

HALDIMAND COUNTY
POPULATION, HOUSEHOLD &
EMPLOYMENT FORECAST
UPDATE, 2011-2041

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Plaza Three
101-2000 Argentia Rd.
Mississauga, Ontario
Canada L5N 1V9

Phone: (905) 272-3600

Fax: (905) 272-3602

e-mail: info@watson-econ.ca

www.watson-econ.ca

 **Planning for growth**

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Haldimand County retained Watson & Associates Economists Ltd. in the summer of 2013 to undertake an update to the County's 2009 Population, Household and Employment Forecast prepared by Hemson Consulting Ltd. The key objectives of this study are as follows:

- To assess economic, demographic and location conditions and any implications in terms of the nature, type and demand of different types of development activity in certain parts of the County in order to ensure that the forecasts are relevant;
- To review and re-assess the distribution of the growth forecasts by urban and rural area based on recent and anticipated development trends; and
- To determine whether the use of two distribution scenarios for overall growth in Haldimand County is appropriate, and if so, which forecast is the “most likely” and should be used for growth management and strategic planning purposes, including development charges calculations.

The results of this analysis are intended to guide decision making and policy development specifically related to planning and growth management, urban land needs, municipal finance and infrastructure planning carried out for Haldimand County. More specifically, this growth forecast update will be used as background to the County's Official Plan Review (OP) and updated Development Charges (2014 DC) Background Study.

On June 17, 2013, the Ministry of Infrastructure approved Amendment 2 to the Growth Plan for the Greater Golden Horseshoe (Places to Grow). Amendment 2 extends the forecasts set out in Schedules 3 and 7 of the Growth Plan to 2041 and updates the Growth Plan forecasts for the year 2031. The primary objective of this assignment is to update the County's population, housing and employment growth allocations by urban community area and remaining rural area to 2041, in accordance with the revised figures set out in Amendment 2 to the Growth Plan.

The revised allocations, provided herein, are based on a detailed review of supply and demand factors which are anticipated to influence residential and non-residential development patterns by urban community, such as servicing constraints, active residential applications in the development process, vacant designated urban lands and proximity to employment markets within the commuter-shed.

The following provides a summary of the key findings of this report with respect to forecast population, housing and employment trends for Haldimand County.

County-wide Population and Housing Forecast

- The County's population is forecast to increase by approximately 17,300 persons over the forecast period, growing from 46,700 persons in 2011 to 64,000 in 2041. This represents an average annual population growth rate of 1.1%. Comparatively, the population for the Province of Ontario as a whole is also forecast to increase at an annual rate of 1.1%, between 2011 and 2041.
- Haldimand County's housing base is forecast to increase from approximately 16,830 in 2011 to 21,140 in 2041, an increase of 7,300 or 1.1% annually.
- Average housing occupancy levels or persons per unit (PPU) have declined in Haldimand County from 2.81 in 2001 to 2.67 in 2011, largely driven by the aging of the population. Over the forecast period, average PPU levels are forecast to continue to decline to an average of 2.55 in 2041.
- The majority of new housing construction is anticipated to be oriented towards low-density housing forms (i.e. single detached/semi-detached), comprising 74% of forecast housing growth between 2011 and 2041. Over the forecast period, the share of medium- and high-density housing forms is anticipated to gradually increase, largely driven by forecast demographic trends (i.e. aging population) and decreasing housing affordability.

County-wide Employment Forecast

- Total employment is forecast to increase from 18,500 in 2011 to 25,600 in 2041, an increase of approximately 7,100 over the period, or 1.1% annually.
- During the forecast period, the County's employment activity rate (i.e. ratio of jobs per population) is expected to slightly increase from 41% to 42%.
- A large component of forecast employment growth is forecast to be concentrated in the industrial and commercial office sector throughout the County's designated employment areas. The industrial and office commercial employment sector which is anticipated to experience growth includes, distribution and warehousing/logistics, wholesale trade, construction, energy, information technology, agribusiness, finance, real estate and insurance and professional and scientific services.
- Given the steady rate of population growth forecast for the County, a significant share of employment growth is also anticipated in population-serving sectors such as retail, accommodation and food, personal services and institutional sectors related to education, government services and healthcare/social services.
- Over the next 30 years, increased opportunities will exist for work at home employment through improved telecommunication technology, increased opportunities related to telecommuting, and potential work schedule flexibility most notably in sectors which are geared towards the creative economy. Given the significant forecast increase in the 55+ population, it is likely that an increased number of working and semi-retired residents will

be seeking lifestyles which will allow them to work from home on a full-time or part-time basis.

Population, Housing and Employment Allocations by Urban Community and Remaining Rural Area

- The underlying assumption of the growth allocations by urban community, as is the case with the overall County forecast, is Haldimand's proximity to Hamilton and the southwest portion of the GTA. Given Haldimand's proximity to growing employment markets in the GTA and Hamilton, the County and, most notably, Caledonia are anticipated to attract steady new residential construction across a range of housing products by price and structure type. Accordingly, over the 2011-2041 period, approximately 53% of County-wide housing growth has been allocated to Caledonia.
- Relative to historical trend, steady population and housing growth is also forecast for the urban communities of Cayuga and Hagersville, while Dunnville, Jarvis and Townsend are anticipated to experience moderate to low population growth levels over the next 30 years.
- Despite steady historical housing growth in the remaining rural area of the County, both the percentage and absolute levels of future housing growth allocated to the rural area are forecast to decline in comparison to historical trends.
- From a market perspective, forecast demographic trends across the County and surrounding area suggest that the percentage share of future housing will continue to shift from the rural areas to the urban communities of the County as new families are attracted to the County in search of affordably priced ground-oriented housing located within proximity to local urban amenities (i.e. schools, retail, personal service uses, etc.) and surrounding employment markets.
- To a lesser extent, housing demands from the 55-74 age group (empty-nester/young seniors) and 75+ age group (older seniors) are also anticipated to drive the future need for housing within proximity to urban amenities (i.e. shopping, entertainment, hospitals/health care) and other community infrastructure.
- All of the County's urban communities are anticipated to experience employment growth over the forecast period. The share of employment on employment lands allocated to each urban community will largely depend on the amount of serviced (i.e. shovel-ready) and marketable designated employment lands which are available for development.
- It is estimated that approximately 55% of the County-wide employment growth will occur in Caledonia over the 2011-2041 period, driven by the market potential of the community's vacant employment lands, as well as demands for population-related employment associated with local population growth in this community.

