



City of Hamilton

Land Needs and Housing Assessment Report

November 18, 2024

Parcel

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Executive Summary

Parcel Economics Inc. ("Parcel") has been retained by Elfrida Community Builders Inc., which collectively own lands located in the Elfrida Community Area located in southeast Hamilton. The purpose of our retainer has been to, in part,

- Confirm the Community Area land needs identified in the *City of Hamilton Land Needs Assessment to 2051, Technical Working Paper*, (the "2051 LNA") prepared by Lorus and Associates ("Lorus");
- Prepare an independent Housing Assessment Report to identify if there is a need to plan for additional land to accommodate an appropriate range and mix of housing to 2051 based on the population forecasts prepared by the Ontario Ministry of Finance; and,
- Address the five key topic areas identified for a Housing Assessment Report in the *Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications*.

The following provides a summary of our findings:

Background and Policy Context

- In March 2021 the 2051 LNA was prepared by Lorus. The 2051 LNA identified that the City would need between 1,340 hectares and 3,440 hectares of Community Area lands by 2051 to accommodate the population and employment forecasts contained in Schedule 3 of *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (the "Growth Plan").
- On October 20, 2024, the *Provincial Planning Statement, 2024* ("PPS, 2024") came into effect. Policy 2.1.1 of the Proposed PPS, 2024 states that municipalities shall base population and employment growth forecasts on Ministry of Finance Ontario Population Projections. However, Policy 2.1.2 of the PPS, 2024 allows municipalities to continue to use population and employment forecasts previously issued by the Province for the purposes of land use planning.

Ministry of Finance Population Projections

- As it relates to forecasts previously issued by the Province, the population and employment growth forecasts in Schedule 3 of the Growth Plan were prepared in Summer 2020. At that time, the City of Hamilton was forecast to grow to 820,000 persons by 2051.
- Since that time significant changes have occurred with respect to Federal immigration policy that has resulted in increased immigration to Canada. The recent increase in immigration to Canada and appeal of Hamilton has resulted in the Ontario Ministry of Finance revising their population forecasts for the City. The most recent forecasts prepared by the Ontario Ministry of Finance in Fall 2024 forecast a population of nearly 903,300 persons in the City of Hamilton by 2051. Therefore, by 2051, the population in Hamilton could be 83,300 persons higher than anticipated in Schedule 3 of the Growth Plan.
- A review of population forecasts prepared by Hemson Consulting Ltd. (“Hemson”) for the Growth Plan demonstrates that the Hemson forecasts either closely match or are higher than the Ontario Ministry of Finance forecasts prepared around the same time. Therefore, it is reasonable to assume that if Hemson were to update their population forecasts today, they would be consistent with, or higher than the Ministry of Finance Fall 2024 forecasts.

Community Area Land Needs

- In estimating Community Area land needs to 2051, Parcel has translated the population growth forecasts from the Ontario Ministry of Finance into household growth using household formation rates (i.e. headship rates) from the 2021 Census of Canada.
- Applying the 2021 household formation rates to the population growth forecasts from the Ontario Ministry of Finance result in the need for an additional 136,900 households in the City of Hamilton between 2021 and 2051. This is 26,580 households more than forecast in the City of Hamilton 2051 LNA.
- We have relied on the intensification rates in the Ambitious Density Scenario to estimate Community Area land needs, as these are the most aggressive intensification rates considered as part of the 2051 LNA. Using the assumptions in the Ambitious Density Scenario, there is anticipated to be a shortfall of 23,830 single/semi-detached units and a shortfall of 14,780 row units in Hamilton by 2051.
- **The shortfall of 38,610 units will require an additional 1,780 gross hectares of Community Area lands in Hamilton by 2051.** The need for an additional 1,780 hectares of Community Area lands could, in part, be accommodated within the Elfrida Community Area.

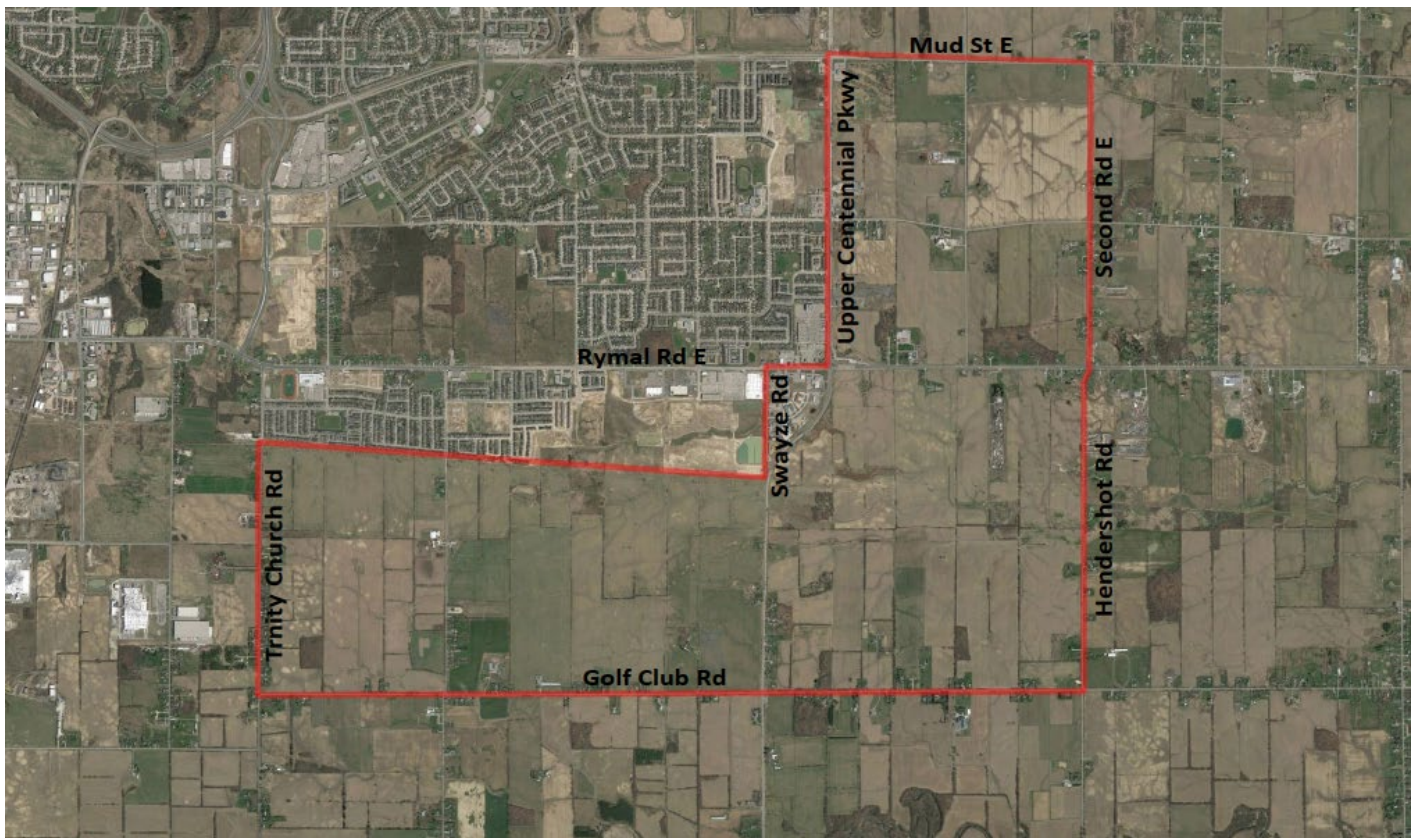
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Introduction

Parcel Economics Inc. ("Parcel") has been retained by Elfrida Community Builders Inc., which collectively own lands located in the Elfrida Community Area located in southeast Hamilton, as shown by the red boundary in Figure 1.1. The Elfrida area was previously identified as a preferred area to accommodate population and employment growth in Hamilton to 2031. To support this growth, an Elfrida Growth Area Study ("EGAS") was initiated in 2016 to fulfil the requirements for a settlement area boundary expansion to occur and inform the completion of a Secondary Plan for the Elfrida area.

The Elfrida Community Builders Inc. are submitting an Official Plan Amendment application for a Settlement Area Boundary Expansion to include the Elfrida Community Area (as shown below in Figure 1.1), which is the preferred location of a future transit oriented urban community to accommodate the City's future growth.

Figure 1.1:
Elfrida Community Area Location

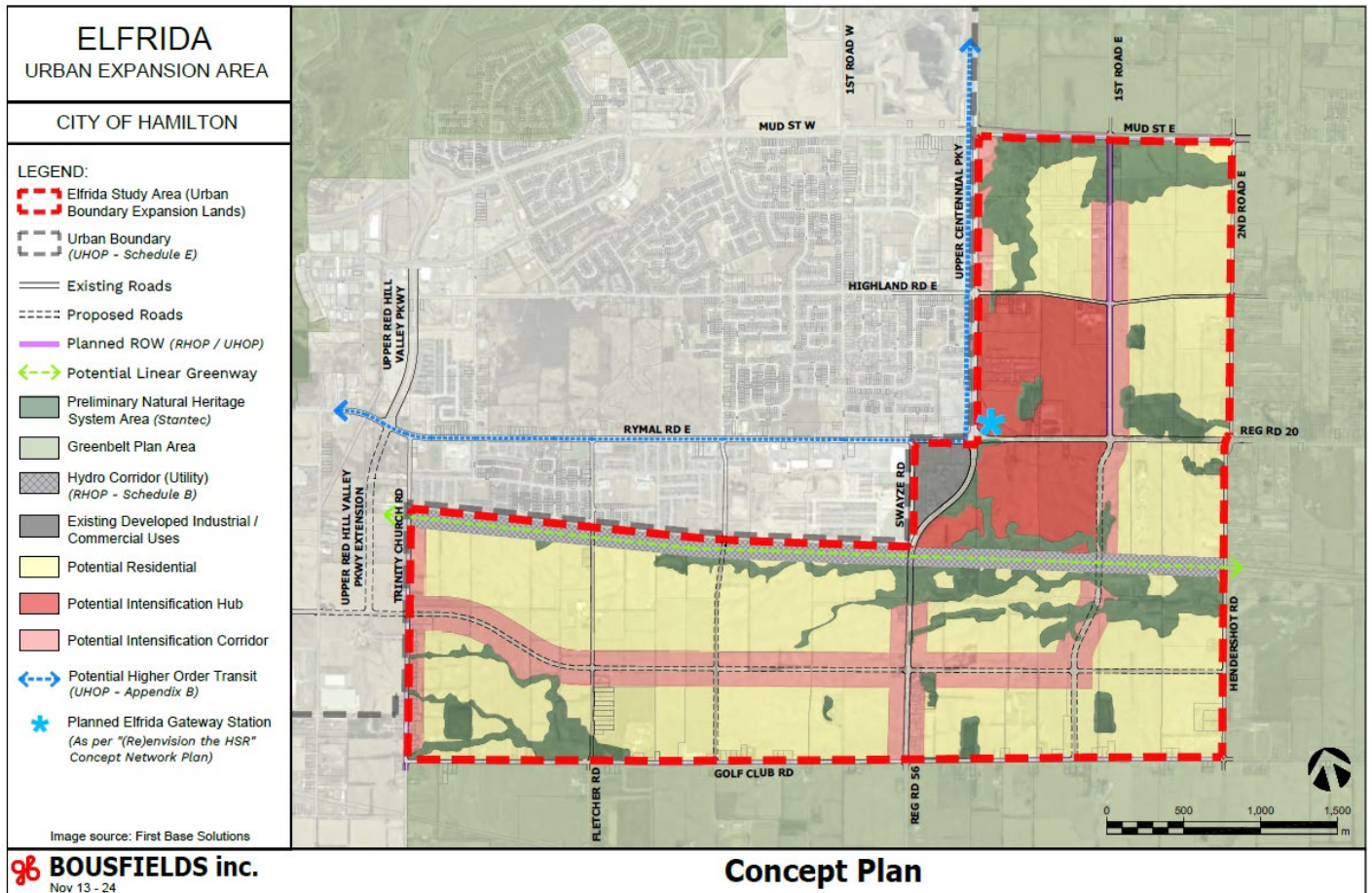


Source: Parcel based on Elfrida Growth Area Study - Interim Summary Report.

As part of the Official Plan Amendment application for a Settlement Area Boundary Expansion, a Draft Concept Plan has been prepared for the Elfrida Urban Expansion Area, as shown in Figure 1.2. This Draft Concept Plan could

ultimately accommodate approximately 114,900 persons and 14,460 jobs at build-out, for a density of 135 persons and jobs per hectare.

Figure 1.2
Elfrida Urban Expansion Area -Concept Plan



Source: Bousfields Inc.

