



Centre for Urban Research and Land Development

CUR's Top 10 Takeaways from Statistics Canada's Latest Population Estimates for the Greater Golden Horseshoe (GGH)

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

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Highlights

The top ten highlights that CUR found most interesting for the Greater Golden Horseshoe (GGH) and its municipalities (census subdivisions) from the annual population estimates recently released by Statistics Canada. The analysis was based on average annual population growth between 2016 and 2018 and was calculated and compared to growth in 2011-2016.

- # 1: Population growth accelerated in the GGH, led mainly by a growth spurt in the City of Toronto. In contrast, York Region saw its population growth drop sharply;**
- #2: Net immigration was the predominant source of population growth in the GGH, with the percentage of temporary residents (e.g., refugees and international students) growing rapidly;**
- #3: About 55% of all net immigration (permanent and temporary) into the GGH flowed into the City of Toronto;**
- #4: More people moved to the GGH from other provinces, but the net flow was comparatively small;**
- #5: The Greater Toronto Area (GTA) on net lost people to more affordable municipalities in the Outer Ring of the GGH and the rest of Ontario - Simcoe County benefited the most from this net influx;**
- #6: Annual births rose in the GGH as more women aged 30-39 had babies;**
- #7: Millennials (aged 22 to 36 in 2018) outnumbered other generations in the City of Toronto and Peel Region. Boomers (aged 54 to 73) still dominated in the other municipalities;**
- #8: Generation Z (aged 21 and under) was now the fastest growing generation in the GGH;**
- #9: York Region was the only municipality where the Millennial population actually declined; and**
- #10: Millennials and Generation X headed from the GTA to the Outer Ring municipalities in search of more affordable housing, particularly ground-related housing like single-detached houses.**

Statistics Canada prepares annual population estimates as of July 1 of every year. The most recent estimates released were taken as of July 1st, 2018. These are the top ten highlights that CUR found most interesting from the most recently released population estimates for the Greater Golden Horseshoe (GGH) (see map in Appendix A) and its municipalities (census subdivisions). We've looked at how population trends over 2016 to 2018 have changed relative to 2011 to 2016 period.

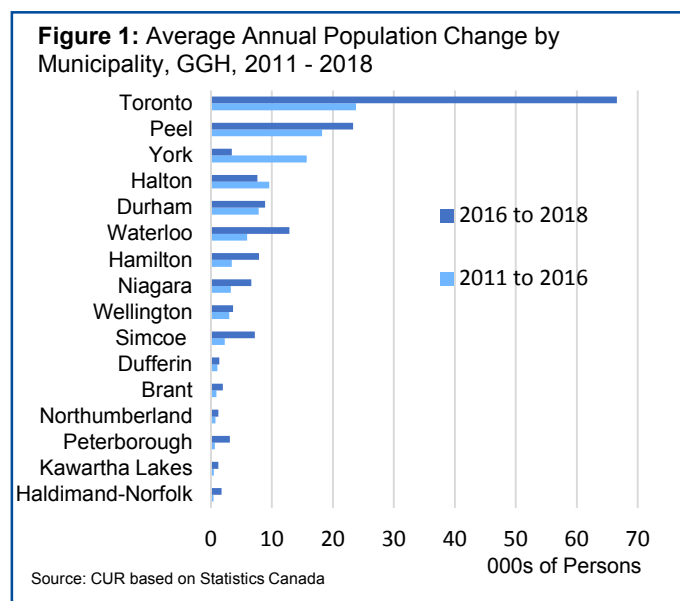
The reader is cautioned that these annual estimates are subject to revision after the 2021 Census of Canada results are released. Appendix B compares the annual estimates for 2011-2016 released after the 2016 Census to pre-2016 Census estimates.

1: Population growth accelerated in the GGH, led by a growth spurt in the City of Toronto and in many Outer Ring Municipalities

The estimates show that annual population growth in the GGH accelerated sharply between 2016 and 2018. Population in the GGH grew by an annual average of 164,000 people per year between 2016 and 2018, up from an average of 100,000 per year between 2011 to 2016.

