



# ONE MILLION NEW ONTARIANS

WHERE THEY ARE LIVING AND HOW THEY GOT THERE

FEBRUARY 2022



**Smart Prosperity  
Institute**

## Acknowledgements

This report was written by Mike Moffatt, with funding from Ontario's Big City Mayors (OBCM). Responsibility for the final product and its conclusions is Smart Prosperity Institute's alone and should not be assigned to the reviewers, interviewees, or any external party. Being interviewed for or reviewing this report does not mean endorsement, and any errors remain the authors' responsibility.

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Ontario's Big City Mayors (OBCM) is comprised of mayors of Ontario cities with populations of 100,000 or more. Collectively, Ontario's Big City Mayors represent nearly 70% of Ontario's population.

OBCM provides a voice for big city mayors in policy debates that impact Ontario cities. Through policy development, advocacy, discussion and partnerships, Ontario's Big City Mayors support strong and effective cities.

# ONE MILLION NEW ONTARIANS

## Executive summary

From the middle of 2015 to the beginning of the pandemic, Ontario underwent a population boom, while housing completions rose only marginally. This mismatch between housing demand from demographic change and housing supply contributed to the rise in housing prices and the increase in the number of families moving in search of housing they could afford before the pandemic while also creating the conditions for the home price boom experienced during the pandemic.

In the five-year period between July 1, 2015, and July 1, 2020, Ontario's population grew by over a million people; in the previous five years, it grew by less than 600,000. This increase was due to a combination of an international student boom, an increased number of immigrants calling Ontario home, as well as Canadians, moving to Ontario after oil prices crashed, as shown by Figure 1.

Figure 1: Ontario's Population Growth by Source, 5 Year Periods<sup>1</sup>

Source	2010-15	2015-20	Change
Net Non-Permanent Residents (International Workers and Foreign Students)	68,135	284,142	216,007
Net Immigration <sup>2</sup>	387,916	544,824	156,908
Net Interprovincial (Between Provinces)	-51,778	41,826	93,604
Other (Births, Deaths, etc.)	167,067	167,082	735
<b>TOTAL</b>	<b>571,340</b>	<b>1,038,594</b>	<b>467,254</b>

The 2015-20 period saw accelerated population growth in communities with higher education centres, such as London, Hamilton, and Waterloo. It also saw substantial growth in the number of *drive into you qualify* families moving into communities such as Barrie, Kitchener, and Guelph. Accelerated population growth created demographic-based demand for over 430,000 housing units to be created across Ontario; nearly 100,000 more than were built.

Policymakers must address this mismatch between demographic-based housing demand and new housing supply. Most pressing is the need for family-friendly, climate-friendly housing within Ontario's biggest cities. Increasing the supply of family-friendly housing can be accomplished through policies designed to build more of those homes. It can also be accomplished through policies to build more student-friendly and graduate-friendly housing, or more senior-friendly housing, to create additional housing options for those groups, allowing existing family homes to be put onto the market.

<sup>1</sup> Source: Moffatt (2021a).

<sup>2</sup> *Net Immigration* is calculated as new immigrants minus new emigrants plus returning emigrants minus temporary emigration.

# ONE MILLION NEW ONTARIANS

## Ten key points from this report

1. Ontario has experienced accelerated population growth in recent years. In the five-year pre-pandemic period between July 1, 2015, to July 1, 2020, Ontario's population grew by over one million persons. In the five years preceding that, it grew by less than 600,000.
2. The province's accelerated population growth was partly due to an increase in immigration, partly due to Canadians moving to the province after the end of the oil boom, but primarily due to a sudden and rapid growth in international students and graduates working in Canada under the Post Graduate Work Permit Program (PGWPP). An increase in non-permanent residents, primarily international students and graduates, accounts for nearly half of Ontario's population growth acceleration.
3. This increase in non-permanent residents, who often eventually gain permanent residency, was not evenly spread across Ontario. While many moved to the Greater Toronto Area (GTA), others were in communities such as London, Windsor, Waterloo, and other higher education centres.
4. This increase in population, from all sources, caused a growth in housing demand across the province. Using household headship rates from the 2016 Census, we estimate that Ontario's one-million-person population increase from 2015-20 created the demand for 430,000 housing units during that period. Unfortunately, only 330,000 housing units were completed (up only marginally from 2010-15), creating an excess demand of approximately 100,000 units during this time.
5. This mismatch between housing demand and supply led to an increase in *drive until you qualify* families. In 2015-20, on net, over 270,000 persons left Toronto, Peel, and York census divisions and moved to other parts of the province, up from 150,000 in the previous five years.
6. In 30 of Ontario's 49 census divisions, the most significant single net component of population growth is intraprovincial migration, that is, people moving in from other parts of Ontario.
7. There is an urgent need for more family-friendly housing options in our cities. There are three channels with which those options can be created.
8. The first channel to create more family-friendly housing options in our big cities is simply building more of them.
9. The second channel is to increase the number of student and graduate-friendly housing options, which can slow or reverse the conversion of family homes to student rentals.
10. And the final channel is to increase the number of senior-friendly housing options to accelerate the generational turnover of existing family-sized homes.

# ONE MILLION NEW ONTARIANS

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## Introduction: In the five years before the pandemic, Ontario's population boomed, leading to a surge in demand for housing

Ontario's housing shortage and skyrocketing home prices have caught the world's attention. While the most significant price increases have been experienced during the COVID-19 pandemic, the roots of the shortage can be traced to 2015. Between July 1, 2015, and June 30, 2020, Ontario's population surged, while housing completions experienced only a modest increase, as shown by Figure 2.

Figure 2: Net Population Growth and Gross Housing Completions for Ontario, 2010-15 and 2015-20.<sup>3</sup>

	2010-15	2015-20	% Difference
Population Growth (# of Persons)	571,340	1,038,594	81.8%
Housing Completions (# of Units, all Types)	313,995	332,598	5.9%

A growing population that lacks the infrastructure, including housing, to support that growth will lead to housing shortages, high prices, and families moving across the province searching for housing, known as *drive until you qualify*<sup>4</sup>. This shortage naturally leads to two questions: Why did Ontario's population grow so quickly, and why were housing completions unable to keep up? An earlier report from the Smart Prosperity Institute, titled *Forecast for Failure*,<sup>5</sup> examines the latter question. This report focuses on the former question of why Ontario's population growth accelerated after 2015. Specifically, it answers the following three questions:

1. Why did Ontario's population growth levels suddenly rise in 2015?
2. Where in Ontario did population growth occur?
3. How did this population growth affect the demand for housing?

As our goal is to understand better the pre-pandemic population dynamics that led to Ontario's housing shortage, we will confine our analysis to the period ending June 30, 2020.

The paper ends by reiterating the need for family-friendly, climate-friendly housing within Ontario's big cities. There are three channels that we can find more places for Ontario families to call home within our cities:

1. By increasing the number of family-sized homes within our cities.
2. By increasing the number of student and graduate-friendly housing options, which can slow or reverse the conversion of family homes to student rentals.

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<sup>3</sup> Sources: Population Growth - Statistics Canada, Table: 17-10-0139-01; Housing Completions - Statistics Canada, Table: 34-10-0135-01. Note: Population and housing completions are measured as of July 1 each year. 2015-20 figure reflects change in population and gross housing unit completions between July 1, 2015 and July 1, 2020

<sup>4</sup> As explained by CMHC (2019), "The expression drive until you qualify has become popular in recent years. It refers to the response households have had to rising home prices. Because of rising prices, many households can't afford to buy homes in the urban, central sectors of their cities. Households therefore drive further and further... until they find housing they can afford (and a mortgage they can qualify for)."

<sup>5</sup> Moffatt and Atiq (2022).

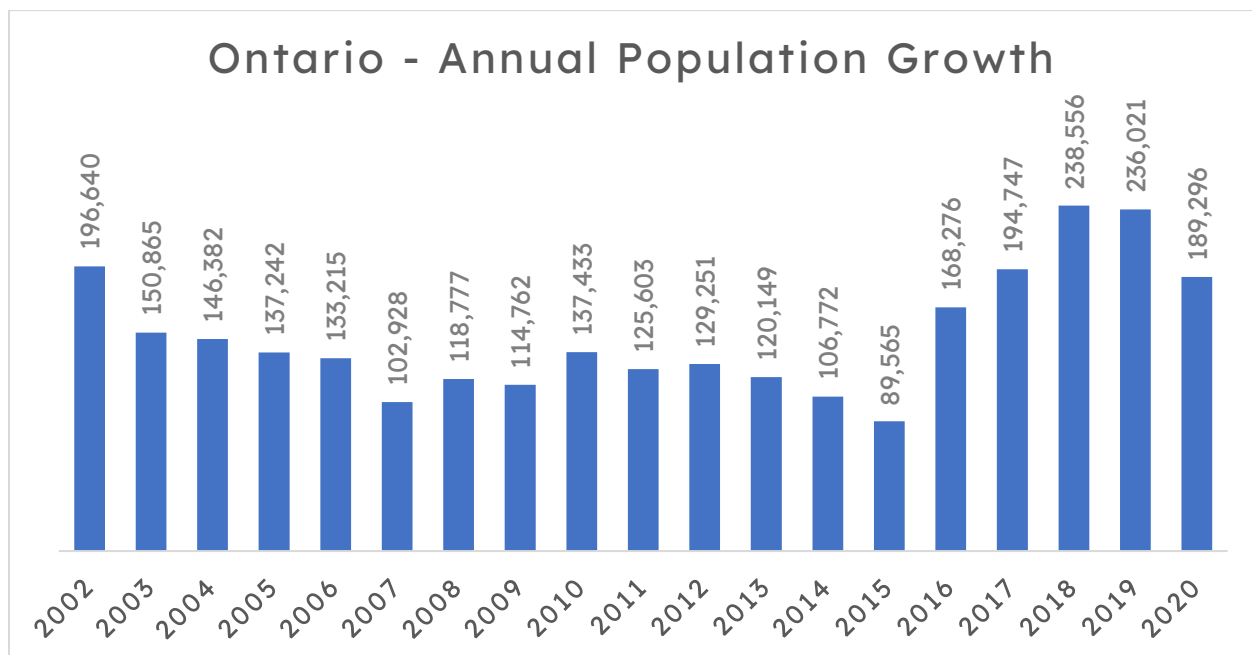
3. By increasing the amount of seniors-friendly housing, which will give existing homeowners more ability to downsize and accelerate the generational turnover of existing family-sized homes.

Given the existing shortage of housing options within our cities and forecasted population growth, it is vital to increase housing options for families within those cities. But first, we need to understand why Ontario's population is growing so quickly in the first place.

### Ontario grew by over one million people over five years, after growing by less than 600,000 the previous five

Outside of a slight dip in 2015, Ontario's population grew quite consistently from 2006-15, with the population growing, on average, by about 120,000 persons per year. These dynamics changed suddenly in 2016, and over the past five years, the province's population has grown, on average, by over 200,000 persons per year, as shown by Figure 3.

Figure 3: Ontario's Net Population Growth Per Year, 2001-2020.<sup>6</sup>



Ontario added, on net, 571,340 people in the five years of 2010-15. In the following five years, the province added over one million. This change in population growth was not evenly distributed, as shown by Figure 4, which examines population growth in 2015-20 relative to 2010-15 for Ontario's 29 largest municipalities. Of those 29 municipalities, 25 saw larger absolute levels of population growth from 2015-

<sup>6</sup> Source: Moffatt (2021a). Note: Population is measured as of July 1 each year. 2020 figure reflects change in population between July 1, 2019 and July 1, 2020.

20 compared to 2010-15. The populations of all 29 grew between 2015 and 2020, whereas between 2010 and 2015, Chatham-Kent and Thunder Bay saw their populations shrink. Centres outside the 29 largest municipalities saw their populations grow by a combined 250,988 persons in 2015-20, well over double the growth experienced in 2010-15.

