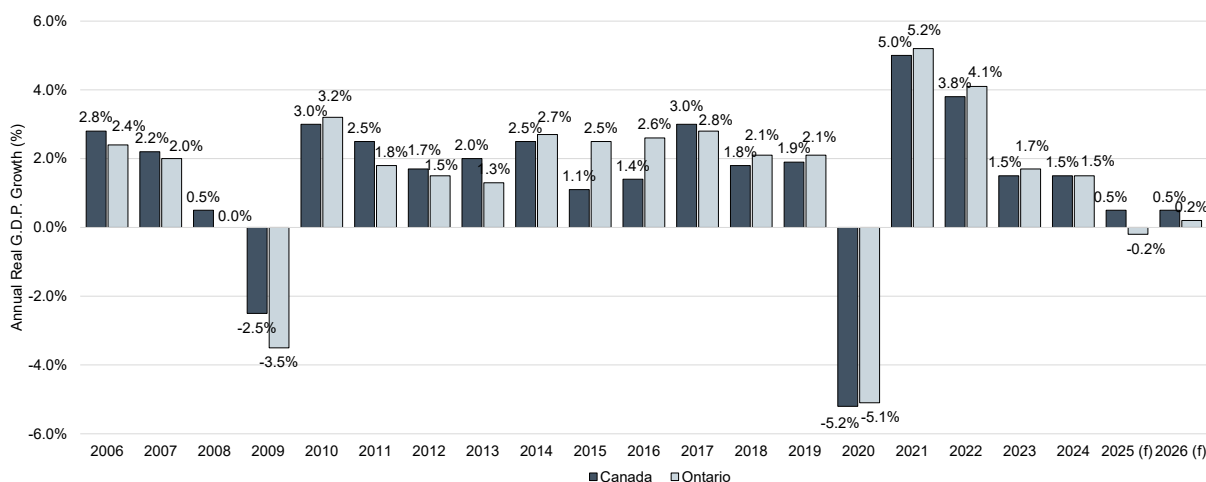
The Canadian and Ontario economy deeply contracted by 5.1% in 2020 during the onset of the COVID-19 pandemic, before sharply rebounding by 5.2% in 2021. Throughout 2022, the Ontario economy continued to expand and grew by 3.9%, while the overall Canadian economy grew by 3.8%. BMO Capital Markets has forecast that G.D.P. growth will decline to -0.2% in Ontario and 0.5% overall for Canada in 2025. For 2026, an annualized G.D.P. growth rate of 0.2% is forecast for Ontario and 0.5% for all of Canada, suggesting a significant downturn in economic growth in the near term, largely driven by global economic uncertainty in response to current U.S. tariffs and protectionist measures.^[32]

^[31] Valued at approximately \$0.72 U.S. as of April 2025.

^[32] Provincial Economic Outlook, BMO Capital Markets, March 28, 2025.



Figure 3-2
Province of Ontario and Canada
Annual Real Gross Domestic Product (G.D.P.) Growth, Historical (2006 to 2024),
and Forecast (2025 to 2026)



Note: The years 2025 and 2026 are forecasts by BMO Capital Markets Economics. The year 2024 is a forecast for the Province of Ontario.

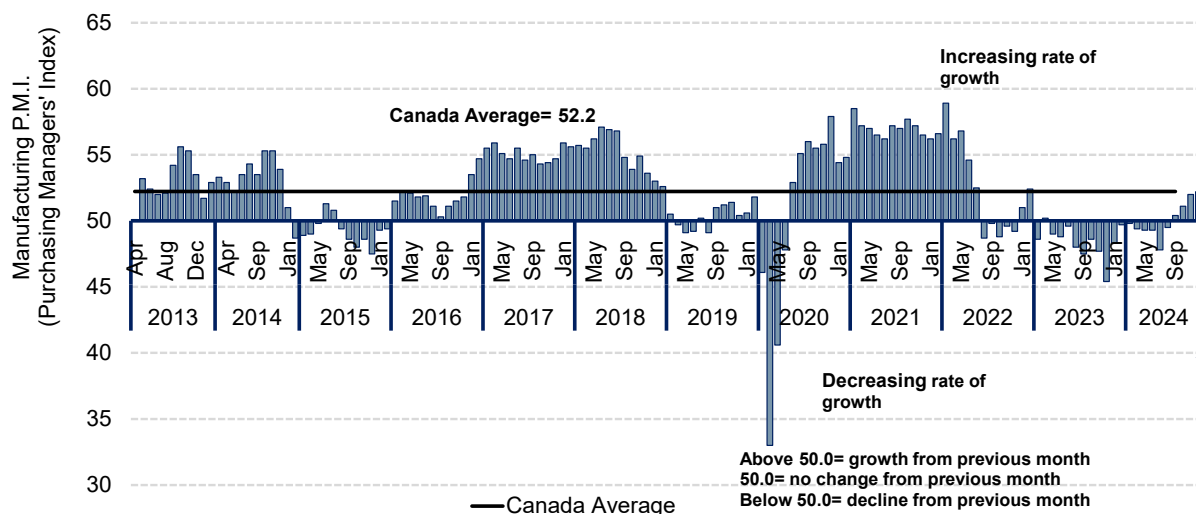
Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, March 28, 2025, by Watson & Associates Economists Ltd.

3.4.3 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. It 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. is a number that ranges between 1 and 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 3-3 summarizes the P.M.I. for Canada between 2013 (October) and 2024 (June). As illustrated, the P.M.I. largely indicated moderate to strong expansion between 2013 and 2021, with the exception of 2015, 2019, and 2020 for which the index showed sustained monthly contractions. The P.M.I. shows steep contractions in manufacturing at the beginning of March 2020 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. For the remainder of 2022 and up to August of 2024, the index showed sustained contractions before a small rebound began in September 2024.



Figure 3-3
Canada
Purchasing Managers' Index, October 2013 to December 2024



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 P.M.I. Index, June 2012 to December 2024 summarized by Watson & Associates Economists Ltd.

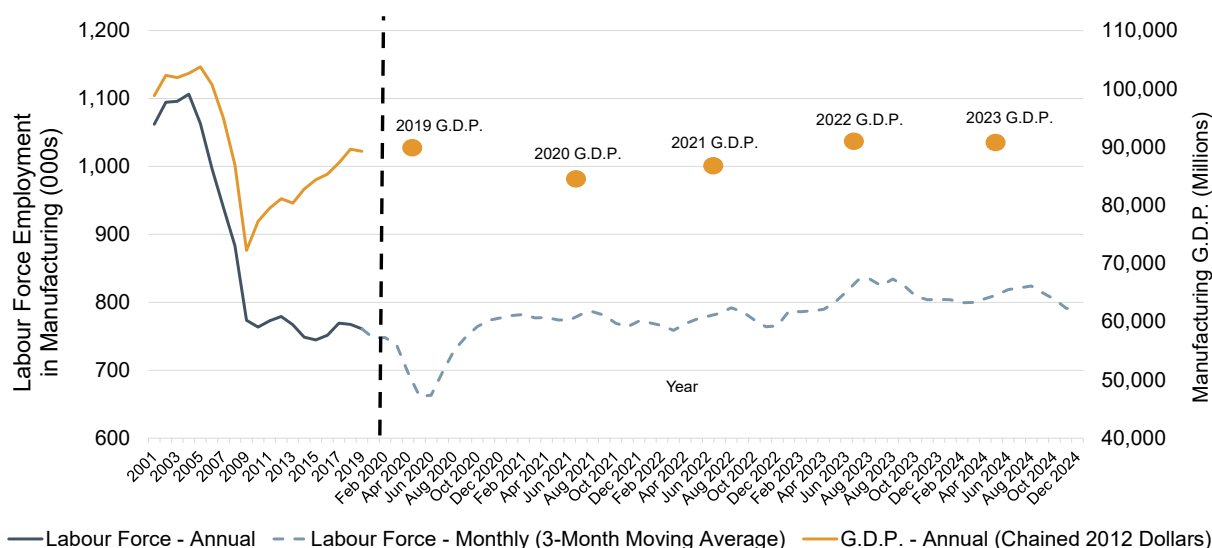
While manufacturing remains vitally important to the provincial and regional economy with respect to jobs and economic output, this sector has not represented an employment growth sector at the provincial or regional level over the past several decades. Notwithstanding these recent trends, within the London E.R. the manufacturing sector has experienced a relatively strong recovery over the past decade.

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 are anticipated to outpace labour force growth over the next decade, indicating an increasing G.D.P. output per employee.



As summarized in Figure 3-4, from 2004 to 2009, the labour force and G.D.P. of Ontario's manufacturing sector decreased significantly. Between 2009 and 2019, however, provincial labour force levels stabilized in this sector, 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.

Figure 3-4
Province of Ontario
Manufacturing Labour Force Trends
2001 to December 2024



Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, monthly data from Table 14-10-0091-01, and 2021 to 2023 monthly data from Table 14-10-0388-01. Annual gross domestic product (G.D.P.) data from Statistics Canada Table 36-10-0402-01, by Watson & Associates Economists Ltd.



3.5 Regional Labour Force and Population Growth Trends

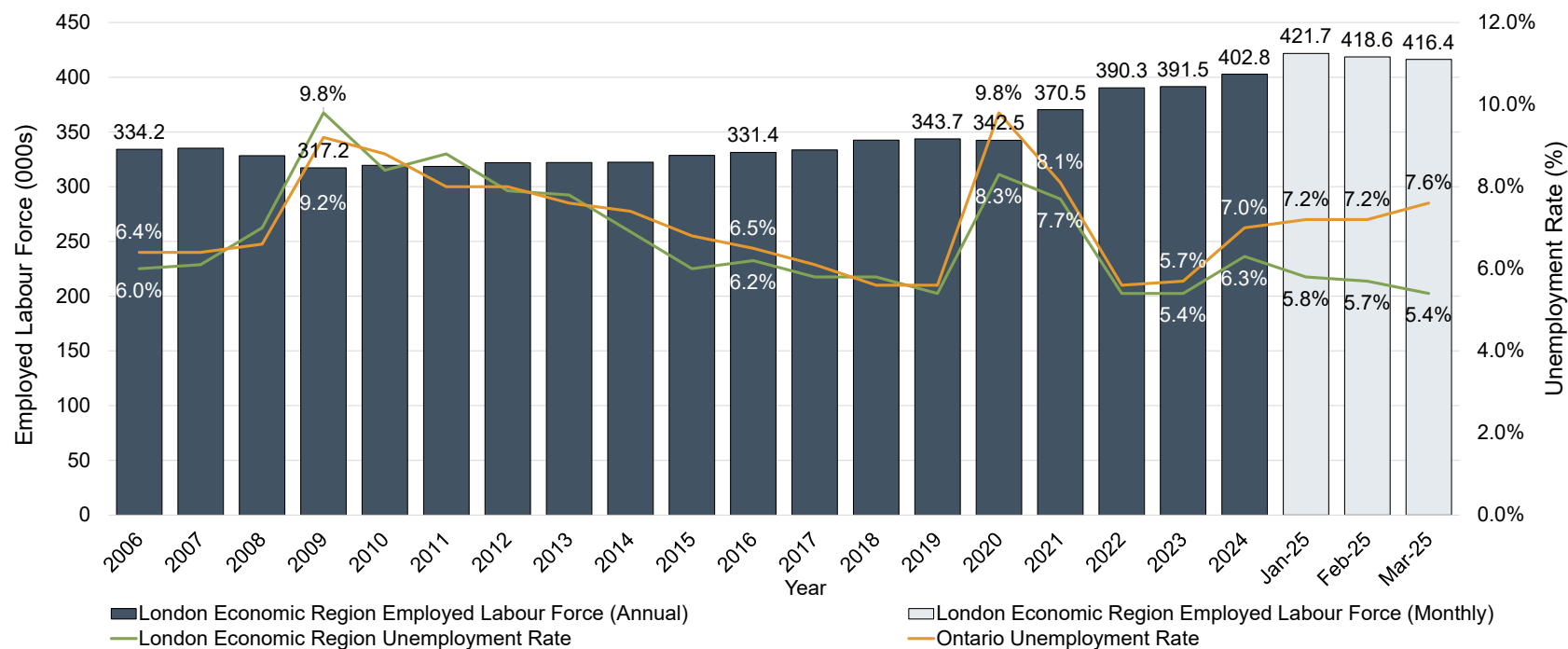
3.5.1 Regional Labour Force Growth Trends

Figure 3-5 summarizes total labour force and unemployment rate trends for the London E.R. Labour force data is not available for Middlesex County, but it is captured in the broader London E.R. Key observations include the following:

- Since 2011, the London E.R. has experienced relatively steady labour force growth, coupled with a gradually declining unemployment rate, until the COVID-19 pandemic in early 2020 caused a notable spike in unemployment.
- Following the pandemic recovery from 2020 to 2021, the labour force in the London E.R. has steadily rebounded, reaching record highs in the first quarter of 2025 at 421,700 employed individuals.
- Notwithstanding these positive economic trends, the growth rate of the labour force has slowed since early 2025, however, the regional unemployment rate has recently trended downward near 20-year historic lows, indicating tightness in the regional labour market.
- To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by the municipalities within the London E.R. (working with their public- and private-sector partners) to explore ways to attract and accommodate new skilled and unskilled working residents within a broad range of ownership and rental housing options.
- Looking forward, the medium to longer-term outlook for the regional economy remains positive over the medium- to long-term, however, regional economic conditions are anticipated to remain relatively weaker and more volatile over the short term (i.e., next 12 to 18 months) drive by current geo-political conditions and U.S. protectionist policies.



Figure 3-5
London Economic Region (E.R.)
Labour Force Trends, 2006 to 2025



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.

Source: London E.R. employed labour force and unemployment rate from Statistics Canada Table 14-10-0393-01, Table 14-10-0462-01. Province of Ontario unemployment rate from Statistics Canada Table 14-10-0323-01. Derived by Watson & Associates Economists Ltd.



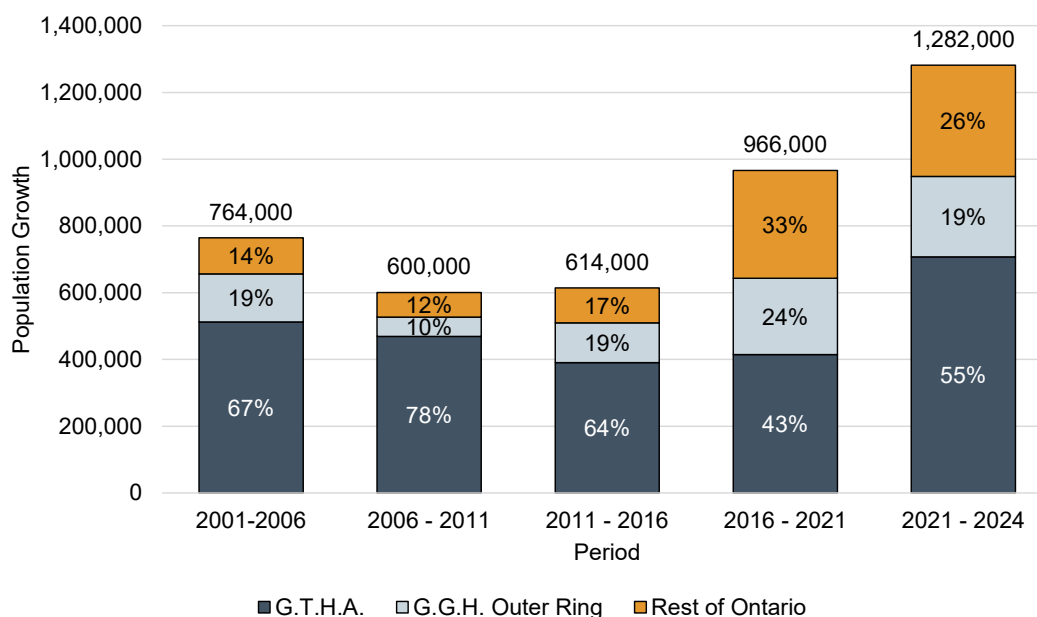
3.5.2 Provincial Population Growth Trends

Postcensal data is available through Statistics Canada for the London-Middlesex Area (i.e., Census Division), which is the smallest geographic unit for which this data is provided. Figure 3-6 illustrates the population growth in the province by sub-regional area. Key observations include the following:

- The share of population growth outside the Greater Toronto and Hamilton Area (G.T.H.A.) steadily increased over the past three Census periods, 2006 to 2021. Most notably, during the most recent Census period (i.e., 2016 to 2021), the share of total provincial population growth for all areas outside the Greater Golden Horseshoe (G.G.H.) increased from 12% between 2006 and 2011, to 17% from 2011 to 2016, and to 33% between 2016 and 2021.
- Except for the 2021 to 2024 period, the share of provincial population growth in the G.T.H.A. has declined in recent years, falling from 78% between 2006 and 2011, to 64% from 2011 to 2016, and then to 43% between 2016 and 2021.
- These historical trends in provincial population growth suggest that while the G.T.H.A. will continue to experience a large share of provincial population growth, this population share is anticipated to continue to shift outward into the G.G.H. Outer Ring and the remaining sub-areas of Ontario.



Figure 3-6
Province of Ontario by Regional Area
Population Growth, 2001 to 2024



Notes: Population includes net Census undercount. G.T.H.A. means Greater Toronto and Hamilton Area; G.G.H. means Greater Golden Horseshoe.

Source: Statistics Canada Table 17-10-0152-01, summarized by Watson & Associates Economists Ltd.

3.5.3 Long-Term Growth Outlook for London-Middlesex Area (Census Division)

There are two main components of population growth,^[33] natural increase (births less deaths) and net migration, which is further broken down into three broad categories including:

- **International Net Migration** – represents international immigration less emigrants, plus net N.P.R.s. Over the last decade, this component of net migration represented an increasing source of net migration for London-Middlesex Area;

^[33] The smallest geographic dissemination of this information is available at the Census Division level (i.e., Middlesex County, 3 Indian Reserves, and the City of London).



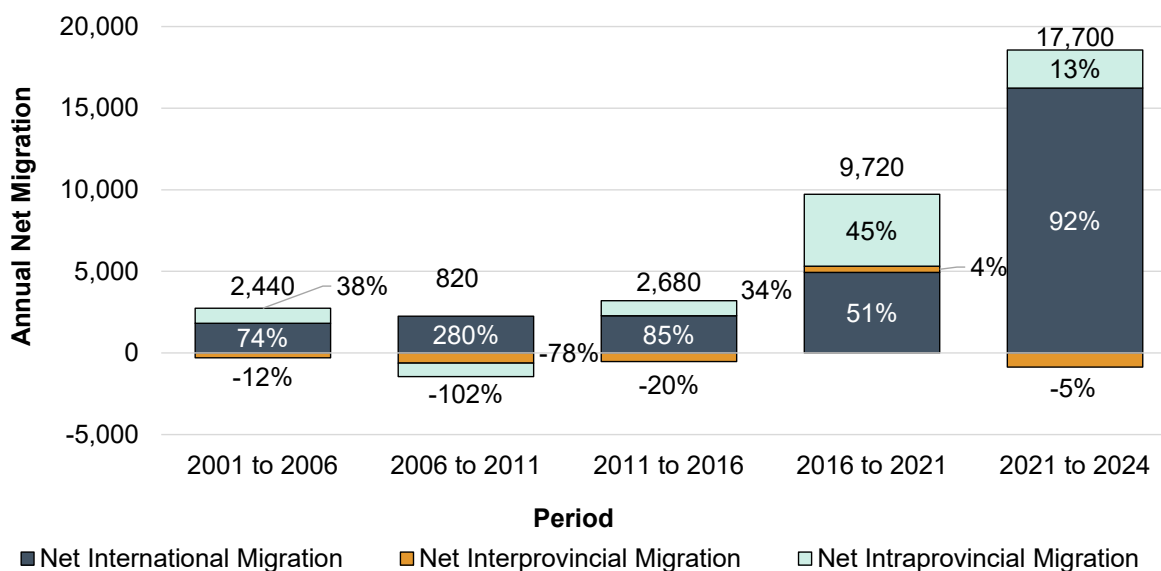
- **Interprovincial Net Migration** – comprises in-migration less out-migration from other Canadian provinces/territories. Historically, this has not been a major source of net migration for London-Middlesex Area; and
- **Intraprovincial Net Migration** – includes in-migration less out-migration from elsewhere within the Province of Ontario. This has been a significant source of net migration for the London-Middlesex Area over the last decade. Over the past eight years, however, the share of net-migration to the London-Middlesex Area from this net migration category has steadily declined with the rise of international migration.

Figure 3-7 summarizes net migration by category within the London-Middlesex Area over the past 20+ years. Historically, between 2001 and 2024, population growth within this area has been largely driven by international migration. International net migration levels increased steadily during the 2016 to 2021 period, followed by a sharp increase between 2021 and 2024.

Over the past eight years, the amount of intraprovincial net migration to the London-Middlesex Area has also sharply increased in both absolute and percentage terms. Figure 3-8 illustrates the intraprovincial net migration to the London-Middlesex Area. Over the 2015 to 2021 period, intraprovincial net migration has largely been from the G.T.H.A., and Outer Ring, accounting for 39% and 16%, respectively. Looking forward, both international and intraprovincial net migration levels are forecast to remain strong across the London-Middlesex Area. However, it is important to recognize that intraprovincial net migration levels have slowed since the 2016 to 2021 period. Furthermore, when considering recent changes to federal immigration targets, it is anticipated that annual growth in international net migration for the London-Middlesex Area will slow relative to recent annual growth rates achieved between 2021 and 2024.



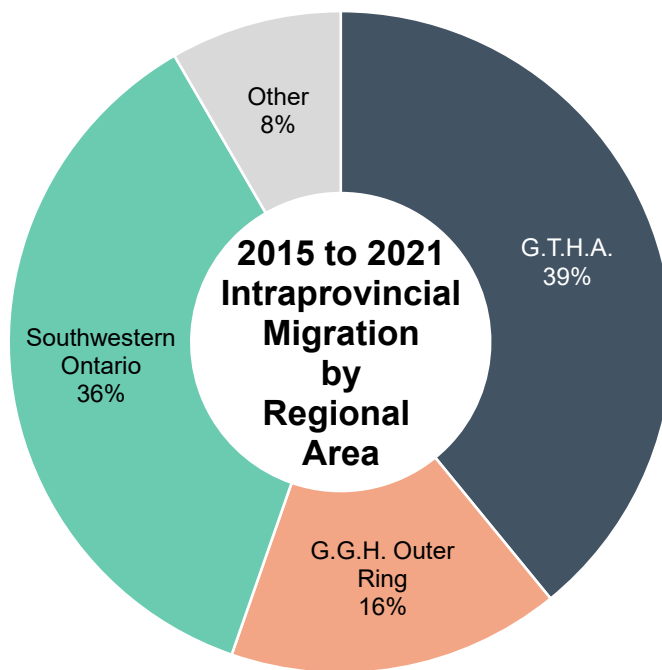
Figure 3-7
London-Middlesex Area
Net Migration by Category, 2001 to 2024



Note: Population figures include the City of London and net Census undercount. Figures have been rounded and may not add up precisely.
Source: Statistics Canada Table 17-10-0152-01 and Table 17-10-0153-01, summarized by Watson & Associates Economists Ltd.



