



## **Are the Growth Plan Population Forecasts on Target?**

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A Background Report Prepared by:

**Frank A. Clayton, Ph.D.**

**Senior Research Fellow**

Research Assistant:

**Colin Wolfe**

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**CENTRE FOR URBAN RESEARCH AND LAND DEVELOPMENT**

**Ryerson University**

Faculty of Community Services  
Centre for Urban Research and Land Development  
350 Victoria Street  
Toronto, ON M5B 2K3

General Enquiries  
416-978-5000 ext. 3348

**Campus Location**

111 Gerrard Street East,  
3rd floor, GER-204D  
Toronto, Ontario

[www.ryerson.ca/cur](http://www.ryerson.ca/cur)  
[cur@ryerson.ca](mailto:cur@ryerson.ca)

The opinions expressed in this background report are those of the author only and do not represent opinions and views of either CUR or Ryerson University.

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## EXECUTIVE SUMMARY

Fundamental to the *Growth Plan for the Greater Golden Horseshoe* (the “Growth Plan”) are the forecasts of population and employment for the Greater Golden Horseshoe (GGH) as a whole and for the region’s component upper- and single-tier municipalities (“municipalities”). Recently-released population estimates by Statistics Canada (“Statcan”) for 2011-2014 are applied as a check of the veracity of the population forecasts underlying the Growth Plan in the current five-year period (2011-2016) of the longer-term planning horizon (to 2031 or 2041). Key findings of the comparison are:

- According to Statcan, the City of Toronto recorded the most growth in terms of people during 2011-2014 – an average of 35,000 persons each year;
- Toronto accounted for one-third of all population growth in the Greater Toronto Area and Hamilton (“GTAH”) and 29% of growth in the GGH during 2011-2014;
- Conversely, the non-Toronto portions of the GTAH area accounted for two-thirds of the estimated growth in the GTAH during 2011-2014 – an average of 69,000 people per year on average;
- The estimated population growth for the entire GGH is modestly less than the forecast – 121,000 versus 134,000 persons per year on average;
- The forecast of population growth for the GTAH as a whole is on the mark with the estimates – 103,000 versus 104,000 persons per year on average;
- There are notable municipal divergences within the GTAH with estimated growth in the City of Toronto and Peel Region exceeding the forecasts (by 7,000 and 4,000 persons per year, respectively, while York and Durham Regions fell short (by 7,000 and 3,000 persons per year, respectively);
- Outer Ring municipalities recorded significantly less growth than forecast with average growth of just 17,000 persons per year versus a forecast of 31,000;
- All three sub-forecast areas within the Outer Ring had lower growth than forecast with the largest absolute difference occurring in Waterloo Region where growth fell short by 4,000 persons on average per year.

## 1. BACKGROUND<sup>1</sup>

Fundamental to the *Growth Plan for the Greater Golden Horseshoe*<sup>2</sup> (the “Growth Plan”) are the forecasts of population and employment for the Greater Golden Horseshoe (GGH) as a whole and for the region’s component upper- and single-tier municipalities (“municipalities”). The growth forecasts for the years 2031 and 2041 are included in Schedule 3 of the Growth Plan. Section 2.2.1 of the Growth Plan instructs municipalities to use these forecasts for planning and managing growth.

The population and employment forecasts are the product of detailed forecasts for the GGH and its municipalities prepared by Hemson Consulting Ltd. (“Hemson”) in two technical reports dated November 2012 and June 2013.<sup>3</sup> The Hemson forecasts for the 2011-2031 and 2011-2041 periods were prepared in five-year intervals corresponding with timing of the quinquennial Census of Canada. The first five-year period is 2011-2016.

Statistics Canada (“Statcan”) prepares population estimates by census division each year with the mid 2014 estimates recently released.<sup>4</sup> These estimates can be used as a check on the performance of the Hemson forecasts for 2011-2016. This is done by comparing average annual growth of the Statcan estimates for the 2011-2014 period with the average annual growth of the Hemson forecasts for the 2011-2016 period.

It is not possible to conduct a similar assessment of the Hemson employment forecasts for 2011-2016 given the lack of current estimates of employment by place of work for the GGH and the limitations of the National Household Survey conducted in 2011.

This paper examines the average annual growth forecasts of Hemson for 2011-2016 in relation to the Statcan estimates of actual population growth during the first three years of the five-year period. It focuses on divergences between the two sets of population numbers. It does not deal with reasons for these differences.

