**REVIEW OF EXISTING
HOUSING UNIT CAPACITY IDENTIFIED IN
MUNICIPAL LAND NEEDS ASSESSMENTS
PREPARED FOR
UPPER- AND SINGLE-TIER MUNICIPALITIES
IN THE GREATER GOLDEN HORSESHOE**

Prepared for: The Alliance for a Liveable Ontario

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Executive Summary

Good policy development requires a clear understanding of the nature and scope of the problems faced, as well as the potential impacts of the various solutions proposed to resolve them. This report is intended to help inform the on-going debate about how best to resolve housing supply and affordability issues within the Greater Golden Horseshoe (GGH). The analysis in this report relies on data presented in land needs assessments (LNAs) prepared for upper- and single-tier municipalities in the GGH as part of the process of bringing their official plans into conformity with the 2019 Growth Plan for the Greater Golden Horseshoe (Growth Plan).

The Province of Ontario (Province) has embarked on a series of initiatives to address housing supply and affordability issues. Included in these initiatives is the establishment of new 2031 housing targets for 29 municipalities throughout Ontario, 25 of which are in the GGH. These new housing targets are based on what appears to be an arbitrarily chosen overall target for Ontario of 1.5 million new housing units to be built by 2031. The portion of this overall target specifically allocated to the 25 GGH municipalities is 1.01 million housing units (see Appendix A).

Observations arising from the analysis in the report include:

1. The existing capacity for new housing in Built-Up Areas (BUA), Designated Greenfield Areas (DGA), and rural areas at the time the LNAs for the upper- and single-tier municipalities in the GGH were completed **exceeded 2.0 million units**. This existing capacity **does not include** capacity associated with any new lands added to urban areas through the recently completed conformity updates to official plans, or additional lands removed from the Greenbelt to accommodate new housing.

2. Existing capacity for new housing identified within the LNAs (2.05 million units) was more than double the cumulative total of the new housing targets specifically assigned to the 25 GGH municipalities (1.01 million). No additional overall housing capacity was required in the GGH to meet its share of the 1.5 million housing target.

3. Existing capacity for new housing is well distributed across municipalities in the GGH, with just over a third being located within DGA and rural areas, and just under two thirds being capacity for intensification within BUA.

4. The housing crisis currently faced in Ontario relates to both supply and affordability. New housing having access to transit within the BUA has the potential to help resolve both these issues, particularly when considered in the context of the associated cost of transportation. There is no indication this can similarly be achieved through construction of more low-density dwellings in car dependent greenfield areas.

5. The need for additional purpose-built rental units in multi-residential buildings being identified by BILD and other housing groups represents an ideal use for intensification capacity. BUA lands with access to transit represent some of the best locations for affordable housing.

6. The aging population provides a significant market for intensification if a continuum of desirable age appropriate/supportive housing units are brought onto the marketplace.

7. The type of housing people choose to occupy is based on a variety of factors such as affordability, life-style choices, housing type availability, tenure options, climate change mitigation requirements, transportation costs, transportation mode availability, family size, family formation timeframes, educational options, work at home opportunities, multi-generational responsibilities, expected length of retirement, life expectancy, availability of family support, and community supported planning objectives. Many of these factors that underly housing choices being made today in the GGH are significantly different than they were 20 years ago, with every indication being that such change will continue to occur well into the future.

8. Most LNAs use past purchasing tendencies of homebuyers to determine the mix of housing required to accommodate future growth. The use of the past to predict future housing need in this rapidly changing housing environment typically results in higher than realistic forecasts for single-detached units and lower than realistic forecasts for apartments. Where the past is used to predict the future, evolving conditions affecting housing purchases (like the increasing ability for people to work from home), conditions which have only recently arisen (like the current focus on and availability of gentle intensification), and predictable conditions that may not yet exist (like planned near-term investments in future rapid transit projects) play little or no role in such forecasts despite significantly influencing future housing choice.

9. It is completely unrealistic to assume the affordable housing crisis we face today will be solved by the private sector. That is not the business they are in. Ultimately, the affordable housing crisis will only be resolved through partnerships between the Federal government, the Province, municipalities, non-profits, co-operatives, charitable organizations and other agencies. The private sector will play a supporting role in this process, but simply providing them with more urban designated land in the vain hope that somehow this will result in more and cheaper homes being built faster is not a realistic solution. Neither are the other extreme measures identified in the report that have been proposed and/or implemented by the Province.