1. INTRODUCTION

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1.1 Terms of Reference

Haldimand County retained Watson & Associates Economists Ltd. in the summer of 2013 to undertake an update to the County's 2009 Population, Household and Employment Forecast prepared by Hemson Consulting Ltd. The key objectives of this study are as follows:

- To assess economic, demographic and location conditions and any implications in terms of the nature, type and demand of different types of development activity in certain parts of the County in order to ensure that the forecasts are relevant;
- To review and re-assess the distribution of the growth forecasts by urban and rural area based on recent and anticipated development trends; and
- To determine whether the use of two distribution scenarios for overall growth in Haldimand County is appropriate and, if so, which forecast is the “most likely” and should be used for growth management and strategic planning purposes, including development charges calculations.

The results of this analysis are intended to guide decision making and policy development specifically related to planning and growth management, urban land needs, municipal finance and infrastructure planning carried out for Haldimand County. More specifically, this growth forecast update will be used as background to the County's Official Plan Review (OP) and updated Development Charges (2014 DC) Background Study.

1.2 Background

1.2.1 *Haldimand County – Local and Regional Growth Context*

As illustrated in Map 1-1, Haldimand County is located on the north shore of Lake Erie spanning over 1,252 square kilometres in area. As of 2011, the County had a population and employment base of approximately 44,800 and 18,500, respectively.¹ Haldimand County is a single tier municipality established in January, 2001 through the amalgamation of the former Towns of Haldimand and Dunnville, part of the former City of Nanticoke and part of the former Regional Municipality of Haldimand-Norfolk. Haldimand County is primarily a rural area with a number of urban communities, including Caledonia, Cayuga, Hagersville, Townsend, Dunnville and Jarvis.

¹ Note: 2011 population figures exclude the net Census undercount, which is estimated at approximately 4%.

Map 1-1: Haldimand County

The County is well positioned in the economic heartland of Southern Ontario. A key driver of population growth for Haldimand County is its proximity to the Greater Toronto Area and Hamilton (GTAH) and the growing potential for County residents who commute to the GTAH for employment. Over the next 30 years, the County's local employment base is also forecast to increase, generating new live/work opportunities within Haldimand. The County is also located immediately west of Niagara Region, and is within an hour's drive to the U.S border at Fort Erie, Ontario/Bufalo, New York.

1.2.2 Provincial Growth Context

There have been considerable changes since 2005 in the general provincial policies that guide planning, with the Province taking a much stronger role in managing growth, including mandating a fundamental shift in focus which places a priority on intensification of existing developed areas over greenfield development. This change in focus is most clearly reflected in the Growth Plan for the Greater Golden Horseshoe (the Growth Plan) which was released on June 16, 2006. Haldimand County is located within the jurisdiction of the Growth Plan in the southwest region of the Greater Golden Horseshoe (GGH).

The Growth Plan is intended to "guide decisions on a wide range of issues - transportation, infrastructure planning, land-use planning, urban form, housing, natural heritage and resource

protection – in the interest of promoting economic prosperity” (Section 1.1).² The Growth Plan also builds on other general provincial policy initiatives of which the most relevant of these to Haldimand County is the 2014 Provincial Policy Statement (PPS), effective April 30, 2014. The policy directions in the PPS are similar to those found in the Growth Plan; however, Growth Plan policies prevail where there is a conflict with the PPS.

Amendment 2, which came into effect on June 17, 2013, extends the forecasts set out in Schedules 3 and 7 of the Growth Plan to 2041, and updates the Growth Plan forecasts for the year 2031. The Minister of Infrastructure has set a date of June 17, 2018 for Official Plans to be brought into conformity with Amendment 2 to the Growth Plan for the GGH, 2006.

As set out in Schedule 3 of the June 2013 Growth Plan (Office Consolidation), Haldimand County’s population and employment base is forecast to reach 57,000 and 22,000, respectively, by 2031.¹ This represents a moderate increase of 1,000 persons and 2,000 additional jobs in comparison to the original 2031 population and employment forecasts provided in Schedule 3 of the Growth Plan. By 2041, the County’s population and employment base is forecast to increase to 64,000 and 25,000, respectively. Additional details regarding the population forecast by age structure, housing forecast by structure type (i.e. single detached, semi-detached, rows and apartments) and employment by land use category (i.e. employment lands employment, population-related and major office) are provided in the Technical Report to the Growth Plan, released November, 2012.³

The primary objective of this assignment is to update the County’s population, housing and employment growth allocations by urban settlement area and remaining rural area to 2041, in accordance with the revised figures set out in Amendment 2 to the Growth Plan.

² Places to Grow, Better Choices, Brighter Future, Growth Plan for the Greater Golden Horseshoe, 2006. Office Consolidation. Ministry of Infrastructure.

³ Greater Golden Horseshoe Growth Forecasts to 2041. Technical Report. November 2012. Hemson Consulting Ltd.

2. APPROACH AND METHODOLOGY

2. APPROACH AND METHODOLOGY

2.1 Population and Household Forecast Allocation Methodology

The approach used by Watson & Associates to allocate the County-wide population by urban settlement area and remaining rural area is based on the household formation methodology.⁴ This provincially accepted methodology is generally referred to in the Projection Methodology Guidelines released in 1995. This approach focuses on the rate of historical housing construction in the County by urban community and remaining rural area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, active residential applications in the development process, vacant designated residential lands and proximity to employment markets within the commuter-shed. The population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in persons per unit over time within existing households. This approach is particularly relevant to the County's Development Charge (DC) Background Study, as the DC calculation is derived from the gross population in new housing units. Chapter 3 provides further details regarding the assumptions used to allocate the population and housing forecast by urban community and remaining rural area.

2.2 Employment Forecast Allocation Methodology

As previously identified, the County-wide employment forecast has been derived from Amendment 2 to the Growth Plan in conjunction with the GGH Forecasts to 2041, Technical Report, released in 2012, to establish forecast County-wide employment growth by major employment sector.⁵

Similar to population forecasting, the most current provincially-accepted approach to forecasting employment and land needs was developed in 1995 to reflect the broader types of employment in local municipalities.¹ The methodology is based on an employment "activity rate" approach, which is defined as the number of jobs in a municipality divided by the number of residents. In forecasting future employment growth trends, predictions are made regarding future employment activity rates by sector (i.e. the ratio of jobs to population).

