

Municipality of Chatham-Kent

Community Development

Information Report

To: Mayor and Members of Council

From: Bruce McAllister, MCIP, RPP
General Manager, Community Development

Date: November 23, 2021

Subject: Update on Chatham-Kent's Growth Strategy and Preliminary Growth Forecasts

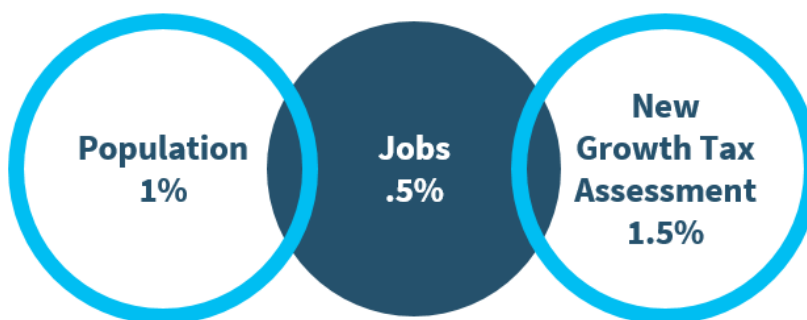
This report is for the information of Council.

Background

On February 10, 2020, Council approved the [CK Growth Strategy](#) to support enhanced quality of life in Chatham-Kent through increases in population, jobs, and new tax assessment.

The impetus to move forward with a targeted growth strategy was primarily based on the [2019 the Municipal Official Plan Comprehensive Review \(CR\) Phase 1 Report](#), which highlighted that while Chatham-Kent's population and employment base has been experiencing a modest increase, the annual population growth projection from 2019 to 2049 is predicted to only be 0.1%. Given these projections, in order to maintain current service levels in the community the options include raising taxes, cutting or changing services or growing CK to increase the overall tax base.

Based on this, targets were adopted for growth that included a 1% increase in population, a .5% increase in jobs and a 1.5% increase in new growth tax assessment. Achieving the Council endorsed Growth Strategy, would position CK as a desirable community to continue to live in and invest.



The Growth Strategy was approved approximately one month before the World Health Organization declared the COVID-19 Global Pandemic on March 11, 2020. It goes without saying much has changed in the world and locally since the Growth Strategy was adopted, including significant growth and development occurring across Chatham-Kent.

Comments

One initiative identified in the Growth Strategy was to further investigate Development Charges. In late 2020 Council approved moving forward with a [Development Charge Background Study](#). Development Charges are a means that municipalities can collect revenue to finance growth related infrastructure and ensure that “growth pays for a portion of growth”. Watson & Associates is preparing the Development Charge Background Study for the Municipality. Since the release of the final 2019 CR report, the Municipality has been experiencing significantly higher levels of growth and development than previously anticipated. Therefore, in late summer 2021, it was decided it would be prudent to revisit and update the 2019 CR to better inform the Development Charge Background Study and other upcoming planning initiatives.

Attached to this report, is an initial draft presentation of the updated municipal-wide population, housing and employment growth forecasts and allocations prepared by Watson & Associates.

As noted in the presentation, two key factors are contributing to the need to review the growth forecasts and urban land needs; including:

- Potential impacts of COVID-19 on the near-term and longer-term residential and non-residential growth outlook and urban land needs for the Municipality; and
- Updated Ministry of Finance (MOF) population projections for Chatham-Kent (Spring 2021). It is noted that these updated population projections are considerably higher than the previous spring 2020 population projections prepared by the MOF.

Based on Watson's revised “Reference Growth Scenario”, the following is a brief summary of the initial findings:

- Chatham-Kent's total permanent population is now forecast to increase from 104,800 in 2016 to 122,200 by 2051, representing an increase of 17,400 persons. This now represents an Annual Growth Rate 0.46% between 2021-2051; however, a 0.73% Annual Growth Rate is projected over the next 10 years (2021-2031). This equates to an additional 13,300 people compared to what was forecast in the 2019 CR.
- Permanent housing growth is forecast to average 280 new units annually between 2016 to 2051. Over the next 10 years (2021-2031) 382 new units annually are projected. Comparatively speaking, this represents significantly faster growth than

the historical average (75 units annually) that occurred between 2001 to 2016. In total, this equates to an additional 5,000 units compared to what was forecast in the 2019 CR.

- The total number of jobs within Chatham-Kent is forecast to increase from 39,500 in 2016 to 46,200 in 2051. In total, this equates to an additional 3,200 jobs compared to what was forecast in the 2019 CR.
- While single detached housing prices have risen dramatically over the past couple of years in Chatham-Kent to an average price of \$442,000 in 2021, it is still significantly lower than the majority of jurisdictions in Southern Ontario making Chatham-Kent still a very attractive option for housing investments.

In summary, the preliminary updated Growth Forecast is trending much closer to the aggressive targets adopted in the 2020 Growth Strategy vs the original forecasts in the 2019 CR.

The next steps for the 2021 Comprehensive Review will include:

- Complete the municipal-wide population, housing and employment growth forecast and allocations for each Primary and Secondary Urban centre as well as the remaining rural area. This will be used to support the updated Development Charge Background Study and will be completed in January 2022.
- Statistics Canada is releasing population and dwelling counts associated with the 2021 Census on February 9, 2022. The municipal-wide growth forecast and allocations would be reviewed and finalized upon the Census Release by March 2022.
- Completion of an updated urban land needs analysis over a 25-year planning horizon to be completed by August 2022, which will inform the need for any potential urban boundary expansions to further support growth over the long term. The review of potential urban boundary expansions will be initiated through a formal Official Plan amendment process.

For the Development Charge Background Study, next steps include:

- Complete the analysis based on revised growth forecasts (and potential staff interviews to re-confirm capital projections) late-January/early-February 2022.
- Present draft findings to Administration in late-February/early-March 2022.
- Finalize draft report late-March/early April 2022 and present findings to Council prior to public release of the report.
- Release the Background Study for public review in April 2022 and hold a formal public meeting in May 2022. The formal development charge by-law can be

passed a minimum of 60 days after the Background Study is released for public review and after a public meeting is held.

Other Growth Strategy Related Initiatives

A number of initiatives have been put into place over the past several years to set the stage for growth in CK, including:

- Transitioning the Planning Development Review service function in-house in 2016 and building an efficient team to deliver this new service area.
- Building effective synergies across Departments and Divisions and implementation of several red tape reduction measures in order to provide a more efficient development review service overall.
- The creation of new Development Standards in 2019 to provide clarity to the development community regarding the Municipality's expectations and to ensure good sustainable development. The Development Standards Manual is a "living" document that will be updated and amended from time-to-time to reflect changing conditions and best practices.
- During the first few months of the COVID-19 pandemic, Community Development supported the economy and local development by ensuring the Municipality was "open for business" by continuing to accept and process planning, building and community improvement applications, in contrast to many other municipalities who reduced or eliminated their planning and development services during this period. By doing so, this supported development and "shovel ready" projects after the Province lifted the Building Permit COVID-19 restrictions. In addition, Economic Development Services pivoted to provide even a higher level of support to our local businesses through various programs and services, such as the enhanced Digital Main Street programs.
- Through an internal re-organization in late 2020, the Community Attraction & Promotion (CAP) team was moved under the Community Development Department as a new Division along with Economic Development Services, Planning Services and Building Development Services. CAP oversees Resident Attraction and Retention, Tourism and the CK Local Immigration Partnership. In October 2021, administrative oversight and management of the CK Workforce Planning Board was also moved under CAP.

Many initiatives are ongoing across the organization to support the CK Growth Strategy. The following is a summary of some of the key priority initiatives that have already been put into place; those that are currently in progress and proposed future initiatives to continue support the CK Growth Strategy.

1. Capping Residential Permit Fees - set a maximum amount of \$50,000.00 per building for residential building permit fees and set a maximum amount of

\$20,000.00 per permit fee for residential buildings containing up to 20 dwelling units.

2. [CK Community Improvement Plan](#) - In March of 2020, Council approved the new CK Community Improvement Plan (CIP), which provides significant incentives for new greenfield developments, expansions and redevelopment opportunities. The CIP focuses on incentives for large apartment buildings, affordable housing developments, commercial, mixed-use commercial/residential and employment (industrial) uses. Uptake in the new CIP has been very successful with over 60 applications received to date. Specifically, the new CIP has attracted several large apartment projects that are now under construction with several more that are currently in the planning and design phases. Administration will be providing a more detailed summary on the CIP in early 2022.
3. Development Charge Background Study - As noted, in late 2020 Council approved moving forward with a Development Charge Background Study. Using the revised growth forecasts, the Development Charge Background Study will be presented in early Spring 2022. Council will ultimately decide whether to implement additional Development Charges after the background study is completed.
4. [Secondary Plan for the South Side of Wallaceburg](#) – in late 2020 Council approved moving forward with a Request for Proposal for a Secondary Plan for the South Side of Wallaceburg. The Wallaceburg south side neighbourhood is a high priority for detailed planning analysis and a secondary plan to support future growth. This project is well underway.
5. [Climate Change Action Plan \(CCAP\)](#) – the CCAP was delayed by several months due to COVID-19, but the process was formally restarted in May 2021. Effective Climate Change planning can have a positive impact on growth by potentially reducing operating costs, reducing infrastructure deficits through pursuing senior government funding with a climate lens, by reducing energy costs and improving human health and quality of life through enhanced air quality, active living and green spaces.
6. On December 14, 2020, Council approved the [Growth Plan Financing Report](#), which provided for additional funding to undertake key studies to support growth:
 - [Southwest Chatham Servicing Study](#) – early this year the Municipality initiated a Municipal Class Environmental Assessment (MCEA) Master Plan study to develop a strategy for sanitary, stormwater and water servicing of the southwest area of Chatham, which is significant growth area. The MCEA study will address present issues, short term servicing solutions, intermediate servicing requirements and future growth needs.
 - Imagine Wheatley Secondary Plan – the RFP process has been completed and this project will commence in early 2022. The purpose is to conduct research, undertake consultation, make recommendations and to prepare a

Secondary Plan and servicing strategy and for designated growth area in the south end of Community of Wheatley (The Imagine Wheatley project). The pursuit of the Imagine Wheatley project will respond to demand from developers and fulfil a key action of the Council-approved Chatham-Kent Growth Strategy to develop a neighbourhood-scale land use plan and servicing strategy for the area. While this project was planned before the unfortunate situation took place in Wheatley, it will be even more important in order to support Wheatley's recovery.

- Official Plan Comprehensive Review. The Comprehensive Review process has now restarted with the initiation of the the updated municipal-wide population, housing and employment growth forecasts and allocations. This work will continue in 2022 and will inform the need for any potential urban boundary expansions to further support growth over the long term. The review of potential urban boundary expansions will be initiated through a formal Official Plan amendment process.
 - New Official Plan - once the Comprehensive Review process is completed, Administration will begin the formal process to prepare a new Official Plan in 2023.
7. www.ChathamKentJobs.com – On November 18, 2021, the Municipality of Chatham-Kent and the CK Workforce Planning Board launched a new consolidated job postings tool to help job seekers and employers. The tool is a one-stop location for finding job postings and career information in Chatham-Kent. The tool consolidates information from up to 40 popular job boards and presents the postings to job seekers in one, easy-to-use spot. For employers and other community groups interested in labour market data, the tool offers valuable labour market information. In order to continue to support growth in the community, talent attraction and retention to support local employers' workforce needs is a top priority. With the onset of COVID-19 the need to attract and retain talent has only increased and the Chatham-Kent Jobs tool will be a vital asset to support our community's recovery and resiliency moving forward.

Consultation

The Executive Management Team and Senior Management Team were consulted in the preparation of this report.

Financial Implications

There are no financial implications to this report.

Prepared by:

A handwritten signature in black ink, appearing to read "Bruce McAllister".

Bruce McAllister, MCIP, RPP
General Manager, Community Development

Attachments: Watson & Associates, Municipality of Chatham-Kent Comprehensive Review (Preliminary Growth Scenarios) & Development Charge Study Update, November 2021.

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The background of the slide is a photograph of a town, likely Chatham-Kent, featuring a river, a stone bridge, and several brick buildings. The sky is clear and blue, and there are some trees in the foreground.

Municipality of Chatham-Kent Comprehensive Review (Preliminary Growth Scenarios) & Development Charge Study Update

December 2021

Presentation Outline



- Introductions
- Study Purpose
- Policy Context
- Economic and Demographic Growth Model & Recent Demographic Trends
- Growth Drivers and Disruptors
- Long-Term Population and Employment Growth Scenarios, 2016 to 2051
- Evaluation of Reference Scenario Growth
- Next Steps

Comprehensive Review Overview



- In 2019 Chatham-Kent completed a Comprehensive Review (CR) as background to the Municipality's Official Plan Review (OPR).
- Since the release of the final CR report in 2019 the Municipality has been experiencing significantly stronger urban growth pressures than previously anticipated. Two key factors are contributing to the need to review of the long-term population, household and employment growth forecasts and urban land needs; including:
 - Potential impacts of COVID-19 on the near-term and longer-term residential and non-residential growth outlook and urban land needs for the Municipality; and
 - Updated Ministry of Finance (MOF) population projections for Chatham-Kent (Spring 2021). It is noted that these updated population projections are considerably higher than the previous spring 2020 population projections prepared by the MOF.
- The 2021 CR will also be used to support the Municipality's current Development Charges Background Study (DCBS).

Comprehensive Review Overview



The key tasks to be carried out as part of Phase 1 include:

- Phase 1a: Municipal-wide population, housing and employment growth forecast and allocations by Urban Community as well as remaining rural area. This will be used to support the updated DCBS and will be completed by **January 2022**.
- Phase 1b: Statistics Canada is releasing population and dwelling counts associated with the 2021 Census on February 9, 2022. It is proposed the Municipal-wide growth forecast and allocations would be reviewed and finalized upon the Census Release by **March 2022**.

