



Phase 2: Growth Allocations and Residential Intensification Study

Town of Oakville

Final Report

May 2026

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List of Acronyms and Abbreviations

B.U.A.	Built-Up Area
G.F.A.	Gross Floor Area
G.T.A.	Greater Toronto Area
J.B.P.E.	Joint Best Planning Estimates
M.T.S.A.	Major transit station area
O.P.	Official Plan
O.P.A.	Official Plan Amendment
R.O.P.A. 49	Regional Official Plan Amendment 49
S.G.A.	Strategic Growth Area
sq.ft.	square foot/feet
sq.m	Square metre/metres



Executive Summary

Introduction

Watson & Associates Economists Ltd. (Watson) was retained by the Town of Oakville in 2025 to prepare an updated long-term assessment of the Town's population, housing and employment growth potential to the year 2051. This review was carried out as part of a two-phased approach. Phase 1: Growth Analysis Study reviewed the Halton Region Joint Best Planning Estimates (J.B.P.E.s) and Halton Region Preferred Growth Concept Report, which formed the basis for Regional Official Plan Amendment 49 (R.O.P.A. 49). The Phase 1 report identifies that the long-term population growth outlook envisioned for the Town of Oakville varies considerably between these two previous studies requiring a need to re-examine the Town's near-term and longer-term growth forecasts within the context of broader provincial and regional demographic conditions as well as evolving trends in the housing market and economy. The Phase 1 Growth Analysis Study also includes a detailed growth allocation for Midtown Oakville to further guide ongoing work related to an Official Plan Amendment (O.P.A.) for this area.

This Phase 2 Growth Allocations and Residential Intensification Study builds on the results of the Town's Phase 1 Growth Analysis Study by providing a detailed assessment of potential near-, medium and long-term intensification opportunities to accommodate forecast demand for residential and non-residential development throughout the Town's Strategic Growth Areas (S.G.A.s) to the year 2051 and beyond. In accordance with provincial and Town planning policies, residential development within the Town is focused within S.G.A.s, which include nodes, corridors, and other areas that are identified for accommodating intensification and high-density mixed uses in a more compact built form (refer to section 2.1).

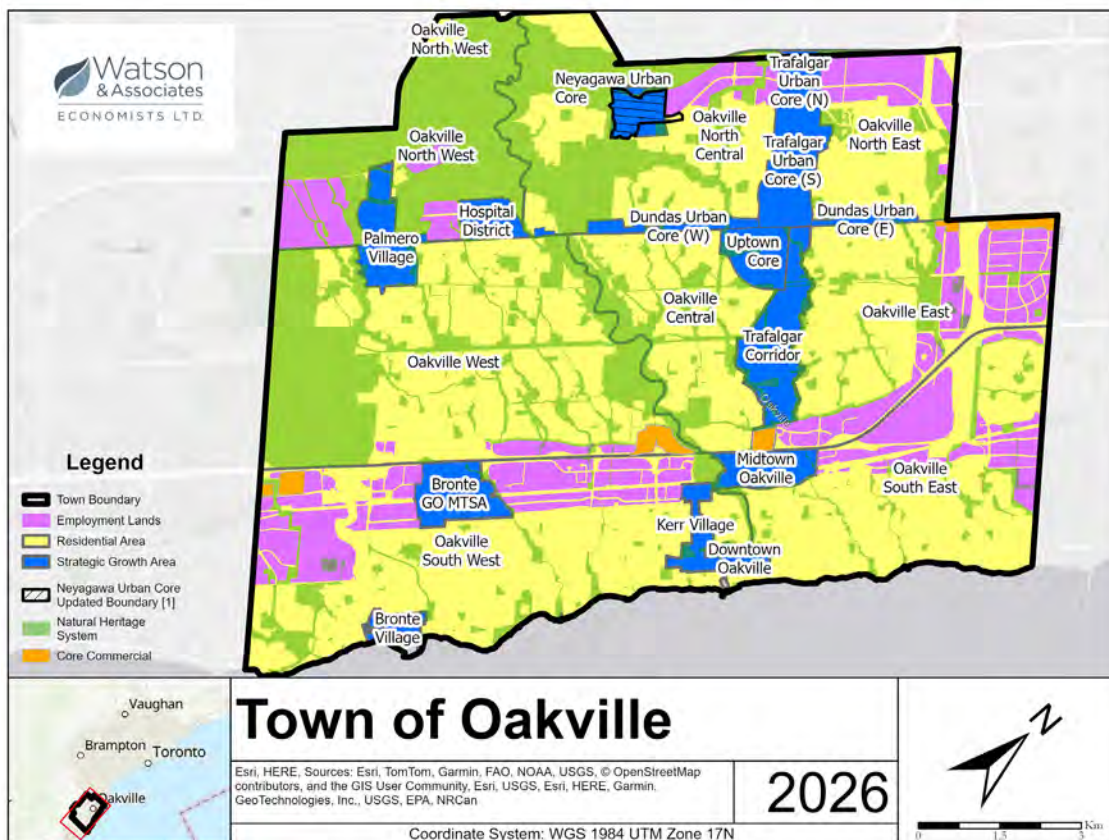
Collectively, the results of these two Growth Analysis studies are designed to serve as key background documents for the Town's Official Plans (O.P.s), providing a foundation for long-term planning, infrastructure needs, financial planning, and other critical decision-making matters. This analysis will also inform a range of active Town projects and studies that will serve as a key input in advancing the Town's planning objectives, based on the most up-to-date information currently available. It is noted that while this report is intended to guide the amount, type, timing, and location of long-term population, housing, and employment growth for the Town, over the long-term, it is not to be used to constrain or set a capacity limit on urban development.



Study Approach

The results of the growth allocation analysis are informed by a detailed review of local supply and demand factors, including intensification potential within S.G.A.s, active development applications, vacant designated urban lands, secondary plan permissions, historical development trends, and forecast market demand in the housing and non-residential real estate market. The analysis aligns with current provincial and local planning policy, including the Livable Oakville Plan as well as the Town's two Secondary Plans for North Oakville. As previously noted, a central component of this study is the evaluation of intensification supply opportunities within the Town's 14 S.G.A.s, which represent the Town's primary locations for accommodating future growth primarily through intensification, as shown in the figure below.

Figure ES-1
Town of Oakville
Strategic Growth Areas



[1] The Neyagawa Urban Core boundary (Case Number: OLT-24-000968, OLT-25-000339) was approved by OLT following the analysis of this study.

Source: Watson & Associates Economists Ltd., based on Town of Oakville G.I.S. data, 2025



Future development opportunities for each S.G.A. were assessed on a site-by-site basis to identify vacant lands, approved applications, and redevelopment opportunities, while accounting for physical constraints, heritage considerations, infrastructure requirements, and parkland needs. Conservative assumptions were applied, including minimum take-out factors for parkland and rights-of-way, and future housing yields to support a diverse range of housing forms and compatible transitions to surrounding neighbourhoods.

The analysis concludes that Oakville's S.G.A.s have the potential to accommodate approximately 79,950 housing units and 2.36 million square metres (sq.m) of non-residential gross floor area (G.F.A.). High-density housing represents approximately 79% of the total unit potential, with medium-density forms accounting for about 21%. This identified residential intensification base aligns with planning policy direction to concentrate growth in transit-supportive, mixed-use environments. Areas such as Midtown Oakville and the Trafalgar Urban Core areas (North and South) represent the largest share of intensification capacity, together accounting for approximately 62% of the total housing potential within S.G.A.s.

Non-residential intensification is structured to maintain and evolve Oakville's commercial and employment base as development transitions from auto-oriented formats to more compact, pedestrian-oriented mixed-use forms. S.G.A.s, including Uptown Core, Palermo Village, and Neyagawa Urban Core, play important roles in delivering medium-density housing and complete community outcomes, while areas such as the Bronte GO M.T.S.A. and the Hospital District are expected to accommodate a greater share of non-residential and employment-focused development, reflecting their planned roles as employment and institutional hubs.

Population, Housing, and Employment Allocations, 2025 to 2051

Recent development trends demonstrate a growing concentration of residential activity within S.G.A.s, which accounted for approximately 57% of new housing units constructed between 2011 and 2024. Figures ES-1 and ES-2 summarize the Town of Oakville's long-term population and employment forecast with S.G.A.s, Residential Areas, Employment Lands, and Commercial Areas. Key findings include:

- Between 2025 and 2051, the Town of Oakville is forecast to accommodate approximately 159,600 new residents, 68,100 new housing units, and 70,900 new jobs, with growth strategically directed to support compact, transit-oriented, and complete communities;



- The Town's S.G.A.s are forecast to accommodate the majority of future residential growth, including approximately 59% of population growth (93,900 people) and 66% of housing growth (39,440 units), reflecting their role as the Town's primary intensification and mixed-use areas.
- Over the next three decades, the Town of Oakville is projected to grow at an average annual rate of 1.9%, with S.G.A.s growing at 4.7% annually and Residential Areas growing at a rate of 1.0% annually. By comparison, the J.B.P.E.s assume a higher annual growth rate of 6.0% within S.G.A.s, while growth within Residential Areas remains generally consistent.
- The Residential Areas are forecast to accommodate the remaining 41% of population growth (65,600 people) and 34% of housing growth (20,080 units), including nearly all low-density housing.
- Employment growth is more broadly distributed, with employment lands expected to accommodate approximately 44% of new jobs (31,300 jobs), S.G.A.s accommodating 39% (28,000 jobs), and the balance occurring within Residential and Commercial Areas through population-related employment.
- Collectively, these allocations align growth with existing and planned infrastructure, reinforce major transit nodes and employment hubs, and support the Town's long-term planning objectives to 2051.



ES-2
Town of Oakville
Population Growth by Policy Area, 2025 to 2051

Policy Area	Growth Area	Population Growth ^[1]	Percentage Share of Population
Strategic Growth Areas	Bronte GO M.T.S.A. Bronte Village Downtown Oakville Dundas Urban Core East Dundas Urban Core West Hospital District Kerr Village Midtown Oakville Neyagawa Urban Core Palermo Village Trafalgar Corridor Trafalgar Urban Core (N) Trafalgar Urban Core (S) Uptown Core ^[2]	93,900	59%
Residential Areas	Oakville Central Oakville East Oakville North Central Oakville North East Oakville North West Oakville South East Oakville South West Oakville West	65,600	41%
Town of Oakville	-	159,600	100%

^[1] Population figures include net Census undercount.

^[2] Please note that due to different boundaries, the total population estimated in the Uptown Core Growth Area review differs from what is presented herein.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Forecast summarized by Watson & Associates Economists Ltd.



Figure ES-3
Town of Oakville
Employment Area Growth by Development Area, 2025 to 2051

Development Area	Growth Areas	Employment Growth ^[1]	% Share of Town of Oakville
Strategic Growth Area	Bronte GO M.T.S.A. Bronte Village Downtown Oakville Dundas Urban Core East Dundas Urban Core West Hospital District Kerr Village Midtown Oakville Neyagawa Urban Core Palermo Village Trafalgar Corridor Trafalgar Urban Core (N) Trafalgar Urban Core (S) Uptown Core ^[2]	28,000	39%
Residential Areas	Oakville Central Oakville East Oakville North Central Oakville North East Oakville North West Oakville South East Oakville South West Oakville West	10,500	15%
Commercial Area ^[3]	-	1,100	2%
Employment Lands ^[4]	Employment Areas Employment Generating and Supporting Areas	31,300	44%
Town of Oakville	-	70,900	100%

^[1] Employment figures include work at home and no fixed place of work.

^[2] Please note that, due to different boundaries, the employment estimates in the Uptown Core Growth Area review differ from those presented herein.

^[3] Please refer to Figure 1.

^[4] Employment lands are made up of two designations: Employment Area and Employment Generating and Supporting Area. The Employment Areas are located along the provincial highways, including the Queen Elizabeth Way, Highway 403, and Highway 407.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Forecast summarized by Watson & Associates Economists Ltd.



Conclusions

As identified in the Phase 1 Growth Analysis Study, achieving the Town's recommended longer-term population forecast will require a broad range of housing options by location, structure type/density and affordability to accommodate a growing and diverse population base by household type, size, income and age. Building on this direction, the results of this study emphasize the importance of encouraging, where appropriate, "missing middle" housing typologies throughout the Town's remaining greenfield Residential Areas Strategic Growth Areas (SGAs), including townhouses, stacked townhouses, and low-rise apartments. These housing forms contribute to gentle density, support affordability, and help diversify the Town's housing supply to meet the needs of a growing and evolving population.

In striking this balance by housing form and density, it is important to distinguish between built forms that may fall within similar density classifications but differ significantly in their ability to achieve broader growth management objectives. While stacked townhouses are often categorized as high-density housing, they generally provide lower resident- and job-generating potential compared to apartment buildings, which can exceed four to five storeys and accommodate a mix of residential, commercial, and office uses. As such, apartment forms should remain the primary means of achieving planned density targets within S.G.A.s, particularly in locations critical to supporting higher-order transit. Stacked townhouses should not be considered a substitute in areas where maximizing density is essential.

In this context, the encouragement of medium-density housing should be carefully framed and spatially defined. As the Town approaches the limits of its greenfield land supply, S.G.A.s must retain sufficient capacity to accommodate long-term high-density residential and employment growth. While medium-density forms play an important role in providing housing choice and market flexibility, their broad or unstructured application within S.G.A.s risks precluding the achievement of density targets necessary to support higher-order transit, both in the near term and over the 2051 planning horizon. Accordingly, medium-density housing should be directed to appropriate locations within S.G.A.s that do not compromise the long-term intensification objectives of key transit-supportive areas.



This Phase 2 Growth Allocations and Residential Intensification Study confirms that Oakville has a sufficient land supply and intensification potential in low-, medium- and high-density housing forms to accommodate forecast housing growth to the year 2051, and beyond, in a manner that aligns anticipated market demand with the Town's policy objectives for compact, transit-oriented, and complete communities. Overall, this study provides a strong foundation for implementing the Town's O.P. policies. It also provides direction to the Town's infrastructure and servicing strategies, financial planning, and ongoing growth monitoring efforts. The findings of this study will assist the Town in coordinating growth-related decisions across multiple initiatives and in responding to evolving policy directions.

Importantly, this study recognizes that Oakville's land use and urban structure plan must accommodate growth well beyond the 2051 planning horizon. The Town's relatively fixed urban boundaries underscore the need for a robust urban structure policy framework that supports ongoing growth and maturation over time, while balancing residential and non-residential land uses and discouraging the removal of Employment Areas to accommodate non-employment land uses. Existing residents and newcomers moving to Oakville will find ample housing opportunities to accommodate their housing needs for the coming decades, not only within S.G.A.s but also in developing greenfield areas and through intensification in established Residential Areas.



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson) was retained by the Town of Oakville in 2025 to prepare an updated long-term assessment of the Town's population, housing and employment growth potential to the year 2051. This review was carried out as part of a two-phased approach. Phase 1: Growth Analysis Study reviewed the Halton Region Joint Best Planning Estimates (J.B.P.E.s) and Halton Region Preferred Growth Concept Report, which formed the basis for Regional Official Plan Amendment 49 (R.O.P.A. 49), refer to Appendix A for a summary of these residential and non-residential growth forecasts. The Phase 1 report identifies that the long-term population growth outlook envisioned for the Town of Oakville varies considerably between these two previous studies, requiring a need to re-examine the Town's near-term and longer-term growth forecasts within the context of broader provincial and regional demographic conditions as well as evolving trends in the housing market and economy. The Phase 1 Growth Analysis Study also includes a detailed growth allocation for Midtown Oakville to further guide ongoing work related to an Official Plan Amendment (O.P.A.) for this area.

This Phase 2 Growth Allocations and Residential Intensification Study builds on the results of the Town's Phase 1 Growth Analysis Study by providing a detailed assessment of potential near-, medium and long-term intensification opportunities to accommodate forecast demand for residential and non-residential development throughout the Town's Strategic Growth Areas (S.G.A.s) to the year 2051 and beyond.. In accordance with provincial and Town planning policies, residential development within the Town is focused within S.G.A.s, which include nodes, corridors, and other areas that are identified for accommodating intensification and high-density mixed uses in a more compact built form (refer to section 2.1).

Collectively, the results of these two Growth Analysis studies are intended to serve as key background documents for the Town's Official Plan (O.P.) and Secondary Plans, providing a foundation for long-term planning, infrastructure needs, financial planning, and other critical decision-making. Furthermore, this analysis will inform a range of active Town projects and studies, serving as a key input to advancing the Town's planning objectives, based on the most up-to-date information currently available. It is noted that while this report is intended to guide the amount, type, timing, and location of



long-term population, housing, and employment growth for the Town, over the long-term, it is not to be used to constrain or set a capacity limit on urban development.



2. Intensification Supply Opportunities within the Strategic Growth Areas

This chapter provides a summary of the Town's intensification supply potential within the S.G.A.s, including a review of the methodology used to develop the intensification supply and a forward-looking assessment of development opportunities.

2.1 Methodology

2.1.1 Study Areas

As the Town of Oakville continues to mature and its remaining low-density greenfield residential neighbourhoods are developed, a growing share of new residential development is expected to occur through medium- and high-density housing forms within the Town's S.G.A.s. As part of this Phase 2 Study, an in-depth review of the Town of Oakville's S.G.A.s was conducted to identify both residential and non-residential supply opportunities. These S.G.A.s are considered priority areas with the greatest potential to accommodate intensification within the Town. Accordingly, the supply opportunities outlined in this report focus on these targeted locations and are not intended to represent all possible intensification sites within the Town.

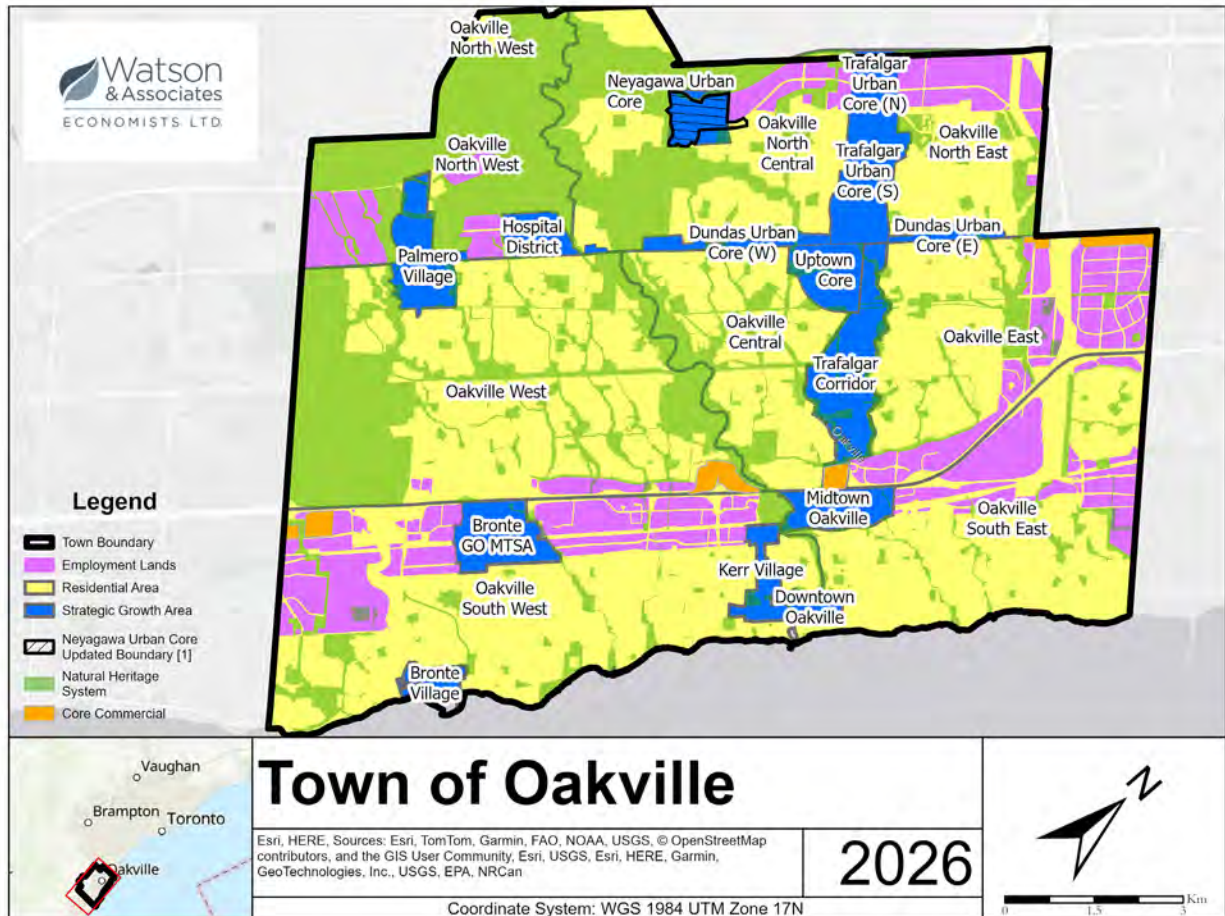
Figure 1 provides a map of the Town's S.G.A.s. These S.G.A.s are organized into 14 distinct areas, as outlined below:

- Bronte GO Major Transit Station Area (M.T.S.A.);
- Bronte Village;
- Downtown Oakville;
- Dundas Urban Core – East;
- Dundas Urban Core – West;
- Hospital District;
- Kerr Village;
- Midtown Oakville;
- Neyagawa Urban Core;
- Palermo Village;
- Trafalgar Corridor;
- Trafalgar Urban Core – North;



- Trafalgar Urban Core – South; and
- Uptown Core.

Figure 1
Town of Oakville
Strategic Growth Area



[1] The Neyagawa Urban Core boundary (Case Number: OLT-24-000968, OLT-25-000339) was approved by OLT following the analysis of this study.

Source: Watson & Associates Economists Ltd., based on Town of Oakville G.I.S. data, 2025

2.1.2 Identifying Lands for Intensification Opportunities

As set out above, the Town of Oakville’s intensification analysis focuses on identifying sites with development potential within identified S.G.A.s.



This includes categorizing land parcels into three main types based on a site-by-site review by Watson with assistance from Town staff:

- Vacant lands;
- Properties with active development applications; and
- Sites that are already developed.

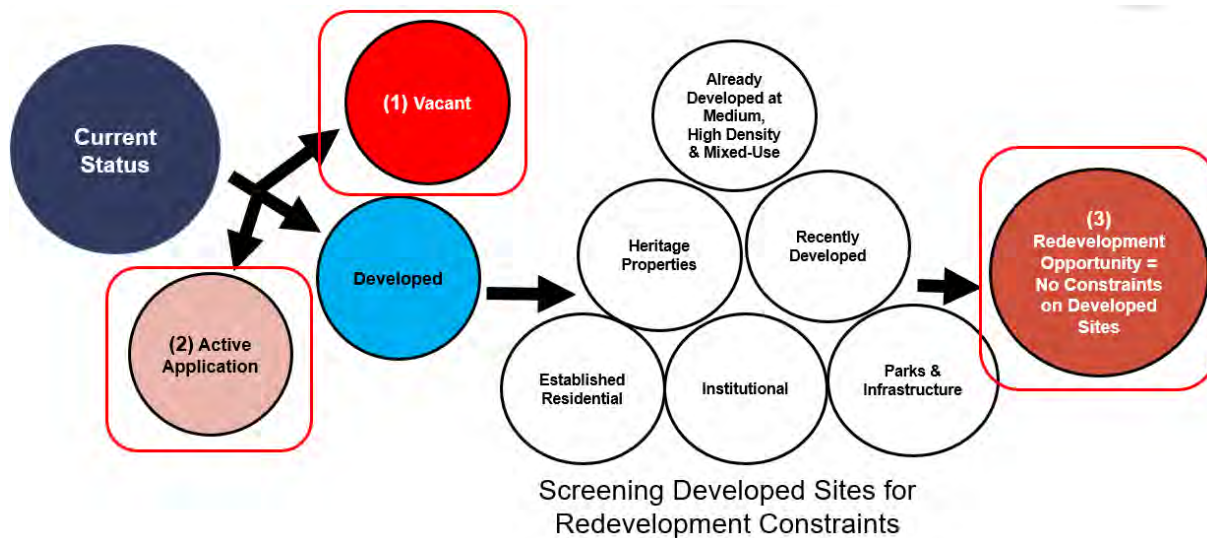
Vacant lands and active applications are considered immediate candidates for intensification. For developed sites, a detailed screening process is applied to determine whether these lands face any constraints that would limit redevelopment. These constraints include the presence of public parks, infrastructure, institutional uses, and properties that have been recently developed, typically within the past ten years. Other constraints include heritage sites. While some heritage properties may present opportunities for intensification, they are considered a lower priority because development in these areas requires a more detailed review of design and character considerations. As a result, heritage properties may offer additional intensification opportunities beyond those identified in this report.

Sites that are already built at medium- or high-density or as mixed-use are reviewed to ensure they are not already optimized for intensification. After this screening, the remaining developed sites that do not face significant constraints are identified as viable redevelopment opportunities. These sites are considered suitable for future intensification, particularly if they are underutilized or located in areas with supportive planning policies.

Figure 2 illustrates the process for identifying intensification opportunities on a site-by-site basis.



Figure 2
Identifying Intensification Sites Approach



Source: Watson & Associates Economists Ltd.

Detailed maps of the intensification areas are provided in Appendix B, which identify areas according to the three status categories: vacant lands, active applications and redevelopment opportunities, as well as any identified constraints.

2.1.3 Non-Developable Take-Out Factor Applied

Determining an appropriate “take-out factor” for intensification sites is critical to a reliable forecast of the net developable area of a given site, and thus the assumed number of residential units and gross floor area (G.F.A.) that the site could support. When identifying intensification potential, the need for parkland and right-of-way allowances must be taken into consideration. A take-out factor represents a downward adjustment to account for land that cannot be developed, such as areas required for parkland dedication and rights-of-way. For sites under two hectares, Watson applied a 15% take-out factor, primarily for rights-of-way allowances. For sites two hectares or larger, a 15% parkland conveyance and a 15% right-of-way allowance were applied, resulting in a total takeout factor of 30%.

The above assumptions reflect that while not every site will meet the threshold for a 15% conveyance under the provisions of subsection 42 (3.3) of the *Planning Act*, a certain portion of the aggregate lands in the Town’s S.G.A.s will need to be acquired for parkland (through conveyance or purchase) to service the increased residential



population. Additionally, S.G.A.s are planned for mixed-use development, integrating commercial and institutional uses alongside residential areas. This means that, compared to new greenfield developments or existing developments within the S.G.A.s, less land will be required for non-residential purposes, allowing for more compact development.