Much of this growth was in the City of Toronto where population growth almost tripled (see Figure 1). Population in the City of Toronto grew by an average of 66,561 persons per year between 2016 and 2018, up from an annual average of 23,800 persons per year between 2011 to 2016. While Peel Region remained the second fastest growing region, population in Simcoe, Waterloo, Hamilton and Niagara grew by more than double the number of people per year between 2016 and 2018 than it did in the prior five years.

Population growth in York Region, in contrast, slowed considerably. York Region grew by just 2,997 persons per year between 2016 and 2018, about a fifth of the growth rate experienced between 2011 to 2016.



Definition: *Population growth* is expressed in terms of change in number of persons per year, reflecting growth over the 12-months ending July 1st of the given year.

Definition: *Municipality* refers to Statistics Canada definition of census subdivision.

#2: Immigration to the GGH was increasingly being led by temporary residents

Immigration hit record levels in 2017 and 2018. The GGH attracted an annual average of roughly 157,000 net permanent and temporary immigrants between 2016 and 2018 (see Figure 2), up from 103,000 between 2011 and 2016.

Leading the charge was a four-fold increase in those permitted into Canada on a temporary basis, including refugees, international students and those with a temporary work visa. The number of net new temporary residents who arrived in the GGH averaged 55,973 persons per year between 2016 and 2018, up from 11,690 persons in the prior five years (see Figure 2).

About three quarters of those who came to the GGH on a temporary basis were under the age of 21 and reflected a combination of refugees and students (see Figure 3). In contrast, Millennials accounted for 55% of net permanent immigration. (The definitions for generations used in the report can be found on page 9.)

Definitions: *Net immigration* is the number of immigrants less emigrants. *Immigrants* are both permanent and net temporary (those permitted in to Canada on a temporary basis, including temporary workers, international students and refugees that are not yet permanent). *Net temporary residents* refers to the number of non-permanent residents coming to the GGH less the number leaving. *Permanent immigration* refers to anyone residing in Canada, born outside of Canada and who is not a temporary immigrant.

Figure 2: Permanent and Temporary Immigration, GGH, 2006-2018

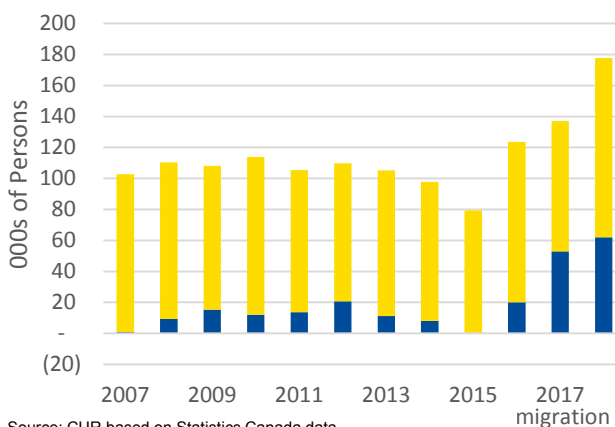
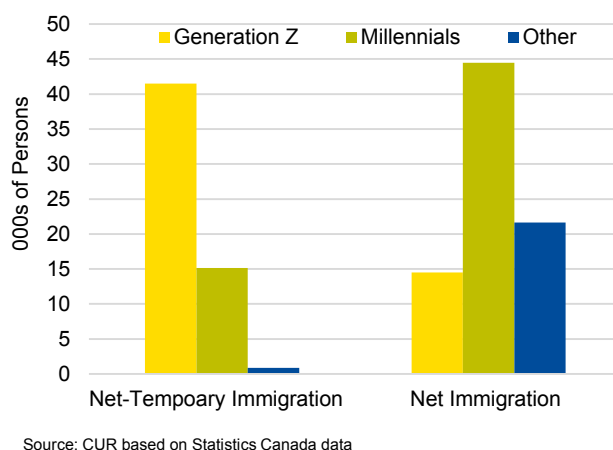


