

Subject: Official Plan Update - Growth Projections

File Number: ACS2026-PDB-PS-0002

Report to Joint meeting of Planning and Housing Committee and Agriculture and Rural Affairs Committee on 18 February 2026

and Council 25 February 2026

Submitted on February 6, 2026 by Derrick Moodie, Director, Planning Services, Planning, Development and Building Services Department

Contact Person: Phil Castro, Planner III, Policy Planning

613-580-2424 ext. 16616, Phil.Castro@ottawa.ca

Ward: City Wide

Objet : Mise à jour du plan officiel – Prévisions de croissance

Dossier: ACS2026-PDB-PS-0002

Rapport à la réunion conjointe du Comité de la planification et du logement et du Comité de l'agriculture et des affaires rurales

le 18 février 2026

et au Conseil le 25 février 2026

Soumis le 6 février 2026 par Derrick Moodie, Directeur, Services de la planification, Direction générale des services de la planification, de l'aménagement et du bâtiment

Personne ressource: Phil Castro, Urbaniste III, Politiques de la planification

613-580-2424 poste 16616, Phil.Castro@ottawa.ca

Quartier: À l'échelle de la ville

REPORT RECOMMENDATIONS

That Planning and Housing Committee and Agriculture and Rural Affairs Committee recommend Council adopt the population, household and employment projections, in Document 1, as the basis for the growth management strategy and future Official Plan update.

RECOMMANDATIONS DU RAPPORT

Que le Comité de la planification et du logement et le Comité de l'agriculture et des affaires rurales recommandent au Conseil municipal d'adopter les projections de la population, des ménages et de l'emploi de la pièce 1 comme points de départ de la stratégie de gestion de la croissance et de la prochaine mise à jour du Plan officiel.

EXECUTIVE SUMMARY

The attached Hemson Consulting report (Document 1) presents long-term forecasts for population, households, housing, and employment growth in the City of Ottawa to 2051.

The forecasts support the City's future Official Plan update and represent the first phase of a three-part growth management strategy, which includes the Council approved (October 2024) Urban and Village Boundary Expansion Framework. The Framework established a criteria and process for assessing boundary expansion, ensuring decisions are in accordance with the Provincial Planning Statement (2024) and aligned with local planning objectives. Under the Provincial Planning Statement (2024), municipalities must use the latest Ministry of Finance population forecasts as the basis for long-range planning for population, housing and employment growth. However, the Ministry of Finance does not provide direct housing or employment forecasts.

The forecasts confirm that Ottawa will continue to grow strongly over the next 25 years and will remain one of Ontario's fastest-growing large cities. Ottawa's population is projected to increase from approximately 1.15 million in 2024 to approximately 1.68 million by 2051—an increase of about 530,000 residents. Average annual growth of roughly 19,600 people per year is expected throughout the forecast period, exceeding historical averages and reflecting sustained long-term momentum rather than short-term fluctuations.

Population growth will be driven primarily by migration, particularly international immigration, with natural increase playing a smaller role over time as the population ages. These trends are consistent with provincial forecasts and broader demographic patterns across Ontario. Ottawa's growth outlook reflects its continued role as a major

economic, institutional, and employment centre with strong regional and national connections.

Ottawa's age structure will change significantly over the planning horizon. While all age groups are expected to grow, the largest increases will occur among working-age adults and seniors. Growth in the senior population—particularly those aged 75 and over—will be especially pronounced, increasing demand for accessible housing, health care, transit, and community services. At the same time, continued inflows of younger adults and families are expected to help maintain a relatively balanced age structure compared with many other municipalities. These trends underscore the need for planning that supports residents at all stages of life.

Household growth over the next 25 years is projected to increase by six per-cent compared to the previous 25 years. The number of households in Ottawa is expected to increase from just over 433,000 in 2024 to nearly 700,000 by 2051. This represents a sustained period of high housing demand, driven by population growth, aging-related household changes, and the release of pent-up demand among younger adults who delayed forming households in recent years due to affordability pressures.