The employment forecast allocation approach used herein incorporates the employment activity rate approach; however, further rigour is provided with respect to the market potential for

⁴ Projection Methodology Guideline. A Guide to Projecting Population Housing Need, Employment and Related Land Requirements. 1995. Ontario. pg. 50.

⁵ Greater Golden Horseshoe Growth Forecasts to 2041. Technical Report. November 2012. Hemson Consulting Ltd.

industrial and office commercial employment sectors (i.e. sectors which are largely accommodated on employment lands) which are not directly driven by population growth. This includes an analysis of the following:

- historical employment activity, construction and land absorption rates;
- available serviced and serviceable employment land supply (i.e. shovel-ready employment land) and future greenfield development opportunities on vacant designated employment lands;
- impacts of regional infrastructure (i.e. access and exposure to provincial highways and arterial roads); and
- market character of employment areas (i.e. heavy vs. general vs. prestige).

Chapter 3 provides further details regarding the assumptions used to allocate the employment forecast by urban community and remaining rural area.

3. COUNTY-WIDE LONG-TERM FORECASTS: POPULATION, HOUSING AND EMPLOYMENT

3. COUNTY-WIDE LONG-TERM FORECASTS: POPULATION, HOUSING AND EMPLOYMENT

This Chapter summarizes the long-term population, household and employment forecasts for Haldimand County from 2011 to 2041 by urban community and remaining rural area. Additional details with respect to the population, housing and employment forecasts are provided in Appendix A.

3.1 County-wide Growth Scenarios

As set out in the terms of reference for this assignment, two long-term population, housing and employment growth scenarios were explored for the County as a whole. The first scenario, as summarized on Figure 3-1 (below), conforms with Amendment 2 to the Growth Plan. A second scenario, was also explored which considered a lower rate of population and employment growth for the County, based on a lower rate of anticipated housing construction activity primarily in Caledonia. Based on considerable review of the two growth options and discussions with County staff, it was determined that the first scenario (the scenario summarized herein) represents the “most likely” and recommended long-term population and employment growth scenario for the County.

3.2 County-wide Population and Housing Forecast

Figure 3-1 summarizes the recommended County-wide population and housing forecasts for the 2011-2041 period in comparison with recent historical trends over the 2001-2011 period. Key findings regarding the County-wide and urban community population and housing forecasts are summarized below:

- The County’s population is forecast to increase by approximately 17,300 persons over the forecast period, growing from 46,700 persons in 2011 to 64,000 in 2041. This represents an average annual population growth rate of 1.1%. Comparatively, the population for the Province of Ontario as a whole is also forecast to increase at an annual rate of 1.1%, between 2011 and 2041.
- Haldimand County’s housing base is forecast to increase from approximately 16,830 in 2011 to 21,140 in 2041, an increase of 7,300 or 1.1% annually.
- Average housing occupancy levels or persons per unit (PPU) have declined in Haldimand County from 2.81 in 2001 to 2.67 in 2011, largely driven by the aging of the population. Over the forecast period, average PPU levels are forecast to continue to decline to an average of 2.55 in 2041.
- The majority of new housing construction is anticipated to be oriented towards low-density housing forms (i.e. single detached/semi-detached), comprising 74% of forecast

housing growth between 2011 and 2041. Over the forecast period, the share of medium- and high-density housing forms is anticipated to gradually increase largely driven by the aging of the “baby boom” population (born 1946-1964) as well as housing demands generated by the children of the baby boomers, the “baby boom echo” (born 1980-1992).

Figure 3-1
Haldimand County
Population and Household Forecast, 2011-2041

Year	Population (Excluding Census Undercount)	Population (Including Census Undercount) ¹	Housing Units					Total Households	Person Per Unit (PPU)
			Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Other			
Mid 2001	43,700	45,400	13,650	640	1,175	95	15,560	2.81	
Mid 2006	45,212	47,000	14,510	685	1,085	40	16,320	2.77	
Mid 2011	44,874	46,700	14,785	910	1,085	50	16,830	2.67	
Mid 2016	46,141	48,000	15,343	1,026	1,125	50	17,544	2.63	
Mid 2021	48,153	50,100	16,219	1,224	1,218	50	18,711	2.57	
Mid 2026	51,177	53,200	17,166	1,442	1,334	50	19,991	2.56	
Mid 2031	54,538	56,700	18,213	1,686	1,477	50	21,426	2.55	
Mid 2036	57,920	60,200	19,205	1,934	1,615	50	22,803	2.54	
Mid 2041	61,654	64,100	20,170	2,175	1,749	50	24,143	2.55	
Mid 2001 - Mid 2006	1,512	1,600	860	45	-90	-55	760		
Mid 2006 - Mid 2011	-338	-300	275	225	0	10	510		
Mid 2011 - Mid 2021	3,279	3,400	1,434	314	133	0	1,881		
Mid 2011 - Mid 2031	9,664	10,000	3,428	776	392	0	4,596		
Mid 2011 - Mid 2041	16,780	17,400	5,385	1,265	664	0	7,313		
Mid 2011 - Mid 2021	Percentage Household Growth by Housing Unit Structure Type,		76.2%	16.7%	7.1%		100.0%		
Mid 2011 - Mid 2031			74.6%	16.9%	8.5%		100.0%		
Mid 2011 - Mid 2041			73.6%	17.3%	9.1%		100.0%		

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%. Note: Population Including the Undercount has been rounded.

2. Includes townhomes and apartments in duplexes.

3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

3.3 Population and Housing Growth Allocations

Figure 3-2 summarizes the population and housing forecasts by urban community and remaining rural area, which have been derived based on a review of residential supply and demand factors by local municipality, including:

Local Supply Factors:

- Supply of potential future housing stock in the development process by housing structure type and approval status;
- Housing intensification opportunities;
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process;
- A high-level review of identified water and wastewater servicing capacity and potential solutions to overcome constraints (where identified); and
- Provincial policy direction regarding forecast residential growth by urban versus rural area.

Demand Factors:

- Historical population and housing activity by structure type based on 2001-2011 Statistics Canada (Census) data by urban community and remaining rural area;
- A review of historical residential building permit activity (new units only) by structure type from 2003 to 2012 by urban community and remaining rural area;
- Influence of population and employment growth within the surrounding market areas on the geographic distribution of growth and settlement patterns across the County;
- Market demand for housing intensification; and
- Appeal to empty-nesters/seniors.