Figure 4: Population Growth for Ontario's 29 Largest Municipalities, Sorted by 2020 Population, for 2010-15 and 2015-20 Periods.<sup>7</sup>

<b>Municipality</b>	<b>2010 Pop</b>	<b>2020 Pop</b>	<b>2010-15 Growth</b>	<b>2015-20 Growth</b>	<b>Difference</b>
Toronto	2,675,210	2,990,856	123,226	192,420	69,194
Ottawa	898,462	1,046,260	49,999	97,799	47,800
Mississauga	730,264	772,227	8,859	33,104	24,245
Brampton	526,582	712,502	70,147	115,773	45,626
Hamilton	532,232	583,354	15,042	36,080	21,038
London	375,329	430,906	13,611	41,966	28,355
Markham	306,761	349,775	29,276	13,738	-15,538
Vaughan	290,508	330,994	22,818	17,668	-5,150
Kitchener	223,411	268,178	11,914	32,853	20,939
Windsor	217,358	233,779	4,834	11,587	6,753
Richmond Hill	188,352	208,237	11,699	8,186	-3,513
Oakville	185,903	217,709	10,398	21,408	11,010
Burlington	178,492	193,620	7,988	7,140	-848
Greater Sudbury	164,737	169,012	749	3,526	2,777
Oshawa	152,286	179,583	8,862	18,435	9,573
Barrie	139,465	152,105	4,859	7,781	2,922
St. Catharines	135,043	141,973	855	6,075	5,220
Guelph	124,286	145,584	8,485	12,813	4,328
Cambridge	129,248	142,231	3,480	9,503	6,023
Whitby	124,463	140,860	6,819	9,578	2,759
Kingston	125,943	135,754	635	9,176	8,541
Ajax	110,578	132,544	11,349	10,617	-732
Milton	81,929	134,908	27,900	25,079	-2,821
Thunder Bay	111,523	112,511	-679	1,667	2,346
Waterloo	102,283	122,617	3,665	16,669	13,004
Chatham-Kent	107,081	106,652	-2,964	2,535	5,499
Brantford	95,720	106,699	3,500	7,479	3,979
Clarington	85,741	102,218	7,316	9,161	1,845
Pickering	91,166	101,424	2,468	7,790	5,322
<b>29 Big Cities</b>	<b>9,210,356</b>	<b>10,465,072</b>	<b>467,110</b>	<b>787,606</b>	<b>320,496</b>
<b>Rest of Ontario</b>	<b>3,925,422</b>	<b>4,280,640</b>	<b>104,230</b>	<b>250,988</b>	<b>146,758</b>
<b>TOTAL - ONTARIO</b>	<b>13,135,778</b>	<b>14,745,712</b>	<b>571,340</b>	<b>1,038,594</b>	<b>467,254</b>

<sup>7</sup> Source: Statistics Canada, Table: 17-10-0005-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

While Figure 4 can tell us how much the population grew, it cannot explain why. Breaking population growth into its various components is necessary to determine why a place grew. Unfortunately, this data is not currently available at a municipal level. It is, however, available at the census division level for each of Ontario's 49 census divisions.<sup>8</sup> For the remainder of this report, we will examine population dynamics at the census division level, noting that the four census divisions of Toronto, Ottawa, Hamilton, and Chatham-Kent have identical boundaries to their municipalities and are thus interchangeable.

Simultaneously examining 49 census divisions is unwieldy, so we divide the census divisions into the following three groups:

**Group 1:** 19 census divisions that saw their populations grow by 2,500 persons or more in each of 2010-15 and 2015-20. The 19 are Brant, Dufferin, Durham, Essex, Halton, Hamilton, Lanark, Middlesex, Niagara, Northumberland, Ottawa, Oxford, Peel, Prescott and Russell, Simcoe, Toronto, Waterloo, Wellington, and York.

**Group 2:** 17 census divisions that saw their populations grow by 2,500 persons or more in 2015-20 but grew by less than 2,500 in 2010-15. The 17 are Bruce, Chatham-Kent, Elgin, Frontenac, Greater Sudbury, Grey, Haldimand-Norfolk, Hastings, Huron, Kawartha Lakes, Lambton, Leeds and Grenville, Muskoka, Perth, Peterborough, Renfrew, Stormont, Dundas and Glengarry.

**Group 3:** 13 census divisions that saw their populations grow by less than 2,500 persons in each of 2010-15 and 2015-20. The 13 are Algoma, Cochrane, Haliburton, Kenora, Lennox and Addington, Manitoulin, Nipissing, Parry Sound, Prince Edward, Rainy River, Sudbury, Thunder Bay and Timiskaming.

Not surprisingly, Group 1 contains all of Ontario's largest census divisions. Group 1 also contains the smaller but rapidly growing Lanark, Dufferin, Prescott and Russell, and Northumberland census divisions, as shown by Figure 5. The census divisions in Figure 5 are sorted by the largest difference in population growth between 2010-15 and 2015-20. Only York census division experienced slower population growth, in absolute terms, in 2015-20 relative to 2010-15.

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<sup>8</sup> In Ontario, a Census Division is typically a regional municipality, a county, or, in northern Ontario, a district.

Figure 5: Population Growth for Ontario's 19 Group 1 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>9</sup>

Census Division	2010 Pop	2020 Pop	2010-15 Growth	2015-20 Growth	Difference
Peel	1,317,548	1,561,751	84,613	159,590	74,977
Toronto	2,675,210	2,990,856	123,226	192,420	69,194
Ottawa	898,462	1,046,260	49,999	97,799	47,800
Waterloo	517,826	605,611	24,208	63,577	39,369
Middlesex	450,142	510,738	13,640	46,956	33,316
Simcoe	454,268	538,775	30,003	54,504	24,501
Hamilton	532,232	583,354	15,042	36,080	21,038
Durham	619,314	713,826	37,645	56,867	19,222
Niagara	441,873	481,938	11,690	28,375	16,685
Essex	400,207	428,157	7,584	20,366	12,782
Halton	506,518	611,396	48,329	56,549	8,220
Wellington	213,280	244,348	12,171	18,897	6,726
Oxford	107,839	122,686	4,615	10,232	5,617
Brant	139,039	152,526	4,057	9,430	5,373
Lanark	67,000	74,456	2,571	4,885	2,314
Dufferin	58,051	68,378	4,222	6,105	1,883
Prescott and Russell	86,760	96,985	4,293	5,932	1,639
Northumberland	83,821	90,375	2,985	3,569	584
York	1,044,104	1,201,331	87,860	69,367	-18,493
<b>Group 1: Fast Growth Both Periods</b>	10,613,494	12,123,747	568,753	941,500	372,747

Our Group 2 census divisions, home to nearly 2 million Ontarians, experienced almost no population growth from 2010-15, as shown by Figure 6, though only 3 of the 17 experienced a population decline. In 2015-20, the group collectively added 88,592 persons to their population, over ten times the 2010-15 growth.

<sup>9</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

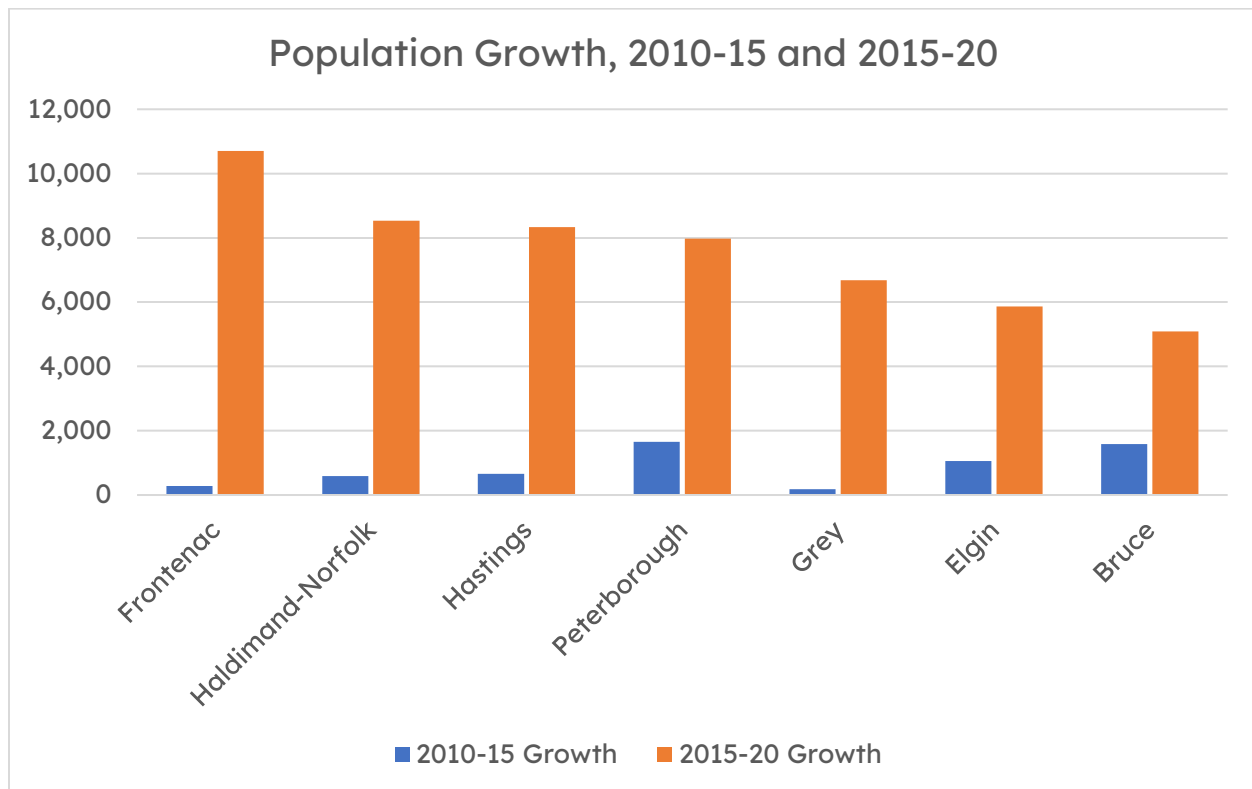
Figure 6: Population Growth for Ontario's 17 Group 2 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>10</sup>

Census Division	2010 Pop	2020 Pop	2010-15 Growth	2015-20 Growth	Difference
Frontenac	153,166	164,153	284	10,703	10,419
Haldimand-Norfolk	112,064	121,194	594	8,536	7,942
Hastings	138,126	147,127	663	8,338	7,675
Grey	95,112	101,971	176	6,683	6,507
Peterborough	138,284	147,907	1,651	7,972	6,321
Chatham-Kent	107,500	107,032	-2,978	2,510	5,488
Lambton	131,478	132,714	-2,025	3,261	5,286
Elgin	89,561	96,487	1,061	5,865	4,804
Muskoka	61,132	66,546	761	4,653	3,892
Perth	77,037	83,243	1,275	4,931	3,656
Bruce	67,633	74,301	1,583	5,085	3,502
Kawartha Lakes	75,082	81,368	1,402	4,884	3,482
Huron	60,704	63,190	-361	2,847	3,208
Greater Sudbury	164,831	169,132	775	3,526	2,751
Leeds and Grenville	101,875	105,510	523	3,112	2,589
Stormont, Dundas and Glengarry	115,464	119,127	604	3,059	2,455
Renfrew	103,519	107,543	1,397	2,627	1,230
<b>Group 2: Fast Growth in 2015-20 Only</b>	1,792,568	1,888,545	7,385	88,592	81,207

Visualizing the data helps illustrate the dramatic changes in absolute levels of population growth. Figure 7 contains data for population growth for each Group 2 Census Division that grew by 5,000 persons or more between 2015 and 2020.

<sup>10</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 7: Population Growth, by Number of Persons, for Group 2 Census Divisions that Grew By More than 5,000 Residents in 2015-20<sup>11</sup>.



The final set of census divisions, which are in Northern and Eastern Ontario, saw their collective populations decline by almost 5,000 in 2010-15, as shown by Figure 8. From 2015-20, however, Group 3's population rose by 8,502, with seven of 13 census divisions experiencing growth of 1,000 persons or more.