1.0   Introduction

This report has been prepared for the Alliance for a Liveable Ontario and is intended to help inform on-going debate about how to resolve housing supply and affordability issues within the Greater Golden Horseshoe (GGH).

Over the past several months the Province of Ontario (Province) has commenced a series of housing related initiatives (including Bill 23, Bill 39, and removal of lands from the Greenbelt), with the stated intent being to build 1.5 million new homes in Ontario by 2031. The stated purpose of these initiatives is to resolve on-going housing supply and affordability issues.

While some of the measures proposed through these Provincial initiatives will assist in achieving increased levels of new housing construction through intensification (the construction of new homes within the already built up areas of communities), others, which seek to expand the amount of land available for greenfield development, are seen by critics of the Provincial initiatives as regressive in the context of decades long efforts to create liveable, climate resilient, and environmentally and fiscally sustainable communities within the GGH.

As part of these Provincial initiatives, 29 municipalities throughout Ontario are being required to commit to meeting new housing targets established by the Province. The vast majority (25) of these municipalities are located within the GGH. These new housing targets cumulatively require these 25 GGH municipalities to commit to facilitating creation of 1.01 million new housing units over the 10-year period ending in 2031. These new housing targets can be found in Appendix A to this report.

The stated need to build what appears to have been an arbitrarily selected target of 1.5 million new homes over the 10-year period ending in 2031 is also being touted by the Province as justification for the use of other extreme measures. To date, these measures have included:

- Adding thousands of hectares to urban areas over and above those supported by Councils through Ministerial modifications to municipal official plans

- Removal of approximately 3,000 ha (7,400 acres) of land from the Greenbelt

- Proposed use of Minister's Zoning Orders to facilitate development of additional low-density housing units in greenfield areas

- Proposed elimination of upper-tier official plans and municipal planning functions

- Significant curtailment of Conservation Authority planning functions

- Potential forced sale of lands owned by Conservation Authorities capable of accommodating future housing

- Proposed elimination of the Growth Plan for the Greater Golden Horseshoe (Growth Plan)

Key to evaluating the appropriateness of these measures is understanding the range of opportunities already existing within urban areas in the GGH to accommodate new housing. If a significant portion of the new housing growth required can reasonably be accommodated on lands previously planned to accommodate urban development, the need for such extreme measures is effectively negated.

New housing construction can occur (working from the inside outward) through:

- Intensification within Built-up Areas (BUA) of communities. The areas constituting BUA in the GGH were defined by the Province in 2008 and have previously been incorporated into the respective municipal official plans. Only new housing constructed within the BUA is counted towards achievement of a municipality's intensification target

- Intensification within recently built Designated Greenfield Area (DGA). The DGA is the area between the BUA and the settlement area boundary. New housing constructed within the DGA does not count towards achievement of a municipality's intensification target

- New greenfield development within the DGA as it existed prior to the most recent updates to official plans. These updates were required to bring official plans into conformity with the 2019 Growth Plan (conformity updates)

- New greenfield development on lands within new DGA added to urban areas by municipalities through the most recent conformity updates to their official plans

- New greenfield development on lands within new DGA added to urban areas by the Minister of Municipal Affairs and Housing over and above that supported by municipal Councils through Minister's modifications to their official plans

- New development within rural areas (including Rural Settlement Areas) permitted by a municipality's official plan

- New development currently within rural areas permitted through Minister's Zoning Orders

With the coming into force of the 2019 Growth Plan, all upper- and single-tier municipalities in the GGH were required to update their official plans to the 2051 planning horizon through what is referred to as a municipal comprehensive review process (MCR).

As part of the completion of an MCR, municipalities are required to determine if any urban area expansions are required to meet forecasted growth to 2051. Such determination is made through the completion of a land needs assessment (LNA) that identifies the available capacity of already designated lands, determines the types of housing units required to accommodate the forecasted population (housing-by-type forecast), determines where housing growth will occur in the municipality, and using this information determines what (if any) need exists for additional urban area to accommodate forecasted growth. The methodology used to undertake an LNA needs to comply with the Provincial Land Needs Assessment Methodology for the Greater Golden Horseshoe (LNA Methodology).