Figure 3-8
London-Middlesex Area
Intraprovincial Migration by Regional Area, 2015 to 2021



Note: Figures have been rounded and may not add up precisely. “Other” includes areas such as Eastern Ontario, Northern Ontario, and Haliburton-Muskoka Regional Area.
Source: Derived from custom order Statistics Canada Intraprovincial Migration Flow data by Census Division by Watson & Associates Economists Ltd.

3.6 Demographic and Housing Trends in Middlesex County

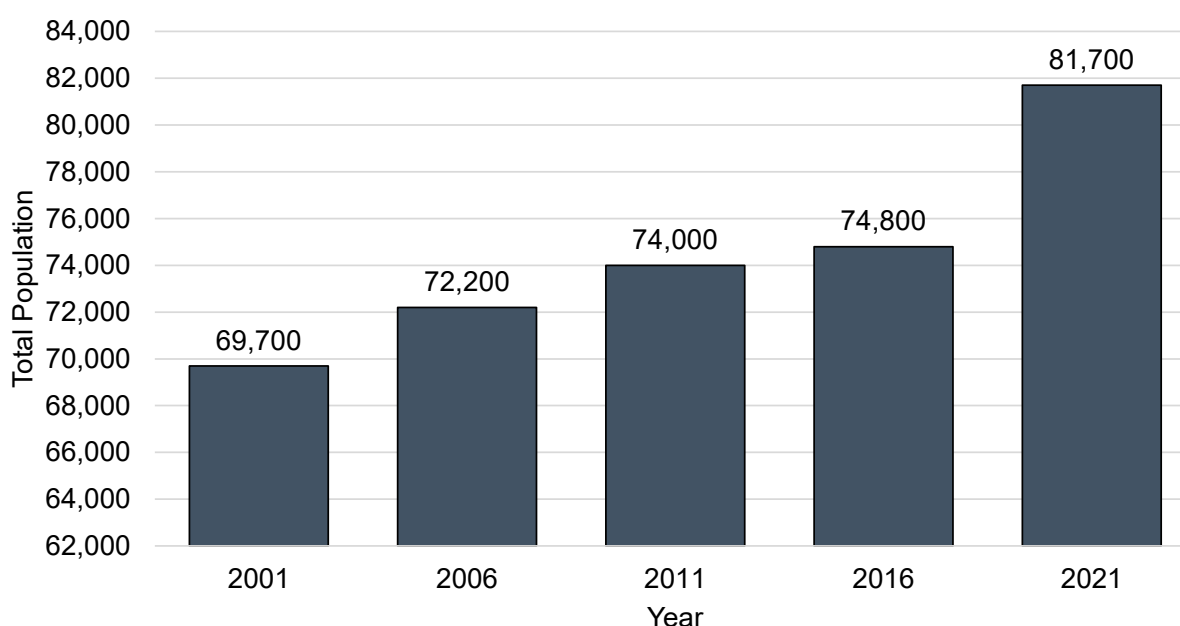
3.6.1 Historical Population Trends

Over the past two decades, the population of Middlesex County has steadily been growing. Figure 3-9 summarizes historical population trends for Middlesex County over a 20-year period from 2001 to 2021. During this period, Middlesex County’s population increased from 69,700 in 2001 to 81,700 in 2021, an increase of approximately 12,000 people, or an annual increase of 0.8%. Comparatively, the population base for the Province of Ontario grew at an annual rate of 1.1% during the same time period. Over the most recent Census period, the County’s population increased at an annual rate of approximately 1.8%, which is above the provincial average of 1.4%. Post 2021, the County’s population growth rate has accelerated further in comparison to the most



recent Census periods, however, population growth rates are now beginning to moderate with the impacts of higher mortgage rates and slowing regional economic growth. Chapter 4 provides a detailed discussion regarding the long-term population, housing and employment growth outlook for Middlesex County to the year 2056.

Figure 3-9
Middlesex County
Historical Total Population, 2001 to 2021



Note: Figure excludes the City of London, have been rounded, and include a net Census undercount estimated at 4.6%.

Source: Data derived from Statistics Canada Table 17-10-0152-01 by Watson & Associates Economists Ltd.

Figure 3-10 summarizes historical trends in population structure by major age group over the 2001 to 2021 period for Middlesex County. Similar to the province as a whole, the population across Middlesex County is getting older on average (i.e., increasing median age of the population) largely due to the aging of the Baby Boomers living within this area.^[34] The first wave of this demographic group turned 75 years of age in 2021. Within Middlesex County, the share of population in the 55+ age cohort steadily

^[34] Baby Boomers are generally defined as people born between 1946 and 1964.

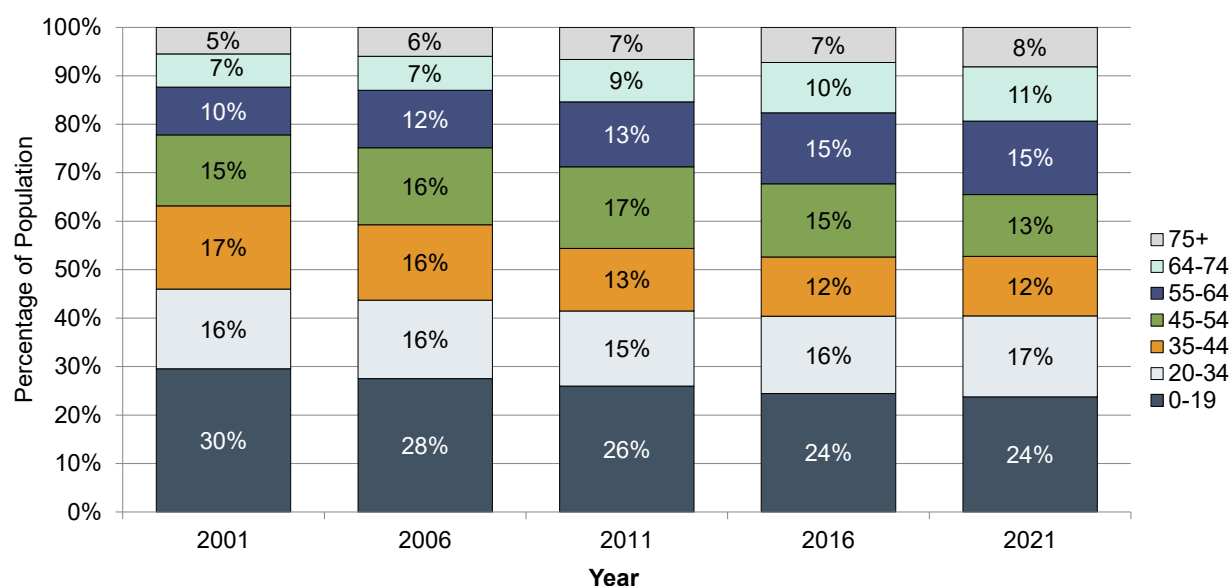


increased from 22% in 2001 to 35% in 2021. For additional information about historical population trends, please see Appendix B.

In contrast to the 55+ age cohort, the population share of the 0 to 19 age group declined from 30% in 2001 to 24% in 2021. Similarly, the share of the 35 to 54 age group steadily declined from 17% in 2001 to 12% in 2021. Lastly, the population share of the young adult population age group (20 to 34 years of age) experienced a slight increase from 16% in 2001 to 17% in 2021.

Historical and future population trends by age within Middlesex County are important to consider, as these trends have a direct impact on housing needs by structure type (i.e., grade-related housing forms vs. high-density housing types), tenure (i.e., ownership vs. rental), and municipal service needs. This is discussed in further detail in Chapter 4.

Figure 3-10
Middlesex County
Historical Permanent Population by Major Age Group, 2001 to 2021



Note: Figure excludes the City of London, have been rounded, and include a net Census undercount estimated at 4.6%.

Source: Data derived from Statistics Canada Table 17-10-0152-01 by Watson & Associates Economists Ltd.

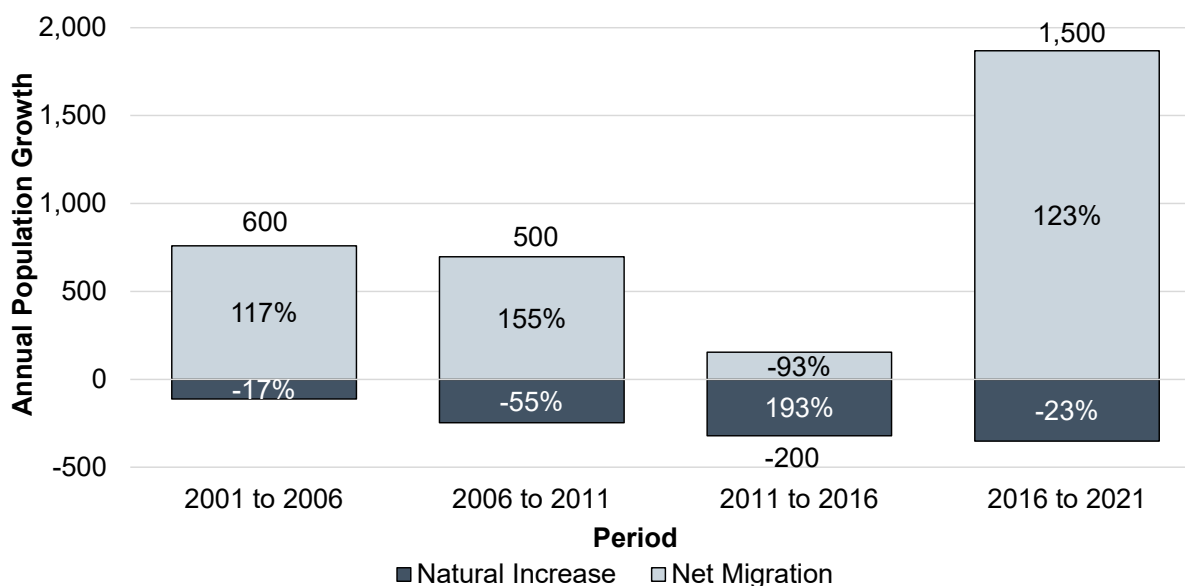


3.6.2 Historical Migration Trends by Type, 2001 to 2021

Figure 3-11 summarizes historical net migration trends for Middlesex County derived from Statistics Canada between 2001 and 2021. Key observations are as follows:

- Population growth within Middlesex County has been largely driven by net migration. With the exception of the 2011 to 2016 Census period, net migration had been increasing in Middlesex County.
- Between 2016 and 2021, Middlesex County experienced a sharp increase in population, averaging 1,500 people per year, and net migration accounting for 123% of total population growth during that period.
- The province as a whole also experienced stronger net migration levels during the 2016 to 2021 period relative to the previous recent Census periods, largely driven by higher federal immigration targets in recent years. For Middlesex County, the recent increase in net migration levels is believed to be largely driven by intraprovincial net migration.

Figure 3-11
Middlesex County
Components of Population Growth, 2001 to 2021



Note: Figure excludes the City of London, have been rounded and include net Census undercount estimated at 4.6%.

Source: Data derived from Statistics Canada Table 17-10-0153-01 by Watson & Associates Economists Ltd.



3.6.3 Housing Trends

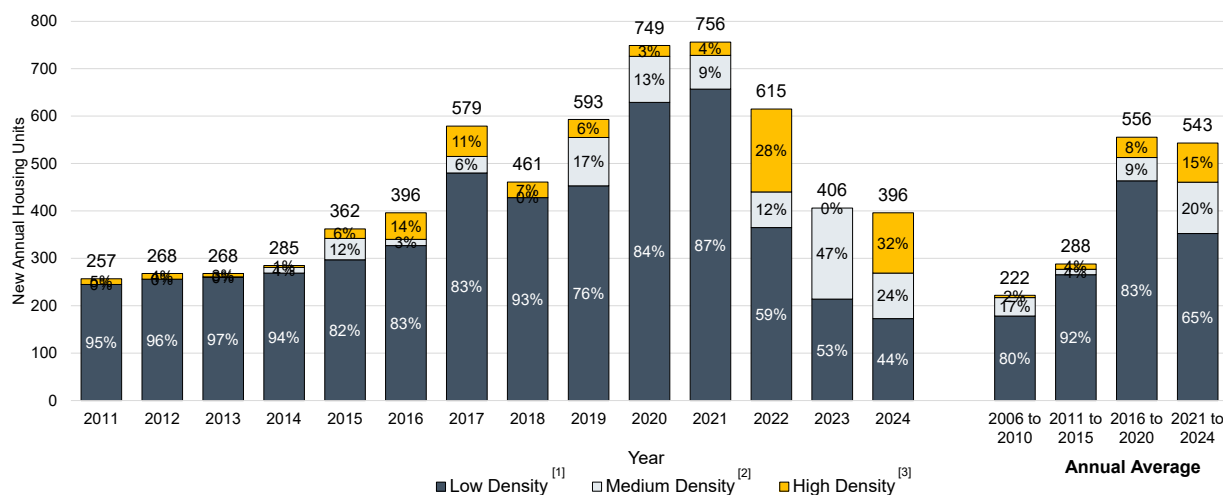
3.6.3.1 Historical Building Permit Activity

Figure 3-12 summarizes total residential building permits (new units only) by structure type between 2011 and 2024 within Middlesex County. Key findings are as follows:

- Over the 2011 to 2015 period, Middlesex County averaged 288 residential building permits per year. This annual average increased to 556 permits per year between 2016 and 2020, followed by a slight decrease of 543 permits per year between 2021 to 2024.
- Since the COVID-19 peak in 2020 and 2021 annual residential permit activity for new units has steadily declined.
- Historically, development activity has been largely dominated by low-density units; however, since 2015, the County has experienced an increase in medium-density and high-density development.
- Of the total building permits issued for new dwellings from 2011 to 2024 across the County, more than 75% were collectively issued in the Municipality of Middlesex Centre, the Municipality of Strathroy-Caradoc, and the Municipality of Thames Centre.



Figure 3-12
Middlesex County
Total Residential Building Permits by Structure Type, 2011 to 2024



[1] Low density includes single and semi-detached houses.

[2] Medium density includes townhouses and apartments in duplexes.

[3] High density includes apartment units.

Note: Figure excludes the City of London.

Source: Building permits derived from Statistics Canada's monthly building permit data by Watson & Associates Economists Ltd.

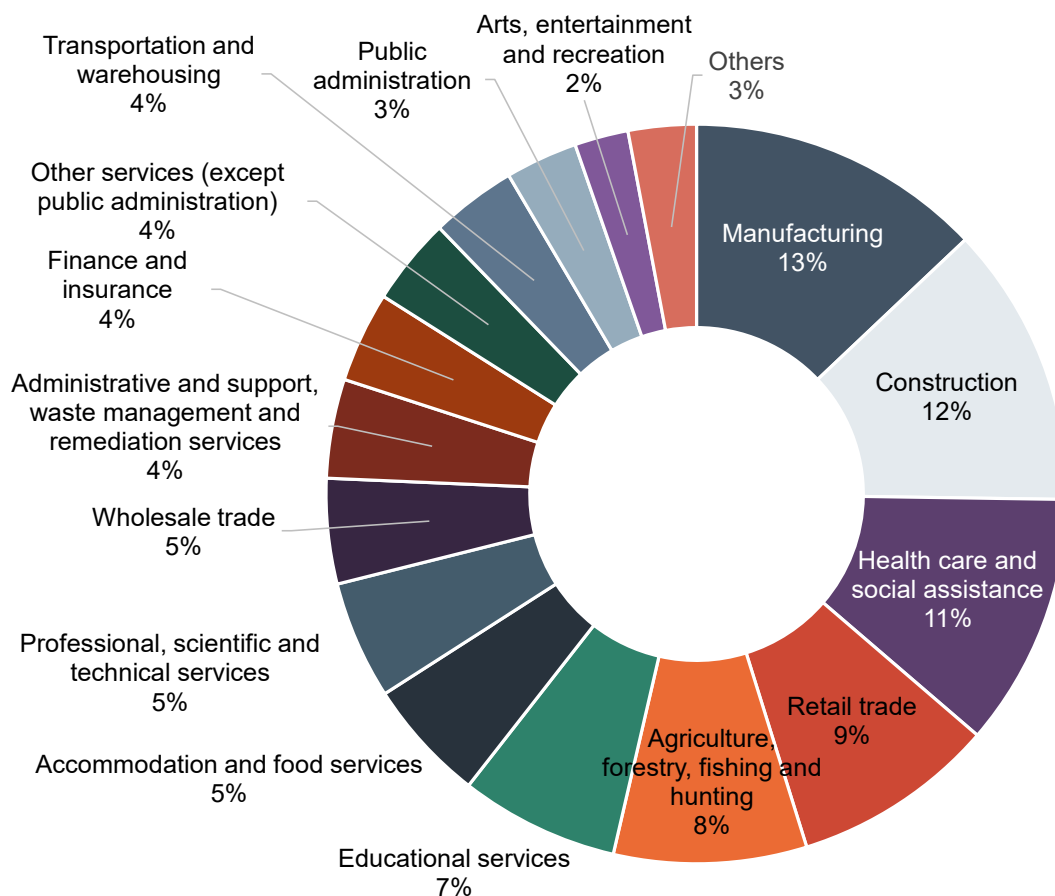
3.7 Recent Non-Residential Development Trends

3.7.1 Local Employment Trends by Sector

Middlesex County has a diverse employment base, as illustrated in Figure 3-13. The largest employment sector in the County is manufacturing, which accounts for 13% of the total employment. Other key sectors include construction; health care and social assistance; retail trade; agriculture, forestry, fishing and hunting; and educational services. With the exception of manufacturing and construction, most jobs in the County are focused on services-producing sectors rather than goods-producing sectors.



Figure 3-13
Middlesex County
Total Employment by Industry Sector, 2024



Note: Figures have been rounded and may not add precisely.

Source: Data derived from Lightcast data for Middlesex County (excluding City of London), summarized by Watson & Associates Economists Ltd.



4. Middlesex County's Long-Term Population, Housing, and Employment Growth

This chapter discusses the long-range population, housing, and employment growth scenarios for Middlesex County to the year 2056. As part of this growth analysis study, a recommended long-term growth forecast has been prepared for Middlesex County, based on a detailed assessment of the County's long-term growth outlook within the context of growth trends for the Province of Ontario, Southwestern Ontario, and London-Middlesex Area (i.e., Census Division) over the next several decades.

In accordance with the demographic, economic, and socio-economic trends discussed in Chapter 3, and the key growth assumptions identified in Chapter 4, four long-term population and housing forecasts, including a Low, Medium, Medium-High, and High Population Growth Scenario, have been prepared for Middlesex County to the year 2056. These long-term population and housing scenarios also consider the long-term demographic and economic outlook for the province and each of the sub-regions within Southern Ontario. These broader demographic trends, as discussed further below, are expected to have a direct impact on how the population, housing, and employment base within Middlesex County and its Area Municipalities changes over the next three decades.

4.1 Population Growth Outlook for the Province of Ontario, 2021 to 2051

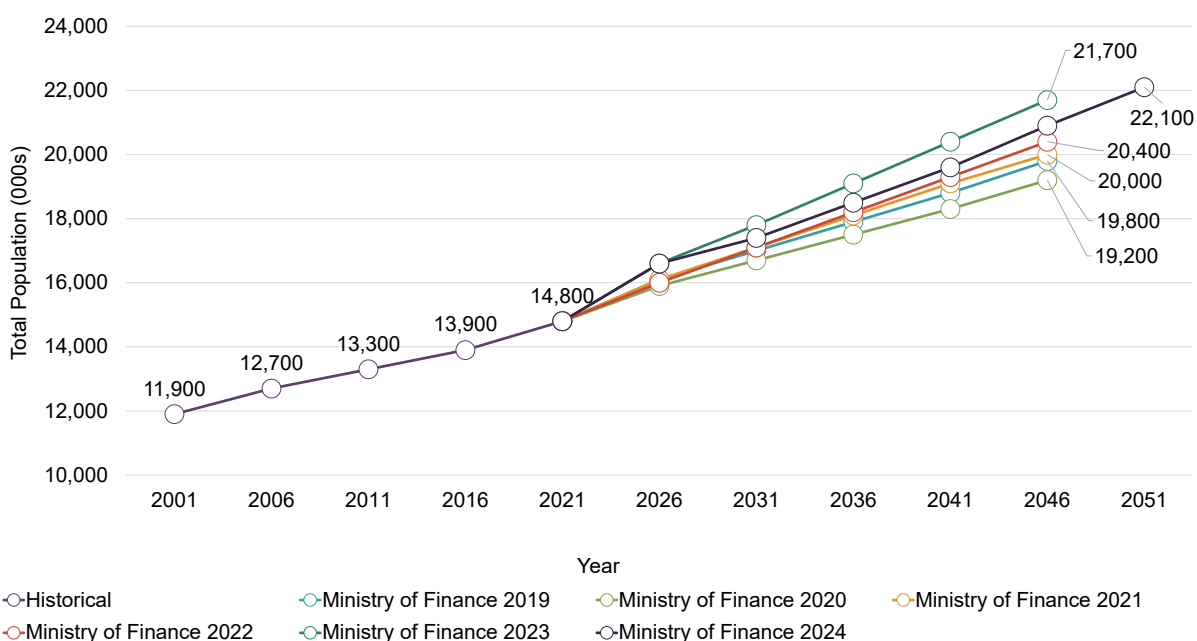
Figure 4-1 illustrates how the population for the Province of Ontario has changed over the past 20 years and how the provincial population is forecast to grow to the year 2046 and 2051 in accordance with M.O.F. population projections since 2019. Key observations are as follows:

- Historically, the Province of Ontario grew annually at a rate of approximately 1.1% between 2001 and 2021, reaching a population of 14.8 million in 2021.
- Since 2019, with each new annual release (with the exception of the 2024 release), the M.O.F. population projections for Ontario have shown a consistent upward trend in the province's annual population growth rate, reflecting increasing expectations for population growth in the coming decades.