<sup>11</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 8: Population Growth for Ontario's 13 Group 3 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>12</sup>

Census Division	2010 Pop	2020 Pop	2010-15 Growth	2015-20 Growth	Difference
Algoma	119,791	118,658	-2,156	1,023	3,179
Nipissing	87,367	87,049	-1,535	1,217	2,752
Thunder Bay	150,275	151,201	-552	1,478	2,030
Prince Edward	25,881	25,840	-647	606	1,253
Parry Sound	43,135	44,943	300	1,508	1,208
Kenora	69,179	70,751	359	1,213	854
Timiskaming	33,955	33,173	-687	-95	592
Rainy River	21,076	20,516	-519	-41	478
Lennox and Addington	42,790	45,292	1,079	1,423	344
Sudbury	22,014	22,200	-15	201	216
Haliburton	17,190	19,485	1,062	1,233	171
Manitoulin	13,301	13,876	220	355	135
Cochrane	83,762	80,436	-1,707	-1,619	88
<b>Group 3: Modest Growth</b>	<b>729,716</b>	<b>733,420</b>	<b>-4,798</b>	<b>8,502</b>	<b>13,300</b>

Figure 9 summarizes the previous tables at a group level. In short, the 2015-20 period saw accelerated population growth, with that growth more widely distributed across the province.

Figure 9: Population Growth for Ontario's 3 Census Division Groups, for 2010-15 and 2015-20 Periods.<sup>13</sup>

Group	2010 Pop	2020 Pop	2010-15 Growth	2015-20 Growth	Difference
Group 1: Fast Growth Both Periods	10,613,494	12,123,747	568,753	941,500	372,747
Group 2: Fast Growth in 2015-20 Only	1,792,568	1,888,545	7,385	88,592	81,207
Group 3: Modest Growth	729,716	733,420	-4,798	8,502	13,300
<b>TOTAL</b>	<b>13,135,778</b>	<b>14,745,712</b>	<b>571,340</b>	<b>1,038,594</b>	<b>467,254</b>

With this data on where the population grew, we can now address the why by examining the various components of population growth.

<sup>12</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

<sup>13</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

## The three sources of Ontario's accelerated population growth: International students, immigration, and migration from other provinces

The rapid increase in Ontario's population growth rate came from three sources. The most significant source of growth was in a category known as *net non-permanent residents*, which are primarily international students and foreign workers. As Figure 10 illustrates, the growth in this category was more significant than the growth in immigration and the growth in people moving to Ontario from other provinces.<sup>14</sup>

Figure 10: Ontario's Population Growth by Source, 5 Year Periods<sup>15</sup>

Source	2010-15	2015-20	Change
Net Non-Permanent Residents (International Workers and Foreign Students)	68,135	284,142	216,007
Net Immigration <sup>16</sup>	387,916	544,824	156,908
Net Interprovincial (Between Provinces)	-51,778	41,826	93,604
Other (Births, Deaths, etc.)	167,067	167,082	735
<b>TOTAL</b>	<b>571,340</b>	<b>1,038,594</b>	<b>467,254</b>

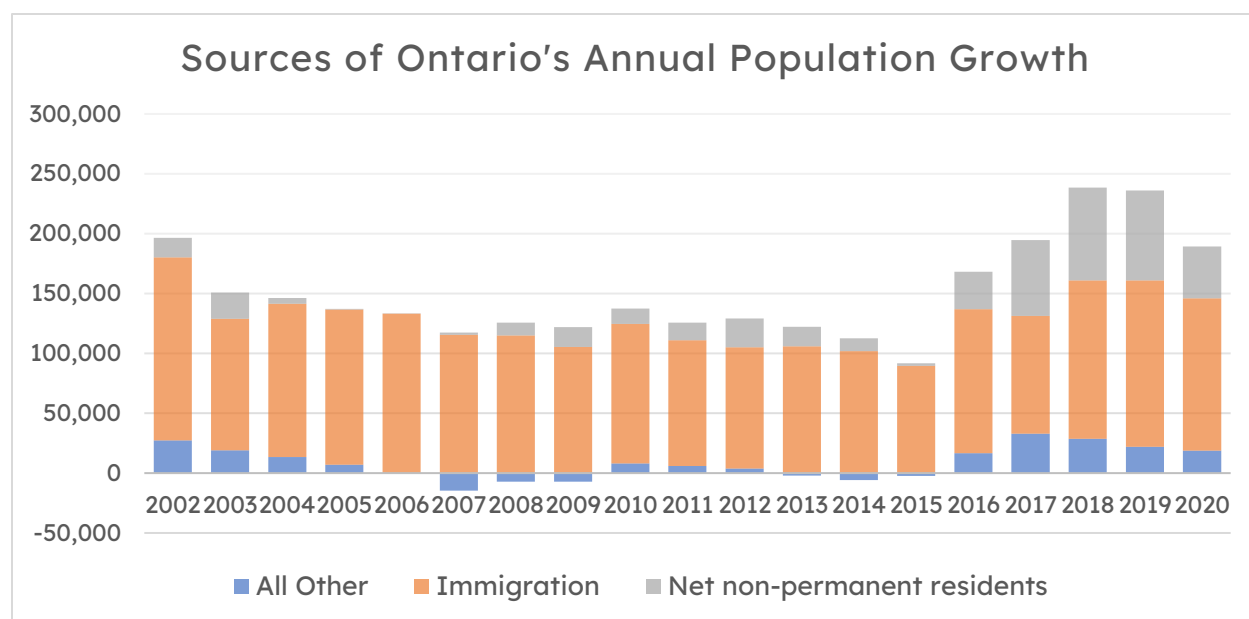
As shown by Figure 11, the number of net non-permanent residents had grown relatively modestly until 2015, but experienced substantial growth from 2016 to 2019. The growth between July 1, 2019 and July 1, 2020, shown in Figure 11 as 2020 was relatively muted, likely because of the start of the pandemic.

<sup>14</sup> The growth in interprovincial migration after 2015 was, in part, a response to the oil price crash of 2015. Ontario, which had been losing population, on net, to Alberta, experienced a reversal of population flows.

<sup>15</sup> Source: Moffatt (2021a).

<sup>16</sup> *Net Immigration* is calculated as new immigrants minus new emigrants plus returning emigrants minus temporary emigration.

Figure 11: Ontario's Population Growth by Source, by year<sup>17</sup>



To better understand these population dynamics, we will examine four sources of population growth at a census division level:

- Net non-permanent residents
- Net immigration
- Net interprovincial migration (families moving to and from Ontario from other provinces)
- Net intraprovincial migration (families moving from one Ontario community to another)

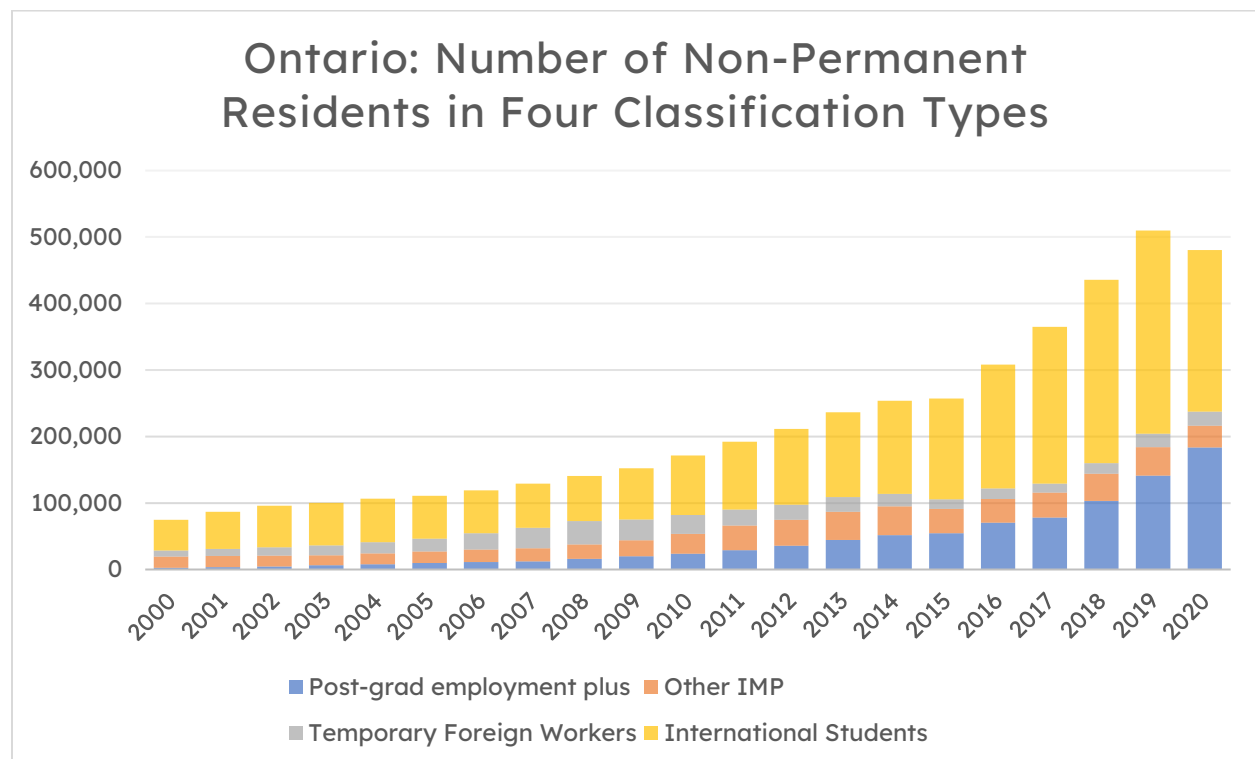
We will then end our analysis by examining population growth's impact on housing demand at a census division level.

<sup>17</sup> Source: Moffatt (2021a). Note: Population is measured as of July 1 each year. 2020 figure reflects change in population between July 1, 2019 and July 1, 2020.

## Net Non-Permanent Residents: The international student boom and why the term non-permanent resident is a misnomer

The net non-permanent residents category includes individuals holding work permits or study permits. As shown by Figure 12, almost all of the growth in net-non permanent residents has been in international students: those currently enrolled in school and those who have graduated and are staying in Canada under the Post-Graduation Work Permit Program (PGWPP).

Figure 12: The Number of Non-Permanent Residents in Ontario, by Classification Type and Year<sup>18</sup>



The increase in the number of international students can be traced back to a series of policy reforms instituted by the federal government. In 2008, the federal government introduced the Canada Experience Class, allowing international students who have graduated from a Canadian post-secondary institution and gained enough Canadian work experience to apply for permanent residency without leaving the country. In 2013, reforms were instituted that allowed international post-secondary graduates to stay up to three years in Canada, rather than 1-2 under the PGWPP.<sup>19</sup> And finally, a 2014 reform allowed international students to work up to 20 hours a week off-campus during school terms and full-time during breaks without applying for a separate work permit.<sup>20</sup> These changes and policy

<sup>18</sup> Source: Moffatt (2021a). Note: Population is measured as of July 1 each year. 2020 figure reflects change in population between July 1, 2019 and July 1, 2020.

<sup>19</sup> Tamburri (2013).

<sup>20</sup> Government of Canada (2014).

changes in the United Kingdom and the United States created an international student boom in Canada.<sup>21</sup>

While international students and those on PGWPP visas fall under the statistical category of *non-permanent residents*, this is a bit misleading. Many intend to apply for permanent residency once eligible, so they are best considered pre-permanent residents. But regardless of the path someone takes to get to Ontario, every resident needs a place to call home, so it is vital that homebuilding (of all types) keeps up with population growth.

Not surprisingly, the population of non-permanent residents grew fastest in communities with colleges and universities, and these typically (but not exclusively) are in large, fast-growing population centres. Figure 13 contains the change in the number of non-permanent residents in our Group 1 census divisions, sorted by the biggest difference between growth in 2010-15 and 2015-20.