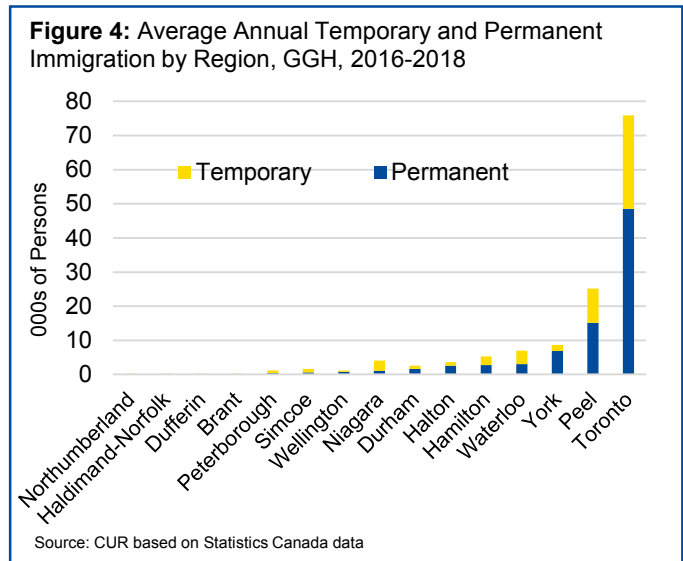
Figure 3: Average Annual Population Change by Component of Change, GGH, 2011-2018



#3: 55% of immigration (permanent and temporary) into the GGH flowed into the City of Toronto

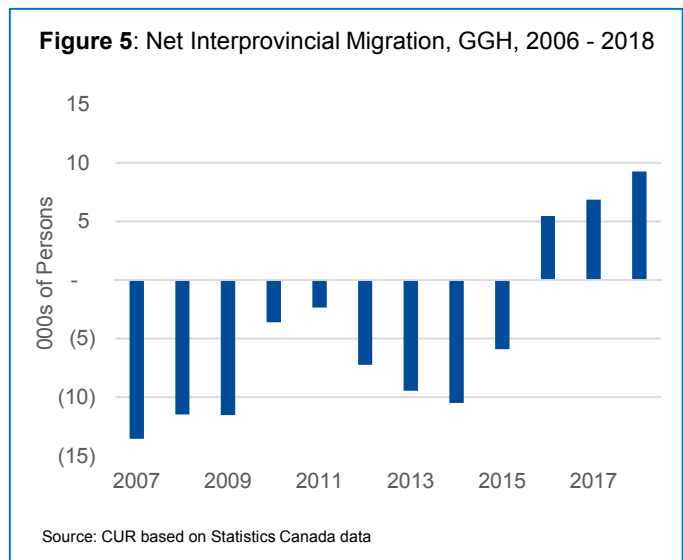
Net immigration remained the largest source of population growth for the region.

Roughly 55% of immigration coming into the GGH headed to the City of Toronto (see Figure 4). Peel was a distant second when it came to newcomer preference – attracting 20% of all permanent and temporary immigration between 2016 and 2018. Immigration was less of a boom to other municipalities in the GGH.



#4: More people moved to the GGH from other provinces

Net interprovincial migration into the GGH was positive in 2016 for the first time in over a decade (see Figure 5). This means that more people came to the GGH from outside of Ontario between 2016 and 2018 than left the province. Historically, the trend has been the reverse. On net, an average of 8,600 persons per year moved to the GGH from other provinces between 2016 and 2018, compared to the 2011 to 2016 period when the region lost an average of 4,600 persons per year to other provinces.



Definition: *Net interprovincial migration* is the number of in-migrants from other provinces less the number of out-migrants to other provinces.

#5: The Greater Toronto Area (GTA) lost people to more affordable municipalities in Ontario; Simcoe benefited the most

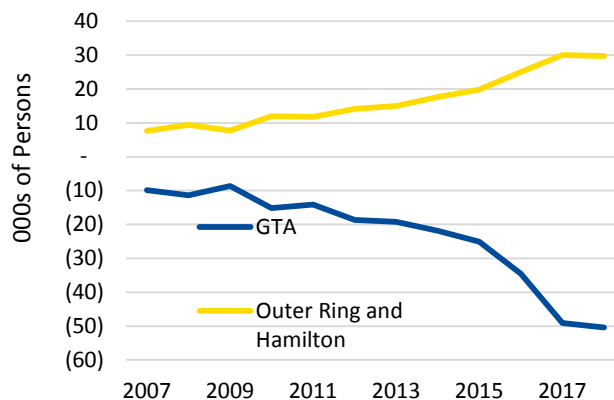
Definitions: *Net intraprovincial migration* is number of people coming to a municipality or the GGH as a whole from other parts of Ontario (in-migrants) over and beyond the number of people leaving the municipality of the GGH for another location in Ontario (out-migrants).