Comprehensive Review Overview



In addition to the Phase 1 tasks, the following will be carried out as part of the Development Charges Background Study, which includes:

- Undertake analysis (and potential staff interviews) **late-January / early-February 2022.**
- Present draft findings to staff **late-February / early-March 2022** (confirm if findings are to be presented to Council prior to release of report).
- Finalize the report **late-March / early April 2022.**
- By-law minimum 60 days (**late-May / early-June 2022**) after release of report , Public meeting to occur some time between release of report and by-law passage.

Comprehensive Review Overview

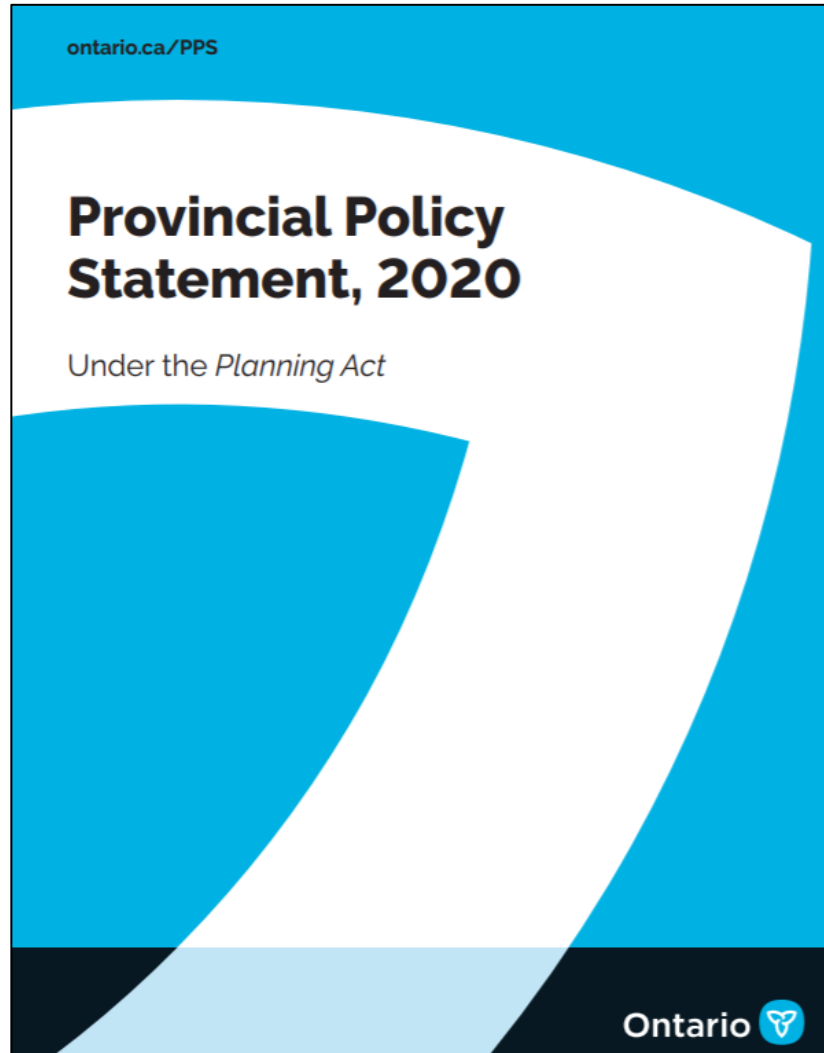


The key tasks to be carried out as part of Phase 2 include:

- Phase 2: The Consultant Team will conduct an updated urban land needs analysis over a 25-year planning horizon – to be completed by **August 2022**.

Municipality of Chatham-Kent Comprehensive Review: Policy Context and Approach

Planning Context



What Drives Population and Employment Growth?



Economics

Local and Regional
Economic Outlook



Economic Drivers of
Population and
Employment Growth by
Area



Labour Force Growth
within the Commuter
Shed



Forecast Employment
Growth by Sector



Demographics

Net Migration and
Natural Increase



Population Forecast by
Age, 2016 to 2051



Housing Forecast by
Type, 2016 to 2051



Allocation of Municipal-
wide Growth Forecast by
Primary and Secondary
Urban Centre and
Remaining Urban Area

Economic Trends and the Changing Nature of Work

Planning for Growth in a Post-COVID Economy

COVID-19 and the Changing Nature of Work



- The economic impacts of COVID-19 on global economic output have been significant. Economic sectors such as travel and tourism, accommodation and food, manufacturing, and energy have been hit particularly hard.
- On the other hand, many other employment sectors (particularly knowledge-based sectors), which are more adaptable to the current remote work environment have been less negatively impacted, and in some cases have prospered.
- In addition to its broader impacts on the economy, COVID-19 has accelerated changes in work and commerce as a result of technological disruptions that were already in play prior to the pandemic.
- The changing nature of work has broad implications on the real estate market and how we plan for residential and non-residential development within our communities.

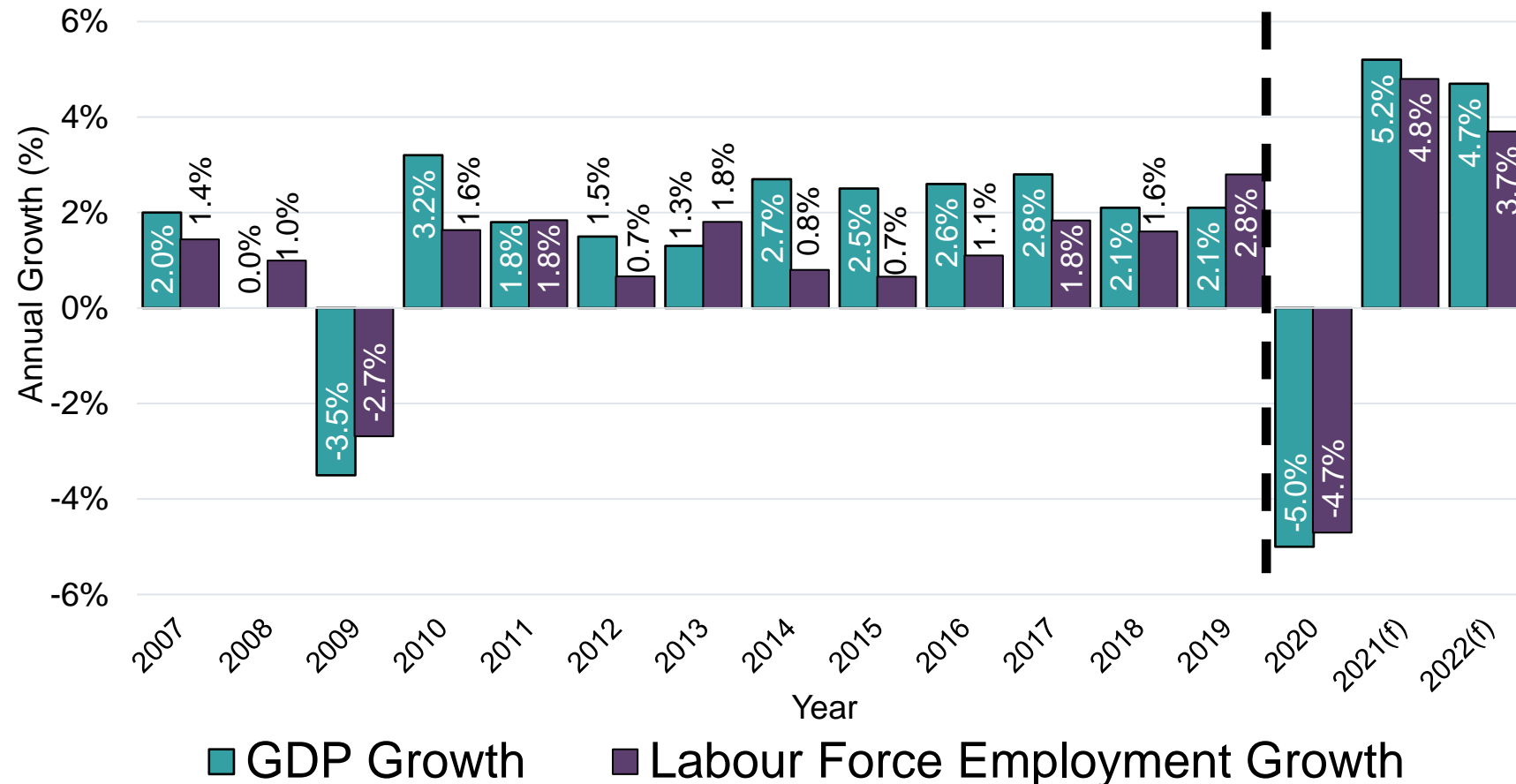
COVID-19 Pandemic Impact

Provincial Economic and Labour Force Disruptions

Ontario



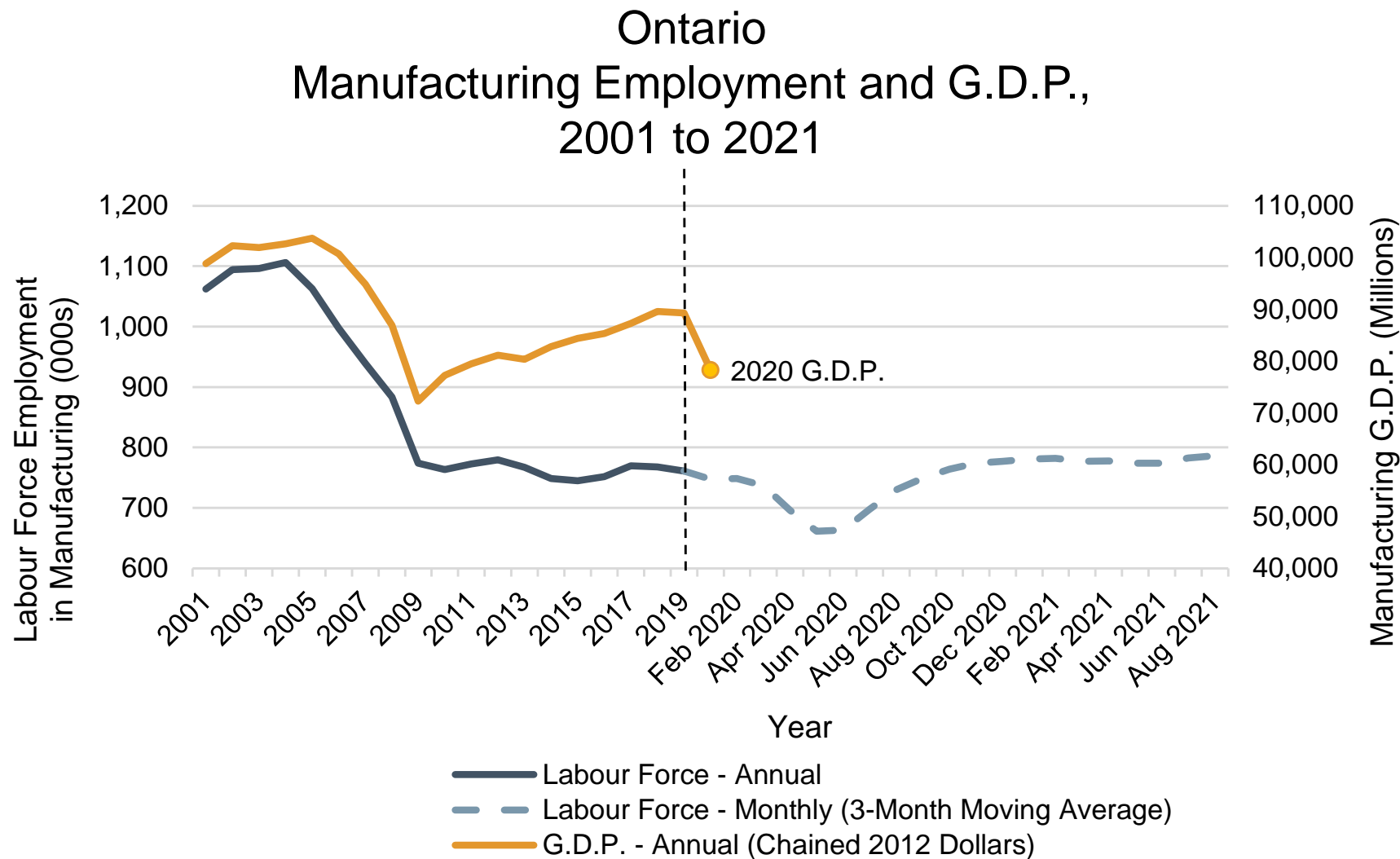
Annual Real G.D.P. and Labour Force Employment Growth, 2007 to 2022



- Pandemic has negatively impacted short-term economic growth.
- Employment levels have largely recovered in 2021.
- Economic rebound has led to notable labour shortages and inflationary pressures.
- Long-term economic growth is expected to remain positive in Ontario.

