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WHITE CHURCH URBAN BOUNDARY EXPANSION AREA

Land Needs Analysis

City of Hamilton, Ontario

Prepared for **Whitechurch Landowners Group**

February 3, 2025

urbanMetrics inc.
15 Toronto St, Suite 602
Toronto ON M5C 2E3
Tel: 416-351-8585
urbanMetrics.ca

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Whitechurch Landowners Group Inc.
7501 Keel Street, Suite 200
Vaughan, Ontario L4K 1Y2

Dear Whitechurch Landowners:

RE: **White Church Urban Boundary Expansion Area** – Land Needs Analysis (City of Hamilton, Ontario)

urbanMetrics inc. is pleased to submit this Land Needs Analysis in support of the proposed expansion of the City of Hamilton Urban Boundary which will include a 364 hectare (~900 acre) parcel of land (the "subject lands"). These lands are bounded by Upper James Street, Miles Road, Airport Road East and White Church Road East. These lands are being planned with low density and medium density residential built forms, along with parks, schools, green space, and commercial space.

As part of the submission requirements, the City of Hamilton requires a land needs assessment to demonstrate that there is a need for additional lands to meet the current and future need for ground-related housing, that will meet the minimum density targets and support the City's intensification objectives.

Our study has concluded that this proposed urban boundary expansion is necessary in order to meet the expected demand for ground-related housing to 2051, meet the minimum density targets, and will not impact the delivery of apartment units in the designated intensification centres and nodes.

Yours very truly,

Mr. Douglas R. Annand, PLE
Partner,
urbanMetrics Inc.

Mr. Daniel Bailey
Project Manager,
urbanMetrics Inc.

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1.0 Introduction

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1.1 Purpose

This Land Needs Assessment's purpose is to address and evaluate the need for additional land to meet the need for housing, as laid out in Policies 2.3.2.1(a) and 2.2.1 of the 2024 PPS, with the concept of "need" guided by the five topic areas in the City of Hamilton Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications.

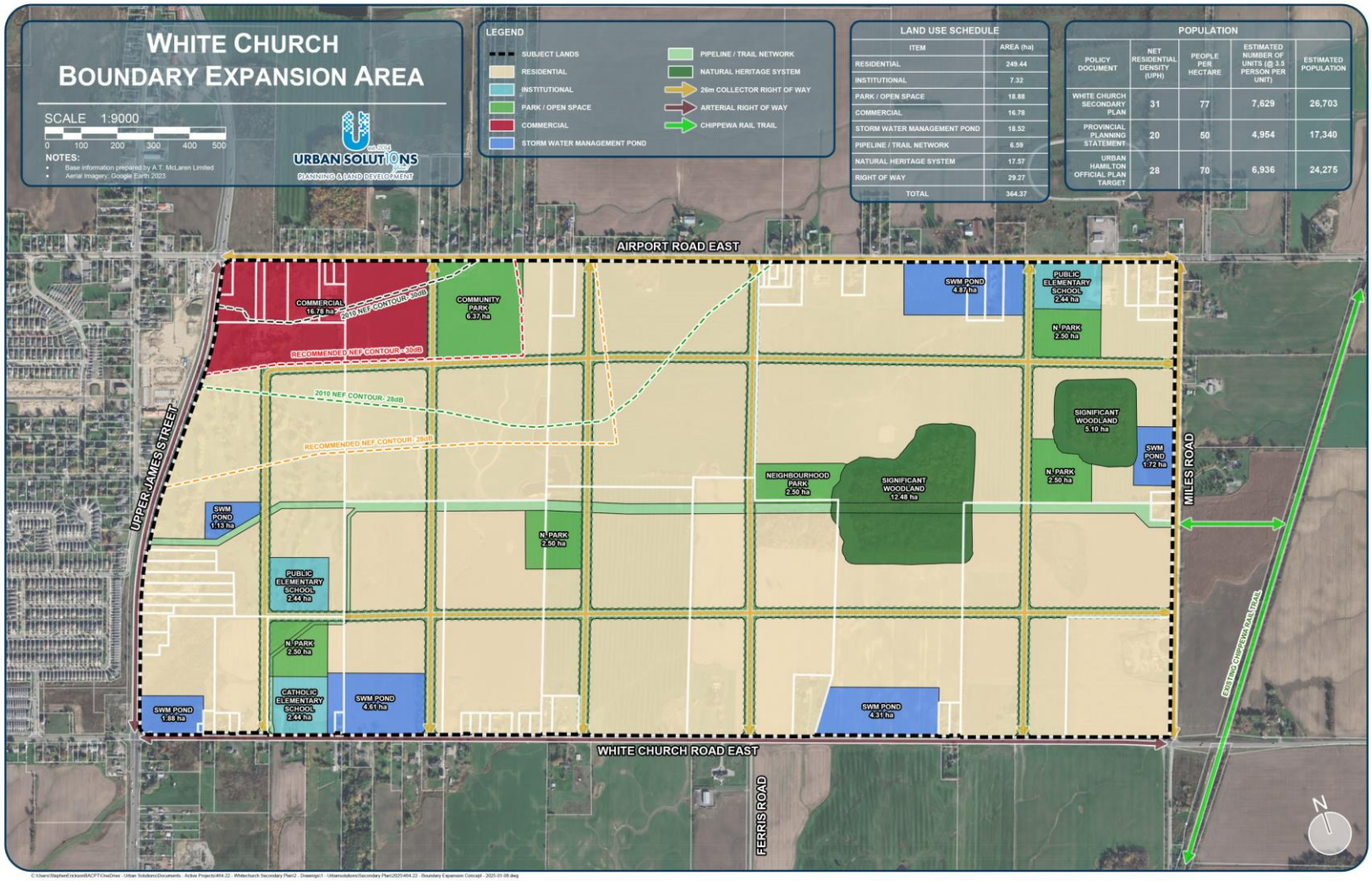
1.2 Concept Plan

Based on a preliminary draft land use plan provided by UrbanSolutions Planning & Land Development Consultants Inc. ("UrbanSolutions") dated January 2025 (see Figure 1-1), the White Church Urban Boundary Expansion Area will be comprised of 364.37 hectares (900.38 acres) of land. This plan includes 249.44 hectares (616.38 acres) of primarily low and medium density residential development, with 16.78 hectares (41.46 acres) of commercial space. The plan also includes institutional, parks and open space, trails, stormwater management ponds, and an internal road network. The greenfield area after the required exclusion of the natural heritage lands amounts to approximately 346.80 hectares (856.96 acres).

The estimated population of the White Church Urban Boundary Expansion Area is 26,703 based on a gross density of 77 people per hectare (excluding natural areas).

The current concept plan includes 7,629 units with an average persons per unit (PPU) factor of 3.5.

Figure 1-1: Whitechurch Urban Expansion Area Concept Plan



SOURCE: Urban Solutions Planning and Land Development

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It is our understanding that the residential area in the plan is currently to be developed primarily as low density (detached and semi-detached) and medium density (townhouse and duplex) built forms. The 2023 City of Hamilton Development Charges Background Study identifies a Persons Per Unit (PPU) rate of 3.533 for newly built low-density units, 2.637 for medium density units, and 1.721 for high density units (apartments). These density figures have not been adjusted for census undercount, while the Growth Plan and Ministry of Finance population projections are adjusted for census undercount. The adjusted PPUs to account for undercount have been shown in Figure 1-2 below. Using these adjusted PPUs, the listed population and unit counts in Whitechurch Boundary Expansion Area would result in 80% detached and semi-detached units, and 20% townhouse units to reach an average PPU of 3.5. This is just one possible unit mix, and additional population density could be accommodated by replacing single-detached units with semi-detached houses, street townhomes, back-to-back and stacked townhomes, which would increase the unit count and total population. As shown in Figure 1-3 a population of 26,703 can be accommodated in a range of unit mixes, with a larger total number of units required the greater the share of townhomes. At 100% townhomes a total of 9,705 units would be required, and at 100% single and semi-detached a total of 7,244 units would be required. As the target density of 77 people and jobs per hectare is measured in population density rather than unit density, the results of this land needs analysis would not change with a different unit mix with the same population density.

Figure 1-2: Census and Undercount Adjusted Persons Per Unit (PPU)

Unit Type	Census PPU	Undercount Adjustment	Adjusted PPU	Whitechurch Unit Mix
Singles and Semi-Detached	3.533	4.16%	3.686	80%
Other Multiples	2.637	4.16%	2.751	20%
All Apartments	1.721	4.16%	1.796	0%
Apartments - 2 Bedrooms +	2.166	4.16%	2.260	0%
Apartments - Bachelor and 1 Bedroom	1.342	4.16%	1.400	0%
Residential Facility	1.100	4.16%	1.148	0%

SOURCE: urbanMetrics Inc., based on 2023 City of Hamilton Development Charge Background Study PPUs, adjusted by the 2021 City of Hamilton census undercount rate of 4.16%.

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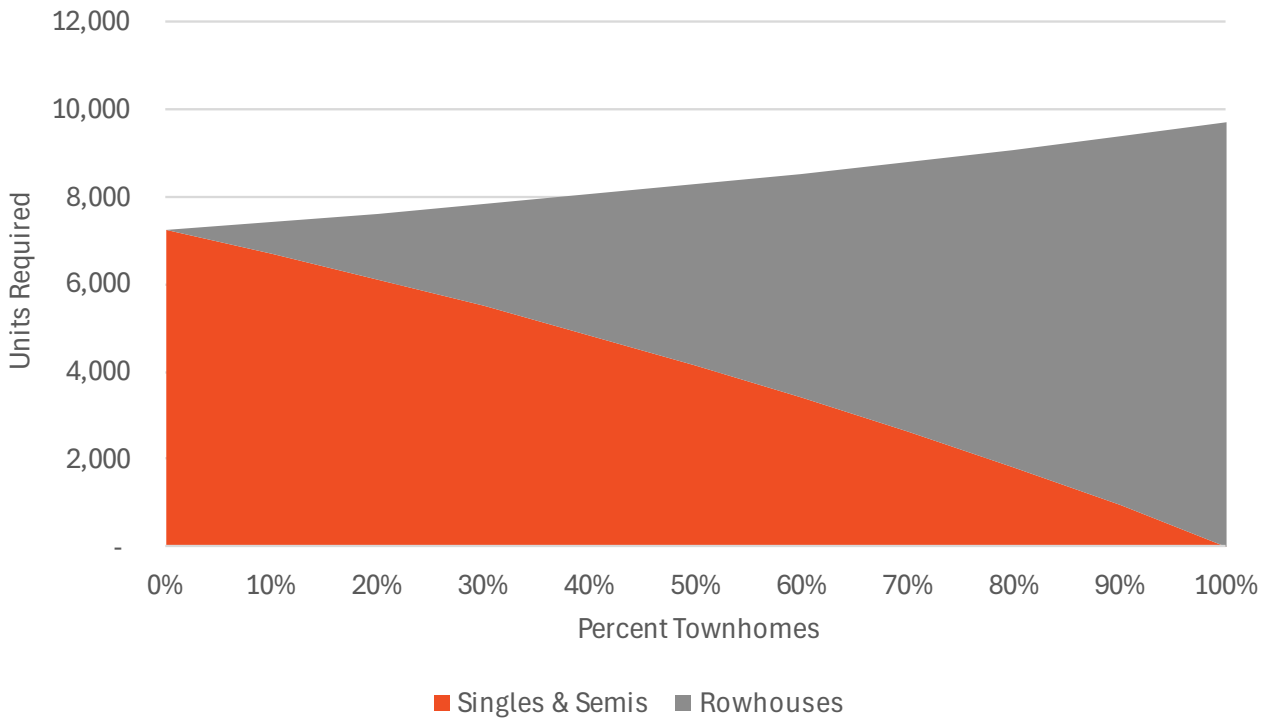
Figure 1-3: Possible Unit Mixes With 26,700 Residents



SOURCE: urbanMetrics Inc.