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<sup>1</sup> This report was authored by Dr. Frank A. Clayton, Senior Research Fellow, CUR with research assistance provided by Colin Wolfe. The opinions expressed in this background report are those of the author only and do not represent opinions and views of either CUR or Ryerson University.

<sup>2</sup> Province of Ontario, “Growth Plan for the Greater Golden Horseshoe,” 2006, Office Consolidation, June 2013.

<sup>3</sup> Hemson Consulting Ltd., “Greater Golden Horseshoe Growth Forecasts to 2014,” Technical Report (November 2012) and Addendum, June 2013.

<sup>4</sup> Statistics Canada, “Estimates of Population by Age and Sex for Census Divisions, Census Metropolitan Areas and Economic Regions (Component Method),” July 1, 2014 estimates released on February 11, 2005.

## 2. THE HEMSON POPULATION FORECASTS TO 2031 - GGH, GTAH AND OUTER RING<sup>5</sup>

Hemson anticipates substantial growth in the GGH throughout 2011 – 2013 continually rising from 667,000 persons in 2011-2016 to 803,000 by 2026-2031. Growth for the 20 year period is forecast at just over 2.9 million.

**Figure 1**  
**Population Forecasts underlying Schedule 3 of the**  
**Growth Plan for the Greater Golden Horseshoe (GHH)**

Population Growth by 5 Year Periods			
	GTAH*	Outer Ring	Total GGH
	Persons (000s)		
<b>Historical</b>			
2001-2006	515	142	697
2006-2011	515	71	586
<b>Forecast</b>			
2011-2016	516	150	667
2016-2021	528	177	709
2021-2026	546	208	754
2026-2031	584	218	803
Percent Distribution			
<b>Historical</b>			
2001-2006	78.4	21.6	100.0
2006-2011	87.9	12.1	100.0
<b>Forecast</b>			
2011-2016	77.5	22.5	100.0
2016-2021	75.0	25.0	100.0
2021-2026	72.4	27.6	100.0
2026-2031	72.9	27.1	100.0

\*GTAH = Greater Toronto Area and Hamilton

Source: Hemson Consulting, 2013 Addendum, p. 62.

The forecasts also call for a shift in the location of growth from Greater Toronto Area and Hamilton (“GTAH”) to the Outer Ring. The area delineated by Hemson as the Outer Ring is shown on the map in Appendix A. The Outer Ring’s share of GGH growth rises from 12.1% in 2006-2011 to 27.6% in 2021-2026.

It appears that Hemson regarded the very low share of GGH growth occurring in the Outer Ring in 2006-2011 (a decline to 12.1% from 21.6% in 2001-2006) as an anomaly. Hemson notes that assumptions about net intraprovincial migration are critical to future population growth in the Outer Ring. For its forecast, Hemson adopted a forecast by the Ontario Ministry of Finance that there will be increasing annual numbers of intra-provincial migrants in the province.<sup>6</sup>

<sup>5</sup> While the Hemson forecasts extend to 2041, this report looks at the period up to 2031 to provide context for the 2011-2016 analysis.

<sup>6</sup> Hemson Consulting Ltd., “Greater Golden Horseshoe Growth Forecasts to 2041,” November 2012, pp. 22 and 45.

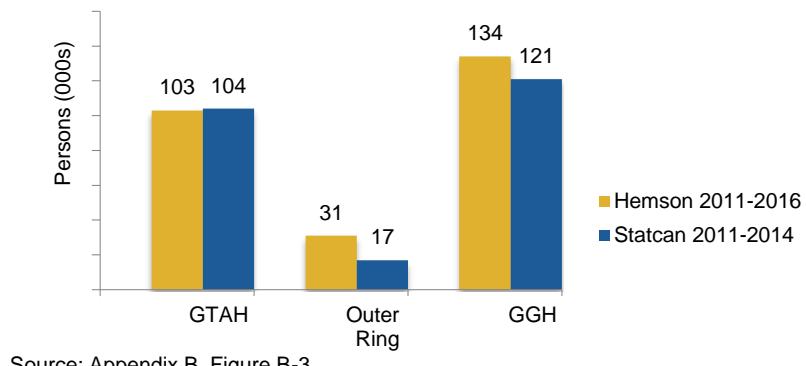
### 3. HEMSON POPULATION FORECAST FOR 2011-2016 – GGH, GTAH AND OUTER RING

Three highlights emerge from the data in Figure 2 which compares average annual growth in the GGH as a whole and its highest level components – the GTAH and the Outer Ring:

- Estimated actual growth for the GGH, while strong, is running modestly behind what Hemson has projected – an average of 121,000 persons compared to the forecast of 134,000 – a shortfall of about 10 %;
- The GTAH forecast is right on the mark with estimated growth – an average of 103,000 and 104,000 persons per year, respectively; and
- The Outer Ring population growth is falling considerably short of the forecast growth – only 17,000 on average per year compared to a forecast of 31,000 persons.

