

# Attachment A-11

## Updated Population and Housing Issue Paper

Regional Plan Review Phase 4

### Prepared by:

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Planning & Development  
March 2025

The HALIFAX logo is located in the bottom right corner of the page. It consists of the word "HALIFAX" in a bold, blue, sans-serif font. The letter "A" is stylized with a small gap in the middle.

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# 1.0 Report Purpose and Scope

Since the last Population and Housing Issue Paper, published in May 2023, there have been changes that have influenced population and housing trends in HRM. These changes include:

- Changes in migration trends
- Impact of the Federal 2025-2027 Immigration Levels Plan<sup>1</sup> and allocation to Nova Scotia for the Provincial Nominee Program (PNP) and the Atlantic Immigration Program (AIP)
- Adjusted unit/density assumptions for the intensification areas
- Changes to the Planning framework

These changes have necessitated updating the Population, Housing and Capacity Assessment models.

As we continue to monitor trends and assess how changes to the planning framework affect housing delivery, we expect to learn where there are opportunities and constraints in various systems, and to use this information to inform future settlement patterns to best support sustainable infrastructure development. To that end, we expect the information contained in this report to be used in an ongoing and iterative process to inform land use and infrastructure decision-making.

This update is based on the methodology used in the [Original Issue Paper \(June 2021\)](#) and modifications contained in subsequent papers. However, the population and housing projections outputs have been updated to align with recent trends, while the capacity assessment incorporates changes to the intensification areas as well as assumed units and densities.

Refer to the following papers for more information on the methodology:

- Preliminary Population & Housing Analysis Technical Documentation Regional Plan Review ([June 2021](#)).
- Preliminary Housing and Population Issue (Supplementary Report) Paper ([December 2021](#)).
- Annual Evaluation of Population Scenarios Regional Plan Review ([May 2022](#)).
- Updated Population and Housing Issue Paper ([May 2023](#))

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<sup>1</sup> [Notice – Supplementary Information for the 2025-2027 Immigration Levels Plan - Canada.ca](#)

## 2.0 Background

### 2.1 Regional Plan

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). This is informed by the output of HRM's population and housing projections and capacity assessment models.

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.

### 2.2 Previous Issue Papers

#### 2.2.1 Original Issue Paper (June 2021)

In June 2021, Regional Planning released a ['Preliminary Population & Housing Analysis'](#). The goal of that Issue Paper was to understand the dynamic between the projected demand for housing and Halifax's land use capacity to accommodate residents in different housing types.

The paper identified three population scenarios that drove projected future demand for housing in the municipality. It then calculated capacity for new residential development in identified "Intensification Areas" and used three land use scenarios to compare the demand to the capacity.

The results of this analysis concluded that:

- a. there was regulatory capacity to accommodate overall population growth in the short to moderate term,
- b. based on the 2016 propensity to live in different housing types, there would continue to be high demand for ground-based units, while the majority of the capacity for new housing was in the form of apartment-style units, and
- c. that the development of the remaining Future Serviced Communities should be considered in the near term if Regional Council chooses to respond to the 2016 propensity for ground-based units.

#### 2.2.2 Supplementary Report (December 2021)

Regional Planning provided a supplementary report to the original Issue Paper in December 2021, to respond to some specific topics and questions identified: [\(Attachment D\) Preliminary Housing and Population Issue Paper: Supplementary Report](#).

This report has several sections:

- a. The first section identified an additional population scenario, based on new direction from the Provincial Government targeting 2 million people in Nova Scotia by 2060.
- b. The second section discussed the Regional Plan's role in directing future growth and explored the ways we grow: through infill and expansion.
- c. The third section provided information on the market's influence on housing conditions and identified a method of estimating a possible existing housing construction undersupply.

### **2.2.3 Re-evaluation of population scenarios (May 2022)**

After Statistics Canada had published new population data in early 2022 (for the year 2020/2021), staff published [\(Attachment L\) Annual Population Scenario Evaluation 2022](#). This report evaluated the assumptions made in the population scenarios and proposed adjusted scenarios based on new data.

### **2.2.4 Updated Population and Housing Issue Paper (May 2023)**

An [Updated Population and Housing Issue Paper](#) was published in May 2023 as part of Phase 4 of the Regional Plan Review, together with the release of the Draft Regional Plan. The report was necessitated by several changes that influence the population and housing analysis. These included:

- New data on population and housing published
- The addition of the 'Nova Scotia Targeted Migration' (NSTM) population scenario
- Adjusted population scenarios
- The estimation of a potential pre-existing construction undersupply
- Additional lands identified as intensification/growth areas
- Adjusted unit/density assumptions for the intensification areas

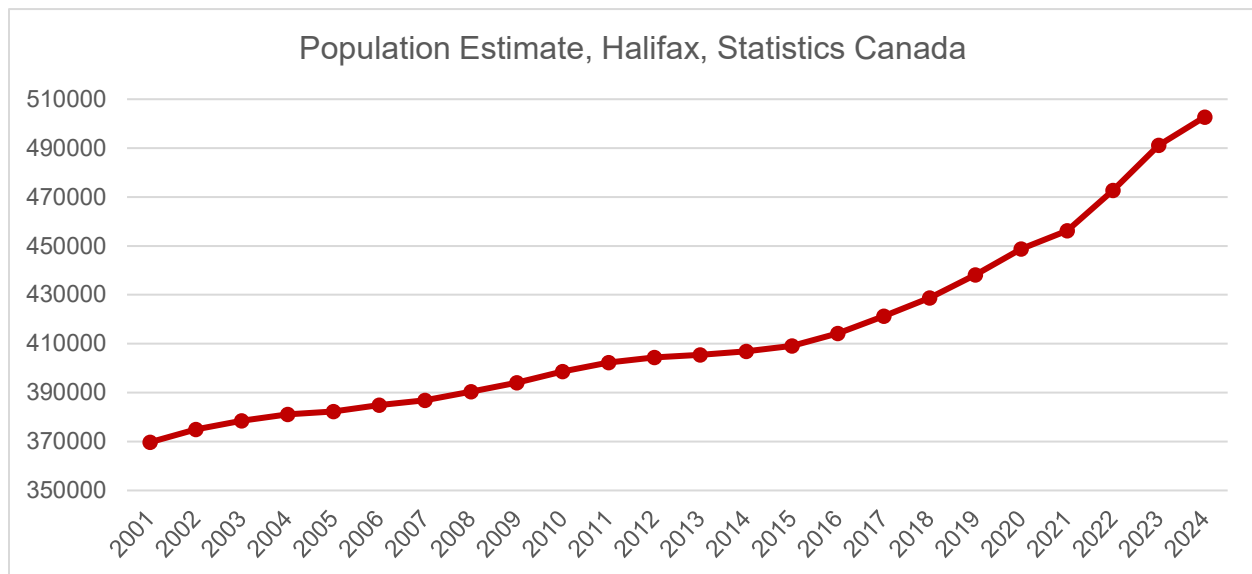
The goal of this report, released alongside the Draft Regional Plan, was to update the analysis from the original issue paper by incorporating the above-noted changes.