Figure 13: Growth in the Net-Non-Permanent Residents Population for Ontario's 19 Group 1 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>22</sup>

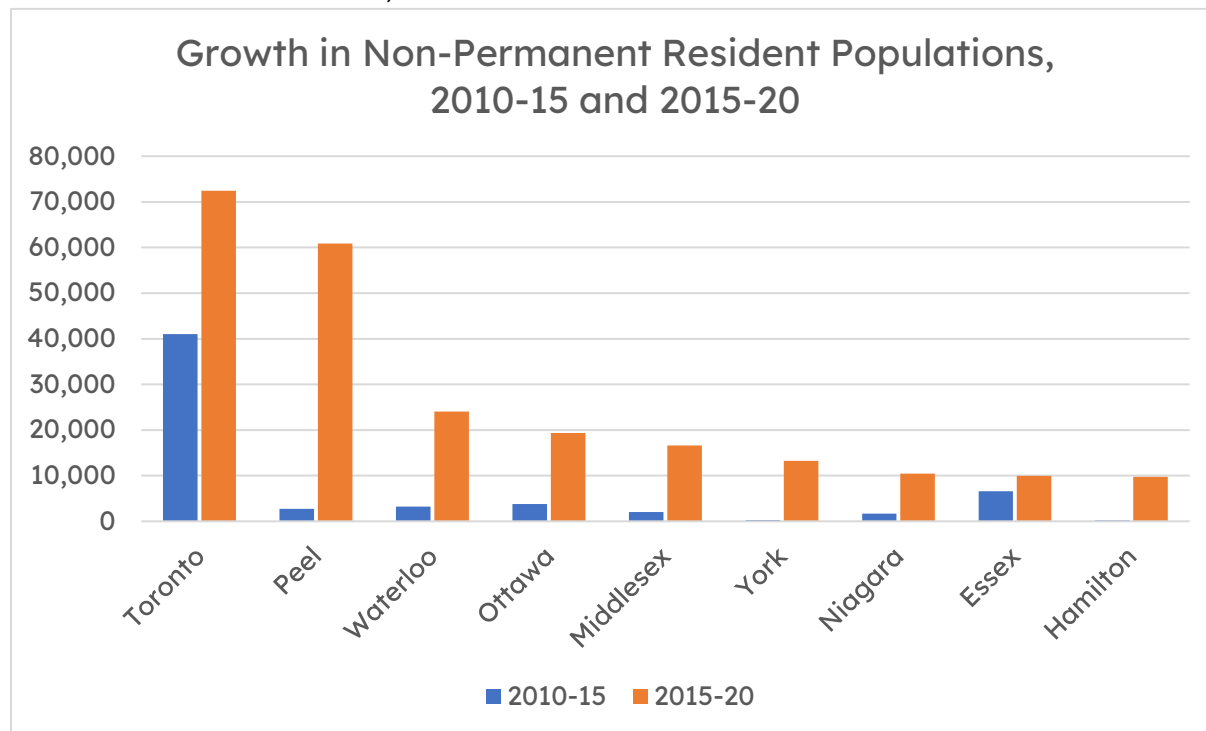
Census Division	2010-15	2015-20	Difference
Peel	2,717	60,832	58,115
Toronto	41,022	72,450	31,428
Waterloo	3,208	24,055	20,847
Ottawa	3,809	19,333	15,524
Middlesex	2,010	16,596	14,586
York	297	13,217	12,920
Hamilton	224	9,717	9,493
Niagara	1,699	10,445	8,746
Simcoe	487	5,959	5,472
Durham	377	4,956	4,579
Halton	910	4,814	3,904
Essex	6,623	9,943	3,320
Brant	81	1,249	1,168
Wellington	710	1,742	1,032
Oxford	40	608	568
Northumberland	-35	168	203
Dufferin	-15	123	138
Prescott and Russell	20	123	103
Lanark	10	57	47
<b>Group 1: Fast Growth Both Periods</b>	<b>64,194</b>	<b>256,387</b>	<b>192,193</b>

<sup>21</sup> For additional background on changes governing international students, see Moffatt and Atiq (2022).

<sup>22</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

In Figure 14, we visualize these population increases in communities that added 9,000 or more non-permanent residents between 2015 and 2020.

Figure 14: Growth in the Net-Non-Permanent Residents Population for Group 1 Census Divisions with 2015-20 Growth Levels above 9,000 Persons<sup>23</sup>



Several Group 2 census divisions also saw increases in the growth level of their net non-permanent resident population, as shown by Figure 15. Frontenac, home of Queen's University, St. Lawrence College, and Royal Military College, experienced the most significant growth in 2015-20 of any of our Group 2 communities.

<sup>23</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 15: Growth in the Net-Non-Permanent Residents Population for Ontario's 17 Group 2 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>24</sup>

Census Division	2010-15	2015-20	Difference
Frontenac	297	4,521	4,224
Greater Sudbury	370	3,486	3,116
Peterborough	715	2,766	2,051
Hastings	-2	1,885	1,887
Lambton	691	1,787	1,096
Chatham-Kent	-10	1,070	1,080
Stormont, Dundas and Glengarry	111	735	624
Bruce	-133	348	481
Grey	-43	422	465
Perth	14	430	416
Huron	25	424	399
Elgin	-4	326	330
Leeds and Grenville	53	365	312
Haldimand-Norfolk	807	1,026	219
Kawartha Lakes	5	194	189
Renfrew	-7	102	109
Muskoka	-50	-111	-61
<b>Group 2: Fast Growth in 2015-20 Only</b>	<b>2,839</b>	<b>19,776</b>	<b>16,937</b>

Like the rest of the province, Northern Ontario experienced an international student boom, with the non-permanent resident populations of Thunder Bay, Algoma, Cochrane, and Nipissing all rising from 2015-20, as shown by Figure 16.

<sup>24</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 16: Growth in the Net-Non-Permanent Residents Population for Ontario's 13 Group 2 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>25</sup>

Census Division	2010-15	2015-20	Difference
Thunder Bay	646	3,989	3,343
Algoma	261	1,844	1,583
Cochrane	-42	1,019	1,061
Nipissing	187	797	610
Sudbury	4	188	184
Prince Edward	12	119	107
Timiskaming	10	101	91
Haliburton	-1	20	21
Kenora	-4	5	9
Lennox and Addington	7	12	5
Manitoulin	11	-9	-20
Parry Sound	34	-11	-45
Rainy River	-23	-95	-72
<b>Group 3: Modest Growth</b>	<b>1,102</b>	<b>7,979</b>	<b>6,877</b>

Figure 17 summarizes the growth for our three groups of census divisions. All three groups saw increased population growth, with Group 1 experiencing a considerable jump in absolute terms. Groups 2 and 3 saw significant increases relative to their modest 2010-15 growth levels.

Figure 17: Non-Permanent Resident Population Growth for Ontario's 3 Census Division Groups, for 2010-15 and 2015-20 Periods.<sup>26</sup>

Group	2010-15	2015-20	Difference
Group 1: Fast Growth Both Periods	64,194	256,387	192,193
Group 2: Fast Growth in 2015-20 Only	2,839	19,776	16,937
Group 3: Modest Growth	1,102	7,979	6,877
<b>Total</b>	<b>68,135</b>	<b>284,142</b>	<b>216,007</b>

Many non-permanent residents eventually gain permanent residency, shifting from the non-permanent category into the immigration one. And like the non-permanent residents category, immigration numbers increased substantially after 2015.

<sup>25</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

<sup>26</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

## Immigration: A higher proportion of immigrants are settling outside of the GTA

Historically, immigrants have primarily settled in the Greater Toronto Area, and this continues to be true. However, other communities across eastern and southern Ontario have also experienced a rise in the number of immigrants. As shown in Figure 18, there has been a substantial rise in the number of immigrants calling Ottawa, Waterloo, Halton, Essex, and Middlesex home. This rise is due, in part, to the changes in Canada's immigration system described in the previous section. Many of these new permanent residents are not new to Ontario, but instead, they are international students that graduated from Carleton University or Fanshawe College and have obtained permanent residency in their communities.

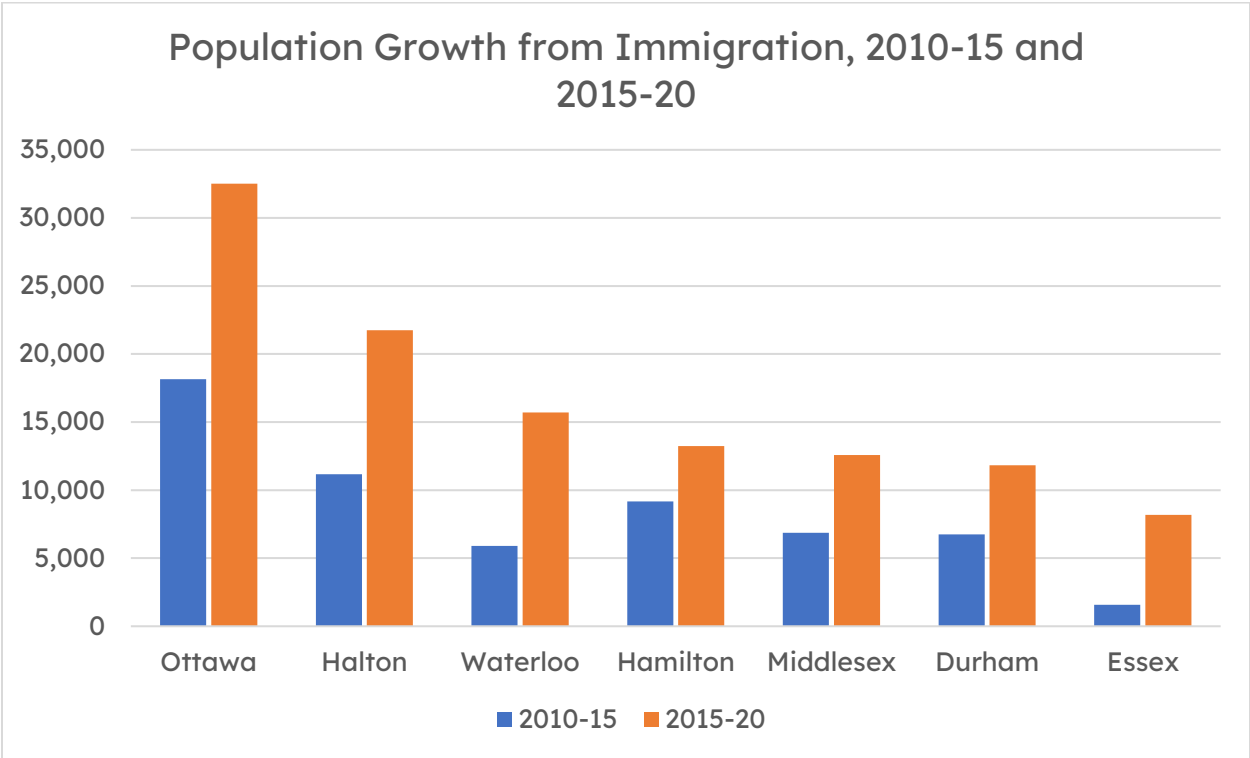
Figure 18: Number of Net New Immigrants, by Five Year Period, for Ontario's 19 Group 1 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>27</sup>

Census Division	2010-15	2015-20	Difference
Peel	102,033	150,178	48,145
Toronto	174,717	209,634	34,917
Ottawa	18,145	32,515	14,370
Halton	11,169	21,742	10,573
Waterloo	5,901	15,703	9,802
Essex	1,577	8,182	6,605
Middlesex	6,869	12,574	5,705
Durham	6,752	11,819	5,067
Hamilton	9,161	13,235	4,074
York	46,789	49,345	2,556
Niagara	2,295	4,518	2,223
Simcoe	1,266	3,247	1,981
Wellington	1,705	3,507	1,802
Oxford	-49	399	448
Dufferin	-24	333	357
Brant	450	795	345
Prescott and Russell	90	348	258
Lanark	-144	45	189
Northumberland	4	128	124
<b>Group 1: Fast Growth Both Periods</b>	<b>388,706</b>	<b>538,247</b>	<b>149,541</b>

<sup>27</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

To better illustrate the change in population growth outside of Toronto, Figure 19 shows growth through immigration for every census division in Ontario, where net new immigrants rose between 8,000 to 40,000 persons. The 40,000 upper bound excludes Toronto, Peel, and York, which exceeded those numbers.