- The latest Fall 2024 M.O.F. update indicates that Ontario's population is projected to grow at an annual rate of around 1.3% from 2021 to 2051, adding approximately 243,000 people per year and reaching a population of 22.1 million by 2051.

Figure 4-1
Province of Ontario
Ministry of Finance Population Projections, 2019 to 2024



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical 2001 to 2021 data from Statistics Canada Table: 17-10-0152-01, and Ministry of Finance projections from Summer 2019, Spring 2020, Spring 2021, Summer 2022, Summer 2023, and Fall 2024 releases derived by Watson & Associates Economists Ltd.



4.2 Southern Ontario's Evolving Demographic and Economic Landscape

Figure 4-2 and 4-3 summarize the historical and forecast annual population growth rates for each of the sub-regions within Southern Ontario, including: 1) Southwestern Ontario; 2) the G.T.H.A.; 3) the G.G.H. Outer Ring; 4) Eastern Ontario; and 5) the Near North in accordance with the M.O.F. 2024 projections.^[35] The population projections provided in Figure 4-2 are generated by the Ontario M.O.F., aggregated at the C.D. level, annually, to reflect the most up-to-date trends and historical data.^{[36], [37]}

Figure 4-2
Historical Annual Population Growth Rates, 2001 to 2021 vs. Forecast Annual Population Growth Rates by Southern Ontario Sub-Regions, 2021 to 2051

Area	Historical Annual Growth Rate (2001 to 2021)	Forecast Annual Growth Rate (2021 to 2051)
G.G.H. Outer Ring	1.1%	1.5%
G.T.H.A.	1.4%	1.3%
Southwestern Ontario	0.9%	1.3%
Eastern Ontario	1.0%	1.4%
Near North ^[1]	1.1%	1.2%
Province of Ontario	1.1%	1.3%

^[1] Near North includes the District of Muskoka, Haliburton County, and the District of Parry Sound.

Source: Historical derived from Statistics Canada Census 2001 to 2021. Forecast derived from Ministry of Finance Population Projection for Fall 2024 by Watson & Associates Economists Ltd.

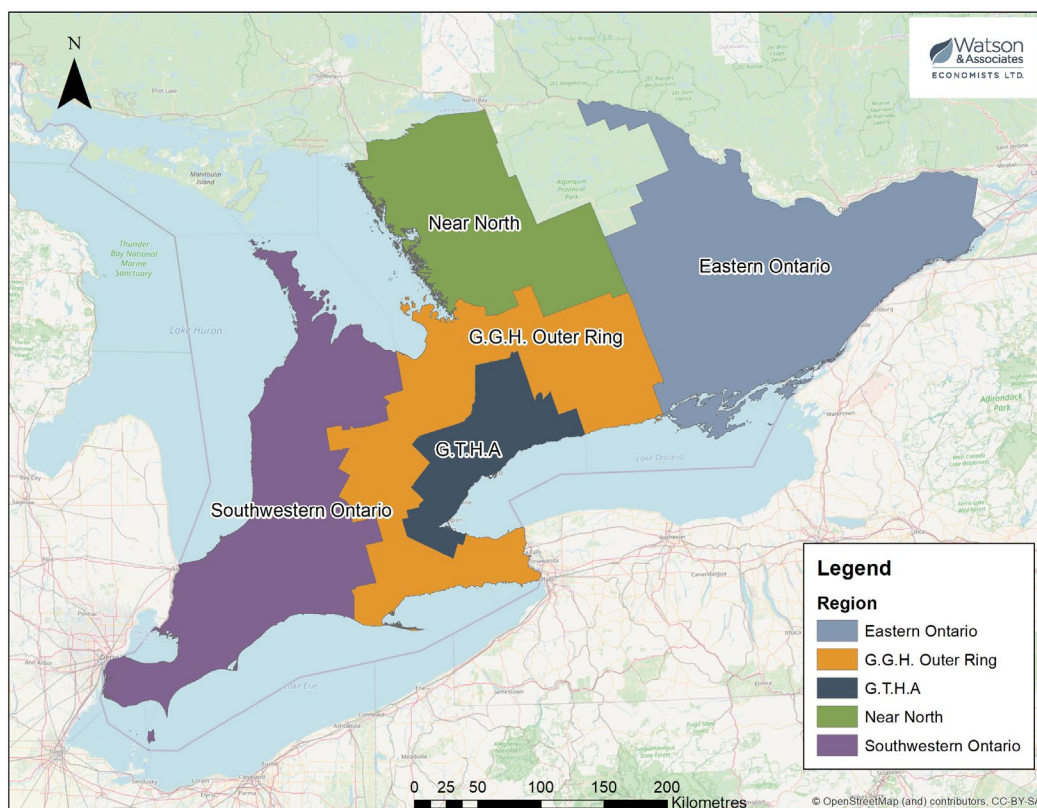
^[35] Note that sub-regions 2 and 3 collectively form Central Ontario within Southern Ontario. Near North includes the District of Muskoka, Haliburton County, and the District of Parry Sound.

^[36] In accordance with Statistics Canada, Census Divisions consist of upper-tier municipalities (County, District, and Regional municipalities), as well as administratively separated single-tier municipalities and large urban single-tier municipalities.

^[37] Ontario Population Projections Update, 2023-2051. Ministry of Finance. Fall 2024.



Figure 4-3
Southern Ontario Geographic Sub-Regions



Within the sub-regions of Southern Ontario, annual population growth rates were historically much higher in the G.T.H.A. relative to the province as a whole. Over the next 30 years, however, the divergence in annual population growth rates between the G.T.H.A. and the remaining Southern Ontario sub-regions is anticipated to continue to narrow, largely driven by continued outward growth pressure from the G.T.H.A. to the surrounding sub-regions of Southern Ontario. These trends have already been observed in the 2021 Statistics Canada Census and are anticipated to continue over the long term. The basis for these anticipated demographic changes and the implications for Middlesex County are further discussed below.

1) The population growth outlook has strengthened for Ontario, driven by higher federal immigration targets and a stronger forward-looking immigration outlook for the province.

- The stronger provincial growth outlook established by the M.O.F. is largely driven by relatively stronger immigration levels to Ontario over the longer



term, including significant increases in population growth associated with N.P.R. in recent years.^[38] Over the past decade, Ontario's strengthening export-based economy has been a key driver of increased immigration to the province.

- Over the past five years, international migration (immigration) levels have increased for each of the Southern Ontario sub-regions outside Central Ontario, except for the Near North sub-region where higher population growth rates have been almost exclusively driven by increased intraprovincial net migration levels, largely coming from the G.T.H.A.

2) Continued outward growth pressure from the G.G.H. represents a driving factor of population growth to Southern Ontario's other sub-regions.

- As summarized in Figure 4-4, the G.T.H.A.'s net migration has historically been driven by international migrants. For areas outside the G.T.H.A., however, 57% of net migration was driven by intraprovincial migration between 2016 and 2021, as shown in Figure 4-5. Since 2021, the share of intraprovincial net migration to total net migration outside of the G.T.H.A. has fallen as a result of significantly higher net migration associated with N.P.R., however, absolute levels of intraprovincial net migration outside of G.T.H.A. remain strong. It is also important to recognize that this trend toward increased outward urban growth pressure also exists at the sub-regional level across many of Southern Ontario's other larger urban centres, including the City of Ottawa, the City of London, the Kitchener-Waterloo area, the City of Windsor, and the City of Kingston.

As previously shown in Figure 3-8, the G.T.H.A. and Outer Ring represented 39% and 16%, respectively, of net intraprovincial net migration reported for the London-Middlesex Area over the past Census period. For Middlesex County, outward growth pressure from the City of London and the G.G.H. represents the primary driver of permanent population growth over the long term. Across Middlesex County, these trends are anticipated to continue but will moderate relative to recent trends

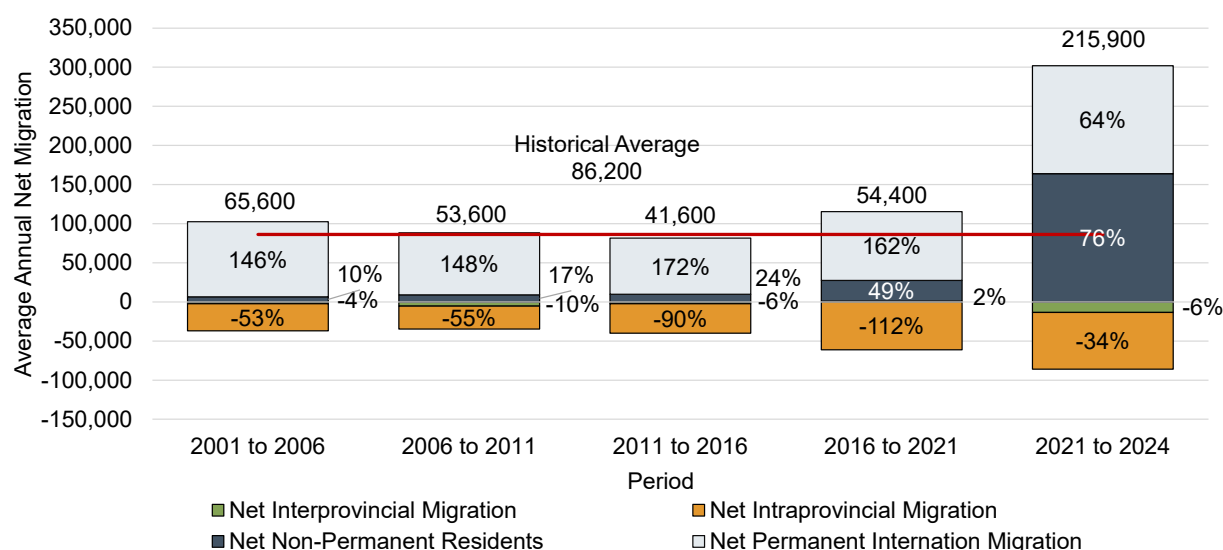
^[38] Non-permanent residents are defined by Statistics Canada as persons from another country who have been legally granted the right to live in Canada on a temporary resident permit, along with members of their family living with them. These residents include foreign workers, foreign students, the humanitarian population such as refugees, and other temporary residents.



experienced between 2016 and 2024. Key factors that support these continued trends include:

- The relative decline in housing affordability within the G.G.H., compared to Middlesex County.
- A gradual strengthening of regional economic conditions within the surrounding municipalities that comprise the Middlesex County commuter-shed (i.e., steady labour force growth within both services-producing and goods-producing sectors).
- Changes to the nature of work, led by technological improvements and increased options for remote/hybrid work, were accelerated during the COVID-19 pandemic.
- Lifestyle preferences as some residents from larger Urban Centres of the G.G.H. continue to exchange “city lifestyles” for a greater balance of urban and rural living.

Figure 4-4
Greater Toronto Hamilton Area
Historical Net Migration by Type, 2001 to 2024

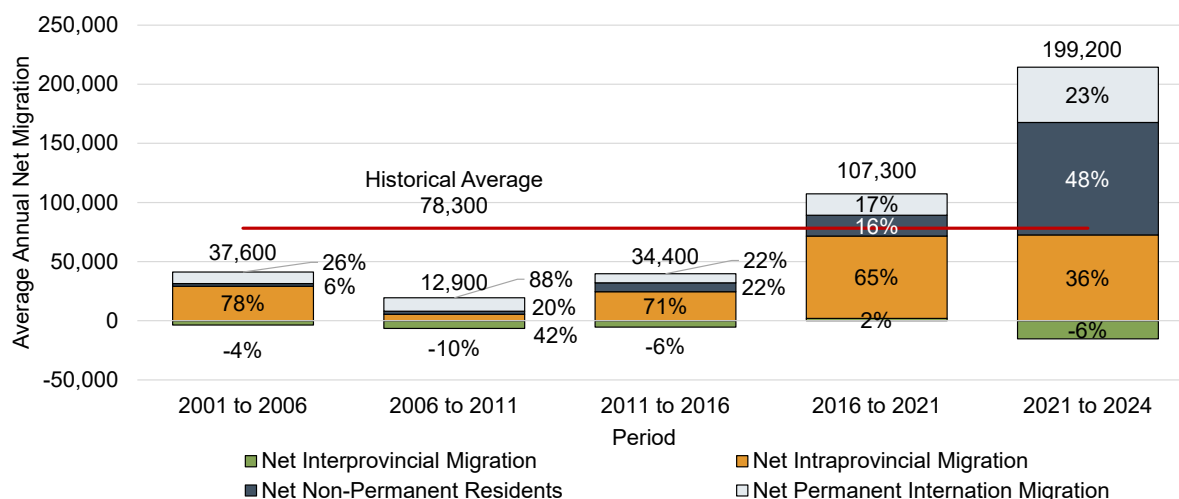


Note: Figures have been rounded and include a net Census undercount.

Source: Derived from Statistics Canada Table 17-10-0153-01 (components of population change by Census Division, 2021 boundaries), by Watson & Associates Economists Ltd.



Figure 4-5
Ontario Less the Greater Toronto and Hamilton Area
Historical Net Migration by Type, 2001 to 2024



Note: Figures have been rounded and include a net Census undercount.

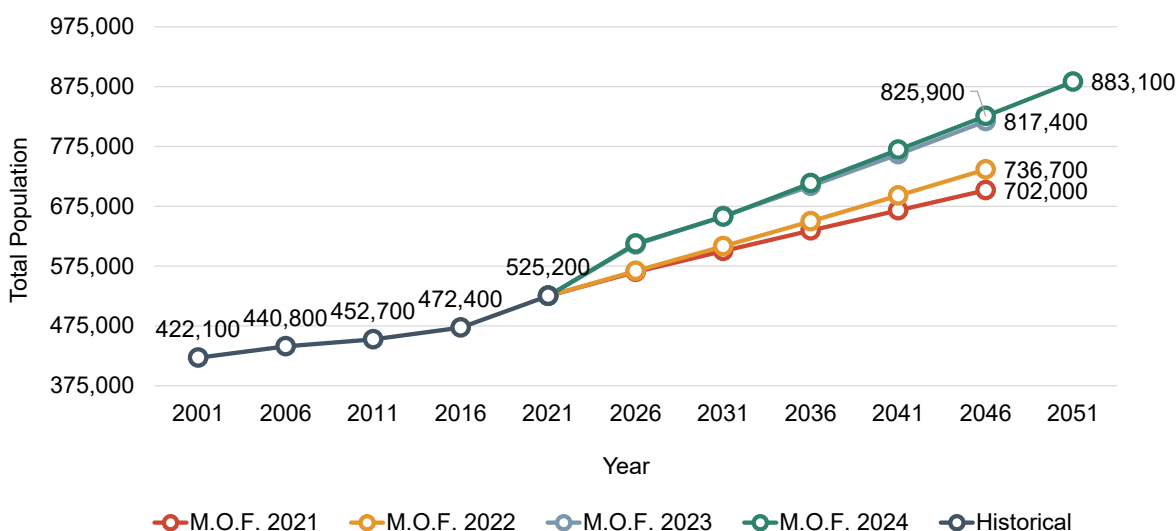
Source: Derived from Statistics Canada Table 17-10-0153-01 (components of population change by Census Division, 2021 boundaries) by Watson & Associates Economists Ltd.

4.3 Ministry of Finance Long-Term Population Growth for London-Middlesex Area (Census Division)

Figure 4-6 summarizes the population projections to 2051 for London-Middlesex Area, as prepared by the M.O.F. between 2021 and 2024. Over the past five years, the London-Middlesex Area's annual population growth rate, in accordance with the M.O.F. projections, has increased from 1.3% to 1.8%. By 2051, the population of the London-Middlesex Area is forecast to reach approximately 883,100 people. It is noted that the M.O.F. population forecast for the London-Middlesex Area does not specifically address the potential for economic trends (i.e., local and regional employment opportunities) and/or other lifestyle factors.



Figure 4-6
Ministry of Finance Population Forecasts for London-Middlesex Area (Census Division),
2001 to 2051



Note: Population includes net Census undercount. Figures have been rounded.
Population figure includes the City of London.

Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01, and Ministry of Finance (M.O.F.) Projections from Spring 2021, Summer 2022, Summer 2023, and Fall 2024 releases derived by Watson & Associates Economists Ltd.

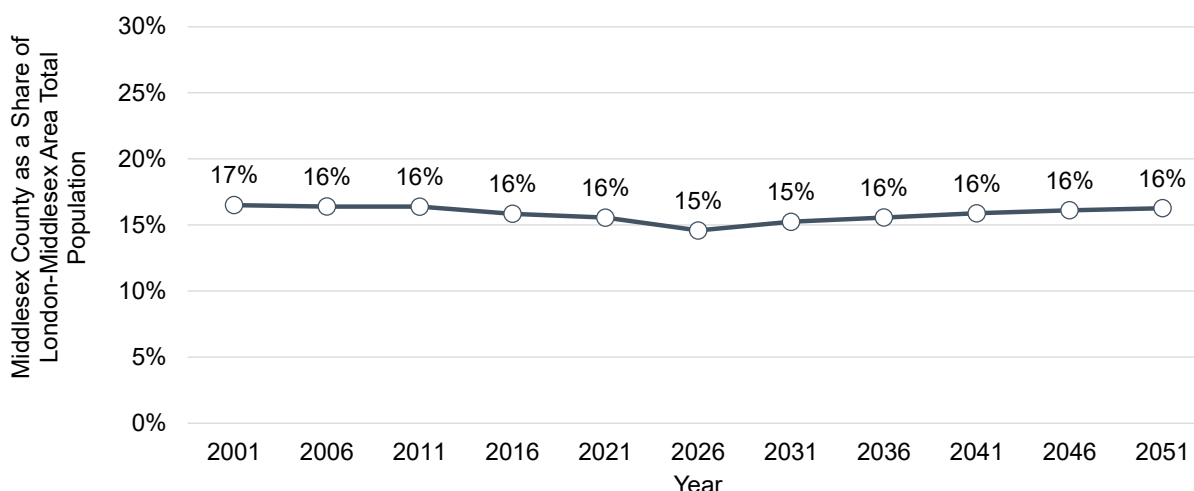
4.4 Middlesex County Reference Population Forecast Share of the London-Middlesex Area

Figure 4-7 summarizes the share of Middlesex County's population as a proportion of total population to the London-Middlesex Area. Historically, the County's share of the London-Middlesex Area population has been relatively steady at 16% from 2001 to 2021. Over the 2021 to 2051 forecast period, this share is projected to remain relatively constant at 15% to 16%.^[39]

^[39] A 2051 forecast horizon is used for the purposes of sections 4.3 and 4.4 and Figures 4-6 and 4-7 because the London-Middlesex Area forecast has a 2051 long-term forecast horizon as per the Fall 2024 M.O.F. population projections.



Figure 4-7
Middlesex County
Share of London-Middlesex Population, Reference Scenario, 2001 to 2051



Note: Population includes net Census undercount estimated at 4.6%.

Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; forecast prepared by Watson & Associates Economists Ltd.

4.5 Key Assumptions Regarding Long-Term Population Growth Scenarios, 2021 to 2056

Section 4.6 presents the long-term population forecast for Middlesex County to the year 2056. It is recognized that, over the long term, a range of population growth outcomes can be expected for the County based on a number of economic and demographic assumptions. Accordingly, several long-term growth scenarios have been prepared, including a Low, Medium, Medium-High, and High Population Growth Scenario. Please refer to Appendix C for additional details regarding the population and housing forecast scenarios for Middlesex County. Provided below is a brief overview of the key macro-economic assumptions assumed under each of the four long-range population growth scenarios.



4.5.1 Macro-Economic Conditions

As previously discussed in Chapter 3, the COVID-19 pandemic had a significant economic impact on the national and provincial economy in 2020 and 2021. While the initial shock has subsided, its effects continue to shape economic conditions. Under the County's Low Population Growth Scenario, it is assumed that the provincial economy will generally underperform relative to the near-term G.D.P. forecasts, as currently set out and updated in subsection 3.4.2. The Medium Population Growth Scenario assumes that provincial G.D.P. growth will meet future provincial near-term G.D.P. forecasts, while the Medium-High and High Population Scenarios assume that provincial near-term G.D.P. forecasts are anticipated to be exceeded.

4.5.2 National Immigration Trends

Section 3.4.1 of this report provides a discussion regarding federal immigration targets for Canada and Ontario. Under the Low Population Growth Scenario, it is assumed that national immigration will underperform relative to federal targets over the 2021 to 2051 planning horizon. The Medium Population Growth Scenario assumes national immigration targets will be met, while Medium-High and the High Population Growth Scenario assumes that federal immigration targets will be exceeded. Under each of the long-term growth scenarios, it is assumed that the share of total provincial net migration allocated in the County will remain steady or modestly increase relative to historical trends experienced over the past 20 years.

4.6 Long-Term Population Growth Scenarios for Middlesex County, 2021 to 2056

Figure 4-8 summarizes each of the long-term population growth scenarios for Middlesex County to the year 2056, as well as the Reference Scenario from the 2020 Growth Projections Study, for comparative purposes. Key observations are as follows:

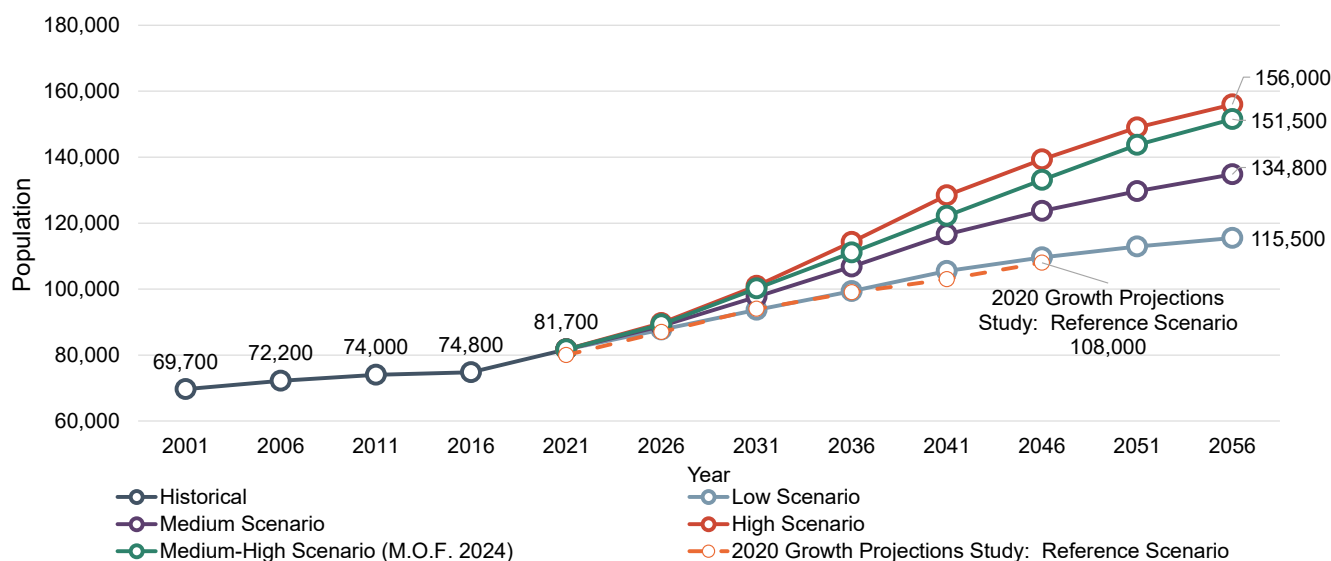
- The historical population of Middlesex County grew from 69,700 in 2001 to 81,700 in 2021, representing steady growth over the 20-year period.
- Under the Low Growth Population Scenario forecast, the population of Middlesex County is expected to reach 115,500 by 2056, representing an average annual growth rate of 1.0%, which is slightly higher than the 0.8% the County has historically achieved over the past two decades.