1.1 Background

In March 2021 the *City of Hamilton Land Needs Assessment to 2051, Technical Working Paper*, (the "2051 LNA") was prepared by Lorus and Associates ("Lorus"). The 2051 LNA identified that the City would need between 1,340 hectares and 3,440 hectares of additional Community Area lands by 2051 to accommodate the population and

employment forecasts contained in Schedule 3 of *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (the “Growth Plan”). The need for an additional 1,340 hectares of Community Area lands was based on an Ambitious Density Scenario, whereas the need for an additional 3,440 hectares of Community Area lands was based on a Current Trends scenario.¹ City planning staff recommended endorsement of the Ambitious Density Scenario. The 2051 LNA also found that the City had a sufficient supply of existing Employment Area lands to accommodate growth to 2051. For the purposes of calculating land needs, the forecasts contained in Schedule 3 of the Growth Plan identified that by 2051, Hamilton will plan to accommodate 820,000 persons and 360,000 jobs.

On October 20, 2024, the *Provincial Planning Statement, 2024* (“PPS, 2024”) (described in more detail below) came into effect. Policy 2.1.1 of the PPS, 2024 directs planning authorities to base population and employment forecasts on the Ontario Population Projections published by the Ontario Ministry of Finance. The use of the Ontario Ministry of Finance population projections provides an opportunity to revisit the outcomes of the 2051 LNA, as it relates to Community Area land needs in the City of Hamilton to accommodate growth to 2051.

1.2 Policy Context

The following provides a review of relevant sections of the PPS, 2024, and the *City of Hamilton Official Plan* that informed this Housing Assessment Report.

Provincial Planning Statement, 2024

On October 20, 2024 the PPS, 2024 came into effect. The PPS, 2024 is issued under the authority of Section 3 of the *Planning Act* and is the primary provincial land use planning policy document, applying across Ontario. The PPS, 2024 also provide policy direction on matters applying only to Ontario’s largest and fastest growing municipalities, which are identified in Schedule 1 of the PPS, 2024 and include the City of Hamilton.

In determining the need to designate or plan for land to accommodate growth, Section 2.1 Planning for People and Homes, provides guidance on the population and employment forecasts that shall be used by planning authorities in planning for growth, where it states:

1. *As informed by provincial guidance, planning authorities shall base population and employment growth forecasts on Ontario Population Projections published by the Ministry of Finance and may modify, as appropriate.*

¹ The Community Area land needs under the Ambitious Density Scenario was subsequently revised to 1,310 hectares in a November 2021 Addendum report prepared by Lorus and Associates.

2. *Notwithstanding policy 2.1.1, municipalities may continue to forecast growth using population and employment forecasts previously issued by the Province for the purposes of land use planning.*
3. *At the time of creating a new official plan and each official plan update, sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of at least 20 years, but not more than 30 years, informed by provincial guidance. Planning for infrastructure, public service facilities, strategic growth areas and employment areas may extend beyond this time horizon.*

As it relates to intensification and density targets, Section 2.3 Settlement Area and Settlement Area Boundary Expansions states:

...

3. *Planning authorities shall support general intensification and redevelopment to support the achievement of complete communities, including by planning for a range and mix of housing options and prioritizing planning and investment in the necessary infrastructure and public service facilities.*
4. *Planning authorities shall establish and implement minimum targets for intensification and redevelopment within built-up areas, based on local conditions.*
5. *Planning authorities are encouraged to establish density targets for designated growth areas, based on local conditions. Large and fast-growing municipalities are encouraged to plan for a target of 50 residents and jobs per gross hectare in designated growth areas.*

...

Unlike the Growth Plan, 2019, which identified a minimum intensification target of 50% in Hamilton, the PPS, 2024 does not identify a minimum intensification target. As noted in Policy 2.3.5 of the PPS, 2024, large and fast-growing municipalities, including Hamilton, are encouraged to plan for a density target of 50 residents and jobs per hectare across designated growth areas, which are defined as:

Designated growth areas: *means lands within settlement areas designated for growth or lands added to settlement areas that have not yet been fully developed. Designated growth areas include*

lands which are designated and available for residential growth in accordance with policy 2.1.4.a), as well as lands required for employment and other uses.

City of Hamilton Official Plan

In June 2022, City of Hamilton Council passed Official Plan Amendment No. 167 ("OPA 167") to the Urban Hamilton Official Plan ("OPA 167"). Despite the findings in the 2051 LNA, which identified the need for between 1,340 hectares and 3,440 hectares of Community Area lands by 2051, the purpose of OPA 167 was to, in part, implement Council direction for the No Urban Boundary Expansion growth strategy.

Table A.1 of OPA 167 identifies a 2051 population of 820,000 persons in the City, consistent with the forecasts contained in Schedule 3 of the Growth Plan, as well as 332,800 households. As it relates to the Greenfield Density Target, OPA 167 states:

A.2.3.4.2 Greenfield areas shall be planned to achieve an overall minimum density of 60 people and jobs per hectare. The greenfield density target shall be measured over the entirety of Hamilton's greenfield area, excluding natural heritage features designated in this Plan, right-of-way for electrical transmission lines, energy transmission pipelines, roads classified as freeways, as defined and mapped as part of the Ontario Road Network, as well as railways, employment areas, and cemeteries.

A.2.3.4.3 Notwithstanding policy A.2.3.4.2, the lands within the greenfield area that are not subject to existing development approvals, including lands within the Fruitland-Winona Secondary Plan area, shall be planned to achieve a minimum density of 70 persons and jobs per hectare.

Regarding new housing to be accommodated within the built-up area, OPA 167 states:

A.2.3.4.4 The City shall plan to achieve a minimum of 80% of all residential development occurring annually within its built-up area. A total of 88,280 units are to be accommodated within the built-up area between 2021 and 2051. The built-up area for Hamilton is identified on Appendix G.

The intensification target and number of units to be accommodated within the built-up area is inconsistent with the results of the 2051 LNA, which considered intensification targets ranging from 40% in the Current Trends Scenario to an average of 60% in the Ambitious Density Scenario.

With respect to where intensification units will be accommodated within the built-up area, Policy B.2.4.1.3 goes on to state:

B.2.4.1.3 The residential intensification target of 80% or 88,280 housing units, specified in Policy A.2.3.3.4 shall generally be distributed through the built-up area as follows:

- d) The Downtown Urban Growth Centre shall be planned to accommodate approximately 30% of the intensification target.*
- e) The Urban Nodes and Urban Corridors identified in Section E.2.0 - Urban Structure, excluding the Downtown Urban Growth Centre, shall be planned to accommodate approximately 40% of the residential intensification target.*
- c) 30% of the residential intensification target is anticipated to occur within the Neighbourhoods as illustrated on Schedule E - Urban Structure. The City will review and update its Zoning By-law to facilitate the planned 27,000 housing units to be developed within the Neighbourhoods through intensification.*

Subsequent to the decision of Hamilton Council, in November 2022, MMAH released modifications and amendments to the City of Hamilton Urban and Rural Official Plans. As it relates to growth management, the MMAH modifications removed the minimum density target of 60 people and jobs per hectare across the entire DGA and also removed the requirement that 80% of all new residential development occur within the built-up area. MMAH also made modifications to settlement area boundary of Hamilton, by adding a new Urban Expansion Area - Neighbourhoods land use designation that applied to lands within the Elfrida Growth Area, among other lands within the City, as shown in Figure 1.2, below.

Figure 1.3

MMAH Modifications to Hamilton Settlement Area Boundary



Source: Parcel based on MMAH Decision with Respect to the City of Hamilton Official Plan Amendment No. 167.

MMAH also added policy Section 2.4 to the City of Hamilton Official Plan addressing Growth Management in Hamilton, where it states:

The urban boundary is expanded to accommodate growth to 2051 by adding Urban Expansion Area - Neighbourhoods and Urban Expansion Area - Employment Areas as shown on all Schedules to this Plan. Development of Urban Expansion Areas shall not proceed until detailed secondary planning has been completed and incorporated through future Amendment to this Plan. Secondary planning will be based on detailed assessment and consideration of applicable provincial policies. (OPA 167, MMAH Mod. 7)

In December 2023, *Bill 150, Planning Statutes Law Amendment Act, 2023* received royal assent, enacting the Official Plan Adjustments Act, 2023. In the context of Hamilton, the effect of this legislation included restoring the no urban boundary expansion growth strategy that was originally approved by City of Hamilton Council in June 2022. This removed the Elfrida Growth Area and other Urban Expansion Area - Neighbourhood lands from the Hamilton settlement area boundary.

City Council's June 2022 decision to implement a no urban boundary expansion growth strategy through OPA 167 and the Province's December 2023 decision to restore this strategy through Bill 150 were political decisions that are inconsistent with the findings and recommendations of the 2051 LNA and not based on any supporting or alternative technical study.

1.3 Purpose

Parcel has been retained by Elfrida Community Builders Inc. to prepare a Land Needs and Housing Assessment Report. The need for a Land Needs and Housing Assessment Report was identified by the City of Hamilton in the *Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications*,² where the Housing Assessment Report is intended to:

*clearly addresses the need for the expansion. The Housing Assessment Report should also address the impact on City-wide Intensification objectives/targets, densification of existing neighbourhoods and DGA supply, impacts on the UHOP Greenfield Density Target and overall phasing of development.*³

As part of Appendix A1 to Report PED24109, it is recommended that Housing Assessment Reports prepared to support settlement area boundary expansions address five key topic areas, including:

1. Need for Expansion

² Appendix "A" to Report PED24109.

³ Appendix "A1" to Report PED24109 (page 1).

2. Impact on City-wide Intensification Objectives
3. Densification of Existing Neighbourhoods and DGA Supply
4. The Greenfield Density Target
5. Phasing of Development

This Housing Assessment Report has been prepared, in part, to satisfy objectives of the *Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications* and address Policy 2.3.2.1.a) in the PPS, 2024 by identifying if there is a need to designate and plan for additional land to accommodate an appropriate range and mix of housing to 2051 based on the Ontario Population Projections prepared by the Ontario Ministry of Finance.

In identifying land needs based on the Ontario Ministry of Finance population projections, we have relied on the Ambitious Density Scenario assumptions in the 2051 LNA, prepared by Lorus and **recommended for endorsement by City planning staff**. We have relied on the assumptions in the Ambitious Density Scenario, as this resulted in the smallest land need among the four scenarios tested in the 2051 LNA and therefore represents the amount of Community Area lands, at a minimum, the City will need to accommodate growth to 2051.

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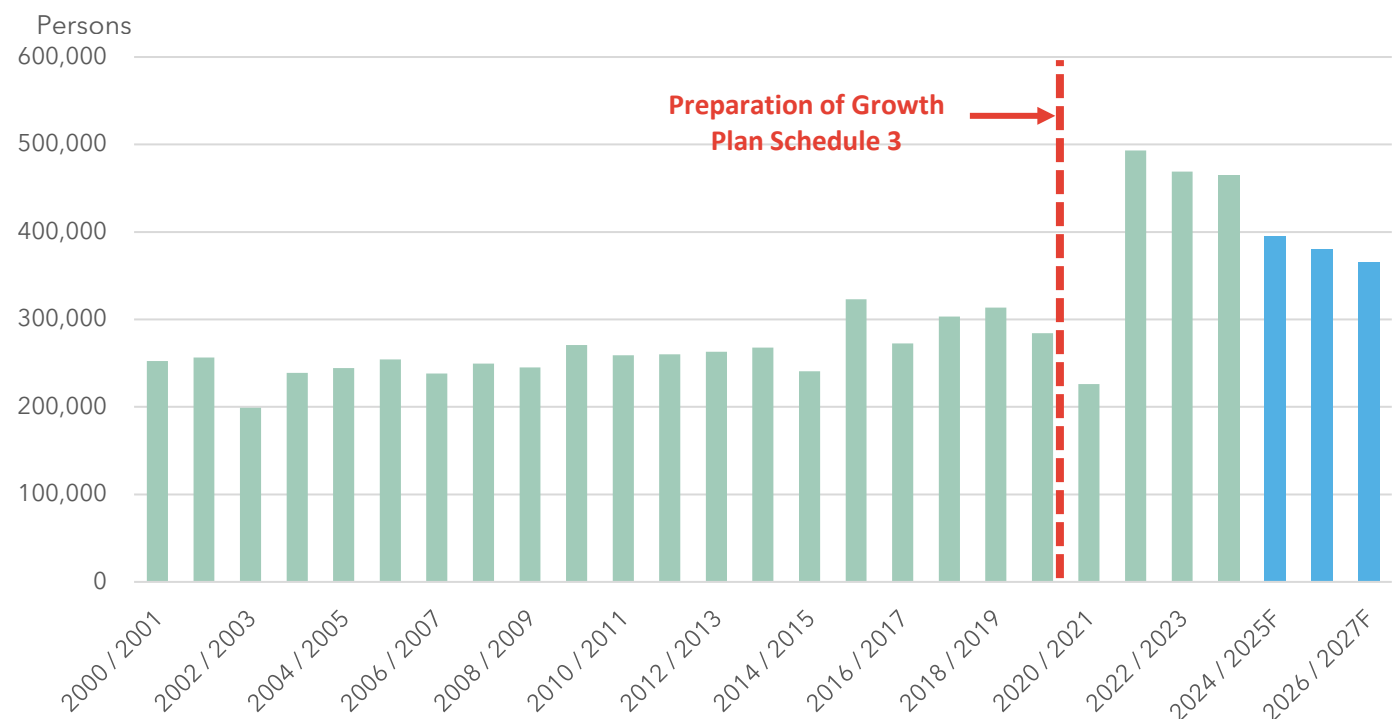
Population Projections

The 2051 LNA prepared by Lorus relied on population and employment forecasts contained in Schedule 3 of Growth Plan. These forecasts were prepared in the Summer of 2020 as part of the *Greater Golden Horseshoe: Growth Forecasts to 2051*, August 26, 2020, as prepared by Hemson Consulting Ltd. (“Hemson”).