2.1.4 Review of Policy Framework

Sites identified as potential candidates for residential and non-residential intensification were evaluated in accordance with the Town's O.P., applicable Growth Area Reviews, and supporting background studies. Where ranges were provided, midpoint values were used to estimate housing unit yields and G.F.A. For active applications with approvals in place, Watson relied on the housing unit potential identified in those applications. For applications still under review, Watson applied the same general assumptions used for other intensification sites, informed by policy direction. The Town's policy framework provided guidance on the following assumptions to determine housing unit and G.F.A yields:

- Planned vision and function of the S.G.A.;
- Minimum and maximum floor space index;
- Non-residential G.F.A. requirements;
- Building height and building type considerations;
- Average units per hectare assumptions; and
- Parking considerations.

2.1.5 Identifying Housing Unit Type Opportunities

Intensification sites were grouped into logical development blocks defined by existing road networks. Fragmented parcels that could not form a cohesive block, such as those surrounded by recently developed properties or constrained by physical barriers, were identified as infill opportunities suitable for medium-density housing, including townhouse developments. Larger blocks with significant depth from the road were recognized as offering a broader range of housing options, accommodating both medium- and high-density housing forms. The remaining intensification opportunities were identified for high-density housing forms, including mid-rise apartments (typically six to 12 storeys) and stacked townhouses, as well as high-rise apartment buildings generally exceeding 12 storeys. The selection of higher-density housing forms was guided by the surrounding context, ensuring appropriate transitions to adjacent lower-



density neighbourhoods. Higher building heights were prioritized within M.T.S.A.s in locations surrounded by established higher-density built forms and guided by policy direction from applicable Growth Area Reviews.

This approach by Watson highlights the Town's commitment to providing a diverse range of housing options and building forms, rather than concentrating solely on high-density housing within intensification areas. Incorporating a range of scales, including townhouses, mid-rise apartments, and taller buildings, in carefully selected locations, fosters balanced growth that meets diverse market demands and complements the character of surrounding neighbourhoods.

2.1.6 Non-Residential Gross Floor Area Assumptions

Recognizing that a significant portion of the intensification blocks are currently occupied with commercial uses, it is critical for the Town to maintain and strengthen its commercial function as part of future redevelopment efforts. These areas play an essential role in supporting employment, services, and economic vitality, and their continued presence will help maintain a balanced urban fabric.



In addition to retaining existing commercial uses, the Town must also ensure that new development within S.G.A.s includes locally serving retail amenities that meet the daily needs of residents. This includes small-format retail, personal and professional services, and community-oriented spaces that enhance livability and walkability. Typically, commercial activity in intensification areas is characterized by a blend of institutional and retail uses, often delivered in compact and pedestrian-friendly formats. These uses contribute to complete communities by fostering social interaction, supporting transit-oriented development, and reducing reliance on automobile travel. Ensuring a thoughtful integration of commercial and residential functions will be key to creating vibrant, inclusive, and sustainable urban environments.

To support the guiding principles outlined above, Watson has made the following assumptions regarding non-residential development opportunities within intensification areas:



- Sites fronting major roads are expected to include ground-floor commercial uses integrated within residential developments, such as mid-rise buildings, and high-rise towers. Sites located near key intersections are anticipated to accommodate a greater share of commercial space, which may extend beyond the ground level to include second-storey or upper-level uses. These upper-level spaces are envisioned to support office-type functions, contributing to a diverse mix of employment and service opportunities. This approach promotes active street frontages, enhances walkability, and aligns with transit-oriented development by concentrating commercial amenities in highly accessible locations.
- S.G.A.s with a fine urban fabric (small urban blocks with more local roads), such as Kerr Village, Bronte Village and Downtown, were reviewed to identify “prime lots.” These include sites that are at least 0.2 hectares (approximately 0.5 acres) in size with a frontage of 25 metres (approximately 82 feet), as well as corner lots, which were considered prime candidates for commercial uses.
- For the remaining S.G.A.s, redevelopment of commercial sites focused on evaluating commercial development potential while recognizing that many existing retail sites, such as plazas and big-box formats, will require time to transition to mixed-use due to market conditions and site-specific constraints. Although this shift may result in a G.F.A. that differs from current levels, either larger or smaller, the intent is to maintain the core commercial function of these areas. By integrating residential and complementary uses without compromising their role as key commercial destinations, these sites will continue to serve community retail and service needs while supporting long-term growth objectives.
- S.G.A.s identified as having a stronger planned function of office uses, including the Hospital District, Midtown and the Bronte GO M.T.S.A., were guided by local policy direction in shaping development concepts for each precinct or area. They are envisioned to support higher-order office functions that serve the broader Oakville population.
- The share of non-residential G.F.A. within the total buildable G.F.A. ranged from approximately 10% for medium-density sites to 100% for sites designated for



An example of “Prime lot,” The Beer Store, Kerr Village.
Source: Google Earth Imagery.



office use. For most intensification sites, a range of 20% to 30% non-residential G.F.A. was assumed, based on the considerations previously outlined.

2.1.7 Generating Housing Unit Yields

The residential buildable area was then converted into housing units after accounting for the non-residential G.F.A. and applying a building efficiency rate of 80% to the residential building G.F.A.^[1] The following assumptions were applied when translating residential building G.F.A. space into housing units:

- Townhouses: 110 sq.m (approximately 1180 square feet (sq.ft.) per unit; and
- Apartments: 70 sq.m (approximately 750 sq.ft.) per unit.^[2]

The estimated housing units for each S.G.A. were then evaluated against the Town's O.P. policies and, where applicable, benchmarked against Growth Review Studies and other supporting documents to ensure alignment with policy targets for the average number of units per hectare.

2.2 Review of Active Applications within the Town's Strategic Growth Areas

A key component of the intensification analysis involved reviewing development activity within the Town's S.G.A.s. As summarized in Figure 3, development interest is concentrated within the S.G.A.s, as evidenced by the volume of active applications. The current application pipeline includes approximately 36,430 housing units within the identified S.G.A.s. Of these housing units, approximately 3% have received approval, while the remaining 97% are in the proposed stage. Figure 4 summarizes active applications by housing type, indicating a strong concentration of high-density development. Please see Appendix C for additional information. Key highlights are provided below:

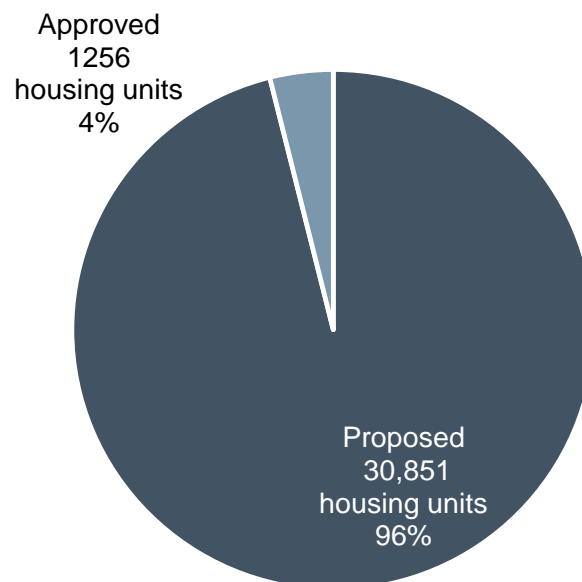
^[1] A building efficiency rate refers to the proportion of the total gross floor area that can be used for actual living space or functional purposes. It accounts for areas that are not usable for residential units, such as hallways, stairwells, mechanical rooms, and other common spaces.

^[2] Housing assumptions for Midtown were based on background information supporting O.P.A. 70.



- Apartment housing units represent approximately 70% of all active applications, with townhouses and stacked townhouses accounting for the remaining 30% of the housing units;
- Of the approved housing units, 45% are located in Dundas Urban Core West and 36% in Trafalgar Urban Core South, all of which are high-density developments; and
- Among proposed housing units, 30% are located in Trafalgar Urban Core South, 28% in Trafalgar Urban Core North, and 13% in Midtown, consisting primarily of high- and medium-density housing forms.

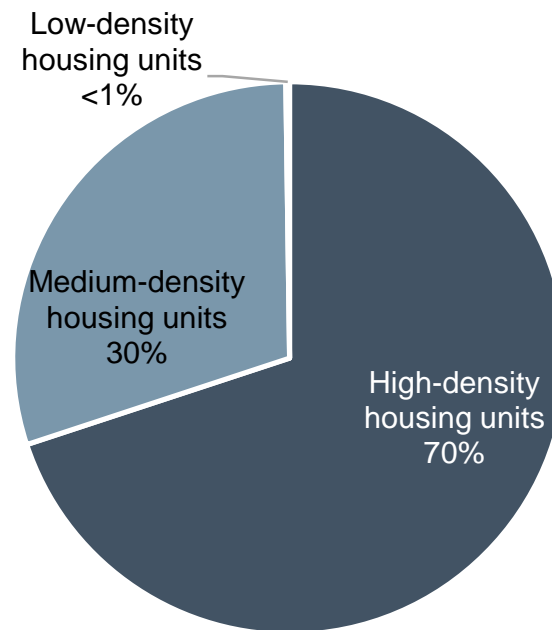
Figure 3
Town of Oakville
Housing Units in Active Applications within Strategic Growth Areas
by Application Status, 2025



Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd.



Figure 4
Town of Oakville
Housing Units in Active Applications within Intensification Areas by Housing Type, 2025



Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd.

2.3 Intensification Potential by Strategic Growth Area

For the intensification analysis presented in the following sections, only approved applications from the active development pipeline were considered, as these represent committed projects with a high likelihood of proceeding. Proposed applications were evaluated alongside remaining vacant parcels and potential redevelopment sites to assess their suitability for future intensification opportunities.

2.3.1 Overview of Strategic Growth Areas

Oakville's S.G.A.s are intended to be the Town's most dense and intensive areas, accommodating the majority of the Town's high-density housing and employment growth. This level of concentration is essential to support higher-order transit and reduce automobile dependence. In particular, lands located adjacent to major roads planned for high-order transit – such as bus rapid transit or future light rail – and lands near transit stations require maximum density to achieve resident and employment



thresholds necessary to support transit investment and ridership. Medium-density housing is not appropriate in these locations, as it does not provide sufficient density to meet these objectives.

The following summarizes the land potential of each S.G.A., assessing growth opportunities. The analysis considers local context, such as existing land use, community character, and policy directions, in order to align with the Town's planning objectives. A map of the identified areas is provided in subsection 2.1.1.

Bronte GO M.T.S.A. is planned as an M.T.S.A. that concentrates growth in a compact, transit-supportive, and pedestrian-oriented form, with the highest intensity directed to lands closest to the station and along key corridors. The Livable Oakville Plan establishes this framework through a district-based structure supported by schedules that regulate land use mix, building heights, minimum density expectations, and urban design. The Station District is designed to serve as the focal point of the area, featuring the tallest buildings and the most intensive mix of uses, with active ground-floor commercial spaces along primary streets and a clear shift away from auto-oriented site design.

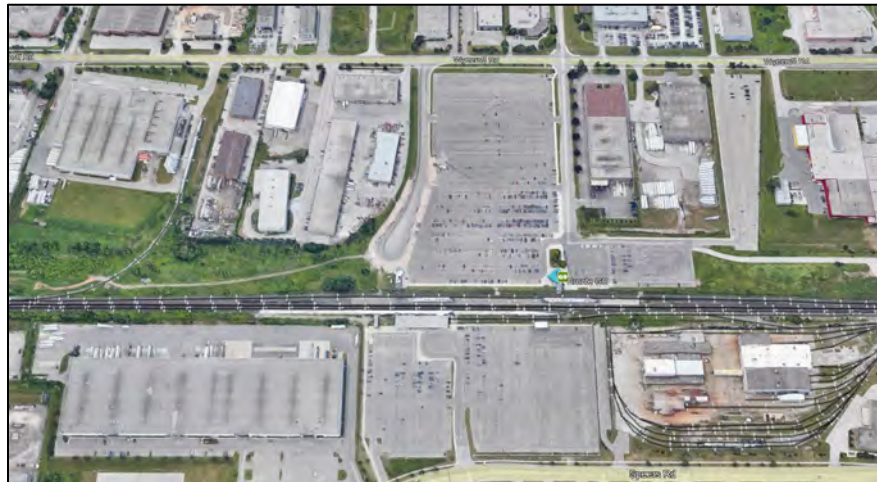
Implementation policies emphasize phased development, coordinated with infrastructure delivery, so that early projects do not compromise the long-term mobility network or public realm. Surface parking is limited, with a strong preference for structured or underground solutions. Development adjacent to the rail corridor is required to address noise, vibration, air quality, and setback considerations. Certain low-intensity and auto-oriented formats are restricted, while employment and major office uses are supported in appropriate locations through tools such as holding provisions, area-specific design plans, and incentives tied to public benefits, including roads, parks, open space, and office space.^[3]

The existing built form consists mainly of employment lands and corridor-style commercial sites rather than vacant greenfield parcels, meaning intensification will be driven by redevelopment and site consolidation over time. Larger, underutilized blocks present the most viable opportunities to deliver the planned urban structure, as they can accommodate new local streets, walkable block patterns, coordinated parking strategies, and enhanced streetscapes. The GO station and adjoining corridors remain

^[3] Livable Oakville Plan, subsection 27.2.



the primary anchors, and early redevelopment activity is most likely where parcel assembly is feasible and where intensity is already anticipated by policy.



Large, underutilized parcels in Bronte GO M.T.S.A.
Source: Google Earth Imagery.

Downtown Oakville is planned to remain the Town's historical, pedestrian-oriented mixed-use centre, with a strong emphasis on heritage conservation, main street vitality, and a high-quality public realm. The Livable Oakville Plan prioritizes the protection and enhancement of the Downtown Oakville Heritage Conservation District, requiring new development and intensification to be compatible with the established scale, character, and fine-grained built form (smaller urban blocks). A diverse mix of retail, office, cultural, civic, and residential uses is supported to ensure activity throughout the day and across seasons.^[4]



Transportation and parking policies reinforce a pedestrian-first environment by prioritizing walking, cycling, and transit, maintaining a connected street network, and managing parking through shared and centralized facilities. Surface parking is discouraged, and commercial uses within the Central Business District are exempt from parking requirements, which supports adaptive reuse and small-scale infill. This

^[4] Livable Oakville Plan, subsection 25.2.



approach is reinforced by the Downtown Oakville Heritage Conservation District Plan and Guidelines, as well as the Town's ongoing heritage review initiatives.^[5]

The area is largely built out and highly valued, with limited availability of large redevelopment parcels. As a result, intensification is most likely to occur through selective infill, adaptive reuse, and modest site consolidation, which can introduce additional residential or mixed-use capacity without undermining heritage attributes. Recent public realm investments, including streetscape improvements along Lakeshore Road East, have strengthened walkability and reinforced Downtown Oakville's role as a regional destination. The waterfront and harbour continue to function as defining anchors, supported by the Harbours Master Plan, which focuses on improving public access, connectivity, and amenities while protecting natural and cultural heritage.^[6]

Dundas Urban Core Area (East and West) is planned as a continuous mixed-use corridor along Dundas Street, accommodating medium and high-density development with commercial and service uses concentrated at key intersections. The North Oakville East Secondary Plan supports a broad range of office, retail, service, commercial, institutional, health and medical, and medium and high-density residential uses, with commercial activity directed to node locations where it can be integrated into mixed-use buildings rather than forming a continuous strip.^[7]

Built form is managed through minimum height requirements and generally mid-rise maximums, with limited opportunities for additional height in specific locations. Retail permissions are deliberately structured to avoid stripping commercial outcomes by capping the total retail floor area and limiting individual store sizes, while allowing larger-format retail to concentrate at key nodes, such as Dundas Street West and Neyagawa Boulevard. The corridor is intended to function as a cohesive streetscape supported by strong transit service, pedestrian connections, and cycling infrastructure.

The surrounding context reflects North Oakville's newer growth area, with developing neighbourhoods, remaining growth parcels, and established commercial and community anchors at major intersections. The Dundas and Neyagawa node is a particularly

^[5] Livable Oakville Plan, subsection 25.4.

^[6] Livable Oakville Plan, subsection 25.6.

^[7] North Oakville East Secondary Plan 7.5.15.



significant focal point, where existing retail and institutional uses already support higher activity levels.

The **Hospital District** is centred around the Oakville Trafalgar Memorial Hospital and is planned to evolve into a compact, transit-supportive urban campus with a strong employment focus. The Area Specific Plan establishes a framework that combines urban core mixed-use permissions with institutional lands around the hospital and ErinoakKids, emphasizing walkability, internal connectivity, and the integration of green connections and urban squares. Built form is generally planned within a mid-rise range, with taller permissions concentrated east of Third Line and south of William Halton Parkway, subject to constraints related to the hospital helipad flight path.^[8]

Existing conditions are defined by major institutional anchors, including the hospital, ErinoakKids, medical office buildings, and approved senior care and long-term care facilities. Additional intensification permissions east of Third Line reinforce the district's role as a hub for health and employment. Development is expected to proceed through phased intensification on larger blocks where comprehensive planning can deliver new internal connections, smaller block patterns, and parking approaches that reduce surface lot dominance.

The long-term evolution of the district is closely tied to transit investment along Dundas Street and the ability to attract specialized health, research, and innovation-related uses alongside more typical hospital-supportive functions, such as clinics, diagnostics, pharmacies, and seniors-focused services.

Kerr Village is identified as a Growth Area intended to be revitalized as a vibrant business district and cultural hub, with mixed-use intensification focused on a compact, pedestrian-oriented main street along Kerr Street. The Livable Oakville Plan organizes the area into Upper Kerr Village, Kerr Village Main Street, and Lower Kerr Village districts, establishing a clear transition from higher-intensity mixed-use forms to surrounding residential neighbourhoods. Policy direction places a strong emphasis on public realm quality through enhanced



^[8] Area Specific Plan: A Future for Health and Innovation (Oakville Hospital District), prepared by Sajecki Planning, published in March 2021



streetscapes, urban squares, gateway features, and active ground-floor uses, supported by a reduced reliance on surface parking and an increased use of shared or structured parking solutions.^[9]

The existing built form comprises a well-established, fine-grained main street with independent shops, restaurants, and services, supported by the Kerr Village Business Improvement Area, alongside older commercial plazas and larger sites that present the most significant opportunities for intensification. A key catalyst is the comprehensive redevelopment proposal at the northwest corner of Kerr Street and Speers Road, which aims to replace the existing plazas with a coordinated mixed-use community that includes residential buildings, replacement commercial space with a grocery component, new parks and urban squares, and a new internal street network.

Midtown Oakville is planned as the Town's primary Protected Major Transit Station Area (P.M.T.S.A.), intended to evolve into a vibrant, transit-supportive mixed-use urban community and Employment Area. The Livable Oakville Plan establishes a clear district-based structure comprising the Station, Trafalgar, Lyons, Chartwell, and Cornwall districts, each guiding the land use mix, built form, and transition over time. Policy direction aligns growth with significant mobility investments, including new road connections, improved crossings, and enhanced pedestrian and cycling networks, while emphasizing high-quality urban design and landmark architecture for taller buildings.^[2]

Parking policies discourage surface parking, restrict driveway access on Trafalgar Road, and encourage shared and structured parking solutions supported by monitoring and bonusing for public benefits. Existing conditions include large areas of underutilized land around the Oakville GO Station, characterized by hotels, commercial plazas, and auto-oriented retail formats that are well-positioned for comprehensive redevelopment.^[10] The Town of Oakville recently adopted an O.P.A. 70 (Midtown Oakville Protected M.T.S.A.) based on the Midtown Oakville Growth Area Review.^[11]

^[9] Livable Oakville Plan, subsection 23.2.

^[10] Livable Oakville Plan, subsection 20.4.

^[11] Official Plan Amendment No. 70, passed on February 18, 2025.



The **Neyagawa Urban Core**^[12] is designed to serve as a mixed-use focal point for the western portion of North Oakville East, accommodating commercial, residential, and institutional uses at a lower scale than that of the Trafalgar Urban Core. The North Oakville Secondary Plan establishes detailed built form and site design directions to support a pedestrian-oriented main street environment, requiring retail and service commercial uses to front the street with direct sidewalk access, transparent façades, and weather protection features.

Auto-oriented frontage conditions are discouraged through restrictions on parking, driveways, and aisles between buildings and sidewalks, supported by consistent setbacks and limited street-adjacent parking. The area is anchored by the intersection of Neyagawa Boulevard and Burnhamthorpe Road West and is closely tied to future higher-order transit planning, including a potential Highway 407 Transitway station. The surrounding context includes established neighbourhoods, institutional uses such as King's Christian Collegiate, and properties anticipated to be redeveloped over time.^[13]

Larger parcels and block-sized sites provide an opportunity to implement the planned street pattern, mixed-use buildings, and cohesive public realm.

Palermo Village is planned as a transit-supportive, pedestrian-oriented mixed-use community anchored by a defined main street along Old Bronte Road and Khalsa Gate. The Livable Oakville Plan emphasizes high-quality urban design through enhanced streetscapes, pedestrian-scaled lighting, street trees, and a series of small urban squares. A transit terminal is identified as a central organizing element to support interregional connections along Dundas Street and Highway 407, and to integrate with local transit and mixed-use development.

Policy direction limits surface parking, prioritizes structured solutions, and restricts driveway access along key corridors to protect walkability and transit operations. Stormwater management infrastructure is identified as a key enabling component, with a pond anticipated in the southeast portion of the area. The area is characterized by large landholdings and an emerging master-planned development context at the Dundas Street and Bronte Road gateway, supported by active subdivision and zoning

^[12] Town of Oakville O.P.A. 326 and 45 were adopted by Council on March 3, 2025. The updated Neyagawa Urban Core boundary (Case Number: OLT-24-000968, OLT-25-000339) was approved by OLT following the analysis of this study.

^[13] North Oakville Secondary Plan, subsection 7.5.16.



applications that propose a complete community structure with mixed-use blocks, a transit terminal, parks, and Highway 407 Transitway-related infrastructure.^[14], ^[15]

Trafalgar Urban Core North and South is planned as the primary focal point for development in North Oakville East, accommodating the highest densities and a full range of residential, employment, commercial, and community uses. The North Oakville Secondary Plan establishes that Trafalgar Road is envisioned as a community main street defined by strong street-related built form, generous sidewalks, enhanced tree planting, and urban squares at key locations. Retail and service uses are to be delivered in an active main street format, with parking located away from Trafalgar Road and commercial activity clustered in select nodes.

Key mixed-use nodes at Trafalgar and Dundas, as well as at Trafalgar and Burnhamthorpe, anchor the corridor and reinforce connections to Uptown and other town-wide destinations. Existing conditions reflect an area in transition, with large-format commercial lands near Dundas positioned for phased redevelopment, and other sites already advancing apartment form intensification. Implementation will require careful coordination to achieve walkable conditions along an arterial corridor and to maintain a commercially anchored mix. Comprehensive block-scale redevelopment offers the strongest opportunity to establish the intended urban character and public realm early in the development of the area.^[16]

The **Uptown Core** is identified as a primary Growth Area intended to evolve into a walkable, transit-supportive mixed-use urban centre with medium- and high-density housing, offices, and retail and service uses. The Livable Oakville Plan directs intensification to the Urban Neighbourhood, Centre, and Main Street districts, while maintaining stability in surrounding neighbourhood areas. The Centre District is planned to transition from a low-intensity commercial to a more urban mixed-use form, anchored by the transit terminal at Taunton Road and Oak Walk Drive. Meanwhile, the Main Street District is intended to become the focal point for pedestrian and community activity.^[17]

^[14] Livable Oakville Plan, subsection 22.4.

^[15] The Palermo Village Growth Area Review was Regionally approved, with modifications through O.P.A. 34, on March 13, 2023, and culminated in an OLT decision issued in July 2025.

^[16] North Oakville Secondary Plan, subsection 7.5.15.

^[17] Livable Oakville Plan, subsection 21.3



Existing conditions include established residential neighbourhoods and community amenities, alongside underutilized commercial plazas and surface parking areas that present clear redevelopment opportunities. Long-term success will depend on managing redevelopment phasing so that early projects reinforce the central street vision, coordinating growth with transit and road capacity, and carefully transitioning height and density near stable areas. Converting underutilized commercial lands into complete community blocks with active ground-floor uses, improved pedestrian connections, and a more potent mix of employment and services remains the central opportunity for the Uptown Core.

2.3.2 Summary of Intensification Potential by Strategic Growth Area

Figure 5 and Figure 6 provide a summary of the intensification potential for housing and non-residential G.F.A. by S.G.A. The S.G.A.s. collectively are anticipated to accommodate approximately 79,950 housing units and 2.4 million sq.m of non-residential G.F.A. It is important to note that the non-residential G.F.A. is summarized in Figure 5 has not been adjusted for the net increase in G.F.A. based on the change in the urban form of existing non-residential sites through redevelopment. Further information on employment yields and a net increase in employment is provided in subsection 2.3.4. Key highlights of Figure 5 and Figure 6 are provided below.

- As illustrated in Figure 5 and Figure 6, the Midtown Oakville and Trafalgar Urban Core areas, North and South, are expected to have the greatest intensification potential. Together, they account for approximately 62% of the housing unit capacity within the S.G.A.s, representing about 49,300 units combined. Provided below are further details on these S.G.A.s.
 - It is important to note that the housing assumptions for Midtown are based on background work prepared for the recently endorsed O.P.A. 70, which establishes Midtown as a Protected Major Transit Station Area (P.M.T.S.A.) and a key growth node for Oakville.
 - The Trafalgar Urban Cores (North and South), located in North Oakville and characterized by large development blocks, present a unique opportunity to deliver a complete, mixed-use community. Their size and configuration allow for a full range of residential forms, including mid-rise and high-rise apartments, stacked townhouses, and multi-family units, integrated with high-quality public spaces. Equally important, these cores are envisioned as significant commercial nodes within the broader urban



structure, providing office space, retail, and services that support daily needs and employment opportunities.

- Uptown Core is anticipated to accommodate approximately 6,700 housing units. It is important to note that the Town is undertaking a further assessment of the intensification potential of Uptown Core as part of a Growth Area Review. As part of that review, an in-depth examination will be conducted, which may include an assessment of changes to land-use permissions and the area's vision. The review of the intensification potential utilized in this report represents opportunities to accommodate during the current planning horizon, and it is recognized that beyond this period, intensification potential may be even greater.
- The remaining S.G.A.s represent approximately 30% of the housing unit potential.
- The Dundas Urban Core is envisioned as a high-density, mixed-use urban node that serves as a focal area for residential and employment growth. Intensification within the Urban Core is intended to support high-density housing development that leverages existing and planned transit infrastructure.
- Palermo Village and the Neyagawa Urban Core S.G.A.s are expected to play a key role in accommodating a substantial share of medium-density housing among the S.G.A.s. The policy vision and land base provide opportunities for a diverse range of housing forms, including townhouses and mid-rise developments, contributing to complete, transit-supportive communities.
- Bronte GO M.T.S.A. and the Hospital District are anticipated to accommodate intensification potential that includes a greater focus on non-residential uses.

