

## Population Projections Report

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Prepared by:	Melissa Riou Planning Services
Recommended by:	General Manager of Growth and Infrastructure

## Report Summary

This report provides information regarding the City's Population, Household and Employment Projections (the Projections) to 2051 based on data from the 2021 Census. The City of Greater Sudbury uses the Projections to inform financial, capital, service level and policy planning, including the upcoming development charges background study.

## Relationship to the Strategic Plan, Health Impact Assessment and Community Energy & Emissions Plan (CEEP)

The City of Greater Sudbury through Council's Corporate Strategic Plan (2019-2027) is committed to responsive, fiscally prudent, open governance. The Population, Household and Employment Projections Report will provide information on population, household and employment growth to 2051, including demographic profiles and trends on a community level. This outlook over the next 30 years will assist the City in developing its capital, service and policy planning in the future. The report also aligns with the Community Energy and Emissions Plan (CEEP) goal to "Achieve Energy Efficiency and Emissions Reductions by Creating Compact, Complete Communities".

## Financial Implications

There are no financial implications associated with this report.

## Background

The Projections forecast out 30 years to 2051 and have been completed using information from the 2021 Census in addition to recent building permit activity. The Projections include three scenarios: low, reference and high growth. The report concludes that CGS has experienced higher growth than was projected in the last forecast and will grow more over the next 30 years than the last 20 years and recommends using the reference scenario for financial planning and growth management policies.

## Key Findings

The key findings of the Projections are:

**Greater Sudbury is the Northern Ontario Growth Leader:** CGS stands out as the only major urban area in Northern Ontario with a growing population. In contrast, Thunder Bay, Sault Ste. Marie, Timmins and North Bay all experienced stagnant or declining populations between 2001 and 2021.

**Greater Growth is Anticipated:** The City's current population is estimated to be 170,210, with 71,530 occupied households and 79,330 jobs. The City is projected to grow over the next 30 years to between 188,510 to 200,000 people, to add 10,300 to 11,600 new households and create 11,400 to 18,000 new jobs under the reference and high growth scenarios. The projected growth is expected to be distributed across the City with the former City of Sudbury (54%), Valley East (16%), Rayside-Balfour (12%), Nickel Centre (7%) and Walden (6%) experiencing the highest growth.

**Employment Lands:** It is imperative for CGS to plan for employment areas that are situated to maximize employment opportunities and allow new residents to work relatively close to where they live. Nearly 40% of the projected 11,400 to 18,000 new jobs will be in designated employment areas.

**Immigration:** Migration will play an increasingly important role in growing Greater Sudbury's economy. New international migrants are needed to help fill the gap in Canada's labour shortage. As well, to retain a population of young adults with families, CGS will need to continue providing housing options that represent complete communities and are near essential services and areas of employment.

**Regional Service Centre:** Greater Sudbury continues to act as a regional service centre for nearby municipalities including North Bay and Sault Ste. Marie and provides a draw with additional amenities. The regional service function provides some stability to the long-term growth outlook.

**Shifting Patterns and Age Structure:** Shifting patterns in fertility and mortality rates in Ontario will affect the growth outlook. The age structure of the population will have a wide range of influence on how Greater Sudbury grows, specifically housing demand. With the number of people aged 75 plus doubling in share of population in 30 years, the need for affordable housing and appropriate housing choices should remain a City priority.

**Demand for Different Forms of Housing:** The household forecast is converted into a forecast on housing units by type based on unit type preference by age of primary household maintainer. The demand for apartments is forecast to remain steady over the period at between 35% and 40% of all housing growth. The main shift in housing type will be the emergence of many more row housing units as opposed to single and semi-detached. It is forecast that over the next 30 years, over 10% of all housing unit growth will be in the form of row housing. This is a significant shift as in the last 15 years the row housing growth only accounted for less than 5% of all new units.

## **The Importance of Population Projections**

Municipalities undertake population projections for several reasons including to ensure compliance with provincial policy, as well as to provide a foundation for infrastructure planning, land use planning, municipal services and development charges.

## **Growth Plan for Northern Ontario (GPNO)**

The Growth Plan for Northern Ontario requires that municipalities maintain an updated Official Plan and develop other supporting document, including strategies for maintaining a 20-year supply of lands for a variety of employment uses in appropriate locations to support economic development objectives.

## **Provincial Policy Statement, 2020 (PSS)**

The basis of the Provincial Policy Statement (PPS) is to build strong communities, protect the environment and resources and support a strong economy. Provincial interests are identified in the vision section, and they include the wise management of growth, the wise use and management of the province's resources and protecting the long-term health and safety of the population. The PPS focuses growth and development within urban areas and rural settlement areas while supporting the viability of rural areas. Efficient development patterns, optimize the use of land, resources and public investments in infrastructure and public service facilities. Further, the PPS requires municipalities to maintain an adequate supply of lands to accommodate residential growth, both in the short term and the long term.

The current 2020 PPS requires planning authorities to maintain a fifteen-year supply of lands designated and available for residential development and a three-year supply of suitably zoned lands. Similarly, the proposed Provincial Planning Statement, 2023 would require that sufficient land be made available to accommodate an appropriate range and mix of land use to meet projected needs for at least 25 years, which would be a slight change from the current requirement to maintain a supply for a time horizon of up to 25 years.

### **City of Greater Sudbury Official Plan**

One of the key pieces of information that shapes Official Plan policies is the forecasted population trends over the next 20 years and beyond to ensure that the Provincial requirements related to land supply, infrastructure and housing can be met. Growth forecasts provide the foundation for infrastructure planning as well as the development charges background study.