## 3.0 Recent Trends & Changes

### 3.1 Population

Halifax's population has been growing rapidly over the last years, but the growth rate between 2023 and 2024 was less than previous years. This trend is expected to continue over the short-term due to Federal immigration policy reducing expected immigration as outlined in the 2025-2027 Immigration Levels Plan and allocation to Nova Scotia for the Provincial Nominee Program (PNP) and the Atlantic Immigration Program (AIP).<sup>2 3</sup>

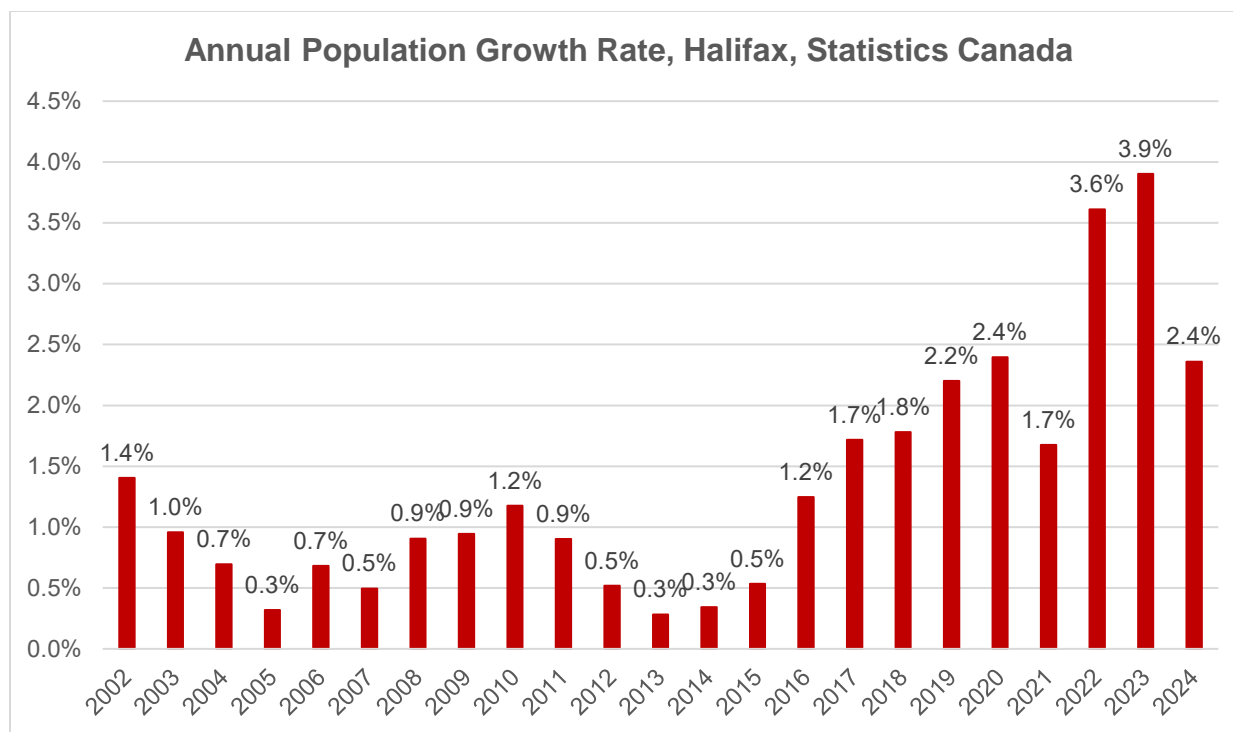
While migration has played a significant role in the population growth Halifax has recently experienced, recent figures indicate a slowing down. Negative values were observed for Net interprovincial migration and intraprovincial migration in 2023/2024, along with a significant downturn in Net non-permanent residents and slight increase in the number of emigrants. On the other hand, the number of immigrants and returning emigrants increased marginally. While this trend is expected to continue for Net non-permanent residents, due to Federal immigration policies, it is too early to determine if other types of migration will continue in the direction observed in 2024.



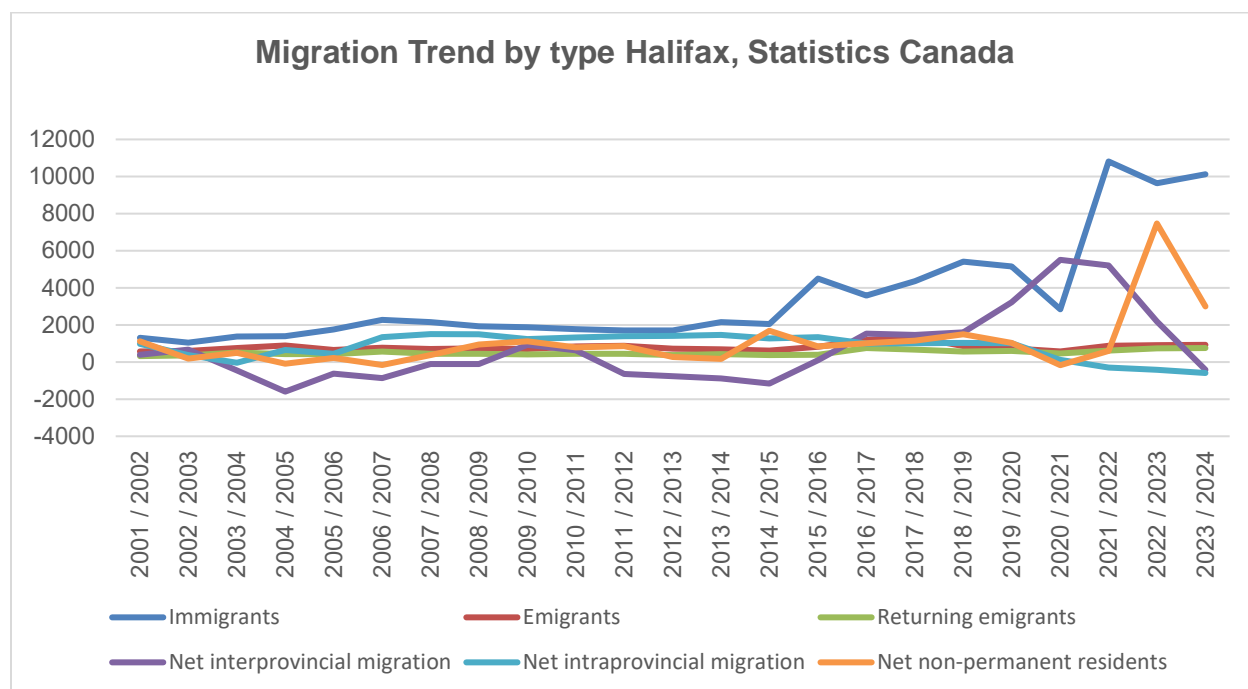
Source: Population estimates, July 1, by census subdivision, 2021 boundaries