The GTA lost population to the Outer Ring. Figure 6 shows intraprovincial migration data for the GTA and the Outer Ring and Hamilton. The negative numbers in Figure 6 mean that more people left the GTA than were attracted to it. The GTA lost roughly 50,000 people on average between 2016 and 2018, double the rate experienced in the decade prior.

In contrast, the Outer Ring and Hamilton attracted more people from other parts of the province than it has in the past. The Outer Ring and Hamilton attracted an average of 30,000 people per year from other parts of the province between 2016 and 2018, also more than double the average of the prior decade.

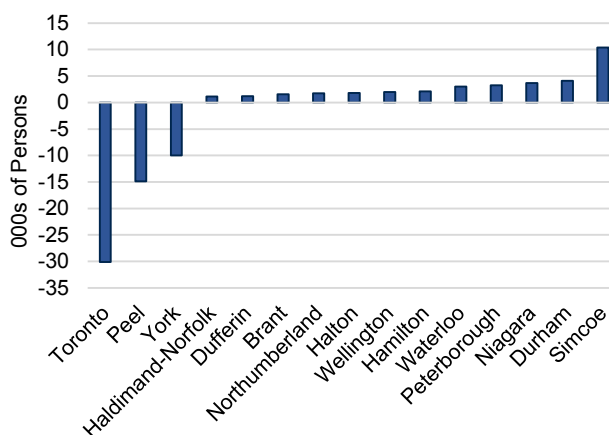
Households left Toronto, Peel and York in large numbers and headed to cheaper regions, including Simcoe, Niagara, Durham, Hamilton and Waterloo. Toronto, Peel and York combined lost 55,000 persons per year between 2016 and 2018 through intraprovincial migration, while all other municipalities gained a combined 36,000 persons (see Figure 7).

Figure 6: Net Intraprovincial Migration by Region, GGH, 2006 - 2018



Source: CUR based on Statistics Canada data

Figure 7: Average Annual Intraprovincial Migration by Municipality, GGH, 2016-2018



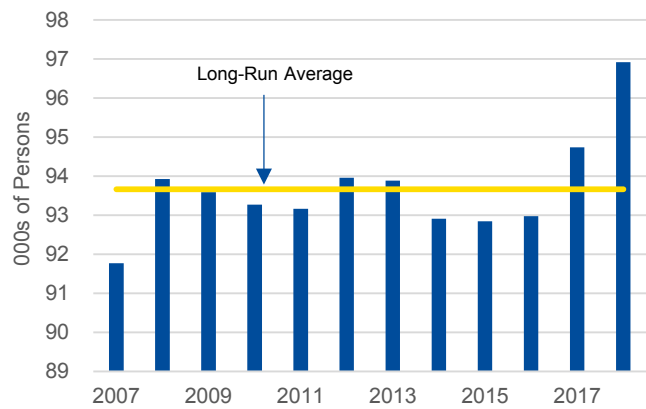
Source: CUR based on Statistics Canada data

#6: Births rose in the GGH

The average annual number of births rose by 3,000 per year between 2016 and 2018 compared to the previous decade (see Figure 8). Millennials are aging and starting to have children, so we expect the number of births to continue to increase into the future.

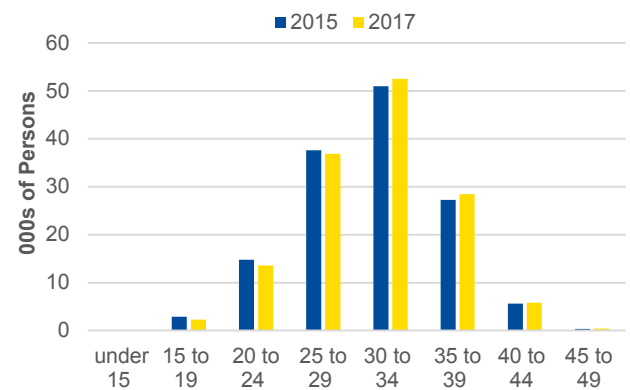
The data on births by age of mother is only available up to 2017 and only for all of Ontario. The data showed that as of 2017, all of the increases in births in Ontario occurred among those who were 30 to 39 years of age (see Figure 9). Birth rates fell for women under the age of 30.