While population and employment growth rates vary significantly by urban community, each of the six urban communities share a number of relatively common attributes with respect to growth drivers and long-term development trends. These include:

- All local urban communities are expected to experience housing growth over the long-term forecast period.
- Average annual new housing construction is anticipated to increase from recent levels experienced over the past five years, as the regional economy gradually recovers from the recent 2008/2009 economic downturn.
- Future housing growth will be dominated by low-density housing forms; however, increasing market opportunities will exist for medium- and high-density housing as the local and provincial population base continues to age. Looking forward, this has implications regarding the need for both seniors' and affordable housing.
- Persons per housing unit (PPU) levels are forecast to steadily decline from 2011 to 2041. Both the rate and type of housing growth (i.e. single detached, townhomes and apartments) will have a significant influence on projected PPU levels.

The underlying assumption of the growth allocations by urban community, as is the case with the overall County forecast, is Haldimand's proximity to Hamilton and the southwest portion of the GTA. Given Haldimand's proximity to growing employment markets in the GTA and Hamilton, the County and, most notably, Caledonia are anticipated to attract steady new residential construction across a range of housing products by price and structure type. Currently, the County is reviewing a large-scale plan of subdivision (Empire Homes) for approximately 3,000 housing units, which is pending draft approval upon completion of required background servicing and related studies.

Based on regional demographic trends and identified local housing market potential, approximately 53% of County-wide housing growth has been allocated to Caledonia. As of 2011, Caledonia comprised approximately 21% of the occupied housing base. By 2041,

Caledonia is estimated to comprise 31% of the County's total occupied housing base, due to anticipated development pressure.

Relative to historical trends, steady population growth is also forecast for the urban communities of Cayuga and Hagersville, while Dunnville, Jarvis and Townsend are anticipated to experience moderate to low growth levels over the next 30 years.

Figure 3-2
Haldimand County
Urban Community Population Forecasts by Urban Community
and Remaining Rural Area, 2011-2041

Year	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Remaining Rural	Haldimand County
2011	10,400	1,700	6,000	2,700	1,200	2,600	22,000	46,600
2016	10,800	1,900	6,100	3,100	1,200	2,600	22,400	48,100
2021	12,300	2,100	6,100	3,500	1,200	2,600	22,300	50,100
2026	14,200	2,300	6,300	4,000	1,200	2,700	22,600	53,300
2031	16,600	2,500	6,500	4,500	1,200	2,700	22,800	56,800
2036	18,900	2,700	6,600	5,000	1,200	2,800	23,100	60,300
2041	21,200	2,900	6,800	5,400	1,200	2,900	23,600	64,000
2011-2031	6,200	800	500	1,800	0	100	800	10,200
2011-2041	10,800	1,200	800	2,700	0	300	1,600	17,400

Source: Watson & Associates Economists Ltd., 2014.

Note: Population figures include a net Census undercount of approximately 4%.

Figures may not add precisely due to rounding

Figure 3-3
Haldimand County
Urban Community Housing Forecasts, 2011-2041

Year	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Remaining Rural	Haldimand County
2011	3,520	680	2,500	1,060	400	900	7,780	16,840
2016	3,700	740	2,550	1,220	400	920	8,020	17,550
2021	4,300	820	2,630	1,370	410	940	8,250	18,720
2026	4,980	890	2,720	1,540	420	980	8,460	19,990
2031	5,810	970	2,810	1,720	430	1,020	8,670	21,430
2036	6,600	1,060	2,900	1,880	440	1,060	8,870	22,810
2041	7,400	1,120	2,980	2,030	450	1,100	9,070	24,150
2011-2031	2,290	290	310	660	30	120	890	4,590
2011-2041	3,880	440	480	970	50	200	1,290	7,310

Source: Watson & Associates Economists Ltd., 2014.

Figures may not add precisely due to rounding

Figure 3-4 summarizes the percent share of forecast housing growth by urban community and remaining rural area relative to the 2011 housing base. Figure 3-4 also summarizes the impact of the 2011 to 2041 housing forecast on the share of total housing by urban community and remaining rural area in year 2041.

As of 2011, 54% of the County's housing base is located within the six urban communities of Caledonia, Cayuga, Dunnville, Hagersville, Townsend and Jarvis. The remaining 46% of the 2011 County housing base is located in the remaining rural area. Over the 2011-2041 forecast period, the percentage share of housing is forecast to steadily shift towards the urban area driven by urban housing demand, largely in Caledonia, as well as continued tightening of provincial planning policy which directs development to settlement areas. Over the 2011-2041 forecast period, 72% of forecast housing growth has been allocated to Haldimand County's urban communities. Based on this forecast, the percentage of total households in urban communities is forecast to steadily increase from 54% in 2011 to 62% by 2041.

Figure 3-4
Haldimand County
Percentage Share of Housing Growth by Urban Community, 2011-2041

Local Community	Percent of 2011 County Housing	Percent of 2011-2041 County Housing Growth	Percent of 2041 County Housing
Caledonia	21%	53%	31%
Cayuga	4%	6%	5%
Dunnville	15%	7%	12%
Hagersville	6%	13%	8%
Townsend	2%	1%	2%
Jarvis	5%	3%	5%
Remaining Rural	46%	18%	38%
Haldimand County	100%	100%	100%

Source: Watson & Associates Economists Ltd., 2014.

In contrast to the above, recent building permit and Census data indicates that development activity has been heavily concentrated in the rural areas of the County. However, it is noted that the share of total development activity occurring in the rural area has declined to 41% over the 2008-2012 period from 56% over the 2003-2007 period. From a market perspective, forecast demographic trends across the County and surrounding area suggest that the percentage share of future housing will continue to shift from the rural areas to the urban communities of the County as new families are attracted to the County in search of affordably priced ground-oriented housing located within proximity to local urban amenities (i.e. schools, retail, personal service uses) and surrounding employment markets.

To a lesser extent, housing demands from the 55-74 age group (empty-nester/young seniors) and 75+ age group (older seniors) are also anticipated to drive the future need for urban housing in Haldimand County. Housing preferences within the 55-74 age group are typically geared toward ground-oriented housing forms (i.e. single detached, semi-detached and townhomes) which provide proximity to urban amenities, municipal services and community infrastructure. With respect to the 75+ age group, the physical and socio-economic characteristics of this cohort age group (on average) are considerably different than those of the

younger seniors, empty-nesters and working adults with respect to income, mobility and health. Typically, these characteristics represent a key driver behind their propensity for medium- and high-density housing forms (including seniors' housing) in urban areas which are in proximity to urban amenities, hospitals/health care facilities and other community facilities which are geared toward this age group. Accordingly, as the population continues to age, demand for urban housing to accommodate both empty-nesters/young seniors and older seniors is forecast to increase across the urban areas of the County.