Planning for Employment Growth in a Post-COVID-19 Economy

Manufacturing Sector



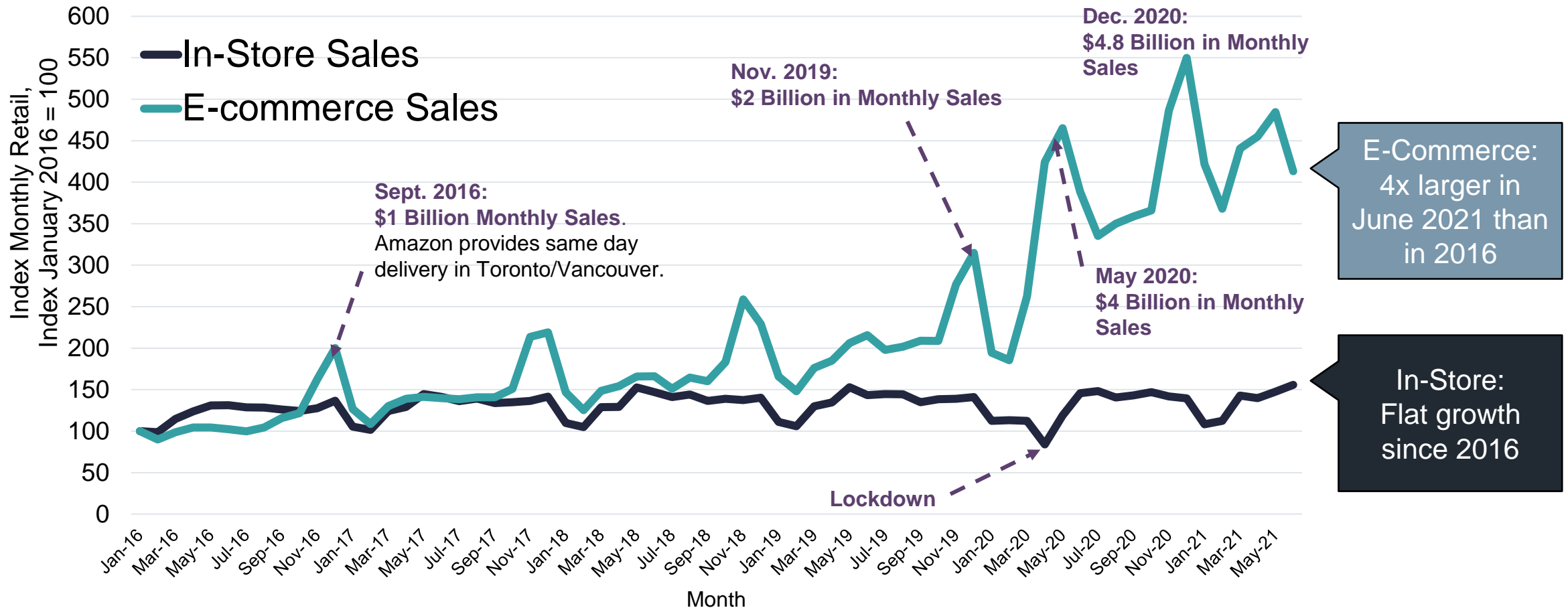
Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, 2020 monthly data from Table 14-10-0091-01, and 2021 monthly data from Table 14-10-0388-01. Annual G.D.P. data from Statistics Canada Table 36-10-0402-01, by Watson & Associates Economists Ltd.

Planning for Employment Growth in a Post-COVID-19 Economy

Retail Market



Indexed Canada Monthly Retail Sales, E-Commerce vs. In-Store,
January 2016 to June 2021, January 2016 = 100.

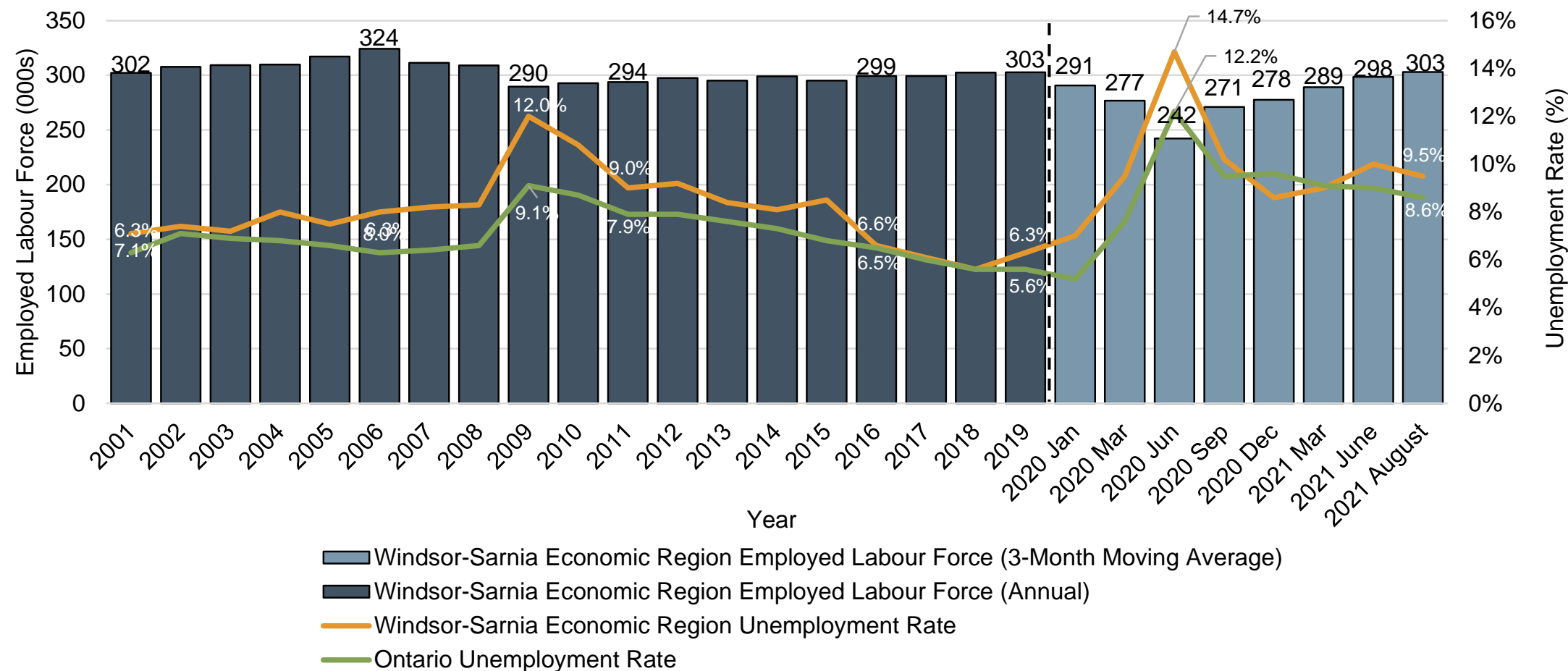


Source: Statistics Canada, Monthly Retail Trade Survey, January 2016 to June 2021.

Note: E-commerce sales includes only domestic retail sales, purchases in Canada on Canadian websites.

Planning for Employment Growth in a Post-COVID-19 Economy

Windsor-Sarnia Economic Regional Labour Force Trends, 2001 to 2021



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

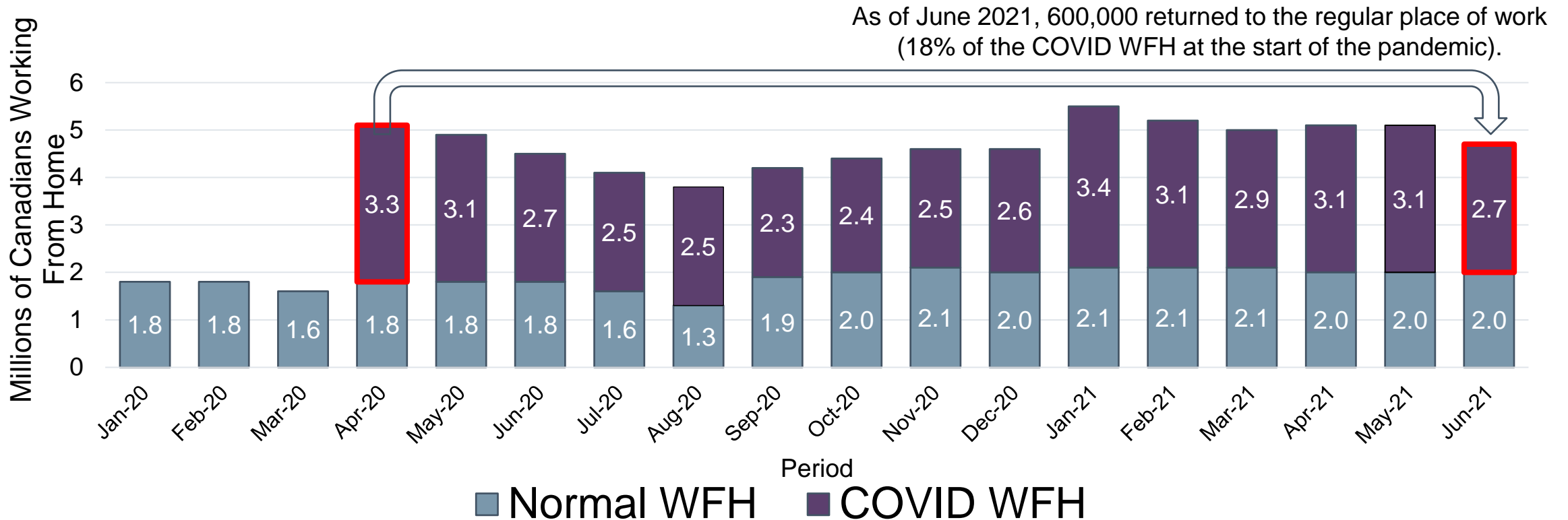
Planning for Employment Growth in a Post-COVID-19 Economy

Work at Home



- Currently, 4.7 million Canadians are working from home, **3x higher** than pre-pandemic levels.

Canada Work from Home Employment, January 2020 to June 2021

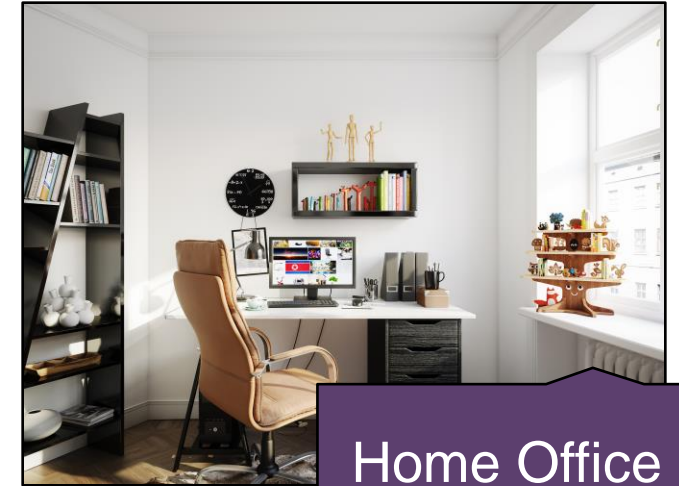


Planning for Employment Growth in a Post-COVID-19 Economy

Work at Home and Hybrid Office



- Trends towards increased remote work and learning, combined with the impacts of e-commerce are anticipated to place downward pressure over the long-term on retail, institutional and office space needs.
- COVID-19 has accelerated housing demand in Chatham-Kent, led by a combination of factors, many which were already in place prior to the pandemic, including:
 - a strengthening regional economy,
 - increase opportunities for remote work and/or hybrid at home/at office work models,
 - and more affordable housing options relative to Central Ontario.



