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REGIONAL PLAN ISSUE PAPER

PRELIMINARY POPULATION & HOUSING ANALYSIS

HALIFAX

June 2021

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INTRODUCTION

The Regional Municipal Planning Strategy (the Regional Plan) is the document that Regional Council uses to guide land use. It emphasizes a balanced approach to development and establishes targets for directing the location of new housing over the life of the Regional Plan (2006-2031), which are based on population projections.

Each time the Regional Plan is reviewed, the Municipality assesses its progress toward achieving the housing growth targets. This requires evaluating population and housing forecasts and their relationship to the available supply of developable land, housing supply and demand, and the provision of a range of housing choices.

The 2014 Regional Municipal Planning Strategy was based on a population projection of approximately 1% growth year-over-year. Statistics Canada's population estimates have shown HRM growing at a much faster rate - by around 2% each year since 2017. This has led HRM to generate a new population and housing projection which is provided in this Issue Paper.

The Municipality will also be evaluating the supply of developable lands and rate of housing development compared to the 2014 Regional Plan's growth targets, along with the growth targets suggested in the 2017 Integrated

Mobility Plan, and will use this analysis to determine how the targets should be adjusted.

This Issue Paper is a first step in exploring how well-positioned our land use rules are to respond to potential housing demand and population growth and will include analysis by type of housing (such as apartment or ground-based). Housing supply is influenced by many different factors, some which the Municipality can influence (i.e.: land use policy and regulations) and some which the Municipality does not have control over (i.e.: supply of materials and labour, market costs, rate of construction).

The goal of this Issue Paper is to understand the dynamic between the projected demand for housing and Halifax's land use capacity to accommodate residents in different housing types. The projections are not meant to be predictions, but ways of testing and assessing the resiliency of our policy, regulations and growth targets. This will help us to understand the different ways we can create strong policy to support housing our citizens today and in the future.

KEY QUESTIONS CONSIDERED IN THIS ISSUE PAPER:

How many people might be living in Halifax in 2031 and 2050?

How many housing units will be needed for the population to live in?

What type of housing might be needed?

What is Halifax's capacity for additional housing based on existing policy and anticipated future policy?

Are any changes to housing policy needed to accommodate demand or reflect changing conditions?

GROWTH MANAGEMENT TARGETS

In 2006, Regional Council approved the Regional Plan as the first comprehensive plan for the Municipality. It directed 25% of household growth to the Regional Centre (Peninsula Halifax and Dartmouth between the Circumferential Highway and Halifax Harbour); 50% of household growth to suburban communities (communities serviced with publicly managed water and wastewater services outside the Regional Centre) and the remaining 25% to rural areas (the lands outside of the service boundary).

During the first five-year review of the Plan, it was found HRM was underperforming against these targets. A study was commissioned to assess the public, private and social costs and benefits of various growth scenarios from 2011 to 2031. The 2013 study by Stantec, called [“Quantifying the Costs and Benefits of Alternative Growth Scenarios”](#) (known as the Stantec Study) concluded that continued adherence to the Regional Plan growth targets would save the municipality \$670 million in costs and that significant additional cost savings could be achieved by increasing growth in the Regional Centre.

In response, the 2014 Regional Plan adjusted the growth targets to direct at least 75% of new housing units to the Regional Centre and suburban communities, with at least 25% of

new housing units to the Regional Centre. It also set out a requirement that the Municipality maintains a 15-year supply of serviced land.

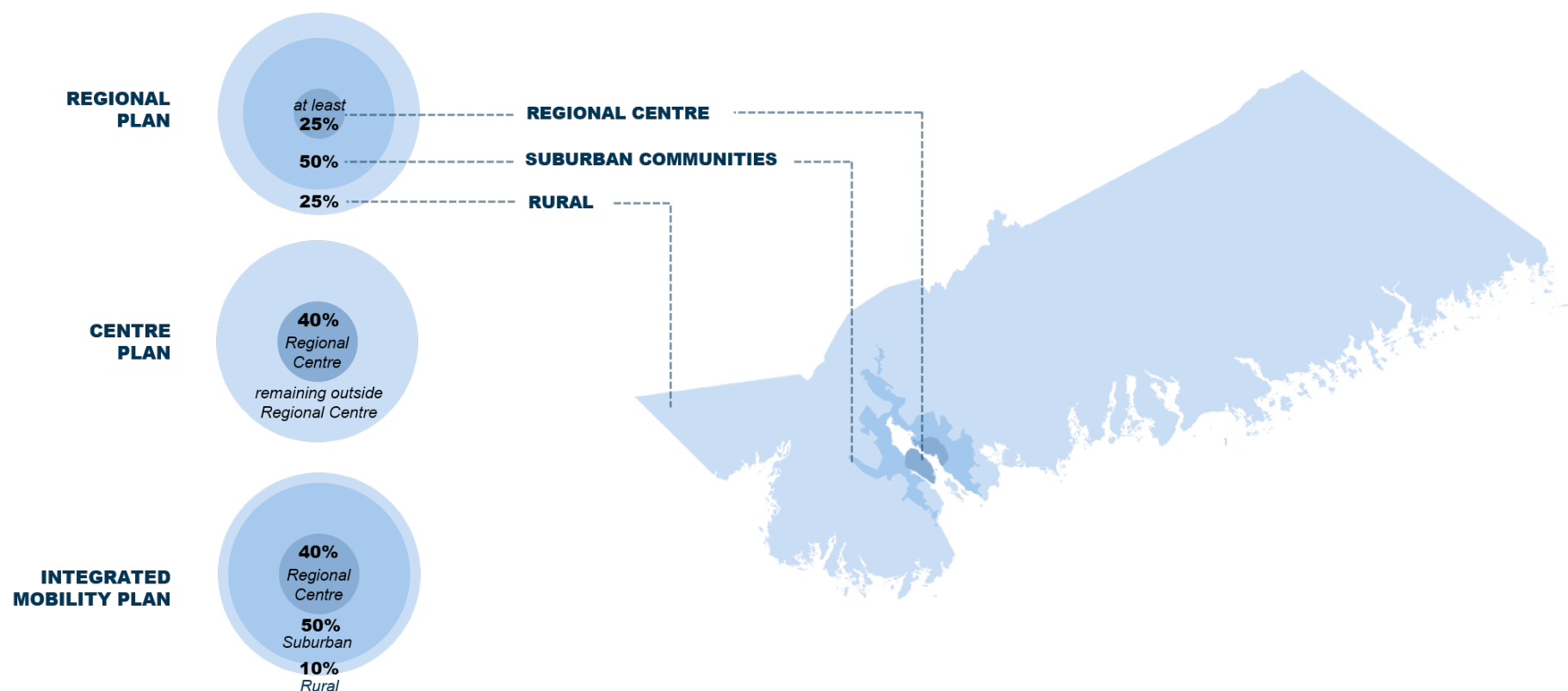
The Regional Centre Plan has followed this direction and allows significant growth to occur in the Regional Centre (Halifax Peninsula and Dartmouth inside the Circumferential Highway); enabling approximately 40% of total projected household growth (greater than the minimum of 25% identified in the Regional Plan). The Integrated Mobility Plan identified that to support the Municipality's mobility goals, it will be important to allocate as much as 90% of growth to the Regional Centre and suburban communities and identifies that 40% of total household growth be directed to the Regional Centre and 50% to suburban communities.

POPULATION ESTIMATES

In preparation for the first Regional Plan, HRM contracted Altus Group to produce population, employment, and housing projections under high, baseline, and low growth scenarios. Their 2004 report outlined the magnitude of expected growth, as well as suggested a possible pattern of growth between rural, suburban, and urban sub-areas. In advance of the first 2014 Regional Plan update, Altus Group was contracted again to update the 2004 report. In addition to newer Census data, the analysis was informed by a drastically different economic outlook arising from the global recession of 2008/2009.

Subsequent studies commissioned by HRM that have required growth forecasts as an input have tended to use the 2009 Altus report as a base, often with some modifications based on more recent observed trends. This has included the 2013 Stantec Study and the 2015 Housing Needs Assessment. The Stantec Study summarized the economic and environmental effects of four alternative growth scenarios on public and private services within the region and provided employment, population, and housing estimates for the period 2011-2031.