<sup>2</sup> [Notice – Supplementary Information for the 2025-2027 Immigration Levels Plan - Canada.ca](#)

<sup>3</sup> [Provincial Nominee Program \(PNP\) Quota for 2025](#)



Source: Population estimates, July 1, by census subdivision, 2021 boundaries

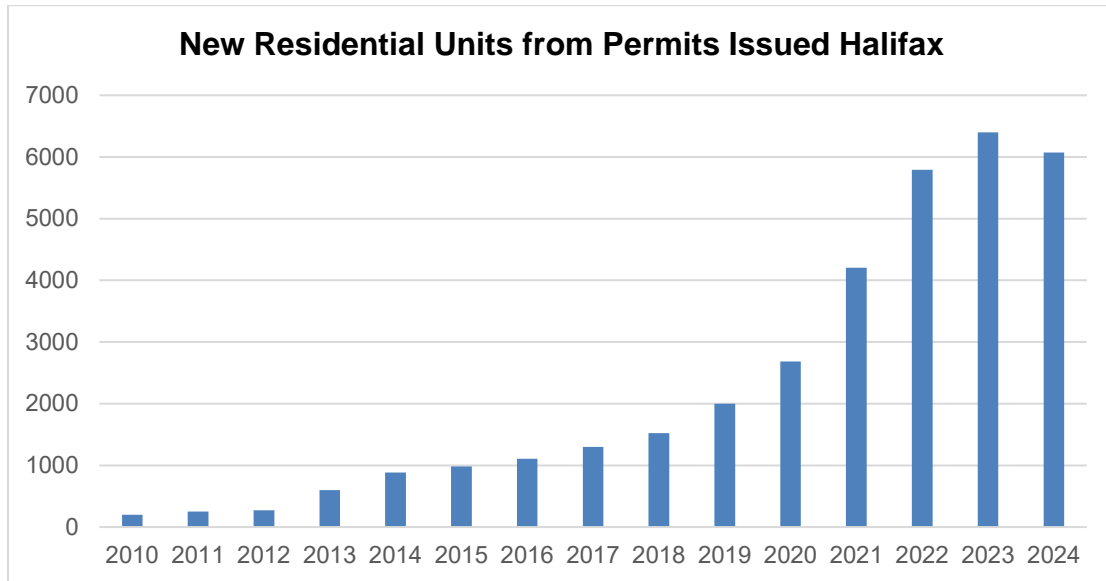


Source: Components of population change by census division, 2021 boundaries

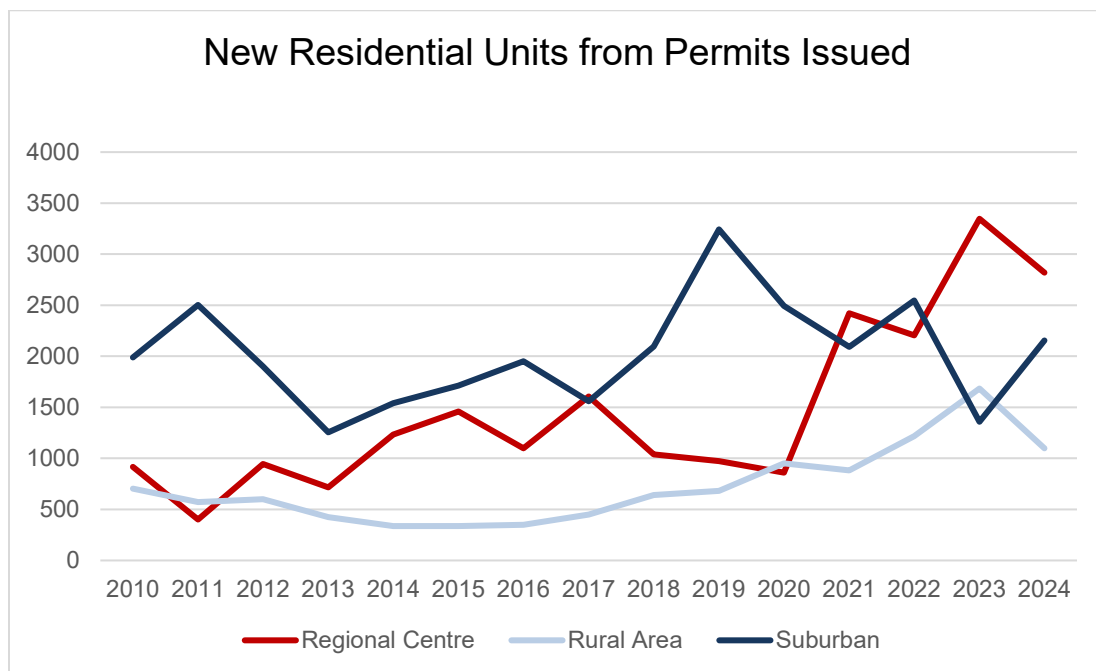


### 3.2 Housing

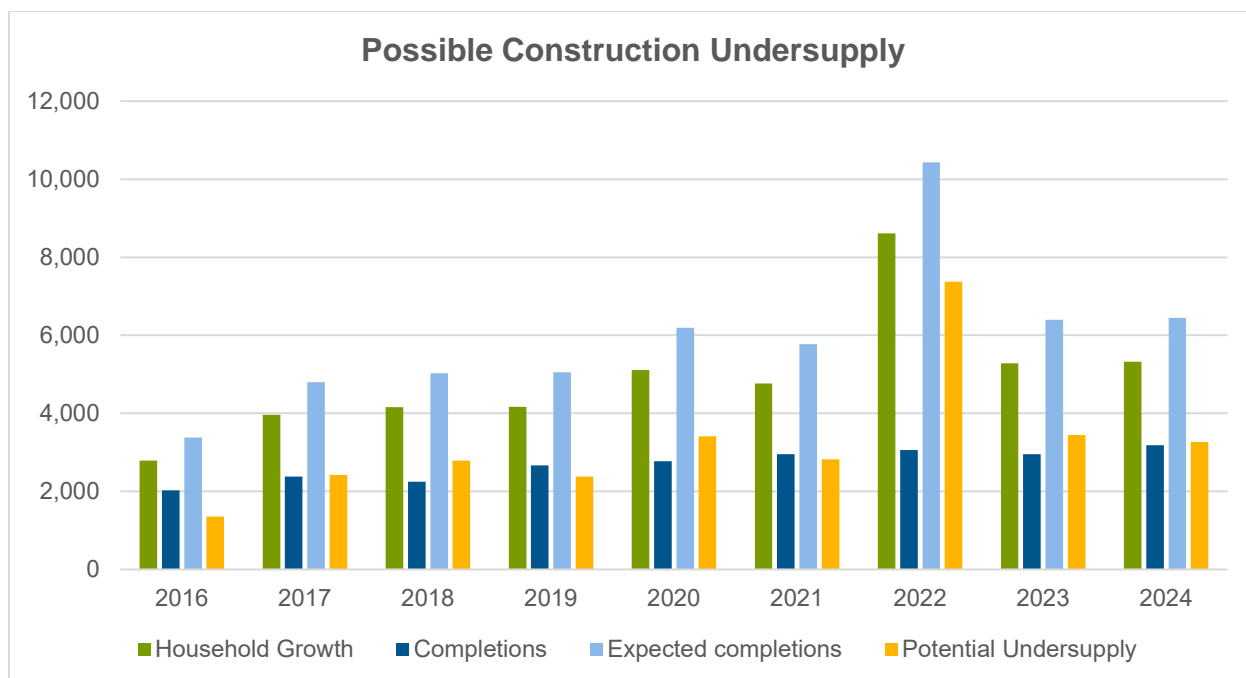
There has been a significant increase in the number of residential units that have started, as reflected by an increase in building permits issued. A considerable number of these buildings have been in the Regional Centre with the least in the Rural sub-region. This aligns with the intent of the Regional Plan to support intensification within the Urban Service Area boundary.



Source: HRM Permit Data



Source: HRM Permit Data



Source: P&D Analysis

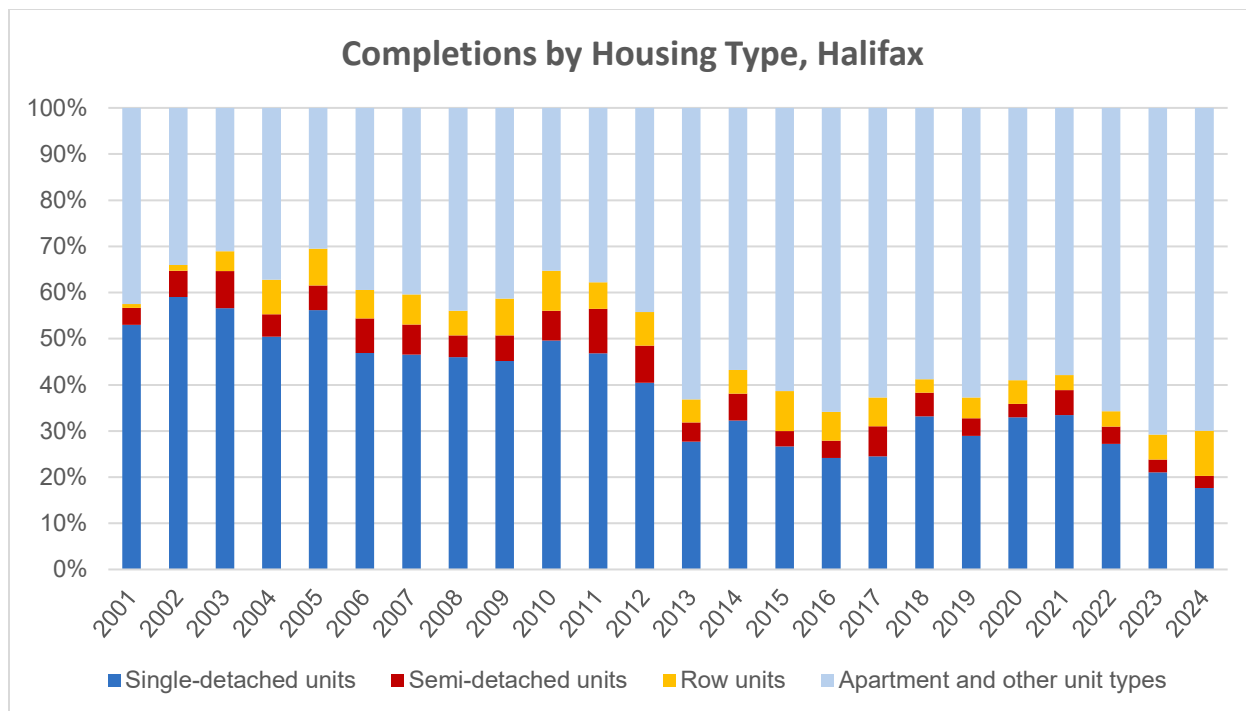
Despite the increase in the number of buildings starts, HRM continues to experience potential undersupply which increases the total amount of dwellings required to address housing supply shortage.<sup>4</sup> While it is a good sign that potential undersupply has been decreasing from the peak witnessed in 2022, there is still a lot of work to be done to get to the pre-2016 value, which is the last time the Region had a vacancy rate of 3% or above for rental properties.

### 3.3 Housing Type

The Regional Plan directs most new growth to areas where existing services and infrastructure are available and aims to ensure that a range of housing types, including apartment-style and ground-oriented units, are available in all communities.

As shown in the figure below, apartment-style units continue to make up most new units constructed in HRM, resulting in more households shifting into this housing type. This trend could be linked to the substantial urban infill development, which is largely driven by recent policy changes in the Regional Centre.

<sup>4</sup> Expected completion was calculated using the dwelling per household experienced in the 2006-2015 period and applying it to the 2016 – 2024 household growth. Kindly refer to [the Preliminary Housing and Population Issue Paper Supplementary report \(December 2021\)](#) for further details.