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**Figure 2:**  
**Comparison of Average Annual Population Growth for**  
**GGH, GTAH and Outer Ring**



Source: Appendix B, Figure B-3

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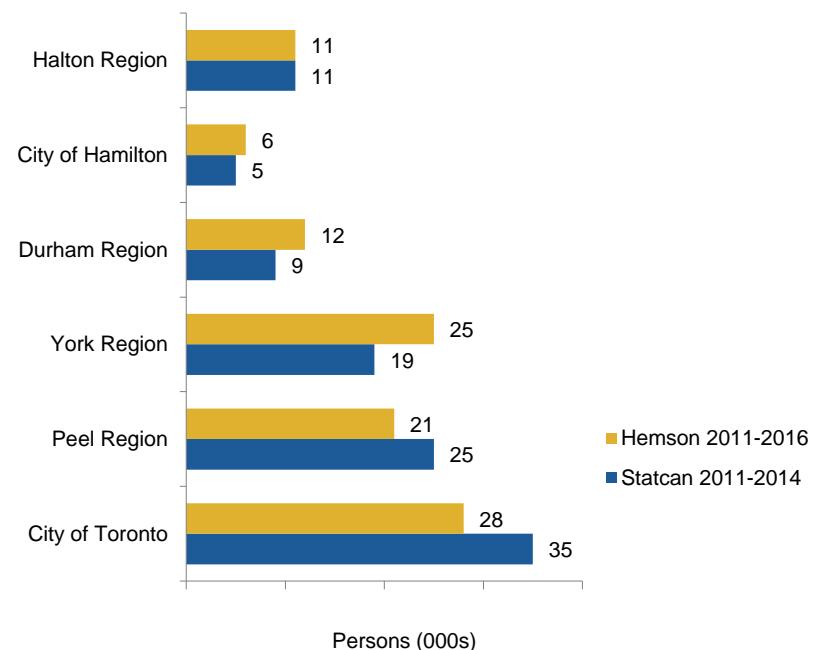
## 4. HEMSON POPULATION FORECAST FOR 2011-2016 – GTAH BY MUNICIPALITY

There are marked differences between the distribution of estimated actual growth within the GTAH and the forecast growth:

- Growth has been more robust in the City of Toronto than what was forecast – an average of 35,000 persons per year versus a forecast of 28,000 growth;
- Peel Region has also exhibited larger than expected growth (by an average of 4,000 per year); and
- York and Durham Region are both lagging in average annual population growth – by 6,000 and 3,000 persons.

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**Figure 3:**  
**Comparison of Average Annual Population Growth for Regions and Single-Tier Cities in the GTAH\***



\* These regions and single-tier cities are referred to as "municipalities" in the text.

Source: Appendix B, Figure B-3

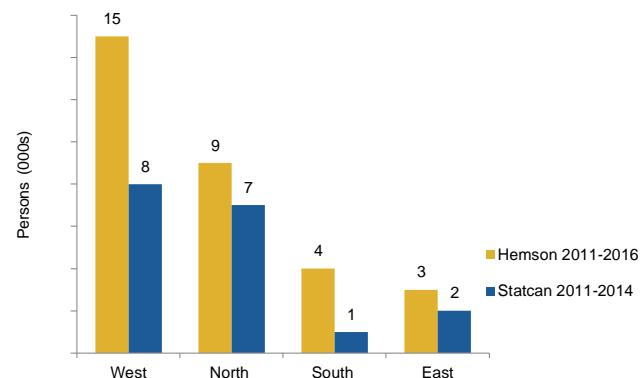
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## 5. HEMSON POPULATION FORECAST FOR 2011-2016 – OUTER RING BY SUB-FORECAST AREA<sup>7</sup>

All four sub-forecast areas making up the Outer Ring are falling short of the population forecast by Hemson for 2011 – 2016 with the relative gap between forecast and estimated actual average annual growth being most pronounced for the south sub-forecast area (see Figure 4). In absolute numbers, the shortfall is largest in the west – an average of 7,000 persons per year.