1.3 Urban Boundary Expansion Decision History

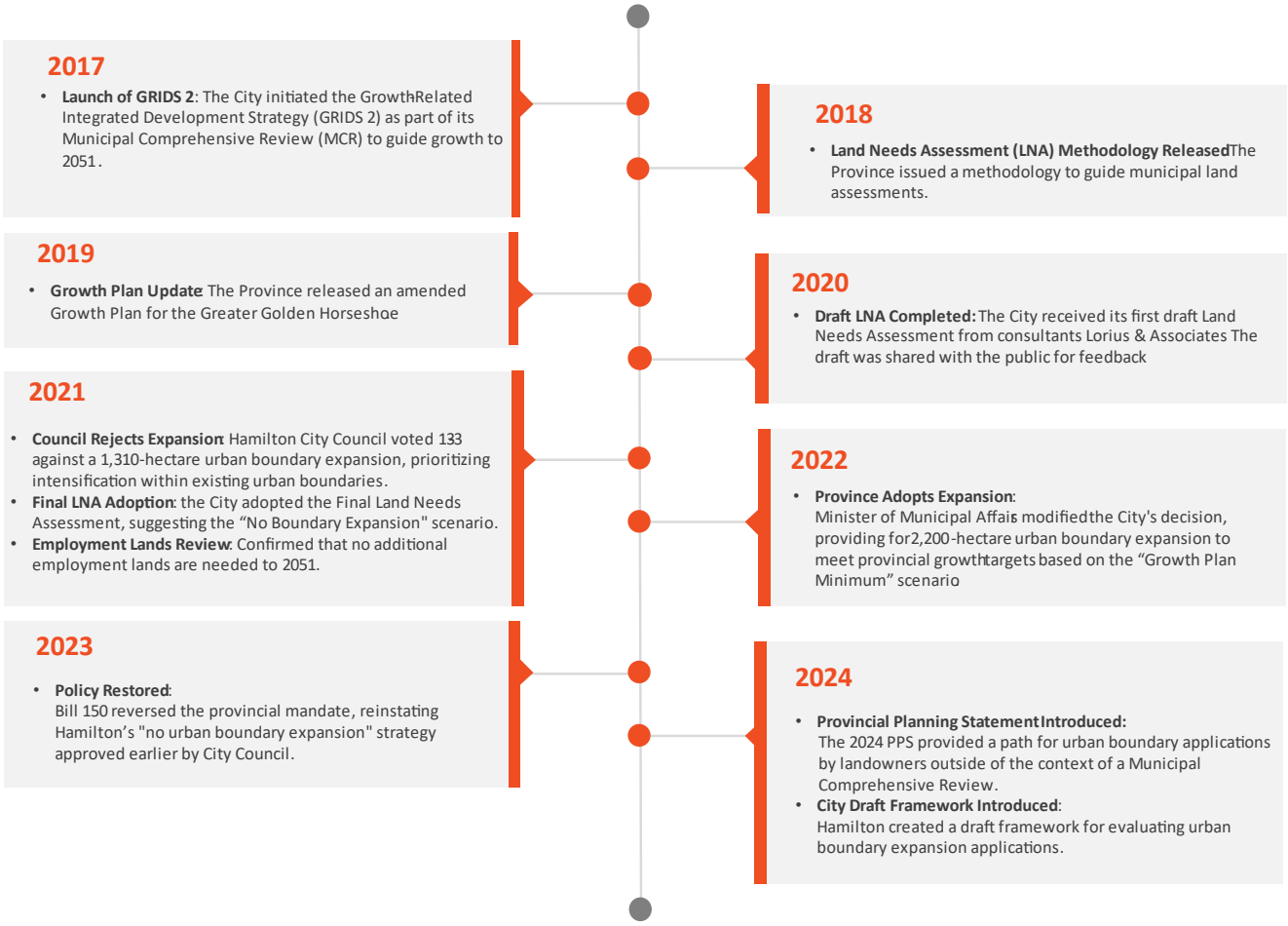
The decision history that resulted in urban boundary expansion in Hamilton is much more complex than in most municipalities, as shown in Figure 1-3. The process began in 2017 with the launch of GRIDS 2, the document that was to guide growth to 2051 as part of the Municipal Comprehensive Review. In 2018, the province released the Land Needs Assessment (LNA) Methodology, setting the framework for municipal land needs assessments, followed by an amended Growth Plan in 2019.

In 2020, Hamilton completed its first draft LNA undertaken by Antony Lorius Associates, requesting public feedback. The LNA concluded that an intensification target of 50% for the current period would be considered a suitable and

aspirational goal for the City based on the data. This LNA was also peer reviewed by Watson & Associates, who found that the approach and methodology used by Lorius in their LNA was an appropriate application of the Growth Plan and Provincial LNA Methodology. By 2021, City Council adopted the "No Boundary Expansion" scenario while rejecting a 1,310-hectare (3,237 acres) expansion, emphasizing the requirement that intensification occur within the existing urban boundary. The same year, the Employment Lands Review confirmed that no additional employment lands were needed.

In exercising his approval authority as Minister of Municipal Affairs, the Minister modified the Hamilton Official Plan to ensure conformity with the Growth Plan by providing for a 2,200 hectare (5,436 acres) settlement area expansion to accommodate growth to the horizon of the plan in 2051. This was based upon Hamilton's Land Needs Assessment, undertaken by Antony Lorius Associates, and the "Growth Plan Minimum" scenario. In 2023, the province adopted Bill 150 returning the question of the Official Plan settlement area boundaries to Hamilton Council. Hamilton Council chose to return to a "no urban boundary expansion" scenario. Provincial Planning Act changes and the subsequently adopted policies of the new 2024 Provincial Planning Statement now provide a path for urban boundary applications by landowners outside the context of a Municipal Comprehensive Review. In 2024, in response to these changes, Hamilton Council endorsed criteria recommended by staff under which settlement area expansions would be considered and evaluated.

Figure 1-4: Hamilton's Urban Boundary Expansion Timeline



SOURCE: urbanMetrics Inc.

1.4 City of Hamilton Land Needs Assessment Results

The Land Needs Assessment (LNA) prepared by Antony Lorius Associates on behalf of the City of Hamilton outlined four growth scenarios for Hamilton to 2051, each varying in intensification rates, housing distribution, and land requirements. These scenarios have different trade-offs between greenfield expansion, urban intensification, and satisfying housing need, guiding the city's long-term growth strategy. The no urban boundary scenario was later prepared in response to direction from City Council.

Figure 1-5: City of Hamilton 2021 Land Needs Analysis Intensification scenarios

Scenario	Intensification Rate	Units				Land Need (ha)
		Ground-Related	Accessory Units (ADUs)	Apartment	Total	
Scenario 1: Current Trends	40%	71,050	2,800	36,520	110,320	3,440
Scenario 2: Growth Plan Minimum*	50%	62,880	3,030	44,400	110,320	2,190
Scenario 3: Increased Targets	55%	58,800	3,170	48,350	110,320	1,630
Scenario 4: Ambitious Density	60%	54,720	3,310	52,290	110,320	1,340
Scenario 5: No Boundary Expansion	80%	n.a.	n.a.	n.a.	110,300	0

SOURCE: urbanMetrics Inc., with data from March 2021 *City of Hamilton Land Needs Assessment to 2051 Technical Working Paper – Summary of Results*, and City of Hamilton UHOP.
* Scenario based upon conformity with policies of the Growth Plan for the Greater Golden Horseshoe, and the Provincial Land Needs Assessment Methodology.

Scenario 1: Current Trends (40% Intensification)

The Current Trends scenario assumes an intensification rate of 40%, meaning 60% of new housing would occur outside the existing urban boundary. This approach prioritizes low-density, ground-related housing and heavily relies on greenfield expansion. It requires 3,440 hectares (~8,500 acres) of new land, making it the most land-intensive scenario. Of note, despite the title of "Current Trends", this scenario would only meet 75% of the growth in market demand for ground related housing in Hamilton between 2021 and 2051. This scenario includes a significant shift towards apartment built forms away from the historic demand patterns. While this scenario is most aligned with historical demand patterns, it still has a significant departure from them. Despite this, the results show significant additional land needs.

Scenario 2: Growth Plan Minimum (50% Intensification)

This is the only scenario that satisfied the requirement of the Provincial Land Needs Assessment Methodology to provide "a market-based supply of housing to the extent possible" while conforming to the Growth Plan minimum targets for intensification and designated greenfield area densities. This scenario aligns with the minimum requirements of the now superseded Growth Plan, which mandated a 50% intensification rate. Half of all new housing would be developed within the existing urban boundary, while the remaining 50% would occur in greenfield areas. The land required under this scenario is reduced to 2,190 hectares (~5,410 acres), a significant reduction compared to the Current Trends scenario. While it reduces land needs to some extent, it still involves a substantial urban boundary expansion.

Scenario 3: Increased Targets (55% Intensification)

The Increased Targets scenario increases the intensification rate to 55%, shifting a greater proportion of new housing into existing urban areas. This scenario assumes even greater changes in housing development patterns and relies less on urban boundary expansion than the Growth Plan Minimum. As a result, the land needed decreases to 1,630 hectares (~4,030), reflecting a further reduction in land needs and an increase in apartment units.

Scenario 4: Ambitious Density (60% Intensification)

The Ambitious Density scenario targets an intensification rate of 60%, with a focus on accommodating most new housing within existing urban boundaries. It requires 1,340 hectares (~3,310 acres) of urban expansion, the smallest amount among the various scenarios. This scenario requires the greatest shift toward apartment units, well beyond current market demand.

Scenario 5: No Urban Boundary Expansion (80% Intensification)

The No Urban Boundary Expansion scenario assumes an intensification rate of at least 80%, with all new growth occurring within the existing urban boundary. This scenario requires no additional land for expansion and focuses exclusively on intensification. This scenario assumes a significant shift in housing types toward high-density urban development and presents extreme challenges in meeting market demand for ground-related housing. This scenario was not initially suggested in the 2021 land needs analysis.[1]

1.5 Employment Impact

The White Church Urban Expansion Area will not contain any *Employment Area* lands and is not directly adjacent to any Employment Lands. Of note, the current Planning Act, 1990, uses the term "*Area of Employment*", which includes industrial, manufacturing, warehousing, and supportive uses, and specifically excludes institutional, retail, and office uses. These allowed and excluded uses are consistent with those laid out for *Employment Areas* in the PPS 2024. The closest

[1] As identified in the City of Hamilton Market and Land Supply Monitoring Report 2023, 2023 was the first time the City has achieved this intensification rate, with a residential Intensification rate of 90%. This was largely caused by a combination of the lowest number of new residential units outside the built boundary and the highest number of units inside the built boundary. As identified by CMHC housing start data, in 2023 over 75% of unit starts were apartments, however in 2024 it had fallen to 57% as the number of apartment starts dropped by two thirds, and total starts dropped to the lowest levels since 2015. As a result it is likely that moving forward this intensification rate cannot be sustained, though it will likely take 2 years for this change in starts to impact completions.

Employment Area lands are located to the northwest of Homestead Drive and Airport Road East, beyond the lands designated as *District Commercial* along both sides of these roads. The proposed White Church Urban Expansion Area will not have any impact on existing *Employment Area* lands, or on the future supply of *Employment Area* lands. As identified in the City of Hamilton's *Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications* an Employment Assessment is only needed when the urban expansion area includes lands intended for Employment uses. In line with this, the urbanMetrics Land Needs Analysis does not include an evaluation of Employment Lands.

Of note, as identified in the Growth Plan forecasts there are four land-use based categories of employment: population-related, major office, employment land, and rural. The White Church Urban Expansion Area is expected to only contain population-related employment. This type of employment includes retail, education, health care, local government and urban work-at-home employment. Within the White Church Urban Boundary Expansion Area this will primarily be retail and service commercial employees in the Commercial block, work-at-home employees in the residential areas, and school employees in the three new elementary schools. Employment is added to population when calculating the people and jobs per hectare.

The City of Hamilton's previous 2021 Land Needs Assessment assumed that 50% of new community area land would be "parks and walkways, open space, commercial and institutional use, storm water management (SWM) facilities and other utilities such as power corridors" (p. 29, *City of Hamilton Land Needs Assessment to 2051 Technical Working Paper – Summary of Results*, March 2021). The population-related employment calculated in that Land Needs Assessment was largely assigned to the Community Area, which did not have a specific land need beyond the 50% ratio. Our analysis is consistent with this approach.

The onsite employment generated by employees in the retail and service commercial uses on the commercial lands, work-from-home employees in the residential areas, school employees in the three proposed schools, city staff in recreation facilities, and any emergency services, will all contribute to the employment accommodated within the White Church Urban Boundary Expansion Area. The employment generated by schools, recreation facilities, and emergency services is currently unknown. Based on the estimated commercial floor area in the proposed commercial block and employee density from the Hamilton Development Charges Background Study, the commercial block could contain 1,130 jobs, with an additional 730 jobs supported by offsite commercial space. This assumes a traditional shopping centre format but at greater retail densities more commercial

jobs would be accommodated onsite. Based on the Statistics Canada May 2024 work from home rate for the Hamilton CMA, and the 2021 Census employed Hamilton labour force participation rate, approximately 2,800 additional jobs will be located in the White Church Urban Expansion Area.

2.0 Planning Policies

There are two principal planning policy documents which are relevant to Hamilton's land needs, namely the 2022 Urban Hamilton Official Plan (UHOP), and the Provincial Planning Statement, 2024. These documents lay out the forecast population and housing growth, as well as policies for how to accommodate this growth.

2.1 Provincial Planning Statement, 2024

The Provincial Planning Statement, 2024 (PPS) came into effect on October 20,2024, and replaces both the Provincial policy Statement, 2020, and A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (Growth Plan). As identified in Policy 2.1.1, planning authorities (including municipalities) must base their population and employment growth on the Ministry of Finance's population projections, which are published annually:

> *"2.1.1 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."*

Of note, is the fact that municipalities can continue using previous population and employment forecasts issued by the province, such as those under the Growth Plan, as stated in policy 2.1.2:

> *"2.1.2 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."*

Forecasts must be accommodated by having enough land for 20-30 years when an official plan is created, or updated, as identified in policy 2.1.3. At the same time, policy 2.1.4 requires municipalities to accommodate 15 years of residential growth on designated and available lands, with three years of residential demand available on serviced and zoned lands, including units that are draft approved or in registered plans.