Home Office

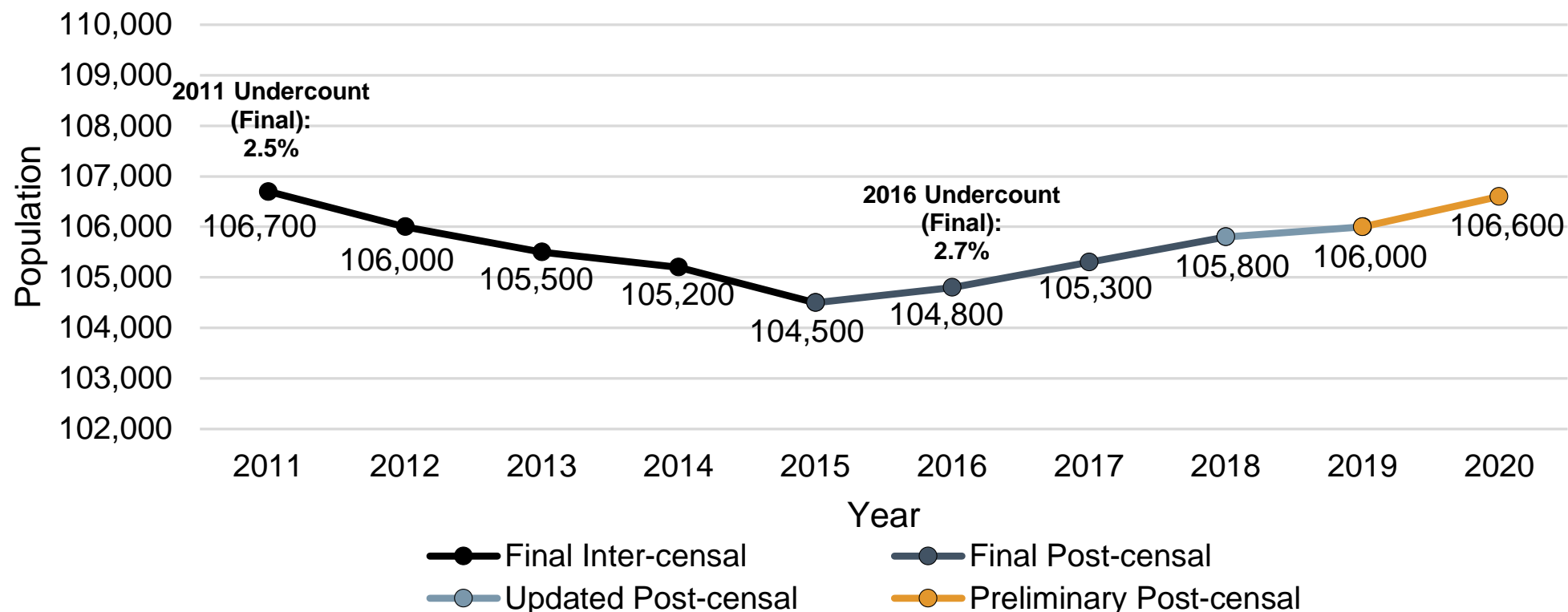


Hybrid Office

Municipality of Chatham-Kent Population Growth Trends

Chatham-Kent Population Growth Trends

Short-Term Population Forecast, 2011 to 2020



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

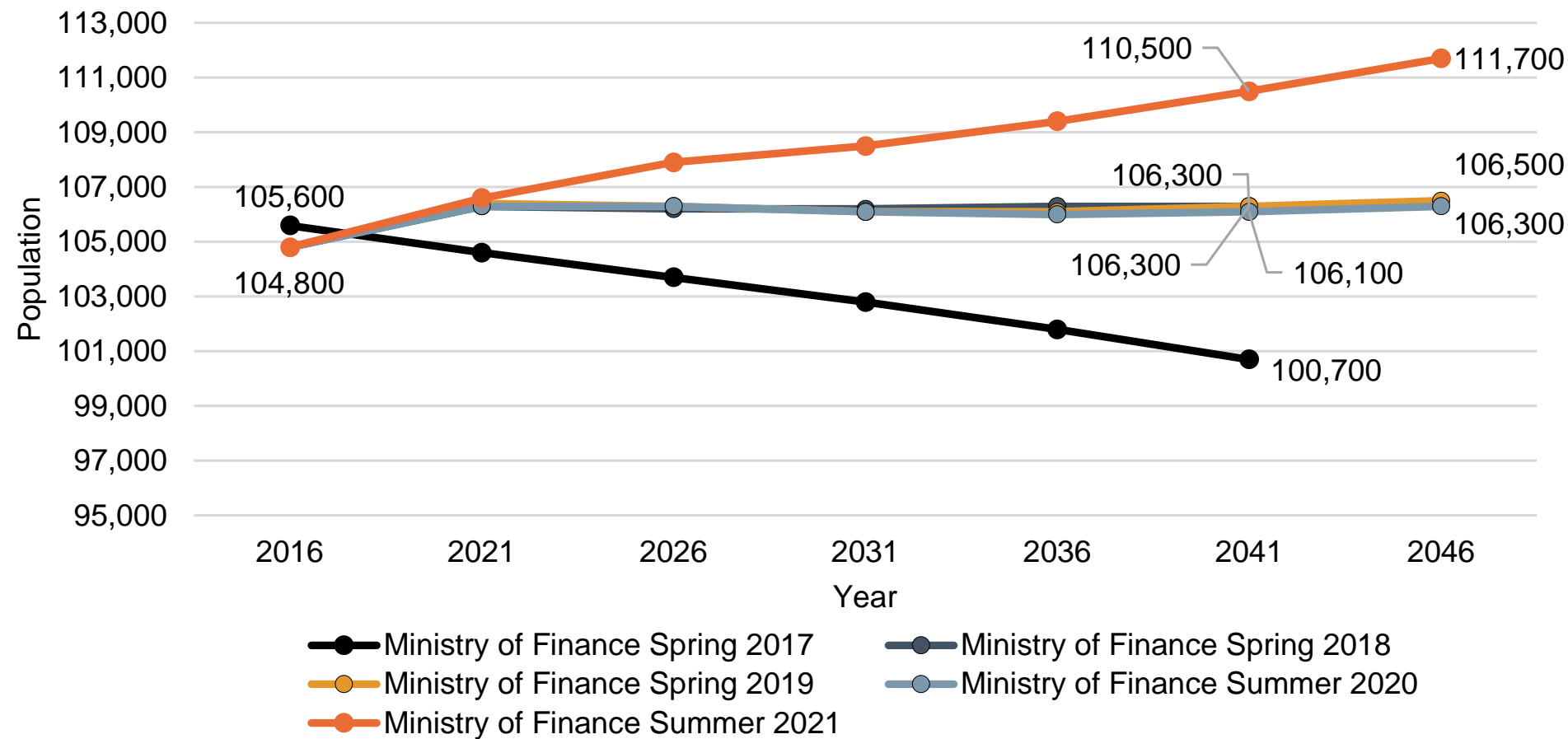
Source: Historical population derived from Statistics Canada Annual Demographic Estimates: Subprovincial Area, by Watson & Associates Economists Ltd.

Chatham-Kent Growth Trends

Ministry of Finance Increasing Population Projections



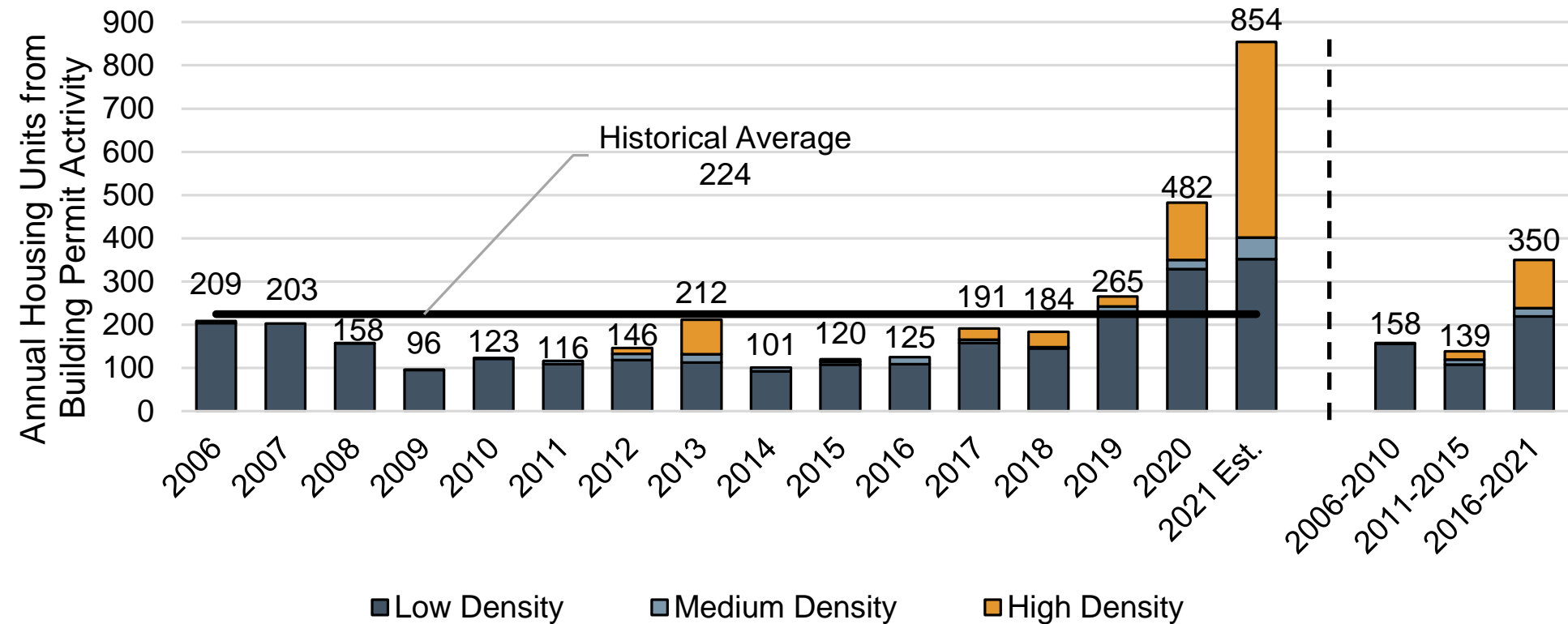
Chatham-Kent Ministry of Finance Population Forecasts



Note: Population includes net Census undercount.
Source: Forecasts adapted from of Finance Population Projections, Spring 2017, Spring 2018, Summer 2019, Summer 2020 and Spring 2021 releases. Figure by Watson & Associates Economists Ltd.

Chatham-Kent Growth Trends

Historical Housing Units from Building Permit Activity, 2006 to 2021



Note:
Low Density includes singles and semis.
Medium density includes townhouses and apartments in duplexes.
High Density includes bachelor, 1-bedroom and 2-bedroom + apartments.
Source: Derived from 2006 to 2020 building permit data provided by the Municipality of Chatham-Kent, and 2021 estimated based on September year-to-date data by Watson & Associates Economist Ltd.

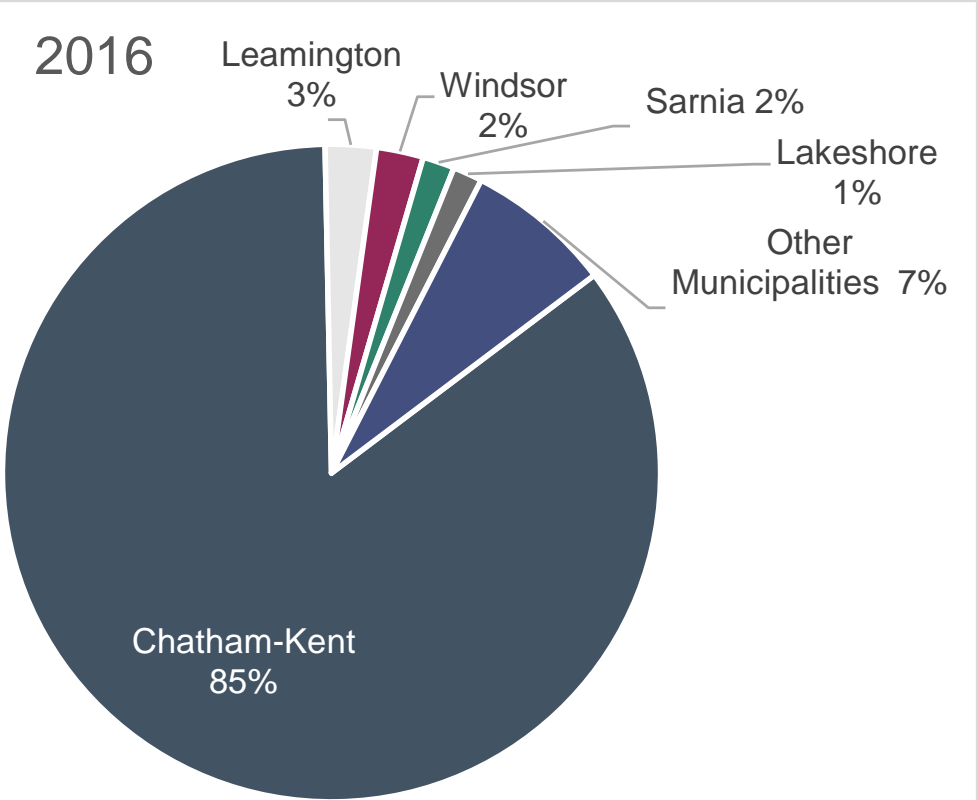
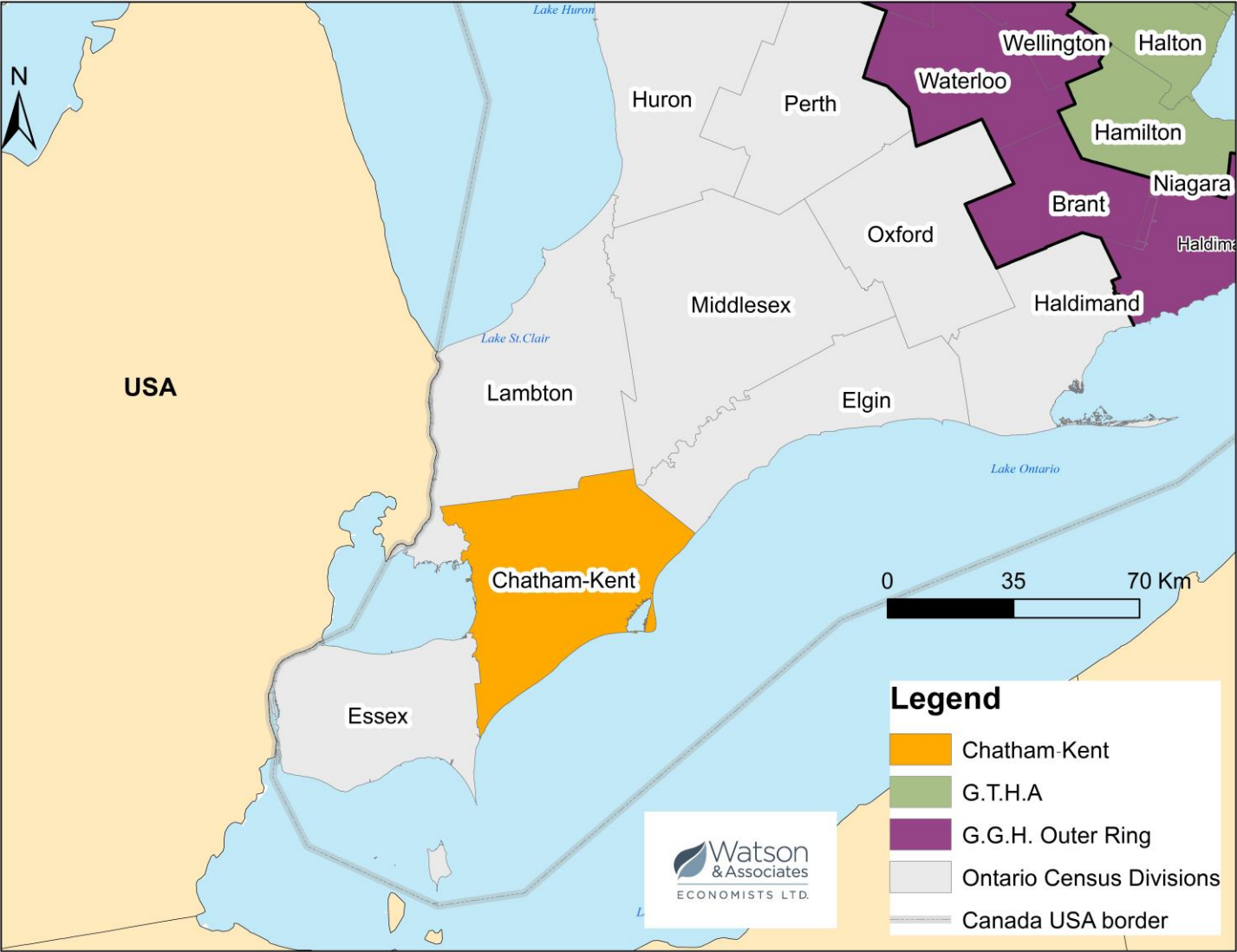
Municipality of Chatham-Kent Growth Drivers and Disruptors