This report uses data derived from recently completed upper- and single-tier LNAs to determine the cumulative capacity of lands previously designated for urban development to accommodate the Province's new housing targets. This report only addresses capacity for new housing associated with the lands described in 1, 2, 3 and 6 above (existing capacity).

2.0 Existing Capacity for New Housing Units Identified in GGH Upper- and Single-Tier Municipal Land Needs Assessments

Existing capacities for each of the 21 upper- and single-tier municipalities in the GGH are presented in Figure 1. All data presented in Figure 1 was derived from on-line versions of municipal LNAs, except for

BUA data for the City of Toronto. The City of Toronto is not required to complete an LNA as no urban area expansions are possible. Data presented in this report relating to the City of Toronto was derived from the 2021 Census and the Greater Golden Horseshoe: Growth Forecasts to 2051 (Hemson, August 26, 2020) and represents its forecasted housing growth to 2051.

FIGURE 1:   Existing Capacity for New Housing Units Identified in GGH Upper- and Single-Tier Municipal Land Needs Assessments

Municipality	Minimum Existing BUA Capacity (units)	Existing DGA/Rural Area Capacity (units)	Minimum Existing DGA/Rural Area/BUA Capacity (units)
INNER RING			
City of Toronto	382,910	0	382,910
Region of Peel	149,000	74,000	223,000
Region of York	146,300	102,400	248,700
Region of Durham	112,860	81,498	194,358
Region of Halton	110,500	111,800	222,300
City of Hamilton	87,650	22,670	110,320
OUTER RING			
Northumberland County	2,550	16,540	19,090
City of Peterborough	10,500	13,170	23,670
Peterborough County	1,440	9,650	11,090
City of Kawartha Lakes	2,430	16,570	19,000
Simcoe County	34,834	85,750	120,584
City of Barrie	38,440	27,163	65,603
City of Orillia	3,360	2,754	6,114
Dufferin County	1,959	5,838	7,797
Wellington County	3,210	14,775	17,985
City of Guelph	12,470	16,280	28,750
Region of Waterloo	181,555	48,422	229,977
Brant County	5,042	9,850	14,892
City of Brantford	13,339	7,763	21,102
Region of Niagara	62,010	26,362	88,372
Haldimand County	2,231	10,532	12,763
INNER RING	989,220	392,368	1,381,588
OUTER RING	375,370	311,419	686,789
GGH Total	1,364,590	703,787	2,068,377

Note: Sources and associated assumptions are as outlined in Appendix B

3.0   Observations

1.   The existing capacity for new housing in BUA, DGA, and rural areas at the time the LNAs for the upper- and single-tier municipalities in GGH were completed **exceeded 2.0 million units**. This existing capacity **does not include** capacity associated with any new lands added to urban areas through the recently completed conformity updates to official plans, or additional lands removed from the Greenbelt to accommodate new housing.

2.   Existing capacity for new housing identified within the LNAs (2.05 million units) was more than double the total of the new housing targets assigned to the 25 GGH municipalities (1.01 million). No additional overall housing capacity was required in the GGH to meet its share of the 1.5 million housing target.

3.   Approximately 700,000 units of the existing capacity for new housing units was in DGA.

4.   The majority of DGA on which these 700,000 new housing units can be accommodated are already the subject of plans of subdivisions in various stages of the approval process. All of this DGA was designated for urban development a minimum of 10 years ago and servicing for these lands should already have been secured through updates to municipal infrastructure masterplans.

5.   Approximately 1,360,000 housing units of intensification capacity existed in BUA at the time of completion of the LNAs. While a portion of this intensification inventory is specifically noted in the LNAs as being assumed to occur later in the 2021 to 2051 planning period, sufficient capacity exists within BUAs to accommodate much higher rates of construction than is currently being experienced.

6.   There is broad distribution of this existing housing capacity throughout all municipalities in the GGH, with LNAs demonstrating that many municipalities require little or no urban area expansions to accommodate the Growth Plan's 2051 population forecasts.

7.   Intensification capacities to accommodate new housing within BUA as identified by the LNAs should be considered as minimums.