Figure 1: Growth Targets



DEMOGRAPHICS

The most significant demographic trend in Halifax in recent years has been the total growth in population, largely due to increased immigration. The overall demographic composition of the population by age group has not changed significantly during the life of the Regional Plan (2006 to present), although there has been a noticeable increase in the population of older adults (65+), as well as

an increase in the number and proportion of people aged 25-34.

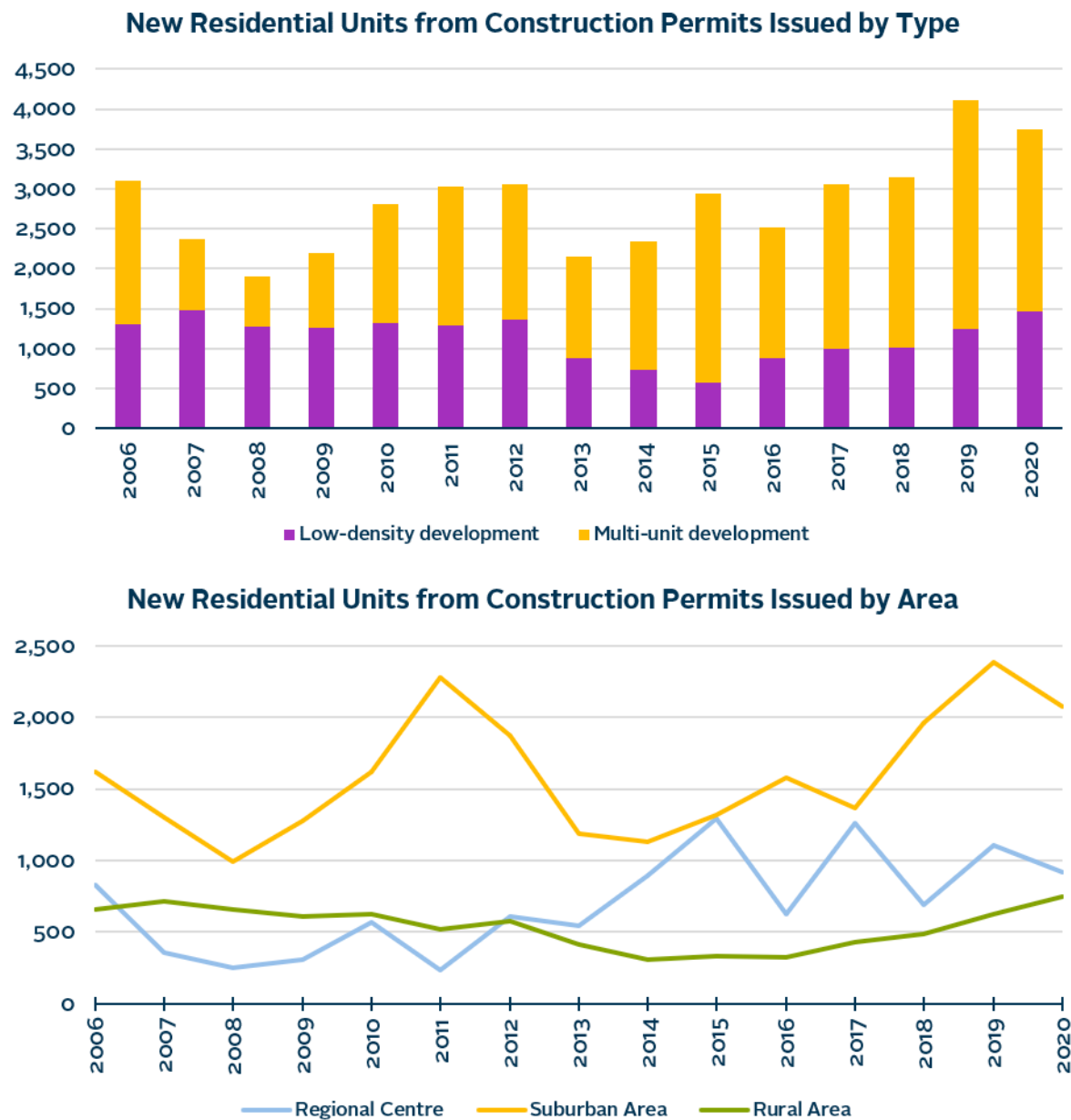
The average household size in Halifax has decreased slightly from 2.4 persons per household in 2006 to 2.3 persons per household in 2016. This is in line with a broader trend across other jurisdictions of moving toward smaller households. In Halifax, the household

size is lowest in the Regional Centre, where there tend to be smaller families and more people living alone, and highest in the rural areas of the municipality.

HOUSING ACTIVITY (2006 TO 2020)

Since 2006, there has been an overall increase in the annual new housing units, although the annual number has varied widely. Annual new unit counts were as low as about 1,900 in 2008 and as high as about 4,100 in 2019. Since 2006, the majority of new units have been in the suburban areas. While lower-density residential development made up the majority of new units for the period from 2007 to 2009, for most of the last fifteen years, most new housing units across the region have been in multi-unit apartment buildings. However, the unit type does vary by subregion: in the Regional Centre, the vast majority of new units are in higher-density forms, while in the rural areas, almost all new units are ground-based. The suburbs have more of a mix of unit types, but the majority (about two-thirds on average) have been multi-unit development.

Figure 2: Historic Housing Activity



HOUSING CONDITIONS TODAY

Recent population estimates from Statistics Canada demonstrate a trend of higher population growth than expected. HRM has seen population growth surpassing 1% annually in the last few years, rising to approximately 2% each year since 2017. Halifax has seen a 19% increase in housing prices in 2020 when compared to 2019, and further, buyers have been looking for homes with more space since the onset of the pandemic. Homes of 2,500 square feet and above had a year-over-year sales growth of 158%.¹ In March 2021, CMHC elevated its assessment of the vulnerability of Halifax's housing market from moderate to high, due to price acceleration and housing overvaluation.² Housing prices are moving beyond what is considered affordable for current residents.³

With the onset of the COVID-19 pandemic, it is too soon to tell if there will be lasting impacts on regional population growth. Despite the pandemic, positive net interprovincial migration continued during 2020, in part due to Halifax's relatively less expensive housing costs

compared to other big cities across Canada.⁴ While the COVID-19 pandemic led to shifts in construction trends throughout the year, Halifax had an overall increase in housing starts and completions compared to 2019, according to CMHC. This increase is primarily attributed to growth in low-density residential construction.⁵ Vacancy rates increased only slightly from their historic low of 1% in 2019 to 1.9% in 2020 and overall average rent prices increased by 4.1%.⁶

As the Regional Plan provides direction on where growth should occur, how much growth should be accommodated, what form of housing and community development is most appropriate, and supports efforts to create affordable housing, the Regional Plan Review is considering and monitoring the following trends noted in 2020:

- Net in-migration continuing despite the pandemic;
- Impacts of the pandemic on residents' employment and income levels;
- Reduction of existing, more affordable building stock to generate new units;
- Secondary-market development, including secondary suites and shared housing regulations; and
- Low risk of overbuilding as the absorption rate of newly completed homeowner units is at 83%.⁷

¹ [CMHC Housing Market Assessment, March 2021](#)

² Price acceleration is signaled when the growth rate of house prices exhibits an upward trend. Overvaluation indicates that house prices are elevated compared to price levels supported by personal disposable income, population, interest rates, and other housing market fundamentals. (CMHC)

³ [CMHC Housing Market Assessment, December 2020](#)

⁴ [CMHC Housing Market Assessment, December 2020](#)

⁵ [CMHC Housing Starts, Completions and Units Under Construction \(Cumulative\)](#)

⁶ [CMHC Rental Market Report 2020](#)

⁷ [CMHC Housing Market Assessment, March 2021](#)

HOUSING CAPACITY TODAY

As the housing market currently faces significant pressures, this issue paper also assesses what type of housing can be realized quickly, today, under the existing regulatory regime. For this purpose, we identified areas where housing could be built today without any changes to policy or land use regulations. There are additional opportunities outside of these key locations; however, the focus of this analysis was on larger areas that could accommodate a significant supply of housing. The **key locations** are:

- Lands in the **Regional Centre Package A** areas (Downtown, Centre, Corridor, Higher Order and Future Growth Node Designations, where policy and regulations are already in place) and Downtown Halifax
- **Suburban Vacant Land** (Vacant parcels zoned for residential use which do not coincide with ‘approved development’ below)
- Development that is **approved, but not yet built** (Areas with approved Development Agreements for 50 units or more, plus Subdivisions that have been approved but not yet fully developed outside of the Regional Centre Package A areas)

Table 1 provides an overview of the estimated

total number of dwelling units that may be accommodated, by housing type, within the key locations, the number of units that exist in those areas today, as well as current approved development that remains to be built. (Further

detail on the methodology used to determine the dwelling unit capacity is outlined in the Housing Projection Methodology section).