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**Figure 4:**  
**Comparison of Average Annual Population Growth**  
**for Outer Ring by Sub-Forecast Area**



Source: Appendix B, Figure B-3

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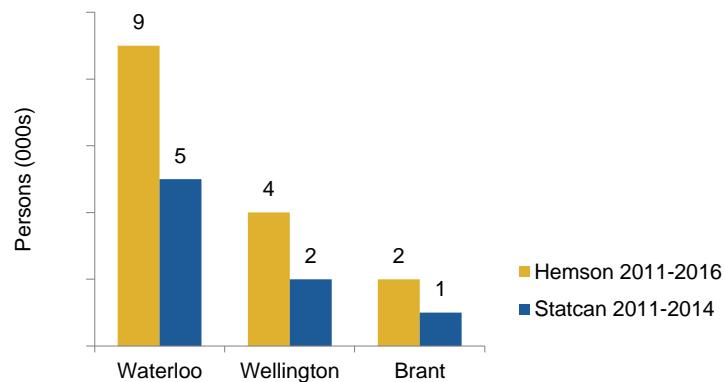
<sup>7</sup> See map in Appendix A for the boundaries of the sub-forecast areas and component municipalities.

## 6. HEMSON POPULATION FORECAST FOR 2011-2016 – WEST SUB-FORECAST AREA OF OUTER RING BY MUNICIPALITY

While estimated population growth all three municipalities in the west sub-forecast area during 2011 – 2014 fell short of forecast growth, the gap in absolute numbers is widest for Waterloo Region – an average shortfall of 4,000 persons per year. The Wellington and Brant census divisions also recorded significant relative shortfalls.<sup>8</sup>

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**Figure 5:**  
**Comparison of Average Annual Population Growth for**  
**Western Sub-Forecast Area of Outer Ring by Census**  
**Division**



Source: Appendix B, Figure B-3

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<sup>8</sup> Wellington County as defined here includes the City of Guelph and Brant County includes the City of Brantford.

**APPENDIX A: MAP OF GREATER GOLDEN HORSESHOE AND  
OUTER RING SUB-FORECAST AREAS**

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**Figure A-1**  
**Map of Greater Golden Horseshoe Including Outer Ring Sub-Forecast Areas**



Source: Hemson Consulting Ltd., "Greater Golden Horseshoe Growth Forecasts to 2041," November 2012, pp. 12.

**APPENDIX B: AVERAGE ANNUAL POPULATION GROWTH IN THE  
GGH BY MUNICIPALITY: ESTIMATED ACTUAL  
2011 – 2014 AND FORECAST 2011 – 2016**

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**Figure B-1**  
**Greater Golden Horseshoe Population Forecasts, 2011-2016**

	Total Population		Total Population Growth 2011-2016	Average Annual Population Growth	
	2011	2016		2011-2016	Persons (000s)
		Persons (000s)			Percent Distribution
<b>GTA</b>					
Toronto	2,725	2,865	140	28	21.0
Peel	1,350	1,455	105	21	15.7
Halton	520	575	55	11	8.2
York	1,072	1,199	127	25	19.0
Durham	631	691	60	12	9.0
Subtotal	6,298	6,785	487	97	72.9
<b>GTA and Hamilton</b>					
GTA	6298	6785	487	97	72.9
Hamilton	540	568	28	6	4.2
Subtotal	6,838	7,353	515	103	77.1
<b>Outer Ring - West*</b>					
Waterloo	528	573	45	9	6.7
Wellington	216	234	18	4	2.7
Brant	133	143	10	2	1.5
Subtotal	877	950	73	15	10.9
<b>Outer Ring - North*</b>					
Dufferin	59	63	4	1	0.6
Simcoe	461	503	42	8	6.3
Subtotal	520	566	46	9	6.9
<b>Outer Ring - South*</b>					
Haldimand**	46	48	2	0	0.3
Niagara	446	463	17	3	2.5
Subtotal	492	511	19	4	2.8
<b>Outer Ring - East*</b>					
City of Kawartha Lakes	75	79	4	1	0.6
Peterborough	139	147	8	2	1.2
Northumberland	85	88	3	1	0.4
Subtotal	299	314	15	3	2.2
<b>Subtotal - Total Outer Ring</b>	2,188	2,341	153	31	22.9
<b>Grand Total GGH</b>	<b>9,026</b>	<b>9,694</b>	<b>668</b>	<b>134</b>	<b>100.0</b>

\* By Census division which includes all municipalities located within the boundaries of a county or region.