> *"2.1.3 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.*

Where the Minister of Municipal Affairs and Housing has made a zoning order, the resulting development potential shall be in addition to projected needs over the planning horizon established in the official plan. At the time of the municipality's next official plan update, this additional growth shall be incorporated into the official plan and related infrastructure plans."

"2.1.4 To provide for an appropriate range and mix of housing options and densities required to meet projected requirements of current and future residents of the regional market area, planning authorities shall:

a) maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands which are designated and available for residential development; and

b) maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned, including units in draft approved or registered plans."

Policy 2.2.1 requires that planning authorities provide for housing options that meet the needs of current and future residents of the regional market area, including by land use planning for the full range of housing options. As a single-tier municipality the *Regional market Area* is the City of Hamilton.

"2.2.1 Planning authorities shall provide for an appropriate range and mix of housing options and densities to meet projected needs of current and future residents of the regional market area by:

a) establishing and implementing minimum targets for the provision of housing that is affordable to low and moderate income households, and coordinating land use planning and planning for housing with Service Managers to address the full range of housing options including affordable housing needs;

b) permitting and facilitating:

1. all housing options required to meet the social, health, economic and wellbeing requirements of current and future residents, including additional needs housing and needs arising from demographic changes and employment opportunities; and

2. *all types of residential intensification, including the development and redevelopment of underutilized commercial and institutional sites (e.g., shopping malls and plazas) for residential use, development and introduction of new housing options within previously developed areas, and redevelopment, which results in a net increase in residential units in accordance with policy 2.3.1.3;*

c) *promoting densities for new housing which efficiently use land, resources, infrastructure and public service facilities, and support the use of active transportation; and*

d) *requiring transit-supportive development and prioritizing intensification, including potential air rights development, in proximity to transit, including corridors and stations."*

Growth must be planned for using intensification targets with density targets in designated growth areas encouraged. Policy 2.3.1.4 requires minimum intensification targets to be developed for built-up areas, and municipalities are encouraged to plan for a target of 50 residents and jobs in designated growth areas in Policy 2.3.1.5. The City of Hamilton is identified as a large and fast-growing municipality in Schedule 1 of the PPS.

"2.3.1.4 *Planning authorities shall establish and implement minimum targets for intensification and redevelopment within built-up areas, based on local conditions.*

2.3.1.5 *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 in previous provincial policy documents, the PPS does not forbid settlement boundary expansions outside of a municipal comprehensive review, and as a result boundary expansions may occur at any time. When considering new settlement areas or settlement boundary expansions planning authorities must consider a range of criteria as laid out in policies 2.3.2.1 and 2.3.2.2:

"2.3.2.1 *In identifying a new settlement area or allowing a settlement area boundary expansion, planning authorities shall consider the following:*

a) the need to designate and plan for additional land to accommodate an appropriate range and mix of land uses;

b) if there is sufficient capacity in existing or planned infrastructure and public service facilities;

c) whether the applicable lands comprise specialty crop areas;

d) the evaluation of alternative locations which avoid prime agricultural areas and, where avoidance is not possible, consider reasonable alternatives on lower priority agricultural lands in prime agricultural areas;

e) whether the new or expanded settlement area complies with the minimum distance separation formulae;

f) whether impacts on the agricultural system are avoided, or where avoidance is not possible, minimized and mitigated to the extent feasible as determined through an agricultural impact assessment or equivalent analysis, based on provincial guidance; and

g) the new or expanded settlement area provides for the phased progression of urban development.

2.3.2.2 Notwithstanding policy 2.3.2.1.b), planning authorities may identify a new settlement area only where it has been demonstrated that the infrastructure and public service facilities to support development are planned or available."

In particular, Policy 2.3.2.1(a) requires planning authorities to consider the need for an appropriate range and mix of uses when planning for urban boundary expansions. As providing for an appropriate mix of housing options is specifically mentioned in Policy 2.2.1, the need for an appropriate mix of housing should be considered.

While specific criteria for need or an appropriate range of uses is not specified, we havegiven consideration to the City Of Hamilton's Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications criteria in our land needs analysis.

2.2 Urban Hamilton Official Plan (UHOP)

As identified in Policies 2.3.1 and 2.3.2, the population of Hamilton is forecast to grow to 820,000 residents and 332,800 households by 2051 (see Figure 2-1). These forecasts are based on Schedule 3 of the Growth Plan for the Greater Golden Horseshoe. The Growth Plan along with the Provincial Policy Statement have both been largely replaced by the new Provincial Planning Statement, 2024, though municipalities may continue to use the previous forecasts. As a result, the UHOP growth forecasts are still consistent with provincial policy.

Figure 2-1: UHOP Population and Household Forecasts

Table A.1 - Population Forecasts, 2021-2051 (OPA 167)

Year	Population
2021	584,000
2031	652,000
2041	733,000
2051	820,000
Change 2021- 2051	236,000

Source: Hemson Consulting Ltd. Based on Statistics Canada Census data and Growth Plan Schedule 3 forecasts for 2051.

Table A.2 – Household Forecasts, 2021- 2051

Year	Households
2021	222,500
2031	258,100
2041	295,200
2051	332,800
Change 2021-2051	110,300

Source: Hemson Consulting Ltd. based on Statistics Canada Census data and Growth Plan Schedule 3 forecasts for 2051.

SOURCE: Urban Hamilton Official Plan

As stated in policy 3.2.4.10 a 15 year supply of residential growth is required to be maintained, including growth through both intensification and new developments:

> *"3.2.4.10 The population and household forecasts in Tables A.1 and A.2 will be used to maintain, at all times:*

a) *the ability to accommodate residential growth for a minimum of 15 years through residential intensification and redevelopment, and lands designated and available for residential development within the City's urban area; and,*

b) *where new development is to occur, land with servicing capacity sufficient units available through suitably zoned lands to facilitate residential intensification, and lands in draft approved or registered plans."*

In order to achieve the above number of units, the UHOP also lays out density targets for the Downtown Urban Growth Centre, Greenfield, and residential Intensification in Policies 2.3.4.1, 2.3.4.2, 2.3.4.3, and 2.3.4.4. The Downtown Urban Growth Centre has a target density of 500 people and jobs per hectare by 2051, while Greenfield development has a minimum density of 60-70 people and jobs per hectare depending on location and approval status, with 80% of residential development required to occur within the built-up area.

"Downtown Urban Growth Centre Density Target

2.3.4.1 Hamilton's Downtown Urban Growth Centre has been planned to achieve a minimum gross density of 500 people and jobs per hectare by 2051. Overall density in excess of this target may be achievable and desirable.

Greenfield Density Target

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.

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.

Residential Intensification Target

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 above targets are required to be monitored to ensure that there is an adequate supply of land for up to a 30 year time horizon, as stated in policy 3.5.1. This monitoring is to be done on an annual basis:

"3.5.1 The City shall monitor the designated urban land supply to ensure there is sufficient land available to accommodate a mix and range of housing types, employment opportunities, and other land uses to meet the projected needs for up to a 30 year time horizon. The monitoring shall include annual reporting on the following:

a) the residential intensification rate;

b) the planned density of the designated greenfield area;

c) the planned density of the urban growth centre and other urban nodes;

d) construction activity including the range and mix of housing types;

e) the Vacant Residential Land Inventory;

f) comparison of the City's actual population and employment growth to the forecasted population growth identified in policy A.2.3.1 and employment growth identified in Policy A.2.3.2;

g) employment and land absorption; and,

h) housing affordability."

2.3 City of Hamilton Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications

On August 13, 2024, The City of Hamilton Planning Committee directed that City staff use the Draft Framework for Processing and Evaluating Urban Boundary Expansion Applications (Appendix "A" to Report PED24109) when they review an Official Plan Amendment for urban boundary expansion applications until established in the Urban and Rural Official Plans through Official Plan Amendments. Section 2.2 of Appendix "A" to Report PED24109 outlines five key topic areas that Urban Boundary Expansion (UBE) applications should address, as part of the Housing Submission Requirements. These five topic areas are listed below.

- *"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.*

- *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.*
- *Densification of Existing Neighbourhoods and 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.*
- *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.*
- *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 2020 PPS (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."

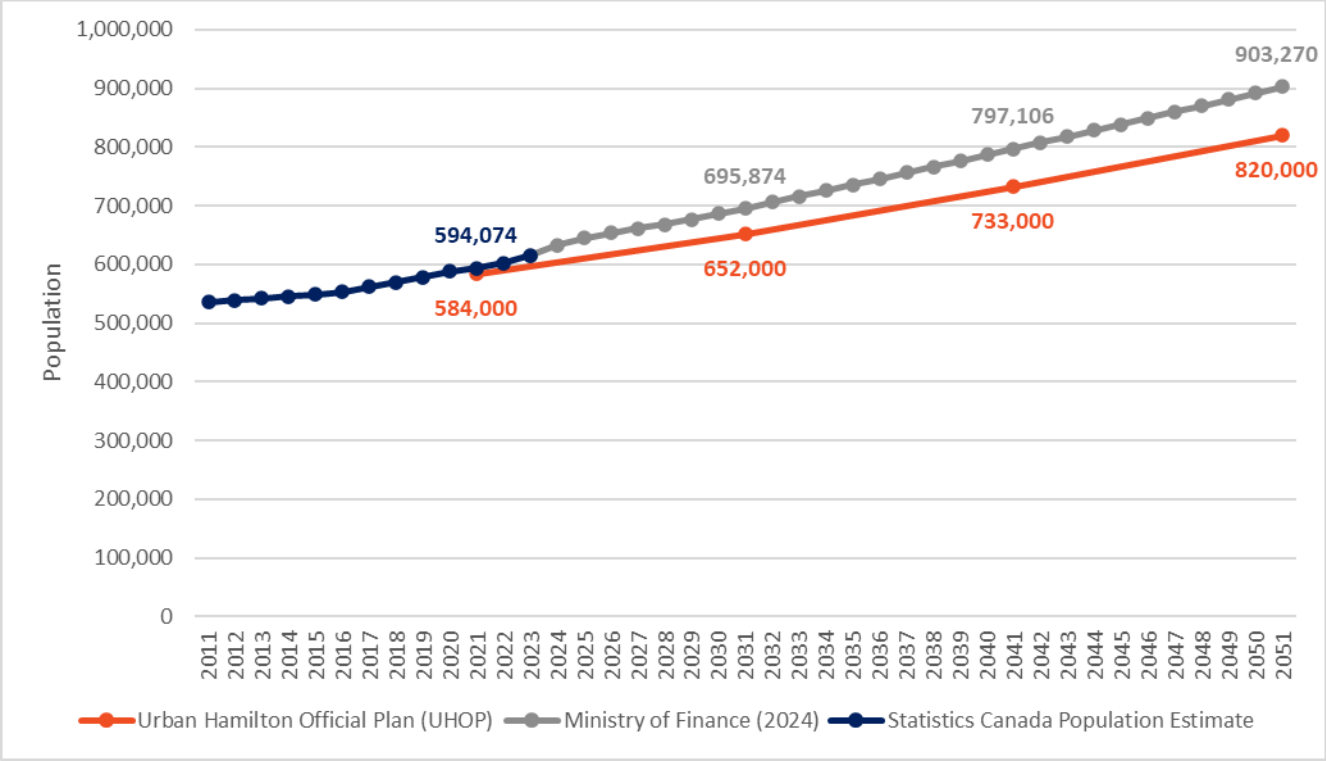
3.0 Population Forecast

3.1 Growth Plan and Ministry of Finance Population Projections

The new Provincial Policy Statement, 2024 (PPS) requires planning authorities to base population growth on the Ontario Population Projections published by the Ministry of Finance. However, the Urban Hamilton Official Plan (UHOP) growth policies are based on the Growth Plan's 2051 population forecast, and as mentioned in Section 2.1 of this report the City may continue to use these forecasts under the PPS. urbanMetrics has conducted our land needs analysis using both the Growth Plan and Ministry of Finance population projections in recognition of this policy change.

As shown in Figure 3-1 the Ministry of Finance (2024) population projection identifies an additional 83,270 residents in Hamilton by 2051 compared to the UHOP growth forecasts which are much lower. The Ministry of Finance projection identifies a total population of 903,270 residents by 2051 compared to the UHOP forecast of 820,000 residents. The actual 2023 City of Hamilton population is 17,644 higher than forecasted by the UHOP/Growth Plan suggesting that the Ministry of Finance projections maybe more accurate.

