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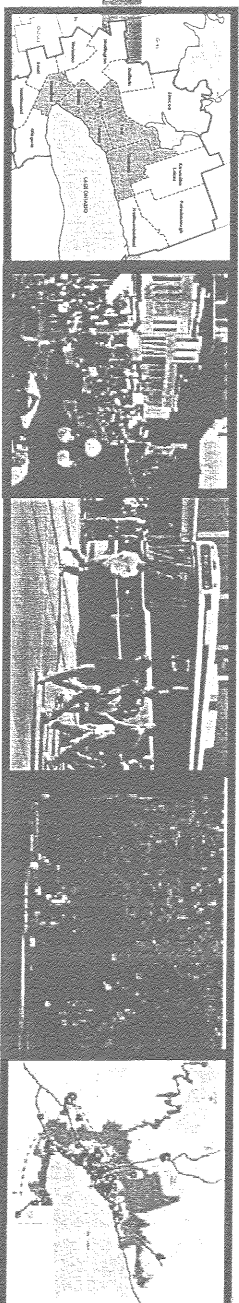
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# THE GROWTH OUTLOOK FOR THE GREATER GOLDEN HORSESHOE



**HEMSON**  
Consulting Ltd.

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## EXECUTIVE SUMMARY

This report presents a set of growth forecasts for the Greater Golden Horseshoe (GGH), the area made up of the Greater Toronto Area–Hamilton (GTAH) and the remaining Regions and Counties in the GGH (the Outer Ring). The forecasts and report were prepared with the assistance of the GTAH Forecast Committee, composed of representatives of the Cities of Toronto and Hamilton, the four Regions and the Province as well as the Outer Ring Advisory Committee composed of representatives of the upper-tier municipalities and separated cities in the Outer Ring and the Province.

A principal set of assumptions are made about the economic future of Ontario, followed by more specific assumptions related to population, household and employment growth. The principal assumptions are:

1. The long term economic outlook is very positive. Continued economic growth in Canada, Ontario and the GGH is anticipated, and is the foundation of the forecast.
2. Economic and population growth will continue to be concentrated in large urban regions. Canada's population growth continues to be concentrated in a few major areas, especially in the GGH.
3. The orientation of the local economy will still be predominately industrial. On balance, the GGH is one of the most heavily industrialised large metropolitan economies in Canada and the United States.
4. Migration will increasingly be the primary generator of population growth.

5. The population will continue to age and will be a critical demographic force affecting growth. Age-specific housing choices and labour force participation have enormous implications for growth and planning in the GGH.
6. The appropriate long-term planning and funding arrangements are in place to accommodate anticipated growth pressures. Specifically it is assumed that there will be ongoing investment in infrastructure.

A low, reference and high forecast has been prepared. The Reference forecast incorporates, in our view, the most reasonable set of assumptions about the future economy. The Reference forecast anticipates that the population and employment of the GGH will increase respectively by more than 3.7 million people, and almost 1.8 million jobs to 2031. A significant amount of this growth will be accommodated within the GTAH. This is illustrated in the following two tables.

Greater Golden Horseshoe Population Reference Forecast (in 000s)			
	GTAH	Outer Ring	Total GGH
1991	4,840	1,670	6,510
2001	5,810	1,980	7,790
2011	6,860	2,230	9,090
2021	7,780	2,560	10,340
2031	8,620	2,880	11,500
Growth, 2001–2031	2,810	900	3,710

Note: Total population including Census under coverage

Source: Statistics Canada and Hemson Consulting Ltd.

Greater Golden Horseshoe Employment by Place of Work Reference Forecast (in 000s)			
	GTAH	Outer Ring	Total GGH
1991	2,500	720	3,220
2001	2,940	870	3,810
2011	3,630	1,010	4,640
2021	4,030	1,130	5,160
2031	4,320	1,240	5,560
Growth, 2001–31	1,380	370	1,750

Source: Statistics Canada and Hemson Consulting Ltd.