\*\* Includes only the former Haldimand County which is now part of the Regional Municipality of Haldimand and Norfolk.

Source: Hemson Consulting, 2013; Addendum, p. 62.

**Figure B-2**  
**Greater Golden Horseshoe Population Estimates, 2011-2014**

	Total Population		Total Population Growth	Average Annual Population Growth	
	2011	2014		2011-2014	2011-2014
	Persons (000s)		Persons (000s)	Percent Distribution	
<b>GTA</b>					
Toronto	2,705	2,809	104	35	28.7
Peel	1,341	1,416	75	25	20.7
Halton	517	551	34	11	9.4
York	1,066	1,122	56	19	15.4
Durham	627	654	27	9	7.4
Subtotal	6,256	6,552	296	99	81.5
<b>GTA and Hamilton</b>					
GTA	6,256	6,552	296	99	81.5
Hamilton	536	552	16	5	4.4
Subtotal	6,792	7,104	312	104	86.0
<b>Outer Ring - West*</b>					
Waterloo	524	538	14	5	3.9
Wellington	215	220	5	2	1.4
Brant	140	144	4	1	1.1
Subtotal	879	902	23	8	6.3
<b>Outer Ring - North*</b>					
Dufferin	59	60	1	0	0.3
Simcoe	459	479	20	7	5.5
Subtotal	518	539	21	7	5.8
<b>Outer Ring - South*</b>					
Haldimand-Norfolk**	112	111	(1)	(0)	(0.3)
Niagara	443	446	3	1	0.8
Subtotal	555	557	2	1	0.6
<b>Outer Ring - East*</b>					
Kawartha Lakes	75	76	1	0	0.3
Peterborough	138	140	2	1	0.6
Northumberland	84	86	2	1	0.6
Subtotal	297	302	5	2	1.4
<b>Subtotal - Total Outer Ring</b>	2,249	2,300	51	17	14.0
<b>Grand Total GGH</b>	<b>9,041</b>	<b>9,404</b>	<b>363</b>	<b>121</b>	<b>100.0</b>

\*By Census division which includes all municipalities located within the boundaries of a county or region.

\*\* Only the former Haldimand County is part of GGH.

Source: Statcan, CANSIM Table 051-0062.

**Figure B-3**  
**Comparison: Average Annual Population Growth, 2011-2014/16**

	Hemson	Statistics Canada	Difference (Statistics Canada - Hemson)	Hemson	Statistics Canada
	2011-2016	2011-2014	2011-2014	2011-2016	2011-2014
	Persons (000s)			Persons (000s)	
<b>GTA</b>					
Toronto	28	35	7	21.0	28.7
Peel	21	25	4	15.7	20.7
Halton	11	11	0	8.2	9.4
York	25	19	(7)	19.0	15.4
Durham	12	9	(3)	9.0	7.4
Subtotal	97	99	1	72.9	81.5
<b>GTA and Hamilton</b>					
GTA	97	99	1	72.9	81.5
Hamilton	6	5	0	4.2	4.4
Subtotal	103	104	1	77.1	86.0
<b>Outer Ring - West*</b>					
Waterloo	9	5	(4)	6.7	3.9
Wellington	4	2	(2)	2.7	1.4
Brant	2	1	(1)	1.5	1.1
Subtotal	15	8	(7)	10.9	6.3
<b>Outer Ring - North*</b>					
Dufferin	1	0	0	0.6	0.3
Simcoe	8	7	(2)	6.3	5.5
Subtotal	9	7	(2)	6.9	5.8
<b>Outer Ring - South*</b>					
Haldimand**	0	(0)	(1)	0.3	(0.3)
Niagara	3	1	(2)	2.5	0.8
Subtotal	4	1	(3)	2.8	0.6
<b>Outer Ring - East*</b>					
Kawartha Lakes	1	0	0	0.6	0.3
Peterborough	2	1	(1)	1.2	0.6
Northumberland	1	1	0	0.4	0.6
Subtotal	3	2	(1)	2.2	1.4
<b>Subtotal - Total</b>					
Outer Ring	31	17	(14)	22.9	14.0
Grand Total GGH	134	121	(13)	100.0	100.0

\* By Census division which includes all municipalities located within the boundaries of a county or region.

\*\* Haldimand in the Hemson forecast and Haldimand-Norfolk in the Statcan estimate.

Source: Figures B-1 and B-2