3.4 County-wide Employment Forecasts

Figure 3-5 summarizes the employment forecast for Haldimand County by major employment sector from 2011 to 2041 in comparison with recent historical trends.

The following key observations have been made with respect to the County's long-term employment growth potential:

- Total employment is forecast to increase from 18,500 in 2011 to 25,600 in 2041, an increase of approximately 7,100 over the period, or 1.1% annually.
- During the forecast period, the County's employment activity rate (i.e. ratio of jobs per population) is expected to slightly increase from 41% to 42%.
- A large component of forecast employment growth is forecast to be concentrated in the industrial and commercial office sector throughout the County's designated employment areas. The industrial and office commercial employment sector which is anticipated to experience growth includes distribution and warehousing/logistics, wholesale trade, construction, energy, information technology, agribusiness, finance, real estate and insurance and professional and scientific services.
- Given the steady rate of population growth forecast for the County, a significant share of employment growth is also anticipated in population-serving sectors such as retail, accommodation and food, personal services and institutional sectors related to education, government services and healthcare/social services.
- Over the next 30 years, increased opportunities will exist for work at home employment through improved telecommunication technology, increased opportunities related to telecommuting, and potential work schedule flexibility most notably in sectors which are geared towards the creative economy. Given the significant forecast increase in the 55+ population, it is likely that an increased number of working and semi-retired residents will be seeking lifestyles which will allow them to work from home on a full-time or part-time basis.

It is noted that the employment forecast also includes employees who have no fixed place of work (NFPOW). Statistics Canada defines NFPOW employment as "persons who do not go

from home to the same work place location at the beginning of each shift.”⁶ Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc. The Growth Plan allocates the number of NFPOW employees within the GTAH based on the distribution of employees in similar economic sectors within a common labour market area. This generally reflects where people happened to be working on Census day. The number of NFPOW employees as of 2001 can be calculated for Haldimand County as per Schedule 3 of Places to Grow, by subtracting the total 2001 employment base (17,000) less the total number of 2001 Census employment by usual place of work + work at home (15,000). The difference between these two figures provides a No Fixed Place of Work employment figure of 2,000. The estimated number of 2011 NFPOW employees in Haldimand County is 2,700. Over the 2011-2041 forecast period, the number of NFPOW employees is forecast to rise from 2,700 to 3,900, representing an increase of 1,200.

Figure 3-5
Haldimand County
Employment Forecast, 2011-2041

Period	Population	Employment							
		Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	NFPOW	Total	Employment Activity Rate
2001	43,700	810	2,420	5,560	3,890	2,340	2,200	17,210	39%
2006	45,200	830	2,220	5,630	4,380	2,710	2,590	18,360	41%
2011	44,900	860	2,010	5,470	4,490	3,050	2,670	18,550	41%
Mid 2016	46,100	880	2,040	5,670	4,660	3,180	2,970	19,400	42%
Mid 2021	48,200	880	2,060	6,060	4,810	3,280	3,270	20,350	42%
Mid 2026	51,200	880	2,140	6,340	4,910	3,380	3,420	21,070	41%
Mid 2031	54,500	890	2,230	6,810	5,120	3,520	3,570	22,140	41%
Mid 2036	57,900	930	2,360	7,410	5,440	3,790	3,720	23,660	41%
Mid 2041	61,700	970	2,520	8,460	5,790	4,010	3,870	25,610	42%
2011 - 2041	16,800	110	510	2,990	1,300	960	1,200	7,060	
% 2011 - 2041		2%	7%	42%	18%	14%	17%	100%	

Source: 2001-2011 based on Census data. 2011-2041 employment forecast derived by Watson & Associates Economists Ltd. (2014) in accordance with Schedule 3 of Places to Grow, Office Consolidation, June, 2013.

3.5 Employment Growth Allocations

Figure 3-6 summarizes the County’s employment forecast by urban community and remaining rural area. The employment growth forecasts by urban community and remaining rural area have been determined based on a review of the following:

- A review of historical and forecast employment growth rates within the Haldimand County commuter-shed;

⁶ Statistics Canada. 2011 Census Dictionary.

- Recent non-residential building permit data by industrial, commercial and institutional (ICI) sector by urban community;
- The availability and marketability of the County's designated vacant serviced or serviceable employment land supply;
- Impacts of local population growth by urban community on demands for population-related employment in the retail, personal service and institutional sector; and
- Discussion with County staff regarding recent non-residential development trends and future employment prospects by urban community.

All of the County's urban communities are anticipated to experience employment growth over the forecast period. The share of industrial employment growth allocated to each urban community will largely depend on the amount of serviced (i.e. shovel-ready) and marketable designated employment lands which are available for development over the next 30 years. It is estimated that approximately 55% of the County-wide employment growth will occur in Caledonia over the 2011-2041 period, driven by the market potential of vacant employment lands in this area, as well as demands for population-related employment associated with local population growth in this community.

Figure 3-6
Haldimand County
Employment Forecasts by Urban Community, 2011-2041

Year	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Remaining Rural	Haldimand County
2011-2021	870	170	220	270	30	60	190	1,810
2011-2031	1,950	260	400	400	50	200	340	3,600
2011-2041	3,910	400	850	640	80	580	610	7,070
2011-2021	48%	9%	12%	15%	2%	3%	10%	100%
2011-2031	54%	7%	11%	11%	1%	6%	9%	100%
2011-2041	55%	6%	12%	9%	1%	8%	9%	100%

Source: Watson & Associates Economists Ltd., 2014.

Figures may not add precisely due to rounding

4. FORECAST COMPARISON WITH PREVIOUS 2009 UPDATE

4. FORECAST COMPARISON WITH PREVIOUS 2009 UPDATE

As previously indicated, Haldimand County's population is forecast to increase to 56,700 by 2031 and 64,000 by 2031 and 2041, respectively, in accordance with Growth Plan Amendment 2. This represents a slightly faster population growth rate than originally estimated in the 2006 Growth Plan (56,000 by 2031), despite relatively lower population growth levels experienced during the 2006-2011 Census period.