Source: Canada Mortgage and Housing Corporation, housing starts, under construction and completions in selected census metropolitan areas, annual Statistics Canada and Starts, Completions and Under Construction by Census Subdivisions Canada Mortgage and Housing Corporation

## 4.0 Updated Analysis

### 4.1 Population Scenarios

Having a range of scenarios allows HRM to envision different outcomes and assess how the existing planning framework is positioned to respond. This enables the Regional Plan to provide sufficient regulatory capacity in the housing system, thereby allowing the market to respond to demand.

As mentioned earlier, the population and housing projections outputs have been updated to reflect recent trends. These updates are summarized in table 1 below.

Table 1: Summary of assumptions<sup>5</sup>

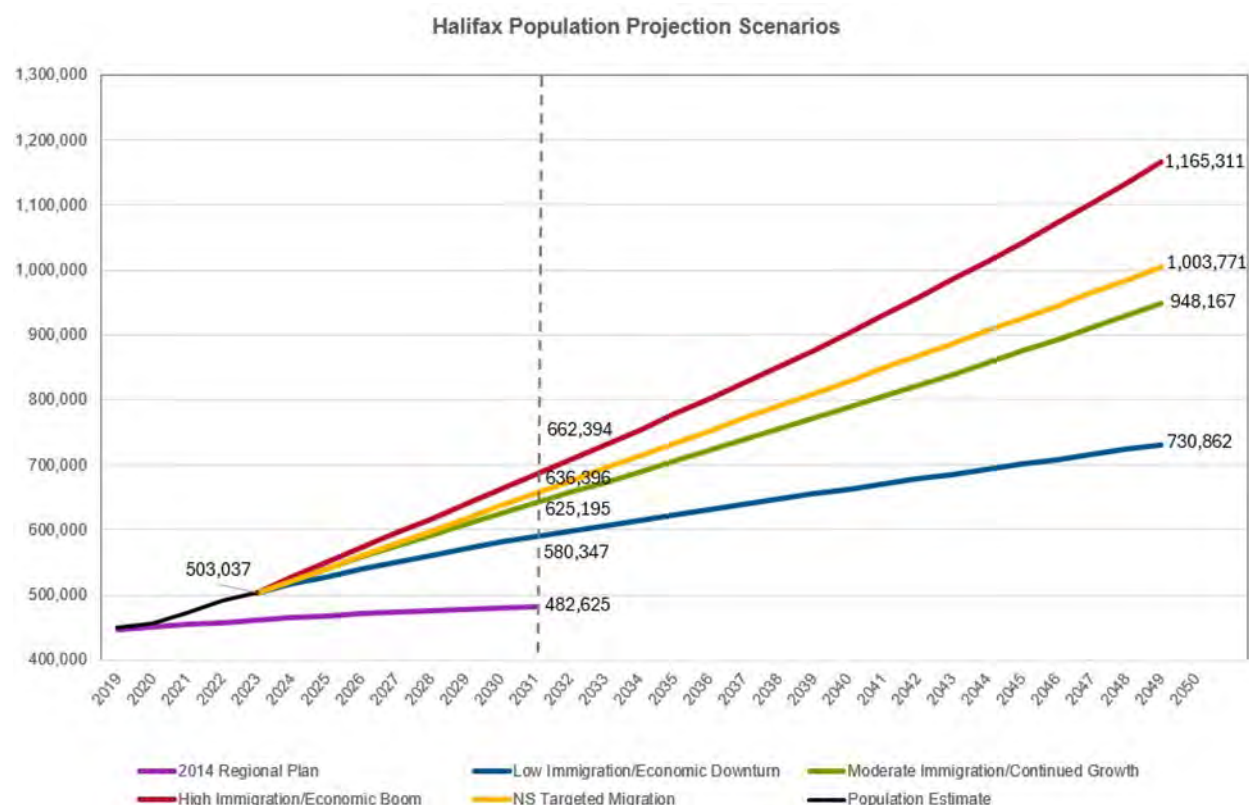
Updated Scenarios				
Scenarios	Low Immigration/ Economic Downturn	Moderate Immigration/ Continued Growth	High Immigration/ Economic Boom	NS Targeted Migration
Base Year	2024			
Fertility	Average age-specific rate 2021-2023, held constant			
Birth sex split	Average age-specific rate 2021-2023, held constant			
Mortality	Average age-specific rate 2021-2023, held constant			
NS Immigration	IRCC low range 2025-2027 Immigration Levels Plan + Statistics Canada Low Scenario	IRCC target 2025-2027 Immigration Levels Plan + Statistics Canada Medium Scenario	IRCC high range 2025-2027 Immigration Levels Plan + Statistics Canada High Scenario	15000 immigrants to NS annually
% Halifax Immigration of NS	Average 2021-2023, held constant (77 %)			
Emigration	Average rate 2021-2023, held constant			
Returning Emigrants	Average ratio 2021-2023, held constant			
Temporary Emigrants	Not included due to methodological changes by Statistics Canada <sup>6</sup>			
Interprovincial	Average rate 2011-2014, held constant	Average rate 2021-2023, held constant	Average rate 2019-2020, held constant	10,000 interprovincial migrants to NS Annually
Intraprovincial	Net zero	Average number 2016-2019, held constant	Moderate + (Moderate – Low)	Average number 2016-2019, held constant
NPR	Average 2021-2023, held constant			

<sup>5</sup> The blue colour indicates that no change was made.

<sup>6</sup> <https://www150.statcan.gc.ca/n1/pub/91-215-x/2023002/dq-qd-eng.htm>

Age split of each component of migration	Average percentage 2021-2023, held constant
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The graph below displays the updated scenarios as of March 2025. In the previous report, the NS Targeted Migration was the highest projection scenario, but it has been replaced by the High Migration/Economic Boom Scenario. This change is primarily due to adjustments in the projected number of immigrants, as the estimates provided by Statistics Canada were considerably higher than those used in the May 2023 report.<sup>7</sup>



Source: HRM population growth projection March 2025

<sup>7</sup> [Components of projected population growth, by projection scenario](#)

## 4.2 Housing Needs <sup>8</sup>

The tables below are the projected housing needs based on the updated population projections. The tables show the projected housing needs for all four scenarios for 2031 and 2050. It should be noted that the split by dwelling type is based on the CMHC completion data and not Housing Propensity which is derived from Statistics Canada 2021 Census data. Additionally, a 3% vacancy rate was included for multi-units because it is often referred to as a “healthy” vacancy rate which provides a balance between providing tenants with housing choice in the rental market and maintaining an incentive for the development community to invest in market housing.<sup>9</sup> The tables also provide information about the existing units as of March 2025, potential undersupply, and the number of dwellings required by the target years based on the population projection.<sup>10</sup>

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<sup>8</sup> While Housing Demand is a more commonly used term, from an economic standpoint, Housing Needs is considered more appropriate. From a demographic perspective, Housing Needs are influenced by factors such as population growth, aging populations, and household formation rates. Housing Demand, on the other hand, refers to the desire and ability of households to purchase or rent housing in the market. It is driven by economic factors including income level, interest rates, property taxes, changes to the housing stock, and housing demand etc. There has also been an argument to use Housing Requirements instead of Housing Needs to avoid confusion with the Core Housing Needs concept. Refer to this paper for more detailed discussion [CUR\\_housing\\_definitions\\_2023.pdf](#) on this issue.