One of the major characteristics of the forecast is that households will increase at a much faster rate than population in the GGH. This is due primarily to the aging of the population, a decline in household sizes and a corresponding increase in the number of households. As shown below, the GGH will add almost 1.7 million new households to 2031.

Greater Golden Horseshoe Households Reference Forecast (in 000s)			
	GTAH	Outer Ring	Total GGH
1991	1,660	610	2,270
2001	1,970	710	2,680
2011	2,430	850	3,280
2021	2,860	1,020	3,880
2031	3,230	1,160	4,390
Growth, 2001–31	1,260	430	1,710

Source: Statistics Canada and Hemson Consulting Ltd.

With respect to the distribution of growth within the GTAH and Outer Ring, three growth scenarios have been prepared — the Current Trends Scenario, Compact Scenario and the More Compact Scenario.

- The Current Trends Scenario is our best judgement of the most likely distribution of growth based upon the current level of policy intervention, current and future settlement patterns, and the provision of necessary infrastructure to support growth.
- The Compact and More Compact scenarios are policy-based forecasts. They have been run with specific input from the Province and Committees, in order to reflect greater levels of policy intervention required to achieve the objectives of the *Places to Grow* discussion paper released by the Province in the summer of 2004.

The distribution of growth within the Outer Ring is primarily related to the ability to provide infrastructure. Because most of the growth will be driven by out-migration from the GTAH, communities that are most attractive are anticipated to be the ones subject to the strongest growth pressure.

The distribution of growth within the GTAH is based upon physical constraints to growth. Growth is distributed based upon built form and the share of new building activity, in an effort to reflect the “on the ground” choices that households and firms make regarding built form, price and location. As a result, the scenarios for the GTAH vary primarily by housing mix and the geographic distribution of growth. The more change that is suggested from the established patterns, the more interventionist the policy environment required.

Population Scenario Comparison (2031) (In 000s)				
Distribution Scenario	2001 Population	Forecast 2031 Population		
		Current Trends	Compact	More Compact
Northumberland	80	100	95	95
Peterborough	130	145	150	145
Kawartha Lakes	70	105	100	100
Haldimand	45	55	55	55
Niagara	425	485	510	510
Brant	130	170	175	170
Waterloo	455	720	730	755
Wellington	195	320	320	335
Dufferin	55	90	80	80
Simcoe	390	690	665	635
Total	1,980	2,875	2,875	2,875

Employment Scenario Comparison (2031) (In 000s)				
Distribution Scenario	2001 Employment	Forecast 2031 Employment		
		Current Trends	Compact	More Compact
Northumberland	30	35	35	35
Peterborough	55	60	60	60
Kawartha Lakes	20	30	25	25
Haldimand	15	20	20	20
Niagara	185	205	220	215
Brant	55	70	70	70
Waterloo	235	365	365	380
Wellington	100	160	160	165
Dufferin	20	30	25	25
Simcoe	155	265	255	240
Total	865	1,235	1,235	1,235

Population Scenario Comparison (2031) (In 000s)				
Distribution Scenario	2001 Population	Forecast 2031 Population		
		Current Trends	Compact	More Compact
Toronto	2,590	3,000	3,080	3,140
Peel	1,030	1,640	1,640	1,610
York	760	1,530	1,500	1,450
Durham	530	990	960	980
Halton	390	800	780	740
Hamilton	510	660	660	700
Total	5,810	8,620	8,620	8,620

Employment Scenario Comparison (2031) (In 000s)				
Distribution Scenario	2001 Employment	Forecast 2031 Employment		
		Current Trends	Compact	More Compact
Toronto	1,440	1,620	1,640	1,670
Peel	530	880	870	860
York	390	780	780	750
Durham	190	360	350	370
Halton	190	400	390	370
Hamilton	210	290	300	310
Total	2,940	4,330	4,330	4,330

Source: Statistics Canada and Hemson Consulting Ltd.

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