As shown in Figure 2.1, since the population and employment growth forecasts for Hamilton were prepared as part of the *Greater Golden Horseshoe: Growth Forecasts to 2051*, **significant changes have occurred with respect to immigration policy**. The most significant change relates to Federal immigration targets, that have been increased substantially in recent years.

In the 20-years prior to the preparation of the population forecasts contained in Schedule 3 of the Growth Plan, Canada welcomed approximately 260,000 international immigrants per year. The level of international immigration increased to 475,000 new residents per year between 2021 and 2024. On October 24, 2024, the Federal Government revised international immigration targets for Canada. In the 2025 the Federal Government is targeting immigration of 395,000 persons, declining to 380,000 immigrants in 2026 and 365,000 immigrants in 2027. These revised targets are lower than previous targets released in 2023. However, they remain higher than levels of immigration achieved prior to the COVID-19 pandemic.

Figure 2.1
International Immigration to Canada (2000-2027)

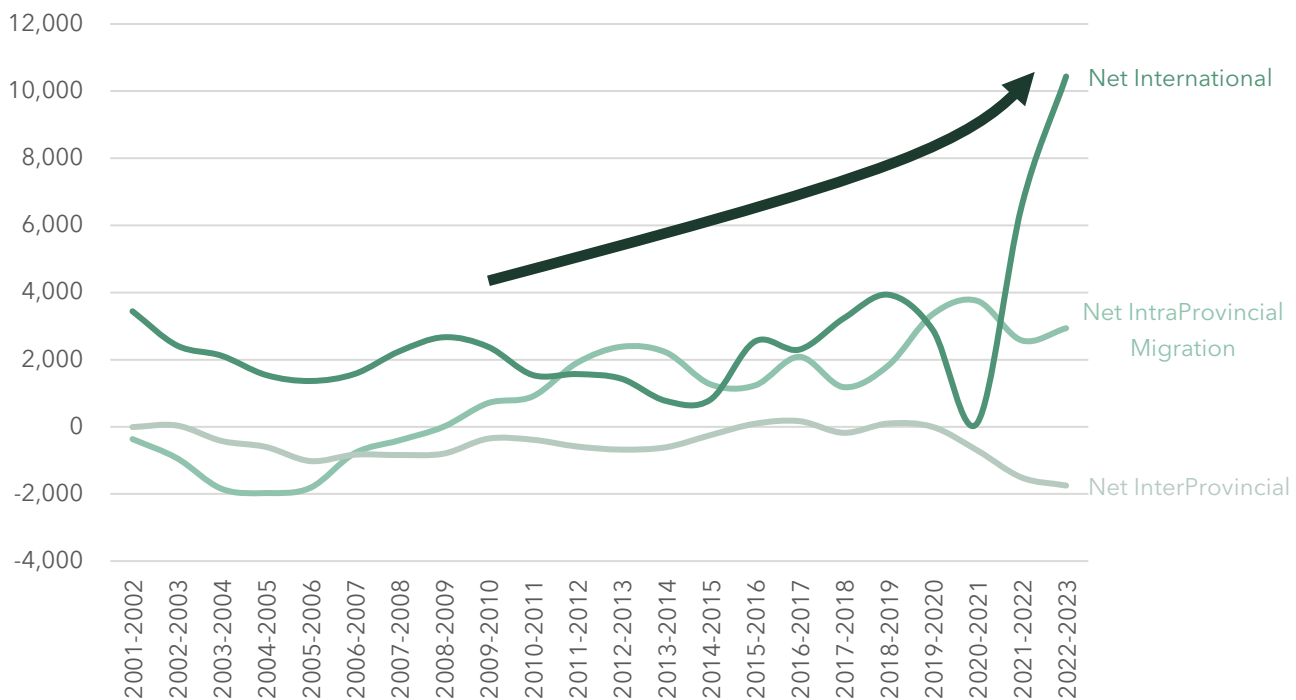


Source: Parcel based on Statistics Canada (green) and Federal immigration targets (blue).

Increased migration to Canada and the Greater Golden Horseshoe (“GGH”) is being felt in the City of Hamilton. Migration trends from Statistics Canada show that migration to Hamilton increased in recent years. As shown in Figure 2.2, net international migration to Hamilton accounted for the largest share of population growth and has been trending higher in recent years. Similarly, the increase in international immigration to Canada in 2022 and 2023 (as shown previously in Figure 2.1), also resulted in an increase in net international migration to Hamilton during the same period. At the same time, intra-provincial migration, which is people moving to Hamilton from elsewhere in Ontario, has also been trending higher in recent years. In fact, in every year since 2008, net intra-provincial migration has added to population growth in Hamilton.

Figure 2.2

City of Hamilton, Net Intra-Provincial and Net International Migration

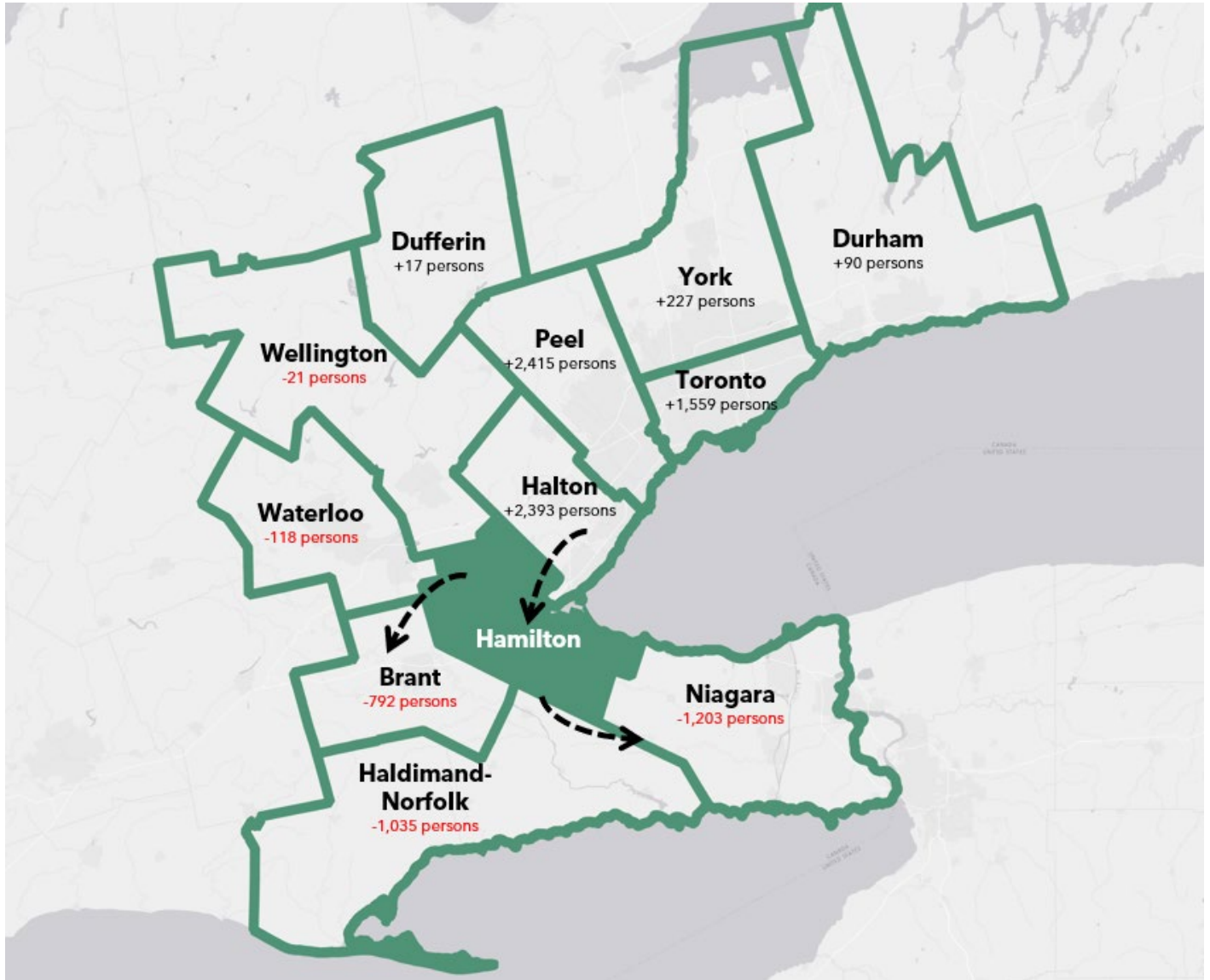


Source: Parcel based on Statistics Canada data.

In terms of net intra-provincial migration, there is a very clear trend of people moving to the City from the Greater Toronto Area (“GTA”), including Peel, Halton, Durham and Toronto, as shown in Figure 2.3. These new residents are likely attracted by the quality of life afforded by the City of Hamilton, as well as the opportunity to purchase ground-related housing. There is also a clear trend of people leaving Hamilton for Niagara Region, Haldimand-Norfolk and Brant County.

Figure 2.3

Net Migration Between Census Divisions and the City of Hamilton, 2016-2021



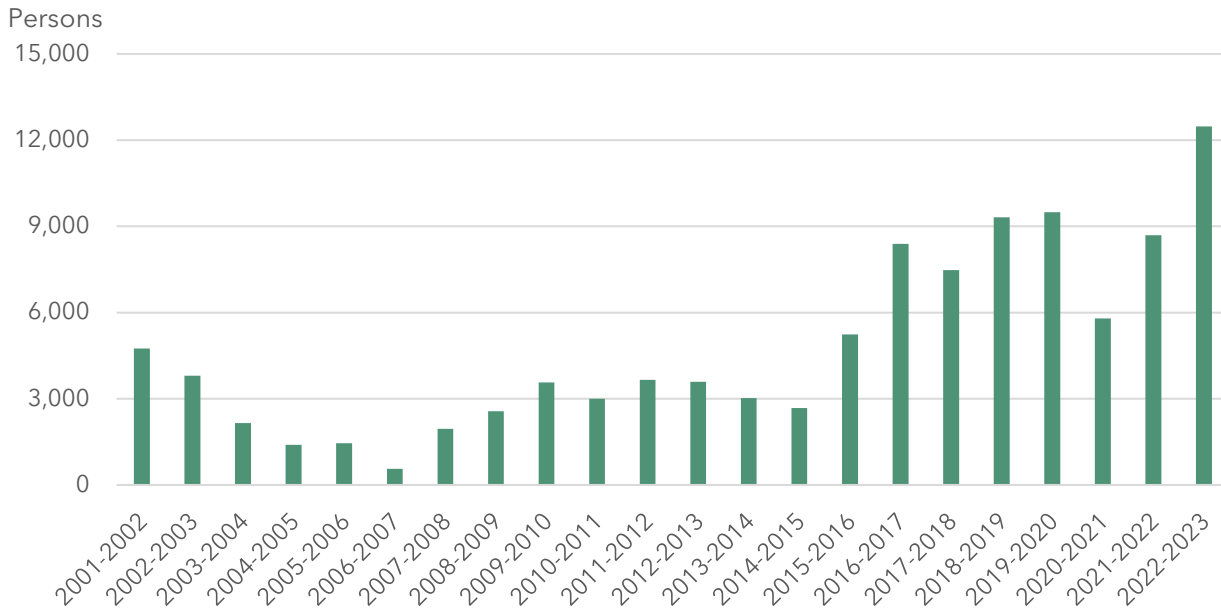
Source: Parcel based on Statistics Canada Tax Filer Migration Data.

Population Growth and Housing Construction

Recent migration trends have resulted in elevated population growth in Hamilton since 2015. As shown in Figure 2.4, between 2001 and 2015, the population in Hamilton grew by an average of approximately 2,700 persons per

year. Since 2015, average annual population growth is nearly 3-times higher (8,360 person per year) than rates experienced between 2001 and 2015.