Figure 19: Population Growth from Immigration, for Census Divisions with 2015-20 Population Growth Levels from Immigration between 8,000 and 40,000.<sup>28</sup>



In absolute terms, the number of net new immigrants settling in our Group 2 census divisions was relatively modest. Combined, the group attracted 5,633 in 2015-20, roughly half that of Middlesex alone. However, in relative growth, the increases were quite significant, as the 2010-15 figure was a mere 72. Like in Group 1, communities that are higher education centres, such as Frontenac, experienced gains in the number of net new immigrants, as shown by Figure 20.

<sup>28</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 20: Number of Net New Immigrants, by Five Year Period, for Ontario's 17 Group 2 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>29</sup>

Census Division	2010-15	2015-20	Difference
Frontenac	-117	955	1,072
Peterborough	108	731	623
Stormont, Dundas and Glengarry	-152	346	498
Greater Sudbury	324	776	452
Perth	245	606	361
Haldimand-Norfolk	55	369	314
Bruce	-37	275	312
Elgin	283	594	311
Huron	-152	127	279
Leeds and Grenville	-323	-57	266
Chatham-Kent	124	382	258
Hastings	-85	113	198
Lambton	-33	153	186
Grey	54	220	166
Muskoka	1	115	114
Kawartha Lakes	-76	21	97
Renfrew	-147	-93	54
<b>Group 2: Fast Growth in 2015-20 Only</b>	<b>72</b>	<b>5,633</b>	<b>5,561</b>

Our Group 3 census divisions experienced similar dynamics, as a population decline from net immigration of 862 in 2010-15 was offset by an increase of 944 in 2015-20, as shown by Figure 21.

<sup>29</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 21: Number of Net New Immigrants, by Five Year Period, for Ontario's 13 Group 3 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>30</sup>

Census Division	2010-15	2015-20	Difference
Thunder Bay	12	600	588
Algoma	-247	179	426
Rainy River	-277	-39	238
Kenora	-118	119	237
Cochrane	94	261	167
Nipissing	-251	-121	130
Prince Edward	-76	-8	68
Manitoulin	-1	39	40
Timiskaming	-2	15	17
Sudbury	2	-1	-3
Parry Sound	-8	-20	-12
Lennox and Addington	-25	-56	-31
Haliburton	35	-24	-59
<b>Group 3: Modest Growth</b>	<b>-862</b>	<b>944</b>	<b>1,806</b>

While immigration continues to be primarily located in larger communities in the GTA, there is a growing diversity in the places that immigrants call home, as summarized by Figure 22.

Figure 22: Net Population Growth through Immigration for Ontario's 3 Census Division Groups, for 2010-15 and 2015-20 Periods.<sup>31</sup>

Group	2010-15	2015-20	Difference
Group 1: Fast Growth Both Periods	388,706	538,247	149,541
Group 2: Fast Growth in 2015-20 Only	72	5,633	5,561
Group 3: Modest Growth	-862	944	1,806
<b>Total</b>	<b>387,916</b>	<b>544,824</b>	<b>156,908</b>

New residents not only come from outside Canada but also from within. Like with immigration, Ontario experienced an increase in the number of people from other provinces, known as interprovincial migration.

<sup>30</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

<sup>31</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

## Interprovincial Migration: During the oil boom, Ontarians moved to other provinces. When oil prices crashed, Ontario became a destination for Canadian workers

The interprovincial migration data describes the number of people moving to Ontario from other provinces, offset by the number of Ontarians moving to other provinces. Before the pandemic, the primary driver of this movement was employment opportunities. Before 2015, when oil prices were high and manufacturing employment was stagnant, many Ontarians moved to oil-producing provinces, primarily Alberta, for jobs. After oil prices crashed in 2015, the flow reversed, and workers from Alberta moved to Ontario; many of those workers were originally Ontarians who had left some years ago.

Figure 23 provides the net intraprovincial migration data for our Group 1 census divisions. During the oil boom, manufacturing communities such as Middlesex and Essex lost a disproportionate number of residents to other provinces.

Figure 23: Net Population Growth from Interprovincial Migration, by Five Year Period, for Ontario's 19 Group 1 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>32</sup>

Census Division	2010-15	2015-20	Difference
Toronto	2,900	18,663	15,763
Ottawa	4,331	18,593	14,262
Peel	-10,514	2,173	12,687
Middlesex	-3,265	2,262	5,527
York	-2,594	2,717	5,311
Essex	-4,009	922	4,931
Waterloo	-2,735	2,125	4,860
Durham	-5,026	-2,315	2,711
Hamilton	-2,503	183	2,686
Halton	-1,104	1,457	2,561
Niagara	-3,463	-1,945	1,518
Wellington	-1,123	82	1,205
Simcoe	-4,202	-3,016	1,186
Lanark	-384	257	641
Prescott and Russell	439	1,038	599
Brant	-746	-170	576
Oxford	-780	-324	456
Northumberland	-537	-491	46
Dufferin	-661	-747	-86
<b>Group 1: Fast Growth Both Periods</b>	<b>-35,976</b>	<b>41,464</b>	<b>77,440</b>

<sup>32</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Similar trends were experienced in Group 2. Like the manufacturing communities of Essex and Middlesex, Lambton had been losing workers to oil-producing provinces, a trend which reversed in 2015, as shown by Figure 24.

Figure 24: Net Population Growth from Interprovincial Migration, by Five Year Period, for Ontario's 17 Group 2 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>33</sup>

Census Division	2010-15	2015-20	Difference
Lambton	-1,336	570	1,906
Greater Sudbury	-1,441	-77	1,364
Hastings	-940	76	1,016
Elgin	-814	-74	740
Chatham-Kent	-615	80	695
Peterborough	-1,517	-824	693
Grey	-849	-164	685
Leeds and Grenville	-248	413	661
Stormont, Dundas and Glengarry	942	1,556	614
Muskoka	-616	-66	550
Frontenac	978	1,516	538
Renfrew	-360	144	504
Perth	-506	-77	429
Bruce	-362	59	421
Haldimand-Norfolk	-842	-474	368
Kawartha Lakes	-718	-385	333
Huron	-327	-71	256
<b>Group 2: Fast Growth in 2015-20 Only</b>	<b>-9,571</b>	<b>2,202</b>	<b>11,773</b>

The dynamics were different in Group 3, which continued to lose population to other provinces, even after the oil crash. However, the net population loss slowed down considerably, and some communities such as Kenora, Rainy River, and Sudbury experienced net population gains through intraprovincial migration, as shown in Figure 25.

<sup>33</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 25: Net Population Growth from Interprovincial Migration, by Five Year Period, for Ontario's 13 Group 3 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>34</sup>

Census Division	2010-15	2015-20	Difference
Algoma	-1,019	-71	948
Kenora	-931	6	937
Thunder Bay	-1,506	-912	594
Rainy River	-390	51	441
Cochrane	-842	-420	422
Nipissing	-591	-231	360
Parry Sound	-446	-141	305
Sudbury	-137	60	197
Lennox and Addington	-25	136	161
Timiskaming	-213	-165	48
Haliburton	-79	-58	21
Manitoulin	2	23	21
Prince Edward	-54	-118	-64
<b>Group 3: Modest Growth</b>	<b>-6,231</b>	<b>-1,840</b>	<b>4,391</b>

In 2010-15, all three census division groups lost population to the rest of Canada. In 2015-20, however, two of three groups experienced net population gain from other provinces, while Group 3 saw their losses shrink, as shown by Figure 26.

Figure 26: Net Population Growth through Interprovincial Migration for Ontario's 3 Census Division Groups, for 2010-15 and 2015-20 Periods.<sup>35</sup>

Group	2010-15	2015-20	Difference
Group 1: Fast Growth Both Periods	-35,976	41,464	77,440
Group 2: Fast Growth in 2015-20 Only	-9,571	2,202	11,773
Group 3: Modest Growth	-6,231	-1,840	4,391
Total	-51,778	41,826	93,604

Families also move within the province, known as *intraprovincial migration*. As with interprovincial migration, intraprovincial migration patterns also changed after 2015.

<sup>34</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

<sup>35</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

## Intraprovincial Migration: Young families ‘driving until they qualify’ across Southern Ontario

Total net intraprovincial migration across Ontario must, by definition, equal zero. For Ontario, every census division that gains a person, one other must lose a person. However, an individual census division can have significant positive or negative net intraprovincial migration. As shown by Figure 27, Peel and Toronto recorded high levels of net intraprovincial outmigration from 2010-15, which grew even further in 2015-20. York, which had been a net beneficiary of intraprovincial migration in 2010-15, saw flows reverse in 2015-20. In total, Toronto, Peel, and York lost a combined 274,124 residents to the rest of Ontario in 2015-20, up from 151,739 in 2010-15.

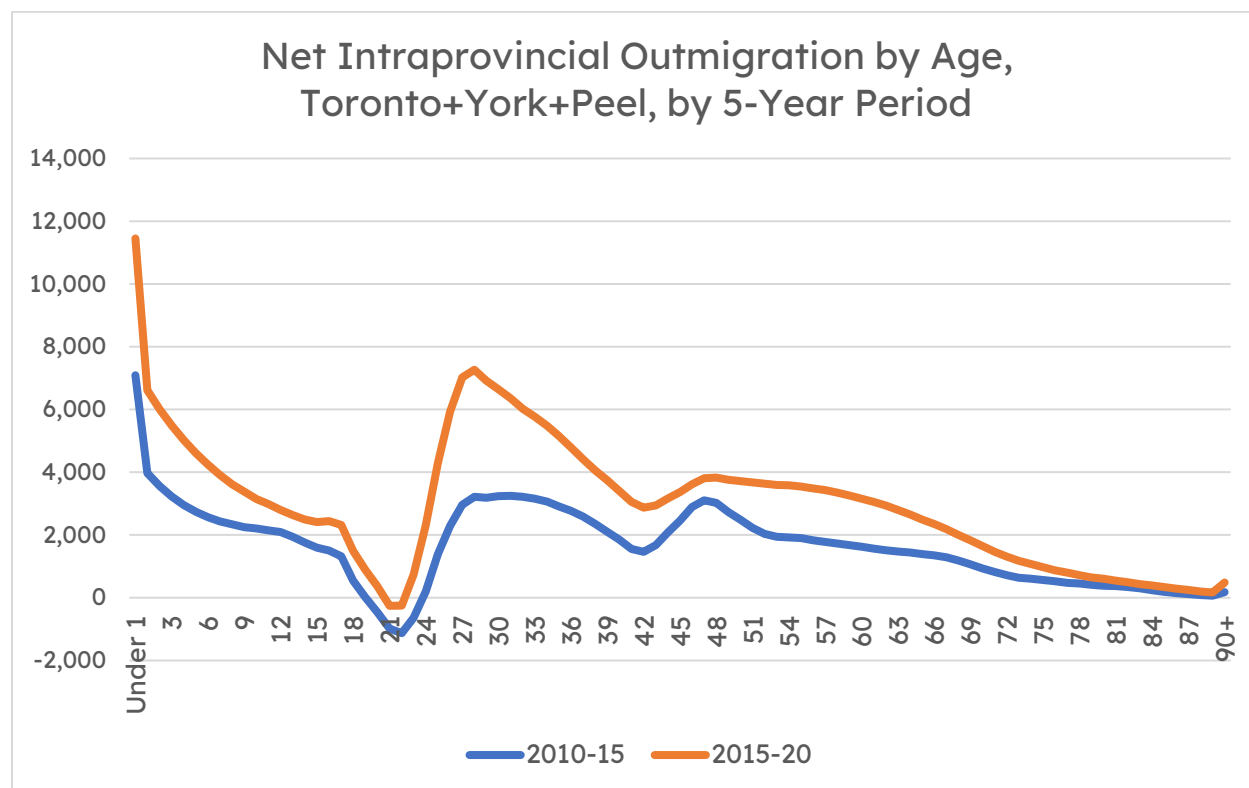
Figure 27: Net Population Growth from Intraprovincial Migration, by Five Year Period, for Ontario’s 19 Group 1 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>36</sup>