Provided below are key highlights:

- Based on the schedules prepared for O.P.A. 41, the Bronte GO M.T.S.A. is anticipated to prioritize office and prestige non-residential development on blocks with frontage along the Queen Elizabeth Way, as well as blocks along Third Line and within the eastern portion of the M.T.S.A. This strategic focus leverages the area's high visibility and accessibility to regional transportation corridors, making it an attractive location for employment-generating uses such as corporate offices, professional services, and complementary commercial spaces.
- According to the Area Specific Plan for the Hospital District, G.F.A. within the Hospital District is expected to be predominantly non-residential, creating a health-focused employment hub anchored by Oakville Trafalgar Memorial Hospital.



- S.G.A.s with finer urban fabric (small urban blocks), such as Bronte Village, Kerr Village, and Downtown Oakville, are anticipated to accommodate a smaller share of overall intensification potential compared to larger S.G.A.s. Key highlights are provided below.
 - These areas are characterized by established street patterns, heritage assets, and smaller development parcels, which limit opportunities for large-scale redevelopment. Instead, growth will occur through incremental infill and mid-rise mixed-use projects that respect existing character while enhancing vibrancy. While their contribution to housing supply is modest, these areas serve as cultural and economic anchors, supporting tourism, local businesses, and high-quality public spaces that complement higher-intensity growth in other S.G.A.s.
 - It is important to note that additional intensification potential may be achieved within these areas. As part of the analysis prepared by Watson, heritage properties have been excluded from the analysis, recognizing that any redevelopment would require a detailed review and careful consideration of heritage conservation policies. It is important to note, however, that additional intensification potential may still be achieved within these areas over time through sensitive infill and adaptive reuse strategies that respect their unique cultural and architectural significance.



Figure 5
Town of Oakville
Housing Unit and Non-Residential Growth Floor Area (G.F.A.) Potential within Strategic Growth Areas

Strategic Growth Areas	Low-Density Housing Units ^[1]	Medium-Density Housing Units ^[2]	High-Density Housing Units ^[3]	Total Housing Units	Share of Housing Unit Potential	Non-Residential G.F.A. (sq.m)	Share of Non-Residential G.F.A. Potential
Midtown Oakville	-	-	19,660	19,660	25%	466,680	20%
Trafalgar Urban Core - South	-	1,170	18,330	19,510	24%	149,590	6%
Trafalgar Urban Core - North	-	10,000	110	10,110	13%	94,920	4%
Uptown Core	-	-	6,740	6,740	8%	221,960	9%
Bronte GO M.T.S.A.	-	-	4,770	4,770	6%	698,320	30%
Palermo Village	-	1,750	2,430	4,180	5%	99,970	4%
Neyagawa Urban Core ^[4]	-	3,180	-	3,180	4%	29,880	1%
Dundas Urban Core - West	-	-	3,600	3,600	5%	92,020	4%
Hospital District	-	-	2,700	2,700	3%	364,940	15%
Dundas Urban Core - East	-	-	2,660	2,660	3%	88,750	4%
Kerr Village	100	50	1,030	1,170	1%	25,630	1%
Downtown Oakville	-	30	570	590	1%	15,960	1%
Trafalgar Corridor	-	60	520	580	1%	4,530	0%
Bronte Village	-	90	390	480	1%	9,500	0%
Total Intensification	100	16,330	63,520	79,950	100%	2,362,660	100%

^[1] Includes single and semi-detached houses.

^[2] Includes back-to-back townhouses and street townhouses.

^[3] Includes stacked townhouses and apartments.

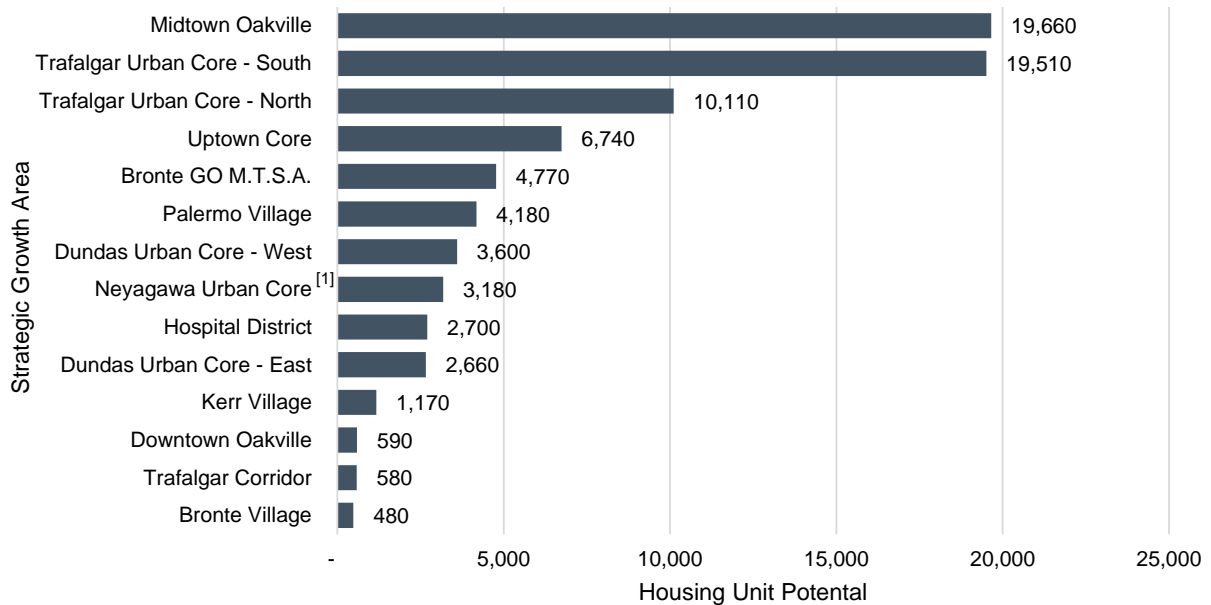
^[4] Neyagawa Urban Core Updated Boundary (approved by OLT, Case Number OLT-24-000968 and OLT-25-000339)

Notes: Figures have been rounded and may not add precisely. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd.



Figure 6
Town of Oakville
Housing Unit Supply Potential by Strategic Growth Area



[1] Town of Oakville O.P.A. 326 and 45 were adopted by Council on March 3, 2025. The updated Neyagawa Urban Core boundary (Case Number: OLT-24-000968, OLT-25-000339) was approved by OLT following the analysis of this study.

Notes: Includes approved and other intensification opportunities. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd.

2.3.3 Total Housing Unit Yields Potential by Housing Type

Figure 7 presents a summary of intensification opportunities within the identified areas, drawing on the methodology previously outlined and the number of housing units associated with approved development applications. As previously discussed, only approved applications from the active development pipeline were included, as these represent confirmed projects that are unlikely to change. Proposed applications were grouped and assessed alongside remaining vacant parcels and redevelopment sites to evaluate their potential for future intensification. Again, the analysis indicates that Oakville's intensification areas have the capacity to accommodate approximately 79,950 housing units. Of this total, 63,520 units are for high-density housing, 16,330 units are suitable for medium-density housing, while the remaining 100 units are intended for low-density housing forms. One of the main objectives of the analysis was to support a broad range of housing types, including townhouses, stacked townhouses, low-rise,



mid-rise and high-rise apartments. As previously discussed, the analysis did not apply the maximum permitted densities established in the Town’s policy framework. Instead, the approach was focused on providing a variety of housing options that reflect projected demand and respect the surrounding local context, ensuring appropriate transitions to existing low-density neighbourhoods.

Figure 7
Town of Oakville
Residential Housing Unit Potential within Strategic Growth Areas, 2025

Intensification Opportunities	Low-Density Housing Units ^[1]	Medium-Density Housing Units ^[2]	High-Density Housing Units ^[3]	Total Units	Share of Housing Units (%)
Approved Applications	-	60	1,200	1,260	2%
Other Intensification Opportunities	100	16,270	62,230	78,690	98%
Total Intensification Potential	100	16,330	63,520	79,950	100%
Housing Unit Mix (%)	0%	21%	79%	100%	-

^[1] Includes single and semi-detached houses.

^[2] Includes back-to-back townhouses and street townhouses.

^[3] Includes stacked townhouses and apartments.

Notes: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities are based on intensification potential on vacant lands and redevelopment, as analyzed by Watson & Associates Economists Ltd.

2.3.4 Total Non-Residential Gross Floor Area Potential

As previously discussed, as part of this study, opportunities for non-residential G.F.A. within the intensification areas were examined. The analysis focused on identifying G.F.A. that would support the continued commercial function of existing retail and service areas, while introducing new opportunities to serve the anticipated local population. The objective is not to preserve the existing quantity of commercial G.F.A., but rather to maintain and evolve its functional role. Much of the existing commercial built form is oriented toward automobile access and regional markets. As intensification occurs, commercial spaces are expected to transition toward formats that are more integrated with the surrounding urban fabric and responsive to a localized, pedestrian-



oriented customer base. This approach supports a more context-sensitive and sustainable urban structure, ensuring that non-residential uses remain viable and relevant over time.

For the purposes of this analysis, four categories of non-residential G.F.A. were identified: retail/office, retail, office, and institutional. Retail/office refers to mixed-use developments containing both retail and office components, while retail, office, and institutional categories represent stand-alone developments with a single primary use.

Figure 8 summarizes the distribution of non-residential G.F.A. within the intensification areas. As shown in Figure 8, the intensification areas have the potential to accommodate approximately 2,362,660 sq.m (25,431,436 sq.ft.) of non-residential G.F.A. Of this total, approximately 5% is associated with approved applications. The Bronte GO M.T.S.A. accounts for 30%, with 20% in Midtown Oakville and approximately 15% of the Town's non-residential G.F.A. in the Hospital District, primarily reflecting concentrations of institutional and office uses, respectively.

Figure 8
Town of Oakville
Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Areas, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total Non-Residential G.F.A. (sq.m)	Share of G.F.A. (%)
Approved Applications	-	12,920	50,010	50,010	112,940	5%
Other Intensification Opportunities	315,760	1,132,010	769,940	32,010	2,249,720	95%
Total Non-Residential Potential	315,760	1,144,930	819,950	82,020	2,362,660	100%
Total Non-Residential G.F.A. Mix (%)	13%	48%	35%	3%	100%	-

Note: The above figure has been rounded. Due to rounding, figures may differ slightly. Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities are based on intensification potential on vacant lands and redevelopment, as analyzed by Watson & Associates Economists Ltd.



2.3.5 Employment Yields Potential

It is estimated that non-residential sites identified for redevelopment within the S.G.A.s currently accommodate approximately 7,000 jobs.^[18] These lands are primarily occupied by big-box retail stores and single-storey commercial buildings with extensive surface parking, representing a relatively low-intensity use of land. Redevelopment of these sites offers a significant opportunity to transition toward more efficient, mixed-use forms that integrate employment, residential, and community amenities within a compact, transit-supportive environment. Given the current market vibrancy, however, and the strong performance of many of these commercial properties, redevelopment may occur gradually over a longer time horizon as market conditions evolve and redevelopment becomes financially viable. This phased transition will require careful planning to maintain employment functions while introducing higher-density uses that contribute to a complete community.

Figure 9 illustrates the estimated employment potential through intensification, calculated on a net basis. Non-residential G.F.A. has been converted to employment using an assumed average floor space per worker of approximately 37 sq.m per employee (400 sq.ft. per employee) for retail/institutional opportunities and 21 sq.m per employee (226 sq.ft.) for office opportunities. Overall, the S.G.A.s have the opportunity to accommodate a significant number of additional jobs, approximately 75,850 jobs on intensification sites. It is important to note that the employment net increase excludes work at home employment or any employment changes on sites not identified for intensification opportunities.

As summarized in Figure 9, the Bronte GO M.T.S.A. is anticipated to provide the greatest opportunities for employment on intensification sites, with the potential for up to 26,000 additional retail, commercial, and office jobs. Midtown Oakville, the Hospital District, and the Uptown Core are also anticipated to accommodate a significant increase in employment, given their focus as key nodes for retail and office uses. Together, Bronte GO M.T.S.A., Midtown Oakville, the Hospital District, and the Uptown Core account for approximately 85% of the employment potential within the S.G.A.s through intensification. The employment base within these S.G.A.s is expected to serve not only the local population but also play a broader role in supporting the Town's

^[18] Based on desktop review by Watson & Associates Economists Ltd. utilizing the Region of Halton Employment Survey and Town of Oakville geographic information systems data (e.g., building footprints and aerial imagery).



overall population by offering a diverse range of commercial services and supporting the Town's key employment sectors, particularly those in knowledge-based sectors.

In contrast, Downtown Oakville and Kerr Village are not anticipated to provide a net increase in employment through intensification. It is essential to acknowledge that these areas already have a robust commercial foundation, much of which is characterized by mixed-use built forms. A key focus of these areas is to maintain the commercial function while incorporating additional housing opportunities within the S.G.A.s. Similarly, while the Trafalgar Corridor in Figure 9 does not currently show a net increase in employment on intensification sites, it is important to note that the intensification potential of Sheridan College and Oakville Place Mall has not been assessed and is therefore excluded from this analysis. These sites may offer additional opportunities for intensification, especially in the longer term.

The remaining S.G.A.s offer moderate opportunities for additional employment, primarily oriented toward serving the local population. Employment levels and associated G.F.A. have been evaluated in relation to the population base within each S.G.A. and the surrounding residential areas.

It is important to acknowledge that S.G.A.s, when redeveloped in a mixed-use format, will accommodate a diverse range of employment types, including population-related services and office-based uses. In many cases, the non-residential component within the S.G.A.s is expected to become more diverse over time, incorporating a range of commercial, institutional, and service-oriented functions that cater to both local needs and the wider town population. This evolution will strengthen the role of S.G.A.s as complete communities, balancing residential growth with employment opportunities and essential amenities.



Figure 9
Town of Oakville
Estimated Employment Yields Potential on Intensification Sites
in Strategic Growth Areas

Strategic Growth Areas	Total Employment Potential	Existing Employment on Redevelopment Lands	Net Employment Increase
-	A	B	C = A – B
Bronte GO M.T.S.A.	28,230	2,200	26,030
Midtown Oakville	19,240	1,700	17,540
Hospital District	12,880	-	12,880
Uptown Core	6,000	1,400	4,600
Trafalgar Urban Core – South	4,040	-	4,040
Palermo Village	2,700	-	2,700
Trafalgar Urban Core – North	2,570	-	2,570
Dundas Urban Core – West	2,490	-	2,490
Dundas Urban Core – East	2,400	-	2,400
Neyagawa Urban Core	810	-	810
Bronte Village	260	200	60
Trafalgar Corridor	120	120	0
Downtown Oakville	430	500	-70
Kerr Village	700	900	-200
Total Strategic Growth Areas	82,870	7,020	75,850

Notes: Employment yields represent opportunities on redevelopment, vacant and recently approved development application sites. Excludes work at home employment potential. Existing employment represents only employment on sites that have been identified for intensification. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd., 2025. Existing employment on redevelopment sites is based on the Region of Halton Employment Survey and geographic information systems data.



3. Recent Residential Development Trends

3.1 Introduction

Over the past decade, Oakville has experienced a significant increase in population, housing and employment growth. During this same period, average prices and rents have also risen, resulting in reduced affordability across the housing continuum. Expanding housing choice is increasingly important to maintain a balanced, resilient community that supports a range of population by income and age. Housing affordability influences quality of place, economic growth, and competitiveness by shaping the Town's ability to attract and retain residents and businesses. In an increasingly knowledge-based economy, retaining skilled workers requires a diverse housing stock for individuals and families at all life stages.

3.2 Housing Market Trends by Structure Type

3.2.1 The Continued Role of Medium-Density Housing Forms in Oakville

As Oakville's population continues to grow and diversify, demand for broader housing options will rise. Demographic and market trends, including greater cultural diversity, an aging Baby Boom^[19] cohort, and ongoing affordability pressures, point to a need for a broader mix by type, built form, density, and price. Within this context, it is increasingly important for the Town to consider "missing middle" housing typologies, including townhouses, stacked townhouses, and low-rise apartments that can offer a bridge between single detached dwellings and mid-rise and high-rise apartments. These housing forms add gentle density, support affordability, and help balance the Town's supply. This Phase 2 Growth Analysis examines the housing capacity within S.G.A.s for both higher-density and "missing middle" housing options.^[20]

[19] The Baby Boom population is generally defined as people born between 1946 and 1964.

[20] Missing middle refers to the range of housing types between traditional single detached houses and high-rise apartments that have gone "missing" from many large cities in Ontario. The missing middle describes a range of medium-density housing types, including multi-unit or clustered housing types compatible in scale with single-



While medium-density dwellings can often be considered a reasonable substitute for a detached dwelling based on built form and size characteristics (number of bedrooms, provision for a yard and garage), the similarities and substitution potential of high-density for medium-density units is not as strong. This is largely due to the average size, number of bedrooms and absence of a private yard when considering high-density dwellings. Also, high-density condominium units are not necessarily more affordable than grade-related dwellings on a square foot basis. Condominium fees also further contribute to the total carrying costs of condominium units. Notwithstanding the above, some middle-income families may choose smaller condominium units over townhomes for lifestyle reasons.

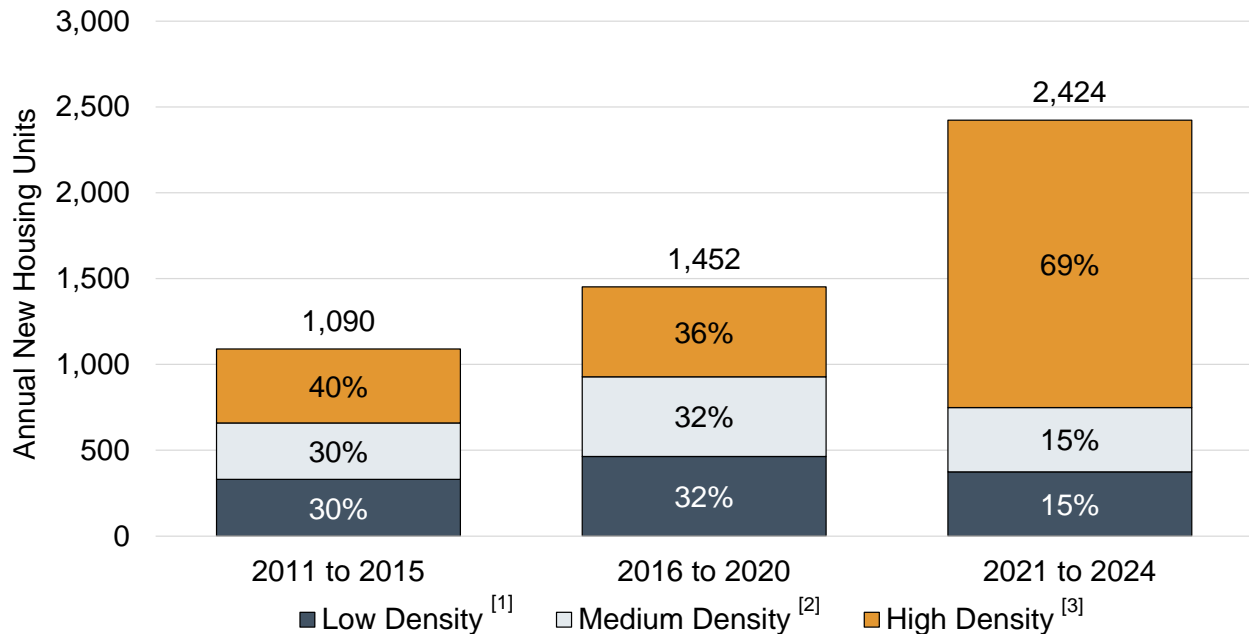
Figure 10 illustrates a clear shift in the composition of new housing development in the Town of Oakville over the 2011 to 2024 period. Between 2011 and 2020, housing development was relatively balanced across all structure types. In contrast, the 2021 to 2024 period shows a marked change in development patterns. Annual housing development increased significantly relative to the previous periods, with high-density development accounting for approximately 69% of all new units while both low-density and medium-density housing declined to 30% of the total building permits issued for new units during this period. This represents a substantial reduction in the delivery of low and medium-density housing relative to historical trends, despite the long-standing role of these housing forms in meeting the needs of primarily middle and high-income households, particularly families.

The decline in medium-density development is notable given its importance in providing housing that balances density efficiency with unit size, bedroom count, and access to private outdoor space. Historically, medium-density housing has supported ownership opportunities, facilitated gentle intensification, and contributed to complete communities that accommodate a range of household types. The recent shift toward predominantly high-density development suggests a narrowing of the housing mix, which may have implications for affordability, household retention, and the Town's ability to continue providing missing-middle housing options over the longer term.

family homes that help meet the growing demand for walkable urban living, such as duplexes, triplexes, fourplexes, rowhouses, and townhouses.



Figure 10
Town of Oakville
Annual New Housing Units by Structure Type, 2011 to 2024



^[1] Includes single and semi-detached houses.

^[2] Includes townhouses and apartments in duplexes.

^[3] Includes stacked townhouses, apartments, and secondary suites.

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

Source: Derived from the Town of Oakville building permit data summarized by Watson & Associates Economist Ltd.

Against this market backdrop, attention turns to the locations best equipped to deliver the medium-density housing units identified in the Town-wide housing forecast. Within this broader context, S.G.A.s play a central role in supporting future medium-density housing opportunities. As discussed in Chapter 4, forecast demand for approximately 12,600 medium-density housing units has been identified across the Town between 2025 to 2051. Of this total, about 8,350 medium-density housing units are anticipated to be accommodated within S.G.A.s, representing roughly two-thirds of all medium-density housing growth.

As previously mentioned, S.G.A.s are intended to be Oakville's most dense and intensive areas, accommodating the majority of the Town's high-density housing and employment growth. This level of concentration is essential to support higher-order



transit, reduce automobile dependence and support the resident and employment thresholds necessary to support transit investment and ridership.

The Town's S.G.A.s are deliberately structured to evolve over time, making them suitable to accommodate a large portion of the Town's higher-density housing. Medium-density housing should be encouraged in S.G.A.s where it supports the planned role of the area, responds to surrounding built form, and advances a transition to adjacent lower-scale neighbourhoods. In particular, medium-density housing is appropriate on smaller blocks, infill sites, and lands set back from the most transit-critical frontages.

With this in mind, medium-density housing should not be broadly applied to all lands within S.G.A.s. Lands adjacent to major roads planned for higher-order transit and lands in and immediately around major transit station areas should prioritize the highest densities and the greatest employment intensity, as these are the locations that must accommodate the bulk of Oakville's long-term growth and transit-supportive development. In these locations, medium-density housing would not be the preferred form because it would reduce the amount of land available to achieve the density thresholds needed to support higher-order transit now and over the 2051 horizon.

As previously discussed, Chapter 2 identifies that the total medium-density housing supply opportunity within S.G.A.s is greater than the amount required by the forecast. S.G.A.s contain potential for more than 16,330 medium-density housing units, which is significantly higher than the demand for 8,350 housing units identified over the 2051 planning horizon. Having more opportunities available than what is required is advantageous because the intensification analysis is inherently speculative and influenced by market conditions, landowner intentions, and changing development feasibility. A broader range of opportunities provides the Town with flexibility over the long-term and helps ensure that if some sites do not develop as anticipated, there are still sufficient locations available to achieve the medium-density housing forecast.

3.3 Town of Oakville Residential Building Permit Trends with S.G.A.s and Remaining Residential Areas

Figure 11 summarizes historical residential development activity by S.G.A. and Residential Area, and Figure 12 illustrates the share of housing growth between S.G.A. and the Residential Area. For detailed information about each S.G.A., please refer to Appendix E.

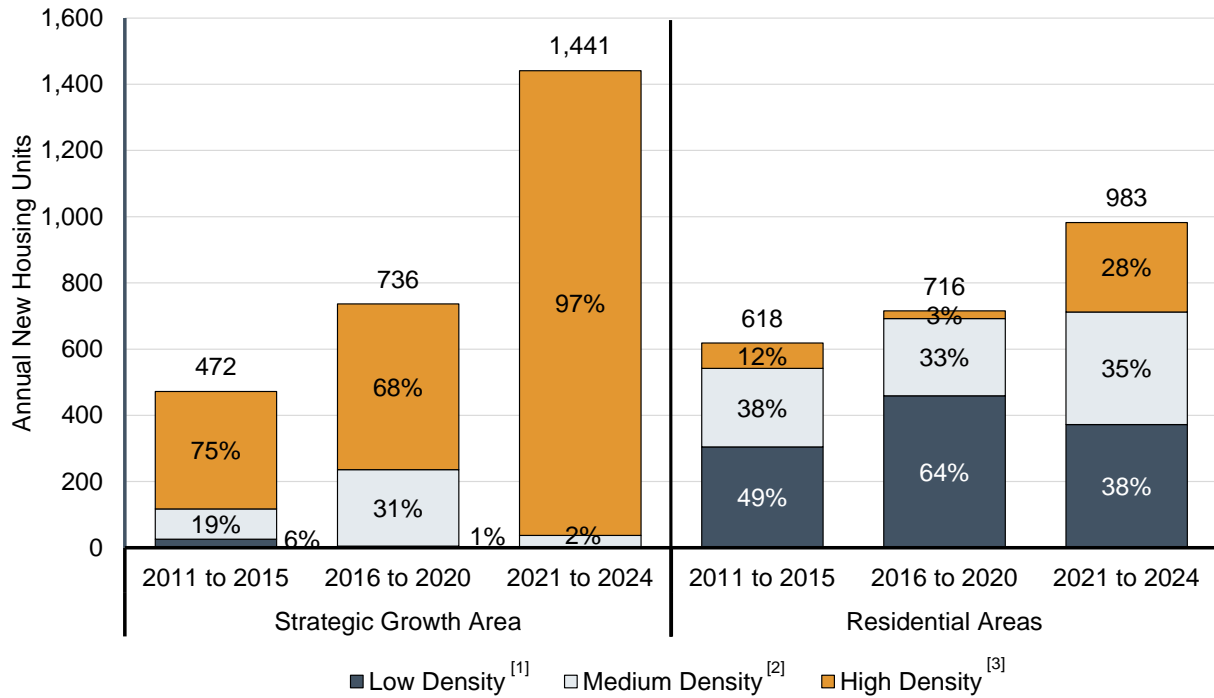


Key observations include:

- The S.G.A.s experienced increasing residential development activity from 2011 to 2024, with annual average permits issued for new housing units averaging 471 during the 2011 to 2015 period, then more than tripling to 1,441 between 2021 and 2024.
- Average annual new units in the S.G.A. also exceeded those of Residential Areas in the 2016 to 2024 period. Over the 2011 to 2024 period, new residential units in the S.G.A. accounted for 57% of new units in the Town of Oakville.
- New housing units in Residential Areas remained steady from 2011 to 2024, increasing from 618 to 983 over the three historical periods examined.
- The S.G.A.s with the most residential building permit activity from 2011 to 2024 were Trafalgar Urban Core South, Palmero Village, and Dundas Urban Core West.
- The Residential Areas that had the most development activity during this historical period included Oakville North Central and Oakville West, making up 77% of all building permit activity in the Residential Areas.
- Between 2011 and 2020, S.G.A. experienced an uptick in medium-density development. However, in the most recent period (2021 to 2024) medium-density development accounted for only 2% of the housing. Building on the previous discussion in section 3.2.1, planning policies and other tools which emphasize and encourage an increase in the share of medium-density housing forms in S.G.A.s are encouraged, where appropriate.