Table 1: Current Estimated Housing Capacity (2021)

KEY LOCATIONS	ITEM	TOTAL DWELLING UNITS (ALL TYPES)	GROUND BASED UNITS*	APARTMENT UNITS
Regional Centre Package A (including Future Growth Nodes with existing policy), Downtown Halifax, and Suburban Vacant Land	Estimated Total Dwelling Unit Capacity (based on residential density assumptions)	93,000	13,900	79,100
	Existing Units	(31,700)	(2,300)	(29,400)
	Net New Units that can be accommodated	61,300	11,600	49,700
Outside the above areas	Approximate number of approved units not yet built	23,800	8,000	15,800
Total of Key Locations	Approximate additional residential units that can be accommodated	85,100	19,600	65,500

*includes single detached, semi-detached/duplex, and townhouse dwellings

These results show us that there is capacity within the current regulatory regime to support new growth, both for ground-based and apartment-type units. In many instances, the housing identified in this table is already permitted as-of-right, meaning the approvals process to bring this housing online is the shortest and most efficient approval process available.

While many new apartment units could be built today in these areas identified for intensification, there is existing housing in these locations. This exercise has considered these “existing units” that currently house people and are therefore not contributing to the additional new units that could be physically accommodated. When existing stock is torn down or renovated, this can result in displacement of occupants during construction, who may not be able to afford new rents once construction is complete. The above capacity figures do not include the potential for secondary market housing such as secondary suites. As secondary suites are built, this could offer opportunities for more affordable housing.

While the Municipality continues to work on meeting immediate housing needs, the work presented in this Issue Paper has focused more on meeting the requirements of the next 10 years and the following 30 years. This work will help inform our planning for future

infrastructure, ensure that a sufficient supply of housing can be built in the medium and long-term, and aims to anticipate and mitigate future housing supply challenges. The work will be used to assess our growth management targets, overall settlement policy direction, and inform additional analysis such as for the Integrated Mobility Plan’s mobility targets.

HOUSING PROJECTION METHODOLOGY

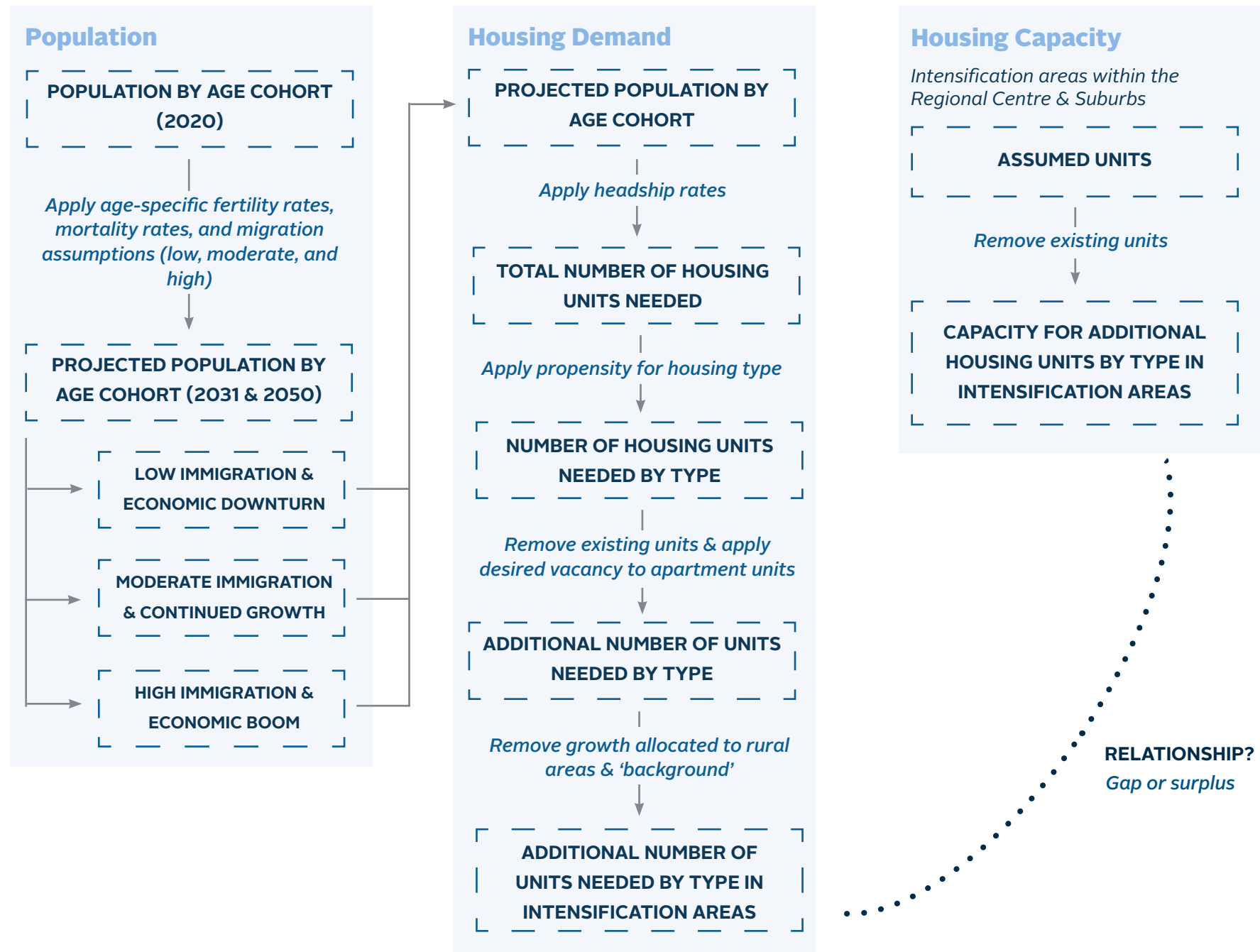
This section provides an overview of the methodology used to assess the dynamic between anticipated demand for housing and Halifax’s land use capacity to accommodate residents in different housing types. The components of this analysis included:

- **Population Projections:** Low, moderate and high growth population projections were developed. By using three different projection scenarios, we can test how well-positioned our policy and regulations are to respond to growth and change in our population over time.
- **Time-Horizon:** The population was projected to two points in time: 2031 (time-horizon of the current Regional Plan) and 2050 (expected time-horizon of the next Regional Plan).
- **Housing Demand:** The likelihood of different age groups to live in households of

different sizes was assessed based on 2016 Census data. By considering the propensity of the current population to choose certain types of housing, we can also test how well-positioned our policy and regulations to respond to increased housing demand over time.

- **Housing Capacity:** Physical locations in the region were identified for housing growth under Regional Plan policy, the Regional Centre Plan, and ongoing policy work, such as the Integrated Mobility Plan. The capacity of these areas has been assessed by assuming densities and calculating the number of units that might be built on the land to provide a rough estimate of the anticipated development.

Figure 3: Housing Projection Methodology



POPULATION PROJECTION

What is the future population we are planning for and what is their demographic profile?

As the projections used in the current Regional Plan are approximately a decade old, a new set of population projections has been generated. Since 2014 economic conditions have shifted, migration patterns have changed, and new census information has been released.