Census Division	2010-15	2015-20	Difference
Simcoe	31,054	45,376	14,322
Niagara	10,682	18,061	7,379
Ottawa	5,836	11,647	5,811
Waterloo	4,236	9,919	5,683
Oxford	2,884	7,849	4,965
Middlesex	6,531	11,447	4,916
Wellington	4,259	9,139	4,880
Lanark	1,402	4,689	3,287
Brant	4,020	7,012	2,992
Durham	27,817	30,539	2,722
Prescott and Russell	814	3,385	2,571
Essex	-2,128	-785	1,343
Dufferin	4,108	5,249	1,141
Northumberland	4,487	5,549	1,062
Hamilton	8,684	9,685	1,001
Halton	24,915	17,984	-6,931
York	8,795	-20,135	-28,930
Toronto	-122,103	-158,441	-36,338
Peel	-38,431	-95,548	-57,117
<b>Group 1: Fast Growth Both Periods</b>	<b>-12,138</b>	<b>-77,379</b>	<b>-65,241</b>

<sup>36</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

We can further subdivide our intraprovincial migration data by age to learn more about the 274,124 (net) residents who left Toronto, York and Peel regions. As shown by Figure 28, we see that the most common ages, on net, to leave Toronto, York, and Peel to move to other parts of the province are people in their late 20s and early 30s and young children. Young families searching for family-friendly housing are the largest cohort of the *drive until you qualify* Ontarians. There is also a substantial and growing number of people in their 50s moving to other parts of Ontario.

Figure 28: Net Intraprovincial Outmigration by Age, for 2010-15 and 2015-20 Periods, for Toronto, York and Peel Census Divisions.<sup>37</sup>



Eight census divisions in Group 1 saw their net intraprovincial migration numbers rise by 3,000 or more in 2015-20 relative to 2010-15: Simcoe, Niagara, Ottawa, Waterloo, Oxford, Middlesex, Wellington and Lanark. Our Group 2 census divisions can add 10 to that list, as shown by Figure 29. The total number of net intraprovincial migrants moving to Group 2 increased 5-fold, from 13,473 in 2010-15 to 69,479 in 2015-20.

<sup>37</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

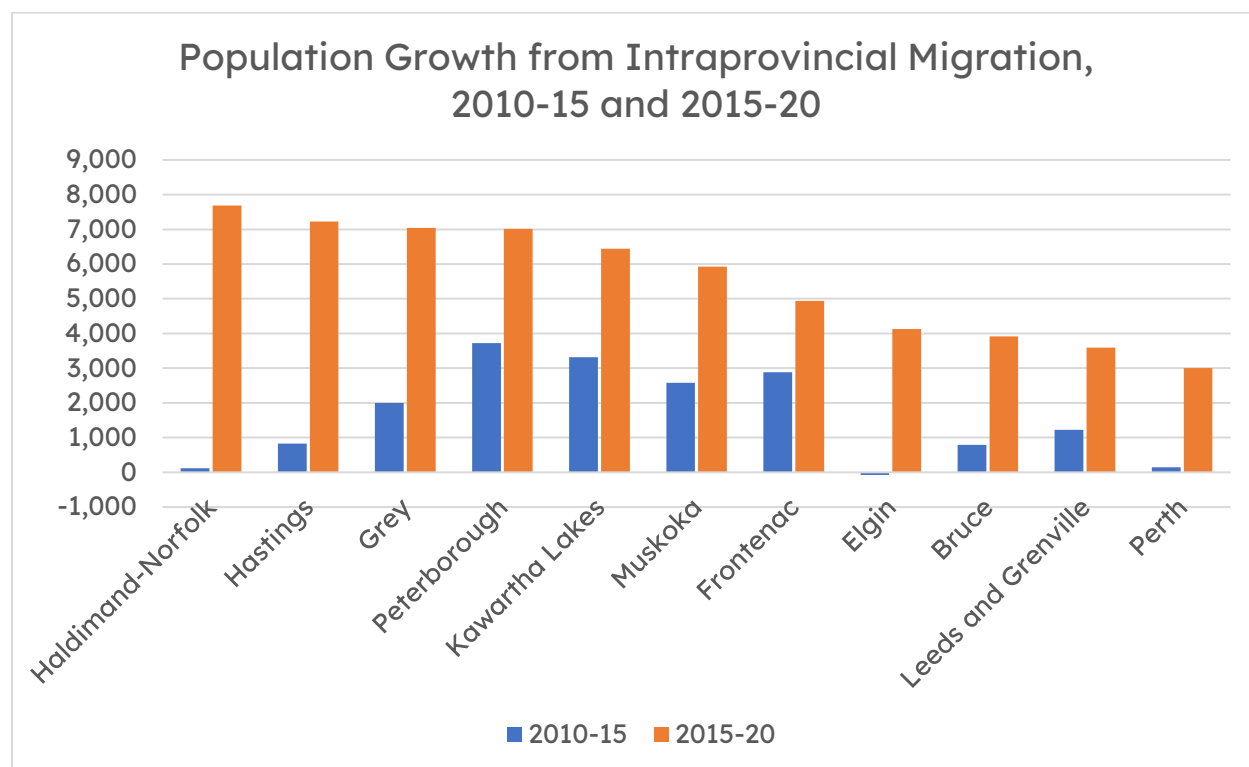
Figure 29: Net Population Growth from Intraprovincial Migration, by Five Year Period, for Ontario's 17 Group 2 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>38</sup>

Census Division	2010-15	2015-20	Difference
Haldimand-Norfolk	116	7,684	7,568
Hastings	826	7,222	6,396
Grey	1,996	7,044	5,048
Elgin	-75	4,129	4,204
Huron	-1,347	2,053	3,400
Muskoka	2,579	5,922	3,343
Peterborough	3,724	7,013	3,289
Chatham-Kent	-1,462	1,807	3,269
Bruce	789	3,920	3,131
Kawartha Lakes	3,317	6,440	3,123
Perth	149	3,008	2,859
Leeds and Grenville	1,228	3,592	2,364
Lambton	-708	1,655	2,363
Stormont, Dundas and Glengarry	-1,331	936	2,267
Renfrew	361	2,491	2,130
Frontenac	2,887	4,941	2,054
Greater Sudbury	424	-108	-532
<b>Group 2: Fast Growth in 2015-20 Only</b>	<b>13,473</b>	<b>69,749</b>	<b>56,276</b>

This dramatic change in intraprovincial migration patterns is vizaulized in Figure 30, which includes data on all Group 2 census divisions that experienced net intraprovincial migration levels of between 3,000 and 8,000 persons in 2015-20.

<sup>38</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 30: Population Growth from Intraprovincial Migration, for Group 2 Census Divisions with 2015-20 Intraprovincial Migration Growth Levels between 3,000 and 8,000.<sup>39</sup>



While less dramatic in scale, some of our Group 3 census divisions also saw an increase in net intraprovincial migration. Parry Sound, Nipissing, Haliburton, Lennox and Addington, Prince Edward, and Algoma all added over 1,000 net intraprovincial migrants from 2015-20, as shown by Figure 31.

<sup>39</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 31: Net Population Growth from Intraprovincial Migration, by Five Year Period, for Ontario's 13 Group 3 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>40</sup>

Census Division	2010-15	2015-20	Difference
Algoma	-1,075	1,275	2,350
Parry Sound	613	2,334	1,721
Sudbury	-1,220	-129	1,091
Nipissing	1,014	2,043	1,029
Prince Edward	365	1,362	997
Timiskaming	-579	181	760
Lennox and Addington	1,201	1,817	616
Haliburton	1,370	1,964	594
Manitoulin	115	598	483
Rainy River	-366	-7	359
Kenora	-793	-469	324
Cochrane	-2,309	-2,425	-116
Thunder Bay	329	-914	-1,243
<b>Group 3: Modest Growth</b>	<b>-1,335</b>	<b>7,630</b>	<b>8,965</b>

In summary, Group 2 and Group 3 each saw their net numbers of intraprovincial migrants increase, offset by a fall in Group 1, as shown by Figure 32. However, this aggregate number is a bit misleading, as 15 of 19 Group 1 census divisions saw their net number of intraprovincial migrants rise between 2015 and 20.

Figure 32: Net Population Growth through Intraprovincial Migration for Ontario's 3 Census Division Groups, for 2010-15 and 2015-20 Periods.<sup>41</sup>

Group	2010-15	2015-20	Difference
Group 1: Fast Growth Both Periods	-12,138	-77,379	-65,241
Group 2: Fast Growth in 2015-20 Only	13,473	69,749	56,276
Group 3: Modest Growth	-1,335	7,630	8,965
Total	0	0	0

In the past few sections, we have seen that different census divisions grew at different rates and sources. In the next section, we will summarize those findings.

<sup>40</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

<sup>41</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

## Population growth summary: For most communities, intraprovincial migration was the most significant component of growth

Although on net, Group 1 census divisions lost nearly 80,000 people, to the rest of the province, net intraprovincial migration was the most significant source of population growth in 10 of 19 Group 1 census divisions, as shown by Figure 33. Five GTA area census divisions and Ottawa had net immigration as their most significant source of population growth. In contrast, Essex, Middlesex, and Waterloo, all higher education centres, saw net non-permanent residents as their leading source of growth.

Figure 33: Components of Population Growth by Source, 2015-20, for Ontario's 19 Group 1 Census Divisions. Most Significant Component for Each Census Division in Bold.<sup>42</sup>

Census Division	Net Non-Permanent	Net Immigration	Net Interprovincial	Net Intraprovincial	Other	Total
Brant	1,249	795	-170	<b>7,012</b>	544	9,430
Dufferin	123	333	-747	<b>5,249</b>	1,147	6,105
Durham	4,956	11,819	-2,315	<b>30,539</b>	11,868	56,867
Essex	<b>9,943</b>	8,182	922	-785	2,104	20,366
Halton	4,814	<b>21,742</b>	1,457	17,984	10,552	56,549
Hamilton	9,717	<b>13,235</b>	183	9,685	3,260	36,080
Lanark	57	45	257	<b>4,689</b>	-163	4,885
Middlesex	<b>16,596</b>	12,574	2,262	11,447	4,077	46,956
Niagara	10,445	4,518	-1,945	<b>18,061</b>	-2,704	28,375
Northumberland	168	128	-491	<b>5,549</b>	-1,785	3,569
Ottawa	19,333	<b>32,515</b>	18,593	11,647	15,711	97,799
Oxford	608	399	-324	<b>7,849</b>	1,700	10,232
Peel	60,832	<b>150,178</b>	2,173	-95,548	41,955	159,590
Prescott and Russell	123	348	1,038	<b>3,385</b>	1,038	5,932
Simcoe	5,959	3,247	-3,016	<b>45,376</b>	2,938	54,504
Toronto	72,450	<b>209,634</b>	18,663	-158,441	50,114	192,420
Waterloo	<b>24,055</b>	15,703	2,125	9,919	11,775	63,577
Wellington	1,742	3,507	82	<b>9,139</b>	4,427	18,897
York	13,217	<b>49,345</b>	2,717	-20,135	24,223	69,367
<b>Group 1: Fast Growth Both Periods</b>	256,387	<b>538,247</b>	41,464	-77,379	182,781	941,500

<sup>42</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Nearly 80% of Group 2's population growth came from net intraprovincial migration, which was the most significant component in 14 of 17 Group 2 census divisions, as shown by Figure 34. Stormont, Dundas and Glengarry was only one of three census divisions in Ontario to have interprovincial migration as their largest net source of population growth.