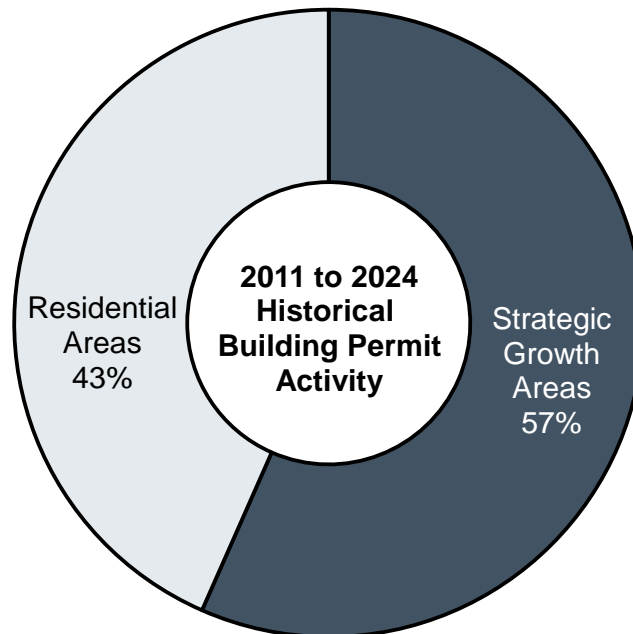
Figure 11
Town of Oakville
Housing Growth by Area, 2011 to Year-to-Date 2024



Note: 2024 reflects building permits until the end of June 2024.
 Source: Town of Oakville building permit data summarized by Watson & Associates Economists Ltd.



Figure 12
Town of Oakville
Housing Growth Share by Area, 2011 to Year-to-Date 2024



Note: 2024 reflects building permits until the end of June 2024.

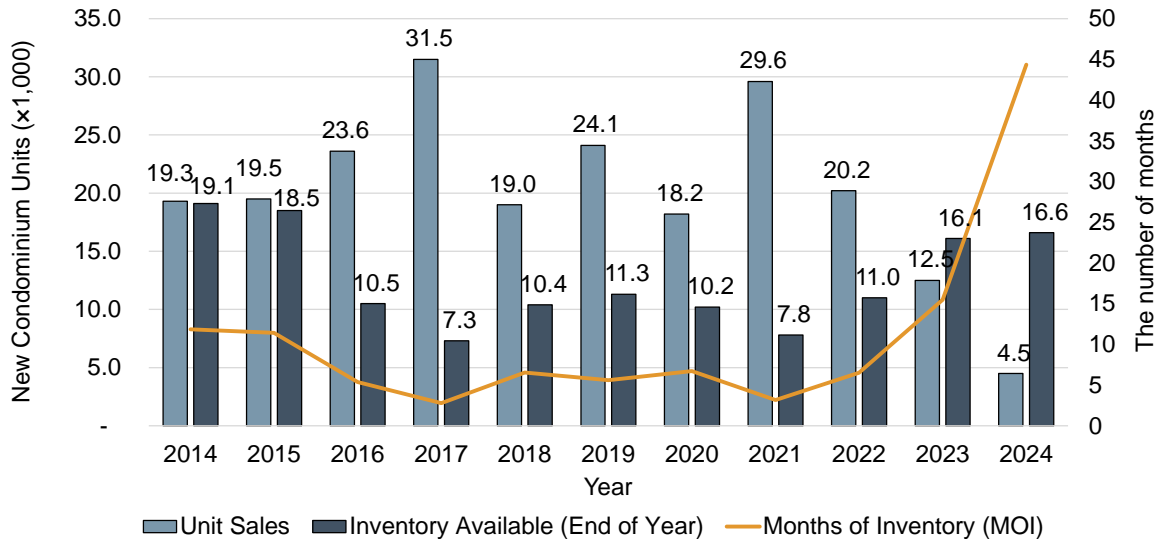
Source: Town of Oakville building permit data summarized by Watson & Associates Economists Ltd.

3.3.1 Planning in the Face of an Evolving Regional High-Density Housing Market

Over the past decade, the condominium market in the Greater Toronto Area (G.T.A.) has experienced significant development and sales activity, as illustrated in Figure 13. Market conditions have softened in recent years; however, with new unit sales in 2024 reaching their lowest levels since the mid-1990s and unsold inventory at record highs. This slowdown reflects broader regional trends, where high-density condominium demand remains sluggish, despite population growth and long-term housing needs continuing to support its viability. In contrast, demand for purpose-built rental housing has strengthened over the past year, reflecting a shift in investor sentiment and affordability constraints in the ownership market.



Figure 13
Greater Toronto Area
New Condominium Market



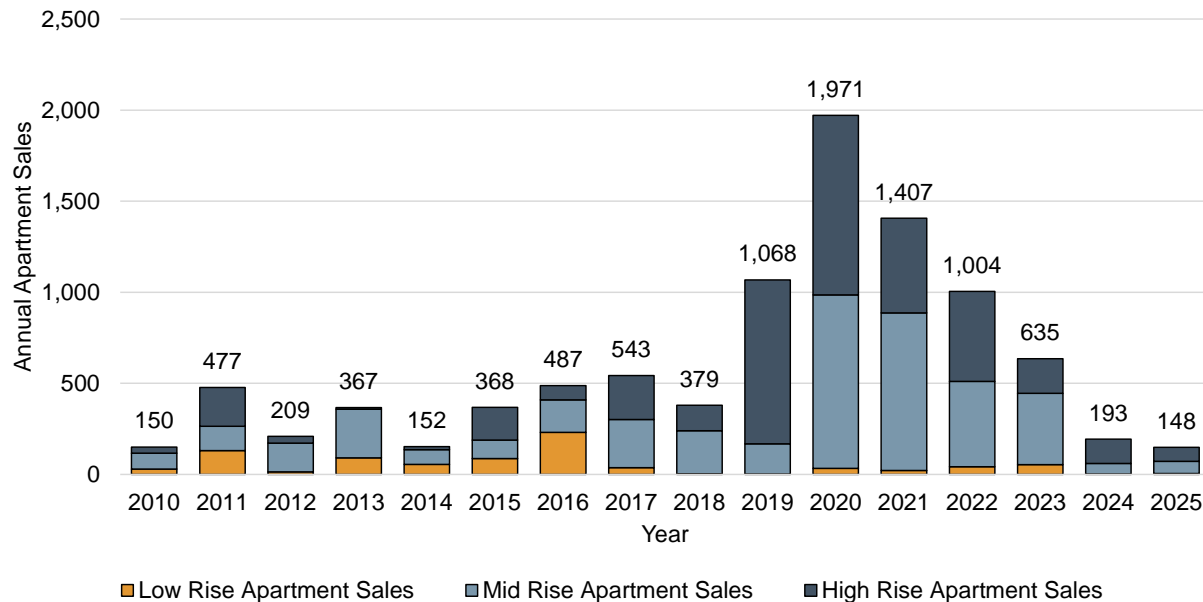
Source: Driven from Altus Data Studio by Watson & Associates Economists Ltd.

Similar market trends have been observed in the local Oakville condominium market. As noted in the Phase 1 report, Oakville has experienced significant growth in the condominium development market over the past decade. During the peak of the coronavirus disease (COVID-19) pandemic between 2021 and 2022, the Town averaged 2,400 high-density building permits per year.^[21] Since this peak period, average high-density housing levels have notably declined to an average of 1,900 between 2023 and 2024 year-to-date. Figure 14 shows recent data regarding high-density condominium presales in Oakville, which further illustrates that the recent weakness in the condo market is anticipated in the near term.

^[21] See Figure 4-4 of the 2024 Town of Oakville Growth Analysis Final Report.



Figure 14
Town of Oakville
Annual Sales by Apartment Type



Note: Figures have been rounded.

Source: Data derived from Altus Data Studio for the Town of Oakville, summarized by Watson & Associates Economist Ltd.

Achieving a balanced housing mix across all of Oakville, not just within S.G.A.s, remains a key objective. The Town's Housing Strategy and Action Plan identifies high-density housing as Oakville's most under-represented type, comprising only about 12% of the total supply compared to approximately 24% for medium-density housing. SGAs are specifically designated to accommodate most of the Town's high-density growth, helping correct this imbalance.^[22]

As noted in the Phase 1 Growth Analysis Study, the average number of new high-density housing units constructed in Oakville over the next three decades is forecast to increase relative to historical trends experienced over the past two decades. However, it is unlikely that the Town will experience sustained levels of new high-density housing development over the long-term that will exceed the peak construction levels the Town experienced during the height of the pandemic. Within the high-density housing market,

^[22] Town of Oakville Housing Strategy and Action plan, Approved with modifications by P&D Council, December 9, 2024.



a steady increase in demand for high-density rental housing is anticipated within the Town to accommodate increased needs associated with the Town's growing population of low and middle-income households. Currently, the Town is experiencing a shortage of affordable rental housing accommodations.^[23] This emphasizes the continued need for a greater supply of non-market and market rental housing options (including both primary and secondary rental high-density accommodations and secondary units) as well as ownership condominiums to address future high-density housing demand across all ages and income groups.

3.3.2 Rental Housing Market

The inventory of rental housing options in the Town of Oakville is moderately diverse and is represented by a spectrum of different building typologies, dwelling unit sizes, and geographic locations. The rental market for various dwelling options is structured similarly to that of other communities in Canada, as Oakville's rental market is characterized by both a primary and secondary market, described below:

- **Primary rental market** – The Canada Mortgage and Housing Corporation identifies the primary rental market as structures that have at least three rental units. These properties are typically operated by an owner, manager, or building superintendent.
- **Secondary rental market** – The Canada Mortgage and Housing Corporation identifies rented condominiums, subsidized rental housing, and rentals in structures of less than three units as part of the secondary rental market. In fact, all rentals – except privately initiated, purpose-built rental structures of three units or more – are included in the secondary rental market.

According to the Town's recent Housing Needs Assessment, as of 2021, the rental market supply for both primary and secondary units within the Town of Oakville is approximately 16,530 dwellings. This includes approximately 5,183 units (31%) in the primary rental market, in addition to approximately 11,347 units (69%) in secondary-market housing categories.^[24]

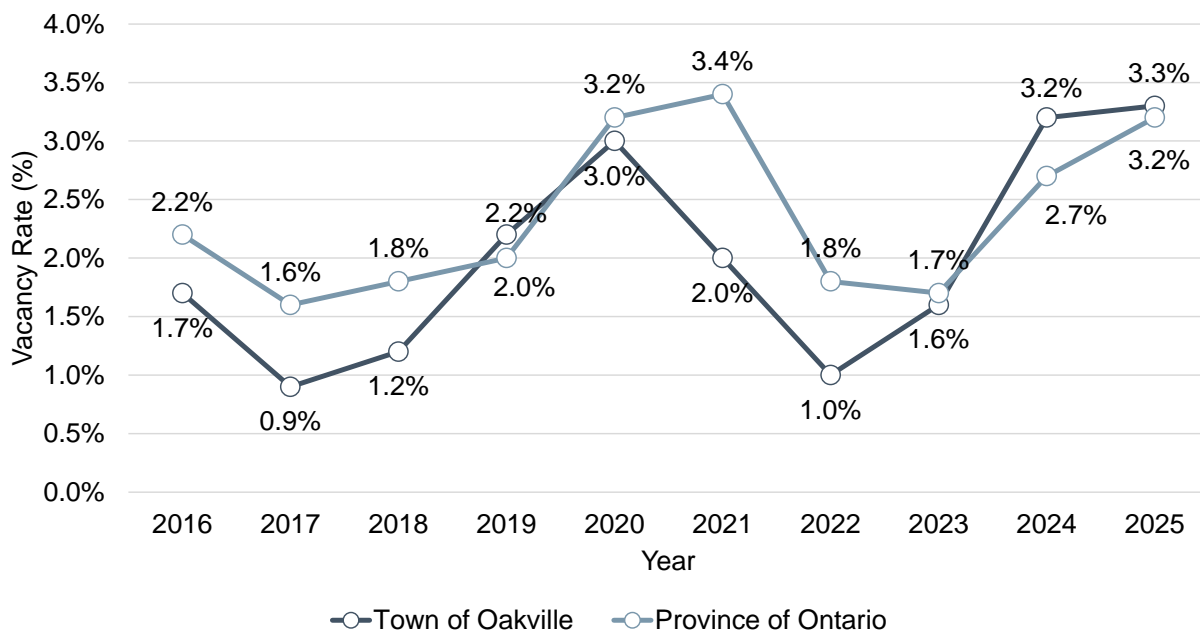
^[23] Town of Oakville Housing Needs Assessment, Preliminary Report, April 2025.

^[24] Statistics Canada Census, 2021, and Canada Mortgage and Housing Corporation rental market data.



Figure 15 provides a summary of average rental vacancy rates for one-, two- and three-bedroom apartments in the primary rental market over the past decade. Oakville's vacancy rate has been below the provincial average, even when accounting for the temporary increase in vacancies during the COVID-19 pandemic. Since 2022, Oakville's vacancy rate has risen from 1.0% to a decade high of 3.3% in 2025. While this modest increase suggests a temporary easing of tight rental conditions, it may also indicate that new supply is beginning to outpace short-term demand in certain segments. Over the longer term, maintaining a moderate vacancy rate is essential for market balance, as it supports tenant mobility, prevents excessive rent escalation, and ensures that new housing development continues to align with evolving demand patterns.

Figure 15
Town of Oakville
Historical Vacancy Rates, 2016 to 2025



Source: Derived from Canada Mortgage and Housing Corporation Housing Market data by Watson & Associates Economists Ltd.

According to the Town's recent Housing Needs Assessment, between 2016 and 2021, renter households grew at a faster rate (36.2%) than owner-occupied households (5.3%).^[25] This growth reflects both increased consumer interest in higher-density living

^[25] Town of Oakville Housing Needs Assessment, Preliminary Report, April 2025.



and the broader regional shift towards more compact housing forms as affordability challenges persist. Furthermore, the Housing Needs Assessment identified key housing gaps, noting the need for more affordable, purpose-built rental housing and the need to diversify the housing stock, as the existing housing stock is inconsistent with current household sizes and typologies.



4. Town of Oakville Population, Housing, and Employment Allocations

This chapter provides a detailed analysis of forecast population and housing growth within the Town of Oakville by S.G.A.s and Residential Areas to the year 2051. For additional details, please refer to Appendix E. Figure 1, identified in subsection 2.1.1, provides a key map of the Town's S.G.A.s and Residential Areas within the Town of Oakville.

4.1 Growth Allocations Methodology

The technical analysis supporting R.O.P.A. 49 established population and employment forecasts at a municipal-wide and policy area level (i.e., Built-Up Area (B.U.A.) and Designated Growth Area (D.G.A.) for each Area Municipalities in Halton Region. Following the release of R.O.P.A. 49, the J.B.P.E.s provided a more detailed breakdown of growth by S.G.A. and Residential Area, premised on a more robust long-term growth outlook for each of the Area Municipalities in Halton. The J.B.P.E forecast has been used as a comparative reference to the detailed growth allocations in this Phase 2 Study. The population, housing, and employment growth allocations by S.G.A.s and Residential Areas were developed based on a detailed review of the following local supply and demand factors:

Local Supply Factors

- Supply of potential future housing stock in the development process by housing structure type and approval status;
- An in-depth review of intensification opportunities within the Town's S.G.A.s.
- Planned residential and non-residential development within the Town's Secondary Plans; and
- Provincial, regional and local policy direction regarding forecast residential growth by broader planning policy area (i.e., S.G.A.s, Residential Area, Employment Area, and Commercial Area).

Demand Factors

- Historical residential building permit activity (new housing units only) by housing structure type from 2011 to 2024 by S.G.A. and Residential Area;



- Anticipated timing of active development applications in the development process by housing unit structure type and approval status; and
- Anticipated demand for residential and non-residential intensification within the context of regional demographic and real estate trends.

4.2 Population Growth Allocations

Figure 16 summarizes the allocation of population growth by S.G.A.s and the remaining residential area between 2025 and 2051 (please refer to Figure 1). As identified in the Phase 1 report, the Town of Oakville is projected to accommodate approximately 1,500 high-density residential units annually over the 2021 to 2051 period. This represents roughly 60% fewer units than forecast in the J.B.P.E.s. Comparatively, the Town of Oakville Phase 1 and 2 Growth Analysis Studies forecast less high-density development (to varying degrees) to all S.G.A.s within Oakville. This reduction in high-density housing is the primary reason for the lower long-term population and housing growth outlook for the Town in the Phase 1 Growth Analysis study relative to the J.B.P.E.s. For additional details, please refer to Appendix E through Appendix G.^{[26],[27]} Key assumptions are as follows:

- Over the 2025 to 2051 planning horizon, the Town's S.G.A.s. are forecast to accommodate just under 59% of the Town-wide population growth, with 93,900 people planned within this area;
- The Residential Area is forecast to accommodate 41% of the Town-wide population growth, representing an additional 65,600 people; and
- Over the next three decades, the Town of Oakville is projected to grow at an average annual rate of 1.9%, with S.G.A.s growing at 4.7% annually and Residential Areas growing at 1.0% annually. By comparison, the J.B.P.E.s assume a higher annual growth rate of 6.0%, while growth within Residential Areas remains generally consistent.

^[26] Refers to Appendix F: Town-wide Population, Housing and Employment Scenarios, figure includes apartments and accessory units.

^[27] J.B.P.E. forecast derived from Halton Region's Joint Best Planning Estimates for the Town of Oakville.



Figure 16
Town of Oakville
Population Growth by Policy Area, 2025 to 2051

Policy Area	Growth Area	Population Growth ^[1]	Percentage Share of Population
Strategic Growth Areas	Bronte GO M.T.S.A. Bronte Village Downtown Oakville Dundas Urban Core East Dundas Urban Core West Hospital District Kerr Village Midtown Oakville Neyagawa Urban Core Palermo Village Trafalgar Corridor Trafalgar Urban Core (N) Trafalgar Urban Core (S) Uptown Core ^[2]	93,900	59%
Residential Areas	Oakville Central Oakville East Oakville North Central Oakville North East Oakville North West Oakville South East Oakville South West Oakville West	65,600	41%
Town of Oakville	-	159,600	100%

^[1] Population figures include net Census undercount.

^[2] Please note that due to different boundaries, the total population estimated in the Uptown Core Growth Area review differs from what is presented herein.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Forecast summarized by Watson & Associates Economists Ltd.



4.3 Housing Growth by Structure Type by Area

Figure 17 summarizes the housing growth potential by Development Areas (please refer to Figure 1 for a map of these areas). Key assumptions are as follows:

- Close to two-thirds of forecast housing growth in the Town is expected to be accommodated in S.G.A.s, accounting for 39,440 housing units between 2025 and 2051. Of this total, 79% of housing is forecast in high-density forms, which also comprises 79% of the Town-wide long-term high-density housing forecast.
- Residential Areas are expected to accommodate 34% of the Town-wide housing growth, with approximately 20,080 new housing units to be constructed over the 2025 to 2051 period in these areas; and
- Almost all forecast low-density housing is anticipated to be accommodated in Residential Areas.



Figure 17
Town of Oakville
Housing Growth by Area, 2025 to 2051

Development Area	Growth Areas	Total Unit Supply Potential ^[1]	2025 to 2051 Housing Growth				
			Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Total Units	Share of Town-wide Total
Strategic Growth Areas	Bronte GO M.T.S.A. Bronte Village Downtown Oakville Dundas Urban Core East Dundas Urban Core West Hospital District Kerr Village Midtown Oakville Neyagawa Urban Core Palermo Village Trafalgar Corridor Trafalgar Urban Core (N) Trafalgar Urban Core (S) Uptown Core ^[5]	79,480	90	8,350	30,990	39,440	66%
Residential Areas	Oakville Central Oakville East Oakville North Central Oakville North East Oakville North West Oakville South East Oakville South West Oakville West	1,450 ^[6]	7,480	4,250	8,340	20,080	34%



Development Area	Growth Areas	Total Unit Supply Potential ^[1]	2025 to 2051 Housing Growth				
			Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Total Units	Share of Town-wide Total
Town of Oakville		80,930	7,570	12,600	39,330	59,520	100%

^[1] Includes residential development applications that are registered but no building permits issued, draft plan approved, currently in the site plan approval stage, proposed, and/or intensification opportunities.

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

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

^[4] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

^[5] Please note that, due to different boundaries, the total housing estimated in the Uptown Core Growth Area review differs from the one presented herein.

^[6] Includes residential development applications that are registered but no building permits issued, draft plan approved, currently in the site plan approval stage and/or proposed.

Notes: Figures have been rounded. M.T.S.A. means major transit station area.

Source: Units in development approvals provided by the Town of Oakville; 2025 to 2051 housing growth forecast prepared and summarized by Watson & Associates Economists Ltd.



4.4 Employment Growth Allocations by Development Area

Figure 18 summarizes the Town's total Community Area and Employment Area employment growth forecast by Development Area (please refer to Figure 1 for a map of these areas, for additional details regarding the employment forecast, please refer to Appendix F). Key findings are as follows:

- Employment within designated employment lands is forecast to accommodate approximately 44% of the Town's overall employment growth and a large share of the Town's Major Office jobs.
- Employment lands are forecast to capture 100% of the Employment Land Employment jobs in the forecast period.
- S.G.A.s are forecast to account for 39% of the Town's forecast employment growth from 2025 to 2051. This consists of Major Office (i.e. free standing offices greater than 1,860 sq.m or 20,000 sq.ft.) and Population-Related Employment (i.e., jobs associated with population growth, such as grocery stores, schools, and other retail and personal services).
- Over the 2025 to 2051 forecast period, Residential Areas are forecast to account for 14% of Town-wide employment growth. Employment in Residential Areas solely comprised Population-Related Employment.
- Commercial Areas are forecast to accommodate 3% of the Town-wide employment growth. Similar to Residential Areas, Commercial Areas are forecast to accommodate the Town's Population-Related Employment.



Figure 18
Town of Oakville
Employment Area Growth by Development Area, 2025 to 2051

Development Area	Growth Areas	Employment Growth ^[1]	% Share of Town of Oakville
Strategic Growth Area	Bronte GO M.T.S.A. Bronte Village Downtown Oakville Dundas Urban Core East Dundas Urban Core West Hospital District Kerr Village Midtown Oakville Neyagawa Urban Core Palermo Village Trafalgar Corridor Trafalgar Urban Core (N) Trafalgar Urban Core (S) Uptown Core ^[2]	28,000	39%
Residential Areas	Oakville Central Oakville East Oakville North Central Oakville North East Oakville North West Oakville South East Oakville South West Oakville West	10,500	15%
Commercial Area ^[3]	-	1,100	2%
Employment Lands ^[4]	Employment Areas Employment Generating and Supporting Areas	31,300	44%
Town of Oakville	-	70,900	100%

^[1] Employment figures include work at home and no fixed place of work.

^[2] Please note that, due to different boundaries, the employment estimates in the Uptown Core Growth Area review differ from those presented herein.

^[3] Please refer to Figure 1.

^[4] Employment lands comprise two designations: Employment Area and Employment Generating and Supporting Area. The Employment Areas are located along the provincial highways, including the Queen Elizabeth Way, Highway 403, and Highway 407.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Forecast summarized by Watson & Associates Economists Ltd.



5. Conclusions

The Phase 2 Growth Analysis Study serves as a foundational document to the Town's O.P and Secondary Plans by providing guidance with respect to where and how residential and non-residential development is planned and prioritized as the Town continues to mature and evolve over the near-, medium- and long-term planning horizon. Building on the Phase 1 Growth Analysis Study, this report establishes a comprehensive framework for directing growth to appropriate locations while supporting the Town's long-term objectives for complete, transit-supportive, and resilient communities. The analysis demonstrates that S.G.A.s will increasingly play a central role in accommodating future growth, capturing the majority of forecast population and new housing development, as well as a significant share of employment growth over the long-term planning horizon.

The residential intensification assessment identifies a supply of approximately 79,950 housing units and 2.36 million sq.m of non-residential G.F.A. within the Town's S.G.A.s, providing a robust supply to meet forecast demand while allowing flexibility in timing, market conditions, and built form outcomes. Residential and non-residential development is appropriately concentrated in larger, transit-oriented areas, such as Midtown Oakville and the Trafalgar Urban Core North and South. In contrast, smaller, established areas, including Downtown Oakville and Kerr Village, are expected to evolve through incremental infill that respects existing character and heritage considerations.

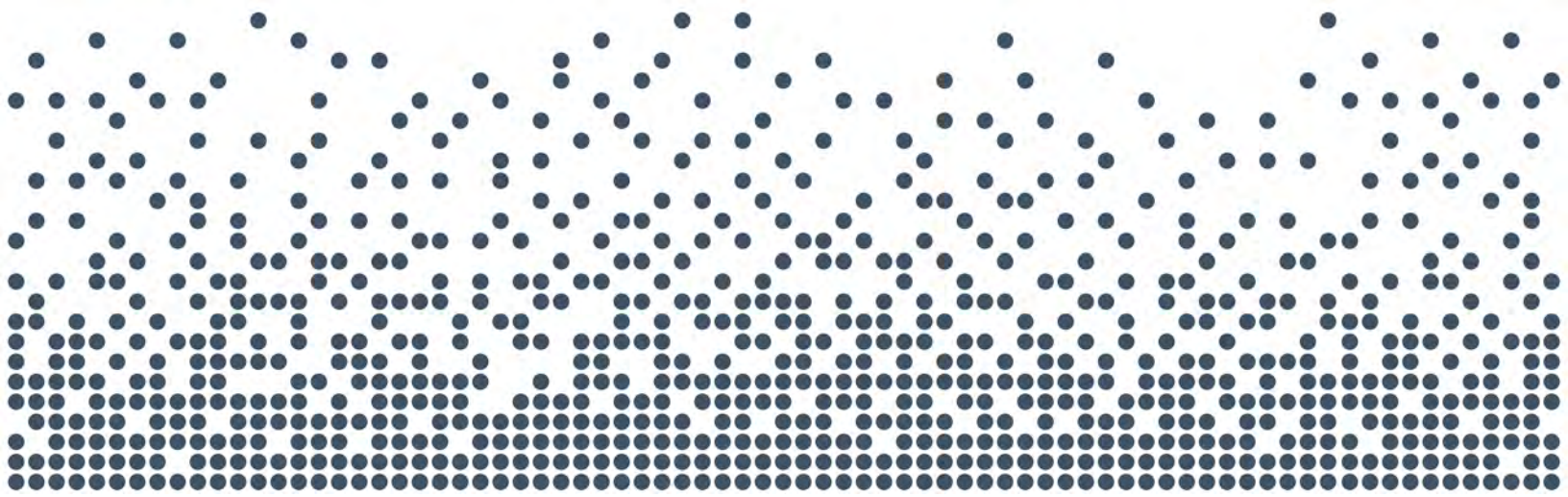
As identified in the Phase 1 Growth Analysis Study, achieving the Town's recommended longer-term population forecast will require a broad range of housing options by location, structure type/density and affordability to accommodate a growing and diverse population base by household type, size, income and age. Building on this direction, the results of this study emphasize the importance of encouraging, where appropriate, "missing middle" housing typologies throughout the Town's S.G.A.s., including townhouses, stacked townhouses, and low-rise apartments. These housing forms add gentle density, support affordability, and help balance the Town's supply against the diverse population that is anticipated to be attracted to the Town over the next three decades.