As outlined in Chapter 1, a key objective of this growth update is to review and re-assess the distribution of the growth forecasts by urban and rural area based on recent and anticipated development trends. Figure 4-1 compares the housing forecast for the County by urban community and remaining rural area provided in this update to the housing forecast prepared by Hemson Consulting Ltd. as part of the 2009 Population, Household and Employment Forecast Update. Key observations include:

- Between 2001 and 2041, the percentage share of housing activity allocated to the remaining rural area is forecast to decline in comparison to the previous 2009 update. The trend is anticipated to be driven by market demand for urban housing from families, empty-nesters and seniors, as well as the impacts associated with provincial and local planning policy which directs population and housing growth to settlement areas.
- The percentage share of forecast housing growth allocated to Caledonia is anticipated to increase significantly based on a review of current residential development applications in this area, most notably the plan of subdivision for approximately 3,000 new homes submitted by Empire Homes, which is currently pending approval subject to the completion of a number of required background studies.
- The percentage share of forecast housing growth is anticipated to remain relatively steady in Cayuga and Hagersville, but is expected to decline slightly in Jarvis/Townsend and Dunnville.

Figure 4-1
Percentage Share of Housing Growth
by Urban Community and Remaining Rural Area,
2009 vs. 2014 Growth Forecast

Location	Hemson Consulting 2011-2031 (2009) ¹	Watson & Associates 2011-2041 (2014)
Caledonia	40%	53%
Cayuga	5%	6%
Dunnville	12%	7%
Hagersville	15%	13%
Jarvis/Townsend	5%	3%
Remaining Rural	23%	18%
Haldimand County	100%	100%

1. Derived from the Population, Household & Employment Forecast Update 2011-2031 prepared by Hemson Consulting Ltd., 2009

5. CONCLUSIONS

5. CONCLUSIONS

The results of this growth forecast update indicate that Haldimand County is well positioned to capture a modest share of the total population and employment growth forecast across the GGH over the next 30 years. The following provides a summary of the key findings of this report.

County-wide Population and Housing Forecast

- The County's population is forecast to increase by approximately 17,300 persons over the forecast period, growing from 46,700 persons in 2011 to 64,000 in 2041. This represents an average annual population growth rate of 1.1%. Comparatively, the population for the Province of Ontario as a whole is also forecast to increase at an annual rate of 1.1%, between 2011 and 2041.
- Haldimand County's housing base is forecast to increase from approximately 16,830 in 2011 to 21,140 in 2041, an increase of 7,300 or 1.1% annually.
- Average housing occupancy levels or persons per unit (PPU) have declined in Haldimand County from 2.81 in 2001 to 2.67 in 2011, largely driven by the aging of the population. Over the forecast period, average PPU levels are forecast to continue to decline to an average of 2.55 in 2041.
- The majority of new housing construction is anticipated to be oriented towards low-density housing forms (i.e. single detached/semi-detached), comprising 74% of forecast housing growth between 2011 and 2041. Over the forecast period, the share of medium- and high-density housing forms is anticipated to gradually increase, largely driven by forecast demographic trends (i.e. aging population) and decreasing housing affordability.

County-wide Employment Forecast

- Total employment is forecast to increase from 18,500 in 2011 to 25,600 in 2041, an increase of approximately 7,100 over the period, or 1.1% annually.
- During the forecast period, the County's employment activity rate (i.e. ratio of jobs per population) is expected to slightly increase from 41% to 42%.
- A large component of forecast employment growth is forecast to be concentrated in the industrial and commercial office sector throughout the County's designated employment areas. The industrial and office commercial employment sector which is anticipated to experience growth includes, distribution and warehousing/logistics, wholesale trade, construction, energy, information technology, agribusiness, finance, real estate and insurance and professional and scientific services.

- Given the steady rate of population growth forecast for the County, a significant share of employment growth is also anticipated in population-serving sectors such as retail, accommodation and food, personal services and institutional sectors related to education, government services and healthcare/social services.
- Over the next 30 years, increased opportunities will exist for work at home employment through improved telecommunication technology, increased opportunities related to telecommuting, and potential work schedule flexibility most notably in sectors which are geared towards the creative economy. Given the significant forecast increase in the 55+ population, it is likely that an increased number of working and semi-retired residents will be seeking lifestyles which will allow them to work from home on a full-time or part-time basis.

Population, Housing and Employment Allocations by Urban Community and Remaining Rural Area

- The underlying assumption of the growth allocations by urban community, as is the case with the overall County forecast, is Haldimand's proximity to Hamilton and the southwest portion of the GTA. Given Haldimand's proximity to growing employment markets in the GTA and Hamilton, the County and, most notably, Caledonia are anticipated to attract steady new residential construction across a range of housing products by price and structure type. Accordingly, over the 2011-2041 period, approximately 53% of County-wide housing growth has been allocated to Caledonia.
- Relative to historical trend, steady population and housing growth is also forecast for the urban communities of Cayuga and Hagersville, while Dunnville, Jarvis and Townsend are anticipated to experience moderate to low population growth levels over the next 30 years.
- Despite steady historical housing growth in the remaining rural area of the County, both the percentage and absolute levels of future housing growth allocated to the rural area are forecast to decline in comparison to historical trends.
- From a market perspective, forecast demographic trends across the County and surrounding area suggest that the percentage share of future housing will continue to shift from the rural areas to the urban communities of the County as new families are attracted to the County in search of affordably priced ground-oriented housing located within proximity to local urban amenities (i.e. schools, retail, personal service uses, etc.) and surrounding employment markets.
- To a lesser extent, housing demands from the 55-74 age group (empty-nester/young seniors) and 75+ age group (older seniors) are also anticipated to drive the future need for housing within proximity to urban amenities (i.e. shopping, entertainment, hospitals/health care) and other community infrastructure.
- All of the County's urban communities are anticipated to experience employment growth over the forecast period. The share of employment on employment lands allocated to

each urban community will largely depend on the amount of serviced (i.e. shovel-ready) and marketable designated employment lands which are available for development.

- It is estimated that approximately 55% of the County-wide employment growth will occur in Caledonia over the 2011-2041 period, driven by the market potential of the community's vacant employment lands, as well as demands for population-related employment associated with local population growth in this community.