Figure 3-1: Urban Hamilton Official Plan vs. Ministry of Finance Population Projections, City of Hamilton



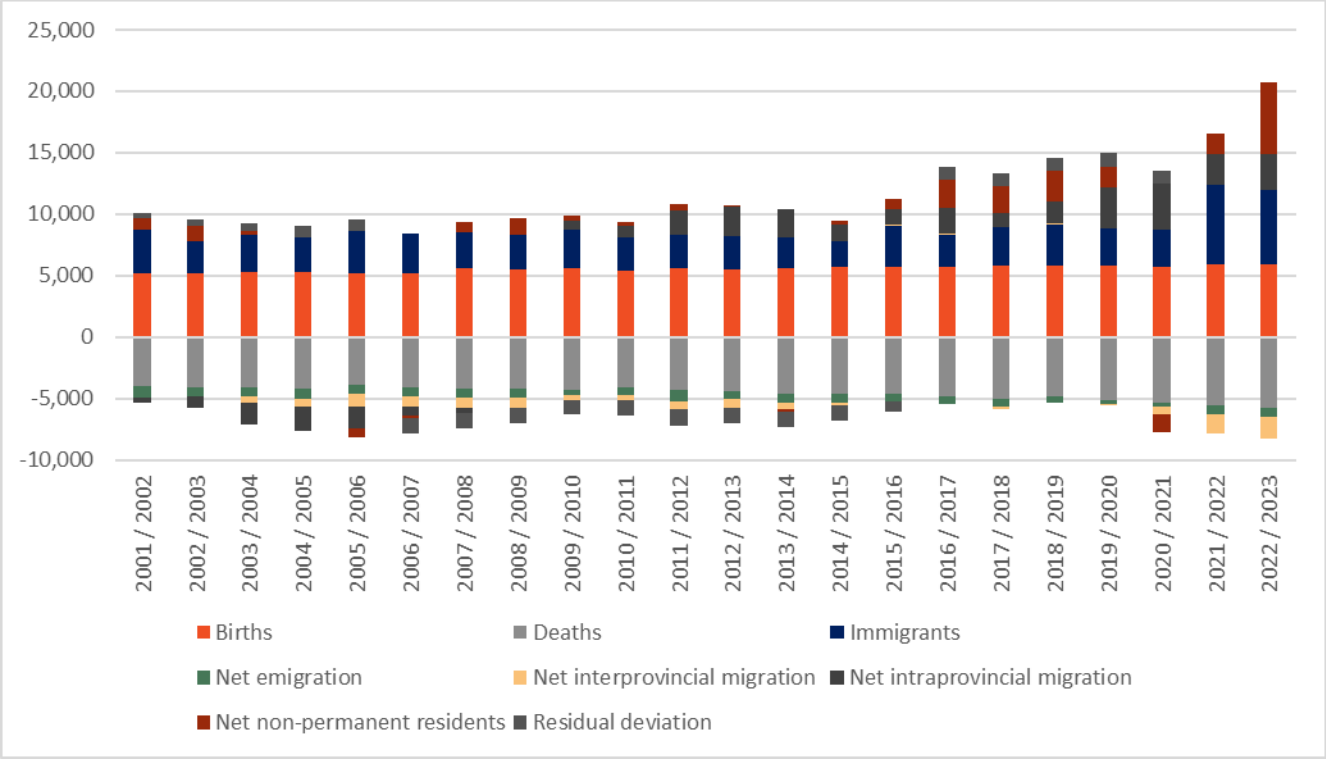
SOURCE: urbanMetrics Inc., with data from UHOP, Ministry of Finance Population Projections (2024), and Statistics Canada. Table 17-10-0155-*01 Population estimates, July 1, by census subdivision, 2021 boundaries*.

The cause of the differences between the UHOP/Growth Plan forecasts and the Ministry of Finance population projections is the information that was available at the time they were last updated. The UHOP/Growth Plan population forecast was last updated in 2020, while the Ministry of Finance population projections were last updated in 2024. As a result, the Ministry of Finance population projections benefit from a more recent base year of 2023, which incorporates the population figures from the 2021 census, reflects the short- and medium-term impacts of COVID-19, and the increased federal immigration targets, plus the Statistics Canada Population Estimates up to 2023, none of which were available in 2020. As shown in Figure 3-2 below, the 2021/2022 and 2022/2023 number of immigrants (permanent residents) and new non-permanent residents were significantly higher than in previous years.

However, in October 2024 the Federal government significantly reduced the 2025 and 2026 permanent resident targets from 500,000, to 395,000 and 280,000 respectively. These changes were announced after the Ministry of Finance had

released the 2024 population projections. As this represents a return to 2019 immigration levels, the current (2024) gap between the Ministry of Finance population projection and the UHOP forecast of 28,494 residents is unlikely to close over the forecast period.

Figure 3-2: Statistics Canada Components of Population Change, City of Hamilton



SOURCE: urbanMetrics Inc., with data from Statistics Canada. Table 17-10-0153-01 *Components of population change by census division, 2021 boundaries*.

3.2 Growth Plan Unit Forecast

As shown in Figure 3-3 the Growth Plan population forecasts for Hamilton were prepared by Hemson Consulting, and the Hamilton forecast assumed more rapid growth, higher in-migration, and revitalization in the city's employment areas and in the downtown. However, Hemson did not have access to the 2021 census data, or the higher federal immigration rates announced in the years following their analysis. As a result of rounding the 2051 population numbers are slightly different in Schedule 3 of the Growth Plan which are rounded to the nearest 10,000 persons.

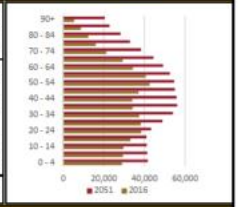
The corresponding unit forecast of 332,000 units by 2051 is the basis for the UHOP forecast of 332,800 units by 2051. However, as shown below this unit forecast is based on a specific number of ground-related and apartment units. As stated in footnote one of Figure 3-3 "The housing forecast does not replicate/predict the housing mix that would be determined through each municipality's APTG conformity work. Planned housing mixes will continue to be decided by municipalities through their local planning processes." As a result, the housing forecasts are not binding, and the housing mix can be determined by the local municipality. However, as the number of Persons Per Unit (PPU) for apartment and ground-related dwelling units may be very different, the total number of units needed will change if a different housing mix is selected. The overall 2051 PPU for Hamilton in the Growth Plan forecast is 2.479, compared to the 2021 census adjusted PPU of 2.666.

Figure 3-3: Hemson Growth Forecasts to 2051, City of Hamilton

City of Hamilton

Although one of the oldest urban centres in the GGH, increasingly integrated housing and labour markets have drawn the City of Hamilton closer into the social and economic orbit of the broader GTAH in recent decades. The City is home to a major university (McMaster) and its economy is more industrialized than in the rest of the GTAH, with a heavy emphasis on manufacturing. The 2012 Schedule 3 forecasts generally overestimated population and employment in Hamilton to 2019, though the pattern of growth in the last few years is evidence of a rejuvenating City. The 2020 forecasts assume more rapid growth moving forward. Population growth will be driven by significantly higher levels of in-migration from the rest of the GTAH than in the past. The employment forecast is predicated on the diversification of the local economy, the revitalization of existing employment areas and the downtown, and the emergence of small major office clusters. Employment growth will be supported by well located and extensive employment areas throughout the City.

Year	Population			Housing By Type[1]			Population Age Structure
	Reference	High	Low	Ground-Related	Apartments[2]	Total	2016 and 2051
2011	535,000	535,000	535,000	152,000	51,000	203,000	
2016	552,000	552,000	552,000	159,000	52,000	211,000	
2021	584,000	585,000	584,000	169,000	54,000	223,000	
2031	652,000	655,000	643,000	197,000	61,000	258,000	
2041	733,000	742,000	713,000	228,000	67,000	295,000	
2051	823,000	846,000	794,000	258,000	74,000	332,000	
2016-51 Growth	271,000	294,000	242,000	99,000	22,000	121,000	



Year	Employment			Employment By Type				
	Reference	High	Low	Major Office	Pop-Related	Emp. Land	Rural	Total
2011	217,000	217,000	217,000	15,000	102,000	89,000	11,000	217,000
2016	229,000	229,000	229,000	32,000	125,000	62,000	11,000	230,000
2021	238,000	238,000	238,000	33,000	130,000	64,000	11,000	238,000
2031	271,000	272,000	266,000	40,000	135,000	84,000	11,000	270,000
2041	310,000	314,000	301,000	49,000	148,000	101,000	11,000	309,000
2051	357,000	368,000	343,000	63,000	168,000	114,000	11,000	356,000
2016-51 Growth	128,000	139,000	114,000	31,000	43,000	52,000	-	126,000

1. The housing forecast does not replicate/predict the housing mix that would be determined through each municipality's APTG conformity work. Planned housing mixes will continue to be decided by municipalities through their local planning processes.
2. Apartments comprise all apartment buildings, whether greater than or less than 5 storeys. All other housing units are ground-related.

SOURCE: Hemson, June 16, 2020, Greater Golden Horseshoe: Growth Forecasts to 2051.

It should be noted that the PPU in new detached and semi-detached houses has risen dramatically over the last 30 years (see Figure A 1 in Appendix A), along with the average household size of detached units (see Figure 4-14). If this trend continues, it will have a large impact on the number of ground-related units required and will reduce the overall land need. The average of 3.5 Persons Per Unit on urban expansion lands assumed by urbanMetrics in this report reflects this trend. As shown in Figure 3-4, using this higher PPU factor in the previous Land needs analysis conducted by Lorius for the City of Hamilton would significantly reduce the unit shortfall, though not enough to eliminate the shortfall of ground-related units. It should be noted that the higher PPUs are likely the result of the increasing average size of new detached homes over time.

Figure 3-4: Impact of Increasing Low-Density PPUs on 2021 Land Needs Analysis

	Ground-Related (Constant PPUs)	Ground-Related (Constant Unit Count)	ADUs	Apartments	Total
Scenario 1: Current Trends					
Units	49,105	71,050	2,800	36,520	110,320
PPU	3.368	2.328	1.796	1.796	2.139
Population	165,392	165,392	5,028	65,580	236,000
Unit Shortfall Within Built Boundary	-25,825	-49,530	n.a.	n.a.	n.a.
Scenario 2: Growth Plan Minimum					
Units	45,181	62,880	3,030	44,400	110,320
PPU	3.338	2.399	1.796	1.796	2.139
Population	150,829	150,829	5,441	79,730	236,000
Unit Shortfall Within Built Boundary	-21,461	-39,160	n.a.	n.a.	n.a.
Scenario 3: Increased Targets					
Units	43,239	58,800	3,170	48,350	110,320
PPU	3.338	2.440	1.796	1.796	2.139
Population	143,484	143,484	5,692	86,823	236,000
Unit Shortfall Within Built Boundary	-18,409	-33,970	n.a.	n.a.	n.a.
Scenario 4: Ambitious Density					
Units	41,403	54,720	3,310	52,290	110,320
PPU	3.338	2.488	1.796	1.796	2.139
Population	136,158	136,158	5,944	93,898	236,000
Unit Shortfall Within Built Boundary	-15,473	-28,790	n.a.	n.a.	n.a.

SOURCE: urbanMetrics Inc., based on the land needs analysis in 2021 City of Hamilton Land Needs Assessment to 2051: Technical Working Paper – Summary of Results, and PPUs from 2023 Development Charges Background Study: City of Hamilton.

3.3 City of Hamilton Housing Pledge

On October 25, 2022 the Minister of Municipal Affairs and Housing assigned the City of Hamiton a Municipal Housing Target of 47,000 new homes by 2031, and requested that the City of Hamilton develop a Municipal Housing Pledge in support

of this target. The Municipal Housing Targets are part of the Province's goal of building 1.5 million new homes across Ontario by 2031, to meet the demand for housing. In the February 22, 2023, City of Hamilton council meeting the City agreed to the housing pledge, along with a number of initiatives to meet this target. The Municipal Housing Target is measured as the sum of CMHC housing starts, CMHC conversions and demolitions, and net new or renovated long-term care beds. As a result, this does not directly measure the actual increase in housing supply, as not all units that start end up completing and long-term care beds are not typically counted as dwelling units (e.g. in the census).

The progress of each municipality as well as annual targets are listed on the *tracking housing supply progress* website on the Government of Ontario's website. As shown in Figure 3-5, the annual targets set by the Province are well below the 4,700 average units required across the entire 10-year period to 2031. The City of Hamilton exceeded the provincial target in 2023, but as of the end of October 2024 had only achieved 42% of the provincial 2024 target. As a result of exceeding the 2023 target the City of Hamilton received $17.5 million from the Province's *Building Faster Fund*. The City of Hamilton has never reached the required 4,700 new units a year level needed to meet the 10-year target.

Figure 3-5: Annual City of Hamilton Housing Pledge Progress

Period	Annual Housing Target	Annual Progress	Progress %
2022	n.a.	3,670	n.a
2023	3,447	4,142	120%
YTD September 2024	3,917	1,632	42%

SOURCE: urbanMetrics Inc., with data from the Government of Ontario *Tracking housing supply progress* online housing tracker.

As a consequence of adding significantly less than 4,700 new units over the last three years, Hamilton will need to add an average of 5,287 new units for the next seven years (see Figure 3-6). In total, Hamilton will need to add 37,556 new units between November 2024 and the end of 2031. While there are approximately 43,700 dwelling units under application in the City of Hamilton currently (see Section 4.4), 2024 has seen the largest single-year decline in housing starts in Hamilton on record (see Figure 4-7). This is in part the result of broader trends in the housing market, as the Toronto CMA has also seen a large downturn in housing starts in 2024, however the City of Hamilton has experienced a much larger relative

decline. This suggests that Hamilton may be especially vulnerable to the current market conditions, and that a significant portion of units in its the pipeline are likely to be delayed until market conditions improve. This is likely to further increase the rate at which dwelling units must be completed.