Figure 2.4
 City of Hamilton Annual Population Growth

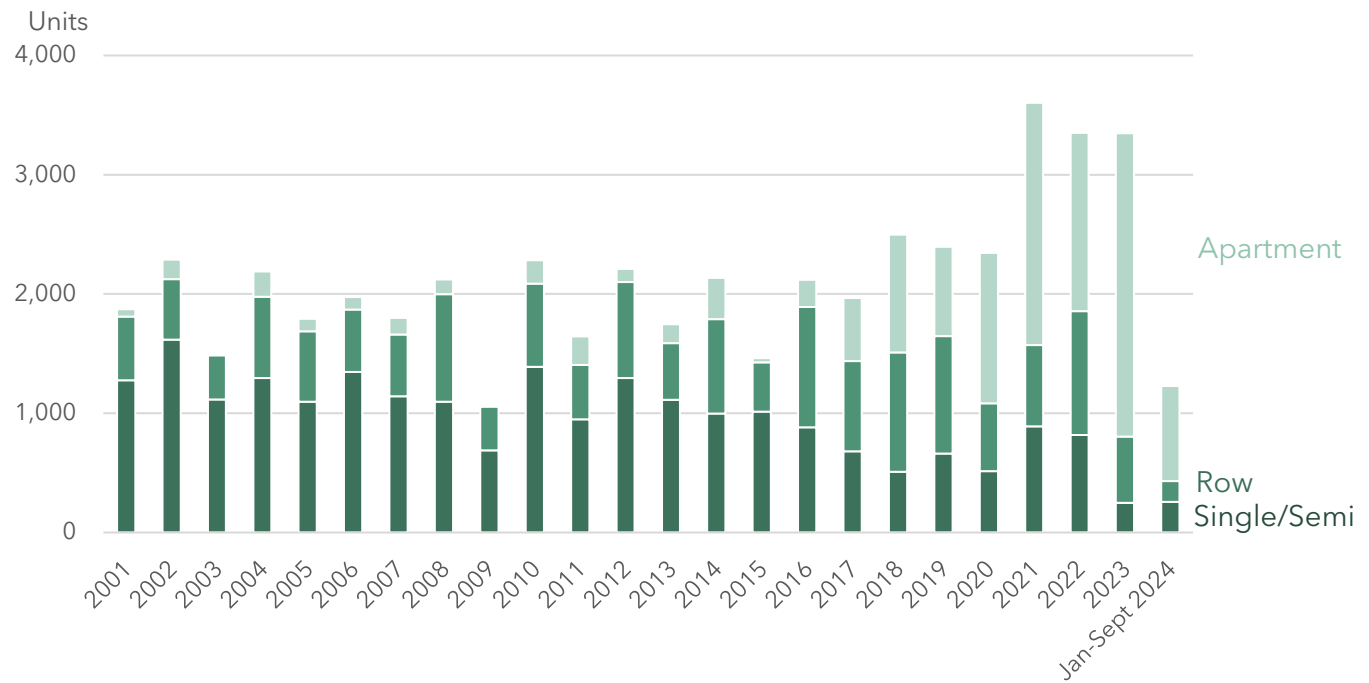


Source: Parcel based on Statistics Canada.

The recent increase in population growth has also impacted housing construction activity. As shown in Figure 2.5, housing starts have been elevated since 2018, averaging approximately 2,925 units per year between 2018 and 2023. This is substantially higher than the average of approximately 1,900 units per year experienced between 2001 and 2017.

Figure 2.5

City of Hamilton Housing Starts



Ministry of Finance Ontario Population Projection Methodology

The recent increase in migration to Canada and appeal of Hamilton has resulted in the Ontario Ministry of Finance revising their population projections for the City. The Ministry of Finance prepares Ontario Population Projections for the province and each of the 49 Census Divisions annually. These forecasts are based on the most up-to-date trends and historical data. The Ontario Ministry of Finance uses a cohort-component methodology that provides projections of births, deaths and five migration components (immigration, emigration, net change in non-permanent residents, interprovincial in-migration and out-migration and intraprovincial in- and out-migration).

The immigration levels used in preparing the Ontario Population Projections are based on federal government policy. The significant increase in federal immigration targets since 2020 has had an impact on population growth in the province and the City of Hamilton. In October 2020 the federal Minister of Immigration, Refugees and Citizenship Canada set a target of 401,000 new immigrants to the country in 2021, increasing to 421,000 new immigrants in 2023. More recently, the planned immigration target has been increased to 485,000 persons in 2024, increasing to 500,000 new immigrants in 2025 and 2026.

The population projections in Schedule 3 of the Growth Plan were prepared before the announced immigration targets in October 2020. Due to the significant increase in the targets set in recent years, the Ontario Ministry of Finance Fall 2024 projections represent a more accurate estimation of future population growth in the City of Hamilton.

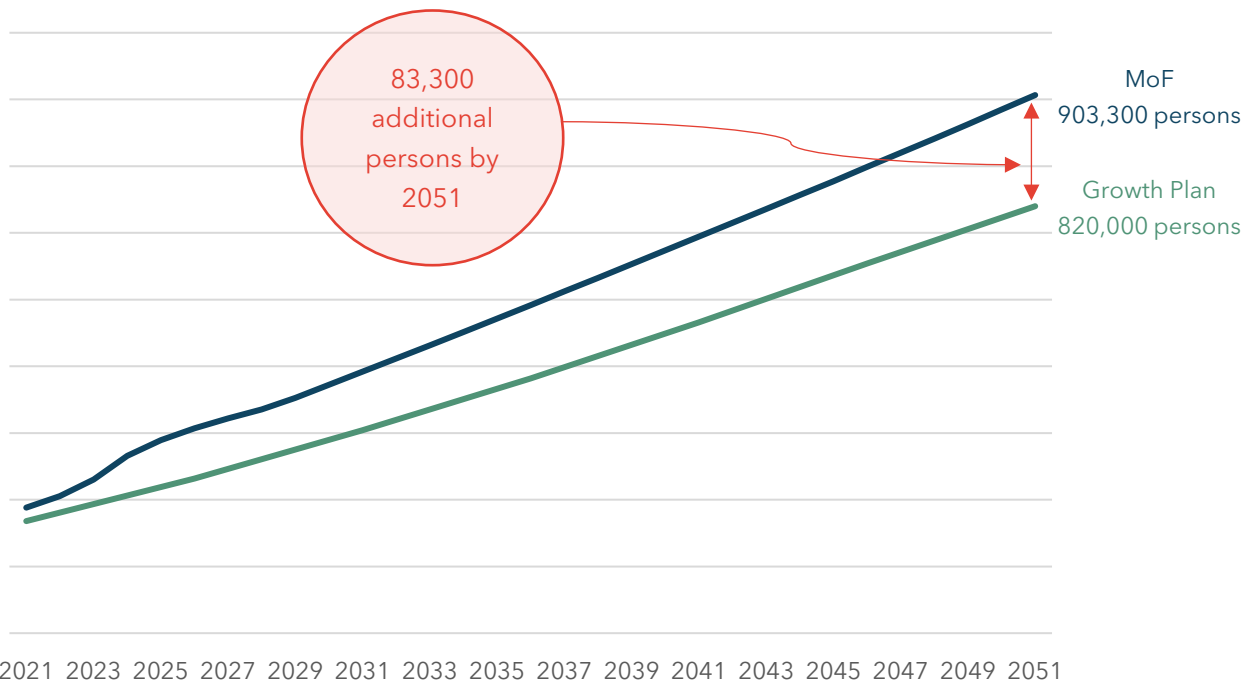
Ontario Ministry of Finance Projections in Hamilton

The most recent projections prepared in Fall 2024 anticipate a population of approximately 903,300 persons in the City of Hamilton by 2051.

To put this 2051 population in perspective, Schedule 3 of the Growth Plan identifies a 2051 population of 820,000 persons in Hamilton by 2051, as shown in Figure 2.6. Therefore, by 2051, the population in Hamilton could be 83,300 persons higher than anticipated in Schedule 3 of the Growth Plan.

Figure 2.6

City of Hamilton Forecast Population 2021-2051



Source: Parcel based on Ontario Ministry of Finance Fall 2024 Population Projections, A Place to Grow: Growth Plan for the Greater Golden Horseshoe and Greater Golden Horseshoe: Growth Forecasts to 2051, August 26, 2020, as prepared by Hemson Consulting Ltd.

In the staff report to Planning Committee on May 14, 2024, City staff raise concerns with the population projections prepared by the Ministry of Finance in Summer 2023, where they state:

The results also tend to vary from year to year, given that the method is based on a continuation of recent patterns of migration and population growth rather than a forecast of longer-term trends.

For these reasons, it is not clear that the Ministry of Finance projections would be any more or less helpful for land use planning than the current Growth Plan Schedule 3 figures. Replacing, Urban Hamilton Official Plan growth policies to 2051 with Ministry of Finance projections would necessitate the need to plan for additional population growth and/or reducing the planning horizon of the Official Plan. Based on current Ministry of Finance trends, staff expect this increase to be in the 100,000 range (approximately 920,000 by 2051). However, as noted above, the Ministry of Finance forecasts will change year to year based on, among other things, evolving migration and immigration trends.

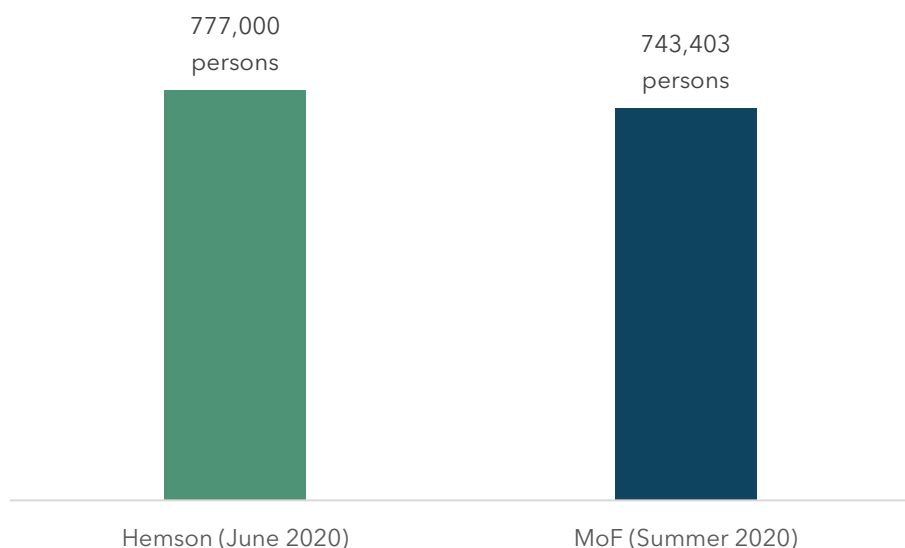
Staff support the continued use of Growth Plan Schedule 3 projections which appear to be better suited to reflect land use planning conditions at the municipal level.

As it relates to the Ontario Ministry of Finance forecasts for the City of Hamilton, we have compared these to forecasts prepared by Hemson as background to the Schedule 3 forecasts in the Growth Plan for 2005, 2012 and 2020.

As shown in Figure 2.7, the population projection prepared by the Ontario Ministry of Finance in Summer 2020 anticipate a population of 743,400 persons in Hamilton by 2046. This was lower than 2046 forecasts contained in the *Greater Golden Horseshoe: Growth Forecasts to 2051* (777,000 persons), which informed the Schedule 3 forecasts contained in the Growth Plan.

Figure 2.7

City of Hamilton 2046 Population Forecast



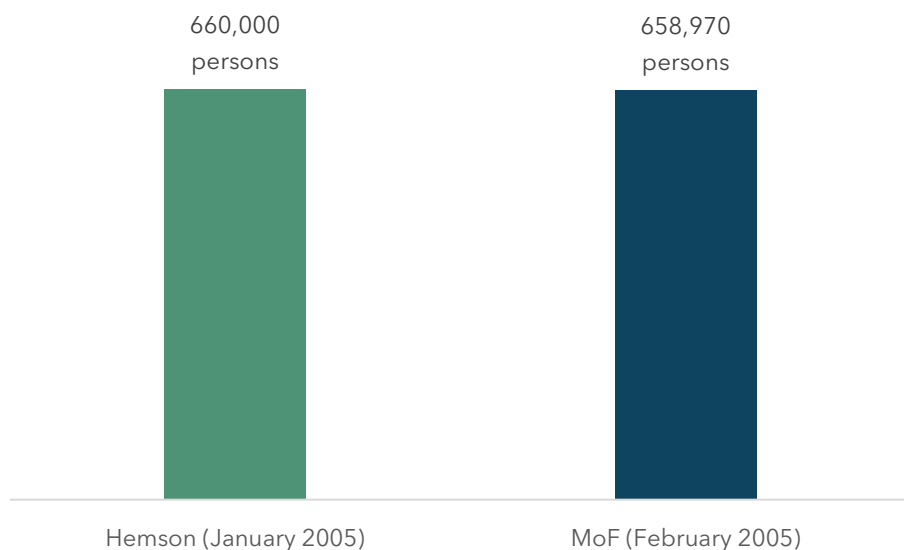
Source: Parcel based on *Greater Golden Horseshoe: Growth Forecasts to 2051*, June 16, 2020, prepared by Hemson Consulting Ltd. and Ontario Ministry of Finance *Summer 2020 Ontario Population Projections*.

Examining previous forecasts prepared by Hemson that informed forecasts in Schedule 3 of the Growth Plan follow a similar pattern. In January 2005, Hemson released *The Growth Outlook for the Greater Golden Horseshoe*, which forecast that by 2031, Hamilton would have a population of 660,000 persons under the reference scenario. In February 2005, the Ministry of Finance released their Winter Population Projections, which anticipated a population

of 658,970 persons in Hamilton by 2031. The difference between these forecasts is only 1,030 persons, as shown in Figure 2.8.