**APPENDIX A
HALDIMAND COUNTY
DETAILED GROWTH FORECASTS**

Table A-1
Caledonia
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	9,999	10,400	3,015	215	285	3,515	2.84
2016	10,356	10,770	3,127	279	293	3,699	2.80
2021	11,814	12,285	3,550	406	340	4,296	2.75
2026	13,676	14,225	4,036	540	404	4,981	2.75
2031	15,923	16,560	4,626	686	494	5,806	2.74
2036	18,126	18,850	5,189	846	567	6,603	2.75
2041	20,426	21,245	5,776	991	630	7,398	2.76
2011 - 2031	5,924	6,160	1,611	471	209	2,291	
2011 - 2041	10,427	10,845	2,761	776	345	3,883	

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Table A-2
Cayuga
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	1,622	1,685	495	95	85	675	2.40
2016	1,786	1,860	544	108	88	740	2.41
2021	1,971	2,050	604	127	89	820	2.40
2026	2,166	2,250	660	143	92	895	2.42
2031	2,370	2,465	720	161	94	975	2.43
2036	2,581	2,685	772	179	104	1,055	2.45
2041	2,765	2,875	807	197	116	1,120	2.47
2011 - 2031	748	780	225	66	9	300	
2011 - 2041	1,143	1,190	312	102	31	445	

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Table A-3
Dunnville
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	5,789	6,020	1,785	300	415	2,500	2.32
2016	5,825	6,060	1,823	310	418	2,550	2.28
2021	5,874	6,110	1,876	330	424	2,630	2.23
2026	6,043	6,285	1,933	355	433	2,721	2.22
2031	6,209	6,455	1,990	382	443	2,815	2.21
2036	6,371	6,625	2,041	408	451	2,900	2.20
2041	6,578	6,840	2,083	434	463	2,980	2.21
2011 - 2031	420	435	205	82	28	315	
2011 - 2041	789	820	298	134	48	480	

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Table A-4
Hagersville
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	2,579	2,680	770	170	120	1,060	2.43
2016	2,996	3,115	877	195	143	1,215	2.47
2021	3,372	3,505	975	220	176	1,370	2.46
2026	3,847	4,000	1,090	248	207	1,545	2.49
2031	4,313	4,485	1,199	282	239	1,720	2.51
2036	4,760	4,950	1,298	310	277	1,885	2.53
2041	5,190	5,395	1,384	345	305	2,035	2.55
2011 - 2031	1,734	1,805	429	112	119	660	
2011 - 2041	2,611	2,715	614	175	185	975	

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Table A-5
Townsend
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	1,174	1,220	323	18	60	400	2.93
2016	1,166	1,210	323	19	63	405	2.88
2021	1,142	1,190	324	21	65	410	2.79
2026	1,151	1,200	326	25	70	420	2.74
2031	1,158	1,205	327	28	75	430	2.69
2036	1,170	1,215	329	32	80	440	2.66
2041	1,193	1,240	330	35	85	450	2.65
2011 - 2031	-16	-15	5	11	15	30	
2011 - 2041	20	20	8	18	25	50	

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Table A-6
Jarvis
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	2,513	2,615	695	85	120	900	2.79
2016	2,509	2,610	707	87	121	915	2.74
2021	2,501	2,600	723	93	124	940	2.66
2026	2,561	2,665	744	104	128	975	2.63
2031	2,630	2,735	764	120	132	1,015	2.59
2036	2,710	2,820	788	132	136	1,055	2.57
2041	2,816	2,930	802	144	149	1,095	2.57
2011 - 2031	117	120	69	35	12	115	
2011 - 2041	303	315	107	59	29	195	

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Table A-7
Remaining Rural
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	21,198	22,045	7,753	28	0	7,780	2.72
2016	21,503	22,365	7,993	28	0	8,020	2.68
2021	21,478	22,335	8,218	28	0	8,245	2.60
2026	21,733	22,600	8,428	28	0	8,455	2.57
2031	21,935	22,815	8,638	28	0	8,665	2.53
2036	22,201	23,090	8,838	28	0	8,865	2.50
2041	22,686	23,595	9,038	28	0	9,065	2.50
2011 - 2031	737	770	885	0	0	885	
2011 - 2041	1,488	1,550	1,285	0	0	1,285	

Source: Watson & Associates Economists Ltd., 2014.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Table A-8
Haldimand County
Population and Household Forecast, 2011-2041

Year	Population (Excluding Undercount)	Population (Including Undercount) ¹	Households				PPU
			Singles & Semi- Detached	Multiples ²	Apartments ³	Total Residential	
2011	44,874	46,670	14,835	910	1,085	16,830	2.67
2016	46,141	47,985	15,393	1,026	1,125	17,544	2.63
2021	48,153	50,080	16,269	1,224	1,218	18,711	2.57
2026	51,177	53,225	17,216	1,442	1,334	19,991	2.56
2031	54,538	56,720	18,263	1,686	1,477	21,426	2.55
2036	57,920	60,235	19,255	1,934	1,615	22,803	2.54
2041	61,654	64,120	20,220	2,175	1,749	24,143	2.55
2011 - 2031	9,664	10,050	3,428	776	392	4,596	
2011 - 2041	16,780	17,450	5,385	1,265	664	7,313	

Source: Watson & Associates Economists Ltd., 2014. County-wide forecast derived from the Growth Plan for the Greater Golden Horseshow (Places to Grow), Amendment 2.

1. Census Undercount estimated at approximately 4%.
2. Includes townhomes and apartments in duplexes.
3. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

**Table A-9
Haldimand County
Incremental Permanent Population and Household Growth Forecast by Local Municipality, 2011-2041**