- Under the Medium Growth Population Scenario, Middlesex County's population is projected to reach 134,800 by 2056, achieving an average annual growth rate of 1.4% over the next three decades.
- The Medium-High Population Growth Scenario has been derived from the Fall 2024 M.O.F. projections for Middlesex County. Under this scenario, Middlesex County is expected to reach a population of 151,500 by 2056 with an annual average growth rate of 1.8%.
- Under the High Growth Population Scenario, Middlesex County's population is expected to reach 156,000 by 2056, representing the most optimistic growth trajectory, significantly higher than historical growth rates, achieving an annual growth rate of 1.9%.
- These observations indicate a range of plausible long-term population growth outlooks for Middlesex County, each providing a range of potential long-term outcomes for the County with respect to population growth and corresponding housing needs for the County.



Figure 4-8
Middlesex County
Total Population, 2001 to 2056



Scenarios	2021	2026	2031	2036	2041	2046	2051	2056
Low Population Growth Scenario	81,700	87,700	93,700	99,400	105,500	109,600	112,900	115,500
Medium Population Growth Scenario	81,700	88,800	97,700	106,800	116,600	123,700	129,700	134,800
Medium-High (Reference) Population Growth Scenario	81,700	89,300	100,200	111,100	122,200	133,100	143,700	151,500
High Population Growth Scenario	81,700	89,700	101,000	114,300	128,400	139,300	149,000	156,000

Note: Population includes net Census undercount estimated at 4.6% and figures have been rounded.

Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; forecast prepared by Watson & Associates Economists Ltd.



Each of the population growth scenarios provided in Figure 4-8 indicate that the long-term population growth outlook for Middlesex County will be strong relative to population growth trends the County has experienced over the past two decades and beyond. Of the four long-term population growth scenarios prepared for Middlesex County, the Medium-High Growth Scenario is the recommended forecast for the County for the following reasons:

1. The Medium-High Growth Scenario represents an ambitious, yet plausible rate of future population growth relative to historical trends, considering recent and forecast immigration levels expected for Canada and Ontario over the next several years and longer-term population growth forecasts for the province. As previously noted, continued outward growth pressure from the City of London and G.G.H. will continue to represent the largest driver of population growth for Middlesex County.
2. Population growth in Middlesex County will continue to be largely driven by net migration (immigration) of working-age adults. Forecast near- and long-term trends in net migration are ambitious, but plausible, for the purposes of long-range planning within the context of federal immigration targets anticipated population growth rates and migration patterns across the London-Middlesex Area.
3. The forecast level of annual new housing development required to accommodate the recommended population growth forecast for Middlesex County represents an ambitious outlook in housing activity relative to historical trends. Under the P.P.S., 2024, policy framework, the County has the flexibility to plan for a 20- to 30-year horizon with respect to the accommodation of future housing and urban land needs associated with the recommended long-range growth scenario.

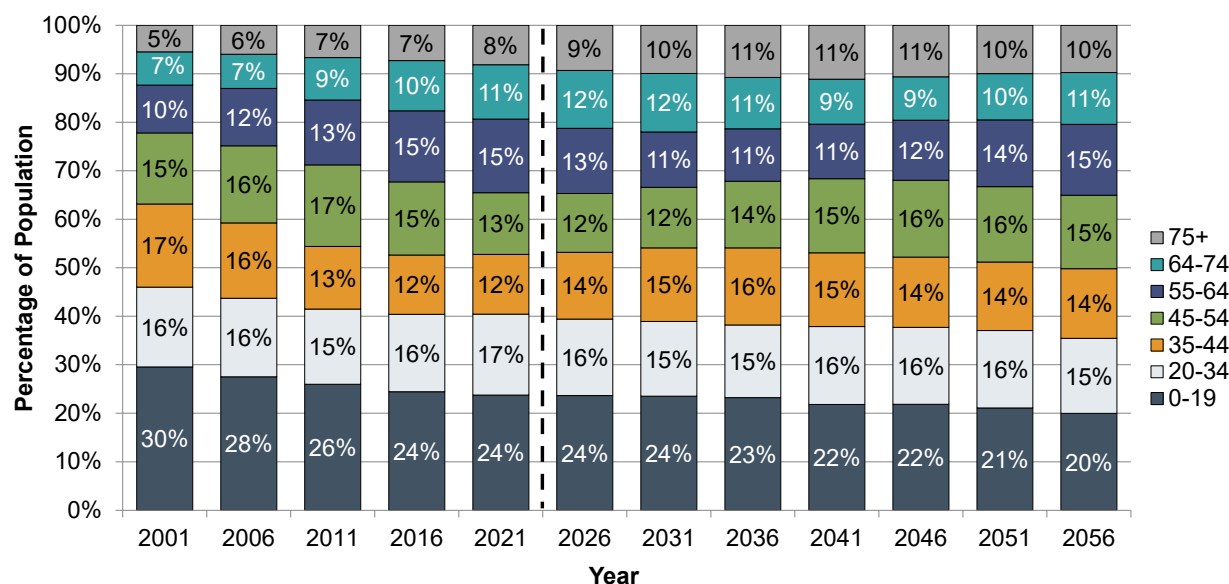
4.6.1 Forecast Population by Age Group

Figure 4-9 summarizes the Middlesex County population forecast by major age group over the 2001 to 2056 period. Over this time, the County's population is expected to steadily age. Most notably, the percentage of the population in the 75+ age group is projected to increase from 5% of the total population in 2001 to 10% by 2056. Similarly, the percentage share of population in the 65 to 74 age group is also forecast to steadily increase, rising from 7% in 2001 to 11% in 2056. This forecast population aging trend is anticipated to place downward pressure on the population and labour force growth



rate within the County over the long term. The aging of the County's population is also anticipated to place increasing demand on the need for seniors' housing, high-density rental and ownership housing as well as other attainable and affordable housing options. Please refer to Appendix B for additional details on population distribution by age group.

Figure 4-9
Middlesex County
Population by Age Group, 2001 to 2056



Note: Figures may not add precisely due to rounding. Population figures include a net Census undercount estimated at 4.6%.

Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; 2021 to 2056 forecast prepared by Watson & Associates Economists Ltd.

4.6.2 Trends in Housing Occupancy

Figure 4-10 summarizes anticipated trends in long-term housing occupancy, or average persons per unit (P.P.U.), for Middlesex County from 2021 to 2056. Key observations include the following:

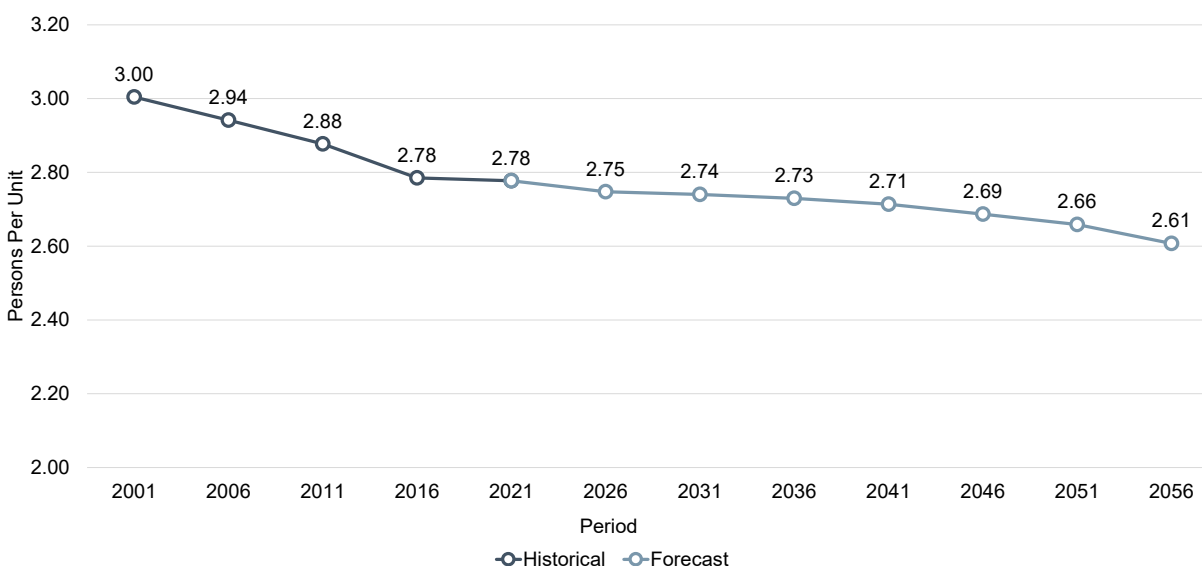
- Between 2001 and 2021, the average P.P.U. for Middlesex County declined from 3.00 to 2.78;
- Over the forecast period, the average P.P.U. for Middlesex County is anticipated to continue to gradually decline from 2.78 in 2021 to 2.61 in 2056, largely due to



the aging of the population combined with a gradual shift towards medium- and high-density housing forms; and

- Over time, the rate of P.P.U. decline is expected to moderate relative to historical trends, partially driven by stronger net migration levels attributed to working-age adults and their children.^[40]

Figure 4-10
Middlesex County
Persons Per Units, 2001 to 2056



Note: Population includes net Census undercount estimated at 4.6%.

Source: Historical population by age derived from 2001 to 2021 Statistics Canada Census data; 2021 to 2056 population forecast prepared by Watson & Associates Economists Ltd.

4.6.3 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). Between 2001 and 2021, the Middlesex County's total headship rate increased from 33% to 36% (refer to Appendix D for additional details). 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. While

^[40] It is noted that 2021 average P.P.U. levels may be temporarily inflated resulting from impacts associated with COVID-19.



major fluctuations in headship rates by age group are not common over time, the ratio of household maintainers per capita varies by population age group. For example, a municipality with a higher percentage of seniors (such as Middlesex 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 headship rates and average P.P.U. trends for Middlesex County, as previously discussed. It is important to note that headship rates by major age group are anticipated to remain relatively stable over the long-term forecast period.

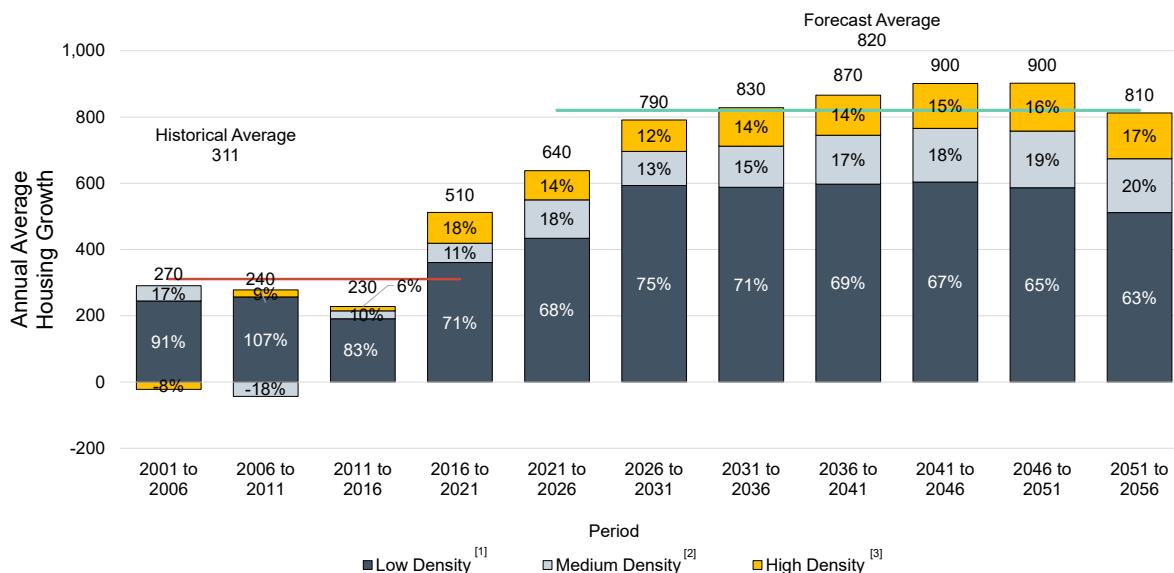
4.6.4 Housing Forecast by Structure Type

Figure 4-11 summarizes Middlesex County's recommended housing forecast by structure type (i.e., low density, medium density, and high density) over the 2021 to 2056 forecast period in five-year growth increments. Appendix E provides a summary of housing units that are currently active in development approvals, which has served as a guide in developing the near-term housing forecast by structure type. Key observations are as follows:

- The recommended forecast represents an increase to an average of approximately 820 housing units per year over the forecast period;
- Comparatively, this annual level of forecast housing growth is over 2.5 times the historical average of 311 units per year achieved during the previous 20-year period (2001 to 2021);
- Between 2001 and 2021, the share of medium- and high-density housing constructed across the County has steadily increased. Considering recent building trends, this shift toward higher-density residential development is expected to continue over the longer term;
- Over the forecast period, new residential development in Middlesex County is anticipated to shift towards of medium- and high-density housing forms. This shift in dwelling type preferences is expected to be driven largely by demographics (i.e., aging of the population), housing affordability, and increasing demand for rental housing when compared to the previous two decades; and.
- Over the 2021 to 2056 forecast period, new housing is expected to comprise 68% low-density units, 17% medium-density units, and 15% high-density units.



Figure 4-11
Middlesex County
Housing Forecast by Structure Type, 2001 to 2056



[1] Low Density includes singles and semi-detached houses.

[2] Medium Density includes townhouses and apartments in duplexes.

[3] High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures have been rounded and may not add up precisely.

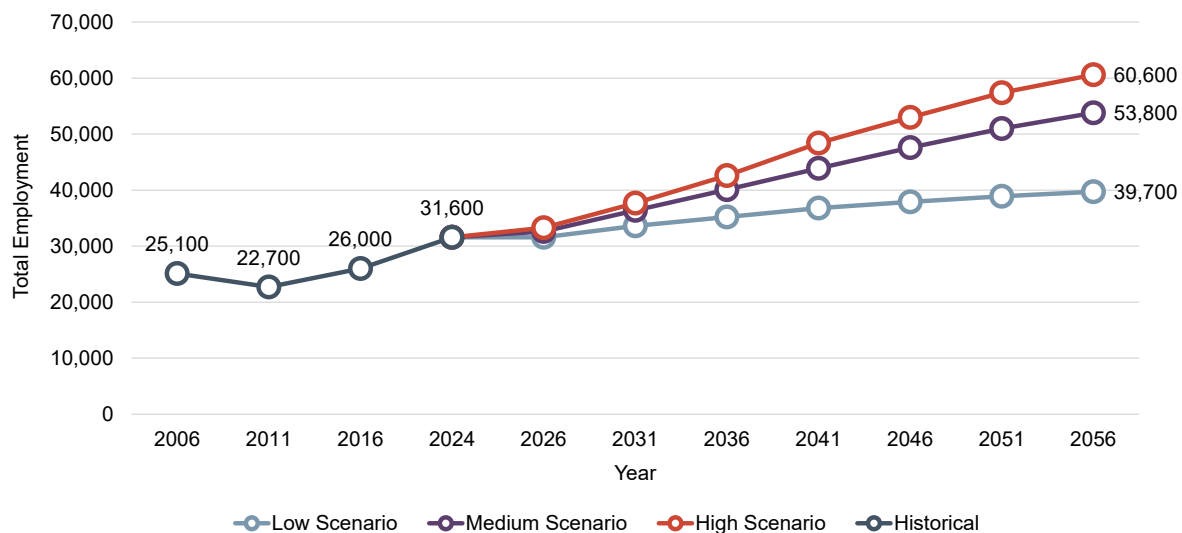
Source: Historical data derived from Statistics Canada Census profiles; forecast prepared by Watson & Associates Economists Ltd.

4.6.5 Long-Term Employment Growth, 2021 to 2056

Building on the population and housing growth scenarios as well as key macro and regional growth assumptions discussed throughout Chapter 3 and in section 4.2, a revised long-term employment growth forecast has been prepared for Middlesex County in comparison with recent historical trends. As summarized in Figure 4-12, by 2056, the employment base for Middlesex County is forecast to increase by a broad range between 8,100 to 29,000 employees, reaching 39,700 to 60,600 total jobs by 2056. Of the three long-term employment growth scenarios prepared for Middlesex County, the Medium (Reference) Employment Growth Scenario represents the most plausible long-term employment forecast for Middlesex County, considering our review of macro, regional, and local economic trends as well as the County's recommended long-term population growth forecast, as provided in section 4.6.



Figure 4-12
Middlesex County
Employment Forecast Comparison, 2006 to 2056



Scenarios	2024	2026	2031	2036	2041	2046	2051	2056
Low Employment Growth Scenario	31,600	31,600	33,600	35,200	36,800	37,900	38,900	39,700
Medium (Reference) Employment Growth Scenario	31,600	32,600	36,400	40,100	43,900	47,600	51,000	53,800
High Employment Growth Scenario	31,600	33,300	37,700	42,600	48,400	53,000	57,400	60,600

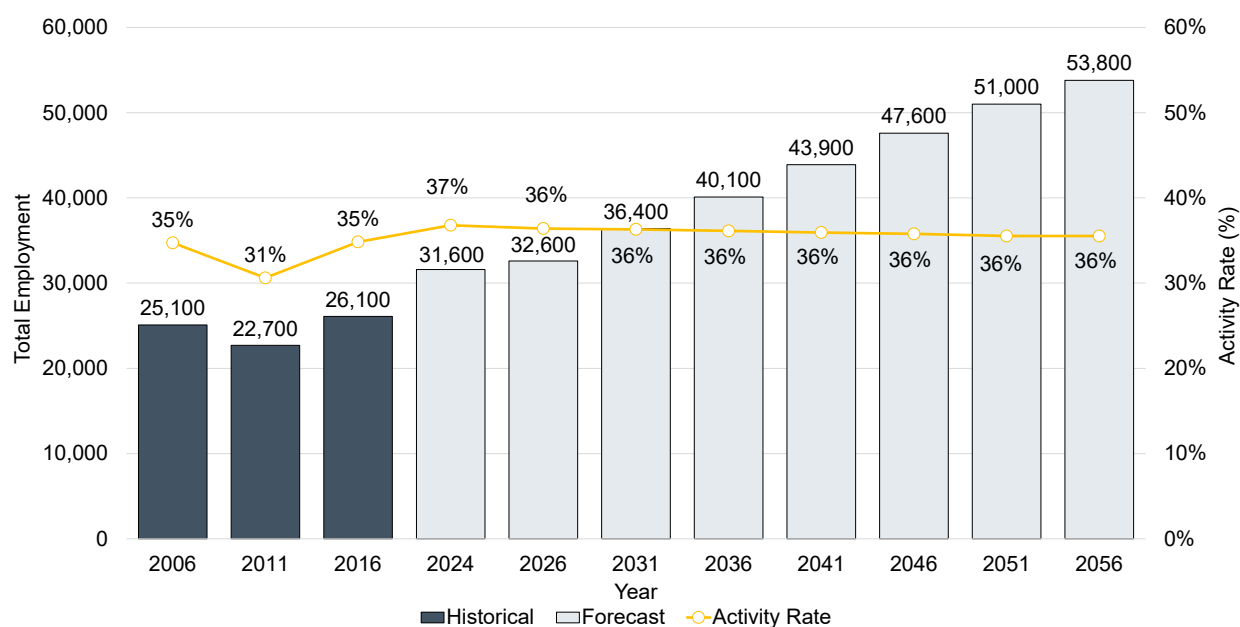
Note: Figures have been rounded. Total employment figures include work at home and no fixed place of work. Statistics Canada 2021 Census place of work employment data has been reviewed and has not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.

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



Figure 4-13 summarizes historical and forecast trends in the employment activity rate (ratio of jobs to population) for Middlesex County. Between 2006 and 2024, the employment activity rate for Middlesex County modestly increased from 35% to 37%. The County's employment activity rate is anticipated to remain relatively stable, decreasing slightly to 36% by 2056.

Figure 4-13
Middlesex County
Recommended Long-Term Employment Forecast, 2024 to 2056



Notes:

- Figures have been rounded.
- Activity rate uses population, adjusted to account for net Census undercount of approximately 4.6%.
- Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.

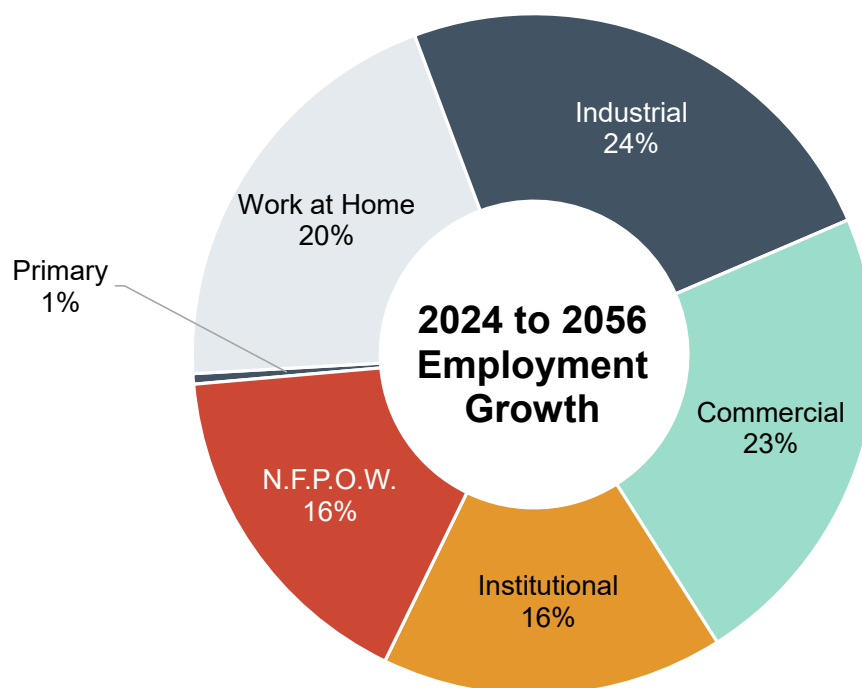
Source: 2006 to 2016 derived from Statistics Canada Census data; forecast prepared by Watson & Associates Economists Ltd.