### **Projections for Multiple Scenarios**

The City of Greater Sudbury follows an approach that accounts for various economic factors, as well as forecasting multiple scenarios that allow the City to plan for each. These forecasts call for the City to grow at different rates and are used to test the adequacy of the City's land supply and infrastructure capacity. Population projections are updated every five (5) years to incorporate new census data and to account for any new economic trends. The three scenarios developed are: low, middle "reference", and high.

**Low Scenario:** reflects the most recent Ministry of Finance projections and reflects a return to pre-pandemic live-work dynamics and the level of international migration not being as robust as current trends suggest it will be. This scenario also assumes an aging population that is not replaced adequately by new younger residents.

**Reference Scenario:** represents a sustained number of international migrants. CGS should plan for increased levels of all forms of migration (International, Intra-Provincial (those coming from within Ontario) and Inter-Provincial (those coming from other Provinces)). To accommodate these new residents, the City should continue to provide and plan for suitable housing types, opportunities for employment and access to essential services. The reference scenario is used for municipal land use, finance, social and capital planning purposes.

**High Scenario:** The high scenario increases the share of the population represented by young adults and adds to the economic outlook of the reference scenario by incorporating influences from investment in the Ring of Fire. The high scenario is used to ensure that Greater Sudbury has an adequate supply of both residential and employment lands.

### **Planning Implications of the Projections**

In preparing multiple projections, the City of Greater Sudbury is ensuring that it is ready for a range of growth scenarios. With respect to land use planning, policies of the Official Plan are shaped by population projections, which assist in ensuring optimized use of lands and ensuring that the supply is adequate given the characteristics of the population.

Under the high growth scenario, the City would see 11,600 new residential units created over 30 years or approximately 400 per year. Under the PPS requirements the City would have to ensure that it has a 3 year supply (1,200 units) of residential units available through lands that are suitably zoned, including units in draft approved or registered plans and a 15 year supply (6,000 units) of lands which are designated and available for residential development.

At present, Greater Sudbury has nearly 6,300 residential units approved through draft plans of subdivision or site plans, but yet to be built. This amount far exceeds the Provincially required supply of 1,200 units for the next 3 years under the high growth scenario and is nearly enough to meet the Province's 15 year requirements. Additionally, the City has an estimated 250 hectares of land that is within the settlement boundary and designated for future development, which would more than meet the requirements for 15 and 25 year planning horizons. Staff are in the process of developing new GIS based tools to monitor the City's developable land supply as part of the City's upcoming Housing Supply Strategy and will provide further updates to the City's land supply through that process.

Additionally, to encourage residential development the City has implemented several changes over the past few years including amendments to residential parking rates, amendments to the Shopping Centre Commercial Zone to permit multi-residential development, retirement homes and long-term care facilities, and introduced development charge exemptions and reductions for certain developments. An upcoming series of reports on Housing Needs Assessment, As-of-Right Policy Review along with the Population Projections Report will inform the Housing Supply Strategy anticipated to be presented to Council in December, 2023.

Population projections not only inform how much growth is anticipated, but where that growth is anticipated to occur, which allows the municipality to provide the necessary infrastructure and services. The Employment Land Strategy has identified the need for a suitable supply of at least 100 net hectares to accommodate anticipated demand and provide a broad range of options among prospective occupants in terms of location, land pricing, servicing and planning designation/permitted uses over the next 20 years. Staff have received direction to undertake detailed design for those strategic employment areas that require upgrades to ensure an adequate supply of serviced land is available for employment use and continue to implement additional actions aligning with both the Employment Land Strategy and the employment projections and recommendations of the Population Projections Report.

### **Conclusion**

The Population Projections Report provides potential growth scenarios for the City and will be used to inform future capital, service and policy development, including the preparation of the upcoming development charges background study and by-law. Based on the projected growth, Greater Sudbury has more than sufficient residential and industrial land supply to accommodate anticipated demand over the next 30 years.

### **Resources Cited**

1. Affordable Housing Update, September 26, 2022, <https://pub-greatersudbury.escribemeetings.com/Meeting.aspx?Id=b0e0000d-c0b2-47b9-8a08-cd5bdcf1d2c9&Agenda=Agenda&lang=English&Item=24&Tab=attachments>
2. Ontario Housing Affordability Task Force Recommendations Summary, April 11, 2022 <https://pub-greatersudbury.escribemeetings.com/FileStream.ashx?DocumentId=43727>
3. Provincial Policy Statement, 2020 <https://www.ontario.ca/page/provincial-policy-statement-2020>
4. Proposed Provincial Planning Statement, 2023 <https://ero.ontario.ca/notice/019-6813>
5. Housing Supply Strategy, February 7, 2023, <https://pub-greatersudbury.escribemeetings.com/Meeting.aspx?Id=45cb9903-efa8-4dbc-8754-c95b1dd1773c&Agenda=Agenda&lang=English&Item=50&Tab=agenda>
6. Employment Land Strategy, Over To You website <https://overtoyou.greatersudbury.ca/els>
7. Affordable Housing Strategy website, <https://www.greatersudbury.ca/do-business/planning-and-development/affordable-housing-strategy/>
8. Outlook for Growth to 2046, April 9, 2018, <https://pub-greatersudbury.escribemeetings.com/FileStream.ashx?DocumentId=31112>