DEVELOPMENT LOCATION	TIMING	SINGLES & SEMI- DETACHED	MULTIPLES ¹	APARTMENTS ²	TOTAL RESIDENTIAL UNITS	GROSS POPULATION IN NEW UNITS	EXISTING UNIT POPULATION CHANGE	NET POPULATION INCREASE
Caledonia	2011-2016	112	64	8	184	555	(198)	357
	2011-2021	535	191	55	781	2,340	(525)	1,815
	2011-2026	1,021	325	119	1,466	4,375	(698)	3,677
	2011-2031	1,611	471	209	2,291	6,819	(895)	5,924
	2011-2036	2,174	631	282	3,088	9,174	(1,047)	8,127
2011-2041	2,761	776	345	3,883	11,523	(1,097)	10,427	
Cayuga	2011-2016	49	13	3	65	196	(32)	164
	2011-2021	109	32	4	145	434	(85)	349
	2011-2026	165	48	7	220	657	(113)	544
	2011-2031	225	66	9	300	893	(145)	748
	2011-2036	277	84	19	380	1,129	(170)	959
2011-2041	312	102	31	445	1,321	(178)	1,143	
Dunville	2011-2016	38	10	3	50	151	(114)	36
	2011-2021	91	30	9	130	389	(304)	85
	2011-2026	148	55	18	221	658	(404)	254
	2011-2031	205	82	28	315	938	(518)	420
	2011-2036	256	108	36	400	1,188	(606)	582
2011-2041	298	134	48	480	1,424	(635)	789	
Hagersville	2011-2016	107	25	23	155	468	(51)	417
	2011-2021	205	50	56	310	929	(135)	793
	2011-2026	320	78	87	485	1,448	(180)	1,268
	2011-2031	429	112	119	660	1,964	(231)	1,734
	2011-2036	528	140	157	825	2,451	(270)	2,181
2011-2041	614	175	185	975	2,893	(283)	2,611	
Townsend	2011-2016	1	2	2	5	15	(23)	(8)
	2011-2021	1	3	5	10	30	(62)	(32)
	2011-2026	3	7	10	20	60	(82)	(22)
	2011-2031	5	11	15	30	89	(105)	(16)
	2011-2036	6	14	20	40	119	(123)	(4)
2011-2041	8	18	25	50	148	(129)	20	
Jarvis	2011-2016	12	2	1	15	45	(50)	(4)
	2011-2021	28	8	4	40	120	(132)	(12)
	2011-2026	49	19	8	75	224	(176)	48
	2011-2031	69	35	12	115	342	(225)	117
	2011-2036	93	47	16	155	461	(263)	197
2011-2041	107	59	29	195	579	(276)	303	
Remaining Rural Areas	2011-2016	240	-	-	240	724	(419)	305
	2011-2021	465	-	-	465	1,393	(1,113)	280
	2011-2026	675	-	-	675	2,015	(1,480)	535
	2011-2031	885	-	-	885	2,634	(1,897)	737
	2011-2036	1,085	-	-	1,085	3,224	(2,220)	1,003
2011-2041	1,285	-	-	1,285	3,813	(2,325)	1,488	
Total Haldimand County	2011-2016	558	116	40	714	2,154	(887)	1,267
	2011-2021	1,434	314	133	1,881	5,635	(2,357)	3,279
	2011-2026	2,381	532	249	3,161	9,437	(3,134)	6,303
	2011-2031	3,428	776	392	4,596	13,680	(4,016)	9,664
	2011-2036	4,420	1,024	530	5,973	17,746	(4,700)	13,046
2011-2041	5,385	1,265	664	7,313	21,703	(4,923)	16,780	

Source: Watson & Associates Economists Ltd., 2014. County-wide forecast derived from the Growth Plan for the Greater Golden Horseshow (Places to Grow), Amendment 2.

Residential distribution based on a combination of historical permit activity, available housing supply and discussions with County staff regarding future development prospects.

1. Includes townhomes and apartments in duplexes.

2. Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

**Table A-10
Haldimand County
Incremental Employment Growth by Local Municipality, 2011-2041**

DEVELOPMENT LOCATION	TIMING	PRIMARY	WORK AT HOME (WAH)	INDUSTRIAL	COMMERCIAL/ POPULATION RELATED	INSTITUTIONAL	NFPOW ¹	TOTAL EMPLOYMENT
Caledonia	2011-2016	-	9	106	87	61	125	389
	2011-2021	-	26	317	170	121	240	874
	2011-2026	-	72	524	236	189	290	1,311
	2011-2031	-	127	815	379	288	340	1,949
	2011-2036	-	218	1,157	600	466	390	2,831
2011-2041	-	313	1,730	836	587	440	3,906	
Cayuga	2011-2016	-	10	-	-	-	35	45
	2011-2021	-	10	40	34	25	60	169
	2011-2026	-	20	50	36	28	75	210
	2011-2031	-	25	60	49	36	90	260
	2011-2036	-	35	75	70	55	105	340
2011-2041	-	50	75	89	70	120	404	
Dunville	2011-2016	-	5	75	15	10	25	130
	2011-2021	-	5	140	20	10	45	220
	2011-2026	-	10	170	35	15	55	285
	2011-2031	-	15	250	40	25	65	395
	2011-2036	-	25	400	48	40	75	588
2011-2041	-	40	600	65	60	85	850	
Hagersville	2011-2016	-	5	-	56	44	70	174
	2011-2021	-	5	-	77	56	135	274
	2011-2026	-	10	-	85	66	160	321
	2011-2031	-	20	-	113	84	185	403
	2011-2036	-	30	-	160	124	210	524
2011-2041	-	45	-	202	155	235	637	
Townsend	2011-2016	-	-	-	-	2	10	12
	2011-2021	-	-	-	3	4	20	27
	2011-2026	-	2	-	5	6	25	38
	2011-2031	-	3	-	9	8	30	50
	2011-2036	-	5	-	11	10	35	61
2011-2041	-	7	-	13	15	40	75	
Jarvis	2011-2016	-	-	-	-	-	5	5
	2011-2021	-	-	49	-	-	10	59
	2011-2026	-	5	77	5	2	15	104
	2011-2031	-	10	155	10	5	20	200
	2011-2036	-	15	226	15	10	25	291
2011-2041	-	20	485	30	20	30	585	
Remaining Rural Areas	2011-2016	20	5	20	10	15	30	100
	2011-2021	21	5	40	15	15	90	186
	2011-2026	28	10	50	20	20	130	258
	2011-2031	37	15	60	30	24	170	336
	2011-2036	75	25	80	50	37	210	477
2011-2041	113	30	100	65	48	250	606	
Total Haldimand County	2011-2016	20	34	201	168	132	300	855
	2011-2021	21	51	586	320	230	600	1,808
	2011-2026	28	129	871	423	326	750	2,527
	2011-2031	37	215	1,340	630	470	900	3,592
	2011-2036	75	353	1,938	954	742	1,050	5,112
2011-2041	113	505	2,990	1,300	955	1,200	7,063	

Source: Watson & Associates Economists Ltd., 2014. County-wide forecast derived from the Growth Plan for the Greater Golden Horseshow (Places to Grow), Amendment 2.

1. Statistics Canada defines no fixed place of work (NFPOW) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.