

**Greater Golden Horseshoe, GTA and  
Hamilton  
Population, Household and  
Employment Forecasts**

**Planning and Economic Development  
Committee – February 2005**



# Background

- Series of forecasts have been produced for the GTA since 1989.
- Province, City of Toronto and four GTA Regions accepted these forecasts as basis for land use, infrastructure planning and investment decisions.
- In 2003, Hemson was retained to develop forecasts for the *Greater Golden Horseshoe (GGH) area*.
- Forecasts prepared in conjunction with Ministry of Public Infrastructure Renewal's Ontario Growth Secretariat, and municipal representation.
- The *Growth Outlook for the Greater Golden Horseshoe Report* was released on January 18 2005.



# Purpose of Forecasts

- Play vital role in planning of future regional services.
- Fundamental building block to virtually every major regional study including:
  - Designation of settlement and land use boundaries,
  - Housing needs,
  - Road, water, sewer and transit planning,
  - Planning for human services ( schools, hospitals, police),
  - Development charges and fiscal planning, and
  - Private sector investments.



# Assumptions for GGH Economic Future

- Long term outlook for Canada, Ontario and GGH economy is very positive.
- Continued concentration of economic and population growth in large urban regions.
- On balance the GGH economy is one of the most heavily industrialized in North America.
- Migration is the primary generator of population growth.
- The aging of the population has enormous implications for growth and planning in the GGH.
- Forecast assumes appropriate long term infrastructure investment and funding arrangements are in place.



# GGH Forecast 2001 to 2031

- Low, reference and high forecasts prepared to 2031.
- Reference forecast represents Hemson's most reasonable set of assumptions for future economic outlook:
  - GGH population anticipated to increase by 3.7 million reaching 11.5 million up from 7.8 million in 2001.
  - GGH employment forecast to reach 5.6 million up from 3.8 million in 2001, a 1.75 million increase.
  - Households will grow much faster than population with the GGH adding almost 1.7 million households increasing from 2.7 million to 4.4 million.



# Outer Ring Forecast

- Outer Ring (Municipalities outside GTAH) forecast:

	<b>Growth</b>	<b>Total</b>
Population	900,000	2.9 million
Jobs	368,000	1.24 million
Households	451,000	1.2 million

- Most of Outer Ring growth is driven by out-migration from the GTAH.
- Major infrastructure investments in transportation networks and servicing capacity are required to reach forecasts.



# GTAH Forecast 2001 to 2031

- Population ranges from 8 million in the low forecast to 9.3 million in the high forecast.
- Updated reference population forecast is 500,000 higher for the GTA than the previous forecast prepared in 2000.
- Major differences include: Higher migration assumptions over the long term, more rapid declines in mortality rates and recent high growth experienced post 2001.
  - GTAH population anticipated to increase by 2.8 million reaching 8.6 million from 5.8 million in 2001.
  - GTAH employment to increase 1.39 million reaching 4.3 million from 2.9 million in 2001.
  - 1.26 million new households will be formed



# Forecast Scenarios

- Three scenarios (current trends, compact, and more compact) prepared for the reference forecast.
- Current trends scenario is based on the current level of policy intervention, continues current and future settlement patterns and assumes necessary infrastructure to support growth is provided.
- Compact and more compact scenarios are policy forecasts to reflect greater levels of policy intervention to achieve more compact built form.
- Policy intervention involves:
  - shifting housing preferences away from singles towards rows and apartments and,
  - to redirecting growth to emerging and priority areas identified in the *Places to Grow* discussion paper.





# 2031 FORECAST SUMMARY

## (000'S)

	<b>2004 EXISTING</b>	<b>UPDATED 2031 FORECAST</b>	<b>2005-2031 GROWTH</b>	<b>2005-2031 % INCREASE</b>	<b>INCREASE FROM CURRENT 2031 FORECAST</b>
<b>POPULATION</b>	<b>890</b>	<b>1.45-1.53</b>	<b>560-640</b>	<b>63-72</b>	<b>90-170</b>
<b>EMPLOYMENT</b>	<b>430</b>	<b>750-780</b>	<b>320-350</b>	<b>74-81</b>	<b>16-46</b>
<b>HOUSING</b>	<b>264</b>	<b>490-510</b>	<b>226-246</b>	<b>86-93</b>	<b>61-81</b>



# Challenges

- A dramatic shift in housing choices and preferences required.
- The more compact scenario requires a shift of 195,000 (590,000 people) units across GTAH from single to medium and high density units over 30 years.
- More compact, mixed use communities required with Centres and Corridors served by transit.
- Better live-work proximity is essential.
- Co-ordinated provincial and municipal land use, infrastructure and investment decisions are required to accommodate growth.
- Need to provide servicing in priority growth areas in a timely fashion.
- Planning process needs to be streamlined to support Vision.



# Next Steps

- Update our Growth Management System using inter-departmental approach.
- Meet with local municipalities to determine local municipal implications.
- 2005 Workplan:
  - Land Supply/Demand Analysis
  - Transportation, Water and Sewer Master Plan updates
  - Fiscal Impact analysis
  - Intensification options



# Conclusion

- Forecasts to be used as input to *Places to Grow* document.
- Forecasts call for large increase in population, households and jobs. (1.26 million new homes required in the GTAH).
- Growth Management approach requires:
  - Long term infrastructure investment.
  - Fiscal policy more in line with objective of compact communities.
  - Integrated planning approach to planning process and approvals.
- York Region long range documents need to be revisited