In keeping with previous approaches, a Cohort Survival Model was used to project the population, but new assumptions have been created to reflect current conditions. The model starts with Statistics Canada's 2020 population estimate for the Halifax Census Metropolitan Area, and projects the components of population change (birth, death, and migration), by age and sex, out to the year 2050. It uses the average age-specific fertility and mortality rates from Statistics Canada data for the years 2016 to 2019. If population growth relies entirely on natural population change, with no migration in or out of HRM, the population would peak in 2028 and then begin to decline significantly. Population growth in Halifax is dependent on continued immigration, interprovincial and intraprovincial migration to the region.

Migration Patterns

In developing our migration assumptions, we analyzed each component of migration separately, because they each are driven by different factors: international immigration is largely controlled by Federal and Provincial government policy, while inter- and intra-provincial migration are more affected by economic conditions and employment opportunity in HRM relative to the rest of Canada and Nova Scotia. Migration is the most difficult component of population change to predict, because it is so responsive to factors that can change quickly and unpredictably – like the government of the day, or a recession caused by a global pandemic.

Looking back at the last 15 years of migration data for HRM, there have been noticeable shifts in the trends. One example is a net loss of residents to other provinces around 2011 to 2014, switching to a net gain in residents from other provinces after 2015.

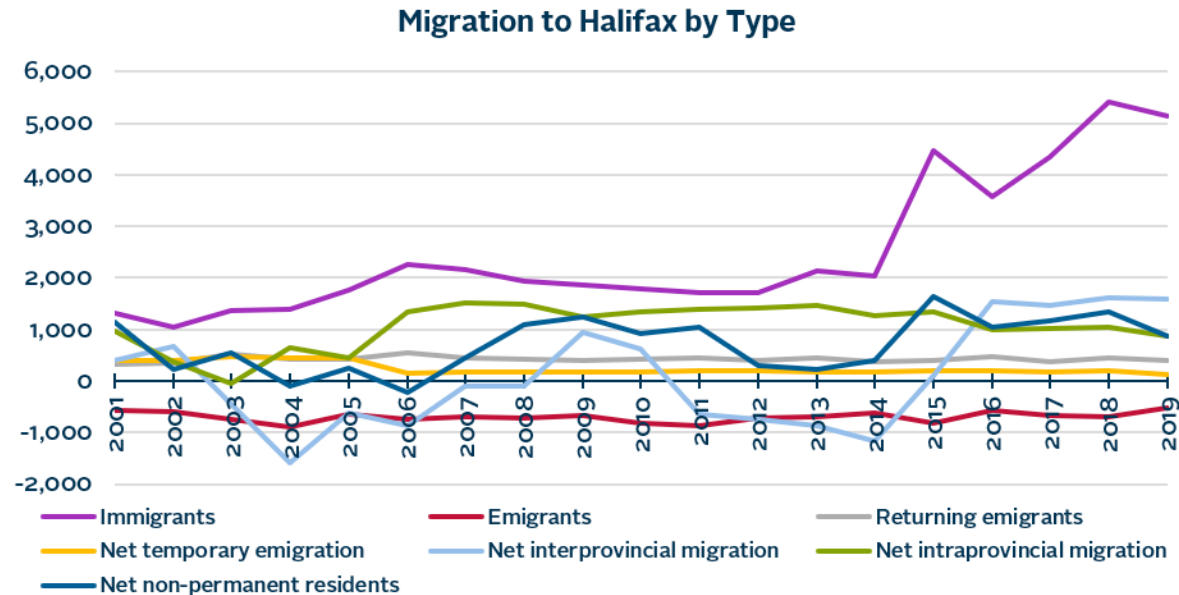
Since we have no way of knowing what economic or societal shifts will occur in the future, nor when they will occur, our baseline assumptions for most components of migration are based on the averages from 2016 to 2019, when the number of most types of migrants was relatively consistent.

Immigration is the only component where our assumptions were driven by another source; we used Statistics Canada's population projections, which were developed for all provinces using historical data and a survey of demographic experts.⁸ We calculated the average percentage of immigrants to Nova Scotia that came to live in Halifax over the last four years, and applied that percentage to Statistics Canada's projected future immigration for Nova Scotia as a whole.

By altering the migration assumptions, we envisioned three possible future population projection scenarios. Each scenario was projected to two points in time: 2031 (Time-Horizon of the current Regional Plan) and 2050 (Time-horizon of the next Regional Plan). By using three projections at two points in time, we can test how well-positioned our policy and regulations are to respond to growth and change in our population over time. The scenarios are:

⁸ [Statistics Canada, Population Projections for Canada \(2018 to 2068\), Provinces and Territories \(2018 to 2043\)](#)

Figure 4: Historic Migration Trends



Source: Statistics Canada, Components of population change by census metropolitan area and census agglomeration, 2016 boundaries ([Table 17-10-0136-01](#))

- **Low Immigration & Economic Downturn:** This scenario uses Statistics Canada's Low Immigration scenario, a net negative interprovincial migration at the average level observed from 2011-2014, and net neutral intraprovincial migration (no more people coming into Halifax from elsewhere in Nova Scotia than are leaving for other parts of the province).
- **Moderate Immigration & Continued Growth:** This scenario uses Statistics Canada's Medium Immigration scenario,

and the averages from 2016-2019 for other components of migration. This scenario is referenced as "moderate", and it most closely reflects recent trends and anticipated growth patterns.

- **High Immigration & Economic Boom:** This scenario uses Statistics Canada's High Immigration scenario, and adjustments were made to inter- and intra-provincial migration of the same amount above the Moderate scenario as the Low scenario was below the Moderate scenario.

Projection Results

The results of the three population projection scenarios are shown in Table 2 below, for the years 2031 and 2050. Figure 5 shows the three population projection scenarios completed for this analysis compared to the projection included in the 2014 Regional Plan. Figure 6 shows the projection scenarios distributed by age and sex, compared to today (2020).

Table 2: Projected Population

PROJECTION SCENARIO	2031	2050
Low Immigration & Economic Downturn	501,000	537,800
Moderate Immigration & Continued Growth	554,000	714,500
High Immigration & Economic Boom	611,300	943,000
Note: Statistics Canada estimated Halifax's population as 448,544 in 2020.		