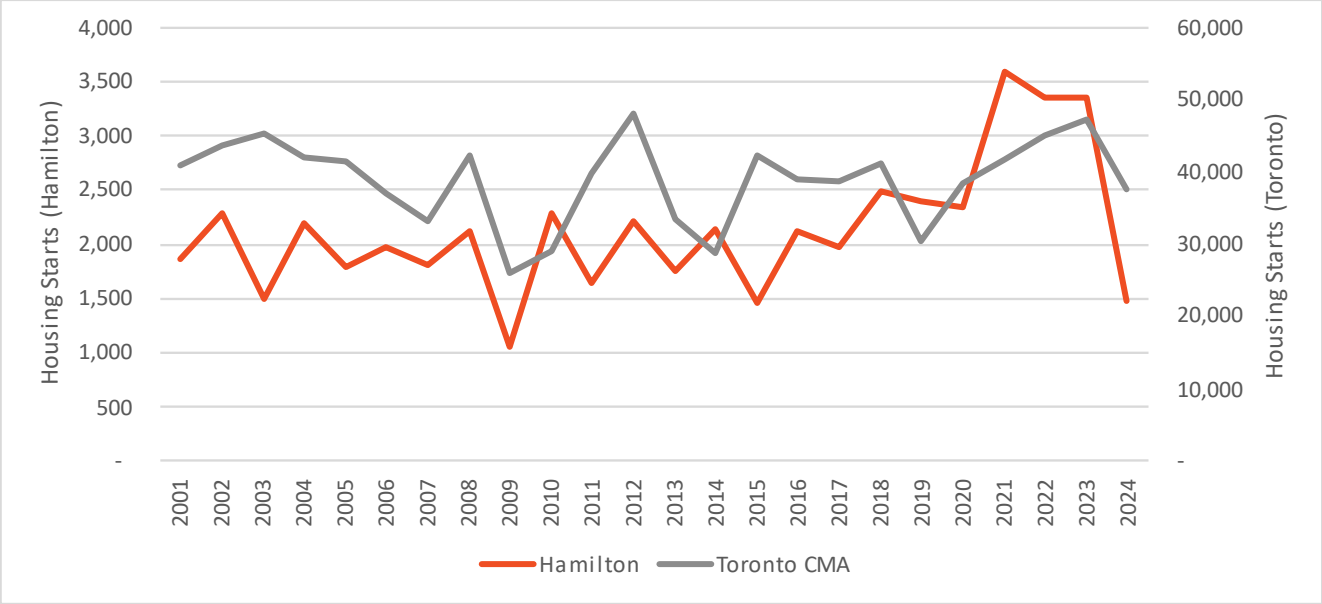
As development applications often take years to receive approval and many applications and approvals do not convert into starts, the City will likely need far more units in the development pipeline than the 37,691 units remaining in their Housing Pledge. In line with this, the White Church Urban Expansion Area will support the City's Housing Pledge target by providing the opportunity for a large number of new housing starts.

Figure 3-6: City of Hamilton New Housing Units Needed to Meet Housing Pledge Target

Period	Average Cumulative New Units	Actual Cumulative New Units	Annual New Units
2022	4,700	3,670	3,670
2023	9,400	7,812	4,142
January 2024 - October 2024	13,317	9,444	1,632
November 2024 - December 2024	14,100	9,988	544
2025	18,800	15,275	5,287
2026	23,500	20,563	5,287
2027	28,200	25,850	5,287
2028	32,900	31,138	5,287
2029	37,600	36,425	5,287
2030	42,300	41,713	5,287
2031	47,000	47,000	5,287

SOURCE: urbanMetrics Inc., with data from the Government of Ontario *Tracking housing supply progress* online housing tracker.
NOTE: 2024 October to December annual new units is estimated assuming the same rate of completions for the last three months of 2024 as the first nine months.

Figure 3-7: City of Hamilton and Toronto CMA Housing Starts



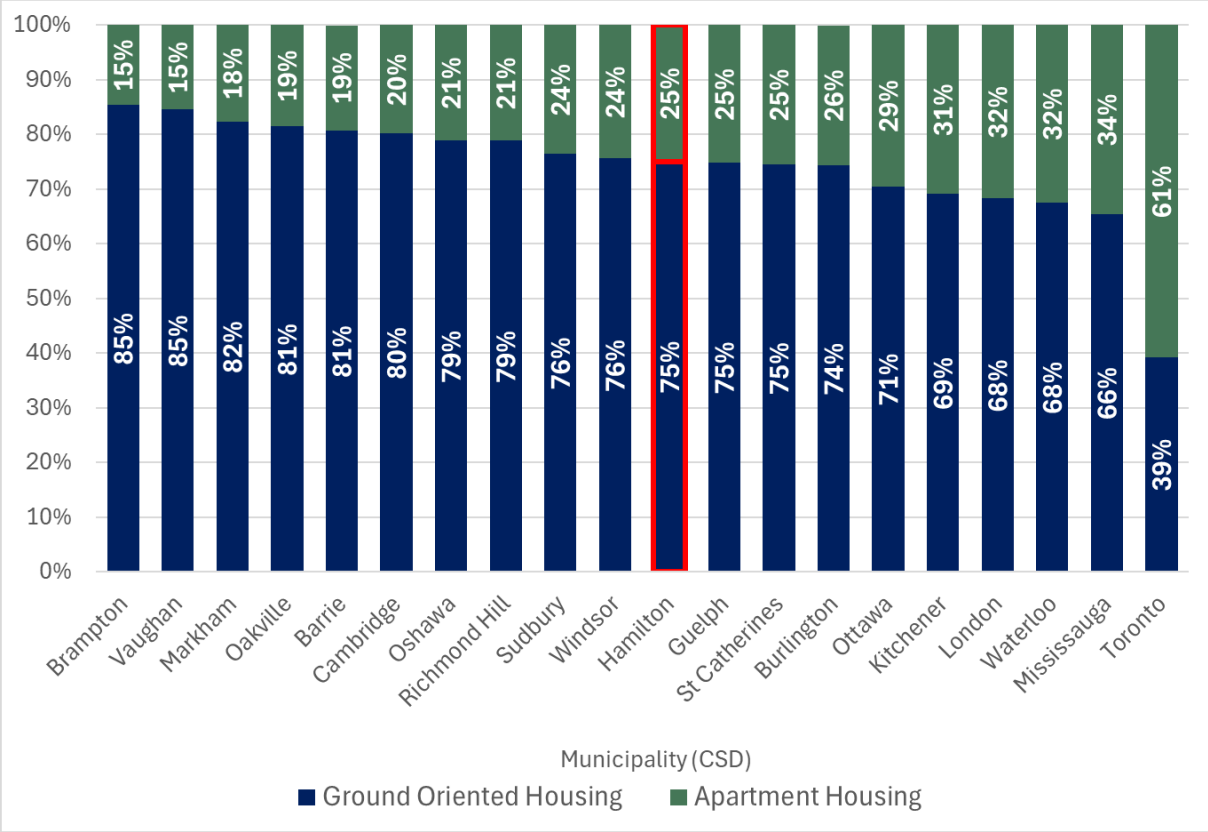
SOURCE: urbanMetrics Inc., based on CMHC Housing Starts (Actual) data. The 2024 YTD period is up to and including October 2024.

4.0 Land Needs Assessment

4.1 Existing Unit Mix Municipal Comparison

To contextualize the future housing needs of Hamilton, the typical distribution of housing types across the 20 most populous lower- and single-tier in Ontario are illustrated in Figure 4-1. Apartment housing consists of both buildings with five or more stories and buildings with fewer than five stories, but not apartments in a flat or duplex. Ground-oriented housing includes all other dwelling types. This provided a benchmark for comparing Hamilton's current and future housing distribution to that of other comparable municipalities. These findings show that 75% of all housing in Hamilton is currently ground-oriented, while only 25% consists of apartments. Hamilton has an "average" housing distribution mix and is placed 11th out of 20 in terms of the share of residential units that are apartment units. As shown, the City of Toronto stands out with almost double the percentage share of apartment units as the next highest municipality. This suggests that achieving a much higher than current apartment unit in Hamilton share is likely to be highly challenging. In particular, the City of Toronto forms the core of the larger metro area (the Toronto CMA), and as a result demand for ground-oriented housing has likely been pushed into surrounding municipalities. In contrast, Burlington and Grimsby are the only other municipalities within the Hamilton CMA, and as a result Hamilton cannot push the demand for ground-related housing into surrounding municipalities by restricting supply.

Figure 4-1: Housing Distribution by Type for Ontario's top 20 Largest Census Subdivisions

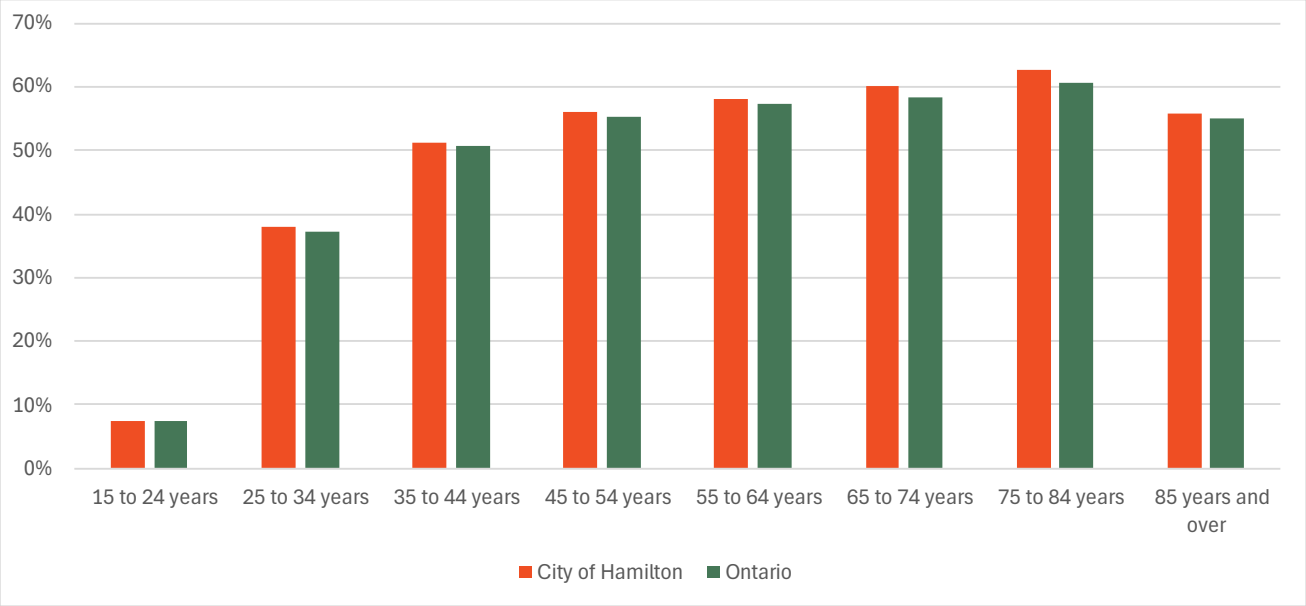


SOURCE: urbanMetrics Inc., with data from Statistics Canada, 2021 Census of Population.

4.2 Headship Rates and Age Cohorts

Figure 4-2 presents the headship rates for Hamilton, and Ontario, broken down into 10-year age cohorts starting with the 15–24 year-old group. These rates indicate the percentage of individuals within each cohort who are the primary household maintainer, known as the headship rate. The city of Hamilton consistently shows the highest headship rate across all age cohorts compared to Ontario. A higher headship rate indicates a smaller average household size. This figure also highlights the rapid increase in household maintainers, rising from less than 10% of 15–24-year-olds to over half of individuals aged 35 and older.

Figure 4-2: Headship Rates for the City Hamilton and Ontario



SOURCE: urbanMetrics Inc., with data from Statistics Canada, 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released February 8, 2023.