Figure 4-14 provides further details regarding the Medium (Reference) Growth Scenario by place of work and major employment sector. Of the total additional jobs identified for Middlesex County over the long term, approximately 63% of jobs are anticipated to have a usual place of work, while the remaining 37% of new jobs are associated with work at home employment or off-site employees. With respect to employment by major



sector, approximately 39% of job growth for Middlesex County is associated with services-producing sectors, while 25% of jobs are associated with goods-producing sectors (i.e., industrial and primary employment sectors). Additional details regarding the long-term employment forecast for Middlesex County are provided in Appendix C.

Figure 4-14
Middlesex County
Total Employment Growth Forecast by Place of Work, 2024 to 2056



Note: Figures have been rounded and may not add precisely. N.F.P.O.W. means no fixed place of work.

Source: Watson & Associates Economists Ltd.



5. Middlesex County Population, Housing, and Employment Allocations by Area Municipality

Building on the County-wide forecasts provided in Chapter 4, population, housing, and employment allocations by Area Municipality were developed from the Medium-High Population Growth Scenario and the Medium Employment Growth Scenario. These allocations have been based on a detailed review of the following local supply and demand factors:

Local Supply Factors

- Supply of potential future housing stock in the development approvals process by housing structure type, approval status, and location.
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process.
- Supply of designated vacant Employment Area lands by Area Municipality.
- Provincial, County, and Area Municipal policy direction regarding forecast residential growth by Settlement Area and Rural Area.

Demand Factors

- Historical population, housing, and employment trends based on 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 by Area Municipality.
- A consideration of constraints to historical residential and non-residential development.
- Forecast population trends by major age group and associated household formation trends by age of household maintainer.
- Consideration of long-term propensity by housing tenure (i.e. ownership vs. rental housing) and influence on housing demand by structure type.
- Housing market demand by local municipality across all major demographic groups, including young adults, new families, move-up buyers, and empty nesters/seniors.



While population and employment growth rates vary significantly by geographic area, each of the Area Municipalities within the County share several common attributes with respect to near- and longer-term population growth and development trends. These include the following:

- For most Area Municipalities, the annual rate of population growth is anticipated to be comparable or higher relative to historical trends experienced over the past two decades.
- 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 higher housing development activity experienced across most areas of the County over the past several years, particularly between 2020 and 2022.
- Continued regional employment opportunities, particularly those related to the service sector, small-scale industrial occupations, and knowledge-based sectors, represent a key driver of future population growth within this area.
- Declining housing affordability, combined with a range of broader economic headwinds, including persistently high inflation rates and rising household debt, are anticipated to dampen housing demand (particularly ownership housing) in the near term (i.e., next 12 months), relative to recent historical highs experienced during the pandemic.
- Over the longer term (i.e., 10+ years), the average rate of annual housing development is anticipated to gradually slow (relative to the 2024 to 2034 forecast period) across all Area Municipalities within the County, driven by modestly slower regional and provincial economic growth associated with an aging population and regional labour force.
- Average P.P.U. levels are forecast to decline from 2021 to 2051; however, this rate of decline is anticipated to moderate over the long term.
- Future housing growth will continue to be dominated by low-density housing forms; however, increasing market demand will exist for medium- and high-density housing types.



5.1 Long-Term Population, Housing, and Employment Growth Forecast by Area Municipality

Provided below is a summary of the forecast population, housing, and employment growth trends for each of the Area Municipalities that compose Middlesex County. The Area Municipal population, housing, and employment forecasts are further summarized in Figure 5-1 through Figure 5-5, with additional details provided in Appendix F.

5.1.1 *Township of Adelaide-Metcalfe*

- As of 2021, the Township of Adelaide-Metcalfe has an existing population base that accounts for 4% of the County-wide population.
- The population within Adelaide-Metcalfe is anticipated to reach 4,700 people by 2056, accommodating approximately 2% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of Adelaide-Metcalfe is anticipated to grow at an annual rate of 1.2% per year over the next 30 years, which is much higher than the growth rate observed over the past 20-year Census period.
- To accommodate anticipated population growth, Adelaide-Metcalfe will require an average of 18 new dwellings to be constructed annually over the next 35 years.
- Over the 2021 to 2056 forecast period, all new housing is forecast to comprise low-density units (singles and semi-detached).
- The Township's employment base is anticipated to reach 2,600 jobs by 2056, accommodating approximately 5% of the County's employment growth over the forecast horizon under the Medium Employment Growth Scenario.
- The employment base of Adelaide-Metcalfe is anticipated to grow at an annual rate of 1.4%, which is much higher than the employment growth rate observed between 2006 and 2024.
- Employment opportunities exist across the service sector and, to a lesser extent, within the industrial sector. Forecast job growth is also anticipated to be accommodated through population-related jobs such as commercial, retail, and institutional employment.



5.1.2 Township of Lucan Biddulph

- The Township's existing population base, as of 2021, accounted for 7% of the County-wide residents, while the 2024 employment base accounted for 6% of the County-wide jobs.
- The population of Lucan Biddulph is anticipated to reach just under 11,000 people by 2056, accommodating approximately 7% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of Lucan Biddulph is anticipated to grow at an annual rate of 1.7% per year over the next 35 years, which is moderately higher than the growth rate observed over the past two decades.
- Over the next three decades, the Township is expected to add a little over 2,300 jobs, or 72 jobs per year. Most of the job growth is concentrated in population-related employment as a result of increased population growth in Lucan Biddulph.

5.1.3 Municipality of Middlesex Centre

- Middlesex Centre's existing population base, as of 2021, accounts for 24% of the County-wide residents. Similar to population, as of 2024, Middlesex Centre's employment base accounts for 24% of the County-wide jobs.
- The population of Middlesex Centre is anticipated to reach 42,800 by 2056, accommodating approximately 33% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of Middlesex Centre is anticipated to grow at an annual rate of 2.3% per year over the next 35 years, which is higher than the growth rate observed over the past two decades of 1.4% annually.
- To accommodate anticipated population growth, Middlesex Centre will require an average of 262 new dwellings to be constructed annually over the next 35 years. Of this total, approximately 65% of new housing development is anticipated to be characterized as low-density housing units (i.e., singles and semi-detached), 20% as high-density (i.e., townhouses), and the remaining 15% as high-density (i.e., apartments) housing units.
- Within Middlesex Centre, employment is largely concentrated in the service sector, including work at home and off-site employment. Strong employment growth is also anticipated in the industrial sector. The Municipality's employment



base is anticipated to reach approximately 13,900 jobs by 2056, accommodating approximately 29% of the County-wide employment growth over the forecast horizon under the Medium Employment Growth Scenario.

- The employment base of Middlesex Centre is anticipated to grow at an annual rate of 1.9%, which is slightly lower than the employment growth rate observed between 2006 and 2021, largely due to a small employment base.

5.1.4 Village of Newbury

- The Village of Newbury's existing population base, as of 2021, accounts for 1% of the County-wide residents. As of 2024, Newbury's employment base also accounts for 1% of County-wide jobs.
- The population of Newbury is anticipated to reach 800 persons by 2056, accommodating approximately 1% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of Newbury is anticipated to grow at an annual rate of 1.7% per year over the next 35 years, which is much higher than the growth rate observed over the most recent 20-year Census period.
- To accommodate anticipated population growth, the Village will average four new dwellings to be constructed annually over the next 35 years, the majority of which will be low-density housing units.
- Similar to population, Newbury has a relatively small employment base compared to the other municipalities in the County. Within Newbury, employment is largely concentrated in the service sector, including work at home and off-site employment. The Village's employment base is anticipated to reach just under 300 jobs by 2056, accommodating approximately 1% of the County-wide employment growth over the forecast horizon under the Medium Employment Growth Scenario.
- The employment base of Newbury is anticipated to grow at an annual rate of 1.8%, which is much higher than the employment growth rate observed between 2006 and 2024.



5.1.5 Municipality of North Middlesex

- As of 2021, the Municipality of North Middlesex has an existing population base that accounts for 8% of the County-wide population.
- The population within North Middlesex is anticipated to reach approximately 9,300 by 2056, accommodating approximately 4% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of North Middlesex is anticipated to grow at an annual rate of 1.0% over the next 35 years, which is considerably higher than the rate of growth observed over the past 20-year Census period.
- To accommodate anticipated permanent population growth, North Middlesex will require an average of 35 new dwellings to be constructed annually over the next 35 years. Over the 2021 to 2051 forecast period, new housing is anticipated to be primarily low-density housing (singles and semi-detached) accounting for 80% of the overall housing mix, 15% is forecast to be medium-density units (townhouses), and 5% is expected to be high-density units (apartments).
- The Municipality's employment base is anticipated to reach 3,400 jobs by 2056, accommodating approximately 4% of the County's employment growth over the forecast horizon under the Medium Employment Growth Scenario.
- The employment base of North Middlesex is anticipated to grow at an annual rate of 0.9%, which is slightly higher than the employment growth rate observed between 2006 and 2024. Approximately 45% of the employment growth is anticipated to be population related (i.e., retail services and education services).

5.1.6 Municipality of Southwest Middlesex

- As of 2021, the Municipality of Southwest Middlesex has an existing population base that accounts for 8% of the County-wide population. The population within Southwest Middlesex is anticipated to reach 8,200 by 2056, accommodating approximately 3% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of Southwest Middlesex is anticipated to grow at an annual rate of 0.8% per year over the next 35 years, which is much higher than the -0.2% growth rate observed over the past 20-year Census period.
- To accommodate anticipated population growth, Southwest Middlesex will require an average of 31 new dwellings to be constructed annually over the next



35 years. Over the 2021 to 2056 forecast period, new housing is forecast to comprise 64% low-density units (singles and semi-detached), 25% medium-density units (townhouses), and 11% high-density units (apartments, including secondary units).

- The Municipality's employment base is anticipated to reach 2,700 jobs by 2056, accommodating approximately 3% of the County's employment growth over the forecast horizon under the Medium Employment Growth Scenario.
- The employment base of Southwest Middlesex is anticipated to grow at an annual rate of 0.9%, which is much higher than the employment growth rate observed between 2006 and 2024.
- Employment opportunities exist across the service sector and, to a lesser extent, within the industrial sector. Forecast job growth is also anticipated to be accommodated through population-related jobs such as retail and education services.

5.1.7 Municipality of Strathroy-Caradoc

- The Municipality's existing population base, as of 2021, accounts for 31% of the County-wide residents. The population of Strathroy-Caradoc is anticipated to reach 47,300 by 2056, accommodating approximately 32% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of Strathroy-Caradoc is anticipated to grow at an annual rate of 1.8% over the next 35 years, which is much higher than the 1.1% annual growth rate observed over the most recent 20-year Census period.
- To accommodate anticipated population growth, Strathroy-Caradoc will require an average of 273 new dwellings to be constructed annually over the next 35 years. Of this total, approximately 62% are anticipated to be low-density units, 18% medium-density units, and the remaining 20% are forecast to be accommodated through high-density development. A steady increase in the share of higher-density housing forms is anticipated, largely driven by housing needs associated with the 65+ age group (including seniors' housing) and, to a lesser extent, younger adults.
- As of 2024, the Municipality of Strathroy-Caradoc accounted for 31% of the County's total employment. Within Strathroy-Caradoc, employment is largely concentrated in the service sector, including work at home and off-site employment. Over the next three decades, Strathroy-Caradoc is anticipated to



account for 27% of County-wide employment growth. Most of the employment growth is anticipated to be population related (i.e., retail services and education services).

- Strathroy-Caradoc's employment base is anticipated to grow at an annual rate of 1.5%, which represents approximately 190 new jobs per year over the next 32 years.

5.1.8 Municipality of Thames Centre

- The Municipality's existing population base, as of 2021, accounts for 18% of the County-wide residents. The population of Thames Centre is anticipated to reach 27,000 by 2056, accommodating approximately 18% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- The population of Thames Centre is anticipated to grow at an annual rate of 1.8% per year over the next 35 years, which is much higher than the growth rate observed over the most recent 20-year Census period.
- To accommodate anticipated permanent population growth, Thames Centre will require an average of 138 new dwellings to be constructed annually over the next 35 years. Of this total, approximately 80% are anticipated to be low-density units, 15% medium-density units, and the remaining 5% are forecast to be accommodated through high-density development.
- As of 2024, the Municipality of Thames Centre accounted for 19% of the County's total employment. Within Thames Centre, employment is largely concentrated in the service sector, including work at home and off-site employment. Over the next 32 years, Thames Centre is anticipated to account for 22% of County-wide employment growth. Most of the employment growth is anticipated to be population related (i.e., retail services and education services).



Figure 5-1
Middlesex County
Population Forecast by Area Municipality, 2021 to 2056

Year	Township of Adelaide- Metcalfé	Township of Lucan Biddulph	Municipality of Middlesex Centre	Village of Newbury	Municipality of North Middlesex	Municipality of Southwest Middlesex	Municipality of Strathroy- Caradoc	Municipality of Thames Centre	Middlesex County
2001	3,300	4,400	14,900	400	7,200	6,400	20,000	13,000	69,700
2006	3,300	4,400	16,300	500	7,000	6,200	20,900	13,700	72,200
2011	3,200	4,500	17,200	500	7,000	6,100	21,900	13,600	74,000
2016	3,100	4,900	18,000	500	6,600	6,000	21,800	13,800	74,800
2021	3,100	5,900	19,800	500	6,600	6,200	25,000	14,600	81,700
2036	3,600	8,700	30,100	600	7,600	6,900	34,400	19,200	111,100
2046	4,200	9,900	37,500	700	8,500	7,600	41,200	23,400	133,100
2056	4,700	10,900	43,400	800	9,300	8,200	47,300	27,000	151,500
Total Population Growth									
2001 to 2021	-200	1,500	4,900	100	-600	-200	5,000	1,600	12,000
2021 to 2036	500	2,800	10,300	100	1,000	700	9,400	4,600	29,400
2021 to 2046	1,100	4,000	17,700	200	1,900	1,400	16,200	8,800	51,400
2021 to 2056	1,600	5,000	23,600	300	2,700	2,000	22,300	12,400	69,800
Annual Population Growth Rate									
2001 to 2021	-0.2%	1.5%	1.4%	0.2%	-0.4%	-0.2%	1.1%	0.6%	0.8%
2021 to 2036	0.9%	2.6%	2.8%	2.1%	0.9%	0.7%	2.2%	1.8%	2.1%
2021 to 2046	1.2%	2.1%	2.6%	1.9%	1.0%	0.8%	2.0%	1.9%	2.0%
2021 to 2056	1.1%	1.7%	2.3%	1.7%	1.0%	0.8%	1.8%	1.8%	1.8%

Note: Population includes net Census undercount estimated at approximately 4.6%. Figures may not add precisely due to rounding.
Source: 2001 to 2021 derived from Statistics Canada Census data; 2021 to 2056 forecast by Watson & Associates Economists Ltd.



Figure 5-2
Middlesex County
Housing Forecast by Area Municipality, 2021 to 2056

Year	Township of Adelaide- Metcalfé	Township of Lucan Biddulph	Municipality of Middlesex Centre	Village of Newbury	Municipality of North Middlesex	Municipality of Southwest Middlesex	Municipality of Strathroy- Caradoc	Municipality of Thames Centre	Middlesex County
2001	1,000	1,400	4,700	200	2,300	2,200	7,000	4,300	23,200
2006	1,000	1,500	5,200	200	2,300	2,300	7,500	4,600	24,500
2011	1,000	1,600	5,700	200	2,300	2,400	8,000	4,700	25,700
2016	1,000	1,800	6,000	200	2,300	2,400	8,300	4,900	26,900
2021	1,000	2,100	6,700	200	2,400	2,400	9,500	5,200	29,400
2036	1,200	3,200	10,400	300	2,800	2,800	13,200	6,900	40,700
2046	1,400	3,700	13,200	300	3,200	3,100	16,000	8,500	49,500
2056	1,700	4,200	15,900	300	3,600	3,500	19,000	10,000	58,100
Total Housing Growth									
2001 to 2021	0	700	2,000	0	100	200	2,500	900	6,200
2021 to 2036	200	1,100	3,700	100	400	400	3,700	1,700	11,300
2021 to 2046	400	1,600	6,500	100	800	700	6,500	3,300	20,100
2021 to 2056	700	2,100	9,200	100	1,200	1,100	9,500	4,800	28,700
Annual Housing Growth Rate									
2001 to 2021	0.0%	2.0%	1.8%	1.2%	0.1%	0.4%	1.5%	0.9%	1.2%
2021 to 2036	1.2%	2.8%	3.0%	1.9%	1.2%	0.9%	2.2%	2.0%	2.2%
2021 to 2046	1.4%	2.3%	2.8%	1.9%	1.2%	0.8%	2.1%	2.0%	2.1%
2021 to 2056	1.4%	2.0%	2.5%	1.7%	1.0%	0.8%	2.0%	1.8%	2.0%

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2021 to 2056 forecast by Watson & Associates Economists Ltd.



Figure 5-3
Middlesex County
Employment Forecast by Area Municipality, 2024 to 2056

Year	Township of Adelaide- Metcalf	Township of Lucan Biddulph	Municipality of Middlesex Centre	Village of Newbury	Municipality of North Middlesex	Municipality of Southwest Middlesex	Municipality of Strathroy- Caradoc	Municipality of Thames Centre	Middlesex County
2006	1,500	1,200	5,000	300	2,200	2,100	8,400	4,300	25,100
2011	1,000	1,200	4,500	100	1,800	1,800	8,200	3,900	22,700
2016	1,300	1,300	5,700	300	2,200	1,700	8,900	4,700	26,000
2024	1,700	2,000	7,500	200	2,500	2,000	9,800	5,900	31,600
2036	2,000	2,800	10,300	200	2,800	2,300	12,200	7,600	40,100
2046	2,300	3,600	12,400	300	3,100	2,500	14,100	9,200	47,600
2056	2,600	4,300	13,800	300	3,400	2,700	15,800	10,800	53,800
Total Employment Growth									
2006 to 2024	200	800	2,500	-100	300	-100	1,400	1,600	6,500
2024 to 2036	300	800	2,800	0	300	300	2,400	1,700	8,500
2024 to 2046	600	1,600	4,900	100	600	500	4,300	3,300	16,000
2024 to 2056	900	2,300	6,300	100	900	700	6,000	4,900	22,200
Annual Employment Growth Rate									
2006 to 2024	0.6%	2.7%	2.3%	-3.8%	0.8%	-0.1%	0.9%	1.8%	1.3%
2024 to 2036	1.5%	2.8%	2.7%	2.2%	0.9%	0.9%	1.8%	2.0%	2.0%
2024 to 2046	1.5%	2.7%	2.3%	1.9%	1.0%	1.0%	1.7%	2.0%	1.9%
2024 to 2056	1.4%	2.4%	1.9%	1.8%	0.9%	0.9%	1.5%	1.9%	1.7%

Note: Figures may not add precisely due to rounding.

Source: 2006 to 2016 derived from Statistics Canada Census data; 2024 to 2056 forecast by Watson & Associates Economists Ltd.



Figure 5-4
Middlesex County
Percentage Permanent Population Forecast by Area Municipality, 2021 to 2056

Area Municipality	2021 Population (%)	Percent of 2021-2056 Population Growth	2056 Population (%)
Township of Adelaide-Metcalfe	4%	2%	3%
Township of Lucan Biddulph	7%	7%	7%
Municipality of Middlesex Centre	24%	34%	29%
Village of Newbury	1%	1%	1%
Municipality of North Middlesex	8%	4%	6%
Municipality of Southwest Middlesex	8%	3%	5%
Municipality of Strathroy-Caradoc	31%	32%	31%
Municipality of Thames Centre	18%	18%	18%
Middlesex County	100%	100%	100%

Note: Figures may not add precisely due to rounding. Population includes a net Census undercount estimated at approximately 4.6%.

Source: 2021 derived from Statistics Canada Census data; 2021 to 2056 forecast by Watson & Associates Economists Ltd.



Figure 5-5
Middlesex County
Percentage Employment Forecast by Area Municipality, 2024 to 2056

Area Municipality	2024 Employment (%)	Percent of 2024-2056 Employment Growth	2056 Employment (%)
Township of Adelaide-Metcalfe	5%	4%	5%
Township of Lucan Biddulph	6%	10%	8%
Municipality of Middlesex Centre	24%	29%	26%
Village of Newbury	1%	1%	1%
Municipality of North Middlesex	8%	4%	6%
Municipality of Southwest Middlesex	6%	3%	5%
Municipality of Strathroy-Caradoc	31%	27%	29%
Municipality of Thames Centre	19%	22%	20%
Middlesex County	100%	100%	100%

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



6. Conclusions

This study provides a comprehensive assessment of Middlesex County's long-term population, housing, and employment growth to the year 2056, within the context of regional economic conditions, forecast growth drivers and disruptors, as well as County-wide and local development trends. The key findings of the Middlesex County Growth Analysis are summarized below.

1. The Long-Term Population and Economic Growth Outlook for Middlesex County is Very Positive

As discussed in Chapters 3 and 4, herein, Middlesex County is well positioned to continue to attract and accommodate steady population and employment growth over the next three decades. A key driver of this long-term population and employment growth potential is the County's geographic proximity to the City of London combined with its strategic location (to varying degrees) to the Highway 401 and 402 corridors.

The population for Middlesex County showed considerable growth between 2016 and 2024, primarily driven by outward growth pressures from the City of London and the larger urban centres of the G.G.H. With the onset of the COVID-19 pandemic, housing demand accelerated in Middlesex County and more broadly across Southwestern Ontario, led by eroding housing affordability in the G.G.H., increased opportunities for hybrid/remote work, combined with growing employment growth opportunities within the London E.R. While the latest Fall 2024 population projections from the M.O.F. show a slight decrease in the population projections for Southwestern Ontario compared to the Summer 2023 projections, Middlesex County's projections continue to exhibit strong population growth.