      Many municipalities only acknowledged that capacity to accommodate the levels of intensification required to meet their proposed intensification targets to 2051 was available. These municipalities did not attempt to quantify intensification capacity beyond these targets, although several observed that opportunities for accommodating additional intensification exist. For example, the Region of Peel LNA identifies the need for development accommodating 674,700 additional people and jobs to ultimately meet the minimum density targets within its Major Transit Station Areas (MTSAs). The Region of York likewise identified the need for 505,000 additional people to meet the density targets within its MTSAs. These requirements, which represent only one component of intensification[1], would meet or in the case of the Region of

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[1] In addition to development within MTSAs, priorities identified by the Growth Plan for intensification (housing construction within BUA) include *urban growth centres*, development within other nodes and corridors, and other opportunities through infill, *redevelopment*, *brownfield sites*, the expansion or conversion of existing buildings, and *greyfields*. More recently, additional emphasis has also been given to the importance of gentle intensification (accessory units) and missing middle development.

York, far exceed the levels of intensification necessary to meet the intensification targets for 2051 identified in the LNAs.

Capacity for intensification is to a great extent driven by the marketplace, availability of servicing capacities, and investment in transit services. Assessments of the amount of potential capacity in maturing urban areas will typically increase over time as different and higher density forms of development gain acceptance. Capacities for intensification in places like the City of Hamilton, which is planning for future implementation of almost 50 kilometers of higher order transit services, is almost limitless if there is a strong local economy, planning for a liveable higher density community is in place, and the right market conditions exist.

8. While intensification capacity makes up almost two thirds of the existing capacity for new housing in the GGH, **this should be seen as an opportunity** rather than a constraint.

9. The housing crisis currently faced in Ontario relates to both supply and affordability. Housing having access to transit within the BUA has the potential to help resolve both these issues, particularly when considered in the context of the associated costs of transportation. There is no indication this can similarly be achieved through construction of more low-density dwellings in car dependent greenfield areas.

10. The need for additional purpose-built rental units in multi-residential buildings being identified by BILD and other housing groups represents an ideal use for intensification capacity. BUA lands with access to transit represent some of the best locations for affordable housing.

4.0 Additional Factors Favoring Increased Rates of Intensification

4.1 Historical-Based Land Needs Assessments Typically Over-Estimate the Need for Housing Capacity in Designated Greenfield Areas

A key step in the LNA Methodology is determining the number of each type of new home (single-detached , semi-detached, rowhouse, apartment and accessory units) required to accommodate forecast population growth. The LNA Methodology dictates that this is to be accomplished through the application of age-specific "propensities to occupy specific dwelling types" to "forecasts of households by age", calculated using household formation rates.

The propensities (tendencies) of individuals to occupy specific types of dwelling units can be determined in two ways:

- Documenting the housing choices people have made in the past and extrapolating this forward onto future populations (historical-based propensities); or
- Projecting how people will act in the future with respect to housing choice taking into consideration past tendencies as well as evolving conditions, conditions which have only recently arisen, and predictable conditions that may not yet exist (forecasted propensities).
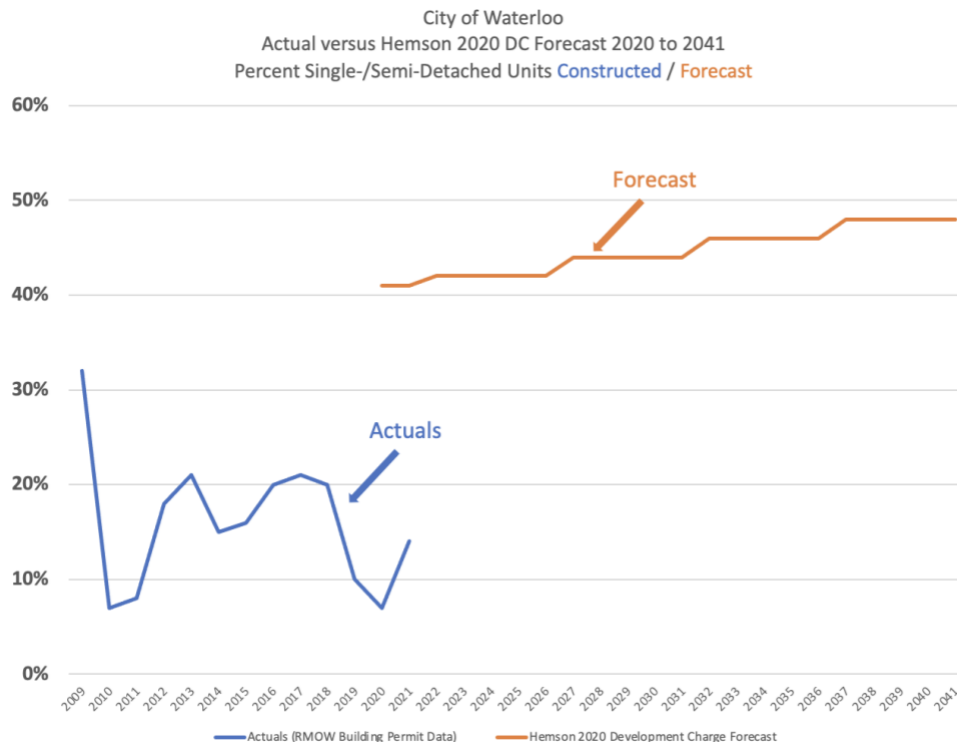
Traditionally, land economists have used historical-based propensities to determine the amount of each type of housing required in the future. While they may be easier to determine, historical-based