Figure 2.8

City of Hamilton 2031 Population Forecast



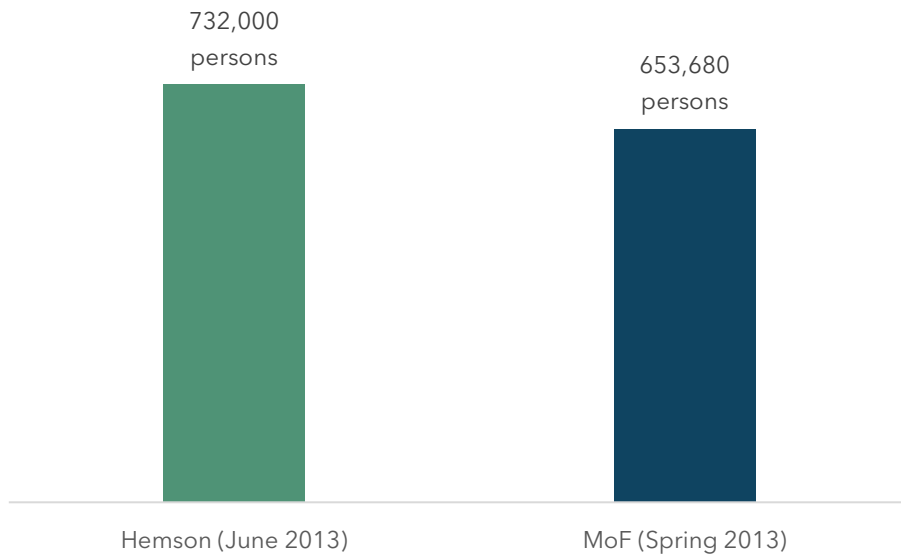
Source: Parcel based on *The Growth Outlook for the Greater Golden Horseshoe*, January 2005, prepared by Hemson Consulting Ltd. and Ontario Ministry of Finance *Winter 2005 Ontario Population Projections*, February 2005.

In June 2013, Hemson released *Greater Golden Horseshoe Growth Forecasts to 2041: Technical Report Addendum*, which forecast that by 2036, Hamilton would have a population of 732,000 persons under the reference scenario.⁴ In Spring 2013, the Ministry of Finance released their *Spring Ontario Population Projections*, which forecast a population of 653,680 persons in Hamilton by 2036. The difference between these forecasts was approximately 78,300 persons, as shown in Figure 2.9.

⁴ The *Greater Golden Horseshoe Growth Forecasts to 2041: Technical Report Addendum* also forecast population growth to 2041. However, to be consistent with the forecast horizon available from the Ontario Ministry of Finance, we have only commented on the comparability of forecasts to 2036.

Figure 2.9

City of Hamilton 2036 Population Forecast



Source: Parcel based on *Greater Golden Horseshoe Growth Forecasts to 2041: Technical Report Addendum*, June 2013, prepared by Hemson Consulting Ltd. and Ontario Ministry of Finance *Spring 2013 Ontario Population Projections*.

As the population forecasts for Hamilton prepared by Hemson in 2005, 2012 and 2020 either closely match or are higher than the Ontario Ministry of Finance projections prepared around the same time, it is reasonable to assume that if Hemson were to update their population forecasts today, they would be consistent with, or higher than the Ministry of Finance Fall 2024 forecasts, which anticipate 903,300 persons in Hamilton by 2051.

3.0

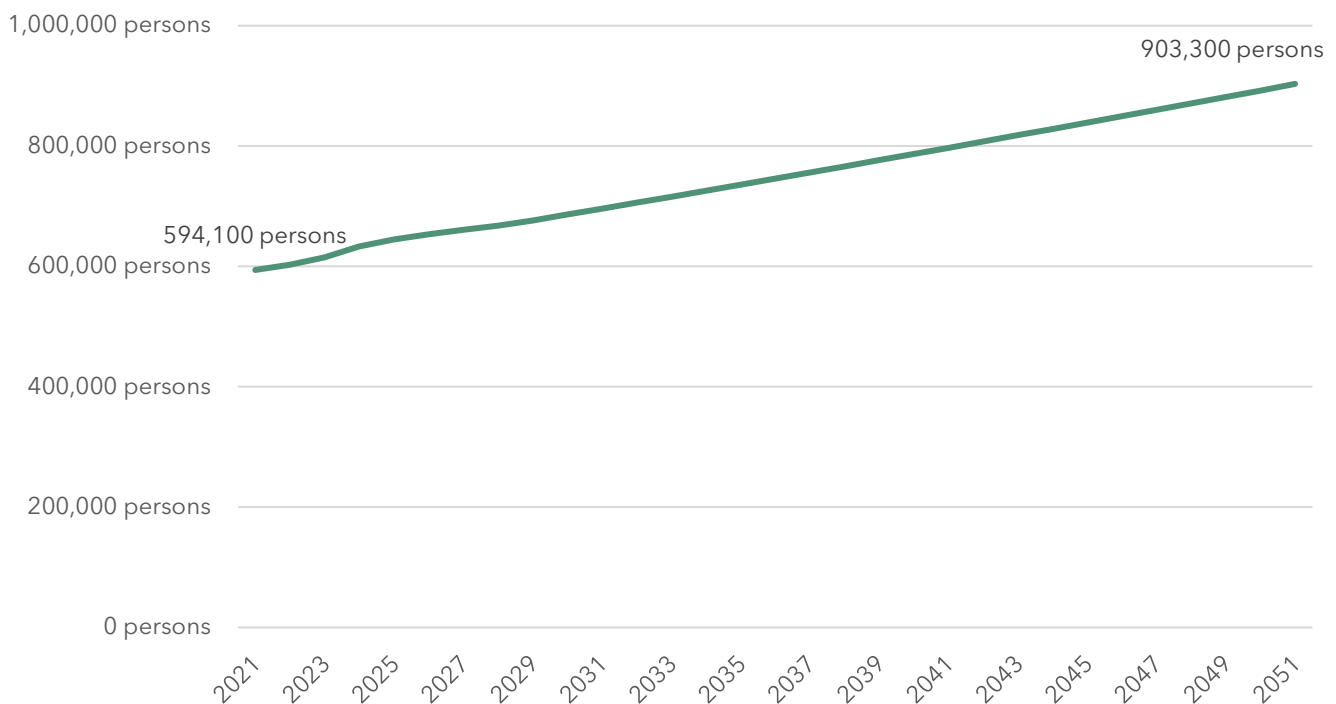
Community Area Land Needs Assessment

The following section summarizes the methodology and assumptions used in the preparation of this Housing Assessment Report, which is based largely on the Ambitious Density Scenario in the City of Hamilton 2051 LNA. Based on Section 2.1 of the PPS, 2024 we have prepared a Housing Assessment Report to 2051 (30-year horizon) based on population Fall 2024 Ontario Population Projections prepared by the Ontario Ministry of Finance.

3.1 Population Growth Forecasts

The Ontario Ministry of Finance Fall 2024 Ontario Population Projections have been relied upon in completing this Housing Assessment Report. As noted earlier, the Fall 2024 Ontario Population Projections forecast population growth in Hamilton to 2051. As shown, based on these forecasts, Hamilton is projected to reach a population of 903,300 persons by 2051.

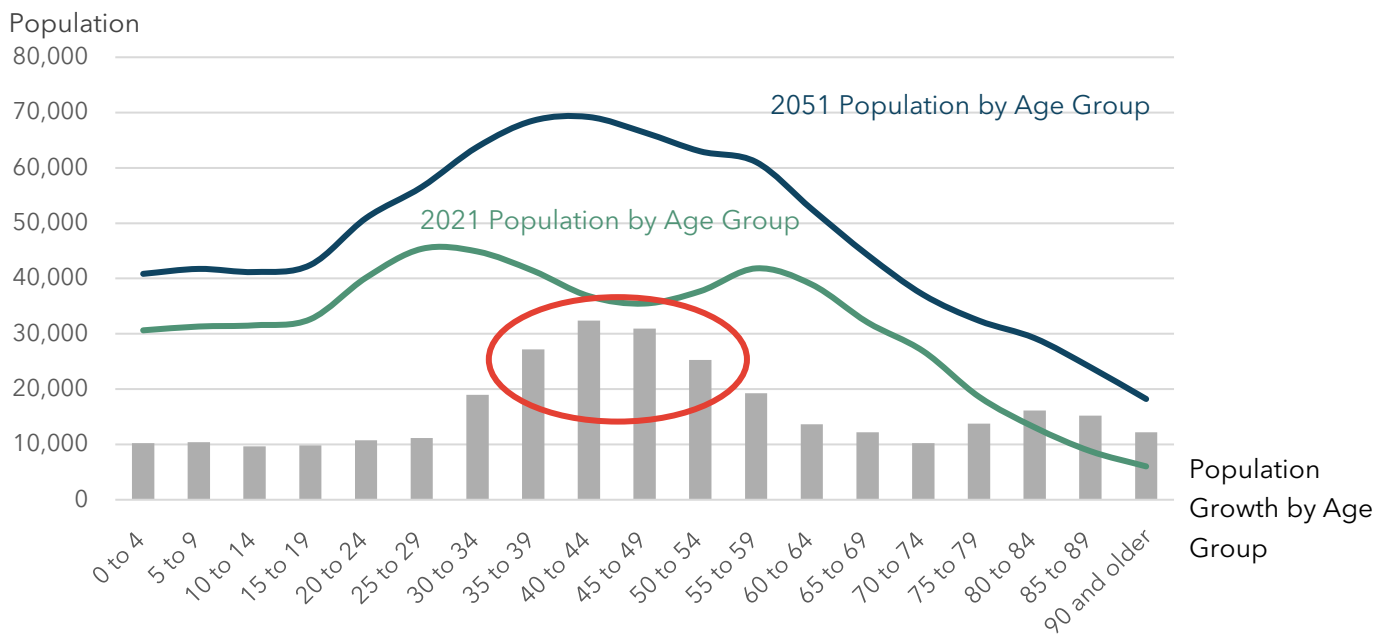
Figure 3.1
City of Hamilton Population Forecasts



Source: Parcel based on Ontario Ministry of Finance, Fall 2024 Ontario Population Projections.

As summarized in Figure 3.2, the population in each age cohort in Hamilton is anticipated to grow between 2021 and 2051. That being said, the 35 to 54 age group is anticipated to account for an outsized share of population growth. Population growth in this age cohort will influence market-based demand for housing, as this demographic group has a high propensity for certain types of housing, as will be discussed further in the next section of this report.

Figure 3.2
Hamilton Population by Age Group, 2021 and 2051



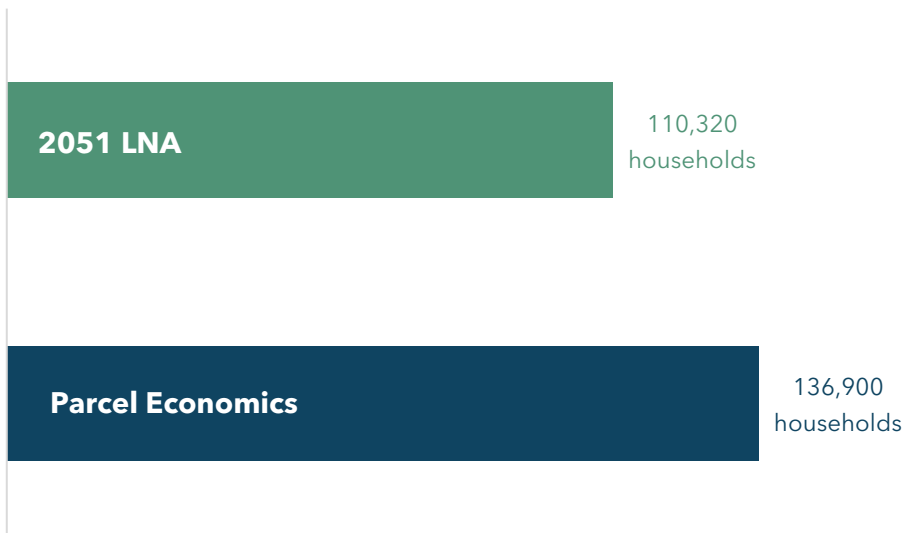
Source: Parcel based on Ontario Ministry of Finance Ontario Summer 2023 Population Projections.

3.2 Household Growth by Dwelling Type

Parcel has translated the population growth projections from the Ontario Ministry of Finance into household growth using household formation rates (i.e. headship rates) from the 2021 Census of Canada. This is an update from the 2051 LNA, which relied on household formation rates from the 2016 Census of Canada, which was the most current information available at the time the 2051 LNA was completed.

As shown in Figure 3.3, applying the 2021 headship rates to the population growth projections from the Ontario Ministry of Finance result in 136,900 additional households in the City of Hamilton between 2021 and 2051. This is **26,580 households more than forecast in the 2051 LNA**, or a 24% increase in the number of housing units required to accommodate growth.