Middlesex 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 with proximity to employment as well as other urban amenities. These amenities include public and private schools, post-secondary institutions, regional hospitals, access to urban indoor and outdoor municipal recreational facilities, and proximity to recreational opportunities throughout the County's rural countryside.

Over the next 35 years, Middlesex County is forecast to grow at an annual rate of 1.8%, which is considerably higher than what has been experienced over the past two



decades. The County is expected to add approximately 69,800 people over the next 35 years, or a little under 2,000 new residents per year.

2. While the County's Population is Steadily Growing, it is also Getting Older

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 the aging local population. In 2001, the seniors' population (i.e., 65 years and older) in Middlesex County represented approximately 12% of the total population base. By 2021, the County's 65+ population share had grown significantly to 19%, which is comparable to the province as a whole (19%). By 2031, the share of population aged 65+ is forecast to peak at 22% of the County population base and remain close to this level for the remainder of the long-term forecast period. These anticipated demographic trends within the County will be largely driven by the aging of the existing Baby Boom population, and to a lesser extent, succeeding generations (i.e., Generation X and Millennials), as opposed to net migration of new seniors.

This aging trend places increasing demands on net migration as a source for population growth in the County, due to declining (and eventually negative) population growth from natural increase, i.e., births less deaths. The aging of the County's population is also anticipated to generate increasing needs for seniors' housing and other housing options to accommodate a growing share of older residents. Furthermore, an older population base can also place downward pressure on the labour force participation rate^[41], which can potentially constrain long-term economic growth within the local and regional economy.

Over the long-term forecast period, approximately 90% of the new residents that are expected to arrive in the County are projected to be adults between the ages of 20 and 54 as well as children (i.e., under 19 years of age). These forecast net migration trends for Middlesex County are expected to significantly mitigate the impacts of the County's aging population base.

^[41] Defined by Statistics Canada as the proportion of the population aged 15 and older who are employed or looking for work.

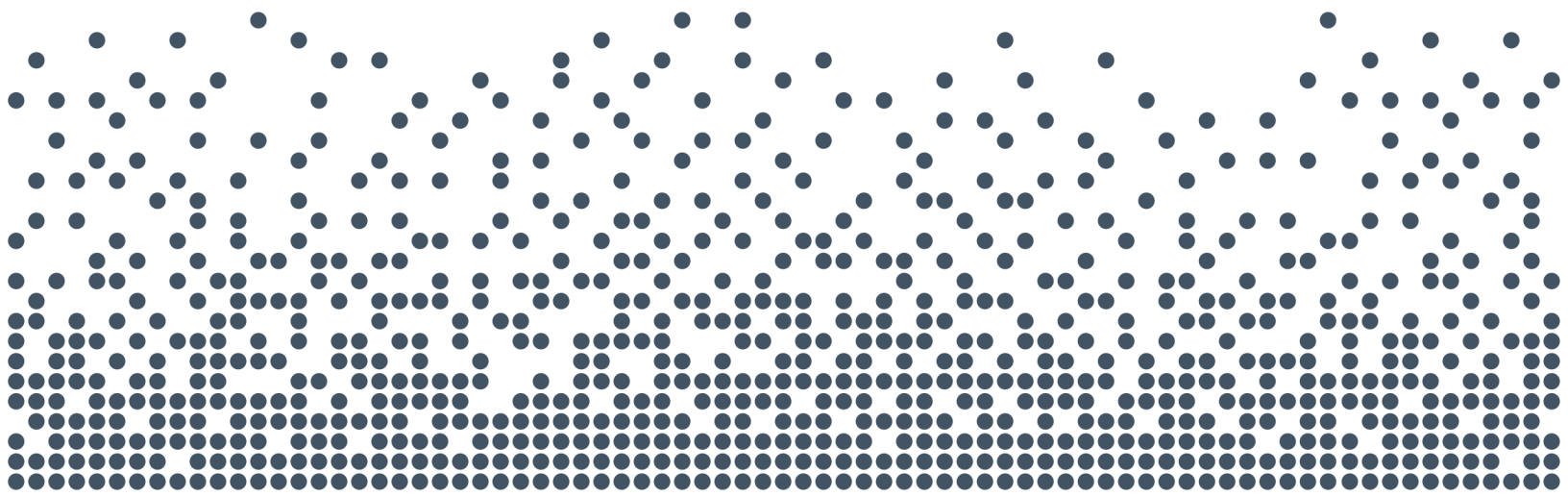


3. A Broad Range of Housing Types are Anticipated to Accommodate Continued Permanent Population Growth Across the County

To accommodate the recommended long-term permanent population growth scenario, the County will require the construction of approximately 28,700 new housing units over the 2021 to 2056 planning horizon. This represents an average of approximately 820 new housing units annually.

A fundamental planning policy objective at the provincial, County, and local level is to plan for complete communities which offer a broad range of housing options as well as a diverse mix of local employment opportunities. This is important because it is recognized that the County has a role to play in attracting, growing and retaining local businesses by providing housing options to a growing regional labour force base.

Accordingly, there will continue to be a growing need to attract and accommodate new and existing residents within County across all ages at all income groups, including young adults, new families, growing families with children, empty nesters and seniors. To achieve this objective, Middlesex County, working with its Area Municipalities and stakeholders will be required to provide a broad range of ownership and rental housing products across all housing types, including, but not limited to, grade-related ownership housing (i.e., single detached, townhouses), condominium apartments, purpose-built rental housing, seniors' housing and secondary units). Resident attraction efforts must be linked to not only housing accommodation but also infrastructure, community services, urban amenities, and quality of life attributes that appeal to the younger mobile population, while not detracting from the County's attractiveness to older population segments.



Appendices



Appendix A

Growth Projections

Approach/Methodology



Appendix A: Growth Projections Approach/Methodology

Approach and Methodology

The population, household, and employment forecast methodology adopted for this study utilizes a combined forecasting approach that incorporates both the traditional “top-down” cohort-survival forecast methodology (i.e., population by age-cohort) and a “bottom-up” household formation methodology. This combined approach is adopted to ensure that both regional economic/demographic trends and local housing market conditions are adequately assessed in developing the long-term growth potential for Middlesex County and its Area Municipalities.

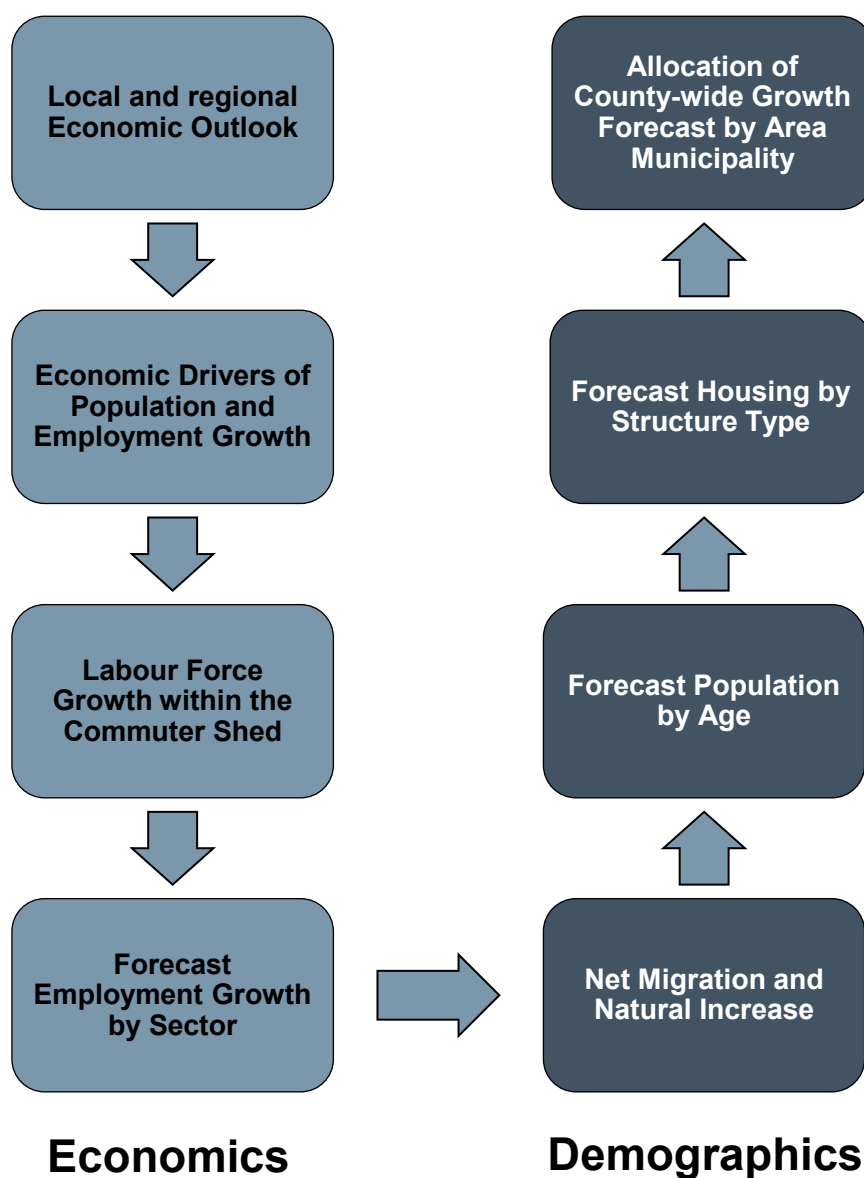
A.1 Economic Base Model

Local/regional economic activities can be divided into two categories: those that are “export-based,” and those that are “community-based.” The export-based sector comprises industries (i.e., economic clusters) that produce goods that reach markets outside the community (e.g., agriculture and primary resources, manufacturing, research and development). Export-based industries also provide services to temporary and second-home residents of Middlesex County (hotels, restaurants, tourism-related sectors, colleges, and universities) or to businesses outside the region (specialized financial and professional, scientific and technical services). Community-based industries produce services that primarily meet the needs of the residents in the County (retail, medical, primary and secondary education, and personal and government services). Ultimately, future permanent population and housing growth within Middlesex County has been determined in large measure by the competitiveness of the export-based economy within the County and the surrounding market area.

On the other hand, population growth in the 65+ cohort will continue to be largely driven by the aging of the County’s existing population and, to a lesser extent, the attractiveness of the County to older adults and seniors through net migration. The approach is illustrated schematically in Figure A-1.



Figure A-1
Population and Household Projection Model



A.2 Cohort-Survival Population and Household Forecast Methodology

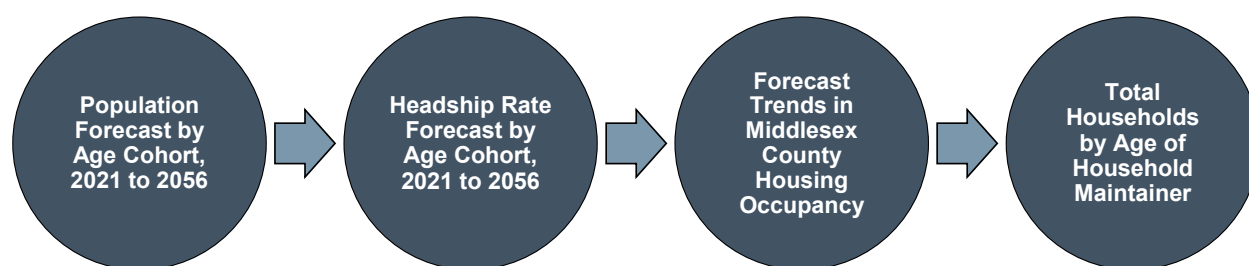
The cohort-survival population forecast methodology uses as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (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. Total housing growth is generated from the population forecast by major age group using a headship rate forecast.

A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e., cohort). Average headship rates do not tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e., 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as Middlesex County's population ages, the ratio of household maintainers is anticipated to increase. The average headship rate represents the inverse of the average number of persons per unit (P.P.U.). As such, as the County's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants increases. Figure A-2 summarizes the cohort-survival forecast methodology, which is a provincially accepted approach to projecting population and corresponding total household formation.^[42]

Figure A-2
Cohort-Survival Population and Household Forecast Methodology



This forecasting approach has been developed with consideration to the provincial Projection Methodology Guideline^[43] and industry best practices. This approach focuses on the rate of historical housing construction in Middlesex County and the surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, housing units in the development process, and

^[42] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.

^[43] Ibid.



historical housing demand. Population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in P.P.U. over time within existing households.

A.3 Employment Forecast

The long-term employment growth potential for Middlesex County has been developed from the labour force growth forecast, which considers both the rate and age structure of forecast labour-force growth over the 2021 to 2056 planning horizon. A long-term employment growth forecast by major employment sector/category (i.e., primary, industrial, commercial, institutional, work at home) was then established using the employment “activity rate” method.^[44]

When forecasting long-term employment, it is important to understand how employment growth in Middlesex County by major employment category (i.e., industrial, commercial, and institutional) is impacted by forecast labour-force and population growth.

Population-related employment (i.e., retail, schools, services, 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 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.^[45]

Industrial and office commercial employment (export-based employment), on the other hand, is not closely linked to population growth and tends to be more influenced by broader market conditions. This includes, but is not limited to, economic competitiveness, transportation access, access to labour, and distance to employment

^[44] An employment activity rate is defined as the number of jobs in a municipality divided by the number of residents.

^[45] Due to further advancements in telecommunications technology, it is anticipated that home-based employment activity rates may increase over the forecast period for the County.



markets) and local site characteristics.^[46] As such, industrial employment (employment land employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

- Macro-economic trends influencing industrial and employment land development (i.e., industrial employment) within Middlesex County and the surrounding market area);
- Historical employment trends (i.e., review of established and emerging employment clusters), non-residential construction activity, and recent employment land absorption rates; and
- Availability of serviced industrial and employment land supply (i.e., shovel-ready industrial and employment land) and future planned greenfield development opportunities on vacant designated industrial and employment lands within Middlesex County and the surrounding market area.

^[46] Local site characteristics include, but are not limited to, servicing capacity, highway access and exposure, site size/configuration, physical conditions, and site location within existing and future industrial lands and Employment Areas throughout Middlesex County and the surrounding market area.



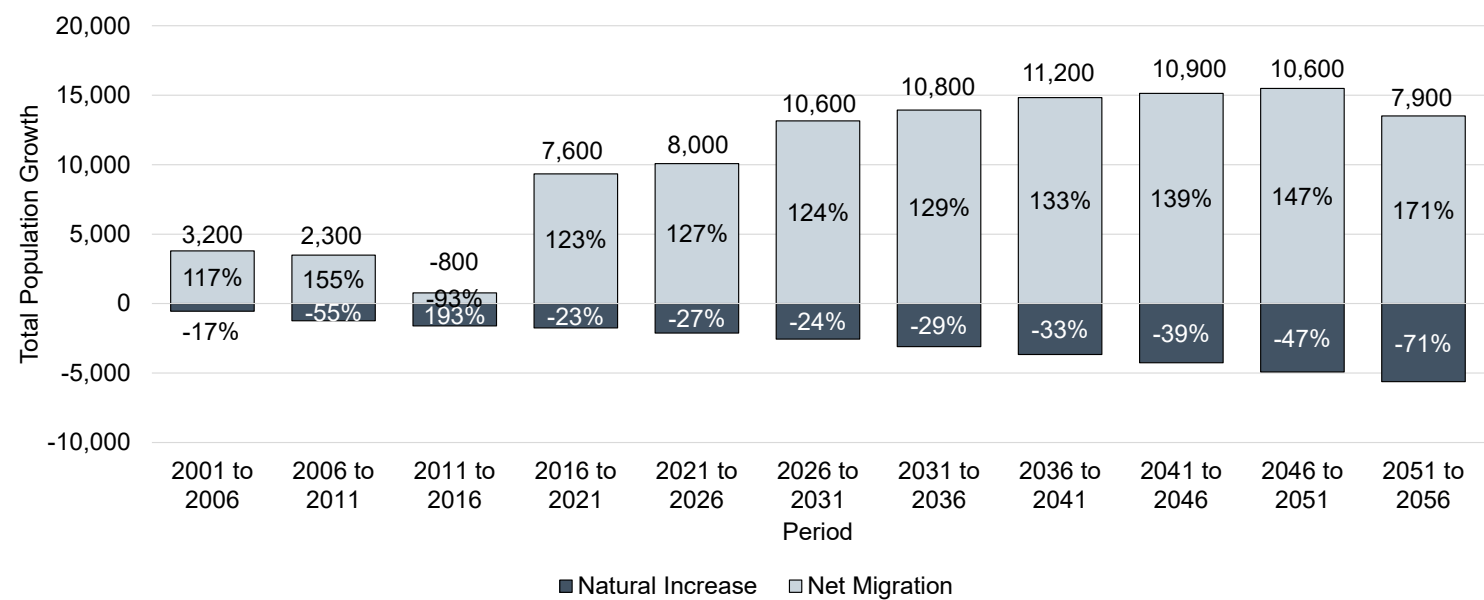
Appendix B

Components of Population Growth



Appendix B: Components of Population Growth

Figure B-1
Middlesex County
Components of Population Growth, 2001 to 2051



Component	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056
Natural Increase	-600	-1,200	-1,600	-1,800	-2,100	-2,600	-3,100	-3,700	-4,300	-5,000	-5,600
Net Migration	3,800	3,500	800	9,300	10,100	13,200	13,900	14,800	15,100	15,500	13,500
Population Growth	3,200	2,300	-800	7,600	8,000	10,600	10,800	11,200	10,900	10,600	7,900

Note: Figures have been rounded and may not add up precisely. Population figures include a net Census undercount.
Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-2
Middlesex County
Net Migration by Age Cohort, 2001 to 2056

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056
0-19	860	3,620	3,240	4,710	4,940	5,960	6,350	6,600	7,470	7,120	6,460
20-34	710	-1,720	-1,910	900	1,370	2,940	2,580	2,560	2,010	1,980	1,560
35-44	570	660	830	1,860	1,980	2,230	2,800	3,130	3,350	3,530	3,040
45-54	640	200	-220	740	790	1,010	1,210	1,340	1,050	1,400	1,200
55-74	770	570	-720	1,150	1,010	1,010	1,000	1,190	1,250	1,450	1,250
75+	250	160	-450	-	-	-	-	-	-	-	-
Total	3,800	3,500	800	9,400	10,100	13,200	13,900	14,800	15,100	15,500	13,500

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-3
Middlesex County
Share of Net Migration by Age Cohort, 2001 to 2056

Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056
0-19	23%	104%	419%	50%	49%	45%	46%	45%	49%	46%	48%
20-34	19%	-49%	-247%	10%	14%	22%	18%	17%	13%	13%	12%
35-44	15%	19%	107%	20%	20%	17%	20%	21%	22%	23%	22%
45-54	17%	6%	-29%	8%	8%	8%	9%	9%	7%	9%	9%
55-74	20%	16%	-93%	12%	10%	8%	7%	8%	8%	9%	9%
75+	6%	5%	-58%	0%	0%	0%	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-4
Middlesex County
Population by Age Cohort, 2001 to 2056

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056
0-19	20,500	20,000	19,500	18,100	19,400	21,200	23,600	25,800	26,700	29,100	29,900	29,700
20-34	11,400	11,800	11,600	11,800	13,600	14,100	15,400	16,700	19,600	21,100	23,100	23,500
35-44	11,900	11,300	9,700	9,100	10,100	12,300	15,200	17,700	18,600	19,300	20,500	22,000
45-54	10,200	11,500	12,600	11,200	10,400	10,900	12,500	15,200	18,700	21,100	22,400	23,100
55-74	11,600	13,700	16,600	18,500	21,500	22,700	23,500	23,800	25,100	28,400	33,500	38,500
75+	3,800	4,300	5,000	5,400	6,600	8,300	10,000	11,900	13,600	14,100	14,300	14,800
Total	69,400	72,600	75,000	74,100	81,600	89,500	100,200	111,100	122,300	133,100	143,700	151,600

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-5
Middlesex County
Share of Population by Age Cohort, 2001 to 2056

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056
0-19	30%	28%	26%	24%	24%	24%	24%	23%	22%	22%	21%	20%
20-34	16%	16%	15%	16%	17%	16%	15%	15%	16%	16%	16%	16%
35-44	17%	16%	13%	12%	12%	14%	15%	16%	15%	15%	14%	15%
45-54	15%	16%	17%	15%	13%	12%	12%	14%	15%	16%	16%	15%
55-74	17%	19%	22%	25%	26%	25%	23%	21%	21%	21%	23%	25%
75+	5%	6%	7%	7%	8%	9%	10%	11%	11%	11%	10%	10%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Appendix C

County-wide Population, Housing, and Employment Growth



Appendix C: County-wide Population, Housing, and Employment Forecast Growth

Figure C-1
Middlesex County
Population and Housing Summary

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2006	72,200	69,000	1,300	67,700	22,000	760	1,520	270	24,550	2.94	2.81
	Mid-2011	74,000	70,800	1,400	69,400	23,250	550	1,620	310	25,720	2.88	2.75
	Mid-2016	74,800	71,600	1,200	70,300	24,160	670	1,690	350	26,860	2.78	2.66
	Mid-2021	81,700	78,100	1,100	77,100	25,890	960	2,150	430	29,420	2.78	2.65
Forecast	Mid-2026	89,600	85,700	1,200	84,600	28,060	1,530	2,590	430	32,610	2.75	2.63
	Mid-2031	100,200	95,900	1,300	94,600	31,030	2,050	3,060	430	36,570	2.74	2.62
	Mid-2036	111,100	106,200	1,400	104,800	33,970	2,670	3,640	430	40,710	2.73	2.61
	Mid-2041	122,200	116,900	1,600	115,300	36,950	3,410	4,250	430	45,040	2.71	2.60
	Mid-2046	133,100	127,300	1,700	125,600	39,970	4,220	4,930	430	49,540	2.69	2.57
	Mid-2051	143,700	137,400	1,800	135,600	42,900	5,070	5,650	430	54,050	2.66	2.54
	Mid-2056	151,500	144,900	1,900	143,000	45,460	5,890	6,340	430	58,110	2.61	2.49
Incremental	Mid-2006 to Mid-2011	1,800	1,800	100	1,700	1,250	-210	100	40	1,170	-	-
	Mid-2011 to Mid-2016	800	800	-200	900	910	120	70	40	1,140	-	-
	Mid-2016 to Mid-2021	6,900	6,500	-100	6,800	1,730	290	460	80	2,560	-	-
	Mid-2021 to Mid-2026	8,000	7,600	100	7,520	2,170	570	440	0	3,190	-	-
	Mid-2021 to Mid-2031	18,600	17,800	200	17,500	5,140	1,090	910	0	7,150	-	-
	Mid-2021 to Mid-2036	29,400	28,100	300	27,700	8,080	1,710	1,490	0	11,290	-	-
	Mid-2021 to Mid-2041	40,600	38,800	500	38,300	11,060	2,450	2,100	0	15,620	-	-
	Mid-2021 to Mid-2046	51,400	49,200	600	48,500	14,080	3,260	2,780	0	20,120	-	-
	Mid-2021 to Mid-2051	62,000	59,300	700	58,500	17,010	4,110	3,500	0	24,630	-	-
	Mid-2021 to Mid-2056	69,900	66,800	900	65,900	19,570	4,930	4,190	0	28,690	-	-



Notes associated with Figure C-1:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding. Figures exclude the City of London.