The growth allocations set out in this report reflect a balanced approach that aligns anticipated near-term and longer-term market demand for residential and non-residential development with existing and planned infrastructure, transit investment, and community services. Residential Areas continue to accommodate a meaningful share of population and housing growth, including almost all new low-density housing. Employment Areas remain the primary location for industrial employment growth, while a share of Major Office uses is also identified on employment lands, where appropriate. S.G.A.s support a mix of residential, commercial, institutional, and employment functions, reinforcing their role as mixed-use centres and key contributors to the Town's economic vitality.

This Phase 2 Growth Allocations and Residential Intensification Study confirms that Oakville has a sufficient land supply and intensification potential in low-, medium- and high-density housing forms to accommodate forecast housing growth to the year 2051 and beyond in a manner that aligns anticipated market demand with the Town's policy objectives for compact, transit-oriented, and complete communities.

Importantly, this study recognizes that Oakville's land use and urban structure plan must accommodate growth well beyond the 2051 planning horizon. The Town's relatively fixed urban boundaries underscore the need for a robust urban structure policy framework that supports ongoing growth and maturation over time, while balancing residential and non-residential land uses and discouraging the removal of Employment Areas to accommodate non-employment land uses. Existing residents and newcomers moving to Oakville will find ample housing opportunities to accommodate their housing needs for the coming decades, not only within S.G.A.s but also in developing greenfield areas and through intensification in established Residential Areas.



Appendices



Appendix A

Town of Oakville Population, Household, and Employment Forecast Comparison



Appendix A: Town of Oakville Population, Household, and Employment Forecast Comparisons

Prior to the Phase 1 Growth Analysis Study, two major growth studies were completed. As part of the Region's Official Plan (O.P.) review, Halton Region undertook a growth strategy to plan for population, housing, and employment growth to 2051 in accordance with provincial planning requirements. This work, known as the Halton Region Integrated Growth Management Strategy (I.G.M.S.), provided a comprehensive assessment of the Region's long-term growth outlook and evaluated four long-range growth concepts to the year 2051. Each concept examined alternative assumptions related to residential intensification and greenfield density across the Area Municipalities within the context of provincial planning policy.

In November 2022, Halton Region adopted R.O.P.A. 49, which established growth direction for the Region and its Area Municipalities to 2051, while allocating housing growth only to 2041.^[28] Through this process, R.O.P.A. 49 concluded that no urban boundary expansion was required for the Town of Oakville, as all forecast housing growth could be accommodated within the existing urban boundary.

^[28] Modified Preferred Growth Concept Land Needs Assessment for the Region of Halton, March 2022, prepared by Hemson Consulting Ltd.



Figure A-1
Town of Oakville
R.O.P.A. 49 Housing Units

Year	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total
2021	45,700	13,600	14,300	73,600
2031	50,900	17,600	27,700	96,200
2041	54,900	21,200	41,900	118,000
2051	-	-	-	-
2021 to 2041	9,200	7,600	27,600	44,400

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

Note: Figures have been rounded.

Source: Derived from the Modified Preferred Growth Concept Land Needs Assessment for the Region of Halton, March 2022, summarized by Watson & Associates Economists Ltd.

Following the completion of the I.G.M.S. and adoption of R.O.P.A. 49, the Region initiated the Joint Population, Housing, and Employment (J.B.P.E.) update in fall 2023. The primary purpose of the J.B.P.E. was to inform the Region's ongoing infrastructure master planning work. The J.B.P.E. anticipates significantly stronger population growth over the next 10 years across all Area Municipalities, consistent with the municipal housing pledges established through Bill 23.

Figure A-2 summarizes the J.B.P.E. housing forecast for the Town of Oakville by structure type. Under this forecast, the Town is expected to accommodate approximately 98,800 new housing units between 2021 and 2051. Of this total, low-density units account for 12%, medium-density units for 14%, and the majority of new housing is anticipated to be in high-density forms, accounting for approximately 74% of total growth.

Figure A-3 presents the housing growth assumptions developed through the Phase 1 Growth Analysis. Notably, this analysis forecasts approximately 8,500 new low-density units between 2021 and 2051, which is lower than the low-density growth anticipated through both R.O.P.A. 49 and the J.B.P.E. forecasts. This reflects a greater reliance on medium- and high-density housing forms to accommodate long-term growth within the Town of Oakville, which is further explained in Chapter 4.



Figure A-2
Town of Oakville
J.B.P.E. Housing Units

Year	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total
2021	46,700	12,400	14,400	73,500
2031	51,400	17,900	38,600	107,900
2041	56,700	22,100	63,900	142,700
2051	58,400	25,900	88,000	172,300
2021 to 2041	10,000	9,700	49,500	69,200
2021 to 2051	11,700	13,500	73,600	98,800

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

Note: Figures have been rounded.

Source: Halton Region's J.B.P.E. for the Town of Oakville, summarized by Watson & Associates Economists Ltd.

Figure A-3
Town of Oakville
Phase 1 Growth Analysis Housing Units

Year	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total
2021	46,500	13,500	13,600	73,600
2031	50,100	18,200	28,900	97,200
2041	53,000	23,400	44,400	120,800
2051	55,000	27,000	59,700	141,700
2021 to 2041	6,500	9,900	30,800	47,200
2021 to 2051	8,500	13,500	46,100	68,100

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

Note: Figures have been rounded.

Source: Derived from the Town of Oakville Phase 1 Growth Analysis Study, November 2024, summarized by Watson & Associates Economists Ltd.



Figure A-4
Town of Oakville
Population Comparison

Year	R.O.P.A. 49	Phase 1 Growth Analysis	J.B.P.E.
2021	222,000	222,060	220,100
2031	278,410	284,290	296,200
2041	313,460	342,410	378,000
2051	349,990	387,810	442,900
2021 to 2041	91,460	120,350	157,900
2021 to 2051	127,990	165,750	222,800

Note: Population includes net Census undercount and figures have been rounded.
Source: Derived from the Modified Preferred Growth Concept Land Needs Assessment for the Region of Halton, March 2022; Town of Oakville Phase 1 Growth Analysis Study, November 2024; and the Halton Region's J.B.P.E. for the Town of Oakville, summarized by Watson & Associates Economists Ltd.

Figure A-5
Town of Oakville
Employment Comparison

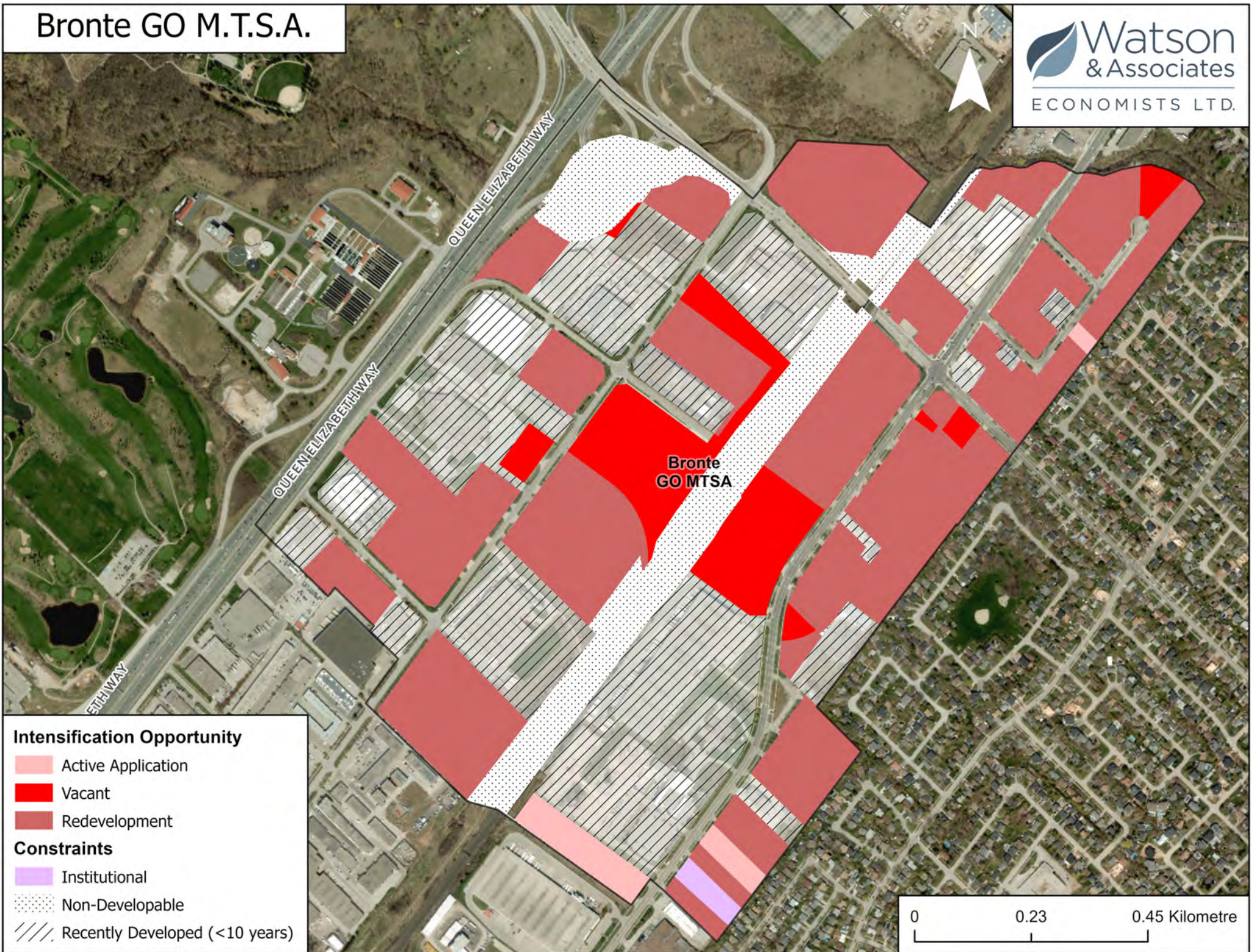
Year	R.O.P.A. 49	Phase 1 Growth Analysis	J.B.P.E.
2021	110,800	117,000 ^[1]	110,800
2031	138,500	138,380	147,100
2041	161,100	167,500	183,200
2051	181,100	190,670	212,100
2021 to 2041	50,300	50,500	72,400
2021 to 2051	70,300	73,670	101,300

^[1] Phase 1 Growth Analysis report only provides a 2024 base.
Note: Population includes net Census undercount and figures have been rounded.
Source: Derived from the Modified Preferred Growth Concept Land Needs Assessment for the Region of Halton, March 2022; Town of Oakville Phase 1 Growth Analysis Study, November 2024; and the Halton Region's J.B.P.E. for the Town of Oakville, summarized by Watson & Associates Economists Ltd.



Appendix B

Intensification Maps



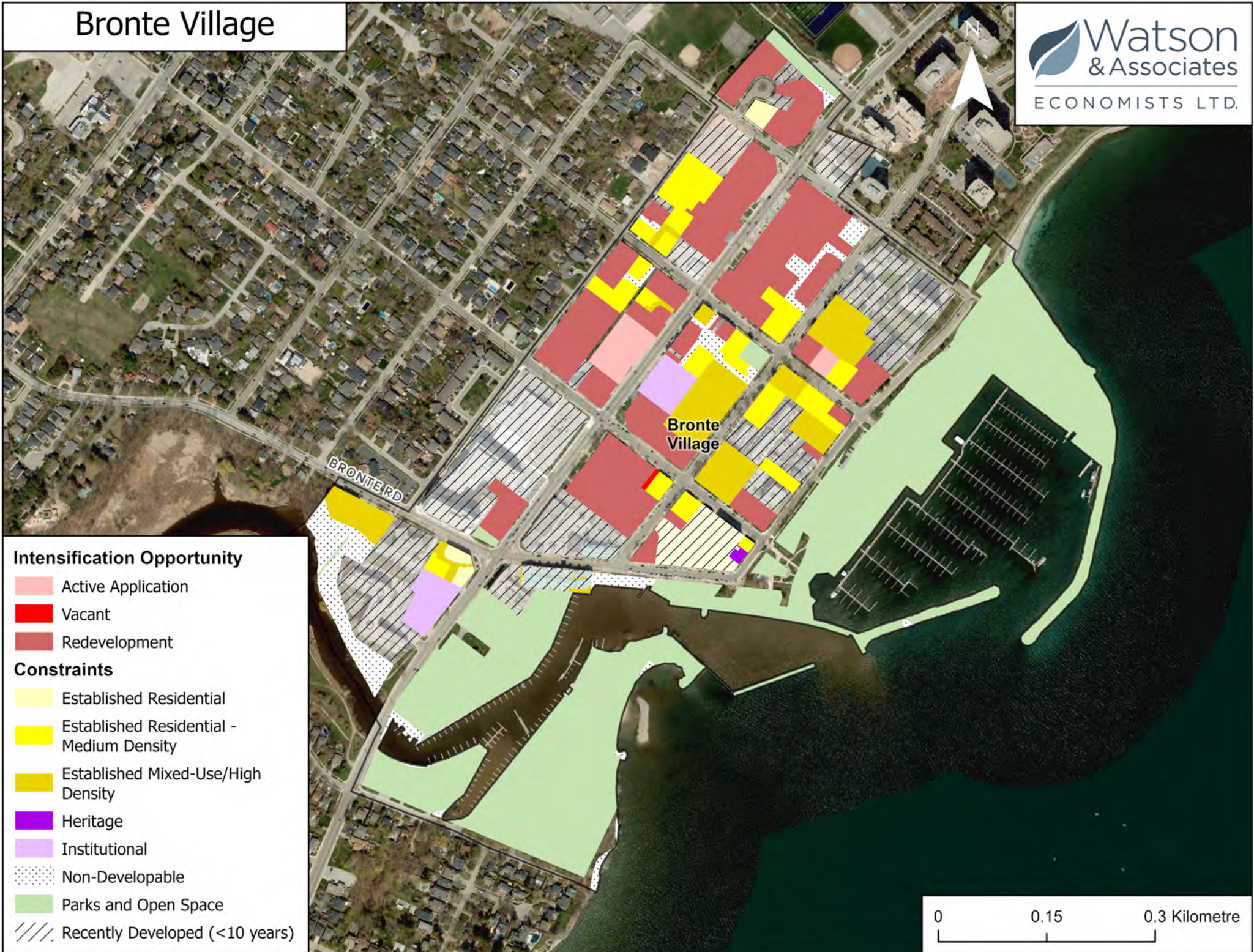
Intensification Opportunity

- Active Application
- Vacant
- Redevelopment

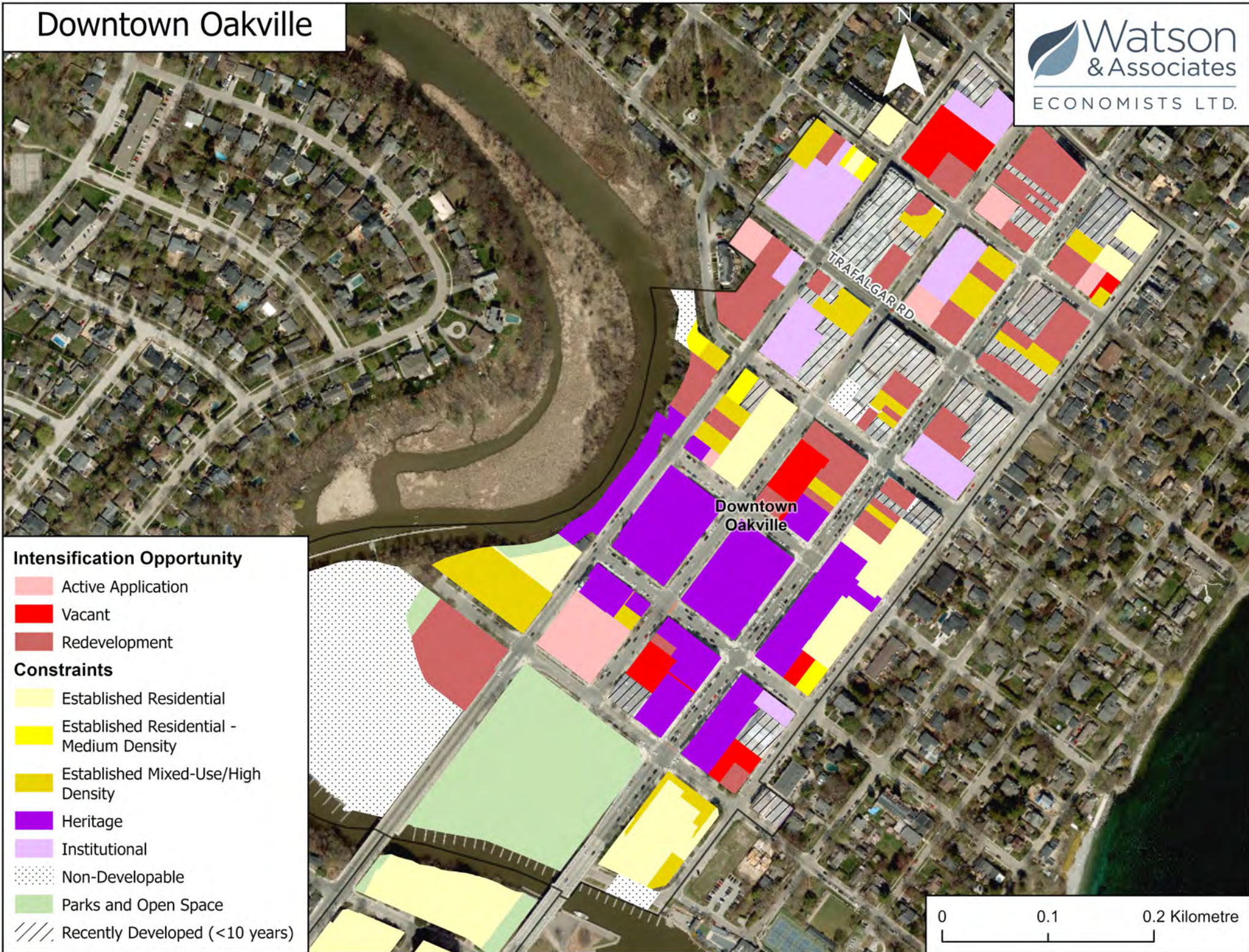
Constraints

- Institutional
- Non-Developable
- Recently Developed (<10 years)

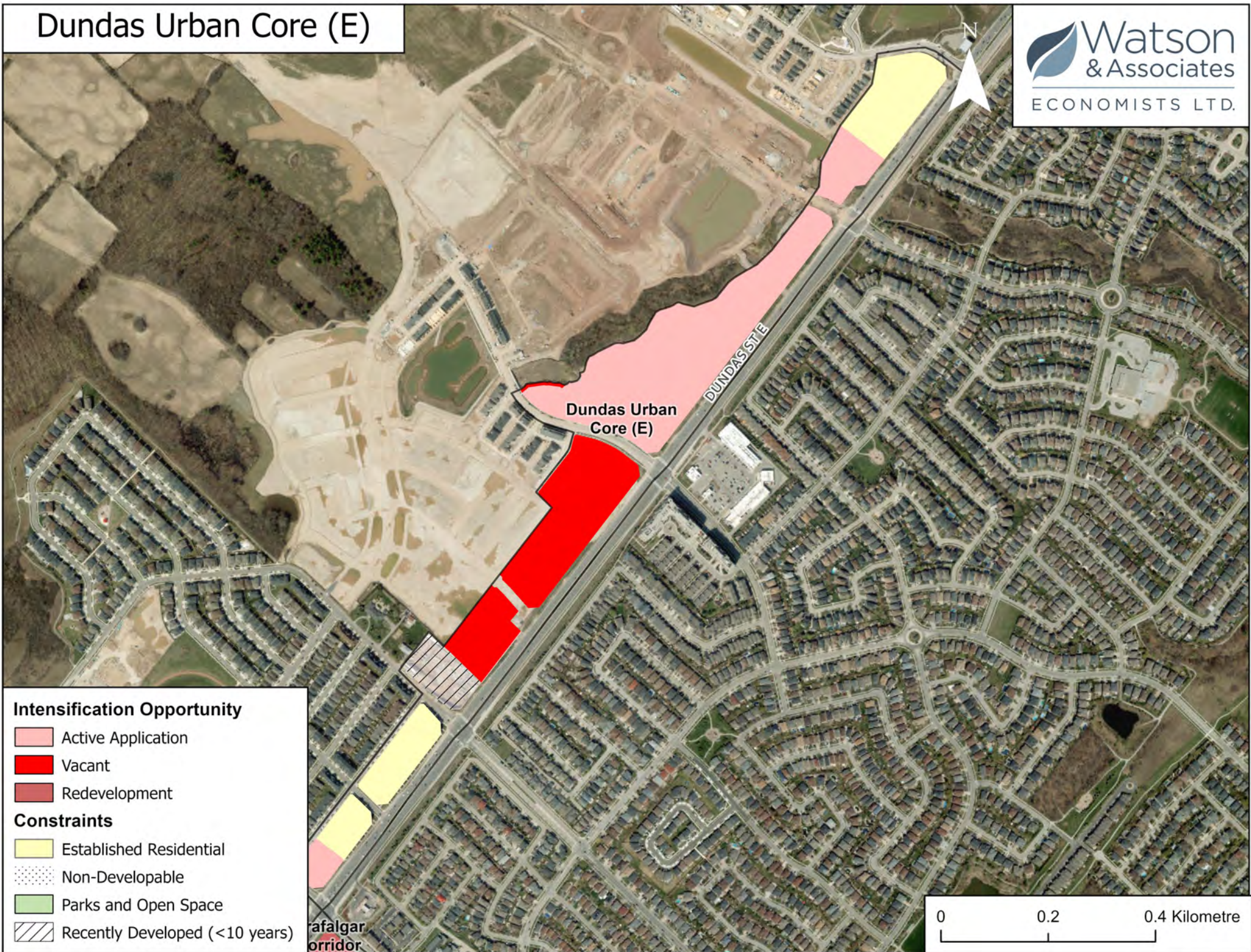
Bronte Village



Downtown Oakville



Dundas Urban Core (E)



Intensification Opportunity

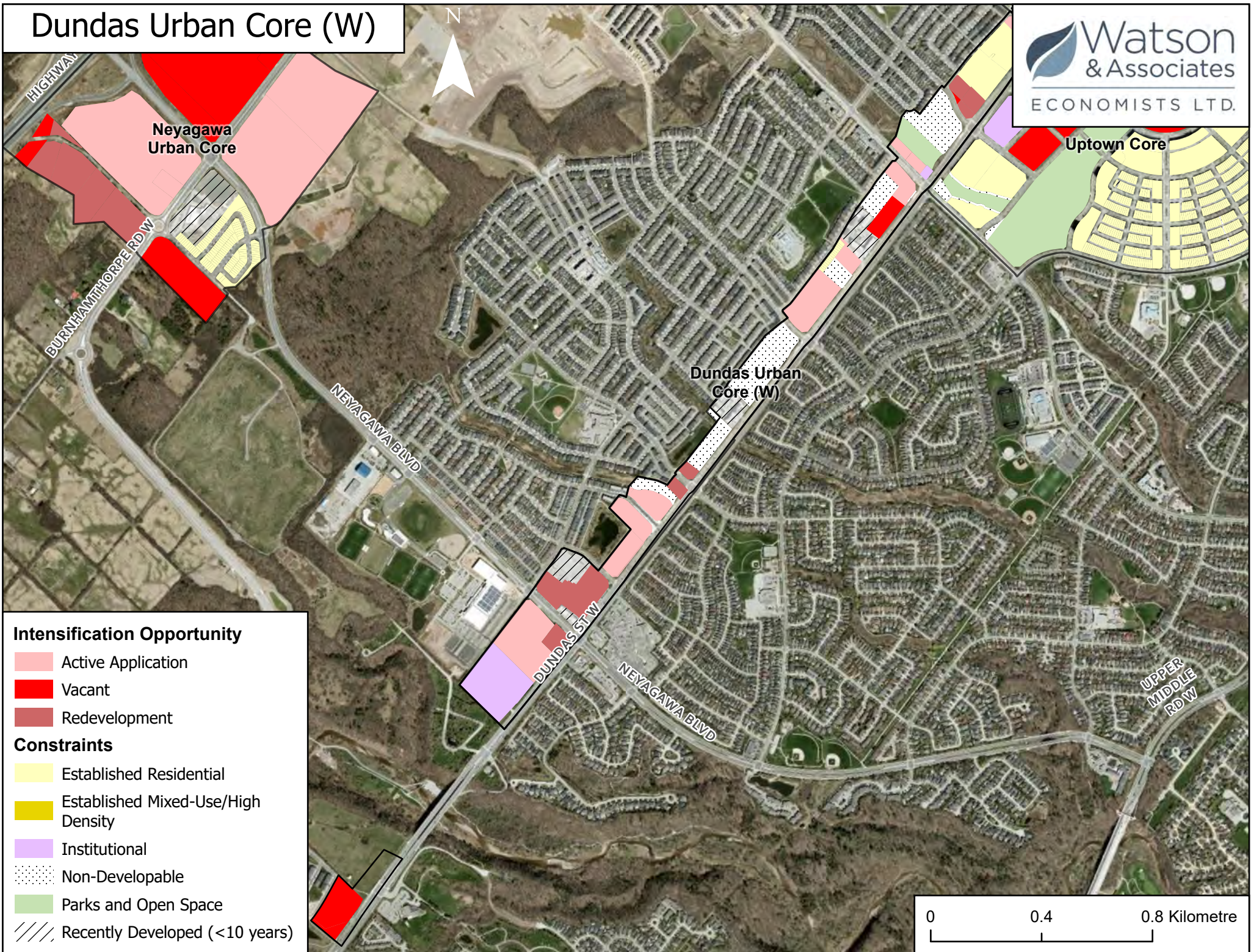
-  Active Application
-  Vacant
-  Redevelopment

Constraints

-  Established Residential
-  Non-Developable
-  Parks and Open Space
-  Recently Developed (<10 years)

afalgar
corridor.