The forecasts indicate a continued shift in the type of housing needed to accommodate future growth. While single-detached housing will remain part of Ottawa's housing mix, a growing share of new households is expected to be accommodated through apartments, row housing, duplexes, and additional residential units. Traditional and new-forms of apartments are projected to play an increasingly important role across a broader range of age-groups, including families and seniors. These trends reflect changing household sizes, affordability challenges, and preferences for more compact, accessible housing close to services and transit. The findings highlight the importance of providing a broad range of housing options and supporting intensification and “missing middle” housing forms, referred to as “additional residential units” (ARUs) in the projections report (Document 1).

Employment in Ottawa is also projected to grow significantly. Total employment is forecast to increase by approximately 325,000 jobs between 2024 and 2051, rising from about 669,600 to 994,600 jobs. Ottawa is expected to maintain its role as a major regional employment hub, supported by strong labour force participation, relatively low unemployment, and continued net in-commuting from surrounding communities. Growth will be supported by population-related employment and by the city's established strengths in public administration, health care, education, and professional and technology-based, including high-tech sectors.

Overall, the forecasts demonstrate that Ottawa is entering a prolonged period of sustained growth. Accommodating this growth will require coordinated planning for housing, infrastructure, transportation, employment lands, and community services. The forecasts provide a provincially compliant, evidence-based foundation for the City's Official Plan update and will inform subsequent phases of growth management, including land needs and settlement area analysis.

Staff Recommendation

Planning staff recommend adopting the updated population, household and employment projections prepared by Hemson Consulting in Document 1, which will serve as the demographic and economic foundation for the City's ongoing Official Plan update.

The updated growth projections represent Step 1 of a three-step process. Subsequent steps will address growth management strategy update and, if required, the identification of new settlement areas to accommodate projected growth.

Applicable Policy

The projections have been prepared in accordance with the Provincial Planning Statement, 2024, which requires municipalities to base long range planning on population and employment forecasts prepared by the Province. The Ministry of Finance population projections released in summer 2025 form the demographic basis for the analysis.

Additionally, the projections are consistent with the current and proposed update to the Provincial Methodology Guidelines, while ensuring the City's Official Plan remains aligned with anticipated population, housing and employment needs to the 2051 planning horizon.

SYNTHÈSE ADMINISTRATIVE

Le rapport d'Hemson Consulting ci-joint (pièce 1) fait état des prévisions à long terme pour la croissance de la population, des ménages, des logements et de l'emploi à Ottawa jusqu'en 2051. joint (pièce 1) fait état des prévisions à long terme pour la croissance de la population, des ménages, des logements et de l'emploi à Ottawa jusqu'en 2051. joint (pièce 1) fait état des prévisions à long terme pour la croissance de la population, des ménages, des logements et de l'emploi à Ottawa jusqu'en 2051. joint (pièce 1) fait état des prévisions à long terme pour la croissance de la population, des ménages, des logements et de l'emploi à Ottawa jusqu'en 2051.

Ces prévisions, qui viennent étayer la prochaine mise à jour du Plan officiel de la Ville, représentent la première phase d'une stratégie de gestion de la croissance en trois

volets, dont la Structure-cadre de l'extension du périmètre de la zone urbaine et des villages approuvée par le Conseil municipal (en octobre 2024). La Structure-cadre établit les critères et le processus de l'évaluation de l'extension du périmètre, en veillant à ce que les décisions soient conformes à la Déclaration provinciale sur la planification (2024) et à ce qu'elles correspondent aux objectifs de l'aménagement local. En vertu de la Déclaration provinciale sur la planification (2024), les municipalités doivent se servir des prévisions de la population les plus récentes du ministère des Finances pour établir leur planification à long terme d'après la croissance de la population, du nombre de logements et de l'emploi. Or, le ministère des Finances ne fournit pas de prévisions portant directement sur les logements ni sur l'emploi.

Les prévisions confirment qu'Ottawa continuera de connaître une vigoureuse croissance dans les 25 prochaines années et qu'elle restera l'une des grandes villes de l'Ontario dont la croissance est la plus fulgurante. Selon les projections, la population d'Ottawa devrait augmenter pour passer d'environ 1,15 million d'habitants en 2024 à 1,68 million d'habitants approximativement en 2051, soit une hausse de l'ordre de 530 000 résidents. On prévoit une croissance annuelle moyenne à raison d'environ 19 600 habitants par an sur tout l'horizon prévisionnel, ce qui dépasse les moyennes statistiques et laisse entrevoir une progression à long terme soutenue, plutôt que des fluctuations à court terme.