Figure 5: Population Projection Scenarios

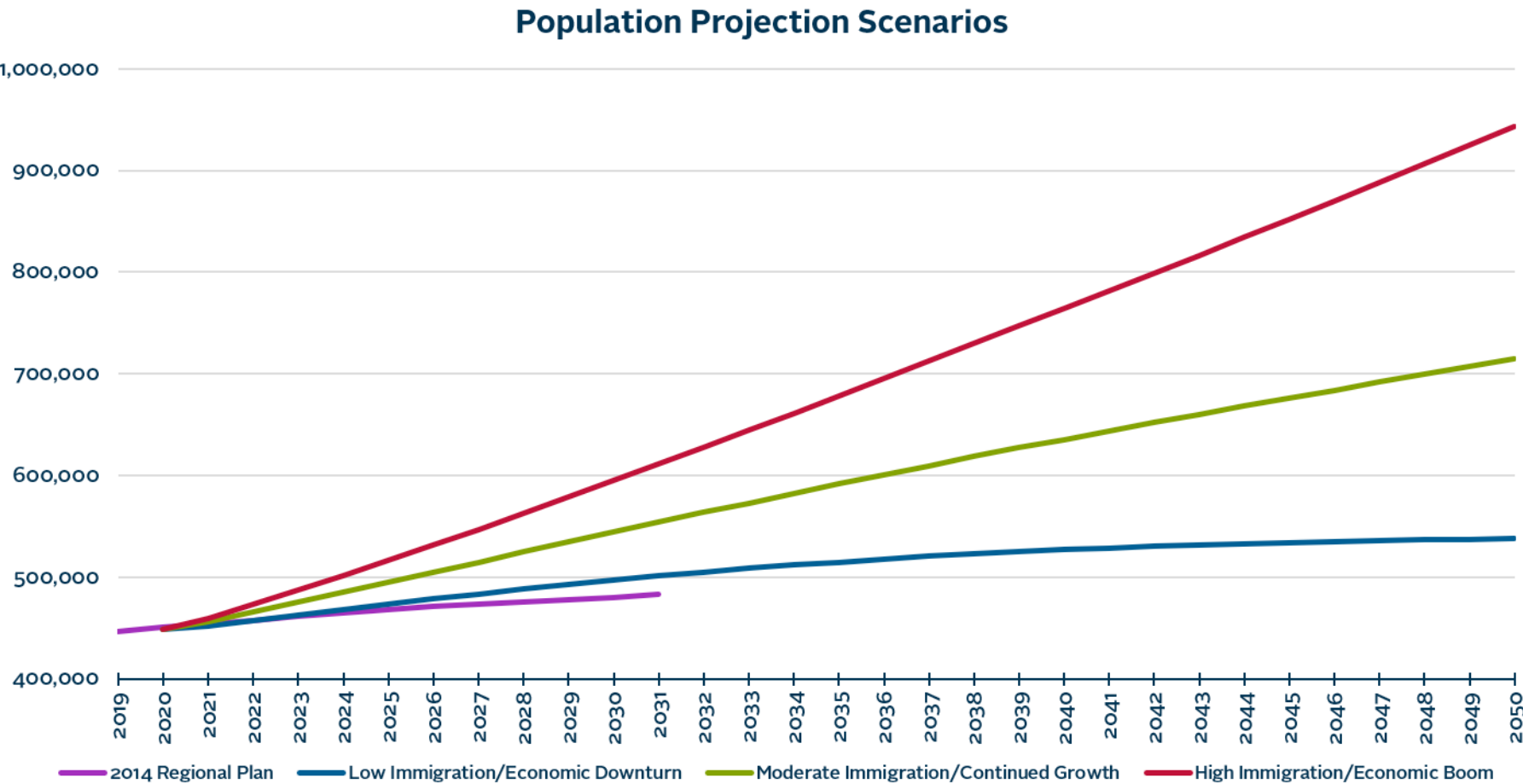
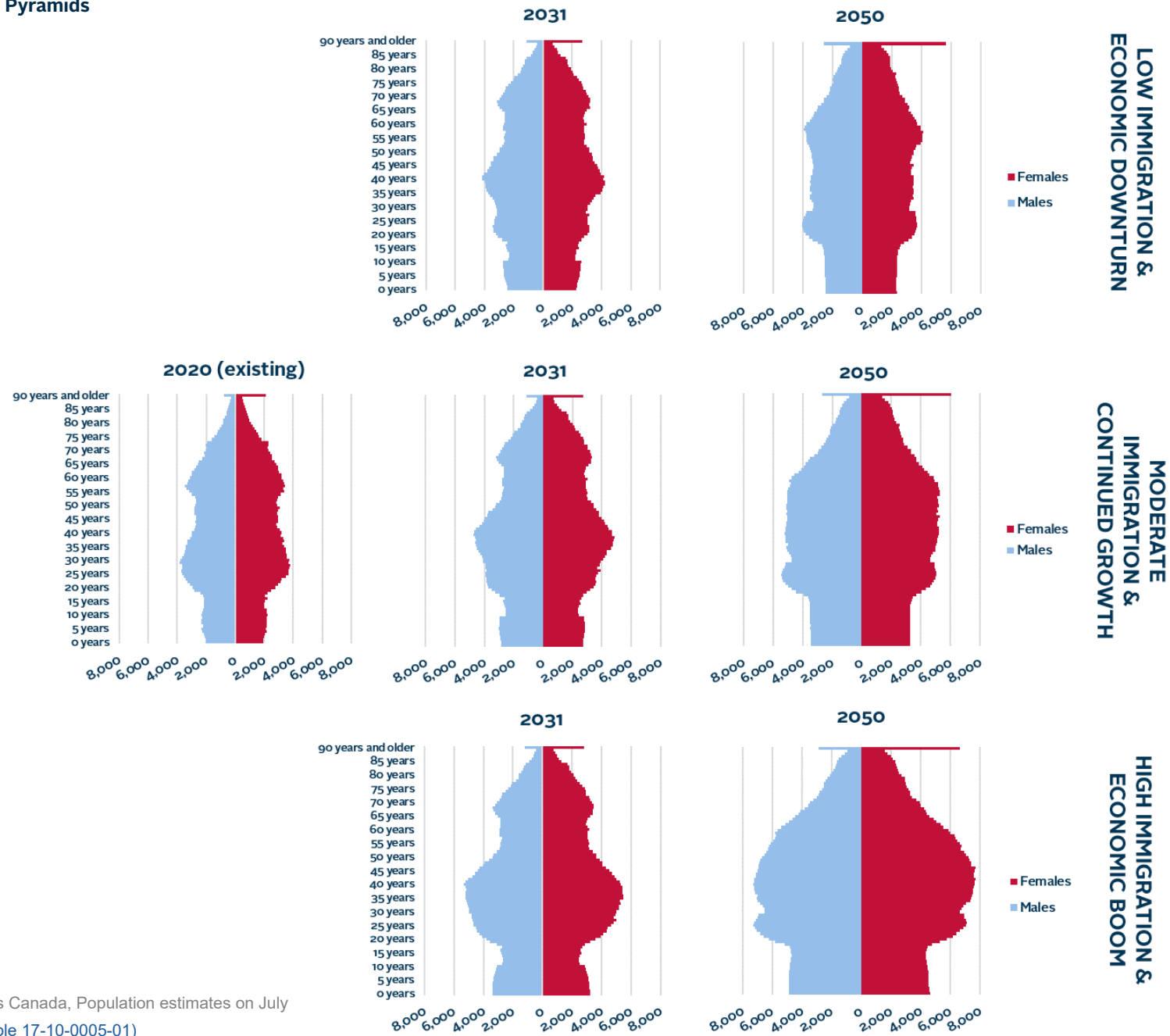


Figure 6: Population Pyramids



Source (2020): Statistics Canada, Population estimates on July 1st, by age and sex ([Table 17-10-0005-01](#))

HOUSING DEMAND

What will be the total demand for housing in the years 2031 and 2050 based on the population projection scenarios? Based on the propensity of the current population to choose different types of housing, what will be the demand for different types of housing in 2031?

To understand the demand for future housing, we determined the projected number of households and made assumptions about the type of housing that those households would prefer.

The projected number of households was determined by applying a headship rate to the projected population by age group. The headship rate is an indicator of household formation behavior at different life stages – it allows us to see the ages at which people are likely to head a household or share accommodation. The headship rate represents the proportion of a given five-year age cohort that are primary household maintainers. For this projection, we used headship rates based on the 2016 Census. In the most recent Census periods, headship rates have remained relatively stable, apart from those for certain younger age groups.⁹

Applying a headship rate to the projected population provides the potential number of households in each five-year age group. As each household requires one housing unit, the assumption is that the total number of projected households represents the total

demand for housing.¹⁰ We projected the total demand for housing in 2031 and 2050 for each population projection scenario (Low Immigration/Economic Downturn, Moderate Immigration/Continued Growth and High Immigration/Economic Boom).

To understand the demand for housing by different housing types, we can estimate housing preference by generating a “propensity” for the households to choose certain types of housing, in this case, ground-based housing (which includes single-detached, semi-detached/duplex, town/rowhouses, and mobile homes) or apartment housing (all other types, including condos in multi-unit buildings). Using 2016 Census data, dwelling unit propensity was determined by dividing the number of primary household maintainers in each age cohort living in each

housing type by the total number of primary household maintainers in that same age cohort. This generated a rate of propensity which was then applied to future years.

This method assumes that households in 2016 were living in their preferred housing type, and that this propensity will continue. It is likely that housing type preferences will change as the dwelling types in the housing supply change over time. Once the projected total housing demand was generated, we increased the demand for apartment units by 3% to factor in a desired 3% vacancy rate, and removed the demand associated with the residential units we already have.

We also assumed that there would be demand for units outside of the areas identified for future housing capacity. For both the Regional Centre and Suburban Areas, we assumed that 10% of total demand would be realized outside of the primary intensification areas. This was based on permit data analysis from the past 10 years and might be considered a conservative number. Once these values were accounted for, it left us with the total number of units we expect to direct to the intensification areas, based on the future population demand.