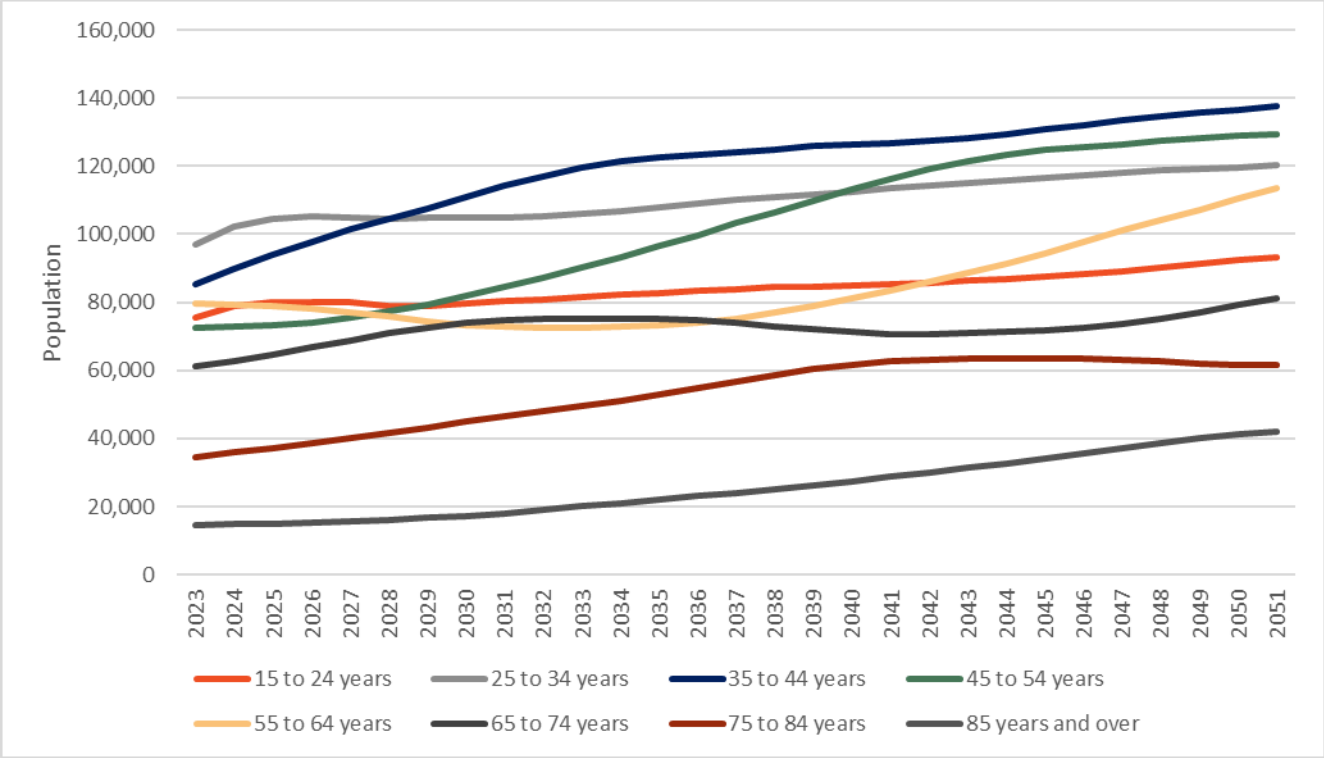
Figure 4-3 illustrates the headship rate of primary household maintainers in different age cohorts in apartments and ground related dwellings. In both Hamilton and Ontario the headship rate for ground-related dwellings rises rapidly with age between 15 and 44 years of age, with only slight declines after 64 years of age. Hamilton and Ontario both have similar headship rate trends among apartment dwellings, rising slightly in the 24 to 35 age cohort before declining but rising again in the 65+ age groups. This indicates that the Hamilton headship rates are in line with broader provincial trends, and that significant changes from these rates will require preventing households, in particular families with children, from occupying their preferred housing types.

Figure 4-3: Headship Rate by Dwelling Type and Age Cohort

SOURCE: urbanMetrics Inc., with data from Statistics Canada, 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released February 8 2023.

The Ministry of Finance provides Hamilton population projections by age cohort, as shown in Figure 4-4. As can be seen, the number of residents aged 25 to 44 is expected to rise rapidly through 2033 as a result of the large Millennial generation aging into this cohort. As previously mentioned, the transition between the 25 to 34 and 35 to 44 age cohorts is associated with a large increase in the household formation rates in ground-related dwellings. As a result, the demand for ground-related dwellings is expected to rise steadily over the next 10 years, with demand for this type of housing sustained out to well beyond 2051.

Figure 4-4: Ministry of Finance Population Projection by Age Cohort, City of Hamilton



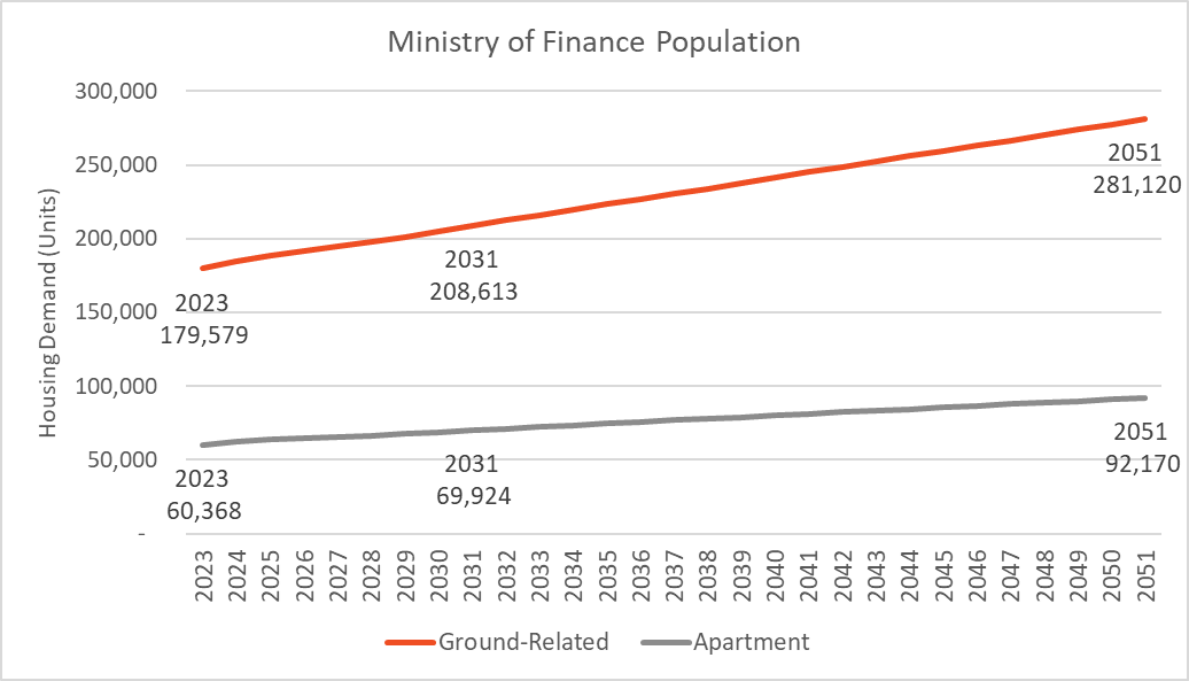
SOURCE: urbanMetrics Inc., with data from Ministry of Finance Population Projections (2024).

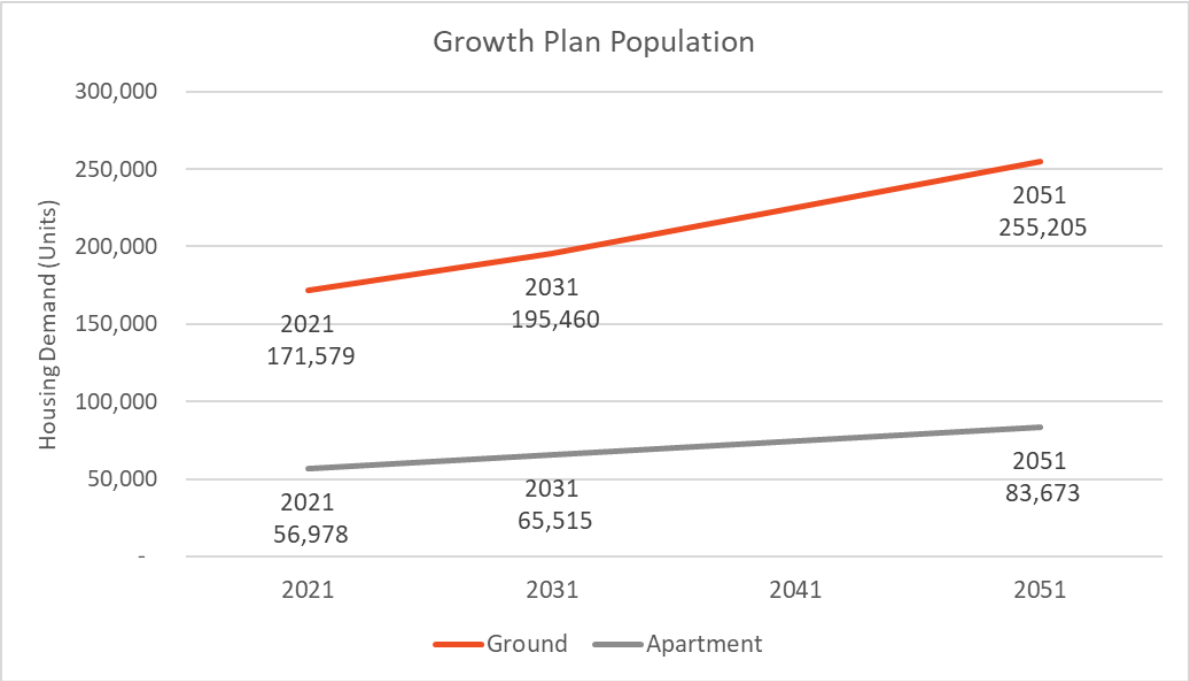
4.3 Housing Demand Forecast

By applying the headship rates in Figure 4-3 to the Ministry of Finance population projection by age cohort in Figure 4-4, the demand for specific types of housing can be forecast. The same can be done using the Growth Plan population forecast from the Urban Hamilton Official Plan (UHOP), using the age distribution from the Ministry of Finance population projection. As shown in Figure 4-5, while the demand for both ground related and apartment units is expected to rise steadily out to 2051 in both scenarios as a result of population growth, the demand for ground-related housing is expected to rise much more rapidly. By 2051 the City of Hamilton is expected to have a total demand for approximately 281,200 ground-related units and 92,200 apartment units under the Ministry of Finance population projection, and 225,200 ground related units and 83,700 apartment units under the Growth plan population forecast This represents an increased need for 101,500 new ground-related units and 31,800 apartment units under the Ministry of Finance

population projection. These models assumes that housing preferences remain the same.

Figure 4-5: Housing Demand Forecast by Housing Type to 2051, based on City of Hamilton Headship Rates





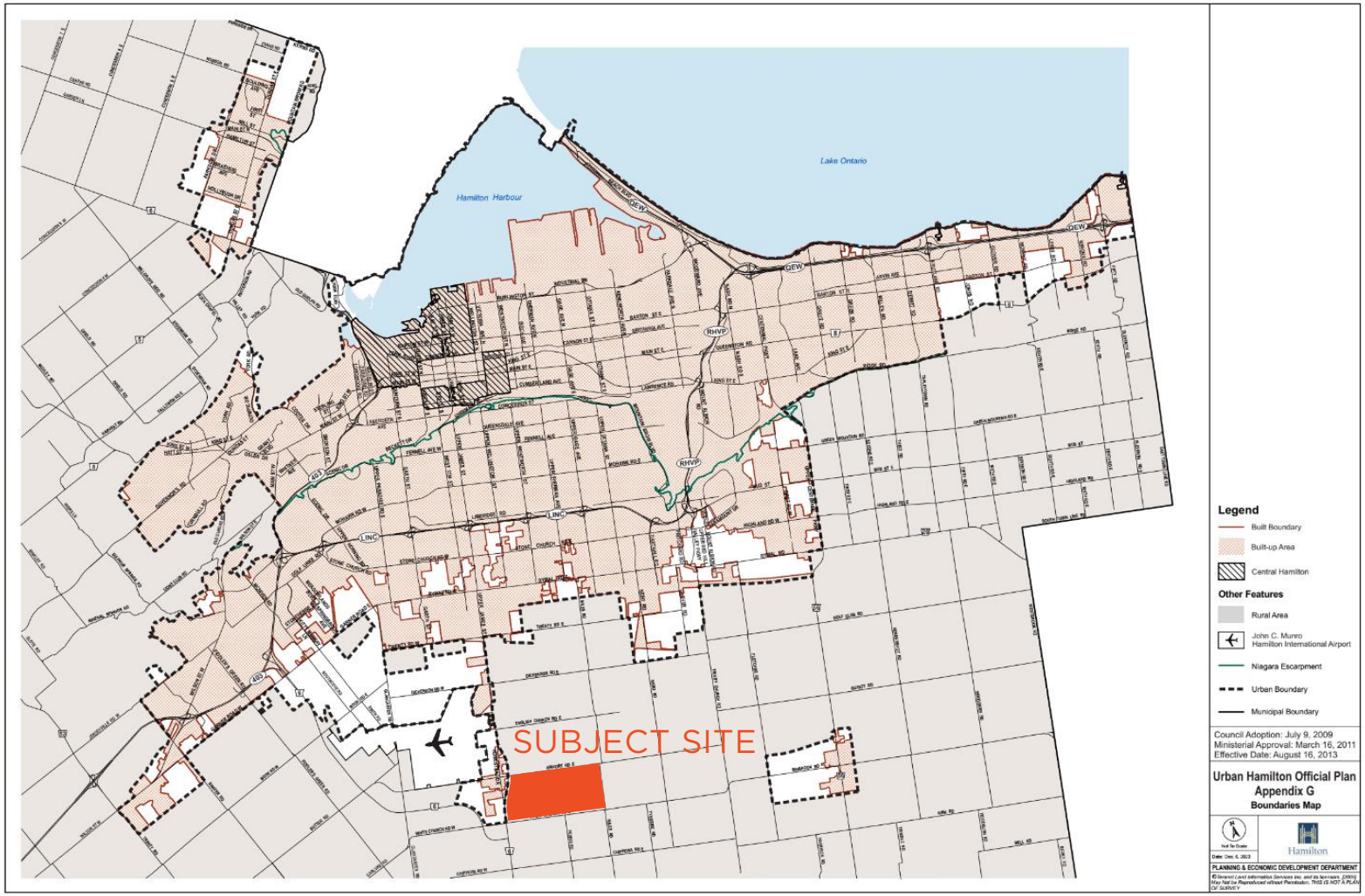
SOURCE: urbanMetrics Inc., with headship rates from Statistics Canada, 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released February 8 2023. Population projections from Ministry of Finance Population Projections (2024) and Growth Plan population forecasts from the Urban Hamilton Official Plan. Ministry of Finance Age Structure applied to Urban Hamilton Growth Plan population forecasts.