Chatham-Kent Growth Drivers and Disruptors

Employment Opportunities within Chatham-Kent Commuter Shed



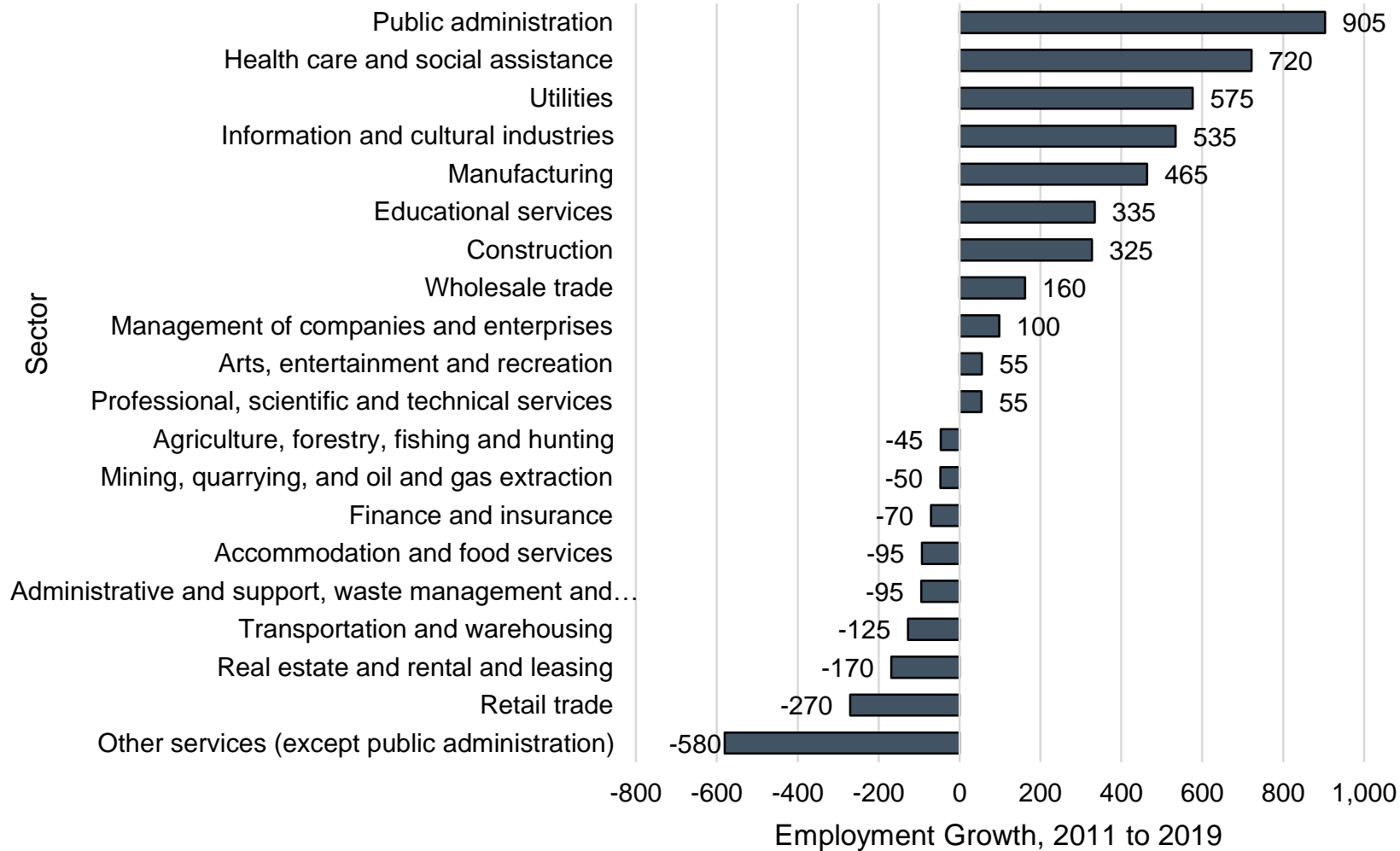
Where Chatham-Kent Residents Commute to Work



Source: Data derived from 2016 Statistics Canada Commuting Flow by Watson & Associates Economists Ltd., 2019.

Chatham-Kent Growth Drivers and Disruptors

Recent Employment Growth Trends in Chatham-Kent, 2011 to 2019

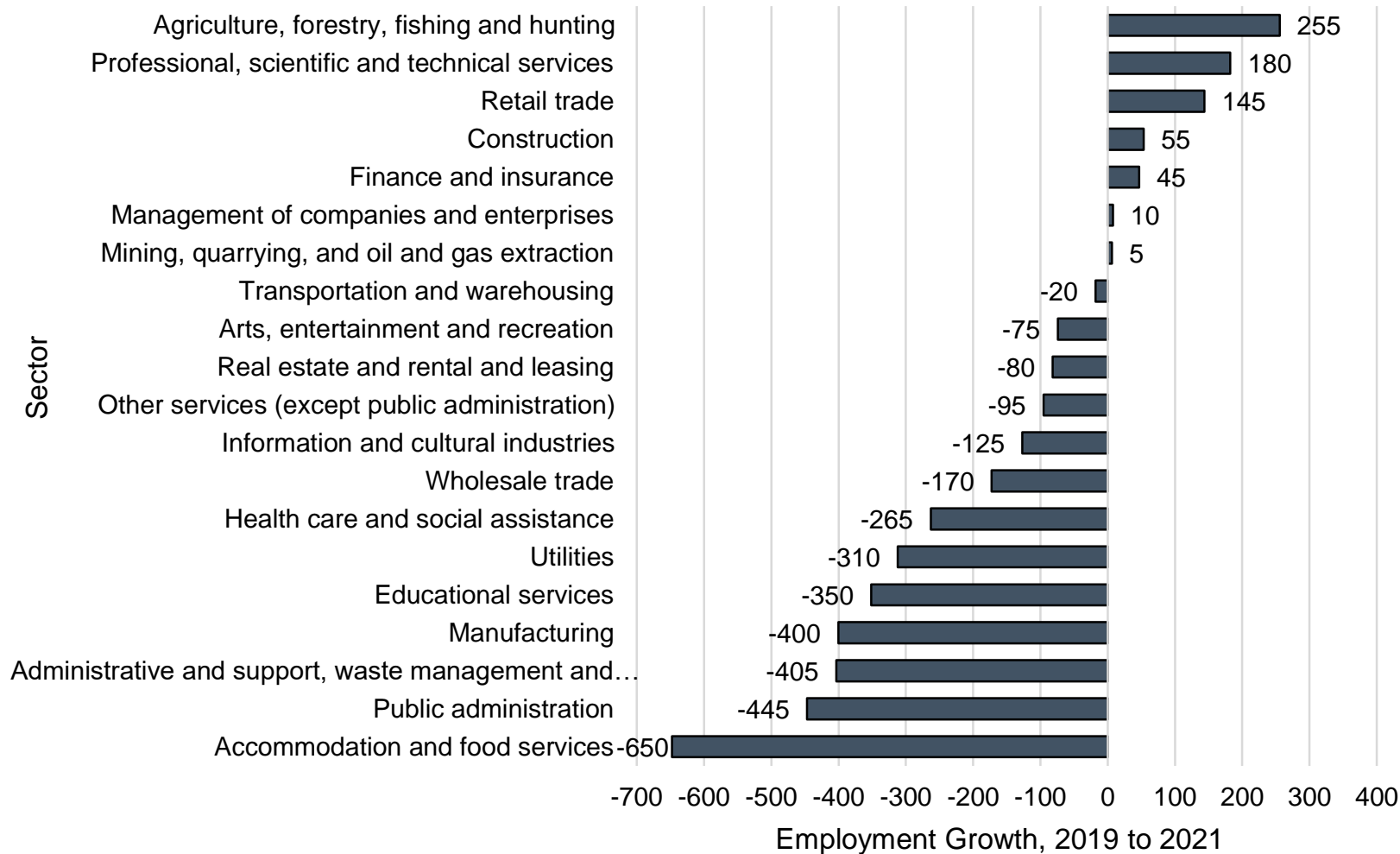


2011 to 2019
total
employment
growth:
2,730 jobs

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

Chatham-Kent Growth Drivers and Disruptors

Recent Employment Growth Trends in Chatham-Kent, 2019 to 2021



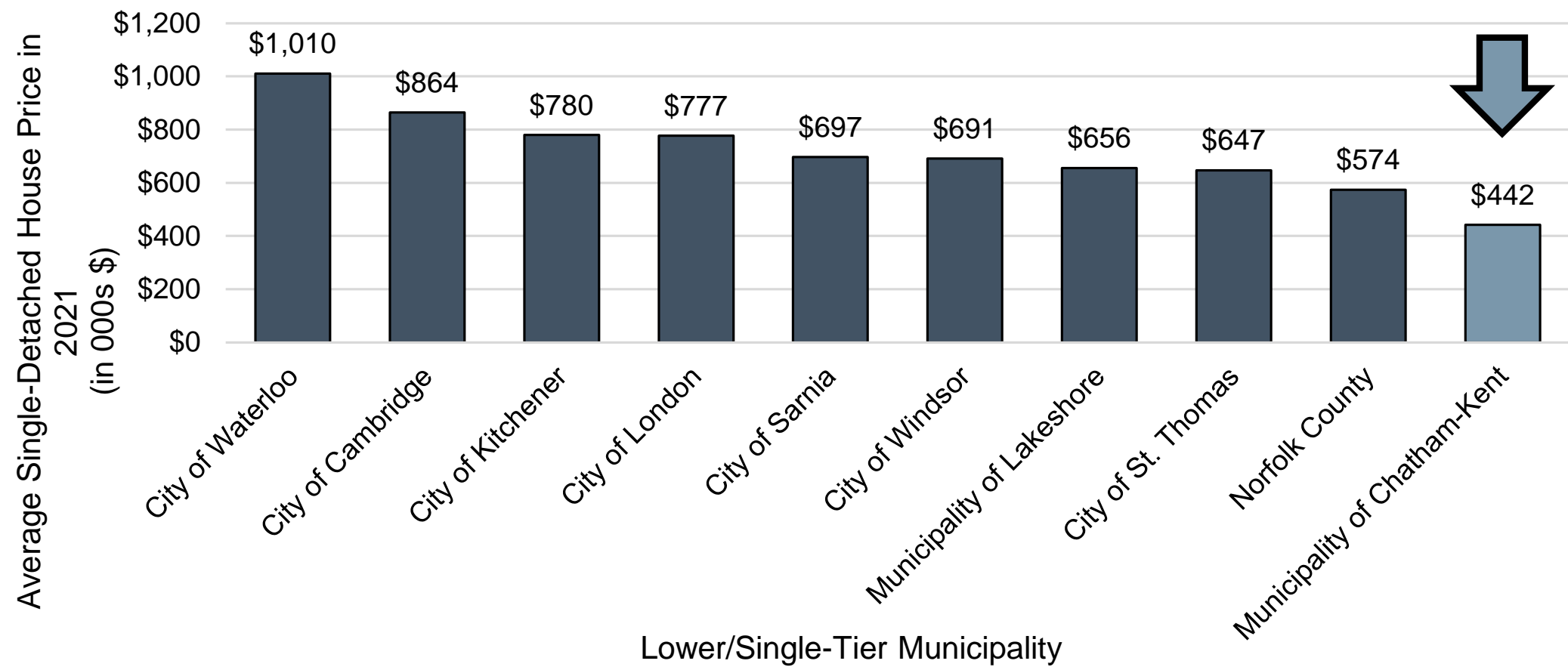
2019 to 2021
total
employment
growth:
-2,700 jobs

Note: Figure includes employees and self-employed jobs. EMSI data may differ from Census data.

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

Chatham-Kent Growth Drivers and Disruptors

Competitive Housing Opportunities



Note: Prices reflect new housing construction absorbed unit prices for 2021 August year-to-date data.
Source: CMHC Market Absorption Survey.

Chatham-Kent Growth Drivers and Disruptors



- **Strategic Geographic Location**

- The strategic geographic location within close proximity to the U.S.A. serves as a draw for businesses and residents.
- Chatham-Kent offers proximity and access to key regional infrastructure assets such as Highway 401 which serves as Canada's major trade corridor and links major urban centres in Ontario and Quebec to the U.S.
- Chatham-Kent's employment lands are centrally located to serve major North American employment markets in southwestern Ontario and the northeastern U.S.

Chatham-Kent Growth Drivers and Disruptors



- **Population Growth of the 55+ Age Group**
 - Applies downward pressure on the rate of population and labour force growth.
 - Drives the need for seniors' housing and other housing forms geared to older adults.
- **Quality of Life**
 - A key factor influencing the location decisions of businesses and residents.
 - Encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities and population diversity.