⁹ [CMHC Housing Market Insight: Household Projections, 2020](#)

¹⁰ Everyone captured in Statistics Canada’s annual population estimates contributes to the demand for housing units in this method, including the population living in collective housing (e.g. nursing homes, correctional facilities, etc.). However, since Statistics Canada estimates population for July 1st, post-secondary students who return to other locations over the summer are likely not included. Further, people without a permanent address may not be fully captured, although Statistics Canada adjusts for the net undercoverage of the census.

HOUSING CAPACITY

What locations have been identified to accommodate future housing demand and development growth and how much capacity do these areas have?

There are several locations within the Municipality that have been identified for possible residential intensification. Some of these areas have already been designated and zoned for growth and could therefore be developed immediately, while other areas have Regional Policy direction or strategic direction

from Regional Council to consider them as growth areas for the future.

To assess how much housing capacity is available in these areas, staff assigned densities within each land use designation identified for potential residential intensification. These density assumptions are based on analysis of

existing densities within the Municipality, the Pattern Book, previous work for the Rapid Transit Strategy, and professional expertise. The densities were applied to the amount of land area in each designation (minus the road right-of-way) to obtain a total assumed number of units.

Figure 7: Potential Timeline for Development of Intensification Areas

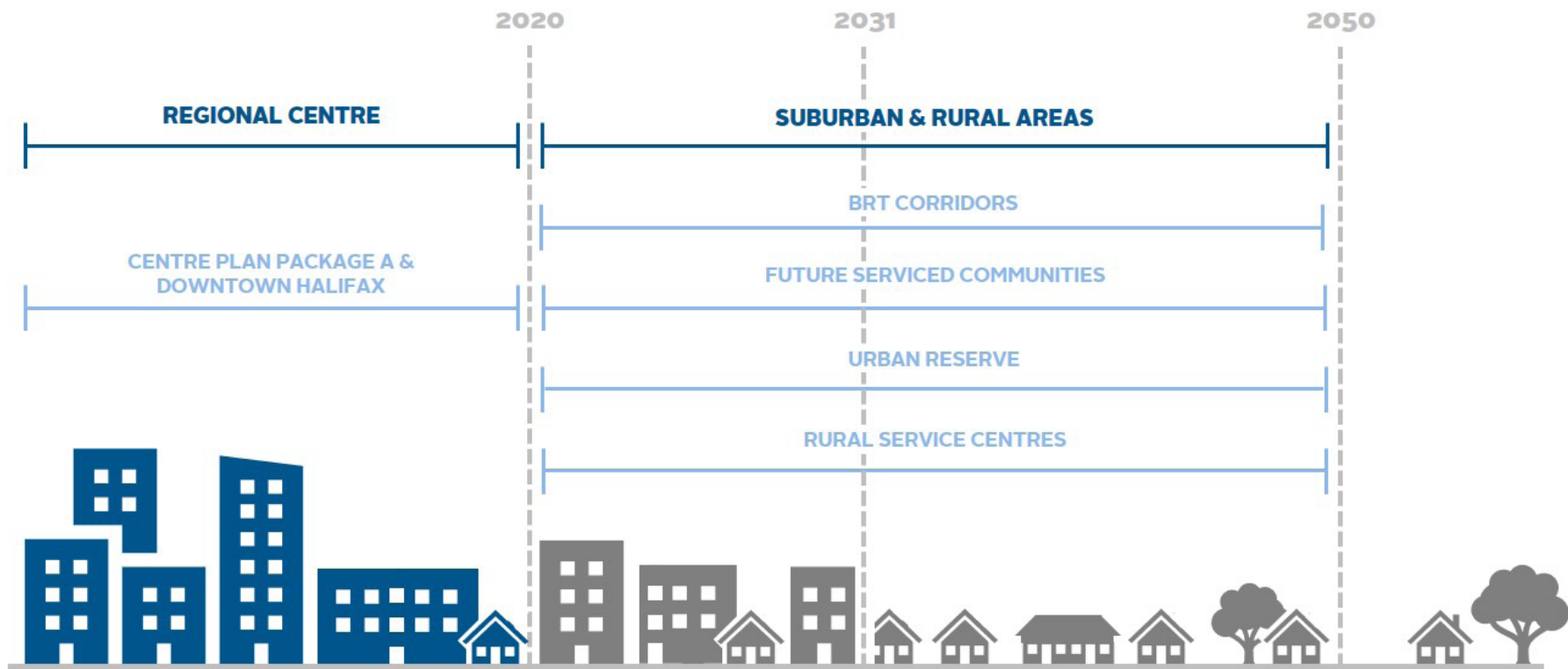


Table 3: Areas Assigned Capacity for Residential Intensification

AREA	DESCRIPTION OF RESIDENTIAL INTENSIFICATION AREAS	SOURCE POLICY
REGIONAL CENTRE	• Downtowns: Downtown Halifax and Downtown Dartmouth are major growth areas where the most intense mix of uses in the Municipality and larger scale developments are supported, while also respecting the local heritage context and transitions to surrounding low-rise neighbourhoods • Centres: These are concentrated nodes of commercial and mixed-use developments along major streets, where major growth areas is expected, including mid-rise and tall buildings. Includes: Gottingen Street; Highfield Park Drive; Quinpool Road; Robie Street and Young Street; Spring Garden Road; Wyse Road • Corridors: These include commercial and community nodes on major streets with established or emerging commercial uses, and typically abut low-rise neighbourhoods in the rear yards. Includes portions of: Agricola Street; Barrington Street – Inglis Street; Chebucto Road; Gottingen Street – Isleville Street – Young Street; Oxford Street – Bayers Road; Pleasant Street; Portland Street; Prince Albert Road – Braemar Drive; Queen Street; Quinpool Road; Robie Street – Cunard Street; Victoria Road – Primrose Street; Windmill Road; Windsor Street; Wyse Road • Higher Order Residential: Applied to lands where low-rise to tall residential buildings are permitted, with limited commercial opportunities. Includes neighbourhoods as well as some individual properties characterized by a concentration of multi-unit dwelling residential buildings • Future Growth Nodes: These are larger commercial, industrial, vacant or otherwise underutilized lands where significant mixed-use growth will be accommodated in the future. While neighbourhood planning has been completed for some of the Future Growth Nodes, others will require detailed planning to develop policy for developing complete communities with sufficient infrastructure, including access to transit, active transportation routes, roads and open spaces. Includes Future Growth Nodes with existing policy: Shannon Park Lands; Penhorn Lands; Young Street Lands; Dartmouth Cove. Future Growth Nodes without existing policy: Halifax Shopping Centre Lands; Joseph Howe Rail Lands; Kempt Road Lands; Strawberry Hill Lands; Mic Mac Mall Lands; West End Mall Lands.	Centre Plan Package A
SUBURBAN AREAS	• Future Serviced Communities: These include lands identified as growth centres within the Urban Settlement designation. Includes: Sandy Lake (north of Hammonds Plains Road); Highway 102 West Corridor (Urban Settlement Lands Only); Morris Lake Expansion (including northern lands); Port Wallace	Regional Plan & Rapid Transit Strategy

AREA	DESCRIPTION OF RESIDENTIAL INTENSIFICATION AREAS	SOURCE POLICY
SUBURBAN AREAS (CONT.)	The Rapid Transit Corridors: These include lands within an 800 m walkshed of streets identified with a future BRT route, including Dunbrack Street, Lacewood Drive, Herring Cove Road, Portland Street, and Commodore Drive. Within the walksheds, properties were assigned a designation, similar to those in the Regional Centre Plan described above (Centre, Corridor, Higher-Order Residential, or Future Growth Node) The Urban Reserve designation identified lands that are expected to be serviced beyond the Regional Plan's 25-year horizon (after 2031) This Includes: Lands on Hwy 7, Westphal; land surrounding Anderson Lake area (Dartmouth/Bedford); Governor Lake North (Timberlea); Kidston Lake lands (Spryfield/Herring Cove); private lands in the Blue Mountain - Birch Cove Lakes Regional Park area.	Regional Plan & Rapid Transit Strategy
RURAL AREAS	As expressed in Figure 3 and outlined in the scenario explanations below, a percentage of total housing demand was assigned to the rural areas of the municipality in keeping with regional growth targets.	Regional Plan

HOUSING SCENARIOS

How can the future population and housing growth be accommodated within the areas that have been planned for residential growth?