<sup>9</sup> Henderson, J. (2019, November 15). AirBnBs increase housing costs for everyone, says urban planning prof. Halifax Examiner. Retrieved from [AirBnBs increase housing costs for everyone, says urban planning prof - Halifax Examiner](#).

<sup>10</sup> Potential undersupply and remaining demand by dwelling type are based on CMHC completion data from 2006 to 2015, which had an average completion rate of 53% for ground-based dwellings and 47% for apartments. However, recent figures indicate a higher completion rate for apartments, reaching as high as 70% in 2024.

2031						
Scenario	Unit Type	Demand	Existing Units (2025 March)	Potential Undersupply	Vacancy	Remaining Demand
Low Immigration/ Economic Downturn	Total	255,968	217,976	29,264	0.03 for multi-unit only	70,199
	Ground-based	167,510	138,330	19,634		48,814
	Apartment	88,458	79,646	9,630	0.03	21,385
Moderate Immigration/ Continued Growth	Total	275,907	217,976	29,264	0.03 for multi-unit only	90,344
	Ground-based	180,559	138,330	19,634		61,863
	Apartment	95,348	79,646	9,630	0.03	28,482
High Immigration/ Economic Boom	Total	292,424	217,976	29,264	0.03 for multi-unit only	107,033
	Ground-based	191,368	138,330	19,634		72,672
	Apartment	101,056	79,646	9,630	0.03	34,361
NS Targeted Migration	Total	279,843	217,976	29,264	0.03 for multi-unit only	94,321
	Ground-based	183,134	138,330	19,634		64,438
	Apartment	96,708	79,646	9,630	0.03	29,883



2050						
Scenario	Unit Type	Demand	Existing Units (2025 March)	Potential Undersupply	Vacancy	Remaining Demand
Low Immigration/Economic Downturn	Total	333,500	217,976	29,264	0.03 for multi-unit only	148,535
Moderate Immigration/Continued Growth	Total	432,878	217,976	29,264	0.03 for multi-unit only	248,943
High Immigration/Economic Boom	Total	531,097	217,976	29,264	0.03 for multi-unit only	348,180
NS Targeted Migration	Total	453,958	217,976	29,264	0.03 for multi-unit only	270,241

## 4.3 Capacity

This paper retains the definition of capacity used in the July 2021 paper, which is “the ability for new housing supply to be built under existing or assumed regulations”.<sup>11</sup> This refers to general regulatory capacity, rather than individual sites or markets. Changes made since the publication of the 2023 Updated Population and Housing Issue Paper that directly impact the capacity assessment include the composition of the intensification areas, as well as the assumed units and densities. These changes are summarized below.

### 4.3.1 Updated Densities: Regional Centre Plan

A new methodology was developed to estimate densities based on potential built form in the Regional Centre designations (CEN, COR, DD, DH, and HOR) as part of the May 2023 Updated Population & Housing Issue Paper. However, in June 2024, these densities were adjusted to accommodate a mix of land uses (building heights and non-residential uses) and through comparing to similar contexts across Canada and North America. The revised density assumptions shown in Table 1 as “Updated Densities 2024/25” have been used in the updated capacity assessment analysis presented in this report.

<sup>11</sup> Population and Housing Issue Paper Technical Report, 2021. Available upon request.

Table 1: Centre Plan Densities

Designation	Abbreviation	Original Density 2021 (Units per acre)	Density 2023 (Units per acre)	Updated Densities 2024/25 (Units per acre)
Centre	CEN	75	203	130
Corridor	COR	36	93	70
Higher-Order Residential	HR	58	131	90
Downtown Dartmouth	D or DD	58	180	100
Downtown Halifax	DH	58	310	100

#### 4.3.2 Regional Centre Urban Structure Designation Changes

In May 2024, through the [Urgent Changes to Planning Documents for Housing](#) amendments, Regional Council approved establishing a new Centre Designation on Fenwick Street, Halifax, and a new Future Growth Node Designation in Woodside, Dartmouth in May 2024.

#### 4.3.3 Updated Densities: Suburban BRT Corridors

For this analysis, lands within the Suburban Area along proposed Bus Rapid Transit (BRT) corridors as identified in the *Rapid Transit Strategy* have been categorized using a similar Urban Structure framework as within the Regional Centre. It should be noted that while this section refers to “Designations”, these categories are based on preliminary assumptions developed for analysis purposes only, and do not reflect policy adopted by Regional Council.

Staff evaluated higher densities for the Suburban Areas as part of the May 2023 Updated Population & Housing Issue Paper. Further analysis comparing to current density levels in suburban areas and the Regional Centre determined that the assumptions may be higher than reasonable, and staff determined that the densities in the original 2021 issue paper were appropriate. Additionally, two different density levels for “Future Growth Nodes” were used recognizing different contexts for the designated areas (see Section 4.2.4 for further detail).

The revised density assumptions shown in Table 2 as “Updated Densities 2024/25” have been used in the updated capacity assessment analysis presented in this report.

Table 2: Suburban BRT Densities

Designation	Abbreviation	Original Density 2021 (Units per acre)	New Density 2023 (Units per acre)	Updated Densities 2024-25 (Units per acre)
Centre	CEN	58	203	58
Corridor	COR	36	93	36

Higher-Order Residential	HR	58	131	58
Suburban Future Growth Node 1	FGN (now FGN1)	40	76	40
Suburban Future Growth Node 2	FGN2	58	-	58

#### 4.3.4 Suburban BRT Corridor Designations – FGN1 and FGN2

Four areas that had previously been identified as potential Future Growth Nodes were reassessed:

- **Rockingham South** – Removed as an FGN because the development is approved, and most units are accounted for differently in the model (as approved/planned units) rather than through the applied density
- **Lacewood/Dunbrack** – Designated **FGN-2**
- **Mainland Commons** - Designated **FGN-1**
- **Dartmouth Crossing** – Designated **FGN-1**
- **Mill Cove FGN** – Applied an **FGN-2** and **CEN** designation to the Mill Cove area

#### 4.3.5 Updated unit assumptions in the Future Serviced Communities, Future Growth Nodes and other special project areas

There are a number of special project areas, including the Future Serviced Communities and Future Growth Nodes. All areas were reviewed to update with the most recent assumptions for these areas. A summary of changes made since the May 2023 issue paper is provided in Table 3 below.