La croissance de la population sera essentiellement portée par la migration, surtout l'immigration internationale; l'augmentation naturelle de la population est appelée à jouer un rôle moindre au fil du temps, en raison du vieillissement de la population. Ces tendances cadrent avec les prévisions du gouvernement provincial et l'ensemble des modèles démographiques dans tout l'Ontario. Les perspectives de croissance d'Ottawa témoignent du rôle que continue de jouer la Ville comme grand centre économique, institutionnel et de l'emploi grâce à de solides liens régionaux et nationaux.

La structure des groupes d'âge d'Ottawa est appelée à évoluer considérablement sur l'horizon prévisionnel. Si l'on s'attend à ce que tous les groupes d'âge grandissent, c'est parmi les adultes en âge de travailler et les personnes âgées que la hausse sera la plus importante. Dans la population des personnes âgées — surtout celles qui ont 75 ans et plus —, la croissance sera particulièrement forte, ce qui aura pour effet d'augmenter la demande de logements accessibles, de soins de santé, de transports en commun et de services communautaires. Dans le même temps, les influx continus de jeunes adultes et de familles devraient permettre de préserver une structure d'âge relativement équilibrée par rapport à de nombreuses autres municipalités. Ces tendances mettent en relief la nécessité d'établir une planification qui répond aux besoins des résidents à toutes les étapes de la vie.

Sur les 25 prochaines années, la croissance des ménages devrait, selon les projections, s'établir à six pour cent par rapport aux 25 années précédentes. Le nombre de ménages d'Ottawa devrait augmenter pour passer d'un peu plus de 433 000 en 2024 à près de 700 000 en 2051. Au cours de cette période, la demande de logements est appelée à rester forte, portée par la croissance de la population, par les changements liés au vieillissement des ménages et par la détente de la demande refoulée parmi les jeunes adultes qui ont tardé à constituer des ménages dans les dernières années en raison des pressions que fait peser l'abordabilité.

Les prévisions indiquent que le type de logement nécessaire pour assurer la croissance projetée continuera d'évoluer. Alors que les maisons unifamiliales continueront de faire partie de l'éventail des logements d'Ottawa, une part croissante de nouveaux ménages devrait se loger dans des appartements, des maisons en rangée, des duplex et dans des logements supplémentaires. Les formes traditionnelles et nouvelles d'appartements devraient, selon les projections, jouer un rôle de plus en plus important dans l'ensemble des groupes d'âge, dont les familles et les personnes âgées. Ces tendances témoignent de l'évolution de la taille des ménages, des problèmes d'abordabilité et des préférences exprimées pour des logements plus compacts et accessibles, proches des services et des transports en commun. Les constatations dont fait état le rapport mettent en lumière l'importance d'offrir une vaste gamme d'options de logements et de promouvoir la densification et les formes de logements « intermédiaires manquants », appelées « logements supplémentaires » (LS) dans le rapport sur les projections (pièce 1).

D'après les projections, l'emploi à Ottawa devrait lui aussi croître considérablement. L'emploi total devrait s'enrichir d'environ 325 000 emplois entre 2024 et 2051, pour passer d'environ 669 600 à 994 600 emplois approximativement. Ottawa devrait continuer de jouer son rôle d'important carrefour d'emploi régional, grâce à sa forte participation à la population active, à son taux de chômage relativement faible et à l'afflux net soutenu de navetteurs provenant des collectivités environnantes. La croissance sera étayée par l'emploi généré pour servir la nouvelle population et par les forces établies de la Ville dans l'administration publique, les soins de santé, l'éducation, de même que dans les secteurs des professions et des technologies, dont celui de la haute technologie.