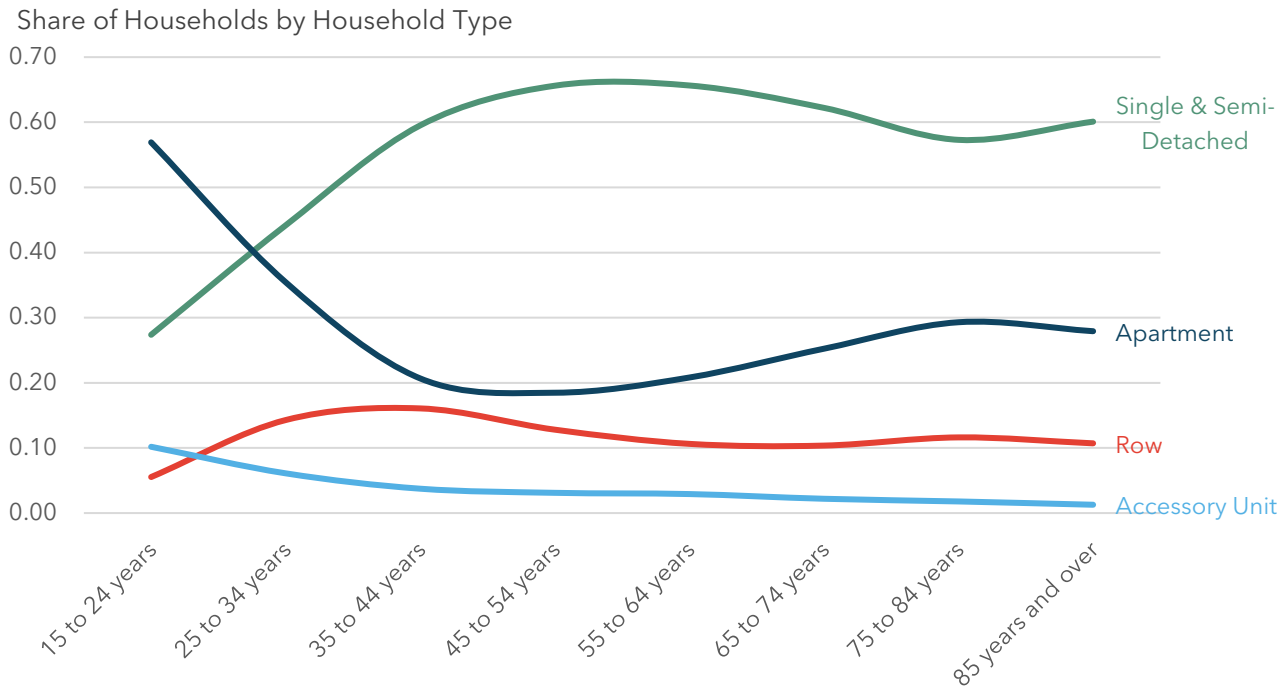
Figure 3.3
City of Hamilton Household Growth, 2021-2051



Source: Parcel and 2051 LNA.

In determining the allocation of household growth between single/semi-detached units, row units, accessory units and apartment units, we have relied on housing type propensities by age group from the 2021 Census to illustrate potential housing demand by unit type based on past trends. Figure 3.4 summarizes housing type propensities by age group for the City of Hamilton based on the 2021 Census of Canada. As shown, the 35 to 54 age group, which represents a large share of population growth in Hamilton between 2021 and 2051, has the highest propensity for single and semi-detached housing. Therefore, population growth in this age cohort will result in increased demand for single and semi-detached housing across the City.

Figure 3.4
Hamilton Housing Type Propensities by Age Group, 2021



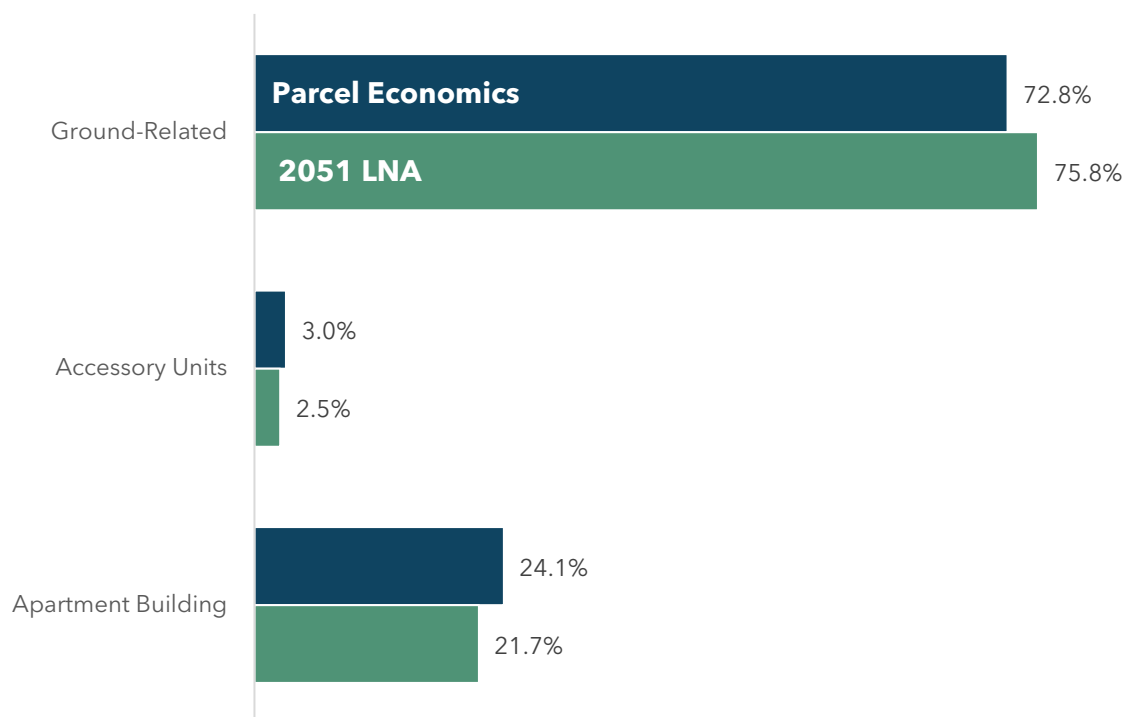
Source: Parcel based on 2021 Census of Canada.

Using this methodology, we have prepared a market-based housing needs forecast for the period between 2021 and 2051. This market-based forecast estimates that 60% of household growth will be in single/semi-detached units, 13% in row units, 3% in accessory units and 24% in apartment units. As shown in Figure 3.5, the allocation between ground-related housing, accessory units and apartment units is generally consistent with the market-based forecasts prepared as part of the 2051 LNA.

Household growth forecasts by dwelling type and by 10-year period is included in Figure A- 1 of Appendix A.

Figure 3.5

Market-Based Household Growth by Dwelling Type, 2021-2051



Source: Parcel and 2051 LNA.

3.3 Household Growth Allocation by Policy Area

Recognizing the Growth Plan mandated minimum intensification targets to 2051, the 2051 LNA adjusted the market-based housing forecast to reflect Growth Plan objectives. This results in the allocation of forecast housing growth to each of the policy areas (built-up area, DGA and Rural Area). The 2051 LNA also considered four intensification scenarios, including:

1. Growth Plan Minimum Scenario (50% Intensification)
2. Current Trends Scenario (40% Intensification)

- 3. Increased Targets Scenario (50%/55%/60% Intensification)
- 4. Ambitious Density Scenario (50%/60%/70% Intensification)

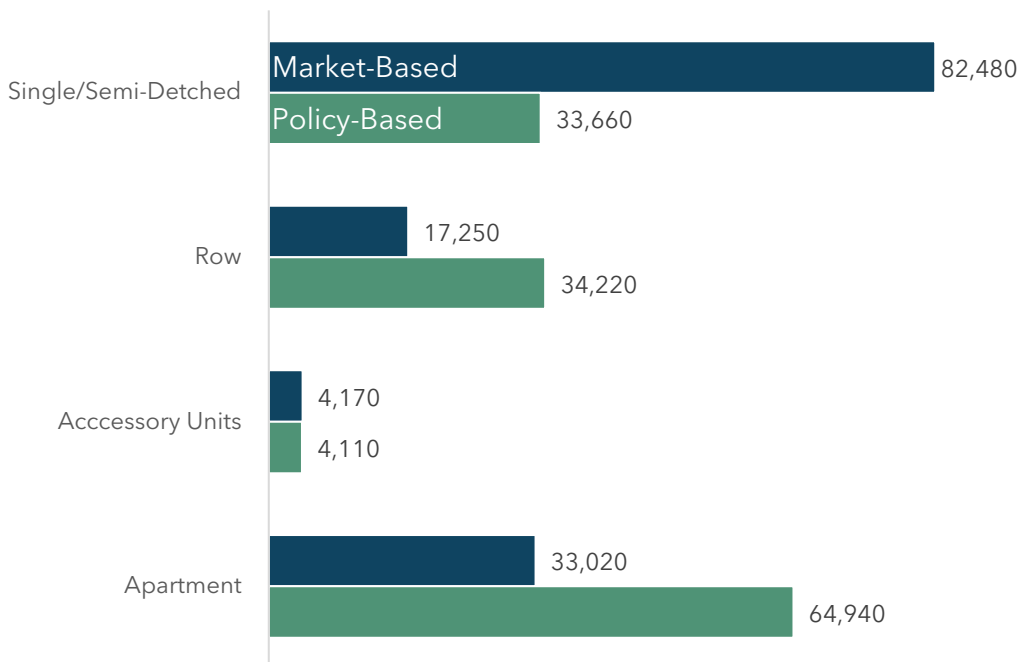
For the purposes of this Housing Assessment Report, we have relied on the intensification rates in the Ambitious Density Scenario, as these are the most aggressive intensification rates considered as part of the 2051 LNA.

Based on the Ambitious Density Scenario, the City of Hamilton would need to accommodate approximately 82,210 units within the built-up area of the municipality between 2021 and 2051. This represents 60% of household growth over this period. The remaining new households are allocated to the DGA and Rural Area of the City, with the DGA accommodating 54,570 new households and the Rural Area accommodating 150 new households.

Based on this intensification target and housing allocations by dwelling type contained in the 2051 LNA, to achieve the Ambitious Density Scenario, there would need to be a significant shift in household growth away from single and semi-detached units towards row and apartment units, as shown in Figure 3.6.

Figure 3.6

City of Hamilton Market-Based and Policy-Based Household Growth, 2021-2051



Source: Parcel.

Figure 3.7 summarizes policy-based household growth forecasts by 10-year period in the City of Hamilton. These policy-based forecasts take into account the increase in the intensification targets between 2021 and 2051, as well as the distribution of units, by unit type, in the Built-up Area and Designated Greenfield Areas.

Figure 3.7

Policy-Based Household Growth by 10-Year Period, City of Hamilton

	Single/Semi-		Accessory		Total
	Detached	Row	Units	Apartment	
2021-2031	13,295	12,395	1,240	18,140	45,070
2031-2041	11,375	11,560	1,385	21,915	46,235
2041-2051	8,990	10,265	1,485	24,890	45,630
2021-2051	33,660	34,220	4,110	64,945	136,935

Source: Parcel.

3.4 Housing Supply

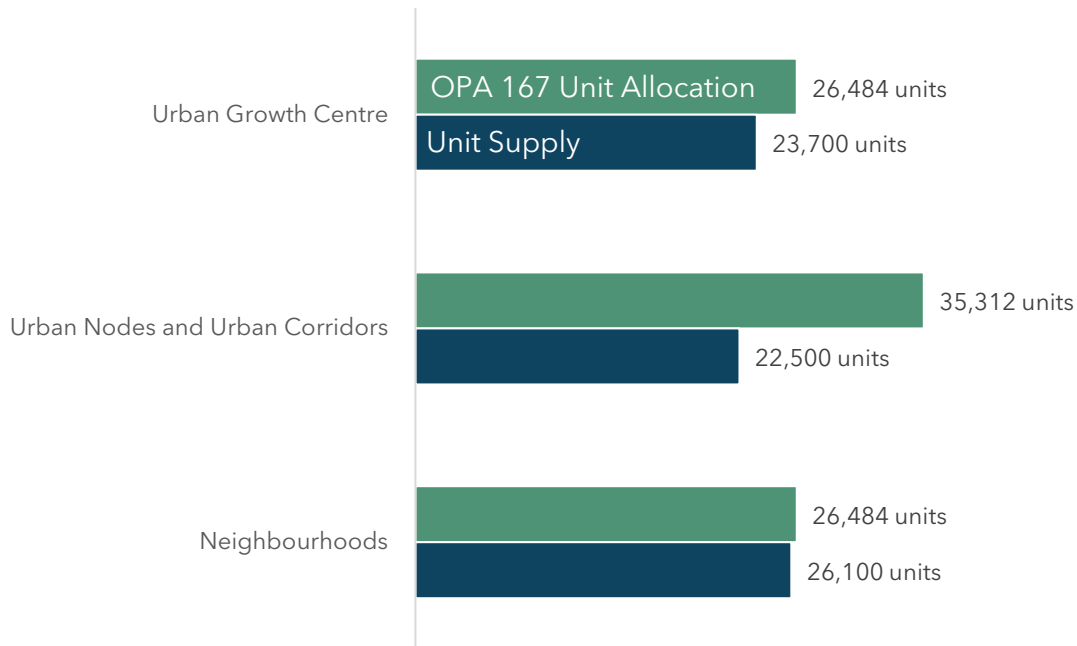
We have compared the household growth allocation by policy area in the Ambitious Density Scenario to the supply of lands within these policy areas that are available to accommodate growth.