Table 3: Updated Unit Assumptions for Future Serviced Communities, Future Growth Nodes and Other Special Project Areas.

Areas	Unit Assumptions and Rationale
<b>Future Serviced Communities</b>	Updated unit assumptions for Sandy Lake, Highway 102 West Corridor lands, and Morris Lake, to be consistent with the medium density scenario being used in the Future Serviced Communities study
<b>Centre Plan Future Growth Nodes</b>	Updated unit assumption for M District to reflect the developer's proposal Updated unit assumption for Woodside FGN based on the number included in the June 2024 allocation

<b>Regional Plan Phase 3 Site Specific Amendments</b>	Updated unit assumptions to reflect that the estimates for Exhibition Park and Bedford Commons were increased to reflect the developers' proposals
<b>Planned Growth Projects</b>	<p>Added Cogswell as a specific project with a particular unit count assigned, to reflect the new policy and zoning considered for this area.</p> <p>Added Paper Mill Lake as a specific project. This area was designated as a Provincial Special Planning Area in August 2024. The unit assumptions are based on the developer's proposal.</p>

#### 4.3.6 Updates to/ Commentary on the Scenarios

Since 2021, this analysis has been based on three land use scenarios to assess housing demand as it relates to capacity. In the original 2021 issue paper, through the May 2023 update, these scenarios identified growth targets and areas for growth as follows:

	<b>Growth Targets</b>	<b>Primary Areas for Growth</b>
<b>Scenario A</b>	Based on 2014 Regional Plan: 25% Rural 75% Urban Communities	Regional Centre Future Serviced Communities
<b>Scenario B</b>	Based on Integrated Mobility Plan: 10% Rural 50% Suburban 40% Regional Centre	Regional Centre Future Serviced Communities Suburban Rapid Transit Corridors Regional Plan Review Phase 3 amendments Planned Growth Projects
<b>Scenario C</b>	Based on Integrated Mobility Plan: 10% Rural 50% Suburban 40% Regional Centre	Regional Centre Future Serviced Communities Rapid Transit Corridors Regional Plan Review Phase 3 amendments Planned Growth Projects Urban Reserve Areas

This report continues to use these scenarios, with one change. The change, along with the rationale behind it, is discussed below.

#### **Akoma/ Westphal Urban Reserve (Change to Scenario B and C)**

The Akoma/Westphal Urban Reserve area had originally been accounted for only in Scenario C, due to its status as an Urban Reserve. Staff have been studying this area as part of the Future Serviced Communities study, and on August 6, 2024, the lands were designated as a provincial

Special Planning Area. Therefore, the lands will be included within Scenario B as well as C, together with other Future Serviced Communities.

### **Urban Reserve areas not included in Scenario C (No change)**

In previous iterations of the Issue Paper, two areas designated Urban Reserve were not included in the capacity analysis for Scenario C. This assumption is not changing, but additional detail is provided here for clarity.

- *Ragged Lake*: Because these lands are being studied for industrial lands only, they are not included within the housing capacity.
- *Purcells Cove Backlands*: A substantial portion of this Urban Reserve is now Shaw Wilderness Park, and other land is owned by HRM and the NS Nature Trust for nature conservation purposes. Prior to the designation of Shaw Wilderness Park, a Purcells Cove Feasibility Study explored options to the service the area, and it will be further studied in Regional Plan Review Phase 5 as part of the studies of all Urban Reserve areas to confirm past results and to determine land suitability for development. At this time, it has not been included in the housing capacity analysis. The configuration of the land (properties are narrow strips of land, rather than large land holdings) makes it difficult to assign a density at this time. Additional density may be assigned in future iterations of this analysis, as the Urban Reserve studies are undertaken.

### **Limitations and Future Refinement of Land Use Scenarios**

It should be noted that the land use scenarios are intended to identify major areas for growth, but do not account for all potential development. There are additional lands where development is currently permitted under the existing planning framework, either as-of-right or through policy-enabled processes (rezoning, development agreements), which are not captured in these scenarios. For example, the proposed Regional Plan has identified two potential future growth areas in the Suburban Area that have not yet been identified in this analysis (Tacoma Drive and Downsview Mall). Future iterations of this analysis will refine the scenarios to include or exclude areas, particularly in the Suburban Area as the Suburban Plan becomes more defined.

## **4.4 Results by Land Use Scenario**

### **4.4.1 Scenario A: 2014 Regional Plan**

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.

**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 areas, as well as the Future Serviced Communities.**



# SCENARIO A 2014 Regional Plan

## Growth Area

-  Special Planning Area (SPA)
-  Future Growth Node
-  Future Growth Node & SPA
-  Future Serviced Community
-  Future Serviced Community & SPA
-  Cogswell/Downtown Gateway
-  Centre
-  Corridor
-  Higher-Order Residential
-  Downtown
-  Downtown Halifax
-  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.



SCENARIO A: 2014 REGIONAL PLAN			Original Density Assumptions		Density Assumptions 2023		New Density Assumptions 2025	
Capacity			104,800		315,600		165,256	
Horizon Year	Population Scenario	Total Demand to Growth Areas	Capacity – Demand	How many times capacity to demand?	Capacity – Demand	How many times capacity to demand?	Capacity – Demand	How many times capacity to demand?
2031	Low	47000	57000	2.2	268000	6.7	118000	3.5
	Moderate	61000	44000	1.7	255000	5.2	104000	2.7
	High	72000	33000	1.5	243000	4.4	93000	2.3
	NSTM	64000	41000	1.6	252000	5.0	102000	2.6
2050	Low	100000	5000	1.0	215000	3.1	65000	1.7
	Moderate	168000	-63000	0.6	148000	1.9	-3000	0.99
	High	235000	-130000	0.4	81000	1.3	-70000	0.7
	NSTM	182000	-78000	0.6	133000	1.7	-17000	0.9

\*\*\*These numbers may not add up exactly due to rounding.



#### 4.4.2 Scenario B: The Next 10 Years

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 surrounding these routes.