Dans l'ensemble, les prévisions démontrent qu'Ottawa entame une longue période de croissance soutenue. Pour assurer cette croissance, il faudra concerter la planification des logements, des infrastructures, du transport, des pôles d'emploi et des services à la collectivité. Ces prévisions, qui constituent un socle fondé sur la preuve statistique et conforme à la Déclaration provinciale pour la mise à jour du Plan officiel, viendront

éclairer les phases subséquentes de la gestion de la croissance, dont l'analyse des besoins fonciers et des zones habitées.

Recommandation du personnel

Le personnel des Services de planification recommande d'adopter la mise à jour des projections de la population, des ménages et de l'emploi préparée par Hemson Consulting dans la pièce 1, qui servira de socle démographique et économique dans la mise à jour en cours du Plan officiel de la Ville.

La mise à jour des projections de croissance constitue la première étape d'un processus qui se déroulera en trois étapes. Les étapes suivantes porteront sur la mise à jour de la stratégie de gestion de la croissance et, au besoin, sur le recensement des nouvelles zones habitées pour assurer la croissance projetée.

Politiques applicables

Les projections ont été préparées conformément à la Déclaration provinciale sur la planification de 2024, qui oblige les municipalités à établir leur planification à long terme d'après les prévisions de la population et de l'emploi préparées par le gouvernement provincial. Les projections de la population du ministère des Finances, publiées à l'été 2025, constituent le fondement démographique de l'analyse.

En outre, les projections cadrent avec les lignes directrices actuelles sur la méthodologie de projection du gouvernement provincial et la mise à jour que l'on propose d'y apporter, en veillant à ce que le Plan officiel de la Ville continue de concorder avec les besoins prévus liés à la croissance de la population, au logement et à l'emploi sur l'horizon prévisionnel de 2051.

Learn more about [link to Development Application process - Zoning Amendment](#)

For all the supporting documents related to this application visit the [link to Development Application Search Tool](#).

BACKGROUND

On June 25 2025, Council approved the Official Plan Update – Growth Projections Work Plan, described in report [ACS2025-PDB-PS-0041](#). The work plan established a three-step process to update the growth framework supporting the Official Plan:

1. Update population, household and employment projections;
2. Prepare a growth management strategy to determine settlement area land requirements; and

3. If required, identify and evaluate potential new settlement area lands.

The purpose of this report is to present step 1, the updated growth projections. City of Ottawa retained Hemson Consulting to complete the updated growth projections, as outlined in Document 1.

DISCUSSION

Population Projections

The growth projections begin with population projections, as they are the foundation for future housing and employment needs. As per the Provincial Planning Statement, 2024, population projections from the Ministry of Finance are to be the basis of municipal growth projections. Staff and Hemson reviewed the population projections released by Ministry of Finance in summer 2025, including their various growth components, and recommend that they be adopted as published. The Ministry of Finance projects Ottawa's population to reach **1,683,480** in 2051, representing a growth of **529,640** from 2024 to 2051. The Ministry of Finance projects that Ottawa will be the fastest growing single- or upper-tier municipality in Ontario over the next 25-years.

Population Projection Model



Household Projections

The Ministry of Finance does not provide household projections. The Province assists municipalities in the development of their own household projections through the current Projection Methodology Guidelines, dated 1995, and a proposed update to those guidelines. A summary of staff comments on the Province's proposed update was provided to Joint Planning and Housing Committee and Agricultural and Rural Affairs Committee on October 24, 2025 ([ACS2025-PDB-PS-0069](#)). Projected population growth is translated into housing demand through household projections. Households are estimated by applying age-specific headship rates, derived from historical census data to the projected population by five-year age cohorts.

Projected housing demand by dwelling type from the households is calculated by applying occupancy patterns by age group by dwelling types, such as single-detached, row-house, and apartment housing forms. Adjustments are made to account for anticipated vacancy rates and the replacement of demolished units.

Housing Projection Model



An emerging trend reflected in the forecast is the growing prevalence of younger households entering the housing market through dwellings that are defined as duplexes in the Census by Statistics Canada. These additional residential units (ARUs) include converted single-detached houses, basement suites, secondary suites, coach or laneway houses, as well as other innovative, ground oriented, units that the market may not have seen yet. The introduction of these “missing middle” housing types was supported by [Ontario Provincial Bill 23, the *More Homes Built Faster Act \(2022\)*](#), which aimed to accelerate construction, and are permitted in our current and new Zoning By-laws.