To explore how the Municipality plans to grow and how that relates to future housing demand, three land use scenarios have been generated. In these scenarios, we split the total demand for new housing between the Regional Centre, Suburban Areas, and Rural Areas, and assign which specific locations within those larger areas would be intensified (choosing locations from Table 3). This is a first step in assessing current and future housing policy in Halifax.

- The first scenario assesses the **2014 growth targets**, Future Serviced Communities, and Regional Centre Package A lands. It assumes 25% of growth in Rural Communities and

75% in Urban Communities. This shows us how much supply is enabled today relative to the Regional Plan growth targets as they exist today.

- The second scenario assesses the impact of the **Integrated Mobility Plan**, and its suggestion that the municipality further enhance these growth targets to 90% growth inside the Urban Communities, and 10% growth to Rural Communities. It also assumes growth in areas within 800m of the Rapid Transit Corridors, as was generated in the Rapid Transit Strategy.
- The third scenario assesses the impact of the **long-range plan for growth** as

contained within the Regional Plan, layered with recent policy direction centred on mobility and the IMP. This scenario has essentially the same parameters as the second scenario, with the Urban Reserve areas factored in as these areas are set up to be future growth areas in the current Regional Plan.

Over the next few months, the Municipality will use this information to assess the flexibility of current regulations to respond to near term (2031) and longer term (2050) housing demand. It will also be used to assess the ongoing growth management targets, mobility targets, and ongoing supply of serviced land.

SCENARIO A: 2014 REGIONAL PLAN

Growth Targets:	Regional Plan (25% Rural, 75% Urban Communities)
Primary Areas for Growth:	Regional Centre, Future Serviced Communities

Background

In 2014, the Municipality was still planning for 1% annual growth, and analysis revealed that the Regional Plan's growth targets (25% of growth to the Regional Centre, 50% to the Suburbs, and 25% to Rural Areas) were not being met. Meanwhile, the Stantec Scenarios study indicated that achieving the Regional Plan Growth targets would be critical for the Municipality in terms of infrastructure cost savings, and found that it would be beneficial to concentrate even more growth in the Regional Centre than the initial growth targets called for. Therefore, the 2014 Regional Plan took the direction of further concentrating growth in the Regional Centre, and identified Future Serviced Communities that could be brought online in the Suburban Areas. The growth targets became: 75% of growth to the Urban Communities and 25% to Rural areas, with at least 25% of the urban growth going to the Regional Centre. In 2019, the Municipality approved Centre Plan Package A, which could accommodate 40% of growth in the Regional Centre in key areas for intensification.

What is it?

This land use scenario explores growth allocation according to the 2014 Regional Plan, with 25% of total growth going to Rural Areas, and intensification occurring in the Regional Centre Plan Package A lands, as well as the Future Serviced Communities.

Figure 8: Scenario A >>>

SCENARIO A 2014 Regional Plan

Growth Area

- Centre
- Corridor
- Higher-Order Residential
- Downtown
- Future Growth Node
- Future Served Community
- Remaining Approved Development
- Sub-Area Boundary

SUBURBAN AREA

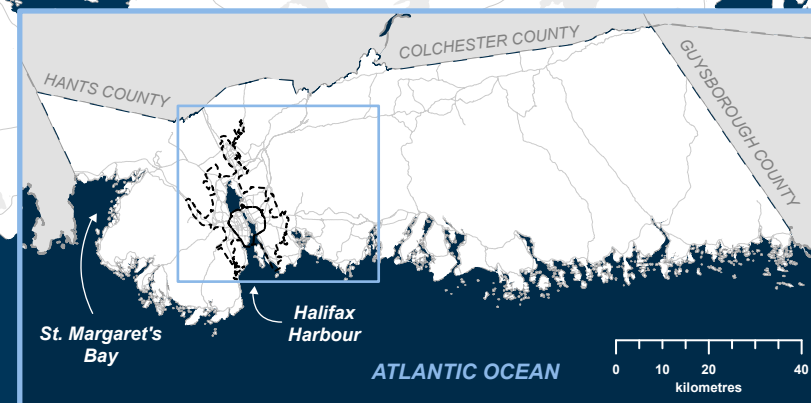
REGIONAL CENTRE

PCS: NAD 1983 CSRS 2010 MTM 5 Nova Scotia
Datum: North American 1983 CSRS
Projection: Transverse Mercator
Central Meridian: -64.5000
Latitude of Origin: 0.0000
Longitude of Origin: 0.0000
False Easting: 25,500,000.0000
False Northing: 0.0000
Scale Factor: 0.9999
Map Units: Metre

Map created by Halifax Regional Municipality Research & Data Group.

The following is a graphical representation and although care has been taken to ensure the best possible quality, HRM does not guarantee the accuracy of this document.

0 1 2 4
kilometres



0 10 20 40
kilometres

SCENARIO B: THE NEXT 10 YEARS

Growth Targets:	Integrated Mobility Plan (10% Rural, 50% Suburban, 40% Regional Centre)
Primary Areas for Growth:	Regional Centre, Future Serviced Communities , Rapid Transit Corridors

Background

Following the 2014 Regional Plan and the Centre Plan, the Municipality began further assessing growth as it relates to mobility. The Integrated Mobility Plan (2017) assessed the mode share targets and suggested that in order to meet them, as much of 90% of growth should be accommodated within the urban settlement or service boundary. It proposed new regional growth targets of approximately 40% of growth in the Regional Centre, 50% in Suburban communities, and 10% in Rural communities. The Rapid Transit Strategy (2020) was the next step in assessing how this growth could be organized in the suburban communities around proposed Bus Rapid Transit (BRT) routes, and assessed how much development could be realized within 800m of these routes.

What is it?

The primary difference between this scenario and Scenario A, is that by using the IMP growth targets, Scenario B allocates 10% of growth to the Rural Areas, as opposed to 25%. There is also additional capacity available in this scenario, as certain areas within 800m of the BRT routes are identified for residential intensification.

Figure 9: Scenario B >>>

SCENARIO B

The Next 10 Years

Growth Area

- Centre
- Corridor
- Higher-Order Residential
- Downtown
- Future Growth Node
- BRT Walkshed
- FutureServedCommunities
- Remaining Approved Development
- Sub-Area Boundary

BRT: Bus Rapid Transit

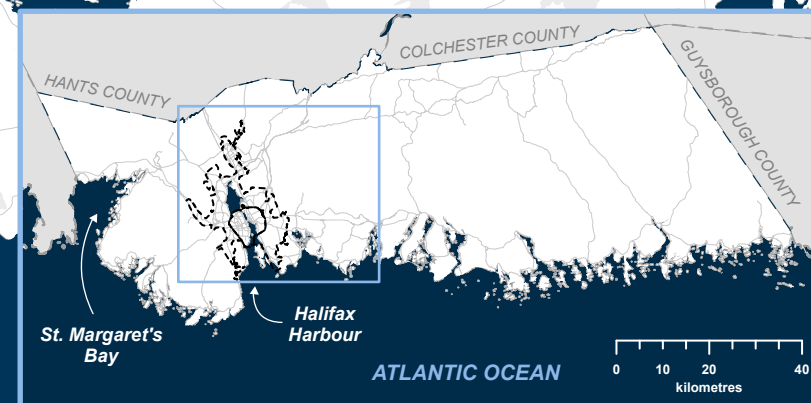
SUBURBAN AREA

REGIONAL CENTRE

PCS: NAD 1983 CSRS 2010 MTM 5 Nova Scotia
 Datum: North American 1983 CSRS
 Projection: Transverse Mercator
 Central Meridian: -64.5000
 Latitude of Origin: 0.0000
 Longitude of Origin: 0.0000
 False Easting: 25,500,000.0000
 False Northing: 0.0000
 Scale Factor: 0.9999
 Map Units: Metre

Map created by Halifax Regional Municipality Research & Data Group.

The following is a graphical representation and although care has been taken to ensure the best possible quality, HRM does not guarantee the accuracy of this document.