Figure 8: Annual Births, GGH, 2006 - 2018



Source: CUR based on Statistics Canada data

Figure 9: Births by Age of Mother, Ontario, 2015 and 2017



Source: CUR based on Statistics Canada data

Age

#7: Millennials outnumbered other generations in the City of Toronto and Peel Region. Boomers still dominated in the other municipalities

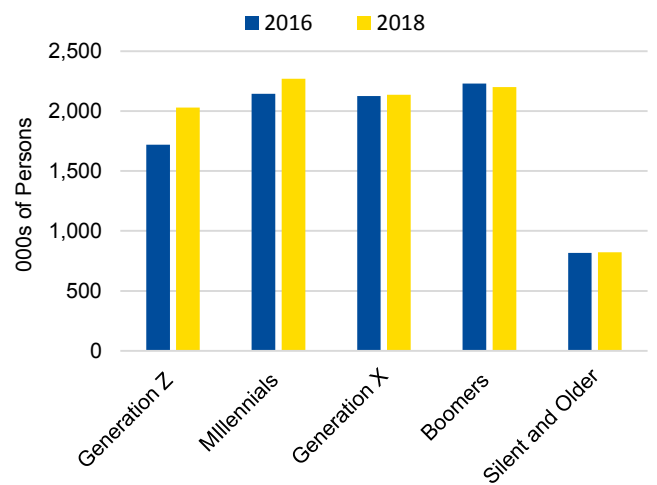
Definition: *Generation Z:* a person born after 1996. *Millennial:* a person born between 1981 and 1996; *Generation X* a person born between 1965 and 1980; *Boomer:* a person born between 1946 and 1964; *Silent Generation and older:* a person born before 1946.

CUR had previously defined Millennials as those born between 1981 and 2001. However, the generational definitions used in this report were taken from recent research out of the Pew Research Center in the United States. Pew now defines the cut-off year for Millennials as 1996, and this has become a widely accepted definition. The cut-off year for Generation Z has not yet been defined.

Even with the recently amended definitions of demographic generations by the Pew Research Center, Millennials remained the largest cohort in the GGH – having taken over the top spot from the Boomers in 2017 (see Figure 10)

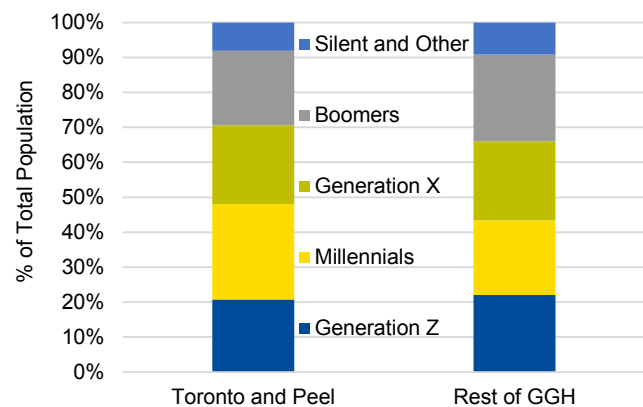
However, broken down by municipality, Millennials outnumbered the other generations only in the City of Toronto and Region of Peel (see Figure 11). 51% of all Millennials in the GGH lived in these two municipalities, compared to 45% of the total population. Boomers were still the largest generation everywhere else. The Generation X cohort grew in size in the Outer Ring, as this generation moved away from the core to find more affordable low-density housing.