There are, however, important limitations in how ARUs are captured in Census data. When an ARU is added to a lot containing an existing dwelling—either as an internal second unit or as an accessory structure such as a laneway house or garden suite—Statistics Canada reclassifies both dwellings as a duplex. This reclassification removes the original unit from the counts of single-detached, semi-detached, or row housing. The issue is compounded by the fact that Statistics Canada does not subsequently revert the classification of the original dwelling if the second unit is later removed from the market and reintegrated into the primary unit, which is a common occurrence.

To address this problem, and reflect the growing role of ARUs, dwelling units classified as duplexes by Statistics Canada have been recategorized where appropriate to better represent their function as secondary residential units capable of accommodating a range of household types. For example, a single-detached dwelling with a basement suite is treated as one single-detached unit plus one ARU, rather than as two duplex units. This approach provides a more accurate representation of the housing stock and avoids overstating shifts away from ground-related housing forms.

Using this methodology, the projections indicate a sustained increase in the number of households in Ottawa to 2051. These projections will inform future housing need assessments, intensification targets, and land supply analysis. The projected number of households in Ottawa in 2051 is **691,550**, representing a growth of **257,752** from 2024 to 2051.

Employment Projections

Similar to household projections, the Ministry of Finance does not provide employment projections, which are also included in the Province's Projection Methodology Guidelines. Employment projections are based on the population projections and then apply a labour force rate by age and sex, unemployment rate, and accounts for commuting patterns within the region, and those that have more than one job.

Employment Projection Model



As one of Ontario's fastest growing municipalities, a strong local economy with employment opportunities are reflected in the population projections where most of the growth will occur through all migration streams. About two-thirds of the population growth are within the typical working ages of 15 to 64, and more than 20 per cent of those 65 and over are projected to continue participating in the labour force.

Employment growth is differentiated by economic sector and land-use type. Population-related employment, major office employment, employment land uses (such as industrial and warehousing), and rural employment each have distinct built-form and location requirements. Work-from-home trends are also considered, recognizing their influence on both employment location and commuting behaviour. Sub-sectors such as high-tech, artificial intelligence, data centres, last-mile logistics and warehousing, and military and defense uses, among many others, are included within the main categories.

The projections forecast employment by land use category. The categories reflect the types of land and built forms typically required to accommodate different kinds of employment activity, and include:

- **Urban Major Office** – Large freestanding office buildings (generally over 20,000 square feet), typically located within the urban area. Ottawa has a high share due to federal government and tech employment. Long-term forecasts are inherently uncertain because they depend on federal office space policies.

- **Urban and Rural Population-Related** – Local service jobs such as retail, institutional, cultural, entertainment, and tourism uses, mainly planned within community areas within the urban area and include villages. Growth tracks population growth.
- **Urban and Rural Employment Land** – Jobs within designated employment areas, including manufacturing and related uses like warehousing, storage, transportation, and distribution. These lands refer to future jobs within Employment Areas, consistent with the Provincial Planning Statement (2024), which the Official Plan refers to through its Industrial & Logistics and Rural Industrial designations.
- **Rural-based Sector** – Employment in rural areas outside of villages, including agriculture, primary industries, and small-scale commercial and service uses supporting rural populations outside of villages.
- **Work at Home** – Employees working full-time from home (excluding hybrid workers). Elevated during COVID-19 and forecast to remain modestly above pre-pandemic levels due to lasting shifts in work patterns.

Net in-commuting from surrounding municipalities is incorporated to reflect Ottawa's role as a regional employment centre. A multiple jobholder factor is applied to account for individuals holding more than one job.

Based on this analysis, employment in Ottawa is projected to grow significantly to 2051. These projections will support planning for employment lands, transit, and infrastructure. The projected number of jobs in Ottawa in 2051 is **994,600**, representing a growth of **325,000** from 2024 to 2051.

RURAL IMPLICATIONS

The updated growth projections apply citywide and include both urban and rural population and employment growth. The projections will inform future analysis of rural settlement capacity, servicing requirements, and agricultural land protection as part of the growth management strategy and subsequent Official Plan update phases.