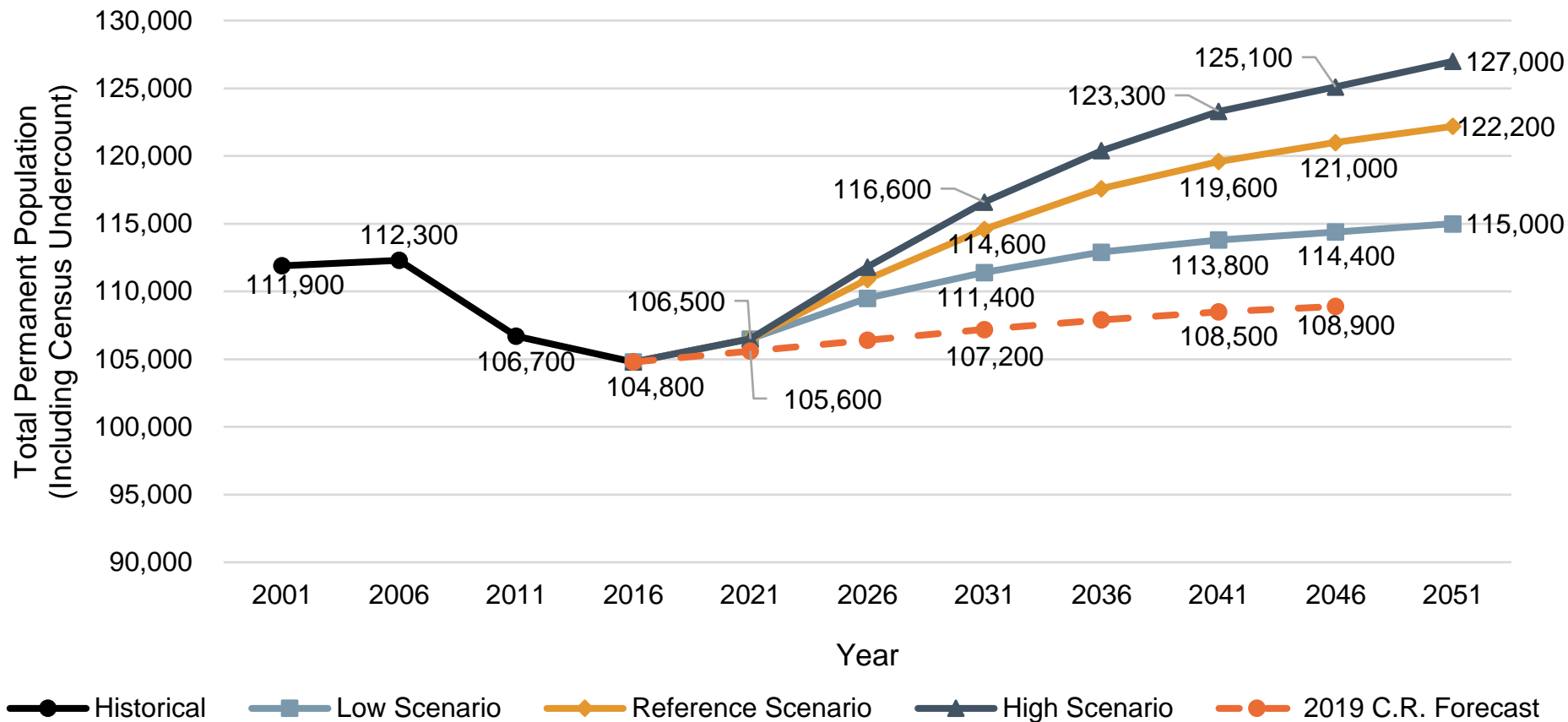
Municipality of Chatham-Kent

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

Chatham-Kent Forecast Permanent Population Scenarios, 2016 to 2051



2016 to 2051 Annual Growth Rates



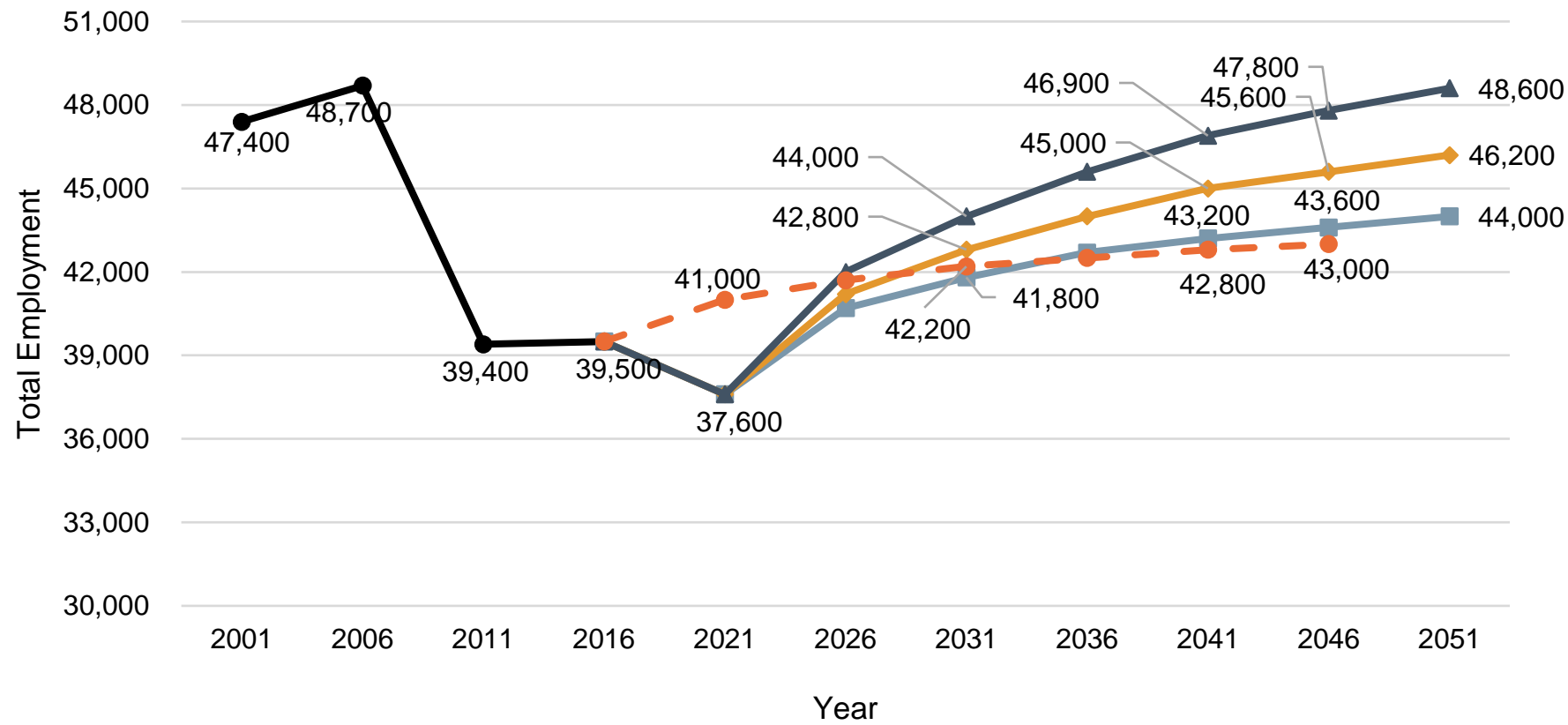
Low Scenario:
0.27%

Reference Scenario:
0.44%

High Scenario:
0.55%

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

Chatham-Kent Forecast Employment Scenarios, 2016 to 2051



● Historical
■ Low Scenario
◆ Reference Scenario
▲ High Scenario
○ 2019 C.R. Forecast

2016 to 2051 Annual Growth Rates

Low Scenario:
0.31%

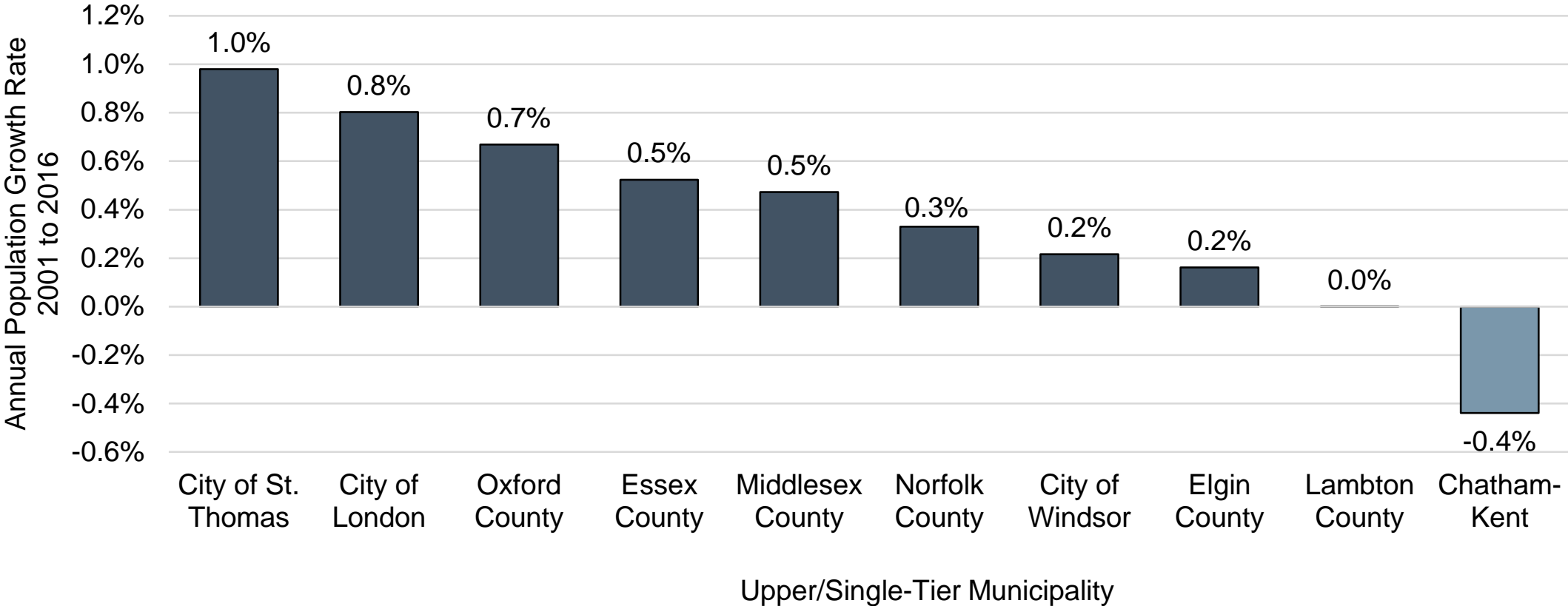
Reference Scenario:
0.45%

High Scenario:
0.59%

Source: Forecast by Watson & Associates Economists Ltd.

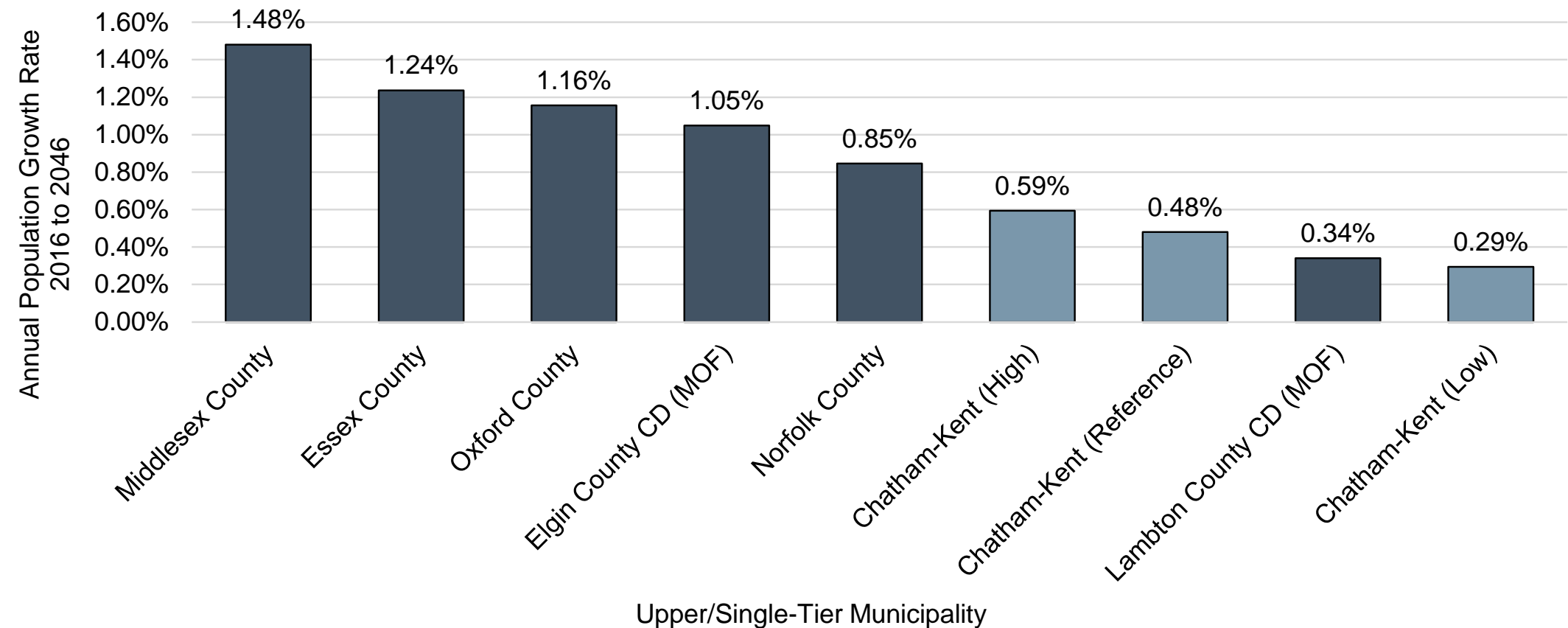
Note: Total employment includes usual place of work and work at home employment. No fixed place of work is not included.

Historical Annual Permanent Population Growth Rate Comparison, 2001 to 2016



Note: Population used to derive growth rates includes net Census undercount.
Source: Derived from Statistics Canada Census (2001 and 2016), by Watson & Associated Economists Ltd.

Annual Permanent Population Forecast Growth Rate Comparison, 2016 to 2046



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

The Ministry of Finance Spring 2021 population projections for Chatham-Kent has an 2016 to 2046 annual population growth rate of 0.21% .