Source: 2006 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure C-2
Middlesex County
Employment Summary (Activity Rates)

	Population (including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. ^[2]	Total Employment
Mid-2006	72,200	0.30%	6.88%	2.83%	7.96%	3.38%	3.38%	24.74%
Mid-2011	74,000	1.63%	6.17%	7.49%	7.80%	2.24%	2.24%	27.59%
Mid-2016	74,800	2.22%	5.82%	8.46%	8.51%	4.22%	4.22%	33.46%
Mid-2024	86,000	2.03%	5.89%	8.38%	9.19%	6.31%	4.99%	36.79%
Mid-2026	89,600	1.96%	5.90%	8.35%	9.00%	6.22%	4.95%	36.38%
Mid-2031	100,200	1.78%	6.00%	8.35%	9.00%	6.14%	5.03%	36.30%
Mid-2036	111,100	1.63%	6.10%	8.35%	8.91%	6.08%	5.08%	36.15%
Mid-2041	122,200	1.50%	6.19%	8.37%	8.80%	6.00%	5.08%	35.93%
Mid-2046	133,100	1.39%	6.26%	8.33%	8.73%	5.95%	5.12%	35.77%
Mid-2051	143,700	1.29%	6.28%	8.28%	8.60%	5.93%	5.16%	35.53%
Mid-2056	151,500	1.23%	6.30%	8.30%	8.50%	5.95%	5.23%	35.51%
Total Incremental								
2006-2011	1,800	1.34%	-0.71%	4.66%	-0.17%	-1.14%	-1.14%	2.86%
2011-2016	800	0.58%	-0.35%	0.97%	0.71%	1.98%	1.98%	5.87%
2016-2024	11,200	-0.19%	0.07%	-0.08%	0.68%	2.09%	0.76%	3.33%
2024-2026	3,600	-0.07%	0.01%	-0.03%	-0.19%	-0.09%	-0.04%	-0.41%
2024-2031	14,200	-0.25%	0.11%	-0.03%	-0.19%	-0.17%	0.04%	-0.50%
2024-2036	25,100	-0.40%	0.21%	-0.03%	-0.28%	-0.23%	0.09%	-0.64%
2024-2041	36,200	-0.53%	0.30%	-0.01%	-0.39%	-0.31%	0.09%	-0.86%
2024-2046	47,100	-0.64%	0.37%	-0.05%	-0.46%	-0.37%	0.14%	-1.02%
2024-2051	57,700	-0.74%	0.38%	-0.10%	-0.59%	-0.39%	0.17%	-1.26%
2024-2056	65,500	-0.80%	0.41%	-0.08%	-0.69%	-0.36%	0.24%	-1.28%
Annual Average Incremental								
2006-2011	360	0.27%	-0.14%	0.93%	-0.03%	-0.23%	-0.23%	0.57%
2011-2016	160	0.12%	-0.07%	0.19%	0.14%	0.40%	0.40%	1.17%
2016-2024	1,400	-0.04%	0.01%	-0.02%	0.14%	0.42%	0.15%	0.67%
2024-2026	1,800	-0.03%	0.00%	-0.02%	-0.09%	-0.05%	-0.02%	-0.21%
2024-2031	2,000	-0.04%	0.02%	0.00%	-0.03%	-0.02%	0.01%	-0.07%
2024-2036	2,100	-0.03%	0.02%	0.00%	-0.02%	-0.02%	0.01%	-0.05%
2024-2041	2,100	-0.03%	0.02%	0.00%	-0.02%	-0.02%	0.01%	-0.05%
2024-2046	2,100	-0.03%	0.02%	0.00%	-0.02%	-0.02%	0.01%	-0.05%
2024-2051	2,100	-0.03%	0.01%	0.00%	-0.02%	-0.01%	0.01%	-0.05%
2024-2056	2,000	-0.03%	0.01%	0.00%	-0.02%	-0.01%	0.01%	-0.04%



Figure C-2 (Continued)
Middlesex County
Employment Summary (Employment)

	Population (including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. ^[2]	Total Employment
Mid-2006	72,200	220	4,970	2,040	5,750	2,440	2,440	17,860
Mid-2011	74,000	1,210	4,570	5,550	5,770	1,660	1,660	20,420
Mid-2016	74,800	1,660	4,360	6,330	6,360	3,160	3,160	25,030
Mid-2024	86,000	1,750	5,070	7,210	7,900	5,430	4,290	31,650
Mid-2026	89,600	1,760	5,290	7,480	8,070	5,580	4,440	32,620
Mid-2031	100,200	1,790	6,010	8,370	9,020	6,150	5,040	36,380
Mid-2036	111,100	1,810	6,770	9,270	9,900	6,750	5,640	40,140
Mid-2041	122,200	1,830	7,560	10,230	10,760	7,330	6,210	43,920
Mid-2046	133,100	1,850	8,330	11,090	11,610	7,920	6,820	47,620
Mid-2051	143,700	1,860	9,020	11,890	12,350	8,520	7,410	51,050
Mid-2056	151,500	1,860	9,550	12,580	12,880	9,020	7,930	53,820
Total Incremental								
2006-2011	1,800	990	-400	3,510	20	-780	-780	2,560
2011-2016	800	450	-210	780	590	1,500	1,500	4,610
2016-2024	11,200	50	500	130	-430	1,070	950	2,270
2024-2026	3,600	10	220	270	170	150	150	970
2024-2031	14,200	40	940	1,160	1,120	720	750	4,730
2024-2036	25,100	60	1,700	2,060	2,000	1,320	1,350	8,490
2024-2041	36,200	80	2,490	3,020	2,860	1,900	1,920	12,270
2024-2046	47,100	100	3,260	3,880	3,710	2,490	2,530	15,970
2024-2051	57,700	110	3,950	4,680	4,450	3,090	3,120	19,400
2024-2056	65,500	110	4,480	5,370	4,980	3,590	3,640	22,170
Annual Average Incremental								
2006-2011	360	198	-80	702	4	-156	-156	512
2011-2016	160	90	-42	156	118	300	300	922
2016-2024	1,400	10	100	26	-86	214	190	454
2024-2026	1,800	6	110	137	82	73	74	481
2024-2031	2,000	6	135	165	159	103	107	676
2024-2036	2,100	5	142	172	166	110	113	708
2024-2041	2,100	5	147	177	168	112	113	722
2024-2046	2,100	5	148	176	169	113	115	726
2024-2051	2,100	4	146	173	165	114	116	718
2024-2056	2,000	4	140	168	156	112	114	693



Notes associated with Figure C-2:

^[1] Population adjusted to account for net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded and may not add precisely. Figures exclude the City of London.

Source: Historical 2006 to 2016 data derived from Statistics Canada Place of Work data; 2024 to 2056 forecast prepared by Watson & Associates Economists Ltd.



Appendix D

Headship Rates



Appendix D: Headship Rates

Figure D-1
Middlesex County
Headship Rates, 2001 to 2056

Age Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056
15-24	0.03561	0.04233	0.03278	0.03763	0.02819	0.02819	0.02819	0.02819	0.02819	0.02825	0.02819	0.02819
25-34	0.39253	0.37925	0.35467	0.37772	0.35654	0.35654	0.35654	0.35654	0.35654	0.35726	0.35654	0.35654
35-44	0.48795	0.47416	0.49007	0.47823	0.48189	0.48189	0.48189	0.48189	0.48189	0.48286	0.48189	0.48189
45-54	0.51525	0.50759	0.51229	0.52990	0.50373	0.50373	0.50373	0.50373	0.50373	0.50473	0.50373	0.50373
55-64	0.54480	0.52755	0.52114	0.54010	0.52919	0.52919	0.52919	0.52919	0.52919	0.53025	0.53025	0.53025
65-74	0.58471	0.56850	0.55625	0.57333	0.55686	0.55686	0.55686	0.55686	0.55686	0.55797	0.55797	0.55797
75+	0.60216	0.60453	0.56779	0.60068	0.61237	0.61237	0.61237	0.61237	0.61237	0.61359	0.61359	0.61359
Total	0.33378	0.33790	0.34470	0.36294	0.36007	0.36383	0.36483	0.36653	0.36848	0.37222	0.37625	0.38347

Note: Figures exclude the City of London.
Source: 2001 to 2021 derived from Statistics Canada data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Appendix E

Residential Units in Active Development Approvals in Middlesex County by Area Municipality



Appendix E: Residential Units in Active Development Approvals

Figure E-1
Middlesex County
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	989	316	0	1,305
Draft Approved	2,194	1,631	0	3,825
Proposed	1,730	1,961	102	3,793
Middlesex County	4,913	3,908	102	8,923

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.

Figure E-2
Township of Adelaide-Metcalfe
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	3	0	0	3
Draft Approved	0	0	0	0
Proposed	0	0	0	0
Township of Adelaide-Metcalfe	3	0	0	3

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.



Figure E-3
Township of Lucan-Biddulph
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	49	53	0	102
Draft Approved	75	59	0	134
Proposed	140	24	58	222
Township of Lucan-Biddulph	264	136	58	458

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.

Figure E-4
Municipality of Middlesex Centre
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	256	95	0	351
Draft Approved	456	200	0	656
Proposed	355	746	0	1,101
Municipality of Middlesex Centre	1,067	1,041	0	2,108

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.



Figure E-5
Village of Newbury
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	17	0	0	17
Village of Newbury	17	0	0	17

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.

Figure E-6
Municipality of North Middlesex
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	137	6	0	143
Draft Approved	202	66	0	268
Proposed	459	260	0	719
Municipality of North Middlesex	798	332	0	1,130

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.



Figure E-7
Municipality of Southwest Middlesex
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	67	0	0	67
Draft Approved	200	98	0	298
Proposed	63	34	0	97
Municipality of Southwest Middlesex	330	132	0	462

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.

Figure E-8
Municipality of Strathroy-Caradoc
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	221	0	0	221
Draft Approved	682	784	0	1,466
Proposed	336	473	0	809
Municipality of Strathroy-Caradoc	1,239	1,257	0	2,496

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.



Figure E-9
Municipality of Thames Centre
Residential Units in Active Development Approvals

-	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	256	162	0	418
Draft Approved	579	424	0	1,003
Proposed	360	424	44	828
Municipality of Thames Centre	1,195	1,010	44	2,249

^[1] Low density includes single and semi-detached houses.

^[2] Medium density includes townhouses and apartments in duplexes.

^[3] High density includes apartment units.

Source: Data provided by Middlesex County as of February 28, 2025, summarized by Watson & Associates Economists Ltd.



Appendix F

Population, Housing, and Employment Allocation by Area Municipality



Appendix F: Population, Housing and Employment Allocation by Area Municipality

Township of Adelaide-Metcalf

Figure F-1
Township of Adelaide-Metcalf
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	3,300	3,100	0	3,100	940	10	20	0	960	3.43	3.28
	Mid-2006	3,300	3,100	200	3,000	970	10	10	10	990	3.31	3.16
	Mid-2011	3,200	3,000	0	3,000	1,000	10	10	10	1,020	3.11	2.98
	Mid-2016	3,100	3,000	100	2,900	980	0	10	0	990	3.17	3.04
	Mid-2021	3,100	3,000	100	2,900	1,010	0	10	10	1,020	3.09	2.95
Forecast	Mid-2026	3,200	3,100	100	3,000	1,050	0	10	10	1,060	3.04	2.91
	Mid-2031	3,400	3,300	100	3,200	1,110	0	10	10	1,130	3.02	2.89
	Mid-2036	3,600	3,500	100	3,400	1,200	0	10	10	1,210	2.99	2.86
	Mid-2041	3,900	3,700	100	3,600	1,310	0	10	10	1,320	2.97	2.84
	Mid-2046	4,200	4,000	100	3,900	1,420	0	10	10	1,440	2.92	2.80
	Mid-2051	4,500	4,300	100	4,200	1,540	0	10	10	1,560	2.88	2.76
	Mid-2056	4,700	4,500	200	4,300	1,650	0	10	10	1,660	2.81	2.69
Increment	Mid-2001 to Mid-2021	-200	-100	100	-200	70	-10	-10	10	60	-	-
	Mid-2021 to Mid-2026	100	100	0	100	40	0	0	0	40	-	-
	Mid-2021 to Mid-2031	300	300	0	300	100	0	0	0	110	-	-
	Mid-2021 to Mid-2036	500	500	0	500	190	0	0	0	190	-	-
	Mid-2021 to Mid-2041	800	700	0	700	300	0	0	0	300	-	-
	Mid-2021 to Mid-2046	1,100	1,000	0	1,000	410	0	0	0	420	-	-
	Mid-2021 to Mid-2051	1,400	1,300	0	1,300	530	0	0	0	540	-	-
	Mid-2021 to Mid-2056	1,600	1,500	100	1,400	640	0	0	0	640	-	-



Notes associated with Figure F-1:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-2
Township of Adelaide-Metcalfe
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	3,300	310	360	420	140	150	150	1,530	46.4%
	Mid-2011	3,200	170	330	230	140	70	90	1,030	32.2%
	Mid-2016	3,100	330	280	240	180	110	140	1,280	41.3%
	Mid-2021	3,100	350	350	350	250	170	230	1,700	54.8%
Forecast	Mid-2024	3,200	340	330	270	300	200	240	1,680	52.4%
	Mid-2026	3,200	340	330	270	300	210	250	1,700	52.7%
	Mid-2031	3,400	350	340	280	360	250	270	1,840	54.0%
	Mid-2036	3,600	350	360	280	430	290	300	2,000	55.1%
	Mid-2041	3,900	350	380	290	490	330	330	2,160	55.1%
	Mid-2046	4,200	350	400	290	550	370	370	2,330	55.3%
	Mid-2051	4,500	350	420	300	600	420	420	2,500	55.7%
	Mid-2056	4,700	360	430	300	640	450	460	2,640	56.4%
Increment	Mid-2006 to Mid-2024	-100	40	-30	-140	160	60	100	180	6.0%
	Mid-2024 to Mid-2026	0	0	0	0	10	10	0	20	0.3%
	Mid-2024 to Mid-2031	200	10	10	10	70	40	20	160	1.6%
	Mid-2024 to Mid-2036	400	10	30	10	130	90	50	320	2.7%
	Mid-2024 to Mid-2041	700	10	50	20	190	130	90	480	2.7%
	Mid-2024 to Mid-2046	1,000	10	70	20	250	170	130	650	2.9%
	Mid-2024 to Mid-2051	1,300	10	90	20	310	210	170	820	3.3%
	Mid-2024 to Mid-2056	1,500	20	100	30	350	250	220	960	4.0%



Notes associated with Figure F-2:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.



Township of Lucan Biddulph

Figure F-3
Township of Lucan Biddulph
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	4,400	4,200	0	4,200	1,290	10	130	10	1,440	3.06	2.93
	Mid-2006	4,400	4,200	0	4,100	1,340	20	150	10	1,510	2.91	2.78
	Mid-2011	4,500	4,300	0	4,300	1,460	30	90	20	1,600	2.83	2.71
	Mid-2016	4,900	4,700	100	4,600	1,630	40	120	20	1,790	2.75	2.63
	Mid-2021	5,900	5,700	100	5,600	1,910	70	140	10	2,120	2.80	2.68
Forecast	Mid-2026	6,800	6,500	100	6,400	2,080	120	300	10	2,500	2.73	2.61
	Mid-2031	7,900	7,600	100	7,500	2,370	160	360	10	2,900	2.73	2.61
	Mid-2036	8,700	8,300	100	8,200	2,600	200	410	10	3,210	2.72	2.60
	Mid-2041	9,400	9,000	100	8,900	2,800	230	450	10	3,490	2.70	2.58
	Mid-2046	9,900	9,500	100	9,400	2,970	260	500	10	3,730	2.67	2.55
	Mid-2051	10,500	10,000	100	9,900	3,150	280	530	10	3,960	2.64	2.53
	Mid-2056	10,900	10,400	100	10,300	3,320	290	570	10	4,190	2.59	2.48
Increment	Mid-2001 to Mid-2021	1,500	1,500	100	1,400	620	60	10	0	680	-	-
	Mid-2021 to Mid-2026	900	800	0	800	170	50	160	0	380	-	-
	Mid-2021 to Mid-2031	2,000	1,900	0	1,900	460	90	220	0	780	-	-
	Mid-2021 to Mid-2036	2,800	2,600	0	2,600	690	130	270	0	1,090	-	-
	Mid-2021 to Mid-2041	3,500	3,300	0	3,300	890	160	310	0	1,370	-	-
	Mid-2021 to Mid-2046	4,000	3,800	0	3,800	1,060	190	360	0	1,610	-	-
	Mid-2021 to Mid-2051	4,600	4,300	0	4,300	1,240	210	390	0	1,840	-	-
	Mid-2021 to Mid-2056	5,000	4,700	0	4,700	1,410	220	430	0	2,070	-	-



Notes associated with Figure F-3:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-4
Township of Lucan Biddulph
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	4,400	130	330	160	270	240	130	1,260	28.6%
	Mid-2011	4,500	60	220	180	430	260	100	1,250	27.8%
	Mid-2016	4,900	110	260	240	340	180	200	1,330	27.1%
	Mid-2021	5,900	180	740	220	360	300	310	2,110	35.8%
Forecast	Mid-2024	6,500	120	300	270	600	410	330	2,020	30.9%
	Mid-2026	6,800	120	320	270	620	430	330	2,090	30.5%
	Mid-2031	7,900	130	420	280	740	500	360	2,430	30.7%
	Mid-2036	8,700	140	530	300	860	600	390	2,820	32.3%
	Mid-2041	9,400	140	650	330	1,000	680	420	3,220	34.2%
	Mid-2046	9,900	150	770	360	1,140	770	450	3,640	36.6%
	Mid-2051	10,500	150	890	380	1,270	880	480	4,050	38.7%
	Mid-2056	10,900	150	970	400	1,350	950	510	4,330	39.8%
Increment	Mid-2006 to Mid-2024	2,100	-20	-30	110	330	180	190	770	2.3%
	Mid-2024 to Mid-2026	300	0	30	0	20	20	10	70	-0.4%
	Mid-2024 to Mid-2031	1,400	10	120	10	140	90	40	410	-0.2%
	Mid-2024 to Mid-2036	2,200	20	240	30	270	180	70	800	1.4%
	Mid-2024 to Mid-2041	2,900	30	350	70	400	270	100	1,200	3.3%
	Mid-2024 to Mid-2046	3,400	30	470	100	540	360	130	1,630	5.7%
	Mid-2024 to Mid-2051	4,000	40	590	120	670	460	160	2,030	7.7%
	Mid-2024 to Mid-2056	4,300	40	670	130	750	540	180	2,310	8.9%



Notes associated with Figure F-4:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.



Municipality of Middlesex Centre

Figure F-5
Municipality of Middlesex Centre
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	14,900	14,200	400	13,800	4,570	30	120	10	4,720	3.15	3.02
	Mid-2006	16,300	15,600	500	15,100	4,830	300	90	30	5,240	3.11	2.98
	Mid-2011	17,200	16,500	300	16,100	5,410	150	90	0	5,650	3.05	2.92
	Mid-2016	18,000	17,300	400	16,900	5,720	140	130	10	5,980	3.02	2.89
	Mid-2021	19,800	18,900	200	18,700	6,160	240	160	140	6,700	2.96	2.83
Forecast	Mid-2026	22,800	21,800	200	21,600	6,910	530	200	140	7,780	2.93	2.81
	Mid-2031	26,400	25,200	300	24,900	7,870	710	300	140	9,010	2.92	2.80
	Mid-2036	30,100	28,700	300	28,400	8,760	980	500	140	10,380	2.90	2.77
	Mid-2041	33,800	32,300	300	32,000	9,660	1,260	720	140	11,780	2.87	2.74
	Mid-2046	37,500	35,800	300	35,500	10,580	1,560	950	140	13,220	2.83	2.71
	Mid-2051	40,900	39,100	400	38,700	11,430	1,850	1,230	140	14,640	2.79	2.67
	Mid-2056	43,400	41,500	400	41,100	12,120	2,090	1,510	140	15,850	2.74	2.62
Increment	Mid-2001 to Mid-2021	4,900	4,700	-200	4,900	1,590	210	40	130	1,980	-	-
	Mid-2021 to Mid-2026	3,000	2,900	0	2,900	750	290	40	0	1,080	-	-
	Mid-2021 to Mid-2031	6,600	6,300	100	6,200	1,710	470	140	0	2,310	-	-
	Mid-2021 to Mid-2036	10,300	9,800	100	9,700	2,600	740	340	0	3,680	-	-
	Mid-2021 to Mid-2041	14,000	13,400	100	13,300	3,500	1,020	560	0	5,080	-	-
	Mid-2021 to Mid-2046	17,700	16,900	100	16,800	4,420	1,320	790	0	6,520	-	-
	Mid-2021 to Mid-2051	21,100	20,200	200	20,000	5,270	1,610	1,070	0	7,940	-	-
	Mid-2021 to Mid-2056	23,600	22,600	200	22,400	5,960	1,850	1,350	0	9,150	-	-



Notes associated with Figure F-5:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-6
Municipality of Middlesex Centre
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	16,300	250	1,220	1,110	930	900	590	5,000	30.7%
	Mid-2011	17,200	240	1,220	1,090	870	750	370	4,540	26.4%
	Mid-2016	18,000	270	1,260	1,190	1,230	900	850	5,700	31.7%
	Mid-2021	19,800	270	2,840	1,130	1,070	820	990	7,120	36.0%
Forecast	Mid-2024	21,700	280	1,460	1,350	1,990	1,370	1,040	7,480	34.5%
	Mid-2026	22,800	280	1,550	1,470	2,050	1,420	1,090	7,860	34.4%
	Mid-2031	26,400	290	1,800	1,860	2,390	1,620	1,280	9,240	35.1%
	Mid-2036	30,100	290	1,980	2,230	2,590	1,790	1,470	10,330	34.4%
	Mid-2041	33,800	290	2,200	2,560	2,790	1,960	1,630	11,430	33.8%
	Mid-2046	37,500	290	2,380	2,790	3,030	2,130	1,790	12,400	33.1%
	Mid-2051	40,900	300	2,500	3,000	3,190	2,280	1,930	13,200	32.3%
	Mid-2056	43,400	300	2,590	3,200	3,310	2,410	2,050	13,850	31.9%
Increment	Mid-2006 to Mid-2024	5,400	30	240	240	1,060	470	450	2,480	3.9%
	Mid-2024 to Mid-2026	1,100	0	80	120	60	50	50	380	-0.1%
	Mid-2024 to Mid-2031	4,700	10	330	520	390	260	250	1,760	0.5%
	Mid-2024 to Mid-2036	8,400	10	510	890	600	420	430	2,850	-0.1%
	Mid-2024 to Mid-2041	12,100	10	740	1,210	800	590	590	3,950	-0.7%
	Mid-2024 to Mid-2046	15,800	20	920	1,440	1,030	760	750	4,920	-1.4%
	Mid-2024 to Mid-2051	19,200	20	1,040	1,660	1,200	920	890	5,720	-2.3%
	Mid-2024 to Mid-2056	21,800	20	1,130	1,850	1,310	1,040	1,020	6,370	-2.6%



Notes associated with Figure F-6:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.