propensities fail to account for the changing environment within which decisions regarding what type of housing people need, want, or can afford are being made. For example, considerations related to affordability, life-style choices, housing type availability, tenure options, climate change mitigation requirements, transportation costs, transportation mode availability, family size, family formation timeframes, educational options, work at home opportunities, multi-generational responsibilities, length of retirement, life expectancy, availability of family support, and community supported planning objectives are all key factors in determining where and in what type of housing people will live throughout the various phases of their lives.

Historical-based propensities, which in some cases are reflective of decisions made by homebuyers decades ago, fail to incorporate many of the changing factors affecting recent and future housing choice.[2] The result is a housing by type forecast that in some cases mirrors the distant past, rather than reflecting the prosperous and sustainable future anticipated by the Growth Plan.

Considerations underlying housing choice in the GGH today are significantly different than they were 20 years ago, and every indication is that such change will continue to occur well into the future.

The use of historical-based propensities in a rapidly changing decision-making environment can result in poor (and sometimes even absurd) outcomes. The forecast prepared for the City of Waterloo's 2020 Development Charges Background Study provides a striking example of the failure of forecasts using historical-based propensities to reasonably project future housing choice (see below).

City of Waterloo
Actual versus Hemson 2020 DC Forecast 2020 to 2041
Percent Single-/Semi-Detached Units Constructed / Forecast

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[2] For example, in the Region of Waterloo housing-by-type forecasts using historical-based propensities are determined almost exclusively using data from residential unit purchases made before the ION LRT system was operational (residential units purchased pre-June 2019), whereas proximity to rapid transit is expected to be a significant factor in a much higher percentage of residential unit purchases in the future.

Not even half of the percentage of single- and semi-detached units forecast annually from 2020 to 2041 were built in the City of Waterloo at any time since 2009 (despite having had approved single-detached lots available). **In the first two years of the forecast**, the City of Waterloo issued building permits equal to 72% of all the apartments (2,245) anticipated by the forecast to 2029 (3,124) and 35% of the apartments anticipated to 2041 (6,404).

Examples of this type of variation between historical-based housing-by-type forecasts and what was actually built can be found throughout the Province. **In virtually every case, the housing-by-type forecast predicted significantly more single-detached units and fewer apartments than were built**.

The Growth Plan was established to create/facilitate change in urban form as a means of addressing the negative outcomes associated with decades of construction that resulted in low density single-detached dominated suburbs. Key objectives of the Growth Plan include significantly increasing intensification, creation of a broader mix of housing types in DGA, creation of transit supportive communities and promotion of active transportation.

The more successful the implementation of the Growth Plan is at creating such change, the less accurate historical-based propensities become. Municipalities throughout the GGH have made considerable strides in implementing the Growth Plan, with significant increases in intensification and delivery of a more balanced mix of housing units being among the most obvious changes. The use of historical-based propensities does not produce reliable housing-by-type forecasts where change of this nature has and continues to occur. By over predicting the demand for single-detached units and under predicting demand for apartments, historical-based LNAs typically result in more greenfield land being brought into the urban areas than is needed to accommodate forecasted growth.