Dundas Urban Core (W)



Neyagawa Urban Core

Uptown Core

Dundas Urban Core (W)

Intensification Opportunity

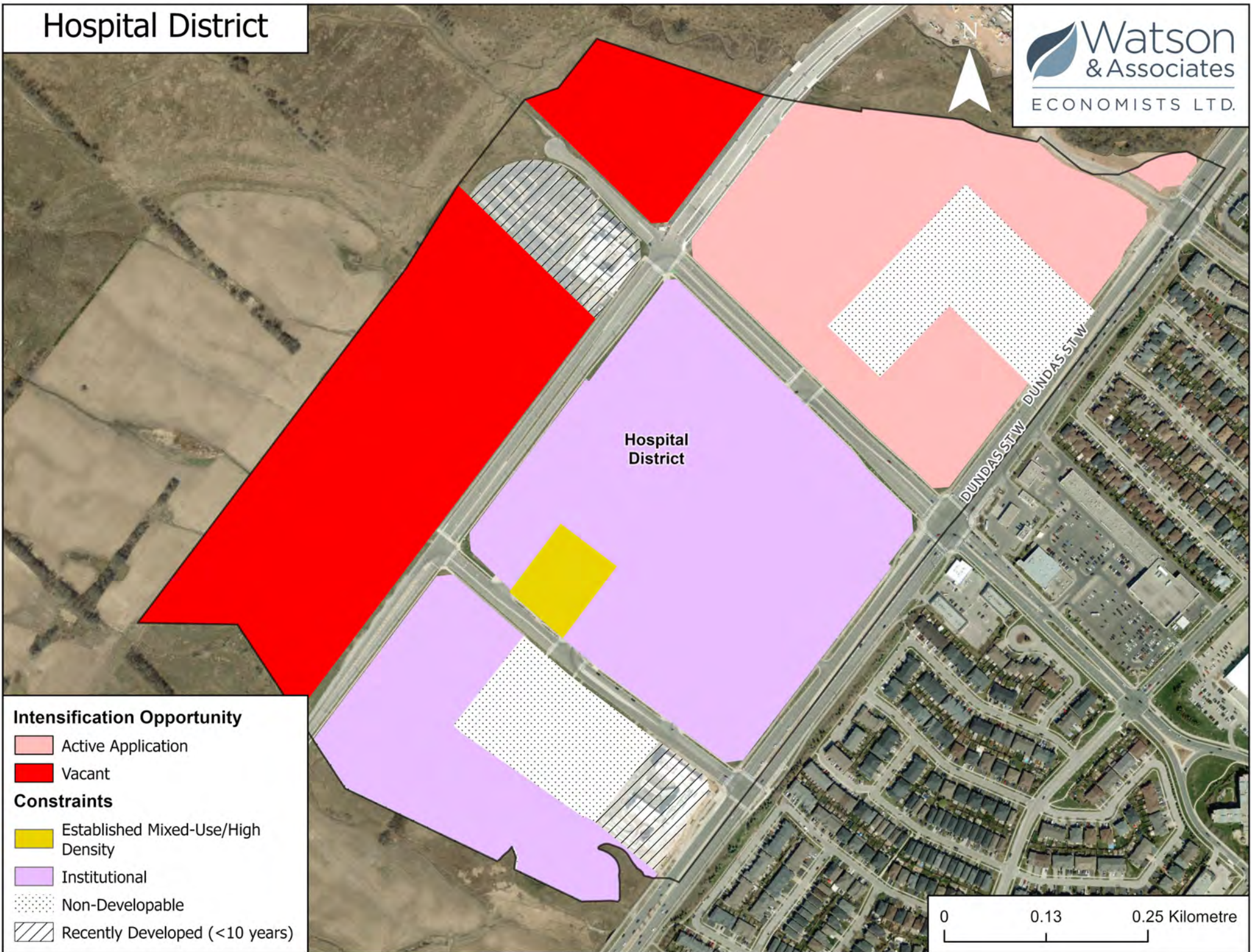
- Active Application
- Vacant
- Redevelopment

Constraints



- Established Residential
- Established Mixed-Use/High Density
- Institutional
- Non-Developable
- Parks and Open Space
- Recently Developed (<10 years)

0 0.4 0.8 Kilometre

Hospital District



Intensification Opportunity

-  Active Application
-  Vacant

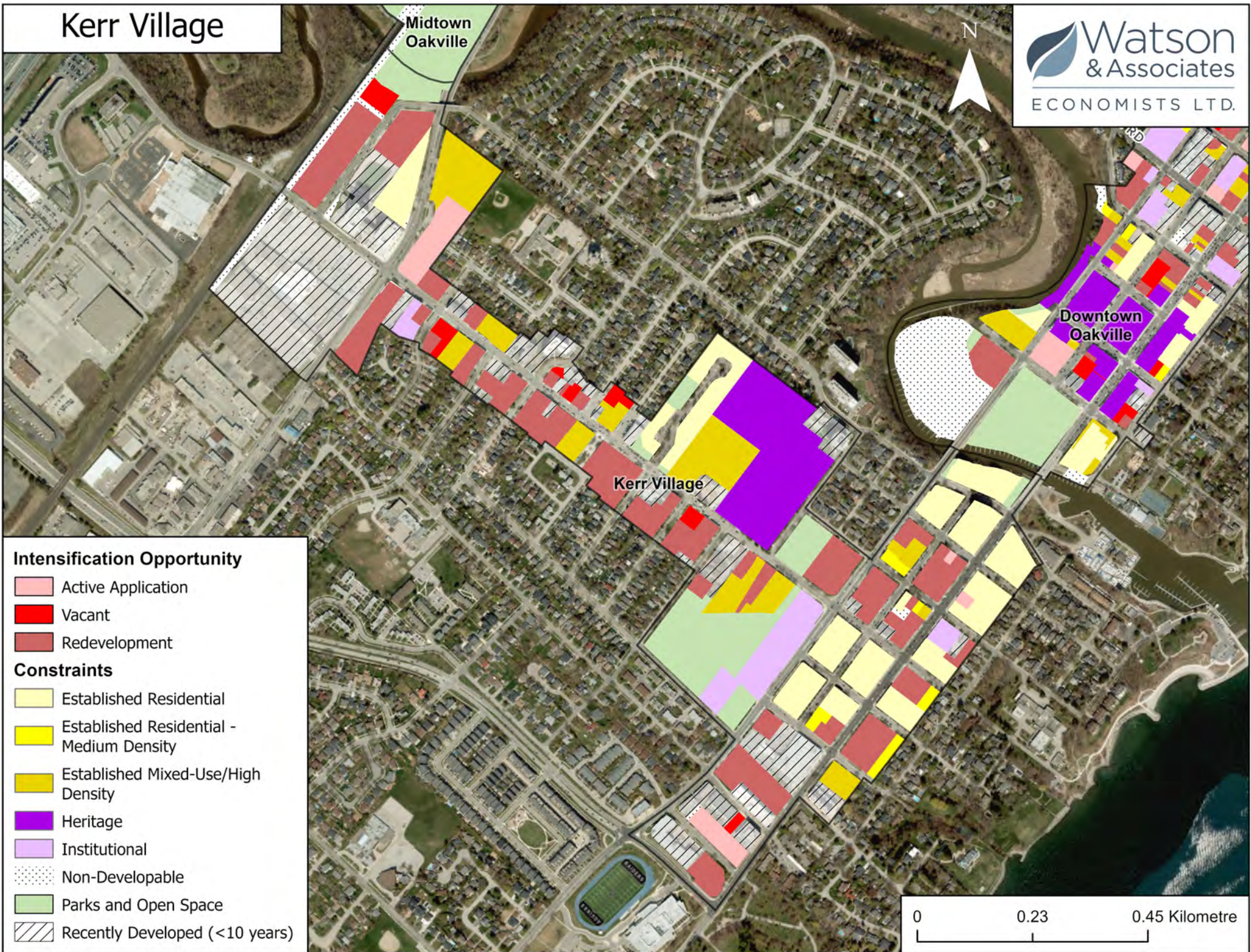
Constraints

-  Established Mixed-Use/High Density
-  Institutional
-  Non-Developable
-  Recently Developed (<10 years)



Kerr Village

Midtown
Oakville











Downtown
Oakville

Kerr Village

Intensification Opportunity

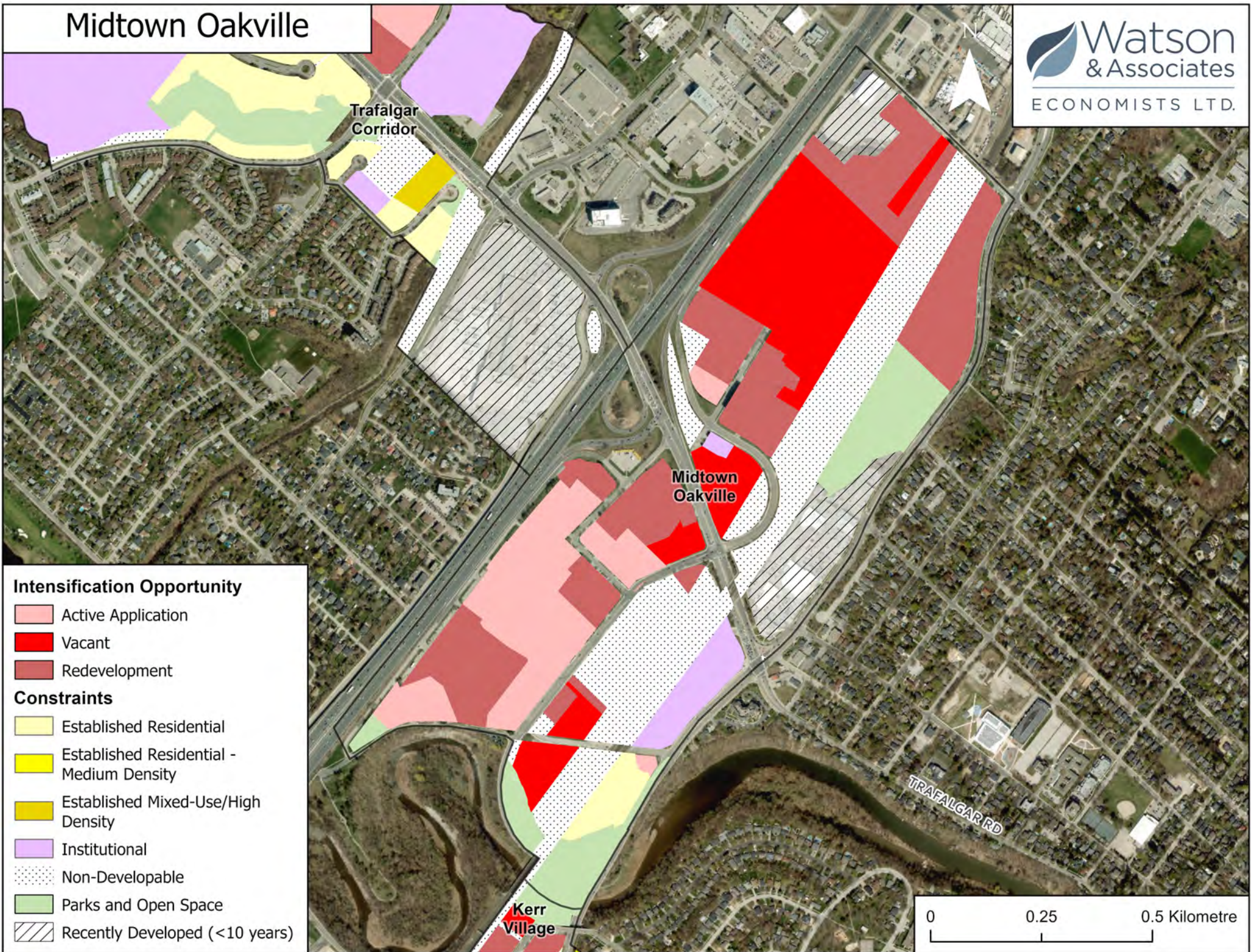
-  Active Application
-  Vacant
-  Redevelopment

Constraints

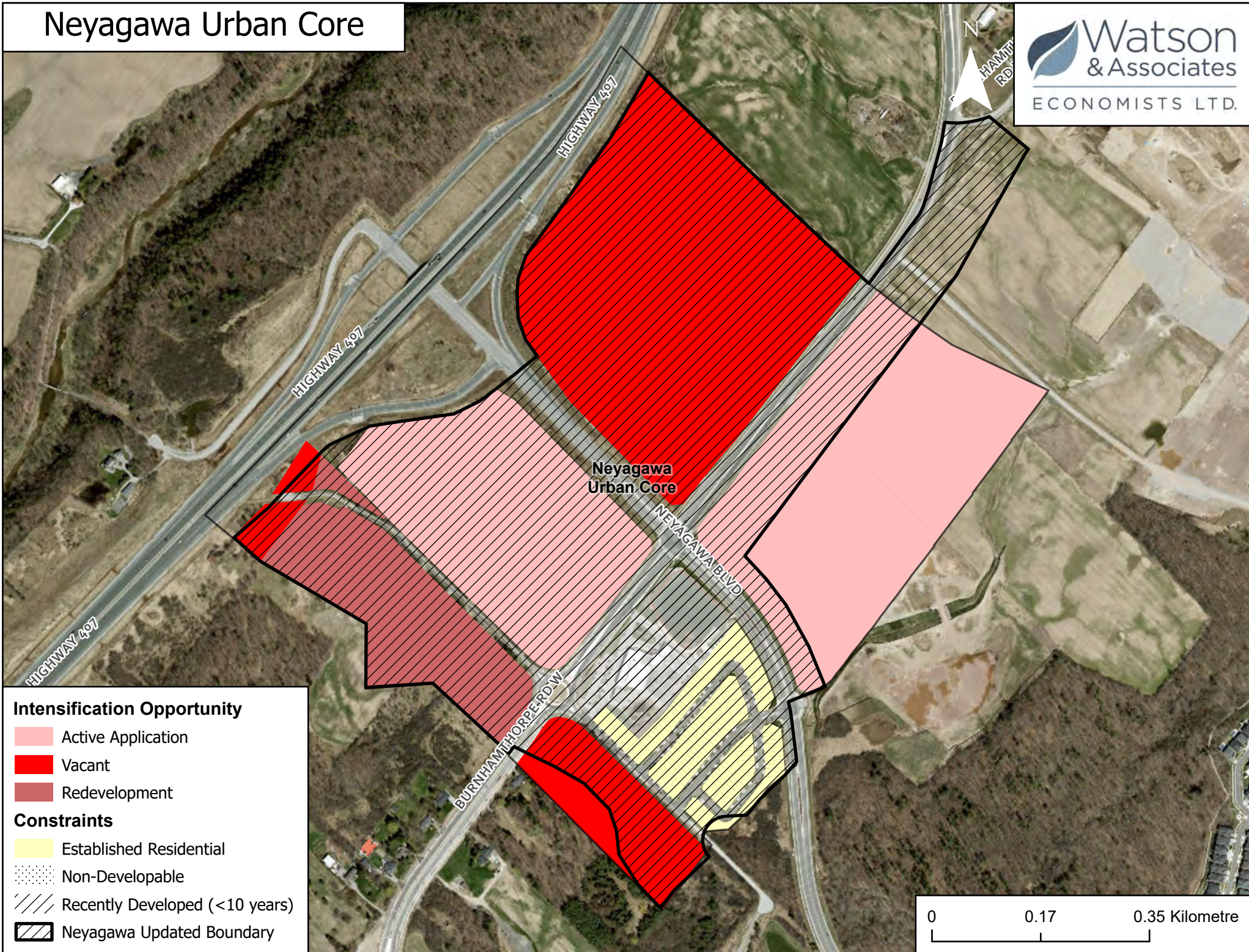
-  Established Residential
-  Established Residential - Medium Density
-  Established Mixed-Use/High Density
-  Heritage
-  Institutional
-  Non-Developable
-  Parks and Open Space
-  Recently Developed (<10 years)



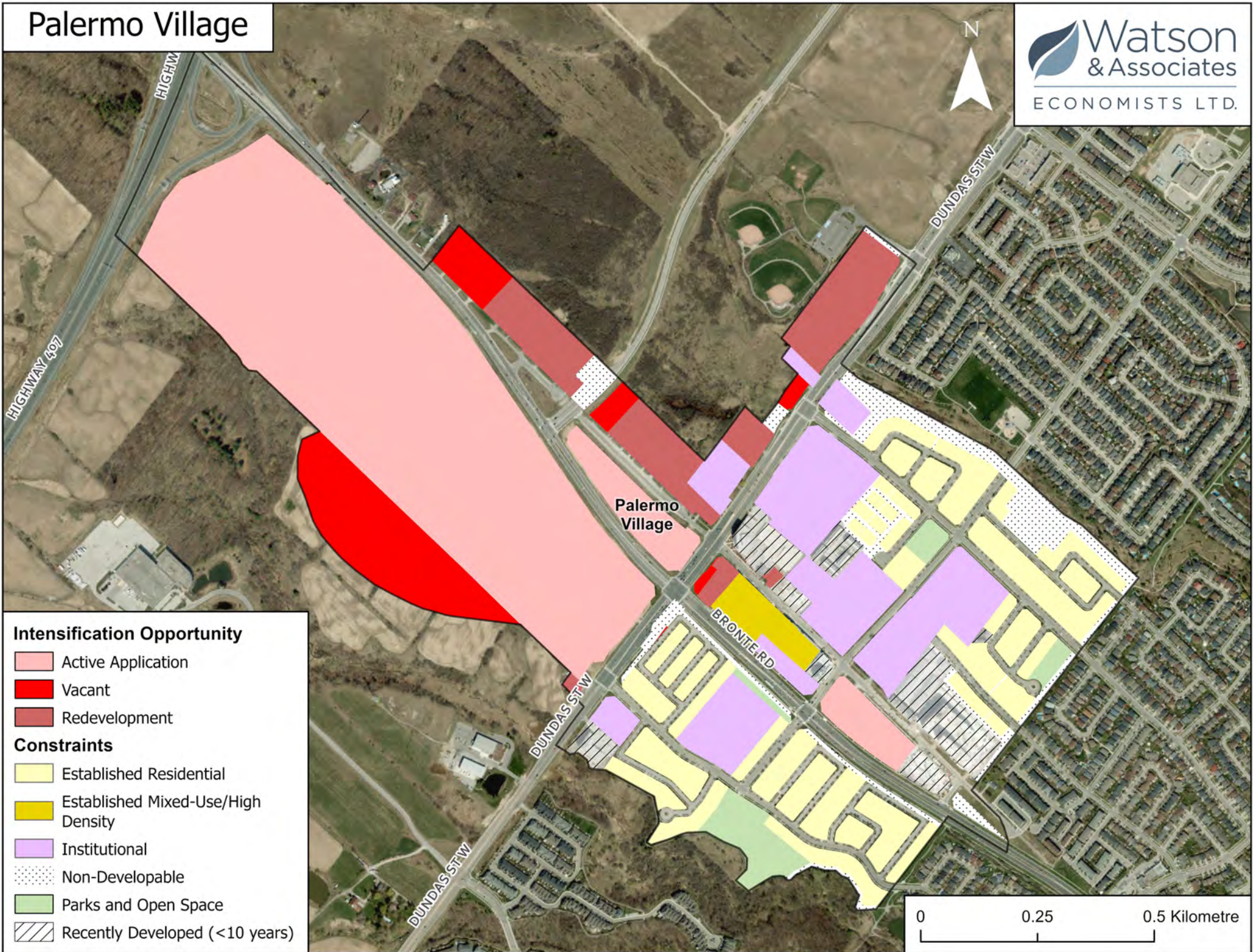
Midtown Oakville



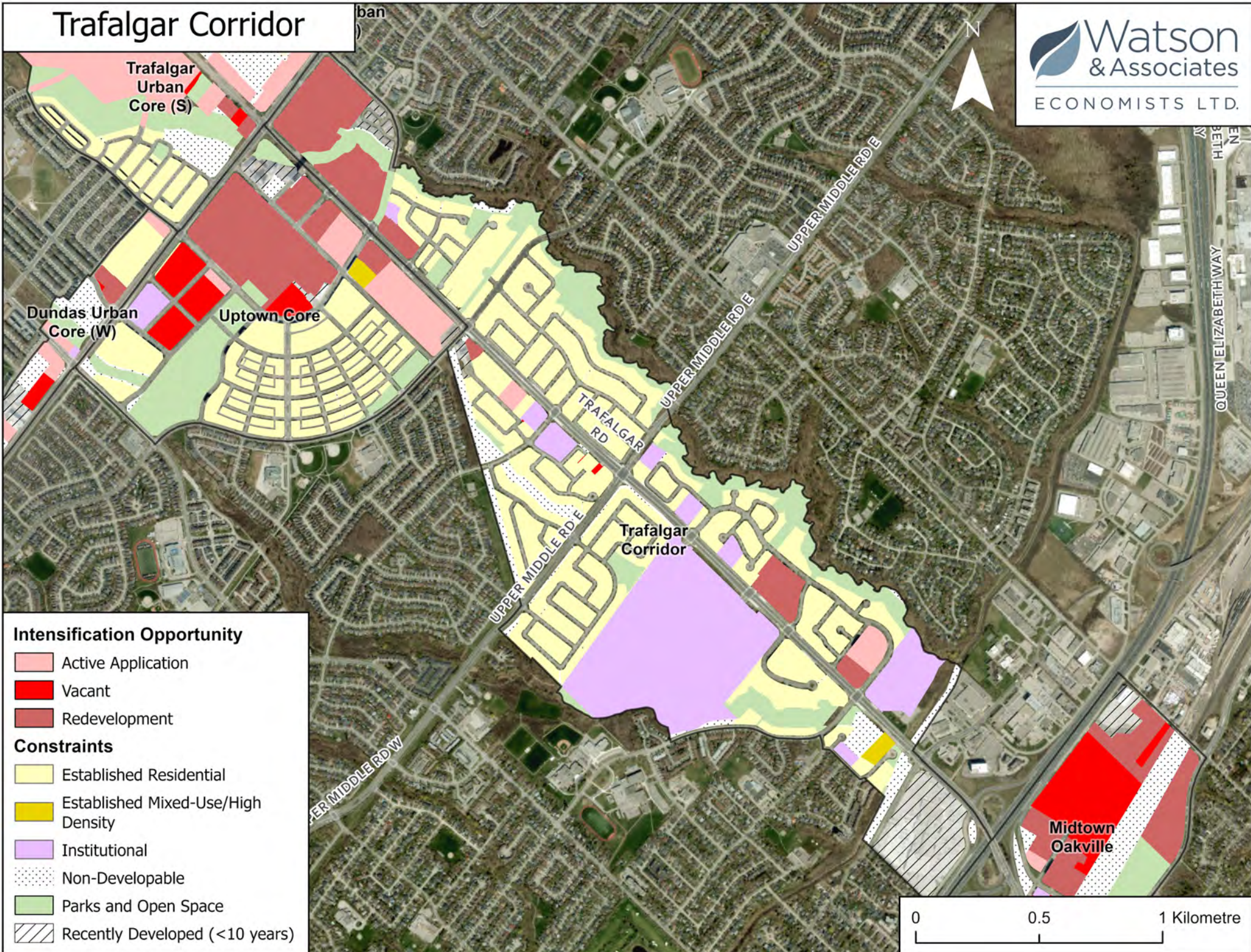
Neyagawa Urban Core



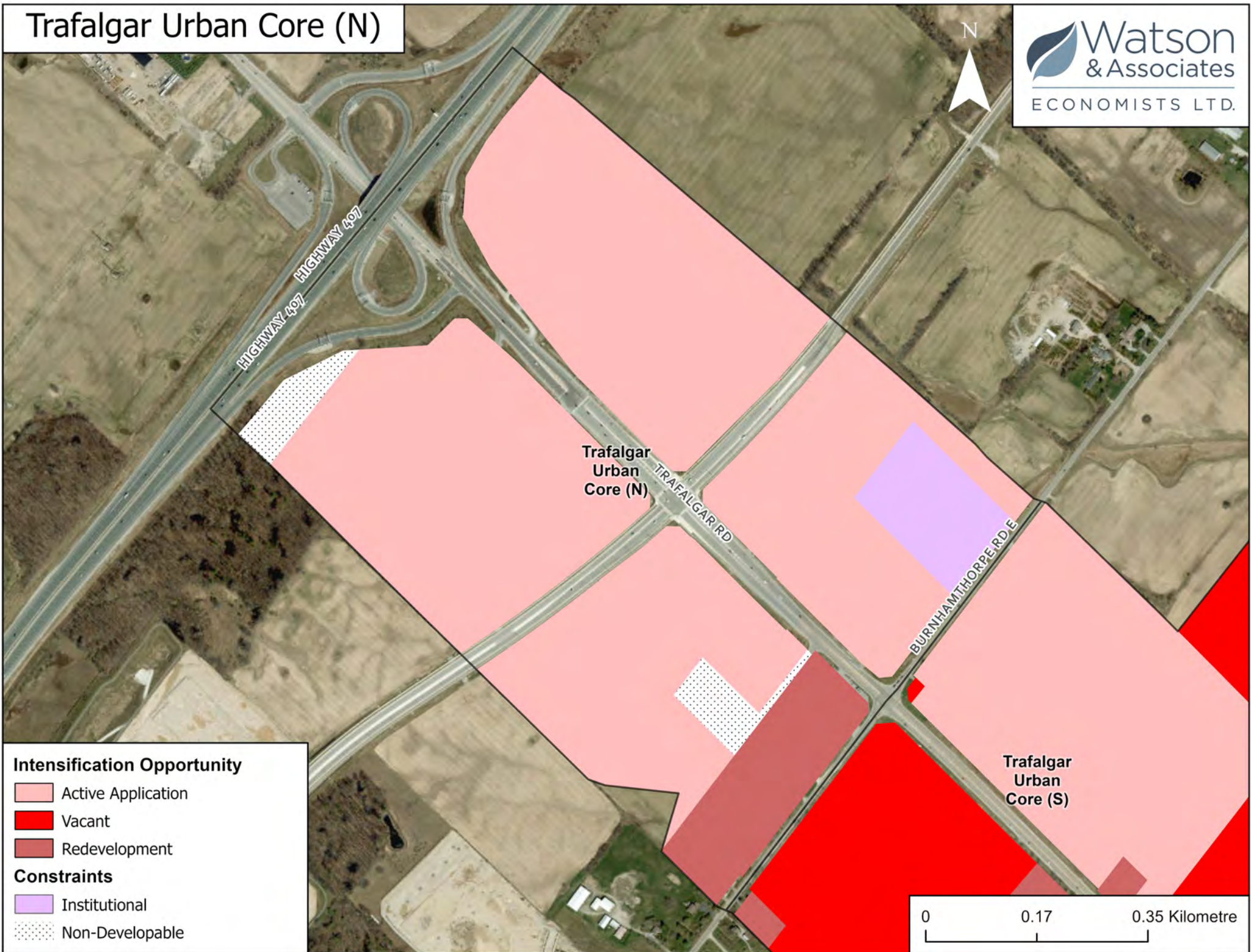
Palermo Village



Trafalgar Corridor



Trafalgar Urban Core (N)