Intensification Supply

In March 2021, the City of Hamilton prepared *Residential Intensification Supply Update*. The purpose of this report was to identify the intensification supply potential across the City to 2051. Table 2 in the *Residential Intensification Supply Update* identified the opportunity to accommodate 72,300 new units through intensification. It is notable that the allocation of units to the various policy areas (Urban Growth Centre, Urban Nodes and Corridors and Neighbourhoods) in Policy B.2.4.1.3 of OPA 167 exceeds the identified supply in the *Residential Intensification Supply Update*, as shown in Figure 3.7.

Figure 3.8

Built-Up Area Unit Allocation and Supply

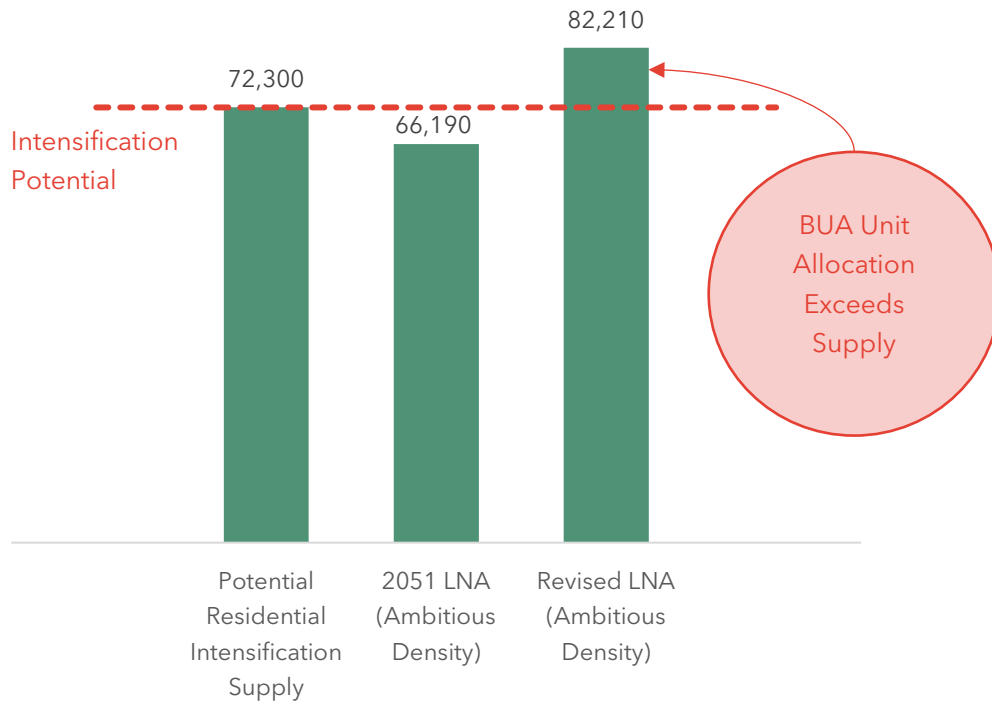


Source: Parcel based on OPA 167 and Residential Intensification Supply Update.

Based on the Ambitious Density scenario in the 2051 LNA, the City was forecast to accommodate 66,190 units within the built-up area. Therefore, based on this scenario, the intensification potential in the City was sufficient to accommodate the forecasted growth planned to occur within the built boundary. However, using the Ministry of Finance population projections and the resulting household growth forecasts under the Ambitious Density scenario, the City of Hamilton would need to accommodate approximately 82,210 units within the built boundary between 2021 and 2051. This exceeds the identified intensification supply. Therefore, while we have used the assumptions in the Ambitious Density scenario, it is reasonable to assume that this level of intensification may not be achieved due to a shortfall in supply in the built-up area.

Figure 3.9

Built-Up Area Unit Supply and Growth Allocation



Source: Parcel based on Residential Intensification Supply Update, March 2021 and City of Hamilton Land Needs Assessment to 2051, Technical Working Paper – Summary of Results, March 2021.

Designated Greenfield Area Supply

In addition to the *Residential Intensification Supply Update*, the City of Hamilton also prepares updates to the supply of units that can be accommodated within the DGA. The 2051 LNA utilized the results that were available for year-end 2019, which identified a DGA unit supply of 22,670 units. To align the unit supply with the 2021-2051 forecast period, the 2051 LNA subtracted units completed between the end of 2019 and mid-2021. This resulted in an adjusted DGA unit supply of 20,780 units that are available to accommodate growth to 2051. In the next section of this report, we assess the adequacy of this DGA unit supply in accommodating growth.

Updated DGA Supply Information

In October 2023, the City released Vacant Residential Land Area - 2023 Update (City Wide) (“VRLA 2023 Update”). The VRLA 2023 Update summarized the unit supply for both intensification and in the DGA. As the VRLA 2023 Update does not separate the unit supply between 1) Intensification and 2) DGA, we have continued to rely on the year end 2019 supply contained in the 2051 LNA. That being said, a comparison of the supply of single-detached, semi-detached and row units between these two period (2019 and 2023) shows that the supply of single and semi-detached units declined by nearly 1,350 units, while the supply of row units increased by nearly 600 units, for an overall net reduction of approximately 750 ground-related units.

3.5 Community Area Land Needs

In determining Community Area land needs in Hamilton to 2051, we have compared the supply of units within the existing DGA to the number of units allocated to the DGA over the 2021 to 2051 period using the assumptions in the Ambitious Density Scenario. Figure 3.9 summarizes the comparison of the DGA household growth allocation by unit type to the available supply. As shown, there is anticipated to be a shortfall of 23,830 single/semi-detached units and a shortfall of 14,780 row units.

Figure 3.10

Ambitious Density Scenario Comparison of DGA Unit Supply to Forecast Demand

	Single/Semi-Detached	Row	Apartment	Total
<i>Ambitious Density (50%/60%/70%)</i>				
Unit Growth 2021-2051 DGA	29,400	21,890	3,280	54,570
DGA Unit Supply Potential	5,570	7,110	8,090	20,770
Unit (Shortfall) or Surplus	(23,830)	(14,780)	n.a.	

Source: Parcel.

Using unit per hectare density assumptions for the Ambitious Density Scenario in the 2051 LNA, as well as the net to gross factor to account for community uses, the shortfall of 38,610 units will require an additional

1,780 gross hectares of Community Area lands, beyond what is available in the current settlement area

boundary. The need for an additional 1,780 hectares of Community Area lands could, in part, be accommodated within the Elfrida Community Area.

As noted previously, we consider this Community Area land needs to be conservative, as the intensification target utilized in the Ambitious Density Scenario results in there being an insufficient supply of housing within the built-up area of Hamilton. If the intensification target were lowered, it would result in the need for even more Community Area lands. To put this Community Area land needs in perspective, the 2051 LNA identified the requirement for an expansion of 1,340 gross hectares based on the lower population growth forecasts contained in Schedule 3 of the Growth Plan.

Figure 3.11

DGA Land Needs to 2051

	Single/Semi-Detached	Rows	Apartments	Total
Unit (Shortfall) or Surplus	(23,830)	(14,780)	n.a.	(38,610)
Density Factors (units per hectare)	35	70	n.a.	43
Land Need for Residential Space (net ha)	680	210	n.a.	890
Factor to Account for Community Use ¹				50%
Community Area Land Needs (gross ha)				1,780
Density (Persons and Jobs per Ha)				82

Note: Density based on applying person per unit (“PPU”) factors for new units in the *City of Hamilton 2024 Development Charges Background Study*. This includes PPUs of 3.533 for single/semi-detached, 2.637 for row units and 1.721 for apartment units. Also adjusts for non-household population (at a rate of 1.48%) and undercount (at a rate of 3.07%). Population-related employment is estimated at a rate of 1 job per 8 new residents.

Source: Parcel.

Based on person per unit estimates and community area job ratios, the expanded Community Area identified in this Housing Assessment Report could accommodate a density of 82 persons and jobs per hectare (Figure 3.10). This density exceeds the minimum density of 70 persons and jobs per hectare identified in Policy A.2.3.4.3 of OPA167 for DGA lands that are not subject to existing development approvals, it also exceeds the designated growth areas density of 50 residents and jobs per gross hectare identified for large and fast-growing municipalities in Section 2.3.1.5 of the PPS, 2024.

We have calculated the resulting density across the entire Community Area of the DGA, including the existing DGA, as well as the area encompassing the additional land needs. The purpose of this analysis has been to determine if

the resulting density in the DGA conforms to Policy A.2.3.4.2 of OPA 167, which identifies a minimum density of 60 persons and jobs per hectare across the entire DGA.

As shown, based on information contained in the 2051 LNA, the existing DGA, including the portion that is developed, as well as undeveloped, could achieve a density of approximately 60 persons and jobs per hectare. As shown in Figure 3.10 the new DGA is anticipated to accommodate a density of 82 persons and jobs per hectare. Based on this information, across the entire Community Area of the DGA, the City of Hamilton would achieve a density of 70 persons and jobs per hectare. This exceeds the minimum density of 60 persons and jobs per hectare identified in Policy A.2.3.4.2 of OPA 167.

Figure 3.12:

DGA Density Analysis

	Population	Jobs	Persons + Jobs	Land Area (ha)	Density (PJH)
Existing DGA ¹	114,710	13,270	127,980	2,141 ha	60 p+j/ha
New DGA	130,446	16,306	146,752	1,780 ha	82 p+j/ha
Total DGA	245,156	29,576	274,732	3,921 ha	70 p+j/ha

¹ Based on analysis in Table 19 of 2051 LNA.

Source: Parcel based on 2051 LNA.

Figure 3.13 below provides a summary of the various DGA densities, relative to the density calculated in Figure 3.11.

Figure 3.13

Summary of DGA Densities

	Density
Density in Designated Growth Areas (PPS, 2024 Section 2.3.1.5)	50 p+j/ha
Overall Density in Hamilton Greenfield Areas (Policy A.2.3.4.2 of OPA167)	60 p+j/ha
Density in Greenfield Areas Not Subject to Development Approvals (Policy A.2.3.4.3 of OPA167)	70 p+j/ha
Ambitious Density Scenario in Lorious 2051 LNA	77 p+j/ha
Parcel Housing Assessment Report	82 p+j/ha

4.0

Response to Topic Areas

The following section reiterates the five key topic areas identified for the Housing Assessment Report in Appendix "A1" to Report PED24109 and how these key topics are addressed by Parcel in this Housing Assessment Report.

1. Need for the Expansion

Recognizing that the under the Proposed PPS (2024) municipalities will be required to consider the need for settlement area expansion, proponents should be required to demonstrate that any proposed expansion is necessary to accommodate the range and mix of land uses, including housing by type based on the City's approved UHOP housing targets. The justification would not necessarily be a full 'market-based' assessment of land need to the plan horizon at 2051, since the no UBE scenario by definition requires that a significant shift away from historic patterns to accommodate be achieved to accommodate all growth within the existing urban boundary. Rather, the proponent should be required to support the need to provide additional supply for 'ground-related' housing, at the time of application, and show that this type of supply cannot reasonably be provided within the existing urban area. This position would need to be less in the form of an overall "market-based" demand argument, but rather a supply-based assessment of the likelihood of the City accommodating its ground-related housing needs within the existing urban area, through the delivery of detached accessory units, like laneway houses and garden suites, lot splits, multiplex conversions and other gentle densification options. Work undertaken as part of the March 2021 LNA concluded that delivering the necessary number of larger, family-sized apartments and ground-related units within existing areas would be a challenge.

Parcel Response

This Housing Assessment Report clearly demonstrates the need for a settlement area expansion to accommodate housing growth to 2051. The housing forecasts, by dwelling type, prepared as part of this Housing Assessment Report are not a full 'market-based' assessment, but rather rely on the unit mix assumptions utilized in the Ambitious Density Scenario of the 2051 LNA prepared by Lorus.

For comparison purposes, this Housing Assessment Report also prepares 'market-based' housing forecasts by dwelling type, which demonstrates that based on historical housing propensities, ground-related housing (i.e. single-detached, semi-detached and row units) could account for as much as 73% of housing demand between 2021 and 2051. This clearly demonstrates the need to provide additional supply of ground-related housing units. Despite this need, the Ambitious Density Scenario considered as part of this Housing Assessment Report utilizes a policy-based shift, where only 50% of new units in the City between 2021 and 2051 will be ground-related units.