4.2 Accessory Dwelling Units Appear to be Significantly Under-Represented in Capacities for New Housing Identified in LNAs

One of the intriguing changes occurring in the housing market today relates to the increasing prevalence of gentle intensification (typically associated with the construction of additional housing units on lots occupied by single-detached dwellings). With few exceptions, the potential for gentle intensification appears to have been significantly under-represented in LNAs throughout the GGH. For example, the Region of Waterloo LNA projects 3,200 accessory units will be built between 2019 and 2051 (a rate of 100 units per year). In a report last year to Region of Waterloo Council, staff stated:

> Over the past decade, there has been rapid growth in accessory apartments added to existing dwelling units, such as basement suites or duplex conversions. In 2012, only 67 permits were issued for these units across the Region. By 2020, the number reached 398, and increased by a further 37 per cent to 546 units in 2021 – that is, nine per cent of total residential units.

In the first two years of the 32-year forecast, building permits were issued for 944 (30%) of the 3,200 accessory units forecast in the Region of Waterloo.

This phenomenon is not just being experienced in large municipalities. The City of Orillia LNA anticipated 340 accessory units would be built over the 30-year period from 2021 to 2051 (a rate of just over 11

units per year). In the first 15 months of the 30-year forecast, building permits were issued for 76 (22%) of the 340 accessory units forecast in the City of Orillia.

The potential failure of LNAs to have properly considered the potential impact of emerging trends toward rapidly increasing amounts of gentle density is referenced in several LNAs as requiring additional investigation.

4.3 The Aging Population Requires a Rethinking of the Housing Market

According to the 2021 Census, approximately 60% of all dwelling units in the Province of Ontario are occupied by one or two people, with 26% of private dwelling units having only one person living in them. Despite representing approximately 60% of all housing units, collectively these units house only 36% of the population.

Ground-related units (singles/semis/row houses) collectively represent approximately 70% of all dwelling units in the Province. At minimum, over 40% of ground-related units are currently occupied by one or two residents, despite typically having capacity to house between three and six people. A large percentage of these one and two occupant ground-related units are occupied by seniors.

While no one is suggesting seniors should be forced to move out of their existing housing units, creating a wide range of housing opportunities for seniors in desirable age appropriate/supportive units has the potential to free up capacity in the existing housing supply. While building a senior(s)-oriented apartment or accessory unit adds only one or two persons worth of new housing capacity, in some cases construction of such units potentially frees up an existing single-detached unit to accommodate a growing young family.

Seniors represent a significant potential market for intensification units, including accessory units. This is particularly true within small communities where the existence of incredibly high percentages of single-detached units currently offers little opportunity for access to the alternative forms of housing necessary to accommodate aging Baby Boomers wishing to live out their lives in the communities in which they now reside.

5.0 Conclusions

Good policy development requires a clear understanding of the nature and scope of the problems faced and the potential impacts of the various solutions proposed to resolve them. This report is intended to help inform the on-going debate about how best to resolve housing supply and affordability issues within the GGH. The analysis in this report relies on data presented in upper- and single-tier municipal LNAs.

These upper- and single-tier LNAs were prepared using a methodology set out by the Province that permits (but does not require) the use of historical-based propensities for determining future housing choice. Historical-based housing-by-type forecasts tend to over-represent the need for single-detached units while under-representing the potential for apartment construction. As a result, historical-based LNAs typically result in more greenfield land being brought into the urban areas than is needed to accommodate forecasted growth.

Even using these conservative assumptions, the LNAs reviewed demonstrated that:

1. The existing cumulative capacity for new housing in BUA, DGA, and rural areas in upper- and single-tier municipalities in the GGH at the time of completion of the required LNAs **exceeded 2.0 million units**. This existing capacity **does not include** capacity associated with any new lands added to urban areas through the recently completed conformity updates to official plans, or additional lands removed from the Greenbelt to accommodate new housing.

2. Existing capacity for new housing identified within the LNAs prepared for upper- and single-tier municipalities in the GGH (2.05 million units) was more than double the total of the new housing targets specifically assigned to the 25 GGH municipalities (1.01 million). No additional overall housing capacity was required in the GGH to meet its share of the 1.5 million housing target.