4.4 Housing Supply Potential

The housing supply potential measures the capacity of the vacant Designated Greenfield Area (DGA) in addition to the intensification and redevelopment that is likely to take place within the Built-Up Area to supply housing to meet future demand. As apartment and ground-related dwellings have very different demands between age cohorts, the supply potential must also be identified by housing types.

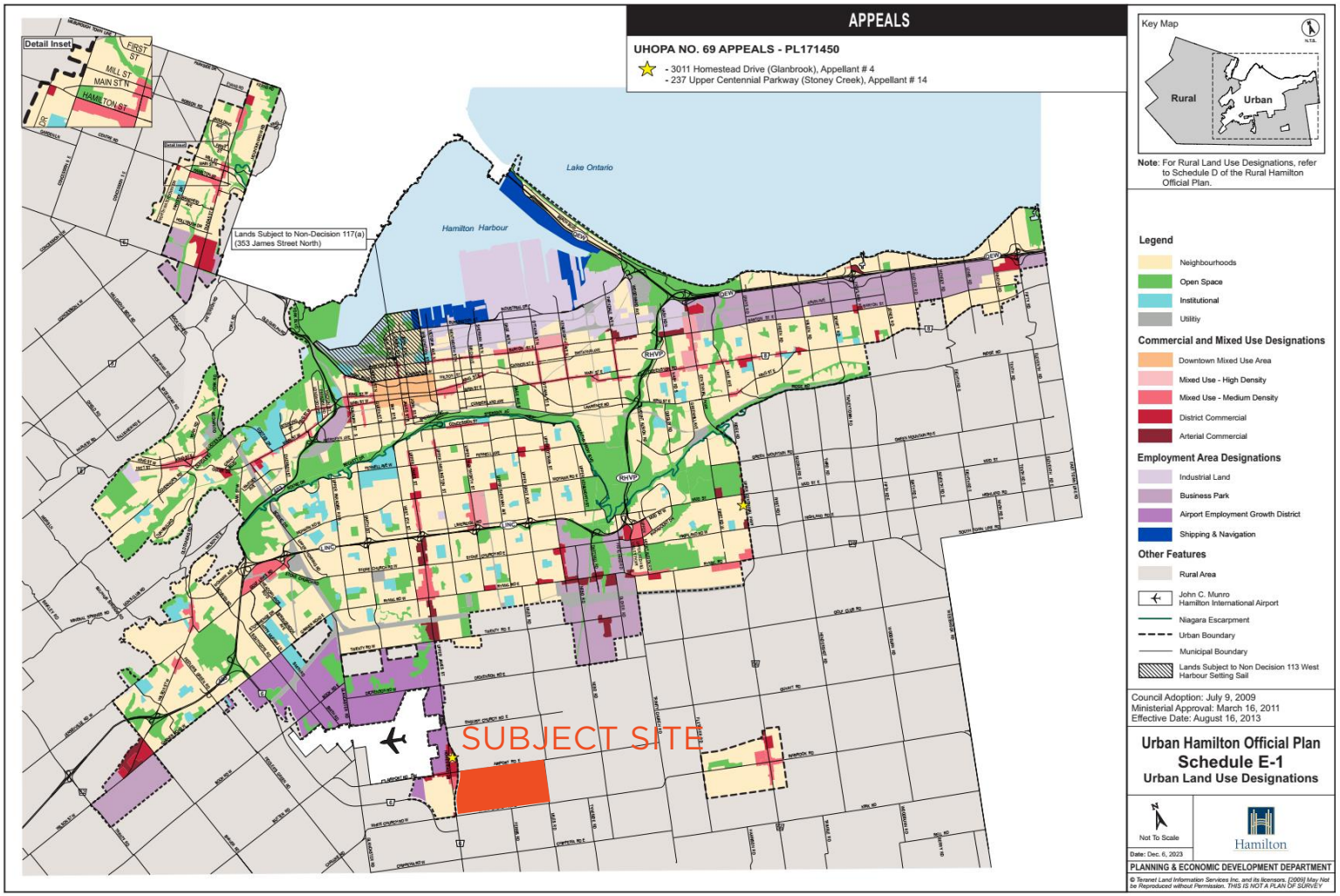
The Designated Greenfield Area (DGA) is made up of lands within the Urban Boundary that are not within the Built-up Area, shown in white in Figure 4-6. As shown in Figure 4-7, the lands within the DGA have a range of land use designations, and not all lands within the DGA are designated for residential uses.

Figure 4-6: Urban Hamilton Official Plan Appendix G - Boundaries Map



SOURCE: City of Hamilton, Urban Hamilton Official Plan Appendix G - Boundaries Map. Subject Site Identification by urbanMetrics Inc.

Figure 4-7: Urban Hamilton Official Plan Schedule E-1 - Urban Land Use Designations



SOURCE: City of Hamilton, Urban Hamilton Official Plan Appendix G - Boundaries Map. Subject Site Identification by urbanMetrics Inc.

Vacant Residential Land Supply

As required by Policy 3.5.1 of the Urban Hamilton Official Plan, the City is required to conduct annual monitoring and reporting on a number of measures related to the housing market and residential land supply. The *Market and Land Supply Monitoring Report 2023* was the first such report released and is based on 2023 year end data.[2] This report represents the most up-to date comprehensive report on the supply of residential land released by the City, and contains the amount of vacant residential land, the number of Additional Dwelling Units constructed, and the residential intensification rate as well as other information. As shown in Figure 4-8, as of the end of 2023 the City of Hamilton had 481 hectares (~1,190 acres) of vacant residential land, with a capacity to accommodate 39,174 dwelling units.

Figure 4-8: City of Hamilton Vacant Residential Land Supply, Year End 2023

Area	Units	Vacant Residential Land (hectares)
Outside Built Boundary		
Ancaster	951	29.0
Dundas	0	0.0
Flamborough	3,941	36.4
Glanbrook	2,975	71.7
Hamilton	2,739	73.2
Stoney Creek	8,977	148.5
Within Built Boundary		
Ancaster	499	11.6
Dundas	377	5.2
Flamborough	146	2.4
Glanbrook	432	10.4
Hamilton	13,490	50.6
Stoney Creek	4,647	42.0
City Wide	39,174	481

SOURCE: City of Hamilton, *Market and Land Supply Monitoring Report 2023*, Table 6.

To these 2023 totals urbanMetrics has added the development application information for 2024 year-to-date (YTD) to these baseline numbers, in order to

[2] As identified in the November 5, 2024, Information Report to the Planning Committee titled "Market and Land Supply Monitoring Report - 2023 and Interim 2024 Update (PED24110) (City Wide)".

estimate the vacant residential land supply as of November 2024. Only residential development applications within the Urban Boundary on visually identified vacant land were used for this update. In order to update the 2023 application numbers prepared by the City the following three components have been estimated:

- New Development Applications: development applications submitted in 2024 on land parcels without any prior development applications. This development application data is taken from the City of Hamilton Open Data Portal, and our manual review of each application using the City of Hamilton *Find Development Applications* interactive map.
- Prior Development Potential: it is our understanding that the City of Hamilton estimates the development potential of vacant lands without development applications. In order to avoid double counting the lands containing new development applications, the development potential of those lands must be subtracted. The development potential of each new development application parcel was calculated using the average units per hectare of "Potential Development" by community based on the City of Hamilton *Vacant Residential Land Area – 2023 Update (City Wide)* report dated October 17, 2023.
- Application Revisions: the number of units in development applications submitted in 2024 on parcels with existing development activity were compared with the most recent prior development application to identify any net changes in the proposed number of units.

As shown in Figure 4-9 overall there was a minor increase in the total number of units on vacant residential lands in Hamilton. This increase was almost entirely the result of an increase in the number of high-density units, with a very minor decrease in the number of medium density units.[3] Given the relatively small number of applications (10 new applications, and 19 development applications with revised unit counts), a significant amount of variability in unit density between development applications is expected. With this in mind, these results suggest the City of Hamilton's estimates for the development potential of vacant residential land without development applications is accurate, but there exists the potential to increase density through the replacement of low-density and medium density units with high-density units.

[3] Low-density units includes detached and semi-detached units, while medium density units includes townhouses. High-density units include apartments.

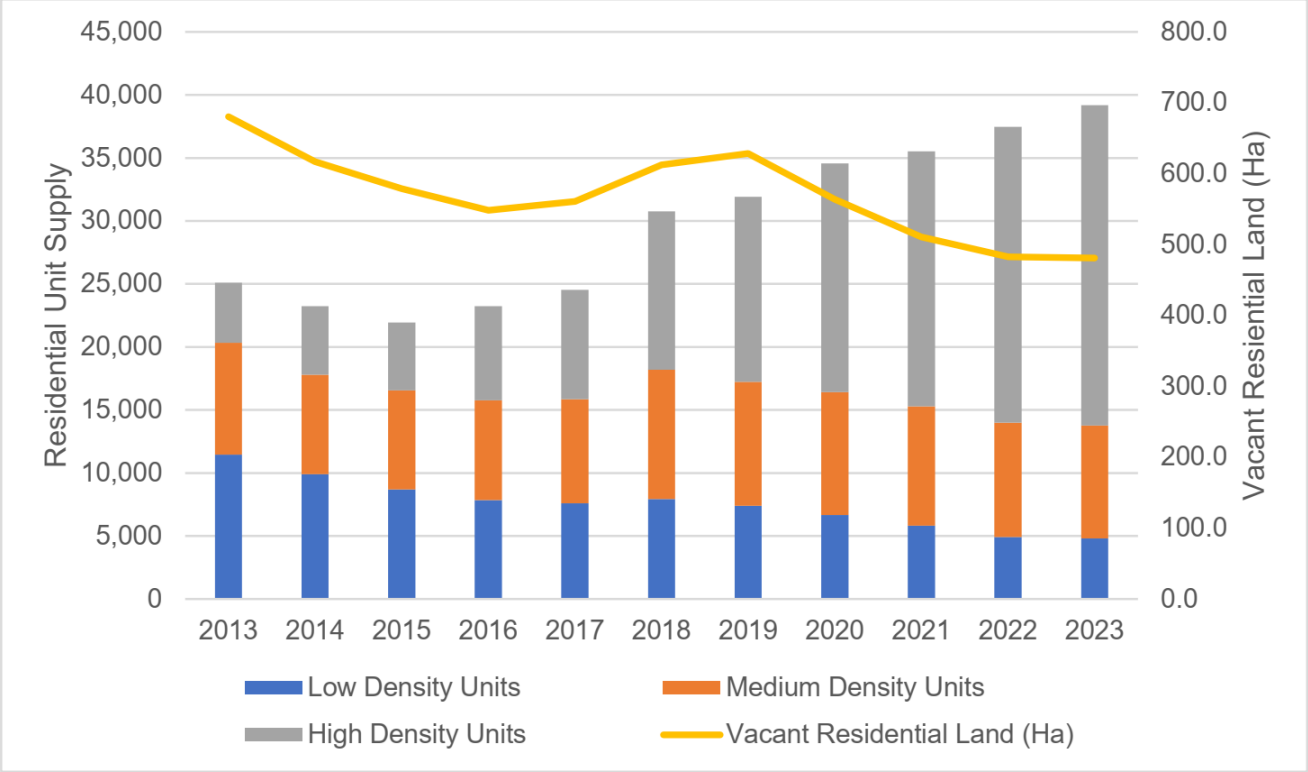
Figure 4-9: Change in City of Hamilton Vacant Residential Land Units, Year-To-Date 2024

Location	Component	Low Density	Medium Density	High Density	Total
Outside Built Boundary (DGA)	New Applications (Units)	6	335	150	491
	Prior Potential Development (Units)	-4	-449	-105	-558
	Application Revisions (Units)	4	7	178	189
	Total Units	**6**	**-107**	**223**	**122**
Within Built Boundary	New Applications (Units)	0	5	446	451
	Prior Potential Development (Units)	0	-4	-284	-288
	Application Revisions (Units)	1	78	210	289
	Total Units	**1**	**79**	**372**	**452**
	City-Wide Units	**7**	**-28**	**595**	**574**

SOURCE: urbanMetrics Inc., with development application data from the City of Hamilton Open Data Portal, and City of Hamilton *Find Development Applications* web mapping service, and *Vacant Residential Land Area – 2023 Update (City Wide)* report dated October 17, 2023.