Village of Newbury

Figure F-7
Village of Newbury
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	400	400	0	400	150	10	0	0	160	2.85	2.72
	Mid-2006	500	400	0	400	150	0	30	10	180	2.55	2.44
	Mid-2011	500	400	0	500	160	0	30	0	190	2.45	2.34
	Mid-2016	500	500	0	400	160	0	10	0	170	2.86	2.74
	Mid-2021	500	400	0	400	180	10	20	0	200	2.36	2.26
Forecast	Mid-2026	500	500	0	500	190	10	20	0	210	2.38	2.27
	Mid-2031	600	500	0	500	210	10	20	0	240	2.41	2.31
	Mid-2036	600	600	0	600	230	10	20	0	260	2.44	2.33
	Mid-2041	700	700	0	700	250	10	30	0	280	2.46	2.35
	Mid-2046	700	700	0	700	260	10	30	0	300	2.46	2.35
	Mid-2051	800	800	0	800	280	10	30	0	320	2.45	2.34
	Mid-2056	800	800	0	800	290	10	40	0	340	2.42	2.32
Increment	Mid-2001 to Mid-2021	100	0	0	0	30	0	20	0	40	-	-
	Mid-2021 to Mid-2026	0	100	0	100	10	0	0	0	10	-	-
	Mid-2021 to Mid-2031	100	100	0	100	30	0	0	0	40	-	-
	Mid-2021 to Mid-2036	100	200	0	200	50	0	0	0	60	-	-
	Mid-2021 to Mid-2041	200	300	0	300	70	0	10	0	80	-	-
	Mid-2021 to Mid-2046	200	300	0	300	80	0	10	0	100	-	-
	Mid-2021 to Mid-2051	300	400	0	400	100	0	10	0	120	-	-
	Mid-2021 to Mid-2056	300	400	0	400	110	0	20	0	140	-	-



Notes associated with Figure F-7:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-8
Village of Newbury
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	500	10	10	20	120	150	30	340	68.0%
	Mid-2011	500	0	0	0	60	80	0	140	28.0%
	Mid-2016	500	0	30	30	70	110	30	270	54.0%
	Mid-2021	500	0	10	30	90	70	30	230	46.0%
Forecast	Mid-2024	500	0	40	30	40	30	30	170	36.6%
	Mid-2026	500	0	40	30	40	30	30	170	33.0%
	Mid-2031	600	0	40	40	50	30	40	190	34.0%
	Mid-2036	600	0	50	40	50	40	40	220	34.5%
	Mid-2041	700	0	50	40	60	40	50	240	34.1%
	Mid-2046	700	0	50	50	60	40	50	260	34.4%
	Mid-2051	800	0	60	50	70	50	60	270	34.6%
	Mid-2056	800	0	60	50	70	50	60	290	35.1%
Increment	Mid-2006 to Mid-2024	0	-10	30	20	-80	-120	-10	-170	-31.4%
	Mid-2024 to Mid-2026	100	0	0	0	0	0	0	0	-3.6%
	Mid-2024 to Mid-2031	100	0	10	0	10	0	10	30	-2.6%
	Mid-2024 to Mid-2036	200	0	10	10	10	10	10	50	-2.1%
	Mid-2024 to Mid-2041	200	0	10	10	20	10	20	70	-2.5%
	Mid-2024 to Mid-2046	300	0	20	10	20	10	20	90	-2.3%
	Mid-2024 to Mid-2051	300	0	20	10	30	20	30	110	-2.0%
	Mid-2024 to Mid-2056	400	0	20	20	30	20	40	120	-1.5%



Notes associated with Figure F-8:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.



Municipality of North Middlesex

Figure F-9
Municipality of North Middlesex
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	7,200	6,900	0	6,900	2,180	70	80	20	2,330	3.10	2.96
	Mid-2006	7,000	6,700	300	6,500	2,170	20	100	30	2,310	3.05	2.92
	Mid-2011	7,000	6,700	300	6,400	2,200	10	130	10	2,340	2.97	2.84
	Mid-2016	6,600	6,400	200	6,100	2,190	10	120	30	2,350	2.83	2.71
	Mid-2021	6,600	6,300	200	6,100	2,190	10	180	20	2,390	2.76	2.64
Forecast	Mid-2026	6,800	6,500	200	6,300	2,290	20	180	20	2,510	2.71	2.60
	Mid-2031	7,200	6,900	200	6,700	2,440	30	180	20	2,660	2.69	2.58
	Mid-2036	7,600	7,200	200	7,000	2,580	50	190	20	2,840	2.67	2.55
	Mid-2041	8,000	7,700	200	7,500	2,730	80	210	20	3,040	2.65	2.53
	Mid-2046	8,500	8,200	200	8,000	2,890	110	230	20	3,240	2.64	2.52
	Mid-2051	8,900	8,500	200	8,300	3,030	150	240	20	3,430	2.61	2.49
	Mid-2056	9,300	8,900	200	8,700	3,160	190	250	20	3,610	2.56	2.45
Increment	Mid-2001 to Mid-2021	-600	-600	200	-800	10	-60	100	0	60	-	-
	Mid-2021 to Mid-2026	200	200	0	200	100	10	0	0	120	-	-
	Mid-2021 to Mid-2031	600	600	0	600	250	20	0	0	270	-	-
	Mid-2021 to Mid-2036	1,000	900	0	900	390	40	10	0	450	-	-
	Mid-2021 to Mid-2041	1,400	1,400	0	1,400	540	70	30	0	650	-	-
	Mid-2021 to Mid-2046	1,900	1,900	0	1,900	700	100	50	0	850	-	-
	Mid-2021 to Mid-2051	2,300	2,200	0	2,200	840	140	60	0	1,040	-	-
	Mid-2021 to Mid-2056	2,700	2,600	0	2,600	970	180	70	0	1,220	-	-



Notes associated with Figure F-9:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-10
Municipality of North Middlesex
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	7,000	130	770	220	410	430	260	2,220	31.7%
	Mid-2011	7,000	140	570	140	380	470	120	1,820	26.0%
	Mid-2016	6,600	260	580	230	360	490	260	2,180	33.0%
	Mid-2021	6,600	160	730	190	370	410	280	2,140	32.4%
Forecast	Mid-2024	6,700	270	670	260	620	420	290	2,530	37.6%
	Mid-2026	6,800	270	680	260	620	430	290	2,550	37.5%
	Mid-2031	7,200	280	700	280	660	450	300	2,660	37.1%
	Mid-2036	7,600	290	730	310	690	470	320	2,810	37.1%
	Mid-2041	8,000	290	760	340	730	500	340	2,970	36.9%
	Mid-2046	8,500	290	790	370	770	530	370	3,130	36.6%
	Mid-2051	8,900	290	820	400	820	560	390	3,280	36.7%
	Mid-2056	9,300	290	840	430	850	590	410	3,410	36.8%
Increment	Mid-2006 to Mid-2024	-300	140	-100	40	210	0	30	320	5.9%
	Mid-2024 to Mid-2026	100	0	10	0	0	0	0	20	-0.1%
	Mid-2024 to Mid-2031	500	10	20	20	40	20	20	130	-0.6%
	Mid-2024 to Mid-2036	800	10	60	50	70	50	30	280	-0.5%
	Mid-2024 to Mid-2041	1,300	20	90	80	110	80	60	440	-0.7%
	Mid-2024 to Mid-2046	1,800	20	120	110	160	110	80	600	-1.0%
	Mid-2024 to Mid-2051	2,200	20	150	140	200	140	100	750	-0.9%
	Mid-2024 to Mid-2056	2,500	20	170	170	230	160	130	880	-0.8%



Notes associated with Figure F-10:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.



Municipality of Southwest Middlesex

Figure F-11
Municipality of Southwest Middlesex
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	6,400	6,100	0	6,100	2,040	50	150	20	2,250	2.86	2.74
	Mid-2006	6,200	5,900	100	5,800	2,060	90	140	10	2,290	2.69	2.58
	Mid-2011	6,100	5,900	100	5,800	2,100	80	140	40	2,350	2.60	2.49
	Mid-2016	6,000	5,700	100	5,700	2,110	90	160	10	2,350	2.55	2.44
	Mid-2021	6,200	5,900	100	5,800	2,150	70	190	10	2,410	2.56	2.45
Forecast	Mid-2026	6,300	6,000	100	5,900	2,220	90	190	10	2,500	2.52	2.41
	Mid-2031	6,600	6,300	100	6,200	2,310	120	200	10	2,630	2.51	2.40
	Mid-2036	6,900	6,600	100	6,500	2,410	150	210	10	2,770	2.48	2.37
	Mid-2041	7,200	6,900	100	6,800	2,540	190	220	10	2,950	2.45	2.35
	Mid-2046	7,600	7,300	100	7,200	2,650	230	240	10	3,130	2.43	2.32
	Mid-2051	7,900	7,600	100	7,500	2,760	290	270	10	3,320	2.39	2.29
	Mid-2056	8,200	7,900	100	7,800	2,840	340	310	10	3,500	2.35	2.25
Increment	Mid-2001 to Mid-2021	-200	-200	100	-300	110	20	40	-10	160	-	-
	Mid-2021 to Mid-2026	100	100	0	100	70	20	0	0	90	-	-
	Mid-2021 to Mid-2031	400	400	0	400	160	50	10	0	220	-	-
	Mid-2021 to Mid-2036	700	700	0	700	260	80	20	0	360	-	-
	Mid-2021 to Mid-2041	1,000	1,000	0	1,000	390	120	30	0	540	-	-
	Mid-2021 to Mid-2046	1,400	1,400	0	1,400	500	160	50	0	720	-	-
	Mid-2021 to Mid-2051	1,700	1,700	0	1,700	610	220	80	0	910	-	-
	Mid-2021 to Mid-2056	2,000	2,000	0	2,000	690	270	120	0	1,090	-	-



Notes associated with Figure F-11:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-12
Municipality of Southwest Middlesex
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	6,200	70	450	790	400	230	140	2,080	33.5%
	Mid-2011	6,100	90	370	380	510	340	150	1,840	30.2%
	Mid-2016	6,000	90	320	350	450	290	210	1,710	28.5%
	Mid-2021	6,200	90	460	310	350	290	180	1,680	27.1%
Forecast	Mid-2024	6,300	90	370	400	580	400	190	2,030	32.3%
	Mid-2026	6,300	100	370	400	580	400	190	2,040	32.3%
	Mid-2031	6,600	100	390	420	600	410	200	2,130	32.3%
	Mid-2036	6,900	110	420	440	640	440	220	2,260	32.9%
	Mid-2041	7,200	110	440	480	660	450	240	2,380	32.9%
	Mid-2046	7,600	110	460	510	690	470	270	2,510	33.0%
	Mid-2051	7,900	120	490	540	710	490	290	2,620	33.0%
	Mid-2056	8,200	120	510	560	730	510	300	2,720	33.1%
Increment	Mid-2006 to Mid-2024	100	30	-80	-390	180	170	60	-30	-1.2%
	Mid-2024 to Mid-2026	0	0	0	0	0	0	0	20	0.0%
	Mid-2024 to Mid-2031	300	10	20	20	30	20	10	110	0.0%
	Mid-2024 to Mid-2036	600	10	50	40	60	40	30	230	0.5%
	Mid-2024 to Mid-2041	1,000	20	70	80	80	60	50	350	0.5%
	Mid-2024 to Mid-2046	1,300	20	100	110	110	70	70	480	0.6%
	Mid-2024 to Mid-2051	1,700	20	120	140	130	90	90	600	0.7%
	Mid-2024 to Mid-2056	2,000	20	140	160	150	110	110	700	0.7%



Notes associated with Figure F-12:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.



Municipality of Strathroy-Caradoc

Figure F-13
Municipality of Strathroy-Caradoc
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	20,000	19,100	0	19,100	5,780	270	900	50	6,990	2.86	2.73
	Mid-2006	20,900	20,000	200	19,800	6,110	330	900	170	7,500	2.78	2.66
	Mid-2011	21,900	21,000	600	20,300	6,490	290	1,010	180	7,970	2.75	2.63
	Mid-2016	21,800	20,900	300	20,500	6,770	320	1,030	190	8,300	2.63	2.52
	Mid-2021	25,000	23,900	300	23,600	7,520	460	1,270	220	9,460	2.64	2.52
Forecast	Mid-2026	27,500	26,300	400	25,900	8,190	610	1,490	220	10,510	2.61	2.50
	Mid-2031	30,900	29,600	400	29,200	9,060	760	1,790	220	11,830	2.61	2.50
	Mid-2036	34,400	32,900	400	32,500	9,940	930	2,060	220	13,150	2.61	2.50
	Mid-2041	37,900	36,200	500	35,700	10,780	1,170	2,340	220	14,520	2.61	2.49
	Mid-2046	41,200	39,400	500	38,900	11,660	1,480	2,660	220	16,020	2.57	2.46
	Mid-2051	44,800	42,900	600	42,300	12,590	1,820	2,960	220	17,600	2.55	2.44
	Mid-2056	47,300	45,200	600	44,600	13,440	2,160	3,190	220	19,010	2.49	2.38
Increment	Mid-2001 to Mid-2021	5,000	4,800	300	4,500	1,740	190	370	170	2,470	-	-
	Mid-2021 to Mid-2026	2,500	2,400	100	2,300	670	150	220	0	1,050	-	-
	Mid-2021 to Mid-2031	5,900	5,700	100	5,600	1,540	300	520	0	2,370	-	-
	Mid-2021 to Mid-2036	9,400	9,000	100	8,900	2,420	470	790	0	3,690	-	-
	Mid-2021 to Mid-2041	12,900	12,300	200	12,100	3,260	710	1,070	0	5,060	-	-
	Mid-2021 to Mid-2046	16,200	15,500	200	15,300	4,140	1,020	1,390	0	6,560	-	-
	Mid-2021 to Mid-2051	19,800	19,000	300	18,700	5,070	1,360	1,690	0	8,140	-	-
	Mid-2021 to Mid-2056	22,300	21,300	300	21,000	5,920	1,700	1,920	0	9,550	-	-



Notes associated with Figure F-13:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-14
Municipality of Strathroy-Caradoc
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	20,900	400	790	2,930	2,370	1,330	600	8,420	40.3%
	Mid-2011	21,900	290	630	2,590	2,370	1,830	480	8,190	37.4%
	Mid-2016	21,800	270	730	2,920	2,480	1,750	770	8,920	40.9%
	Mid-2021	25,000	500	2,050	3,230	2,500	1,690	1,300	11,270	45.1%
Forecast	Mid-2024	25,900	280	850	3,320	2,380	1,630	1,350	9,810	37.9%
	Mid-2026	27,500	280	910	3,420	2,410	1,670	1,410	10,090	36.7%
	Mid-2031	30,900	280	1,080	3,690	2,600	1,810	1,620	11,090	35.9%
	Mid-2036	34,400	280	1,280	3,960	2,860	1,970	1,810	12,170	35.4%
	Mid-2041	37,900	280	1,460	4,270	3,080	2,100	1,970	13,160	34.8%
	Mid-2046	41,200	280	1,640	4,560	3,290	2,210	2,140	14,120	34.3%
	Mid-2051	44,800	280	1,810	4,840	3,480	2,340	2,310	15,060	33.6%
	Mid-2056	47,300	280	1,900	5,090	3,610	2,460	2,460	15,800	33.4%
Increment	Mid-2006 to Mid-2024	5,000	-120	70	390	10	300	760	1,410	-2.4%
	Mid-2024 to Mid-2026	1,600	0	60	100	40	30	60	280	-1.2%
	Mid-2024 to Mid-2031	5,000	0	230	370	220	180	270	1,280	-2.1%
	Mid-2024 to Mid-2036	8,500	0	430	650	480	330	460	2,360	-2.5%
	Mid-2024 to Mid-2041	12,000	0	610	950	710	460	620	3,350	-3.2%
	Mid-2024 to Mid-2046	15,300	0	790	1,240	910	580	790	4,310	-3.7%
	Mid-2024 to Mid-2051	19,000	0	960	1,520	1,100	710	960	5,250	-4.3%
	Mid-2024 to Mid-2056	21,400	0	1,040	1,770	1,230	830	1,110	5,990	-4.5%



Notes associated with Figure F-14:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.



Municipality of Thames Centre

Figure F-15
Municipality of Thames Centre
Summary of Population and Housing, 2001 to 2056

Year		Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Other	Total Households		
Historical	Mid-2001	13,000	12,500	0	12,500	4,040	70	110	120	4,330	3.02	2.88
	Mid-2006	13,700	13,100	100	13,000	4,220	80	130	170	4,590	2.98	2.85
	Mid-2011	13,600	13,000	0	13,000	4,370	70	110	180	4,730	2.88	2.75
	Mid-2016	13,800	13,200	0	13,200	4,530	80	160	160	4,930	2.80	2.68
	Mid-2021	14,600	14,000	100	13,900	4,740	140	210	100	5,180	2.82	2.70
Forecast	Mid-2026	15,600	15,000	100	14,900	5,080	200	210	100	5,590	2.80	2.68
	Mid-2031	17,300	16,600	200	16,400	5,600	290	220	100	6,210	2.79	2.67
	Mid-2036	19,200	18,400	200	18,200	6,190	390	250	100	6,940	2.77	2.65
	Mid-2041	21,300	20,300	200	20,100	6,840	500	280	100	7,720	2.76	2.64
	Mid-2046	23,400	22,400	200	22,200	7,480	610	320	100	8,510	2.75	2.63
	Mid-2051	25,300	24,200	300	23,900	8,070	720	380	100	9,280	2.73	2.61
	Mid-2056	27,000	25,800	300	25,500	8,590	840	470	100	10,000	2.70	2.58
Increment	Mid-2001 to Mid-2021	1,600	1,500	100	1,400	700	70	100	-20	850	-	-
	Mid-2021 to Mid-2026	1,000	1,000	0	1,000	340	60	0	0	410	-	-
	Mid-2021 to Mid-2031	2,700	2,600	100	2,500	860	150	10	0	1,030	-	-
	Mid-2021 to Mid-2036	4,600	4,400	100	4,300	1,450	250	40	0	1,760	-	-
	Mid-2021 to Mid-2041	6,700	6,300	100	6,200	2,100	360	70	0	2,540	-	-
	Mid-2021 to Mid-2046	8,800	8,400	100	8,300	2,740	470	110	0	3,330	-	-
	Mid-2021 to Mid-2051	10,700	10,200	200	10,000	3,330	580	170	0	4,100	-	-
	Mid-2021 to Mid-2056	12,400	11,800	200	11,600	3,850	700	260	0	4,820	-	-



Notes associated with Figure F-15:

^[1] Population includes net Census undercount estimated at approximately 4.6%.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses and apartments in duplexes.

^[4] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure F-16
Municipality of Thames Centre
Summary of Total Employment, 2006 to 2056

Year		Population (Including Census undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population- Related	Institutional	N.F.P.O.W.	Total Employment	Activity Rate
Historical	Mid-2006	13,700	260	1,050	1,230	880	330	550	4,300	31.4%
	Mid-2011	13,600	200	770	1,000	1,140	490	350	3,950	29.0%
	Mid-2016	13,800	350	910	1,160	1,250	370	700	4,740	34.3%
	Mid-2021	14,600	330	1,860	1,030	980	360	800	5,360	36.7%
Forecast	Mid-2024	15,300	370	1,060	1,310	1,410	970	830	5,940	38.8%
	Mid-2026	15,600	370	1,100	1,360	1,440	1,000	850	6,120	39.1%
	Mid-2031	17,300	370	1,250	1,520	1,630	1,070	960	6,800	39.3%
	Mid-2036	19,200	370	1,430	1,710	1,780	1,180	1,090	7,550	39.3%
	Mid-2041	21,300	370	1,630	1,920	1,950	1,280	1,220	8,370	39.3%
	Mid-2046	23,400	370	1,840	2,170	2,090	1,390	1,390	9,240	39.4%
	Mid-2051	25,300	370	2,040	2,390	2,230	1,500	1,550	10,080	39.8%
	Mid-2056	27,000	370	2,270	2,550	2,330	1,600	1,670	10,780	39.9%
Increment	Mid-2006 to Mid-2024	1,600	110	10	80	520	640	280	1,630	7.4%
	Mid-2024 to Mid-2026	300	0	50	50	30	30	30	180	0.3%
	Mid-2024 to Mid-2031	2,000	0	190	210	220	110	140	870	0.5%
	Mid-2024 to Mid-2036	3,900	0	380	390	380	210	260	1,620	0.4%
	Mid-2024 to Mid-2041	6,000	0	570	610	540	320	390	2,430	0.5%
	Mid-2024 to Mid-2046	8,100	0	780	850	690	420	560	3,300	0.6%
	Mid-2024 to Mid-2051	10,000	0	990	1,080	820	540	720	4,140	1.0%
	Mid-2024 to Mid-2056	11,700	0	1,210	1,240	920	640	840	4,840	1.1%



Notes associated with Figure F-16:

^[1] Includes net Census undercount estimated at approximately 4.6%.

^[2] 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: Figures have been rounded.

Source: Historical information derived from Statistics Canada Census; forecast prepared by Watson & Associates Economists Ltd.