3. Many municipalities required extremely limited or no urban area expansions to accommodate population growth forecast by the Growth Plan to 2051.

4. The housing crisis currently faced in Ontario relates to both supply and affordability. Housing within the BUA has the potential to help resolve both these issues, particularly when considered in the context of the associated costs of transportation. There is no indication this can similarly be achieved through construction of more low-density dwellings in greenfield areas.

5. The need for additional purpose-built rental units in multi-residential buildings being identified by BILD and other housing groups represents an ideal use for intensification capacity. BUA lands with access to transit represent some of the best locations for affordable housing.

6. The aging population provides a significant market for intensification as many seniors living in single-detached units today may well choose to move on to other forms of housing if desirable age appropriate/supportive housing units are brought onto the marketplace. These types of units are ideal for the use of existing intensification capacity within BUA, in part because they have the potential to help facilitate aging in neighbourhood that is important to many seniors.

7. It is completely unrealistic to assume the affordable housing crisis we face today will be solved by the private sector. That is not the business they are in. Ultimately, the affordable housing crisis will only be resolved through partnerships between the Federal government, the Province, municipalities, non-profits, co-operatives, charitable organizations and other agencies. The private sector will play a supporting role in this process, but simply providing them with more urban designated land in the vain hope that somehow this will result in more and cheaper homes being built faster is not a realistic solution. Neither are the other extreme measures proposed by the Province.

Appendix A: New Provincial Housing Targets by Municipality to 2031

Municipality	Housing Target
City of Toronto	285,000
City of Ottawa	151,000
City of Mississauga	120,000
City of Brampton	113,000
City of Hamilton	47,000
City of London	47,000
City of Markham	44,000
City of Vaughan	42,000
City of Kitchener	35,000
Town of Oakville	33,000
City of Windsor	13,000
City of Richmond Hill	27,000
City of Burlington	29,000
City of Oshawa	23,000
City of Barrie	23,000
City of Guelph	18,000
City of Cambridge	19,000
Town of Milton	21,000
Town of Whitby	18,000
City of St. Catharines	11,000
Town of Ajax	17,000
City of Waterloo	16,000
City of Kingston	8,000
City of Brantford	10,000
Clarington	13,000
City of Pickering	13,000
City of Niagara Falls	8,000
Town of Newmarket	12,000
Town of Caledon	13,000
Totals	**1,229,000**

Note: The Cities of Ottawa, London, Windsor, and Kingston are located outside of the GGH. The remaining 25 municipalities are located within the GGH and have been allocated housing targets with a cumulative total of 1,010,000 housing units.

Appendix B: Sources / Assumptions

INNER RING

City of Toronto

2021 Census of Canada

Greater Golden Horseshoe: Growth Forecasts to 2051 (Hemson Consulting Ltd, August 26, 2020)

- Intensification capacity derived by subtracting housing units identified in the 2021 Census from 2051 housing unit target contained in Greater Golden Horseshoe: Growth Forecasts to 2051 (Hemson Consulting Ltd, August 26, 2020) - Appendix B.

Region of Peel

Region of Peel 2051 Land Needs Assessment Report (Spring 2022)

Update to Land Needs Assessment Arising from Strategic Decisions to Finalize Proposed Region of Peel Official Plan Amendment as Part of Peel 2051 (Hemson Consulting Ltd, April 28, 2022)

Region of York

Report of the Commissioner of Corporate Services and Chief Planner - Proposed 2051 Forecast and Land Needs Assessment (March 18, 2021) as further updated (July 2022)

Region of Durham

Durham Region Growth Management Study (G.M.S.) – Phase 2 Area Municipal Growth Allocations and Land Needs, 2051 Final Report (Watson and Associates, October 17, 2022

- Vacant existing DGA capacity calculated using an assumed density of 17 units per ha.