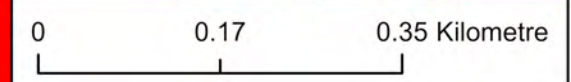


Intensification Opportunity

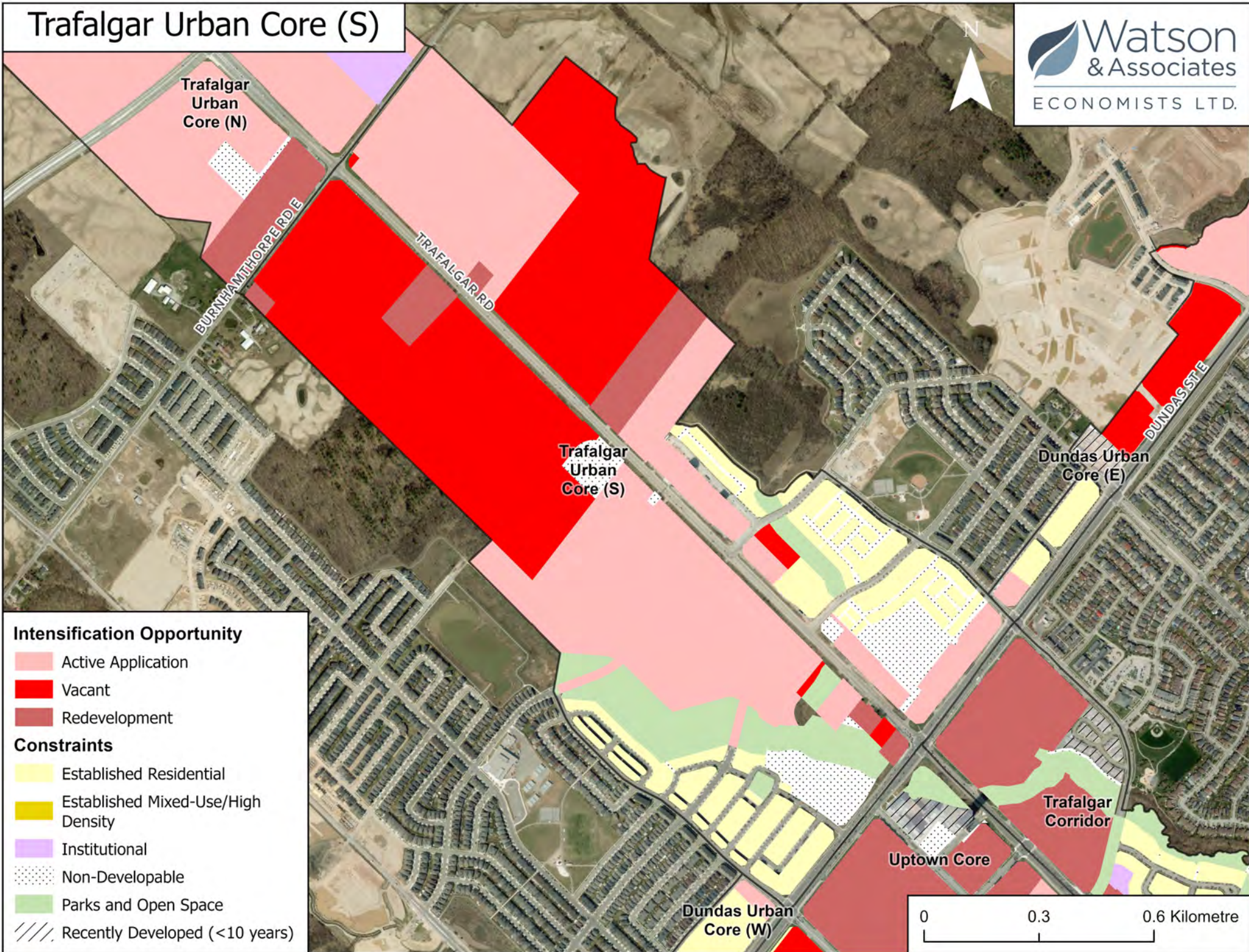
- Active Application
- Vacant
- Redevelopment

Constraints

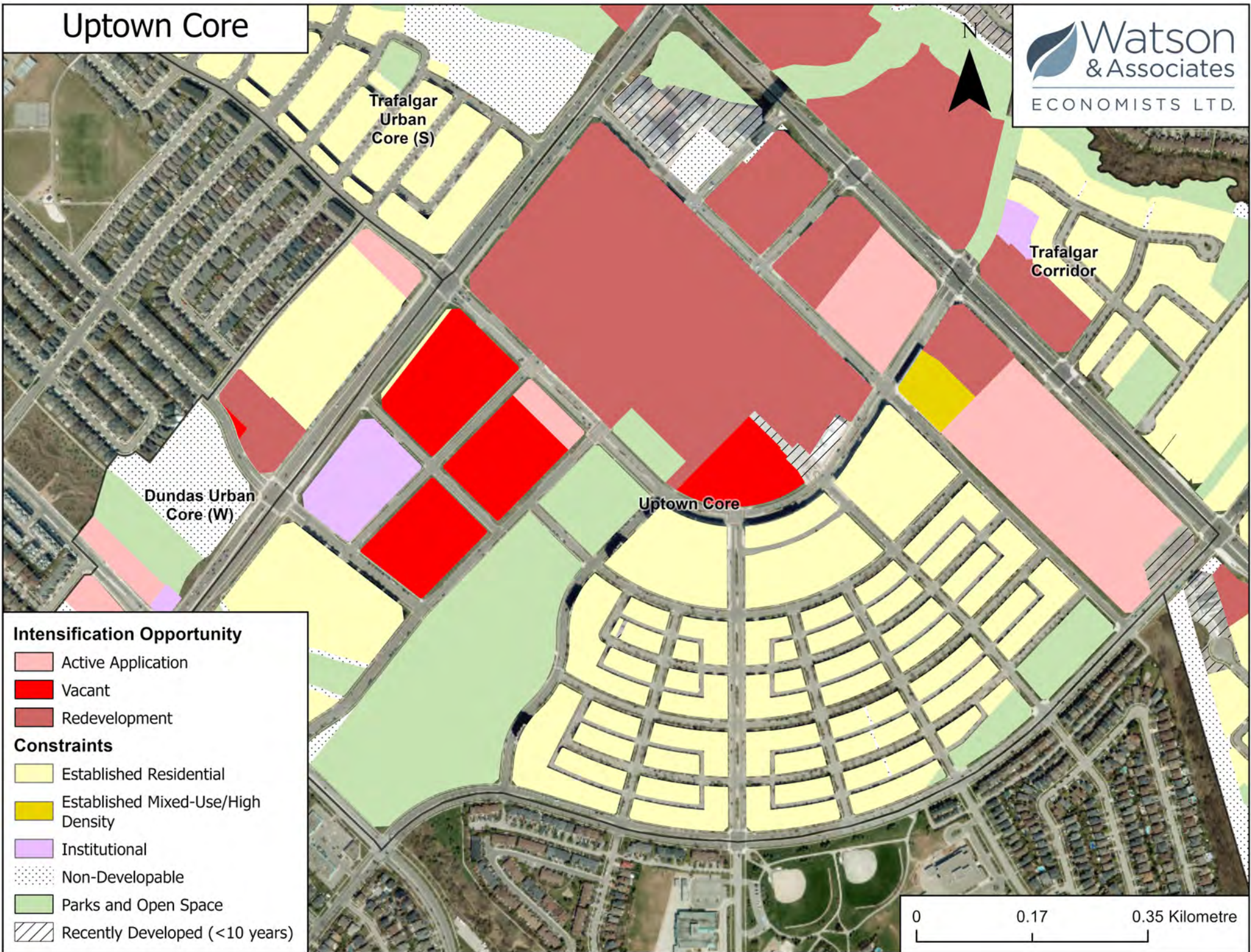
- Institutional
- Non-Developable



Trafalgar Urban Core (S)



Uptown Core



Intensification Opportunity

- Active Application
- Vacant
- Redevelopment

Constraints

- Established Residential
- Established Mixed-Use/High Density
- Institutional
- Non-Developable
- Parks and Open Space
- Recently Developed (<10 years)





Appendix C

Housing Units and Non-Residential Gross Floor Area Yields by Strategic Growth Area



Bronte GO M.T.S.A.

Figure C-1a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-Density Housing Units	Medium-Density Housing Units ^[1]	High-Density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	-	-	0%
Other Intensification Opportunities	0	0	4,771	4,771	100%
Total Intensification Potential	0	0	4,771	4,771	100%
Housing Unit Mix (%)	0%	0%	100%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd.

Other intensification opportunities are based on intensification potential on vacant lands and redevelopment, as analyzed by Watson & Associates Economists Ltd.

Figure C-1b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	-	-	-	50,010	50,010	7%
Other Intensification Opportunities	0	188,038	449,888	10,384	648,310	93%
Total Non-Residential Potential	0	188,038	449,888	60,394	698,320	100%
Non-Residential G.F.A. Mix (%)	0%	27%	64%	9%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd.

Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Bronte Village

Figure C-2a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-Density Housing Units	Medium-Density Housing Units ^[1]	High-Density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	-	-	0%
Other Intensification Opportunities	0	92	390	482	100%
Total Intensification Potential	0	92	390	482	100%
Housing Unit Mix (%)	0%	16%	81%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-2b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	673	0	0	673	7%
Other Intensification Opportunities	0	8,827	0	0	8,827	93%
Total Non-Residential Potential	0	9,500	0	0	9,500	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Downtown Oakville

Figure C-3a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	12	12	2%
Other Intensification Opportunities	0	25	555	580	98%
Total Intensification Potential	0	25	567	592	100%
Housing Unit Mix (%)	0%	4%	96%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-3b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	1,338	0	0	1,338	8%
Other Intensification Opportunities	0	14,626	0	0	14,626	92%
Total Non-Residential Potential	0	15,964	0	0	15,964	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Dundas Urban Core (East)

Figure C-4a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	0	1,338	-	-	0%
Other Intensification Opportunities	0	14,626	2,663	2,663	100%
Total Intensification Potential	0	15,964	2,663	2,663	100%
Housing Unit Mix (%)	0%	100%	100%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-4b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	-	-	-	-	-	0%
Other Intensification Opportunities	0	88,752	0	0	88,752	100%
Total Non-Residential Potential	0	88,752	0	0	88,752	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Dundas Urban Core (West)

Figure C-5a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	399	399	13%
Other Intensification Opportunities	0	0	3,202	3,202	87%
Total Intensification Potential	0	0	3,601	3,601	100%
Housing Unit Mix (%)	0%	0%	100%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-5b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	-	348	-	-	348	0%
Other Intensification Opportunities	0	91,667	0	0	91,667	100%
Total Non-Residential Potential	0	92,015	0	0	92,015	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Hospital District

Figure C-6a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	-	-	0%
Other Intensification Opportunities	0	0	2,700	2,700	100%
Total Intensification Potential	0	0	2,700	2,700	100%
Housing Unit Mix (%)	0%	0%	100%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-6b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	-	-	50,010	-	50,010	14%
Other Intensification Opportunities	314,932	0	0	0	314,932	86%
Total Non-Residential Potential	314,932	0	50,010	0	364,942	100%
Non-Residential G.F.A. Mix (%)	86%	0%	14%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Kerr Village

Figure C-7a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	3	3	0%
Other Intensification Opportunities	96	48	1,023	1,167	100%
Total Intensification Potential	96	48	1,026	1,170	100%
Housing Unit Mix (%)	9%	4%	88%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-7b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	630	0	0	630	2%
Other Intensification Opportunities	828	24,168	0	0	24,997	98%
Total Non-Residential Potential	828	24,798	0	0	25,627	100%
Non-Residential G.F.A. Mix (%)	3%	97%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Midtown Oakville

Figure C-8a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	435	435	2%
Other Intensification Opportunities	0	0	19,225	19,225	98%
Total Intensification Potential	0	0	19,660	19,660	100%
Housing Unit Mix (%)	0%	0%	100%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-8b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	5,905	0	0	5,905	1%
Other Intensification Opportunities	0	119,100	320,056	21,623	757,705	99%
Total Non-Residential Potential	0	125,005	320,056	21,623	763,610	100%
Non-Residential G.F.A. Mix (%)	0%	27%	69%	5%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Neyagawa Urban Core

Figure C-9a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	-	-	0%
Other Intensification Opportunities	0	3,184	0	3,184	100%
Total Intensification Potential	0	3,184	0	3,184	100%
Housing Unit Mix (%)	0%	100%	0%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-9b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	1,786	0	0	1,786	6%
Other Intensification Opportunities	0	28,093	0	0	28,093	94%
Total Non-Residential Potential	0	29,879	0	0	29,879	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Palermo Village

Figure C-10a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	-	-	0%
Other Intensification Opportunities	0	1,754	2,429	4,183	100%
Total Intensification Potential	0	1,754	2,429	4,183	100%
Housing Unit Mix (%)	0%	42%	58%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-10b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	569	0	0	569	1%
Other Intensification Opportunities	0	99,397	0	0	99,397	99%
Total Non-Residential Potential	0	99,966	0	0	99,966	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Trafalgar Corridor

Figure C-11a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	58	-	58	10%
Other Intensification Opportunities	0	0	524	524	90%
Total Intensification Potential	0	58	524	582	100%
Housing Unit Mix (%)	0%	10%	90%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-11b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	0	0	0	-	0%
Other Intensification Opportunities	0	4,527	0	0	4,527	100%
Total Non-Residential Potential	0	4,527	0	0	4,527	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Trafalgar Urban Core (North)

Figure C-12a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	-	-	0%
Other Intensification Opportunities	0	9,998	113	10,112	100%
Total Intensification Potential	0	9,998	113	10,112	100%
Housing Unit Mix (%)	0%	99%	1%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-12b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	-	-	-	-	-	0%
Other Intensification Opportunities	0	94,922	0	0	94,922	100%
Total Non-Residential Potential	0	94,922	0	0	94,922	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Trafalgar Urban Core (South)

Figure C-13a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	349	349	2%
Other Intensification Opportunities	0	1,173	17,986	19,159	98%
Total Intensification Potential	0	1,173	18,335	19,508	100%
Housing Unit Mix (%)	0%	6%	94%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-13b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	-	-	-	-	-	0%
Other Intensification Opportunities	0	149,594	0	0	149,594	100%
Total Non-Residential Potential	0	149,594	0	0	149,594	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Uptown Core

Figure C-14a: Residential Housing Unit Potential within Strategic Growth Area, 2025

Intensification Opportunities	Low-density Housing Units	Medium-density Housing Units ^[1]	High-density Housing Units ^[2]	Total Units	Share of Housing Units
Approved Applications	-	-	-	-	0%
Other Intensification Opportunities	0	0	6,742	6,742	100%
Total Intensification Potential	0	0	6,742	6,742	100%
Housing Unit Mix (%)	0%	0%	100%	100%	-

^[1] Includes back-to-back townhouses and street townhouses.

^[2] Includes stacked townhouses and apartments.

Note: The above figure has been rounded. Due to rounding, figures may differ slightly.

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.

Figure C-14b: Non-Residential Gross Floor Area (G.F.A.) within Strategic Growth Area, 2025

Intensification Opportunities	Retail/Office (sq.m)	Retail (sq.m)	Office (sq.m)	Institutional (sq.m)	Total	Share of G.F.A.
Approved Applications	0	1,670	0	0	1,670	1%
Other Intensification Opportunities	0	220,293	0	0	220,293	99%
Total Non-Residential Potential	0	221,963	0	0	221,963	100%
Non-Residential G.F.A. Mix (%)	0%	100%	0%	0%	100%	-

Source: Approved applications derived from Town of Oakville development applications by Watson & Associates Economists Ltd. Other intensification opportunities based on intensification potential on vacant lands and redevelopment based on an analysis by Watson & Associates Economists Ltd.



Appendix D

Town of Oakville Development Activity by Strategic Growth Area



Appendix D: Town of Oakville Development Activity by Strategic Growth Area

Figure D-1
Town of Oakville
Annual Average Building Permit Activity by Strategic Growth Area, 2011 to 2024

Strategic Growth Area	2011 to 2016 Annual Average	2016 to 2020 Annual Average	2021 to 2024 Annual Average	2011 to 2024 Annual Average
Bronte GO M.T.S.A.	-1	-1	-1	-1
Bronte Village	0	49	3	17
Downtown Oakville	7	1	1	3
Dundas Urban Core (E)	0	19	120	46
Dundas Urban Core (W)	0	122	246	122
Hospital District	0	0	0	0
Kerr Village	91	50	45	62
Midtown Oakville	0	0	0	0
Neyagawa Urban Core	0	26	0	9
Palermo Village	111	104	272	162
Trafalgar Corridor	31	51	48	43
Trafalgar Urban Core (N)	0	0	0	0
Trafalgar Urban Core (S)	37	212	558	269
Uptown Core	196	103	150	150

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

Source: Historical building permit data provided by the Town of Oakville summarized by Watson & Associates Economists Ltd.



Figure D-2
Town of Oakville
Annual Average Housing Growth by Strategic Growth Area, 2021 to 2051

Strategic Growth Area	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Residential Units
Bronte GO M.T.S.A.	0	0	73	73
Bronte Village	0	1	12	13
Downtown Oakville	0	0	17	17
Dundas Urban Core (E)	0	0	75	75
Dundas Urban Core (W)	0	0	86	86
Hospital District	0	0	50	50
Kerr Village	3	4	37	45
Midtown Oakville	0	16	281	297
Neyagawa Urban Core	0	58	15	73
Palermo Village	0	58	81	139
Trafalgar Corridor	0	3	23	26
Trafalgar Urban Core (N)	0	102	47	150
Trafalgar Urban Core (S)	0	40	318	358
Uptown Core	0	0	104	104

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

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

Source: Watson & Associates Economists Ltd.



Figure D-3
Town of Oakville
Annual Average J.B.P.E. Housing Growth by Strategic Growth Area, 2021 to 2051

Strategic Growth Area	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Residential Units
Bronte GO M.T.S.A.	0	0	77	77
Bronte Village	0	1	49	49
Downtown Oakville	0	4	26	30
Dundas Urban Core (E)	0	11	41	52
Dundas Urban Core (W)	0	20	75	95
Hospital District	0	0	69	69
Kerr Village	2	1	102	106
Midtown Oakville	0	20	514	534
Neyagawa Urban Core	2	66	67	135
Palermo Village	12	70	125	207
Trafalgar Corridor	2	18	120	140
Trafalgar Urban Core (N)	1	12	276	289
Trafalgar Urban Core (S)	6	40	640	686
Uptown Core	0	11	118	129

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

Note: Figures have been rounded and may not add precisely. J.B.P.E. refers to the Joint Best Planning Estimates. M.T.S.A. means major transit station area.

Source: Derived from Halton Region's Joint Best Planning Estimates for the Town of Oakville, summarized by Watson & Associates Economists Ltd.



Appendix E

Town of Oakville Population and Housing Allocation



Appendix E: Town of Oakville Population and Housing Allocation

Figure E-1
Town of Oakville
Incremental Population and Housing Growth by Area

Development Location	Timing	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Residential Units	Net Population
Bronte GO M.T.S.A.	2021 to 2026	0	0	0	0	0
	2021 to 2031	0	0	270	270	500
	2021 to 2036	0	0	410	410	800
	2021 to 2041	0	0	870	870	1,600
	2021 to 2046	0	0	1,440	1,440	2,700
	2021 to 2051	0	0	2,200	2,200	4,100
Bronte Village	2021 to 2026	0	10	0	10	100
	2021 to 2031	0	20	140	160	400
	2021 to 2036	0	20	190	210	500
	2021 to 2041	0	30	230	260	600
	2021 to 2046	0	30	280	310	700
	2021 to 2051	0	40	360	400	800
Downtown Oakville	2021 to 2026	0	0	0	0	0
	2021 to 2031	0	0	60	60	200
	2021 to 2036	0	0	140	140	300
	2021 to 2041	0	0	240	240	500
	2021 to 2046	0	0	370	370	700
	2021 to 2051	0	0	520	520	1,000
Dundas Urban Core (East)	2021 to 2026	0	0	480	480	900
	2021 to 2031	0	0	990	990	1,900
	2021 to 2036	0	0	1,430	1,430	2,700
	2021 to 2041	0	0	1,790	1,790	3,400
	2021 to 2046	0	0	2,020	2,020	3,800
	2021 to 2051	0	0	2,250	2,250	4,200
Dundas Urban Core (West)	2021 to 2026	0	0	990	990	1,900
	2021 to 2031	0	0	1,200	1,200	2,300
	2021 to 2036	0	0	1,490	1,490	2,800
	2021 to 2041	0	0	1,810	1,810	3,400
	2021 to 2046	0	0	2,200	2,200	4,100
	2021 to 2051	0	0	2,590	2,590	4,900
Hospital District	2021 to 2026	0	0	0	0	0
	2021 to 2031	0	0	140	140	300
	2021 to 2036	0	0	370	370	700
	2021 to 2041	0	0	710	710	1,300
	2021 to 2046	0	0	1,100	1,100	2,100
	2021 to 2051	0	0	1,490	1,490	2,800
Kerr Village	2021 to 2026	20	80	80	180	600
	2021 to 2031	40	90	250	380	1,000
	2021 to 2036	60	100	450	610	1,500
	2021 to 2041	70	110	670	850	2,100
	2021 to 2046	80	120	900	1,100	2,600
	2021 to 2051	100	130	1,120	1,350	2,900
Midtown Oakville	2021 to 2026	0	0	0	0	0
	2021 to 2031	0	0	630	630	1,200
	2021 to 2036	0	110	2,580	2,690	5,100
	2021 to 2041	0	230	4,550	4,780	9,200
	2021 to 2046	0	360	6,530	6,890	13,200
	2021 to 2051	0	480	8,430	8,910	17,100

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

Notes: Figures have been rounded. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd.



Figure E-1 (Continued)
Town of Oakville
Incremental Population and Housing Growth by Area

Development Location	Timing	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Residential Units	Net Population
Neyagawa Urban Core	2021 to 2026	0	0	0	0	0
	2021 to 2031	0	410	60	470	1,300
	2021 to 2036	0	830	170	1,000	2,700
	2021 to 2041	0	1,180	260	1,440	3,900
	2021 to 2046	0	1,480	350	1,830	4,900
	2021 to 2051	0	1,740	440	2,180	5,800
Palermo Village	2021 to 2026	0	0	1,090	1,090	2,200
	2021 to 2031	0	160	990	1,150	2,400
	2021 to 2036	0	510	1,530	2,040	4,400
	2021 to 2041	0	850	2,050	2,900	6,400
	2021 to 2046	0	1,240	2,310	3,550	8,000
	2021 to 2051	0	1,750	2,430	4,180	9,700
Trafalgar Corridor	2021 to 2026	0	30	170	200	600
	2021 to 2031	0	90	290	380	1,000
	2021 to 2036	0	90	450	540	1,300
	2021 to 2041	0	90	570	660	1,600
	2021 to 2046	0	90	600	690	1,700
	2021 to 2051	0	90	680	770	1,700
Trafalgar Urban Core (North)	2021 to 2026	0	0	0	0	0
	2021 to 2031	0	970	230	1,200	3,200
	2021 to 2036	0	1,830	350	2,180	5,900
	2021 to 2041	0	2,460	500	2,960	8,000
	2021 to 2046	0	2,910	880	3,790	10,000
	2021 to 2051	0	3,070	1,420	4,490	11,500
Trafalgar Urban Core (South)	2021 to 2026	0	270	1,970	2,240	4,600
	2021 to 2031	0	560	4,130	4,690	9,400
	2021 to 2036	0	740	5,190	5,930	12,000
	2021 to 2041	0	940	6,420	7,360	15,000
	2021 to 2046	0	1,070	8,050	9,120	18,800
	2021 to 2051	0	1,190	9,550	10,740	21,300
Uptown Core	2021 to 2026	0	0	600	600	1,300
	2021 to 2031	0	0	1,230	1,230	2,500
	2021 to 2036	0	0	1,790	1,790	3,500
	2021 to 2041	0	0	2,260	2,260	4,500
	2021 to 2046	0	0	2,720	2,720	5,300
	2021 to 2051	0	0	3,130	3,130	6,000
Strategic Growth Areas	2021 to 2026	20	390	5,380	5,790	12,200
	2021 to 2031	40	2,300	10,610	12,950	27,600
	2021 to 2036	60	4,230	16,540	20,830	44,200
	2021 to 2041	70	5,890	22,930	28,890	61,500
	2021 to 2046	80	7,300	29,750	37,130	78,600
	2021 to 2051	100	8,490	36,610	45,200	93,800

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Figure E-1 (Continued)
Town of Oakville
Incremental Population and Housing Growth by Area

Development Location	Timing	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Residential Units	Net Population
Oakville Central	2021 to 2026	0	0	10	10	600
	2021 to 2031	10	20	420	450	1,500
	2021 to 2036	10	30	640	680	2,000
	2021 to 2041	10	40	800	850	2,400
	2021 to 2046	10	50	890	950	2,500
	2021 to 2051	10	60	980	1,050	2,500
Oakville East	2021 to 2026	100	0	0	100	800
	2021 to 2031	20	40	200	260	1,000
	2021 to 2036	20	70	310	400	1,400
	2021 to 2041	20	90	390	500	1,700
	2021 to 2046	20	110	470	600	1,900
	2021 to 2051	20	130	500	650	1,800
Oakville North Central	2021 to 2026	670	670	900	2,240	6,200
	2021 to 2031	1,460	1,110	1,440	4,010	11,400
	2021 to 2036	1,990	1,390	1,820	5,200	14,800
	2021 to 2041	2,920	1,750	2,080	6,750	19,700
	2021 to 2046	3,810	2,050	2,240	8,100	24,100
	2021 to 2051	4,550	2,340	2,560	9,450	28,000
Oakville North East	2021 to 2026	400	400	1,000	1,800	4,600
	2021 to 2031	1,200	700	1,400	3,300	9,000
	2021 to 2036	2,000	900	2,000	4,900	13,500
	2021 to 2041	2,200	1,000	2,200	5,400	14,900
	2021 to 2046	2,300	1,100	2,300	5,700	15,600
	2021 to 2051	2,300	1,100	2,300	5,700	16,000
Oakville North West	2021 to 2026	0	0	0	0	0
	2021 to 2031	0	0	0	0	0
	2021 to 2036	0	0	0	0	0
	2021 to 2041	0	0	0	0	0
	2021 to 2046	0	0	0	0	0
	2021 to 2051	0	0	0	0	0
Oakville South East	2021 to 2026	30	90	0	120	800
	2021 to 2031	80	100	270	450	1,600
	2021 to 2036	120	180	470	770	2,400
	2021 to 2041	160	250	630	1,040	3,100
	2021 to 2046	180	300	760	1,240	3,600
	2021 to 2051	210	350	850	1,410	3,800
Oakville South West	2021 to 2026	70	10	0	80	1,100
	2021 to 2031	50	130	310	490	2,000
	2021 to 2036	110	240	490	840	2,900
	2021 to 2041	160	330	620	1,110	3,800
	2021 to 2046	190	400	710	1,300	4,000
	2021 to 2051	230	450	770	1,450	4,200
Oakville West	2021 to 2026	440	210	370	1,020	4,000
	2021 to 2031	710	340	620	1,670	5,800
	2021 to 2036	890	460	870	2,220	7,400
	2021 to 2041	970	550	1,100	2,620	8,700
	2021 to 2046	1,060	570	1,260	2,890	9,400
	2021 to 2051	1,100	600	1,440	3,140	9,300
Residential Areas	2021 to 2026	1,710	1,380	2,280	5,370	18,100
	2021 to 2031	3,530	2,440	4,660	10,630	32,300
	2021 to 2036	5,140	3,270	6,600	15,010	44,400
	2021 to 2041	6,440	4,010	7,820	18,270	54,300
	2021 to 2046	7,570	4,580	8,630	20,780	61,100
	2021 to 2051	8,420	5,030	9,400	22,850	65,600

^[1] Includes single and semi-detached dwellings.