Figure 34: Components of Population Growth by Source, 2015-20, for Ontario's 17 Group 2 Census Divisions. Most Significant Component for Each Census Division in Bold.<sup>43</sup>

Census Division	Net Non-Permanent	Net Immigration	Net Interprovincial	Net Intraprovincial	Other	Total
Bruce	348	275	59	<b>3,920</b>	483	5,085
Chatham-Kent	1,070	382	80	<b>1,807</b>	-829	2,510
Elgin	326	594	-74	<b>4,129</b>	890	5,865
Frontenac	4,521	955	1,516	<b>4,941</b>	-1,230	10,703
Greater Sudbury	<b>3,486</b>	776	-77	-108	-551	3,526
Grey	422	220	-164	<b>7,044</b>	-839	6,683
Haldimand-Norfolk	1,026	369	-474	<b>7,684</b>	-69	8,536
Hastings	1,885	113	76	<b>7,222</b>	-958	8,338
Huron	424	127	-71	<b>2,053</b>	314	2,847
Kawartha Lakes	194	21	-385	<b>6,440</b>	-1,386	4,884
Lambton	<b>1,787</b>	153	570	1,655	-904	3,261
Leeds and Grenville	365	-57	413	<b>3,592</b>	-1,201	3,112
Muskoka	-111	115	-66	<b>5,922</b>	-1,207	4,653
Perth	430	606	-77	<b>3,008</b>	964	4,931
Peterborough	2,766	731	-824	<b>7,013</b>	-1,714	7,972
Renfrew	102	-93	144	<b>2,491</b>	-17	2,627
Stormont, Dundas and Glengarry	735	346	<b>1,556</b>	936	-514	3,059
<b>Group 2: Fast Growth in 2015-20 Only</b>	19,776	5,633	2,202	<b>69,749</b>	-8,768	88,592

<sup>43</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Intraprovincial migration and increased non-permanent residents were roughly tied for the most significant components of population growth in our Group 3 Census Divisions, as shown by Figure 35. Kenora was the only census division in Ontario to have *other* as a leading source of population growth, primarily due to high birth rates in the area.

Figure 35: Components of Population Growth by Source, 2015-20, for Ontario's 13 Group 3 Census Divisions. Most Significant Component for Each Census Division in Bold.<sup>44</sup>

Census Division	Net Non-Permanent	Net Immigration	Net Interprovincial	Net Intraprovincial	Other	Total
Algoma	<b>1,844</b>	179	-71	1,275	-2,204	1,023
Cochrane	<b>1,019</b>	261	-420	-2,425	-54	-1,619
Haliburton	20	-24	-58	<b>1,964</b>	-669	1,233
Kenora	5	119	6	-469	<b>1,552</b>	1,213
Lennox and Addington	12	-56	<b>136</b>	1,817	-486	1,423
Manitoulin	-9	39	23	<b>598</b>	-296	355
Nipissing	797	-121	-231	<b>2,043</b>	-1,271	1,217
Parry Sound	-11	-20	-141	<b>2,334</b>	-654	1,508
Prince Edward	119	-8	-118	<b>1,362</b>	-749	606
Rainy River	-95	-39	<b>51</b>	-7	49	-41
Sudbury	<b>188</b>	-1	60	-129	83	201
Thunder Bay	<b>3,989</b>	600	-912	-914	-1,285	1,478
Timiskaming	101	15	-165	<b>181</b>	-227	-95
<b>Group 3: Modest Growth</b>	<b>7,979</b>	944	-1,840	7,630	-6,211	8,502

Figure 36 provides the summary numbers for the three census division groups and illustrates the difference in the growth dynamics between the three groups. In total, Group 1 grew mainly through immigration and an increase in non-permanent residents (though many individual census divisions had high numbers of intraprovincial migrants). Group 2 grew almost exclusively through net intraprovincial migration, whereas Group 3 grew due to an increase in non-permanent residents and net intraprovincial migration.

<sup>44</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 36: Components of Population Growth by Source, 2015-20, by Census Division group. Most Significant Component for Each Census Division in Bold.<sup>45</sup>

Group	Net Non-Permanent	Net Immigration	Net Interprovincial	Net Intraprovincial	Other	Total
<b>Group 1: Fast Growth Both Periods</b>	256,387	<b>538,247</b>	41,464	-77,379	182,781	941,500
<b>Group 2: Fast Growth in 2015-20 Only</b>	19,776	5,633	2,202	<b>69,749</b>	-8,768	88,592
<b>Group 3: Modest Growth</b>	<b>7,979</b>	944	-1,840	7,630	-6,211	8,502
Total	284,142	<b>544,824</b>	41,826	0	167,802	1,038,594

Every Ontarian needs a place to call home, so an increasing population leads to increased demand for housing. The following section will examine the relationship between population growth and demographic-based housing demand at a local level.

<sup>45</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

## Estimating Ontario's demographic-based demand for housing

The relationship between population growth and increased housing needs is not as straightforward as saying *if the population growth rate doubles, then home building should double*. As described in the study *Baby Needs a New Home*<sup>46</sup>, housing demand is a function of the growth of the number of *households* in the province rather than the growth in the number of *individuals*:

A family having a second child adds to the province's population, though does not change the number of households in the province, whereas a person moving out of their parents' house into their first apartment in the same city does not raise the province's population, but it increases the number of households by one. And, finally, the expectation of a family's first child may not change the number of households but does change the type of home in which they wish to live.

It is possible, however, to account for these factors by examining demographic changes by age, not just absolute changes in population

Using the methodology described in Moffatt 2021a, we can take the population growth data by age and location and estimate the number of net new households formed in each of Ontario's 49 census divisions<sup>47</sup>. Household formations can be estimated using head of household estimates from Census 2016 at a census division level; these estimates can be found in the Appendix. Figure 37 provides estimates for housing demand and data for housing unit completions. From 2002 to 2015, gross housing unit completions kept pace with the estimated growth in households<sup>48</sup> (calculated using the Moffatt 2021a methodology). However, in the five-year 2015-20 period, housing unit completions lag the growth in the estimated number of net new households by nearly 100,000 units.<sup>49</sup>

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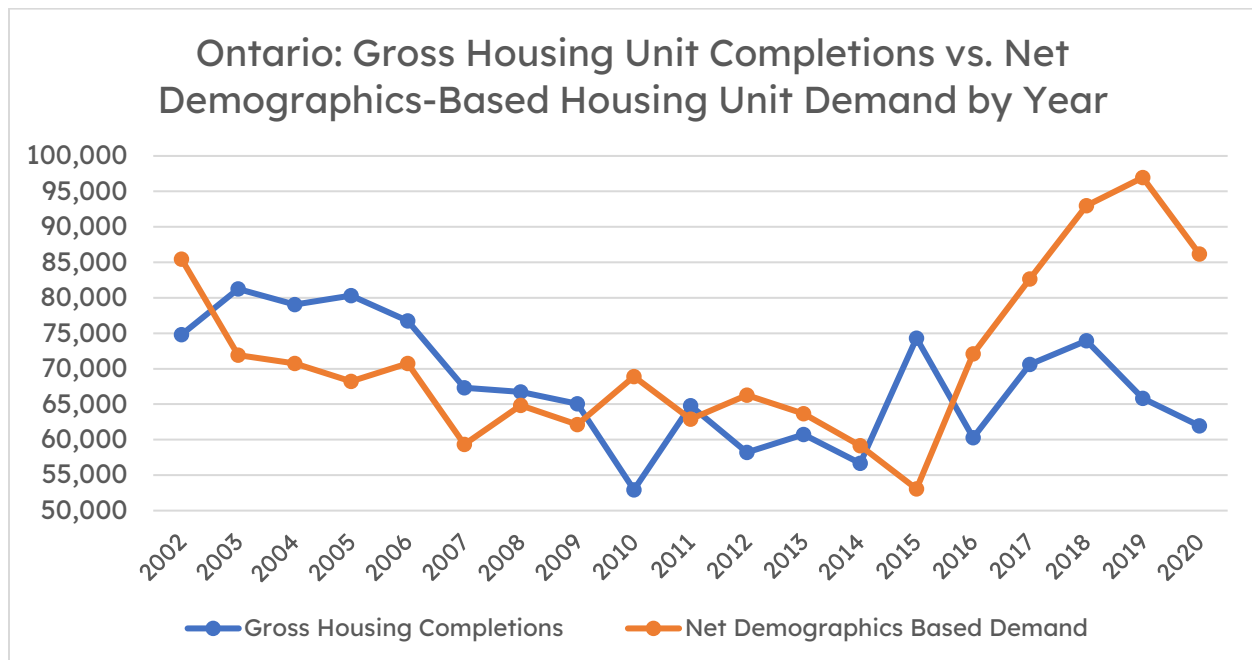
<sup>46</sup> Moffatt (2021a).

<sup>47</sup> In Ontario, a Census Division is typically a regional municipality, a county, or, in northern Ontario, a district.

<sup>48</sup> Note that gross housing completions should typically exceed the growth in the net number of households, as housing completions does not take into account loss of housing units through demolitions.

<sup>49</sup> This gap has narrowed somewhat in 2021, with housing completions remaining high, but population growth from international sources having evaporated. Using Ministry of Finance population projections, Moffatt 2021a calculates the 2016-21 housing underbuilding to be 65,000 units, a substantial closure of the gap, that is likely to widen again with the post-COVID return of international students.

Figure 37: Gross Housing Unit Completions and Net Demographics-Based Housing Unit Demand by Year for Ontario.<sup>50</sup>



We can divide this *net demographics-based demand* by census division, though it is vital to note that housing demand has high levels of spillover effects. If housing demand exceeds completions in one census division, that excess demand spills over to the surrounding census divisions, causing the *drive until you qualify* phenomenon. We should recognize that the actual demographics-based demand for housing is higher than shown in communities that lost population through intraprovincial migration.

With that caveat in mind, the following section provides our estimates for demographic-based housing demand by census division.

<sup>50</sup> Source: Author's calculation. Housing data from Statistics Canada, Table: 34-10-0135-01. Population is measured as of July 1 each year. 2020 figure reflects the change in population between July 1, 2019, and July 1, 2020

## Demographic-based housing demand by census division

In Figure 38, we see the demographic-based housing demand increased in 17 of 19 census divisions in 2015-20, with only Northumberland and York showing a decline. York's decline can be explained by increased outmigration to other parts of Ontario. In Middlesex, the demographic-based demand for housing more than doubled, and it close to doubled in Waterloo as well.

Figure 38: Net New Demographic Based Housing Demand, by Five Year Period, for Ontario's 19 Group 1 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>51</sup>

Census Division	2010-15	2015-20	Difference
Toronto	61,809	88,547	26,738
Ottawa	23,980	42,095	18,115
Peel	37,234	49,261	12,027
Middlesex	8,565	19,705	11,140
Waterloo	12,724	23,762	11,038
Simcoe	15,501	23,042	7,541
Hamilton	9,998	15,813	5,815
Niagara	8,873	13,280	4,407
Durham	18,720	22,754	4,034
Wellington	6,027	8,675	2,648
Halton	18,826	20,954	2,128
Oxford	2,608	4,201	1,592
Brant	2,436	3,948	1,512
Essex	6,811	8,189	1,378
Lanark	1,807	2,522	715
Dufferin	1,894	2,375	481
Prescott and Russell	2,559	2,903	344
Northumberland	2,442	2,208	-234
York	37,678	31,517	-6,161
<b>Group 1: Fast Growth Both Periods</b>	<b>280,492</b>	<b>385,752</b>	<b>105,260</b>

In Group 1, only one census division saw a more than doubling of demographics-based housing demand. In Group 2, as shown by Figure 39, the entire *group* saw a doubling of demographics-based housing demand, including in eight of 17 census divisions. Chatham-Kent, which shrank in population in 2010-15, saw substantial population growth and demographic-based housing demand in 2015-20.