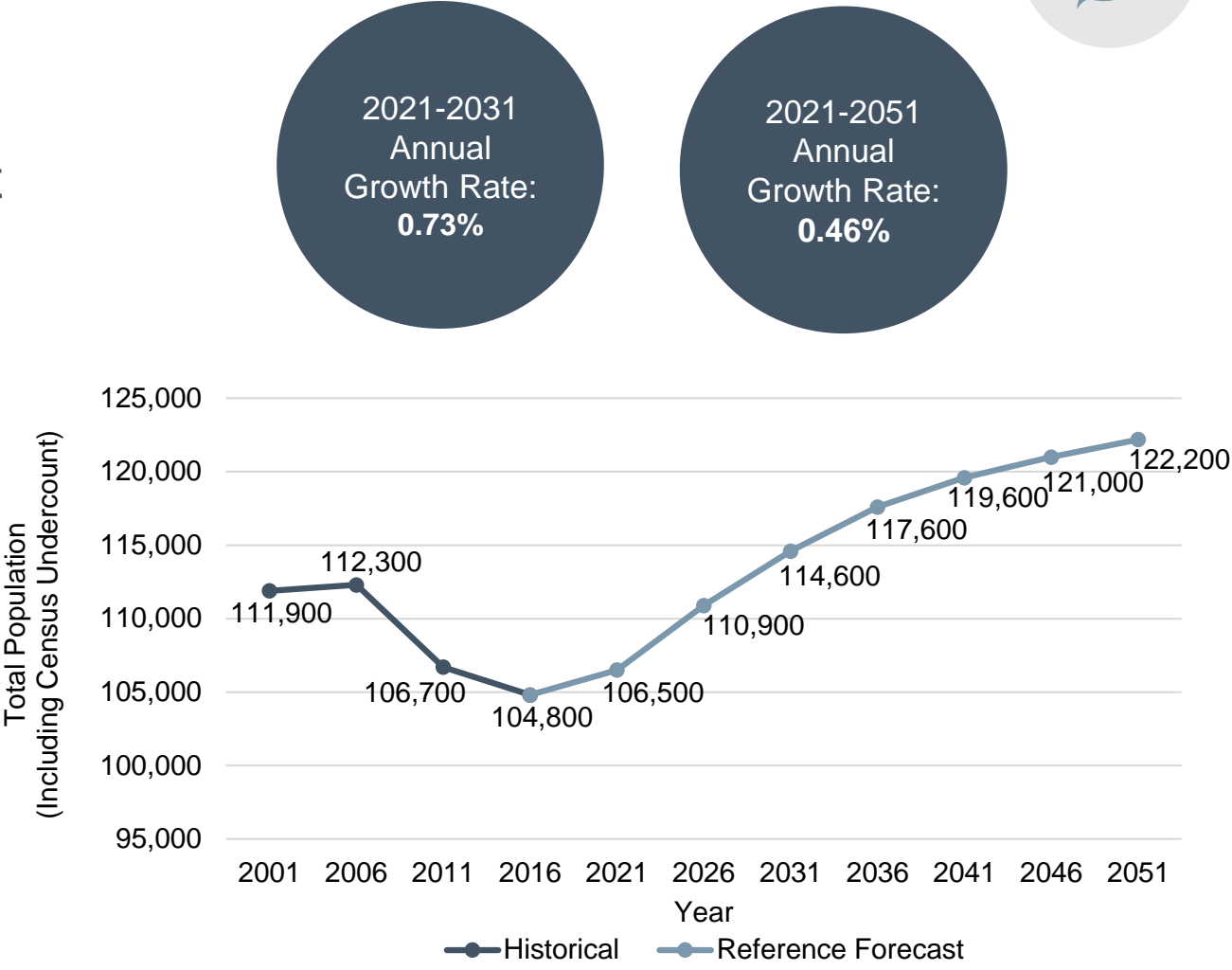
Source: Middlesex County by Watson & Associates Economists Ltd., Oxford County from Oxford County Phase One Comprehensive Review, January 17, 2019, Hemson Consulting Ltd, Elgin County CD (MOF) and Lambton County CD (MOF) from the Ministry of Finance Spring 2021 Population Projections, Norfolk County by Watson & Associates Economists Ltd., and Chatham-Kent by Watson & Associates Economists Ltd.

Chatham-Kent Reference Permanent Population Growth Scenario, 2016 to 2051



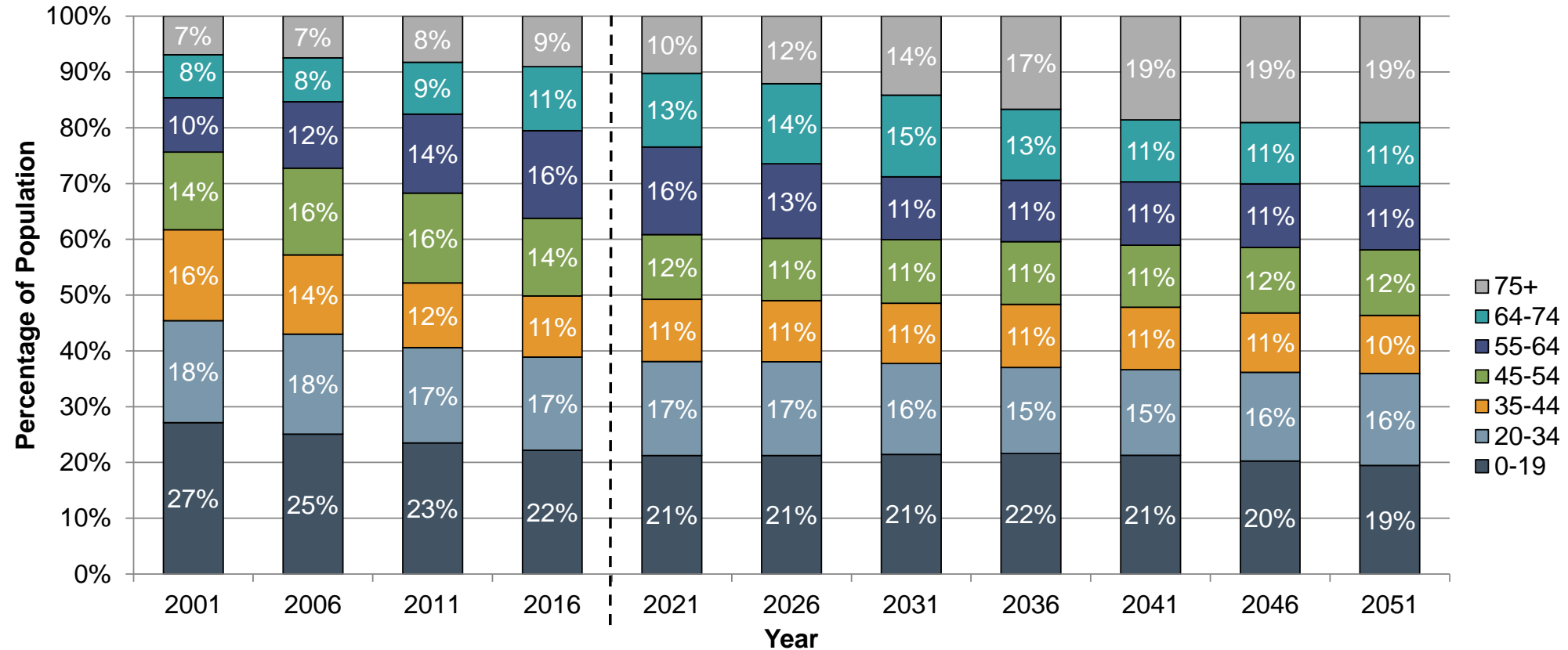
The reference scenario represents the “most likely” scenario for the following reasons:

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



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

Chatham-Kent Permanent Population Forecast by Age, 2016 to 2051

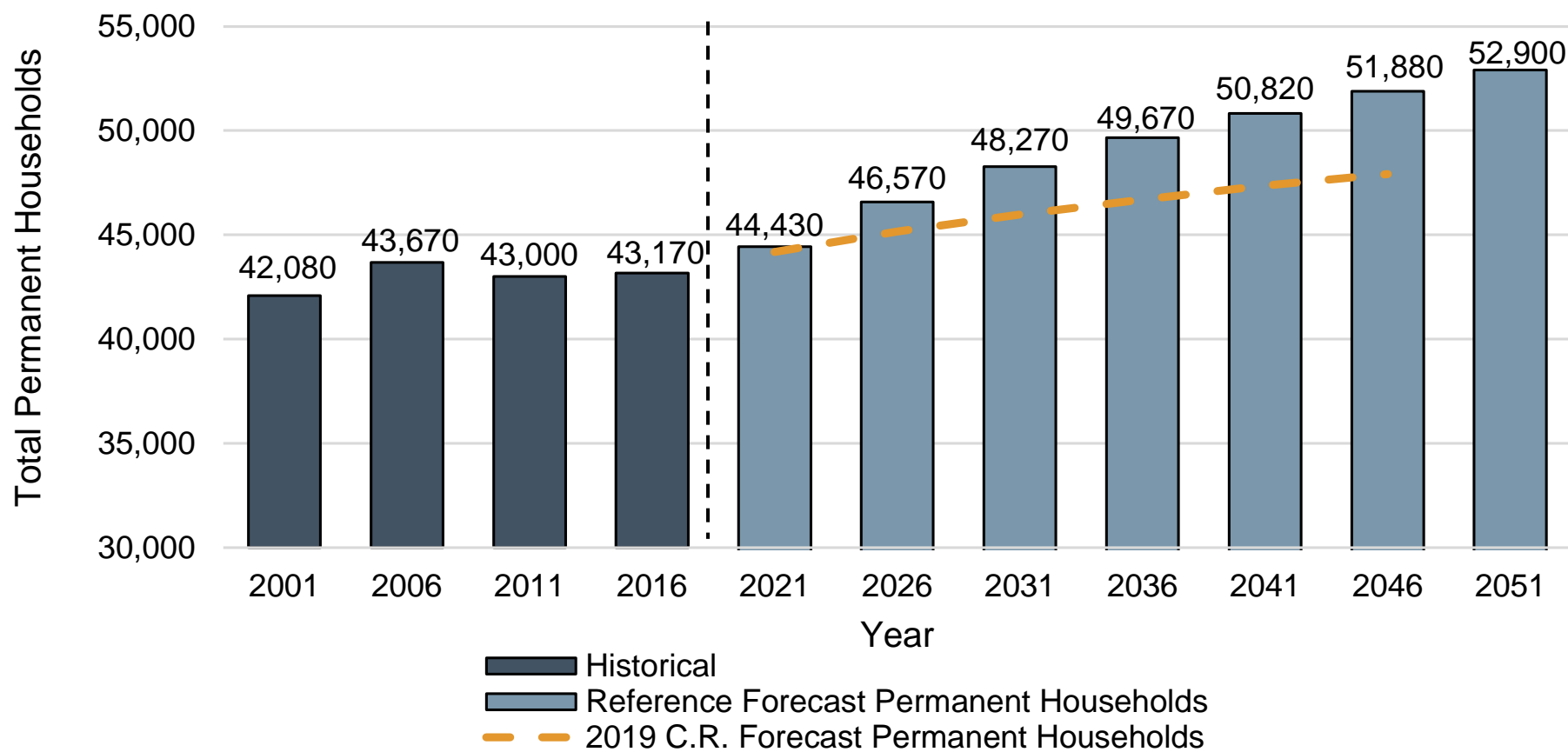


Note: Population includes net Census undercount.

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

- Chatham-Kent's population is aging, between 2016 and 2051 the percentage of persons 75+ years of age or older is forecast more than double.

Chatham-Kent Permanent Housing Forecast, 2016 to 2051

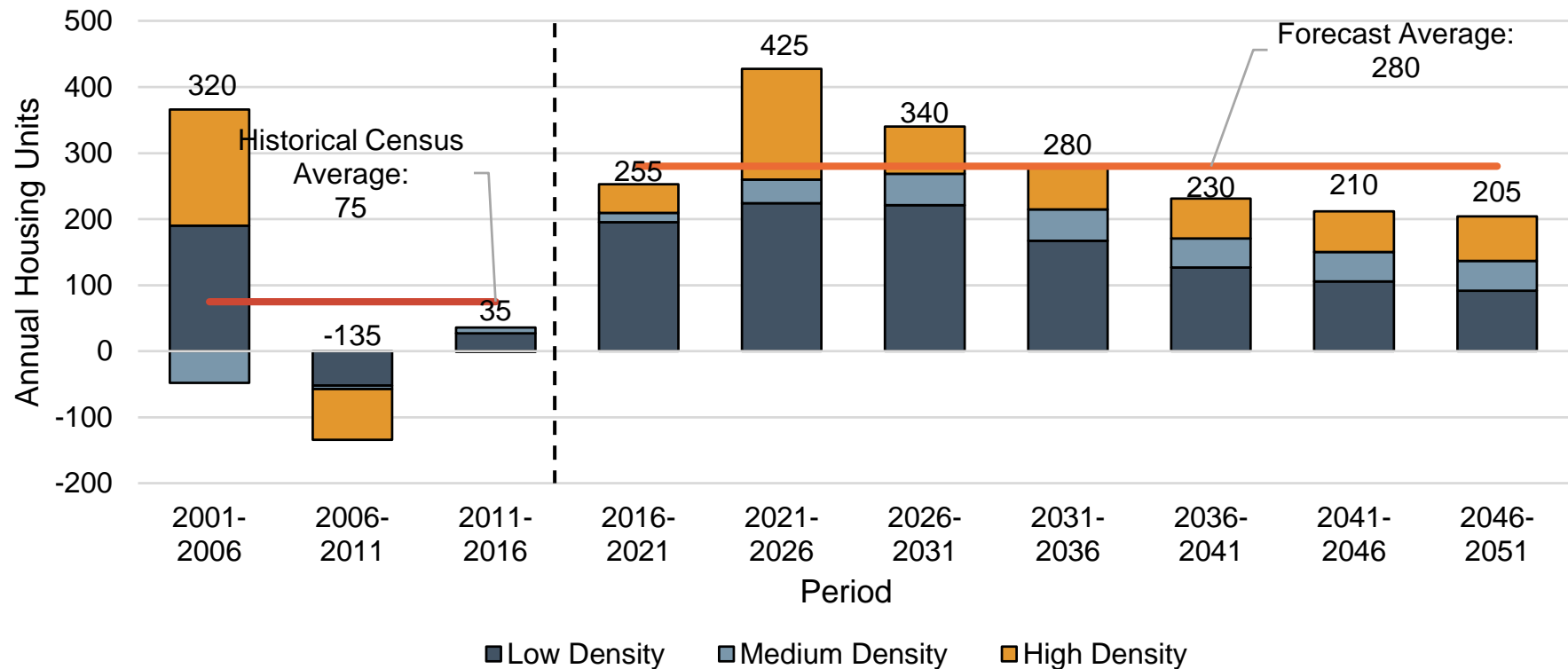


2021 to 2051
total housing
growth:
8,470 units

Additional
5,000 units
by 2046
compared to
2019 C.R.

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

Chatham-Kent Incremental Permanent Housing Growth in New Units, 2016 to 2051



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

Source: 2001 to 2016 derived from Statistics Canada 2001-2016 Census data. 2016 to 2051 by forecasted by Watson & Associates Economist Ltd.