CONSULTATION

At this stage, the work focuses on the preparation of technical growth projections. Public consultation will be undertaken during later phases of the Official Plan update, including any consideration of new settlement areas. Engagement activities will be reported to Committee and Council at that time.

LEGAL IMPLICATIONS

Conclusions reached in a process such as a growth management review are not final until the end of the process. However, it is the opinion of Legal Services that one of the lessons learned from past hearings on matters that go through an extended official plan process that significant weight is given to the interim conclusions reached through the process where such interim conclusions were based sound planning rationale. While there is no right of appeal of an official plan (or amendment) resulting from a *Planning Act*, section 26 comprehensive review process (the Minister may refer the matter to the Ontario Land Tribunal for either a recommendation or a decision), it can be expected that the Minister's attention will be brought to changes in direction if such occur in the review.

Thus, while it is possible to revisit decisions made earlier in the process, and Members of Committee and Council must always be capable of being persuaded as new information and submissions are brought forward, it is to be expected that the final decisions made by Council at the culmination of the growth management review will build upon the determinations made through the process.

RISK MANAGEMENT IMPLICATIONS

There may be the perception that adopting long-term projections that could change significantly, such as federal immigration policy, state of the economy, construction costs, and logistics supply-chain, risks planning for too much or little growth. Planning for too much growth through more contingency measures than required, risks not receiving the required financing for planned infrastructure and service investments.

Municipalities are required to update their Official Plans every five years, which includes a review of growth projections and any significant deviation from their original adoption. The City also monitors residential and industrial land supply annually. The Provincial Planning Statement (2024) requires the ability to accommodate residential growth for a minimum of 15-years so that a sufficient amount of land is always available in the short- and medium-term horizons. These regular and frequent monitoring programs provide opportunities to correct significant deviation from adopted projections as required.

ASSET MANAGEMENT IMPLICATIONS

Adopting these projections updates the City's long-range demand baseline used to size and phase infrastructure planning across the City's central servicing and transportation systems. This baseline will be carried forward into the next step of Council's growth framework update, with the growth management strategy reporting back in Q2 2026,

and then into the subsequent Official Plan update work that will identify where growth is to be accommodated.

FINANCIAL IMPLICATIONS

There are no direct financial implications.

ACCESSIBILITY IMPACTS

The growth projections provide a foundation for any accessibility programs that rely on future population by age by providing an update on the age structure to 2051. The forecasts indicate rapid growth in older adult cohorts, particularly residents aged 75 and over, and provides a basis for estimating growth among people with disabilities and diverse household types.

These trends will increase demand for accessible housing, barrier-free transportation, age-friendly community design, and inclusive access to City services and facilities. Growth in apartment living and compact housing forms presents opportunities to improve accessibility through proximity to transit, services, and amenities, provided accessibility requirements are incorporated early in planning and design.

Accessibility considerations have been incorporated into the broader growth and land-use planning framework to support compliance with the *Accessibility for Ontarians with Disabilities Act (AODA)*, and the City of Ottawa's Accessibility Policy. Ongoing engagement with accessibility stakeholders and continued application of universal design principles will be important to ensure population growth does not create new barriers and instead improves access for residents of all abilities.

ENVIRONMENTAL IMPLICATIONS

Population growth will place pressure on land, water, and natural systems if not carefully managed. Increased demand for housing and employment space may affect green spaces, environmentally sensitive areas, and water resources. Ongoing compliance with municipal, provincial, and federal environmental policies and regulations will be required as part of the growth management and Official Plan processes.

TERM OF COUNCIL PRIORITIES

The recommendations support the 2023-2026 Term of Council Priorities, including a city that is more liveable and affordable, more connected, green and resilient, and economically prosperous, by establishing a sound evidence base for future planning decisions.

SUPPORTING DOCUMENTATION

Document 1 – Growth Forecasts to 2051 prepared by Hemson Consulting

DISPOSITION

Following Council approval, Planning Services will use the adopted growth projections to update the growth management strategy of the Official Plan and will report back to Committee and Council in Q2 2026.