Furthermore, as shown previously in Figure 3.10, based on the assumptions in the Ambitious Density Scenario, there is anticipated to be demand for as many as 51,290 ground-related units in the DGA between 2021 and 2051. By comparison, in 2021 there was an estimated supply of 12,680 ground-related units in the existing DGA. This

results in a shortfall of 38,610 ground-related units. It is not reasonable to assume that shortfall of ground-related units could be accommodated within the existing urban area in the form of detached accessory units, such as laneway houses and garden suites, lot splits, multiplex conversions and other gentle densification options. A memorandum prepared on April 15, 2021 titled *City of Hamilton Land Needs Assessment (LNA) and Secondary Dwelling Units (SDU) to 2051* (the “SDU Memorandum”) states that:

From a land needs perspective, therefore, detached SDUs within the Built-up Area is generally not a direct substitute for ground-related, ownership housing in greenfield areas. And in any event - to put it somewhat more plainly - there are just not that many of them. Even if the City of Hamilton were to achieve a level of building activity comparable to the City of Vancouver, these units would still only account for a very small part of the total housing demand to 2051. These types of units also tend to be expensive to build and maintain, which compounds the supply challenge.

In a July 21, 2021 memorandum titled *City of Hamilton Land Needs Assessment (LNA) Technical Update* (the “LNA Technical Update”) provides a forecast of potential detached SDU growth in Hamilton to 2051. As it relates to a forecast of SDU growth in Hamilton, the LNA Technical Update states:

For detached SDUs in particular, the overall growth outlook is expected to be limited: approximately 80 units per year to 2051.

To put this in perspective, to accommodate the shortfall of 38,610 ground-related units within the existing urban area, the City would need to accommodate approximately 1,290 units per year in the form of detached SDUs, or 16-time higher than the forecast in the LNA Technical Update and 3-times higher than rates achieved in the City of Vancouver.⁵

The LNA Technical Update goes on to state:

Based on a desktop review, it is estimated that Vancouver has more than 10 times the area of neighbourhoods with laneways compared to the City of Hamilton. Accordingly, a rate of 420 units per year might translate into roughly 30 units per year, which is likely optimistic given that not all laneways in Hamilton are public meaning that primary access to the unit may not be maintained as a public right of way throughout the City.

⁵ Table 1 in the LNA Technical Update summarizes laneway housing building permit activity in Vancouver between 2010 and 2021. During this period, the City averaged 421 building permits for laneway units per year.

2. Impact on City-wide Intensification Objectives

Proponents should be required to show that the proposed expansion would not adversely affect City-wide intensification objectives including demand for higher-density apartment forms within the downtown UGC and other priority nodes and corridors, notably the Major Transit Station Areas (MTSA) along the planned Light Rail Transit (LRT) and other transit lines. To the extent that higher density apartment forms are proposed as part of 'complete communities' in new greenfield areas the proponent should be required to show that these units would not compete or otherwise reduce demand within other local apartment markets, especially the downtown and key transit-oriented nodes. Implications for the planned distribution of intensification should also be addressed in terms of the shares of growth anticipated for the downtown, other nodes and corridors and established neighbourhoods.

Parcel Response

In preparing this Housing Assessment Report, we have relied on the intensification targets in the Ambitious Density Scenario, which assumes an average intensification rate of 60% between 2021 and 2051. In our opinion, this would not adversely affect the City-wide intensification objective, as it would result in 82,210 units being accommodated in the BUA between 2021 and 2051. This is greater than the number of units in the BUA that was considered in the Ambitious Density Scenario of the 2051 LNA (66,190 units) and in-line with OPA 167, which identifies 88,280 units in the BUA.

Further, based on the City of Hamilton *Residential Intensification Supply Update*, the City only has the potential to accommodate 72,300 units within the BUA. Therefore, the growth of 82,210 units forecast in this Housing Assessment Report exceed the known supply.

In our opinion, high-density unit growth forecasts in the expansion area are unlikely to compete with high-density units in the downtown and key transit-oriented nodes. The downtown and key transit-oriented nodes will have better access to transit, employment and amenities, in comparison to high-density units that are likely to be accommodated in the expansion area. Therefore, high-density units in the expansion area will appeal to a different type of buyer/renter. Furthermore, based on the forecasts in this Housing Assessment Report, there is only anticipated to be growth of approximately 2,500 apartment units in the expansion area, in comparison to growth of nearly 62,500 apartment units in the BUA.

3. Densification of Existing Neighbourhoods and the DGA Supply

Recognizing that a critical aspect of the City's no UBE strategy is to 'redirect' greenfield demand for ground-related housing to other potential opportunities within existing residential communities in the form of detached accessory units (i.e. laneway housing) proponents should be required to show how any proposed expansion would not impede that objective. The proponent should also be required to show that there are no opportunities for the reasonable densification of existing vacant DGA supply.

Parcel Response

In our opinion, a settlement boundary expansion of 1,780 hectares will not impede the objective of the City to densify existing neighbourhoods and the DGA supply, as ground-related ownership units to be accommodated in the expansion area are not a direct substitute for detached SDUs such as laneway units. As noted earlier, the SDU Memorandum states:

From a land needs perspective, therefore, detached SDUs within the Built-up Area is generally not a direct substitute for ground-related, ownership housing in greenfield areas. And in any event - to put it somewhat more plainly - there are just not that many of them. Even if the City of Hamilton were to achieve a level of building activity comparable to the City of Vancouver, these units would still only account for a very small part of the total housing demand to 2051. These types of units also tend to be expensive to build and maintain, which compounds the supply challenge. (emphasis added).

Furthermore, the LNA Technical Update notes that the City has a limited number of units in the urban area that have laneways, relative to cities such as Vancouver. Also, where laneways do exist in Hamilton, not all are public, meaning that primary access to the unit may not be maintained as a public right of way throughout the City. Therefore, there is a significant supply constraint in densifying existing neighbourhoods in the City.

As it relates to the vacant DGA supply, the LNA Technical Update states:

As explained in the City's March 2021 DGA Density Analysis report, a significant portion of the existing DGA is either already developed or subject to approved development applications. As a result, there is little opportunity to achieve further density increases without sacrificing public standards for parks, schools, institutions or environmental protection or undertaking a wholesale review of existing secondary plans in regards to housing mix;

Therefore, there are also limited opportunities to densify the vacant DGA supply. For these reasons, it is our opinion that the expansion area will not impede the City's objectives to densify existing neighbourhoods and the DGA

supply, as there are limited opportunities for densification and ground-related ownership units in the expansion area are not a direct substitute for detached SDUs such as laneway units.

4. The Greenfield Density Target

At a minimum, any new expansion areas should be required to achieve the planned greenfield density of new urban areas proposed as part of the Ambitious Density Scenario (approximately 77 residents and jobs per ha) which at the time was one of the highest DGA densities proposed within the Greater Toronto and Hamilton Area (GTHA). It is likely that innovative approaches will be required to deliver such a high DGA target without planning for significant greenfield apartment units, which are currently envisioned to be accommodated largely within the existing urban area. The City may wish to encourage new and flexible approaches achieving both high DGA density and intensification targets supported by fiscal impact analysis to illustrate implications to the municipal corporation.

Parcel Response

As part of the Housing Assessment Report, we have considered a density of 80 persons and jobs per hectare within the Community expansion area. This exceeds the density of 77 persons and jobs per hectare considered in the Ambitious Density Scenario of the 2051 LNA. We also note that the Draft Concept Plan for the Elfrida Urban Expansion Area considers a build-out density of 135 persons and jobs per hectare.

5. Phasing of Development

And finally, consistent with long-standing planning practice at the City and other fast-growing municipalities within the GTHA, and in accordance with both the 2020PPS (Section 1.1.3.7) and proposed PPS (2.3.1.6) the proponent should be required to show that any new expansion is orderly and aligns with the timely provision of infrastructure and public service facilities and avoids the uneconomical expansion of infrastructure into rural areas. The timing of growth, especially to the 2031 horizon is key. The likelihood of achieving the current 10 -year housing targets by interim period should be addressed, along with associated implications for the orderly provision of servicing infrastructure to the plan horizon. The issue of infrastructure spending, fiscal impact criteria and submission requirements is addressed in more detail in the next section.

Parcel Response

The response to this topic will be addressed, in part, through the Planning Justification Report and the Functional Servicing Feasibility/Options Report submitted as part of the OPA for a settlement area boundary expansion. However, as shown in Figure 1.1, the Elfrida Community is adjacent to the existing urban area of Hamilton and

therefore represents an orderly expansion to the settlement area boundary. As it relates to the provision of public service facilities, the *Development Charges Background Study, City of Hamilton, December 21, 2023*, includes new public service facilities proposed for Elfrida, including a new fire station, community centre and library, with a portion of the capital costs for the new fire station included in the 10-year growth period.

As it relates to the timing of growth, as shown in Figure 3.7, the City is forecast to add 45,070 housing units between 2021 and 2031. This includes 25,690 ground-related units. By comparison, the existing DGA is only estimated to have a supply of 12,680 ground-related units in 2021. Therefore, there is anticipated to be a shortfall of DGA to avoid housing shortages.



Appendix A:
Community Area 2051 Land
Needs

The following Appendix provides tables supporting the Community Area land needs in Hamilton to 2051

Figure A- 1

City of Hamilton Market-Based Housing Forecast

	Single / Semi-		Accessory		Total
	Detached	Row	Units	Apartment	
2021	132,005	27,589	7,634	55,576	222,805
2031	158,030	33,690	9,104	67,051	267,875
2041	186,156	39,506	10,461	77,984	314,107
2051	214,487	44,841	11,805	88,598	359,731
2021-2031	26,025	6,100	1,470	11,475	45,070
2031-2041	28,126	5,816	1,357	10,933	46,231
2041-2051	28,331	5,335	1,344	10,614	45,624
2021-2051	82,480	17,250	4,170	33,020	136,930
<i>2021-2051 Housing Mix</i>	60%	13%	3%	24%	100%

Source: Parcel.

Figure A- 2

Allocation of Housing Units, 2021-2051, Ambitious Density Scenario

	Single/Semi- Detached	Row	Accessory Units	Apartment	Total
Mix Inside the Built-up Area	5.0%	15.0%	4.0%	76.0%	100.0%
Mix in DGA and Rural	54.0%	40.0%	1.5%	4.5%	100.0%
Intensification Target					
2021-2031					50.0%
2031-2041					60.0%
2041-2051					70.0%
Units - Inside BUA	4,110	12,330	3,290	62,480	82,210
Units - DGA and Rural	29,550	21,890	820	2,460	54,716
Policy-Based Growth	33,660	34,220	4,110	64,940	136,926
Market-Based Growth	82,480	17,250	4,170	33,020	136,926
Policy-Based Growth	33,660	34,220	4,110	64,940	136,926
Difference Market vs Policy	(48,820)	16,970	(60)	31,920	0

Source: Parcel.

Figure A- 3

DGA Housing Supply Potential, Year End 2019

	Single/Semi- Detached	Rows	Apartments	Total
Ancaster	646	406	260	1,312
Dundas	1	0	0	1
Flamborough	1,051	599	3,215	4,865
Glanbrook	1,826	1,864	125	3,815
Hamilton	1,213	689	461	2,363
Stoney Creek	499	1,373	3,135	5,007
Fruitland-Winona	1,012	3,157	1,138	5,307
Total DGA Potential	6,248	8,088	8,334	22,670

Source: Parcel based on 2051 LNA.

Figure A- 4

Adjusted DGA Housing Supply Potential, Mid-Year 2021

	Single/Semi-			Total
	Detached	Rows	Apartments	
DGA Unit Supply Potential (2019)	6,248	8,088	8,334	22,670
Completions Year End 2019 to Mid 2021				
City wide Completions	910	1,220	1,200	3,330
Share of DGA Compltions	75%	80%	20%	57%
Estimated DGA Completions	680	980	240	1,900
DGA Unit Supply Potential 2021-2051	5,570	7,110	8,090	20,770

Source: Parcel based on 2051 LNA.

Figure A- 5

Adequacy of DGA Housing Supply to 2051

	Single/Semi-			Total
	Detached	Row	Apartment	
<i>Ambitious Density (50%/60%/70%)</i>				
Unit Growth 2021-2051 DGA	29,400	21,890	3,280	54,570
DGA Unit Supply Potential	5,570	7,110	8,090	20,770
Unit (Shortfall) or Surplus	(23,830)	(14,780)	n.a.	

Source: Parcel.

Figure A- 6

New Community Area Density Analysis, 2051

	Single/Semi-Detached	Rows	Apartments	Total
Unit (Shortfall) or Surplus	(23,830)	(14,780)	n.a.	(38,610)
Density Factors (units per hectare)	35	70	n.a.	43
Land Need for Residential Space (net ha)	680	210	n.a.	890
Factor to Account for Community Use ¹				50%
Community Area Land Needs (gross ha)				1,780
PPU	3.533	2.637	1.721	
Household Population	84,191	38,975		123,166
Household & Non-Household Population				125,017
Total Population				130,446
Jobs				16,306
Persons and Jobs				146,752
Density (Persons and Jobs per Ha)				82

¹ Assumes 50% of lands in the Community Area are required for non-residential uses, such as parks, roads, commercial uses, etc. Consistent with the assumption used in the 2051 LNA.

Source: Parcel.



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