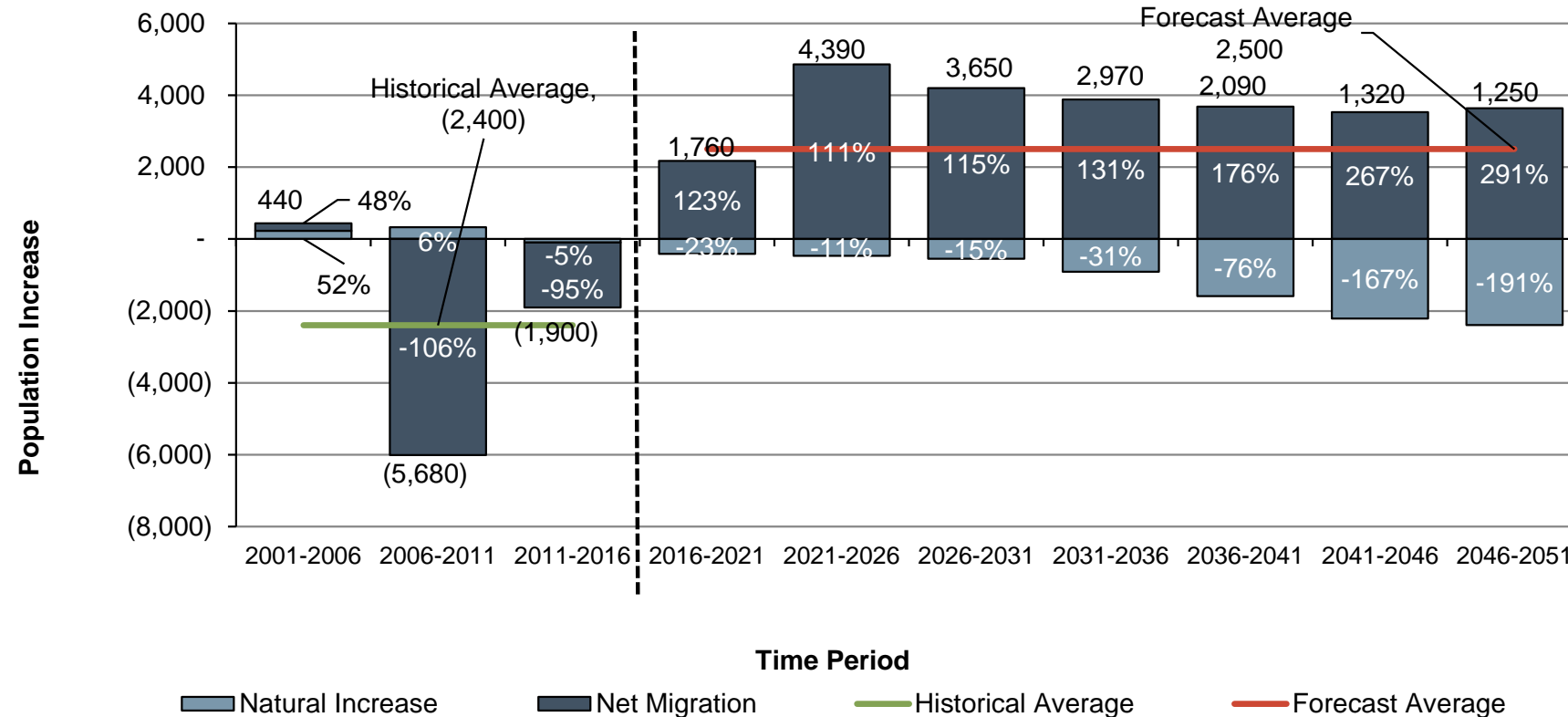
2001 to 2021 total housing growth mix:

Low: 77%
 Medium: -7%
 High: 30%

2021 to 2051 total housing growth mix:

Low: 55%
 Medium: 16%
 High: 29%

Chatham-Kent Components of Permanent Population Growth, 2016 to 2051

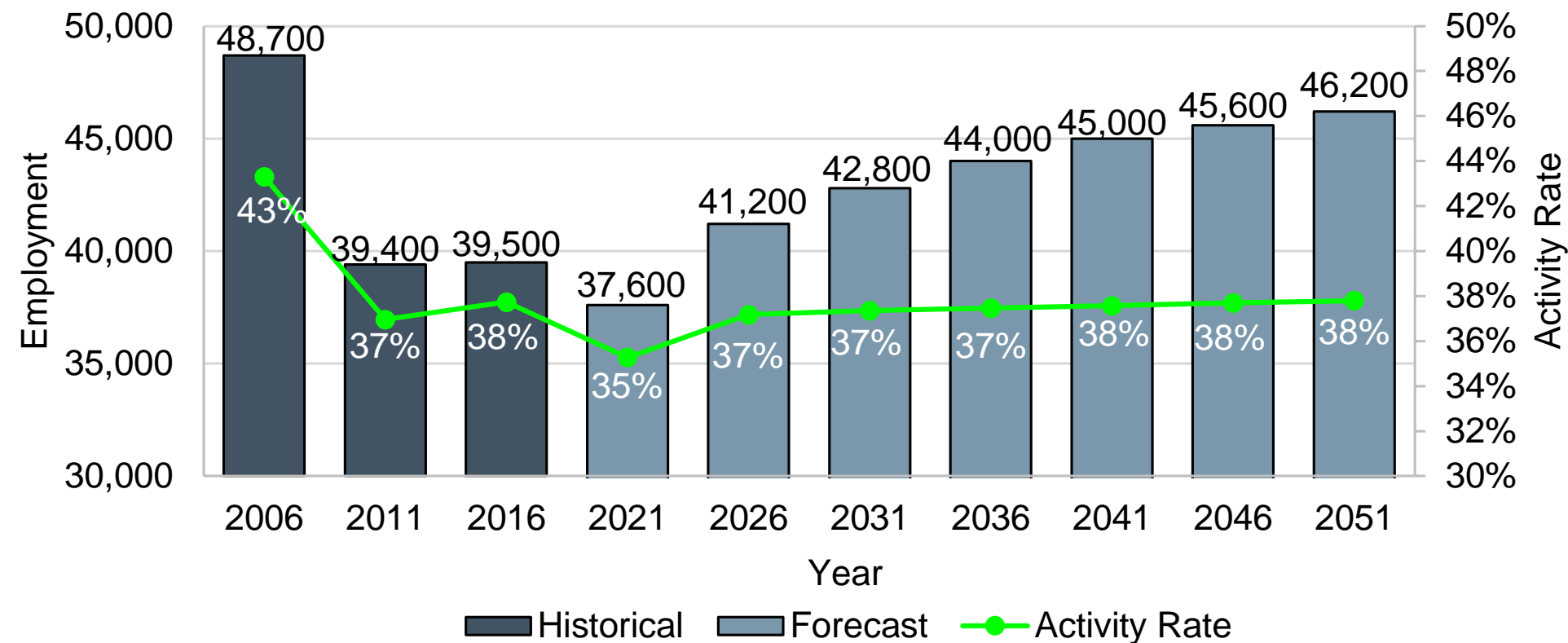


Note: Includes Census undercount of approximately 3%.

Source: Derived from Statistics Canada, Demography Division. 2001-2016 estimated by Watson & Associates Economists Ltd.

- Due to the aging of the population, Chatham-Kent will be more dependent on net-migration as a source of population growth as opposed to population growth from natural increase.

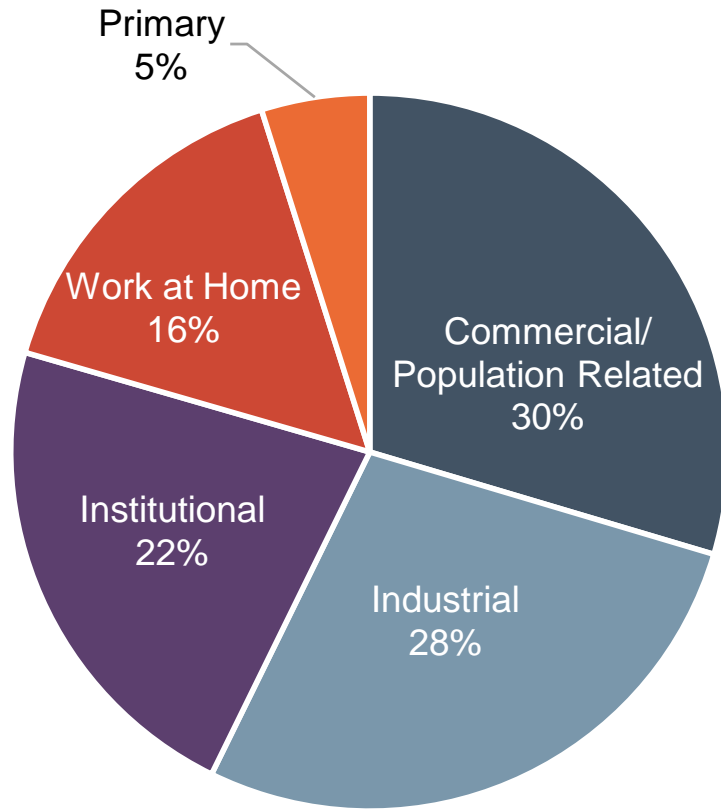
Chatham-Kent Preferred Employment Forecast, 2016 to 2051



2016 to 2051
total
employment
growth:
6,700 jobs

Note: Activity rate is calculated with population including the net Census Undercount. Numbers have been rounded.
Source: 2006 to 2016 from Statistics Canada place of work data including work at home. 2016 to 2051 employment forecast derived by Watson & Associates Economists Ltd.

Chatham-Kent Preferred Employment Forecast by Type, 2016 to 2051



Source: Watson & Associates Economists Ltd.

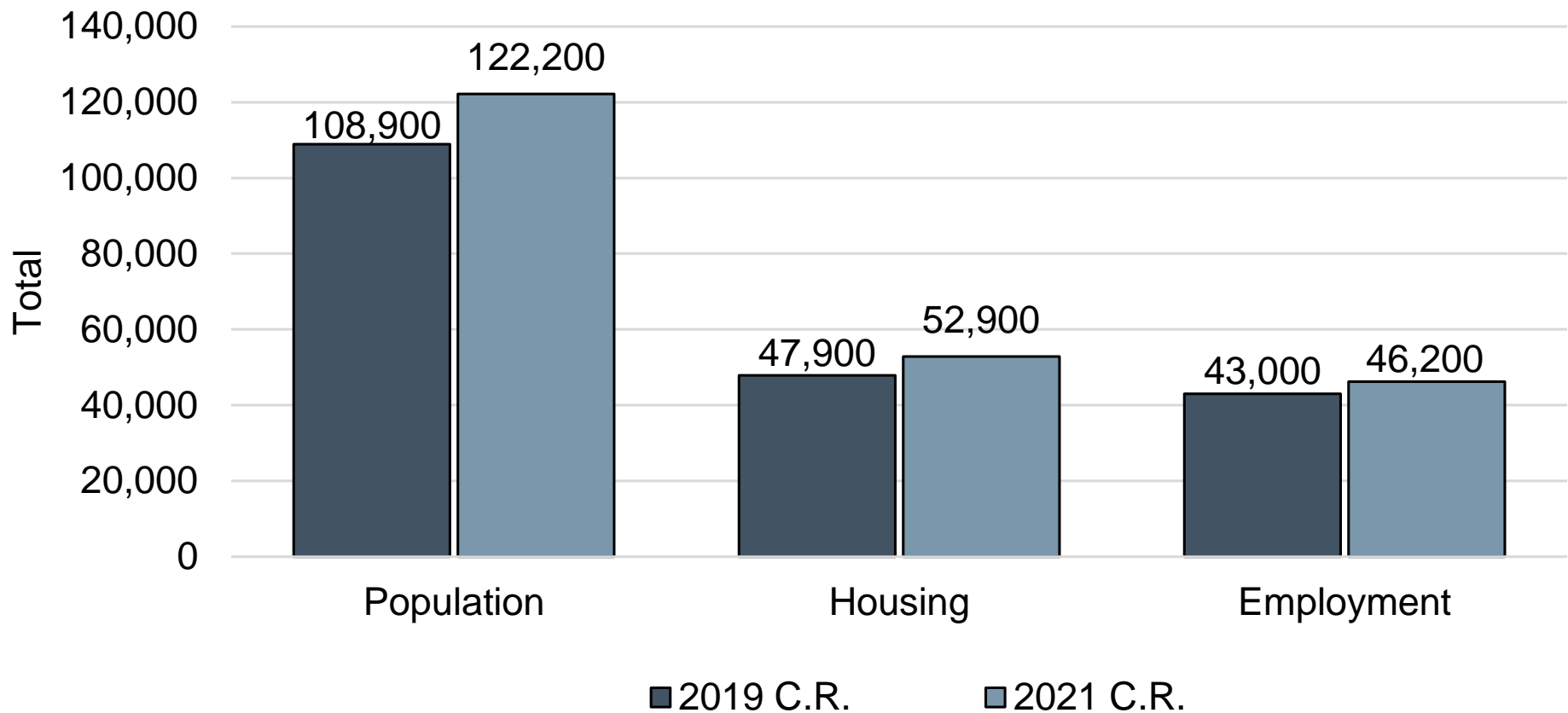
- Forecast employment growth within Chatham-Kent is expected across a range of sectors driven by the continued development of the regional and local economic base and steady local population growth.
- Work at home employees are also anticipated to comprise a growing share of the Municipality's employment base.

Summary of Findings



- Chatham-Kent total permanent population is forecast to increase from 104,800 in 2016 to 122,200 by 2051, representing an increase of 17,400 persons;
- Permanent housing growth is forecast to average 280 new units annually between 2016 to 2051. Comparatively, this represents faster growth than the historical average (75 units annually) achieved between 2001 to 2016;
- The total number of jobs within Chatham-Kent is forecast to increase from 39,500 in 2016 to 46,200 in 2051, with most job growth concentrated in commercial and industrial sectors.

Summary of Findings



Note: Population includes net Census undercount of approximately 3%. Figures have been rounded.
Source: Watson & Associates Economists Ltd.

Thank You

Questions?