**The primary difference between this scenario and Scenario A, is that by using the Integrated Mobility Plan 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 it accounts for the Regional Plan Review Phase 3 amendments, as well areas surrounding future proposed BRT routes and other transit corridors that were identified for possible intensification. The designations shown in the suburban areas are *potential draft designations* for the purposes of envisioning future housing capacity and are subject to change.**

## SCENARIO B

# The Next 10 Years

Growth Area & Potential Draft Growth Areas

-  Special Planning Area (SPA)
-  Future Growth Node
-  Future Growth Node & SPA
-  Future Serviced Community
-  Future Serviced Community & SPA
-  Cogswell/Downtown Gateway
-  Centre
-  Corridor
-  Higher-Order Residential
-  Downtown
-  Downtown Halifax
-  Suburban BRT Corridors Centre
-  Suburban BRT Corridors Corridor
-  Suburban BRT Corridors Higher-Order Residential
-  Suburban BRT Corridors Future Growth Node 1
-  Suburban BRT Corridors Future Growth Node 2
-  Site Specific Amendments to the Regional Plan (Phase 3)
-  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



SCENARIO B: THE NEXT 10 YEARS			Original Density Assumptions		Density Assumptions 2023		New Density Assumptions 2025	
Capacity			209,000		733,000		243,511	
Horizon Year	Population Scenario	Total Demand to Growth Areas	Capacity – Demand	How many times capacity to demand?	Capacity – Demand	How many times capacity to demand?	Capacity – Demand	How many times capacity to demand?
2031	Low	57000	152000	3.7	676000	12.9	188000	4.3
	Moderate	73000	136000	2.9	660000	10.0	171000	3.3
	High	87000	122000	2.4	646000	8.5	158000	2.8
	NSTM	76000	133000	2.7	657000	9.6	168000	3.2
2050	Low	120000	89000	1.7	613000	6.1	124000	2.0
	Moderate	202000	7000	1.0	531000	3.6	43000	1.2
	High	282000	-73000	0.7	451000	2.6	-37000	0.9
	NSTM	219000	-10000	0.95	514000	3.3	26000	1.1

\*\*\*These numbers may not add up exactly due to rounding.

#### 4.4.3 Scenario C: The Future

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 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.

**This scenario builds on Scenario B and allocates additional growth to the areas currently designated 'Urban Reserve' for the 2050-time horizon only.**



# SCENARIO C The Future

## Growth Area & Potential Draft Growth Areas

-  Special Planning Area (SPA)
-  Future Growth Node
-  Future Growth Node & SPA
-  Future Served Community
-  Future Served Community & SPA
-  Cogswell/Downtown Gateway
-  Urban Reserve
-  Centre
-  Corridor
-  Higher-Order Residential
-  Downtown
-  Downtown Halifax
-  Suburban BRT Corridors Centre
-  Suburban BRT Corridors Corridor
-  Suburban BRT Corridors Higher-Order Residential
-  Suburban BRT Corridors Future Growth Node 1
-  Suburban BRT Corridors Future Growth Node 2
-  Site Specific Amendments to the Regional Plan (Phase 3)
-  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



SCENARIO C: THE FUTURE			Original Density Assumptions		Density Assumptions 2023		New Density Assumptions 2025	
Capacity			250,000		773,000		281,264	
Horizon Year	Population Scenario	Total Demand to Growth Areas	Capacity – Demand	How many times capacity to demand?	Capacity – Demand	How many times capacity to demand?	Capacity – Demand	How many times capacity to demand?
2050	Low	120000	130000	2.1	653000	6.4	158000	2.3
	Moderate	202000	48000	1.2	571000	3.8	77000	1.4
	High	282000	-32000	0.9	491000	2.7	-3000	0.99
	NSTM	219000	31000	1.1	554000	3.5	60000	1.3

\*\*\*These numbers may not add up exactly due to rounding.

		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 <b>Rapid Transit Corridors</b>		Regional Centre Future Serviced Communities Rapid Transit Corridors <b>Urban Reserve</b>	
Capacity (Housing Units)		165,256	 10,450  154,806	244,558	 21,862  222,696	278,723	 43,330  235,939
Demand Allocated to Intensification Areas	Low Immigration & Economic Downturn Demand Scenario	2031	47,384  28,018  19,367	56,861  36,494  20,367			
		2050	100,261	120,212	120,313		
	Moderate Immigration & Continued Growth Demand Scenario	2031	60,982  35,098  25,884	73,179  46,007  27,172			
		2050	168,036	201,644	201,644		
	High Immigration & Economic Boom Demand Scenario	2031	72,247  40,963  31,284	86,697  53,888  32,809			
		2050	235,021	282,026	282,026		
	NS Target Migration Demand Scenario	2031	63,667  36,49  27,171	76,400  47,885  28,515			
		2050	182,417	218,895	218,895		

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

 = Apartment Units

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

## 5.0 Conclusions & Next Steps

This report presents the results of a point-in-time analysis, aimed at helping residents, Regional Council, and staff of Halifax Regional Municipality understand recent population and housing trends in Halifax. By thoroughly examining recent trends and policy adjustments, we identified several critical insights that guide our understanding of the region's future development trajectory.

The report reveals that HRM has improved its ability to accommodate projected population growth and promote diverse housing options by utilizing zoning adjustments and strategic planning initiatives, such as the Centre Plan and Suburban Rapid Transit Corridors. However, the next 10-year and future scenarios reveal that if HRM grows at the rate indicated in the NS Targeted Migration and High Migration/Economic Boom scenarios, there might be challenges in meeting the housing demand by 2050 if no further policy changes are considered.

This calls for concerted efforts across the board to overcome existing challenges. This includes aligning infrastructure development with housing expansion and navigating regulatory complexities to expedite construction processes. Additionally, the discrepancy between permits issued and completions highlights the need to address barriers to construction and promote efficient development practices.

Moving forward, collaborative action among stakeholders is essential to capitalize on the region's growth opportunities and address housing challenges effectively. Ongoing dialogue and coordination between policymakers, developers, and community stakeholders will be crucial to ensure housing initiatives align with broader regional goals of sustainability and inclusivity.

Given the dynamic nature of population growth and the planning system, this process should be considered iterative in nature. The Regional Plan Review and the Suburban Plan process will continue to identify additional lands that are capable of accommodating new housing. These areas will be included in future iterations of this analysis as the Suburban Plan process progresses. Adjustments to include or exclude areas in this analysis may continue as the Regional Plan Review evaluates future growth scenarios and the Suburban Plan becomes more defined.

Furthermore, Planning & Development staff will continue to monitor trends and analyze how changes to the planning framework impacts housing delivery. New insights will be continuously communicated to residents, Council, and staff in line with the Municipality's commitment to evidence-based decision-making.