<sup>51</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 39: Net New Demographic Based Housing Demand, by Five Year Period, for Ontario's 17 Group 2 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>52</sup>

Census Division	2010-15	2015-20	Difference
Frontenac	1,821	5,024	3,203
Haldimand-Norfolk	1,320	3,975	2,655
Hastings	1,592	4,063	2,471
Grey	913	3,112	2,200
Chatham-Kent	-108	1,756	1,864
Elgin	1,180	2,806	1,625
Peterborough	1,872	3,474	1,603
Muskoka	1,149	2,483	1,334
Perth	1,111	2,443	1,332
Lambton	594	1,838	1,244
Huron	389	1,405	1,016
Kawartha Lakes	1,529	2,391	862
Bruce	1,293	2,098	805
Greater Sudbury	1,385	2,080	695
Leeds and Grenville	1,489	2,130	642
Renfrew	1,280	1,777	497
Stormont, Dundas and Glengarry	1,349	1,729	379
<b>Group 2: Fast Growth in 2015-20 Only</b>	<b>20,157</b>	<b>44,585</b>	<b>24,428</b>

The demographic-based housing demand estimates for Group 3 were less dramatic at a group level, as shown by Figure 40. However, some individual census divisions, such as Algoma, Nipissing, and Prince Edward, saw significant housing demand increases in relative and absolute terms.

<sup>52</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

Figure 40: Net New Demographic Based Housing Demand, by Five Year Period, for Ontario's 13 Group 3 Census Divisions, for 2010-15 and 2015-20 Periods, Sorted by Largest Difference Between 2015-20 and 2010-15.<sup>53</sup>

Census Division	2010-15	2015-20	Difference
Algoma	12	827	815
Nipissing	250	1,011	761
Prince Edward	105	491	386
Thunder Bay	977	1,220	243
Parry Sound	681	898	216
Kenora	585	744	160
Lennox and Addington	840	941	102
Rainy River	-17	67	84
Sudbury	230	304	74
Timiskaming	-118	-66	51
Manitoulin	248	246	-2
Haliburton	814	727	-88
Cochrane	-201	-355	-153
<b>Group 3: Modest Growth</b>	<b>4,406</b>	<b>7,054</b>	<b>2,648</b>

In summary, all three of our census divisions groups experienced an increase in housing demand, with Group 1 naturally having the most considerable absolute growth. Still, Group 2 experienced the most significant growth in relative terms, thanks to an influx of *drive until you qualify* families, as shown by Figure 41.

Figure 41: Net New Demographic Based Housing Demand for Ontario's 3 Census Division Groups, for 2010-15 and 2015-20 Periods.<sup>54</sup>

Group	2010-15	2015-20	Difference
Group 1: Fast Growth Both Periods	280,492	385,752	105,260
Group 2: Fast Growth in 2015-20 Only	20,157	44,585	24,428
Group 3: Modest Growth	4,406	7,054	2,648
Total	305,055	437,391	132,336

<sup>53</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

<sup>54</sup> Source: Statistics Canada, Table: 17-10-0140-01. Note: Population is measured as of July 1 each year. 2015-20 figure reflects change in population between July 1, 2015 and July 1, 2020.

## Conclusion and possible policy implications

This report, along with Smart Prosperity's earlier reports on Ontario demographics and housing demand, *Baby Needs a New Home*<sup>55</sup> and *Forecast for Failure*,<sup>56</sup> tells a relatively straightforward story that can be summarized as follows:

Ontario's population, which had been growing by 120,000 persons per year, grew by an average of 200,000 people, per year, in the five years between 2015 and 2020. This accelerated growth was due to federal policy changes, which led to a rapid increase in the number of international students seeking permanent residency, increased immigration, and Canadians moving to the province after the oil price crash of 2015. The construction of family-sized housing, particularly in the Greater Toronto Area, could not keep up with population growth, causing housing shortages and high home prices in the years preceding the pandemic. This shortage of family-friendly housing caused young families to scatter across the province in search of housing they could afford, in a process known as *drive until you qualify*, as over 270,000 people, on net, moved out of Toronto, York, and Peel to other parts of the province. This movement caused the populations in other parts of the province to boom, causing further regional housing shortages and high prices. And then the pandemic started.

The pandemic has altered these dynamics, as falling global interest rates, high savings rates of white-collar professionals, and families moving looking for more space<sup>57</sup> have led to explosive housing price growth. In contrast, Ontario's population growth cooled due to a dramatic drop in the number of international students. While higher interest rates will cool this appreciation, Ontario's population is forecast<sup>58</sup> to resume growing by 200,000 persons per year once the pandemic is over.

It is imperative that, as a society, we find ways to create adequate housing for everyone calling Ontario home. One place to begin is increasing the supply of family-friendly, climate-friendly housing within our big cities. There are three channels through which this can be accomplished:

1. By increasing the number of family-sized homes within our cities.
2. By increasing the number of student and graduate-friendly housing options, which can slow or reverse the conversion of family homes to student rentals.
3. By increasing the amount of seniors-friendly housing, which will give existing homeowners more ability to downsize and accelerate the generational turnover of existing family-sized homes.

It is important to note that those channels are goals or aspirations; they are not policies. The policies to get us there are beyond the scope of this paper<sup>59</sup>; our objective was to understand better why and where Ontario's population was growing before the pandemic. All three governments, along with the colleges and universities driving much of Ontario's population growth, must work together and ensure that every Ontarian has a place to call home.

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<sup>55</sup> Moffatt (2021)

<sup>56</sup> Moffatt and Atiq (2022)

<sup>57</sup> During the pandemic, we have seen a substantial increase in families buying 2<sup>nd</sup> properties, as many buy these larger homes with selling their existing property, leading to further housing shortages and low inventory levels.

<sup>58</sup> By the Ontario Ministry of Finance

<sup>59</sup> But will be the subject of future research.

## Appendix: Household Headship Rates by Census Division, 2016 Census:

Census Division	Total - Age of primary household maintainer	15 to 24 years	25 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years	65 to 74 years	75 to 84 years	85 years and over
Algoma	50.5%	11.7%	42.0%	51.8%	56.3%	58.0%	62.1%	66.4%	60.2%
Brant	44.4%	7.0%	38.1%	48.1%	52.9%	54.9%	58.2%	61.5%	50.7%
Bruce	48.9%	7.2%	43.4%	53.1%	52.5%	56.9%	60.4%	61.9%	55.5%
Chatham-Kent	49.2%	10.3%	42.6%	51.5%	57.4%	57.6%	60.8%	65.9%	54.9%
Cochrane	49.9%	12.6%	44.7%	53.0%	56.7%	57.6%	63.7%	70.3%	59.0%
Dufferin	42.1%	3.3%	35.0%	49.1%	53.0%	54.5%	54.9%	59.8%	38.5%
Durham	41.6%	2.8%	30.5%	47.6%	53.8%	55.3%	56.8%	59.7%	49.3%
Elgin	47.0%	7.3%	41.5%	50.7%	54.1%	56.5%	60.7%	64.4%	57.9%
Essex	46.2%	8.1%	38.1%	50.1%	55.3%	57.3%	60.7%	64.9%	55.7%
Frontenac	48.5%	15.7%	43.8%	50.0%	56.0%	57.1%	60.6%	62.2%	60.5%
Greater Sudbury	49.2%	12.4%	46.0%	52.4%	57.2%	56.5%	62.4%	65.1%	56.4%
Grey	48.1%	8.2%	40.0%	51.6%	53.6%	56.3%	59.8%	62.4%	53.6%
Haldimand-Norfolk	45.4%	5.5%	36.0%	47.6%	52.4%	54.8%	59.6%	63.4%	57.0%
Haliburton	50.5%	4.8%	37.5%	50.5%	52.5%	54.1%	59.6%	63.8%	64.9%
Halton	42.3%	2.3%	31.3%	47.6%	54.4%	55.6%	56.3%	58.6%	48.4%
Hamilton	45.6%	7.4%	36.9%	50.0%	55.2%	57.6%	60.5%	63.7%	56.3%
Hastings	48.0%	9.4%	42.1%	49.5%	54.6%	56.6%	59.2%	66.2%	53.6%
Huron	47.8%	8.5%	42.2%	51.4%	54.7%	55.0%	61.1%	65.6%	50.0%
Kawartha Lakes	46.3%	5.0%	36.0%	47.0%	50.5%	54.7%	58.0%	61.7%	59.1%
Kenora	44.0%	7.9%	38.0%	48.8%	54.8%	55.8%	58.3%	68.5%	62.5%
Lambton	49.8%	10.0%	44.7%	53.3%	56.2%	57.5%	61.5%	65.2%	59.3%
Lanark	47.7%	6.7%	39.7%	47.9%	55.5%	56.3%	59.8%	62.3%	50.5%
Leeds and Grenville	48.1%	6.7%	39.5%	50.5%	54.9%	56.2%	58.4%	63.9%	56.8%
Lennox and Addington	45.5%	6.1%	38.2%	47.5%	50.6%	54.3%	58.2%	59.8%	48.4%
Manitoulin	50.4%	11.1%	38.3%	53.3%	56.1%	58.4%	61.3%	68.9%	54.4%
Middlesex	48.1%	13.6%	43.8%	51.9%	57.3%	58.8%	61.0%	66.2%	54.5%
Muskoka	46.3%	5.9%	35.4%	49.2%	51.9%	53.6%	57.5%	63.0%	52.8%
Niagara	46.9%	7.9%	38.4%	50.0%	55.1%	56.7%	59.7%	64.3%	53.8%
Nipissing	49.4%	11.9%	45.1%	51.5%	55.7%	56.6%	61.1%	65.6%	61.5%
Northumberland	46.9%	4.8%	36.3%	48.8%	51.4%	56.0%	58.2%	60.2%	53.2%
Ottawa	46.3%	11.4%	41.4%	51.2%	57.2%	58.1%	59.7%	60.1%	45.8%
Oxford	47.1%	8.2%	42.0%	51.3%	55.8%	55.7%	59.2%	63.0%	58.1%
Parry Sound	48.7%	7.0%	38.1%	48.3%	53.3%	53.5%	59.9%	62.7%	62.9%
Peel	36.6%	2.6%	23.2%	43.8%	52.6%	52.7%	49.4%	48.1%	43.7%
Perth	47.2%	8.9%	42.7%	51.7%	54.8%	57.9%	60.6%	62.6%	52.6%
Peterborough	47.5%	12.0%	41.4%	49.2%	54.3%	55.6%	60.2%	62.0%	51.3%

Prescott and Russell	46.2%	6.8%	41.6%	50.8%	54.0%	55.6%	58.3%	58.2%	39.4%
Prince Edward	48.0%	5.1%	33.0%	50.9%	52.4%	52.3%	58.3%	62.1%	62.1%
Rainy River	49.3%	9.9%	42.8%	54.9%	53.3%	58.6%	63.0%	70.0%	56.5%
Renfrew	48.4%	9.1%	44.2%	50.6%	55.2%	55.6%	60.4%	67.0%	49.0%
Simcoe	44.3%	5.0%	36.1%	49.0%	53.5%	55.1%	57.9%	60.5%	50.7%
Stormont, Dundas and Glengarry	48.6%	11.2%	42.2%	50.9%	54.9%	56.6%	61.1%	62.6%	51.6%
Sudbury	48.8%	8.4%	41.8%	49.2%	52.7%	54.7%	58.9%	69.4%	67.0%
Thunder Bay	49.1%	10.1%	42.3%	52.0%	56.5%	59.2%	62.8%	66.7%	57.4%
Timiskaming	51.3%	12.8%	48.1%	50.5%	56.7%	58.3%	63.4%	69.2%	56.9%
Toronto	46.1%	10.9%	39.4%	50.4%	56.3%	58.1%	59.7%	61.8%	55.5%
Waterloo	44.6%	9.7%	39.9%	50.0%	55.6%	56.9%	58.1%	59.6%	49.5%
Wellington	44.9%	9.4%	39.4%	50.4%	53.6%	56.5%	57.5%	60.9%	53.7%
York	37.7%	1.8%	23.5%	43.8%	51.4%	52.1%	50.4%	50.2%	41.4%

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