Figure 10: Population by Generation, GGH, 2016- 2018



Source: CUR based on Statistics Canada data

Figure 11: Population by Age Generation, GGH, 2018

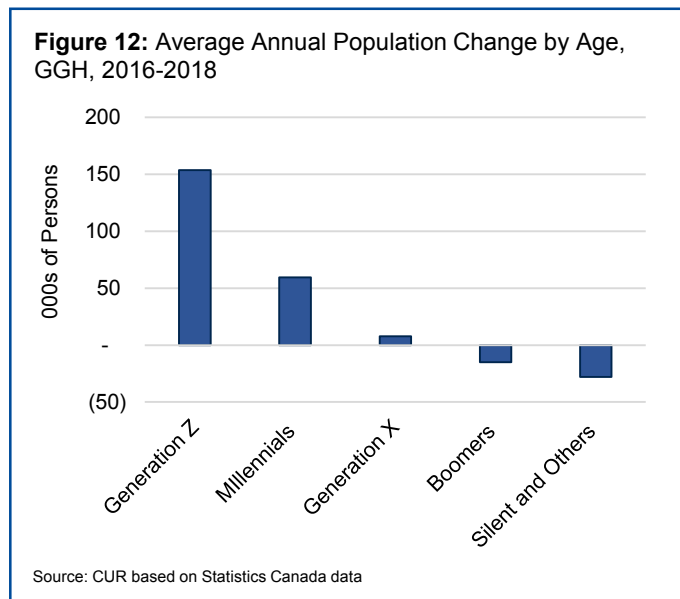


Source: CUR based on Statistics Canada data

#8: Generation Z was now the fastest growing generation

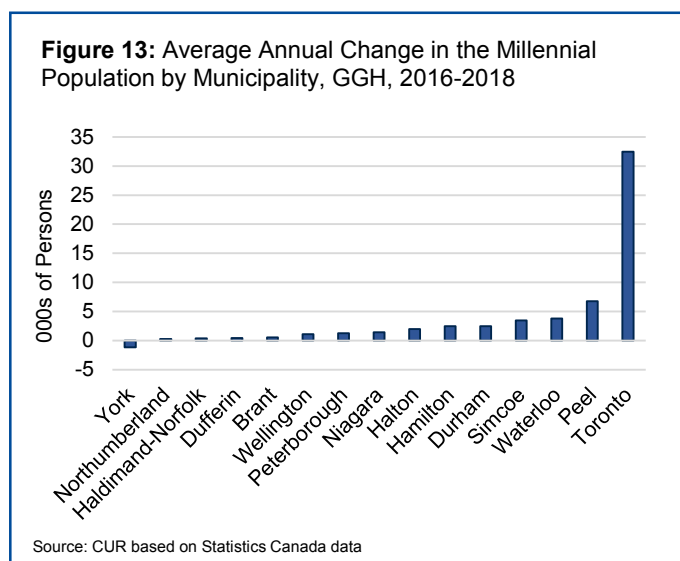
Millennials were the largest generation, but they were not the fastest growing. Generation Z grew faster (see Figure 12), growing by an average of 150,000 persons per year between 2016 and 2018, compared a growth of just roughly 60,000 new Millennials per year. This was the result of both increasing birth rates and the fact that Generation Z accounted for a large share of the non-permanent residents moving to the region.

The cut-off year for Generation Z has yet to be defined. Once this generation is more concretely defined, this story may change.



#9: York Region was the only municipality where the Millennial population declined

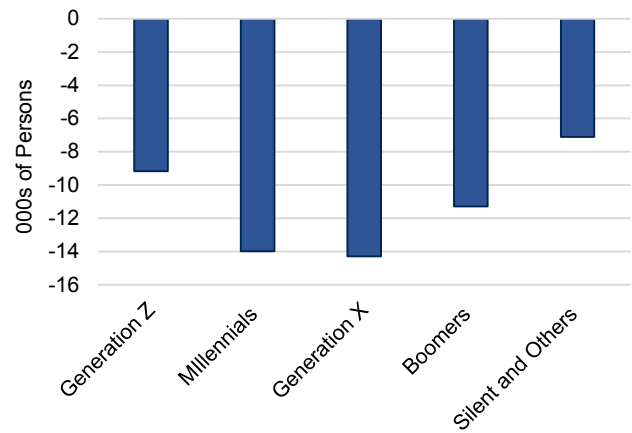
Both Toronto and Peel had more than enough net immigration to offset the fact that many Millennials left these municipalities for cheaper, more spacious digs in the 905 regions and the Outer Ring. However, York did not have the benefit of immigration to help offset a net loss of Millennials (see Figure 13). York's failure to attract or retain Millennials contributed to its waning population growth. The sluggish production of single-detached houses and other forms of ground-related homes likely contributed to York's slowing population growth.



#10 Millennials and Generation X headed for the suburbs in search of affordable housing

The intraprovincial migration estimates by generation showed that those leaving the GTA for the Outer Ring were not just Boomers cashing in on their expensive homes in the GTA. Millennials, Generation X and their children led the push out of the GTA in search of affordable housing (see Figure 14). Generation Z was likely being pulled along for the ride, being the children of Millennials and Generation X.

