



**REPORT TO PLANNING AND TRANSPORTATION COMMITTEE  
MEETING OF WEDNESDAY, JULY 22, 2009**

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**SUBJECT:**     **REPORT ON A CONTEXT FOR CHANGE MANAGEMENT IN THE CAPITAL REGIONAL DISTRICT; FUTURE POPULATION, LABOUR FORCE, EMPLOYMENT AND HOUSING IN THE CAPITAL REGIONAL DISTRICT**

**PURPOSE:**

To transmit and present the Regional Growth Strategy/Regional Sustainability Strategy Project (RGS/RSS) background report titled *A Context for Change Management in the Capital Regional District*, prepared by Urban Futures.

**BACKGROUND:**

Regional Planning commissioned a comprehensive population and demographic study as part of the initial phase of the RGS/RSS review project (Attachment One).

The report reviews historical trends in regional population, employment and housing within the Capital Regional District (CRD) and provides a set of trend-based long-range projections of change for the region to 2038. The report begins with the consideration of national and provincial demographic characteristics and growth trends and discusses their implications for this region. The regional population projections consider the components of growth including the birth and death rates, migration trends and the age structure within this region. The report utilizes the population projections and demographic profile to project changes in the labour force, employment, and housing demand.

An important consideration for the RGS/RSS was to examine not only regional growth projections, but the projected population and demographic changes in the three sub-regions: the Core, Peninsula, and WestShore communities.

The provincial legislation requires the Regional District to include population projections in a regional growth strategy, covering at least a 20-year time horizon. In addition to meeting this statutory requirement, the demographic study provides important context to all aspects of local government planning, including transportation, facilities, and infrastructure planning. The document will be transmitted (electronically) to the municipal clerks, members of the Development and Planning Advisory Committee (DPAC), First Nations/Nations administrators, and the Roundtable on the Environment, and posted to the Regional Planning website.

**GROWTH MANAGEMENT & SUSTAINABILITY IMPLICATIONS**

The implications of this report for future planning and more specifically for the development of the Regional Sustainability Strategy are significant. The authors of the report deliberately titled the report “A context for *change management*” as opposed to *growth management* to reflect the significant demographic changes projected for this region – namely, the aging of the baby boomer population. The demographic projections show the population will grow larger over the coming three decades, but at a much slower annual rate than has been seen historically. Over the coming three decades the region’s population is projected to increase from 364,000 residents today (2008) to 390,000 by 2016 and to 475,000 residents by 2038. Growth of 111,000 new residents over the projection period, or 31%, compares to the past three decades which saw the CRD grow by more than 125,000 residents or by 54%.

Of significance to regional and local planning is the projected change in the resident population, not the growth of it. By 2038, the population aged 65 and older is projected to increase by 75,600 people, compared to only 27,500 people being added to the working aged population (aged 15 to 64). For every person added to the working aged population over the next three decades, 2.8 seniors will be added to

the regional population. The extent of this change will affect everything from labour supply, demand for healthcare services (and the ability to find staff to provide them), transportation demands (less commuter-oriented) to community design (accessibility, changing housing preferences).

The region's labour force is expected to grow from 205,224 participants today to 246,824 by 2038. This is an increase of 41,000 over the next 30 years reflecting an average annual growth rate of only 0.6% per year. The report authors noted that the region may face a future where the number of workers in the region starts to constrain the ability of its economy and employment to grow.

Changing demography will also have an impact on housing growth and preferences in the region. The report projects a 35% - 62,836 additional housing units over the next 30 years. While ground-oriented units (e.g., single-detached, townhome, duplex) will remain the dominant housing form, the demand for apartment units will increase significantly. The apartment segment of the market is projected to grow by 50% - or 25,545 units. Ground oriented units are projected to increase by 34% over current stock, requiring an additional 37,292 units.

Using a trend-based projection (i.e., it is derived from past trends; it is not destiny) the authors project very different growth rates across the three sub-regions. Of the 111,000 person growth projected for the CRD (a 31% increase) as a whole, the WestShore sub-area would see the most significant change over the next 30 year – growing by 88% and adding 57,000 new residents by 2038. The Core is projected to grow to 280,000 by 2038 – and increase of 15% or 37,360 new residents. The Peninsula is projected to grow by 25% - resulting in an increase of just 10,380 people. This pattern of growth would see the WestShore increase its share of regional population from 18 percent in 2008 to 26 percent by 2038. The Core, however, would see its share decline from 67 to 59 percent, while the Peninsula is expected to maintain its 11 percent share.

### **FINANCIAL IMPLICATIONS**

Development of the regional population and demographic study was funded through the Regional Growth Strategy planning budget.

### **SUMMARY/CONCLUSIONS**

The key findings of the study will provide useful input to the 5-year review of the Regional Growth Strategy. The key statistics and projections are as follows:

- 364,108** – 2008 regional population
- 475,163** – 2038 projected regional population
- 111,000** – 2008-2038 increase (31%)
- 3,700** – Average annual population increase to the region as a whole
- 1.0%** - Current annual regional growth rate
- 0.6%** - Annual growth rate projected for 2038
- 53,726** – New dwelling units required between 2008 and 2038
- 1,800** – Average number of new dwelling units required annually across the region

### **RECOMMENDATION**

That the report, *A Context for Change Management in the Capital Regional District*, be received.

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Tracy Corbett, MCIP  
Senior Manager Regional Planning

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Robert Lapham, MCIP  
General Manager, Planning and Protective Services