Region of Halton

Land Needs Assessment – Halton Regional Official Plan Review (Hemson Consulting Ltd, February 2022)

City of Hamilton

City of Hamilton Land Needs Assessment to 2051 - Technical Working Paper - – Summary of Results (Lorius and Associates, March 2021) and October 2021 Addendum

- The Lorius report has been used to establish the existing capacity for housing in the DGA and rural areas. The remainder of housing units required to accommodate forecasted development have been assumed to be intensification units consistent with Council adoption of a no expansion option. As previously noted in the report, the City of Hamilton will have almost unlimited potential for intensification over time as it reshapes itself into a denser liveable community anchored on higher order transit.

OUTER RING

County of Northumberland

Northumberland County 2021 OP Review - Municipal Comprehensive Review - Urban Land Needs Analysis - Draft Report Executive Summary (Watson and Associates, 2021)

- Vacant existing DGA surplus capacity calculated using an assumed density of 10 units per ha.

City of Peterborough

Municipal Comprehensive Review: Land Needs Assessment, City of Peterborough Official Plan Review (City of Peterborough, June 2021)

County of Peterborough

County of Peterborough Growth Analysis Report (Hemson Consulting Ltd, March 28, 2022)

City of Kawartha Lakes

City of Kawartha Lakes Growth Management Strategy Presentation (Watson and Associates / Dillon Consulting, January 10, 2023)

- Assumed 15% intensification target consistent with similar municipalities.
- Intensification capacity deducted from 19,000 unit overall capacity to determine DGA and rural area capacity.

County of Simcoe

County of Simcoe Growth Forecasts and Land Needs Assessment (Hemson Consulting Ltd, March 31, 2022)

Revised County of Simcoe Growth Forecasts and Land Needs Assessment (Hemson Consulting Ltd, May 31, 2022)

City of Barrie

Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study City of Barrie – Addendum Report – Final (Watson and Associates, May 19, 2020)

Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study City of Barrie – Draft (Watson and Associates, May 21, 2019)

Completion of Barrie Land Needs Analysis to 2051 Memo, (Dillion Consulting, May 5, 2021)

City of Orillia

City of Orillia - Municipal Comprehensive Review Land Needs Assessment to 2051 (Hemson Consulting Ltd., March 22, 2021)

Dufferin County

Dufferin County Municipal Comprehensive Review Land Needs Analysis Update (WSP, June 23, 2022) + Supplemental Projected Dwelling Growth and Intensification Target Capacity Gap slides

County of Wellington

Phase 2 M.C.R. Report: Urban Land Needs Assessment County of Wellington Final Report (Watson and Associates, August 29, 2022)

City of Guelph

Growth Management Strategy and Land Needs Assessment Report, Shaping Guelph: Growth Management Strategy (City of Guelph, December 2021)

Region of Waterloo

Land Needs Assessment – Addendum (Dillon Consulting | Watson & Associates Economists Ltd., June 21, 2022)

Brant County

Municipal Comprehensive Review County of Brant Draft Report (Watson and Associates, July 26, 2021)

- Intensification capacity determined by taking average between high and low range scenarios.

City of Brantford

Envisioning Brantford – Municipal Comprehensive Review Addendum Report (SGL / Dillon / BluePlan, October 2020)

Region of Niagara

Niagara Official Plan – 2051 Land Needs Assessment (Niagara Region, June 2022)

- Vacant DGA capacity calculated using PPU derived from population and unit projections to 2051.

Haldimand County

Haldimand County Official Plan Update: Phase 1 Revised Report - Growth Strategy (Matt Reniers and Associates, June 2021)

Appendix C: Intensification Targets Recommended in LNAs / by Councils

Municipality	Recommended Intensification Target
INNER RING	
City of Toronto*	100%
Region of Peel	55%
Region of York	50%
Region of Durham	50%
Region of Halton	45%
City of Hamilton**	79%
OUTER RING	
Northumberland County	17%
City of Peterborough	50%
Peterborough County	15%
City of Kawartha Lakes***	15%
Simcoe County	35%
City of Barrie	50%
City of Orillia	50%
Dufferin County	19%
Wellington County	15%
City of Guelph	46%
Region of Waterloo	61%
Brant County	20%
City of Brantford	45% to 2031, 50% 2031 to 2051
Region of Niagara	60%
Haldimand County	20%

*   No LNA required – all new housing units in Toronto are considered intensification units

**   Reflects no urban expansion as supported by Hamilton Council

***   No intensification target addressed in information on-line – a target of 15% assumed based on targets in similar municipalities