Figure 14: Average Annual Net Intraprovincial Migration by Generation, GTA, 2016 -2018



Source: CUR based on Statistics Canada data

Appendix A: Geographic Definitions of Regions in the Greater Golden Horseshoe (GGH)

The lowest geographic area for which estimates are prepared by Statistics Canada are referred to as census divisions. Within the GGH, these census divisions include single-tier municipalities (Cities of Toronto and Hamilton), regional municipalities (e.g. Regions of Peel, Halton, Durham and York) and counties (e.g. Simcoe, Wellington, and Brant with any associated cities, as Barrie for example, included within the census division boundaries).

The Outer Ring includes areas outside of the Greater Toronto Area and Hamilton (GTAH).

Figure A-1: Census Divisions in the Greater Toronto Area and Hamilton (GTAH)



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

Appendix B: Comparison of Preliminary Annual Population Estimates for 2011 to 2016, With Post-2016 Census Estimates

Statistics Canada releases population estimates every year for the 12-month period ending on July 1st. However, the annual population estimates are revised every five years following the publication of the results of the latest Census of Canada data. The population estimates released earlier this year included population estimates up to July 2018. This release, however, was also the first to incorporate the 2016 census results. This means that the preliminary population estimates for the years 2011 to 2016 were revised.

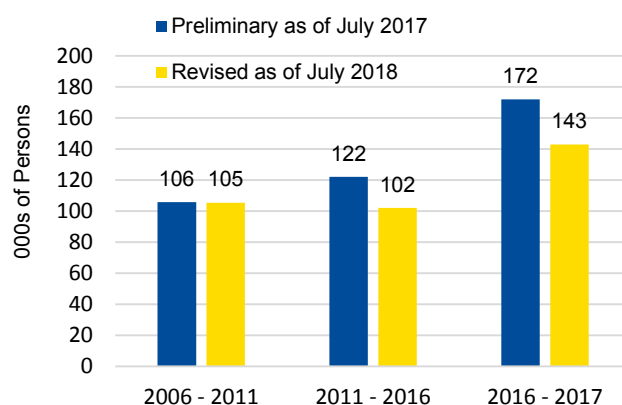
Population estimates for 2011 to 2016 were revised downward significantly. Population in the GGH grew by almost 20,000 less persons (17% less) on average per year than had been originally estimated (see Figure B-1).

The revised data also showed that population growth slowed between 2011 and 2016 compared to the previous five years. This contrasted to the preliminary estimates made in 2017 which had shown a pick-up in population growth during that time frame.

The revisions were largest regarding the City of Toronto (which grew by 9,000 fewer persons per year than estimated), but were also fairly broadly-based across municipalities in the Greater Toronto Area (GTA) (see Figure B-2). Estimates for the Outer Ring were right on the mark.

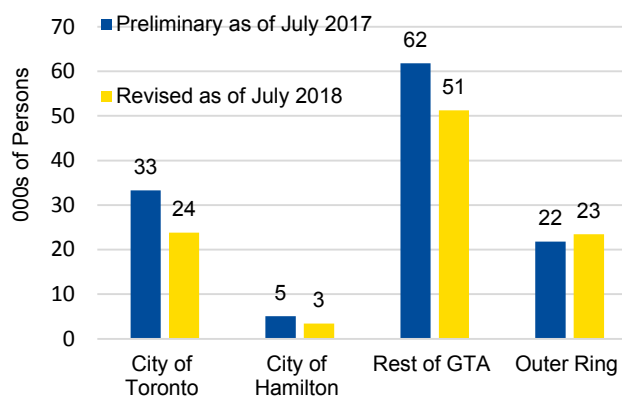
While we now have population estimates up to July 1st 2018, the post-2016 population estimates are preliminary and subject to revision once the results of the 2021 Census of Canada becomes available.

Figure B-1: Statistics Canada Estimates of Average Annual Population Change*, GGH, 2006-2016



Source: CUR based on Statistics Canada data
*Reflects change over 12-month period ending in given year

Figure B-2: Statistics Canada Estimates of Population Change by Region, GGH, Average Annual, 2011-2016



Source: CUR based on Statistics Canada data