^[2] Includes row and back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, as well as secondary suites (i.e., self-contained living accommodations, such as apartments and small residential units, located on a property with a separate main residential unit).

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Appendix F

Town of Oakville Employment Allocation



Appendix F: Town of Oakville Employment Allocation

Figure F-1
Town of Oakville
Incremental Employment Growth by Land Use Category and by Development Location

Development Location	Timing	Major Office Employment	Population-Related Employment	Employment Land Employment ^[1]	Rural Employment	Total Employment ^[2]
Bronte GO M.T.S.A.	2024 to 2026	230	20	0	0	250
	2024 to 2031	720	70	0	0	790
	2024 to 2036	760	130	0	0	890
	2024 to 2041	850	200	0	0	1,050
	2024 to 2046	1,020	290	0	0	1,310
	2024 to 2051	1,160	460	0	0	1,620
Bronte Village	2024 to 2026	0	20	0	0	20
	2024 to 2031	0	340	0	0	340
	2024 to 2036	0	610	0	0	610
	2024 to 2041	0	850	0	0	850
	2024 to 2046	0	1,070	0	0	1,070
	2024 to 2051	0	1,230	0	0	1,230
Downtown Oakville	2024 to 2026	0	10	0	0	10
	2024 to 2031	0	110	0	0	110
	2024 to 2036	0	190	0	0	190
	2024 to 2041	0	260	0	0	260
	2024 to 2046	0	330	0	0	330
	2024 to 2051	0	400	0	0	400
Dundas Urban Core (East)	2024 to 2026	0	210	0	0	210
	2024 to 2031	0	790	0	0	790
	2024 to 2036	0	1,060	0	0	1,060
	2024 to 2041	0	1,250	0	0	1,250
	2024 to 2046	0	1,360	0	0	1,360
	2024 to 2051	0	1,440	0	0	1,440
Dundas Urban Core (West)	2024 to 2026	0	300	0	0	300
	2024 to 2031	0	770	0	0	770
	2024 to 2036	0	990	0	0	990
	2024 to 2041	0	1,210	0	0	1,210
	2024 to 2046	0	1,480	0	0	1,480
	2024 to 2051	0	1,750	0	0	1,750
Hospital District	2024 to 2026	0	100	0	0	100
	2024 to 2031	0	390	0	0	390
	2024 to 2036	0	800	0	0	800
	2024 to 2041	0	1,110	0	0	1,110
	2024 to 2046	0	1,400	0	0	1,400
	2024 to 2051	0	1,590	0	0	1,590
Kerr Village	2024 to 2026	0	70	0	0	70
	2024 to 2031	0	200	0	0	200
	2024 to 2036	0	320	0	0	320
	2024 to 2041	0	450	0	0	450
	2024 to 2046	0	530	0	0	530
	2024 to 2051	0	590	0	0	590
Midtown Oakville	2024 to 2026	0	0	0	0	0
	2024 to 2031	0	310	0	0	310
	2024 to 2036	490	1,400	0	0	1,890
	2024 to 2041	680	2,590	0	0	3,270
	2024 to 2046	850	3,800	0	0	4,650
	2024 to 2051	1,000	4,960	0	0	5,960

^[1] Includes jobs in Employment Areas and Employment-Generating Lands.

^[2] Includes work at home and no fixed place of work.

Notes: Figures have been rounded. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd.



Figure F-1 (Continued)
Town of Oakville
Incremental Employment Growth by Land Use Category and by Development Location

Development Location	Timing	Major Office Employment	Population-Related Employment	Employment Land Employment ^[1]	Rural Employment	Total Employment ^[2]
Neyagawa Urban Core	2024 to 2026	0	0	0	0	0
	2024 to 2031	0	240	0	0	240
	2024 to 2036	0	600	0	0	600
	2024 to 2041	0	1,130	0	0	1,130
	2024 to 2046	0	1,450	0	0	1,450
	2024 to 2051	0	1,750	0	0	1,750
Palermo Village	2024 to 2026	0	310	0	0	310
	2024 to 2031	700	860	0	0	1,560
	2024 to 2036	770	1,140	0	0	1,910
	2024 to 2041	860	1,530	0	0	2,390
	2024 to 2046	970	1,910	0	0	2,880
	2024 to 2051	1,110	2,230	0	0	3,340
Trafalgar Corridor	2024 to 2026	250	470	0	0	720
	2024 to 2031	270	1,150	0	0	1,420
	2024 to 2036	370	1,450	0	0	1,820
	2024 to 2041	390	1,680	0	0	2,070
	2024 to 2046	430	1,800	0	0	2,230
	2024 to 2051	440	1,830	0	0	2,270
Trafalgar Urban Core (North)	2024 to 2026	0	0	0	0	0
	2024 to 2031	0	0	0	0	0
	2024 to 2036	350	430	0	0	780
	2024 to 2041	660	830	0	0	1,490
	2024 to 2046	930	1,220	0	0	2,150
	2024 to 2051	1,160	1,440	0	0	2,600
Trafalgar Urban Core (South)	2024 to 2026	0	140	0	0	140
	2024 to 2031	0	760	0	0	760
	2024 to 2036	120	1,310	0	0	1,430
	2024 to 2041	560	1,650	0	0	2,210
	2024 to 2046	750	2,020	0	0	2,770
	2024 to 2051	950	2,040	0	0	2,990
Uptown Core	2024 to 2026	30	20	0	0	50
	2024 to 2031	110	180	0	0	290
	2024 to 2036	220	330	0	0	550
	2024 to 2041	300	520	0	0	820
	2024 to 2046	430	740	0	0	1,170
	2024 to 2051	510	1,020	0	0	1,530
Strategic Growth Areas	2024 to 2026	500	1,650	0	0	2,150
	2024 to 2031	1,800	6,160	0	0	7,960
	2024 to 2036	3,070	10,760	0	0	13,830
	2024 to 2041	4,290	15,270	0	0	19,560
	2024 to 2046	5,390	19,390	0	0	24,780
	2024 to 2051	6,320	22,740	0	0	29,060

^[1] Includes jobs in Employment Areas and Employment-Generating Lands.

^[2] Includes work at home and no fixed place of work.

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Figure F-1 (Continued)
Town of Oakville
Incremental Employment Growth by Land Use Category and by Development Location

Development Location	Timing	Major Office Employment	Population-Related Employment	Employment Land Employment ^[1]	Rural Employment	Total Employment ^[2]
Oakville Central	2024 to 2026	0	20	0	0	20
	2024 to 2031	0	110	0	0	110
	2024 to 2036	0	200	0	0	200
	2024 to 2041	0	290	0	0	290
	2024 to 2046	0	350	0	0	350
	2024 to 2051	0	420	0	0	420
Oakville East	2024 to 2026	0	30	0	0	30
	2024 to 2031	0	80	0	0	80
	2024 to 2036	0	140	0	0	140
	2024 to 2041	0	210	0	0	210
	2024 to 2046	0	280	0	0	280
	2024 to 2051	0	290	0	0	290
Oakville North Central	2024 to 2026	0	220	0	0	220
	2024 to 2031	0	880	0	0	880
	2024 to 2036	0	1,470	0	0	1,470
	2024 to 2041	0	2,350	0	0	2,350
	2024 to 2046	0	2,930	0	0	2,930
	2024 to 2051	0	4,620	0	0	4,620
Oakville North East	2024 to 2026	0	160	0	0	160
	2024 to 2031	0	690	0	0	690
	2024 to 2036	0	1,340	0	0	1,340
	2024 to 2041	0	1,780	0	0	1,780
	2024 to 2046	0	2,190	0	0	2,190
	2024 to 2051	0	2,630	0	0	2,630
Oakville North West	2024 to 2026	0	0	0	0	0
	2024 to 2031	0	0	0	0	0
	2024 to 2036	0	0	0	0	0
	2024 to 2041	0	0	0	0	0
	2024 to 2046	0	0	0	0	0
	2024 to 2051	0	0	0	0	0
Oakville South East	2024 to 2026	0	30	0	0	30
	2024 to 2031	0	120	0	0	120
	2024 to 2036	0	240	0	0	240
	2024 to 2041	0	370	0	0	370
	2024 to 2046	0	510	0	0	510
	2024 to 2051	0	620	0	0	620
Oakville South West	2024 to 2026	0	40	0	0	40
	2024 to 2031	0	150	0	0	150
	2024 to 2036	0	290	0	0	290
	2024 to 2041	0	450	0	0	450
	2024 to 2046	0	600	0	0	600
	2024 to 2051	0	720	0	0	720
Oakville West	2024 to 2026	0	140	0	0	140
	2024 to 2031	0	450	0	0	450
	2024 to 2036	0	740	0	0	740
	2024 to 2041	0	1,040	0	0	1,040
	2024 to 2046	0	1,330	0	0	1,330
	2024 to 2051	0	1,540	0	0	1,540
Residential Areas	2024 to 2026	0	620	0	0	620
	2024 to 2031	0	2,490	0	0	2,490
	2024 to 2036	0	4,420	0	0	4,420
	2024 to 2041	0	6,480	0	0	6,480
	2024 to 2046	0	8,610	0	0	8,610
	2024 to 2051	0	10,810	0	0	10,810

^[1] Includes jobs in Employment Areas and Employment-Generating Lands.

^[2] Includes work at home and no fixed place of work.

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Figure F-1 (Continued)
Town of Oakville
Incremental Employment Growth by Land Use Category and by Development Location

Development Location	Timing	Major Office Employment	Population-Related Employment	Employment Land Employment ^[1]	Rural Employment	Total Employment ^[2]
Commercial Areas	2024 to 2026	0	160	0	0	160
	2024 to 2031	0	450	0	0	450
	2024 to 2036	0	730	0	0	730
	2024 to 2041	0	950	0	0	950
	2024 to 2046	0	1,090	0	0	1,090
	2024 to 2051	0	1,200	0	0	1,200
Employment Lands	2024 to 2026	790	690	1,270	0	2,750
	2024 to 2031	2,820	2,200	5,500	0	10,520
	2024 to 2036	4,800	3,370	9,160	0	17,330
	2024 to 2041	6,710	4,320	12,520	0	23,550
	2024 to 2046	8,420	4,930	15,320	0	28,670
	2024 to 2051	9,880	5,290	17,470	0	32,640
Town of Oakville	2024 to 2026	1,290	3,120	1,270	0	5,680
	2024 to 2031	4,630	11,300	5,500	0	21,430
	2024 to 2036	7,870	19,280	9,160	0	36,310
	2024 to 2041	11,000	27,020	12,520	0	50,540
	2024 to 2046	13,810	34,010	15,320	0	63,140
	2024 to 2051	16,200	40,030	17,470	0	73,700

^[1] Includes jobs in Employment Areas and Employment-Generating Lands.

^[2] Includes work at home and no fixed place of work.

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Appendix G

Town of Oakville Population, Housing, and Employment Comparison to Joint Best Planning Estimates



Appendix G: Town of Oakville Population, Housing, and Employment Comparison to Joint Best Planning Estimates

Figure G-1
Town of Oakville
Total Population, 2021 to 2051

Policy Area	Development Area	2021 Population ^[1]	2051 Population ^[1]	2021 to 2051 Population Growth	Annual Population Growth	Annual Growth Rate	Share of Growth
Strategic Growth Areas	Bronte GO M.T.S.A.	0	4,300	4,300	143		2.6%
	Bronte Village	2,400	3,300	900	30	1.1%	0.5%
	Downtown Oakville	800	1,900	1,100	37	2.9%	0.7%
	Dundas Urban Core (E)	300	4,700	4,400	147	9.6%	2.7%
	Dundas Urban Core (W)	500	5,600	5,100	170	8.4%	3.1%
	Hospital District	0	2,900	2,900	97		1.8%
	Kerr Village	5,400	8,400	3,000	100	1.5%	1.8%
	Midtown Oakville	500	18,300	17,800	593	12.7%	10.7%
	Neyagawa Urban Core	500	6,500	6,000	200	8.9%	3.6%
	Palermo Village	4,500	14,500	10,000	333	4.0%	6.0%
	Trafalgar Corridor	8,800	10,600	1,800	60	0.6%	1.1%
	Trafalgar Urban Core (N)	0	11,900	11,900	397		7.2%
	Trafalgar Urban Core (S)	3,200	25,400	22,200	740	7.1%	13.4%
	Uptown Core	6,300	12,500	6,200	207	2.3%	3.7%
Residential Areas	Oakville Central	25,500	28,200	2,700	90	0.3%	1.6%
	Oakville East	26,100	27,900	1,800	60	0.2%	1.1%
	Oakville North Central	15,200	44,300	29,100	970	3.6%	17.6%
	Oakville North East	2,100	18,700	16,600	553	7.6%	10.0%
	Oakville North West	0	0	0	0		0.0%
	Oakville South East	23,500	27,400	3,900	130	0.5%	2.4%
	Oakville South West	37,700	42,100	4,400	147	0.4%	2.7%
	Oakville West	58,700	68,400	9,700	323	0.5%	5.9%
Strategic Growth Areas		33,200	130,800	97,600	3,253	4.7%	58.9%
Residential Areas		188,800	257,000	68,200	2,273	1.0%	41.2%
Town of Oakville		222,100	387,800	165,700	5,523	1.9%	100.0%

^[1] Includes population net Census undercount.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd.



Figure G-2
Town of Oakville
Joint Best Planning Estimates Total Population, 2021 to 2051

Policy Area	Development Area	2021 Population ^[1]	2051 Population ^[1]	2021 to 2051 Population Growth	Annual Population Growth	Annual Growth Rate	Share of Growth
Strategic Growth Areas	Bronte GO M.T.S.A.	0	4,560	4,560	152		2.0%
	Bronte Village	2,160	5,050	2,890	96	2.9%	1.3%
	Downtown Oakville	1,090	2,970	1,880	63	3.4%	0.8%
	Dundas Urban Core (E)	0	3,350	3,350	112		1.5%
	Dundas Urban Core (W)	1,010	7,110	6,100	203	6.7%	2.7%
	Hospital District	0	4,060	4,060	135		1.8%
	Kerr Village	4,650	10,890	6,250	208	2.9%	2.8%
	Midtown Oakville	640	32,470	31,830	1,061	14.0%	14.3%
	Neyagawa Urban Core	530	10,500	9,970	332	10.5%	4.5%
	Palermo Village	4,670	19,620	14,950	498	4.9%	6.7%
	Trafalgar Corridor	8,970	17,820	8,860	295	2.3%	4.0%
	Trafalgar Urban Core (N)	<10	17,670	17,670	589		7.9%
	Trafalgar Urban Core (S)	3,640	45,090	41,450	1,382	8.7%	18.6%
	Uptown Core	6,570	14,400	7,840	261	2.7%	3.5%
Residential Areas	Oakville Central	25,270	27,550	2,290	76	0.3%	1.0%
	Oakville East	24,130	25,700	1,570	52	0.2%	0.7%
	Oakville North Central	14,680	38,360	23,680	789	3.3%	10.6%
	Oakville North East	1,880	20,010	18,130	604	8.2%	8.1%
	Oakville North West	270	270	0	0		0.0%
	Oakville South East	23,400	27,660	4,260	142	0.6%	1.9%
	Oakville South West	38,620	42,440	3,820	127	0.3%	1.7%
	Oakville West	57,970	65,390	7,420	247	0.4%	3.3%
Strategic Growth Areas		33,200	195,565	161,640	5,388	6.0%	72.6%
Residential Areas		188,800	247,370	61,160	2,039	1.0%	27.4%
Town of Oakville		222,100	442,940	222,790	7,426	2.4%	100.0%

^[1] Includes population net Census undercount.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Derived from Halton Region's Joint Best Planning Estimates for the Town of Oakville, summarized by Watson & Associates Economists Ltd.



Figure G-3
Town of Oakville
Total Housing, 2021 to 2051

Policy Area	Development Area	2021 Housing	2051 Housing	2021 to 2051 Housing Growth	Annual Housing Growth	Annual Growth Rate	Share of Growth
Strategic Growth Areas	Bronte GO M.T.S.A.	0	2,200	2,200	73		3.2%
	Bronte Village	1,440	1,830	390	13	0.8%	0.6%
	Downtown Oakville	510	1,030	520	17	2.4%	0.8%
	Dundas Urban Core (E)	110	2,350	2,240	75	10.7%	3.3%
	Dundas Urban Core (W)	290	2,880	2,590	86	8.0%	3.8%
	Hospital District	0	1,490	1,490	50		2.2%
	Kerr Village	2,830	4,170	1,340	45	1.3%	2.0%
	Midtown Oakville	290	9,200	8,910	297	12.2%	13.1%
	Neyagawa Urban Core	130	2,310	2,180	73	10.1%	3.2%
	Palermo Village	1,610	5,790	4,180	139	4.4%	6.1%
	Trafalgar Corridor	3,380	4,150	770	26	0.7%	1.1%
	Trafalgar Urban Core (N)	0	4,500	4,500	150		6.6%
	Trafalgar Urban Core (S)	1,180	11,910	10,730	358	8.0%	15.8%
	Uptown Core	2,760	5,890	3,130	104	2.6%	4.6%
Residential Areas	Oakville Central	8,940	9,990	1,050	35	0.4%	1.5%
	Oakville East	7,110	7,760	650	22	0.3%	1.0%
	Oakville North Central	4,140	13,580	9,440	315	4.0%	13.9%
	Oakville North East	510	6,300	5,790	193	8.7%	8.5%
	Oakville North West	0	0	0	0		0.0%
	Oakville South East	7,470	8,880	1,410	47	0.6%	2.1%
	Oakville South West	13,320	14,760	1,440	48	0.3%	2.1%
	Oakville West	17,590	20,720	3,130	104	0.5%	4.6%
Strategic Growth Areas		14,500	59,700	45,200	1,507	4.8%	66.4%
Residential Areas		59,070	81,990	22,920	764	1.1%	33.7%
Town of Oakville		73,570	141,680	68,110	2,270	2.2%	100.0%

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd.



Figure G-4
Town of Oakville
Joint Best Planning Estimates Total Housing, 2021 to 2051

Policy Area	Development Area	2021 Housing	2051 Housing	2021 to 2051 Housing Growth	Annual Housing Growth	Annual Growth Rate	Share of Growth
Strategic Growth Areas	Bronte GO M.T.S.A.	0	2,300	2,300	77		2.3%
	Bronte Village	1,200	2,680	1,480	49	2.7%	1.5%
	Downtown Oakville	600	1,510	910	30	3.1%	0.9%
	Dundas Urban Core (E)	0	1,550	1,550	52		1.6%
	Dundas Urban Core (W)	340	3,180	2,840	95	7.7%	2.9%
	Hospital District	0	2,070	2,070	69		2.1%
	Kerr Village	2,290	5,450	3,170	106	2.9%	3.2%
	Midtown Oakville	300	16,320	16,030	534	14.3%	16.2%
	Neyagawa Urban Core	170	4,220	4,050	135	11.3%	4.1%
	Palermo Village	1,660	7,880	6,220	207	5.3%	6.3%
	Trafalgar Corridor	3,390	7,600	4,210	140	2.7%	4.3%
	Trafalgar Urban Core (N)	< 10	8,660	8,660	289		8.8%
	Trafalgar Urban Core (S)	1,240	21,820	20,580	686	10.0%	20.8%
	Uptown Core	2,750	6,620	3,870	129	3.0%	3.9%
Residential Areas	Oakville Central	8,160	9,210	1,050	35	0.4%	1.1%
	Oakville East	7,410	8,030	620	21	0.3%	0.6%
	Oakville North Central	4,200	11,860	7,660	255	3.5%	7.8%
	Oakville North East	520	5,870	5,350	178	8.4%	5.4%
	Oakville North West	90	90	0	0		0.0%
	Oakville South East	7,450	8,980	1,530	51	0.6%	1.6%
	Oakville South West	14,060	15,650	1,590	53	0.4%	1.6%
	Oakville West	17,760	20,740	2,980	99	0.5%	3.0%
Strategic Growth Areas		13,940	91,870	77,930	2,598	6.5%	78.9%
Residential Areas		59,630	80,420	20,790	693	1.0%	21.1%
Town of Oakville		73,570	172,290	98,720	3,291	2.9%	100.0%

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Derived from Halton Region's Joint Best Planning Estimates for the Town of Oakville, summarized by Watson & Associates Economists Ltd.



Figure G-5
Town of Oakville
Total Employment, 2024 to 2051

Policy Area	Development Area	2024 Total Employment ^[1]	2051 Total Employment ^[1]	2024 to 2051 Employment Growth	Annual Employment Growth	Annual Growth Rate	Share of Growth
Strategic Growth Areas	Bronte GO M.T.S.A.	5,660	7,280	1,610	60	0.9%	2.2%
	Bronte Village	1,540	2,780	1,230	46	2.2%	1.7%
	Downtown Oakville	3,720	4,120	400	15	0.4%	0.5%
	Dundas Urban Core (E)	60	1,500	1,440	53	12.9%	2.0%
	Dundas Urban Core (W)	860	2,610	1,750	65	4.2%	2.4%
	Hospital District	2,510	4,100	1,590	59	1.8%	2.2%
	Kerr Village	3,430	4,010	590	22	0.6%	0.8%
	Midtown Oakville	5,660	11,620	5,960	221	2.7%	8.1%
	Neyagawa Urban Core	110	1,860	1,750	65	11.2%	2.4%
	Palermo Village	940	4,270	3,330	123	5.8%	4.5%
	Trafalgar Corridor	4,950	7,220	2,270	84	1.4%	3.1%
	Trafalgar Urban Core (N)	40	2,640	2,600	96	16.7%	3.5%
	Trafalgar Urban Core (S)	440	3,440	2,990	111	7.9%	4.1%
	Uptown Core	2,920	4,450	1,530	57	1.6%	2.1%
Residential Areas	Oakville Central	4,430	4,850	420	15	0.3%	0.6%
	Oakville East	4,140	4,440	290	11	0.3%	0.4%
	Oakville North Central	2,140	6,750	4,620	171	4.4%	6.3%
	Oakville North East	450	3,080	2,630	97	7.4%	3.6%
	Oakville North West	0	0	0	0		0.0%
	Oakville South East	4,670	5,290	620	23	0.5%	0.8%
	Oakville South West	6,830	7,550	720	27	0.4%	1.0%
	Oakville West	13,170	14,710	1,540	57	0.4%	2.1%
Strategic Growth Areas		32,830	61,890	29,060	1,076	2.4%	39.4%
Residential Areas		35,820	46,660	10,840	401	1.0%	14.7%
Commercial Area		1,630	2,830	1,200	44	2.1%	1.6%
Employment Lands^[2]		46,680	79,320	32,640	1,209	2.0%	44.3%
Town of Oakville		116,960	190,670	73,700	2,730	1.8%	100.0%

^[1] Includes work at home and no fixed place of work employment.

^[2] Includes employment in Employment Areas and Employment-Generating Lands.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Watson & Associates Economists Ltd.



Figure G-6
Town of Oakville
Joint Best Planning Estimates Total Employment, 2021 to 2051

Policy Area	Development Area	2021 Total Employment ^[1]	2051 Total Employment ^[1]	2021 to 2051 Employment Growth	Annual Employment Growth	Annual Growth Rate	Share of Growth
Strategic Growth Areas	Bronte GO M.T.S.A.	1,050	5,740	4,690	156	5.8%	4.6%
	Bronte Village	1,070	2,080	1,010	34	2.2%	1.0%
	Downtown Oakville	1,860	3,620	1,760	59	2.2%	1.7%
	Dundas Urban Core (E)	0	280	280	9		0.3%
	Dundas Urban Core (W)	1,000	3,340	2,340	78	4.1%	2.3%
	Hospital District	4,330	8,200	3,870	129	2.2%	3.8%
	Kerr Village	2,120	3,720	1,600	53	1.9%	1.6%
	Midtown Oakville	5,460	18,000	12,540	418	4.1%	12.4%
	Neyagawa Urban Core	0	1,440	1,440	48		1.4%
	Palermo Village	1,710	5,380	3,670	122	3.9%	3.6%
	Trafalgar Corridor	5,540	10,840	5,300	177	2.3%	5.2%
	Trafalgar Urban Core (N)	0	3,100	3,100	103		3.1%
	Trafalgar Urban Core (S)	0	7,930	7,930	264		7.8%
	Uptown Core	1,970	6,280	4,310	144	3.9%	4.3%
Residential Areas	Oakville Central	2,240	3,130	890	30	1.1%	0.9%
	Oakville East	2,240	3,400	1,160	39	1.4%	1.1%
	Oakville North Central	290	2,370	2,080	69	7.3%	2.1%
	Oakville North East	170	3,420	3,250	108	10.5%	3.2%
	Oakville North West	0	0	0	0		0.0%
	Oakville South East	2,730	4,950	2,230	74	2.0%	2.2%
	Oakville South West	4,830	6,540	1,710	57	1.0%	1.7%
	Oakville West	13,030	16,290	3,260	109	0.7%	3.2%
Strategic Growth Areas		26,110	79,940	53,840	1,795	3.8%	53.2%
Residential Areas		25,530	40,110	14,580	486	1.5%	14.4%
Commercial Area		4,120	5,810	1,690	56	1.2%	1.7%
Employment Lands^[2]		55,010	86,140	31,130	1,038	1.5%	30.7%
Town of Oakville		110,760	212,000	101,240	3,375	2.2%	100.0%

^[1] Includes work at home and no fixed place of work employment.

^[2] Includes employment in Employment Areas and Employment-Generating Lands.

Notes: Figures have been rounded and may not add up precisely. M.T.S.A. means major transit station area.

Source: Derived from Halton Region's Joint Best Planning Estimates for the Town of Oakville, summarized by Watson & Associates Economists Ltd.