SCENARIO C: THE FUTURE

Growth Targets:	Integrated Mobility Plan (10% Rural, 50% Suburban, 40% Regional Centre)
Primary Areas for Growth:	Regional Centre, Future Serviced Communities , Rapid Transit Corridors, Urban Reserve

Background

This scenario seeks to examine longer-range outcomes, by assuming that the Municipality continues with the policy direction for growth allocation from the Integrated Mobility Plan and by bringing on the lands currently designated ‘Urban Reserve’ as part of the capacity. The Regional Plan Review will consider if adjustments to the Urban Reserve areas are necessary where circumstances may have changed since the Plan was last reviewed in 2014, and will set policy intent to study additional scenarios for future settlement.

Due to the long-range nature of this scenario, it was only evaluated on the 2050 time horizon.

What is it?

This scenario builds on Scenario B, and allocates additional growth to the areas currently designated ‘Urban Reserve’, for the 2050 time horizon only.

Figure 10: Scenario C >>>

SCENARIO C The Future

Growth Area

- Centre
- Corridor
- Higher-Order Residential
- Downtown
- Future Growth Node
- BRT Walkshed
- Future Served Community
- Urban Reserve
- Remaining Approved Development
- Sub-Area Boundary

BRT: Bus Rapid Transit

SUBURBAN AREA

REGIONAL CENTRE

PCS: NAD 1983 CSRS 2010 MTM 5 Nova Scotia
 Datum: North American 1983 CSRS
 Projection: Transverse Mercator
 Central Meridian: -64.5000
 Latitude of Origin: 0.0000
 Longitude of Origin: 0.0000
 False Easting: 25,500,000.0000
 False Northing: 0.0000
 Scale Factor: 0.9999
 Map Units: Metre

Map created by Halifax Regional Municipality Research & Data Group.

The following is a graphical representation and although care has been taken to ensure the best possible quality, HRM does not guarantee the accuracy of this document.

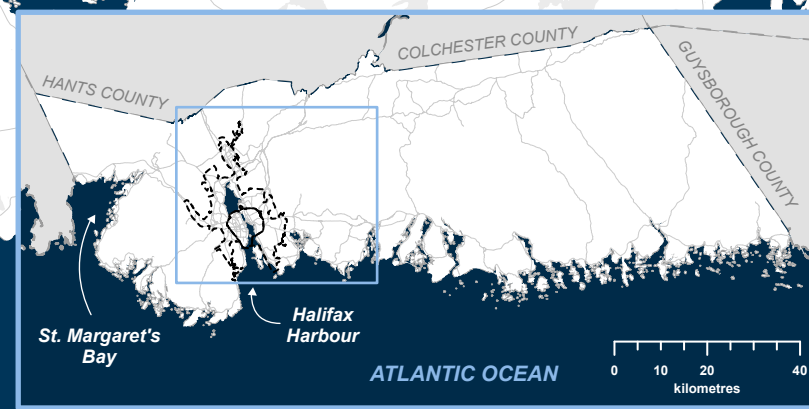


Table 4: Results

			SCENARIO A: 2014 REGIONAL PLAN	SCENARIO B: THE NEXT 10 YEARS	SCENARIO C: THE FUTURE
Growth Allocation			25% Rural 75% Urban Communities	10% Rural 50% Suburban Areas 40% Regional Centre	10% Rural 50% Suburban Areas 40% Regional Centre
Intensification Areas			Regional Centre Future Serviced Communities	Regional Centre Future Serviced Communities Rapid Transit Corridors	Regional Centre Future Serviced Communities Rapid Transit Corridors Urban Reserve
Capacity (Housing Units)			92,600  9,200  83,400	141,000  17,200  123,800	181,300  42,600  138,700
Demand Allocated to Intensification Areas	Low Immigration & Economic Downturn Demand Scenario	2031	13,000  13,000  0	15,500  15,500  0	
		2050	26,100	31,300	31,300
	Moderate Immigration & Continued Growth Demand Scenario	2031	27,900  21,300  6,600	33,500  26,300  7,200	
		2050	76,800	92,200	92,200
	High Immigration & Economic Boom Demand Scenario	2031	44,400  28,800  15,600	53,300  36,700  16,600	
		2050	141,300	169,500	169,500

 = Ground Based Units (single detached, semi-detached/duplex, townhouse)

 = Apartment Units

Due to the long time period from 2021-2050 and the uncertainty around future trends in housing propensity, we did not evaluate housing type on the 2050 time horizon.

CONCLUSION

The goal of this Issue Paper is to understand the dynamic between the projected demand for housing and Halifax's land use capacity to accommodate residents in different housing types. The analysis presented in this paper is not meant to be predictive, but instead explores a way of testing and assessing our policy, regulations and growth targets. This work will help us to understand the different ways we can create strong policy to support housing everyone today and in the future.

Evaluating different scenarios for growth allows us to consider a potential future and the resiliency of Halifax's policy. These are not decisions: the scenarios represent the direction of Regional Council's since the 2014 Regional Plan, and how they interact with changes in population and anticipated demand for housing. Many assumptions were necessary to complete this exercise, based on data and/or previous policies and analysis, and staff expertise.

Preliminary analysis of the scenarios tells us that based on the 2016 propensity of the population to live in different housing types, there continues to be high demand for ground-based units. The analysis does not assess to what extent housing propensity is driven by market availability. The initial analysis shows that there is regulatory capacity to accommodate overall population growth in the short to moderate term. Further analysis of the scenarios indicates the development of the remaining Future Serviced Communities should be considered in the near term, if Regional Council chooses to respond to 2016 propensity to live in ground-based units.

Over the next few months, the Municipality will use this information to assess the flexibility of current regulations to respond to near term (2031) and longer term (2050) housing demand. It will also be used to assess the ongoing growth management targets, mobility targets, and ongoing supply of serviced land.

Additional questions or ideas we can consider as the work progresses include:

- How should the ongoing policy work program be organized to best respond to current housing conditions?
- How might propensity (or preferences for housing) shift over time as the population changes?
- What do we anticipate the housing needs will be for key segments of the population, students, seniors, recent immigrants, and how should housing policy change to support these needs?
- Are there other growth scenarios that should be analyzed as part of the Regional Plan Review?

HAVE YOUR SAY!

Find out more about the Regional Plan Review and send us your feedback on the project webpage:

www.shapeyourcityhalifax.ca/regional-plan

Questions? Email us: regionalplan@halifax.ca

**Appendix A. New Residential Units from Construction
Permits Issued by Type**

	Total	Low-density development	Multi-unit development
2006	3,108	1,300	1,808
2007	2,375	1,480	895
2008	1,897	1,282	615
2009	2,198	1,262	936
2010	2,809	1,314	1,495
2011	3,035	1,286	1,749
2012	3,061	1,356	1,705
2013	2,147	880	1,267
2014	2,339	729	1,610
2015	2,946	572	2,374
2016	2,519	875	1,644
2017	3,060	996	2,064
2018	3,140	1,012	2,128
2019	4,112	1,239	2,873
2020	3,739	1,459	2,280

Includes new units resulting from new construction, additions, and renovations. Low-density residential development includes single-, two-, three-, and four-unit dwellings.

**Appendix B. New Residential Units from Construction
Permits Issued by Area**

	Regional Centre	Suburban Area	Rural Area
2006	829	1,622	657
2007	357	1,301	717
2008	248	992	657
2009	307	1,279	612
2010	567	1,619	623
2011	236	2,276	523
2012	613	1,874	574
2013	545	1,189	413
2014	898	1,131	310
2015	1,290	1,321	335
2016	623	1,575	321
2017	1,262	1,367	431
2018	688	1,962	490
2019	1,108	2,380	624
2020	915	2,077	747

Includes new units resulting from new construction, additions, and renovations.

Appendix C. Total Projected Housing Demand

Population Scenario		Total Units	Ground-based Units	Apartment Units
2031	Low	220,200	146,800	73,400
	Moderate	242,100	160,700	81,400
	High	266,300	175,400	90,900
2050	Low	239,400	N/A	N/A
	Moderate	313,800		
	High	408,300		

Rounded to the nearest hundred