The above trend with an increasing number of high-density units and the static or decreasing numbers of low-density and medium density units is consistent with the findings of the City of Hamilton's *Market and Land Supply Monitoring Report 2023*. This report found that since 2019 the amount of vacant residential land has been generally decreasing, while at the same time the total number of units on these lands has increased (see Figure 4-10). As stated in that report, "this can be attributed to the amendments to the Urban Hamilton Official Plan and Zoning By-law to expand and increase residential land use permissions" (p. 31), which resulted in an increasing number of apartment units. This trend was to be expected, as the increased density of high-density units can easily be approved, while the density of low-density and medium-density units can only be increased by reducing setbacks, unit sizes, and supporting non-residential uses like road widths and parking. This means that the remaining land supply is not a significant physical barrier to creating additional apartment units but can be for the approval of lower density units.

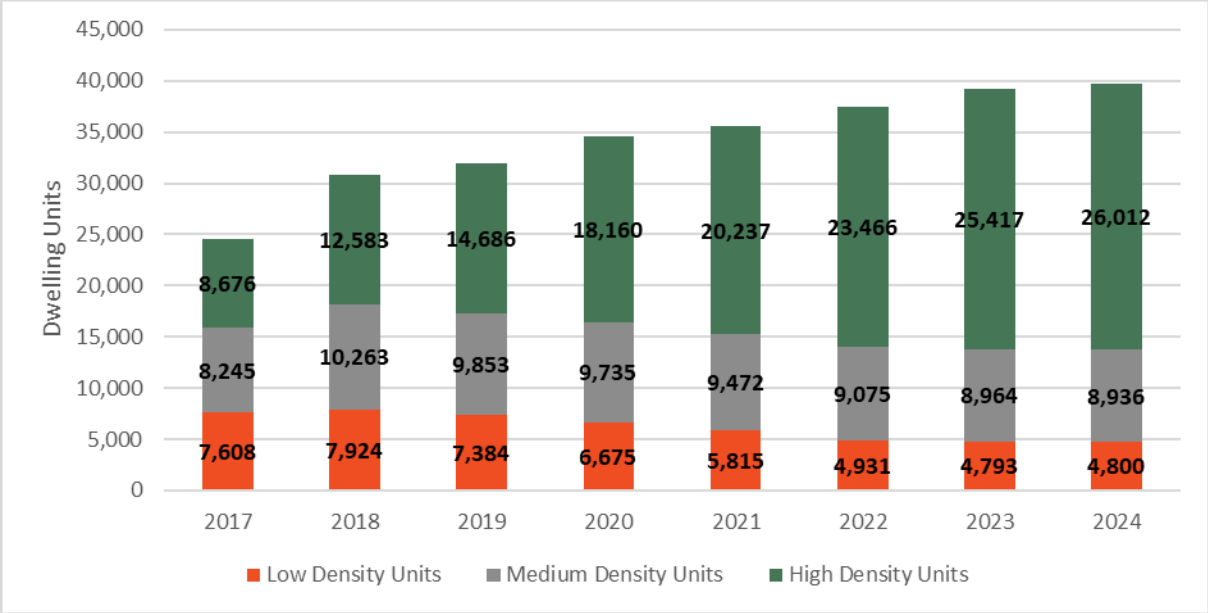
Figure 4-10: City of Hamilton Vacant Residential Lands and Projected Dwellings



SOURCE: City of Hamilton, *Market and Land Supply Monitoring Report 2023*, Figure 17.

The change in the capacity of vacant residential lands in terms of units by type of dwelling is shown in Figure 4-11, which shows a significant decline in ground-related units and a rise in apartment units. Specifically, the number of low-density units proposed or in potential development on vacant residential lands has declined by over 2,500 units between 2019 and 2024, while the number of medium-density units has declined by over 900 units over that time period. At the same time, there has been an increase of over 11,300 high-density units proposed or in potential development over this same period. Of note, the growth of units on vacant residential lands in 2024 slowed significantly compared to previous years. It is unclear if this reflects more challenging residential market conditions, the lack of available sites for potential density increases, or other factors entirely.

Figure 4-11: City of Hamilton Vacant Residential Land Unit Supply by Type of Dwelling



SOURCE: urbanMetrics Inc., with data for the years 2017-2023 from City of Hamilton, *Market and Land Supply Monitoring Report 2023*, Table 7. Data for 2024 based on adjustments to 2023 numbers using City of Hamilton development application data.

Additional Dwelling Units (ADUs)

Additional Dwelling Units (ADUs) are self-contained dwelling units that are accessory to and located on the same lot as the principal dwelling. This type of unit is also commonly called an Accessory Dwelling Unit, Secondary Dwelling Unit, or Secondary Suite. As identified in the June 2021 CMHC Housing Market Insight – Ontario report, in 2019 the City of Hamilton had the 5th lowest percentage of ground-related properties with an ADU out of the 28 most populous municipalities in Ontario, at just 3.1% (see figure C 1 in Appendix C). In total, Hamilton had an estimated 4,687 ADUs as of 2019, of which 40% were basement apartments.

In May 2021 the City of Hamilton amended its zoning By-laws to permit ADUs in Hamilton in single-detached, duplex, semi-detached, and townhouse dwellings. As shown in Figure 4-12, the number of building permits issued for ADUs in Hamilton has increased significantly from 170 in 2020 to 538 in 2023. This suggests that this policy change has had a significant impact on the rate of ADU construction. Assuming there were no demolitions or deconversions, based on the CMHC Housing Market Insight report and the City of Hamilton data by the end of 2023 there were an estimated 5,970 ADUs in Hamilton. It is currently unknown to

whether this trend of increasing ADU's will continue into the future, however it is likely that a portion of this increase is the result of the legalization of existing ADUs and pent-up demand. A future decline is supported by Appendix C of the City of Hamilton's *Market and Land Supply Monitoring Report - 2023 and Interim 2024 Update (PED24110)*, which showed that the number of ADUs in the first six months of 2024 was approximately half what it was in the first six months of 2023. This decline is slightly greater than the decline in housing starts over this period, suggesting that a tougher housing market is not the sole cause of the decline.

As identified in section 5.1.3 of the City of Hamilton's *Market and Land Supply Monitoring Report 2023* the city is projecting an average of 760 new ADUs per year for the next 15 years. While the majority of ADUs were in established stable neighbourhoods, some relatively new neighbourhoods had clusters of new ADUs (see Figure C 2 in Appendix C).

Figure 4-12: Additional Dwelling Unit Building Permits, City of Hamilton

Dwelling Type	2019	2020	2021	2022	2023
ADU (new construction)				3	17
ADU (conversion)	151	169	212	343	459
ADU – Detached (new construction)			1	7	34
ADU – Detached (conversion)	1	1	1	8	28
Total	**152**	**170**	**214**	**361**	**538**

SOURCE: City of Hamilton, Market and Land Supply Monitoring Report 2023, Table 1. Data from City of Hamilton building permits.

The March 2021 *City of Hamilton Land Needs Assessment to 2051* projected a growth of 3,310 ADUs between 2021- and 2051 in the *Ambitious Density* scenario, which is an average of 110 units per year. This was consistent with the percent of dwelling units that were ADUs in 2019, as identified in the CMHC *Housing Market Insight – Ontario – Secondary Suites in Ontario* report. However, if the 2023 rate of ADU construction continues until 2051 approximately 15,000 new ADUs would be built, and if the City's projected rate of 760 is reached an additional 21,000 ADUs would be built (see Figure 4-13). The City of Hamilton has taken many steps to address common barriers to successful ADU programs, such as creating a dedicated ADU team to review building permits, parking space exemptions for ADUs, with increasing ADU permissions in 2022 and again 2024. Despite these efforts, in our opinion the rate of ADU growth projected by the City is very aggressive, even with continued support and policy revisions from the City. While

urbanMetrics has used the 2023 rate of ADU completions in our analysis, over the long-term this is also an optimistic assumption given the large drop in ADUs in the first half of 2024 as 9identified by City data.

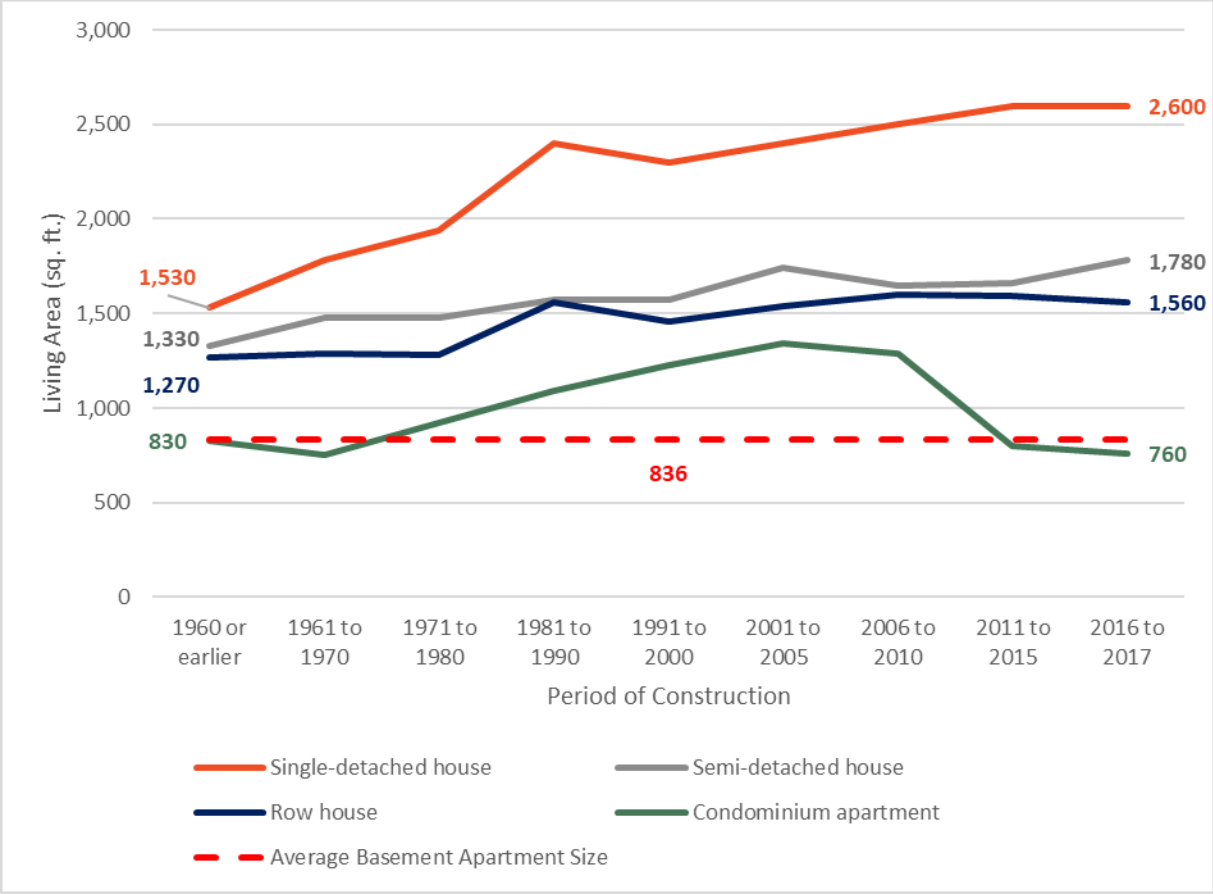
Figure 4-13: City of Hamilton ADU Growth Forecast

Period	Scenario	New ADUs	ADUs Per Year	Total ADUs
October 2021 to Year End 2051	Current Rate	14,600	538	21,000
October 2021 to Year End 2051	City's Forecast Rate	20,600	760	27,300
October 2021 to Year End 2031	Current Rate	3,900	538	10,300
October 2021 to Year End 2031	City's Forecast Rate	5,400	760	12,100

SOURCE: urbanMetrics Inc. Based on data from City of Hamilton, *Market and Land Supply Monitoring Report 2023*, and CMHC *Housing Market Insight – Ontario – Secondary Suites in Ontario*.

Given the much higher number of ADUs than was initially contemplated in the City of Hamilton's 2021 LNA, it is important to identify what segment of the housing market ADUs will serve. As shown in Figure 4-14, the average size of a basement apartment in Hamilton is almost the same size as a condominium apartment, at approximately half the size of a row house. While the gap in average unit size is larger among more recently built units, even among units built before 1960 the average apartment is only 65% the size of a row house. As identified in the June 2021 CMHC *Housing Market Insight – Ontario* report, the average basement apartment in Hamilton was only 836 square feet based on 2019 data. Consistent with this, an ADU in an accessory building has a maximum GFA of 75 square metres (807 square feet) per section 4.33.2.i) of the City of Hamilton Zoning By-law 05-200, and therefore larger unit sizes cannot be built. As a result, ADUs of any type significantly larger than 800 square feet are very unlikely, due to both the primary dwelling buildings envelope size and zoning restrictions. ADUs in Hamilton do not generally offer significantly more space than a condominium apartment and likely provide an alternative to apartment units. Residents who choose grade-related housing as a result of a need for additional space, such as families with children, are likely to continue to have a strong preference for traditional types of grade-related housing. In addition the need for ground-related housing is unlikely to be entirely met by ADUs. This is not meant to suggest that ADUs do not provide an important housing typology, distinct from both apartments and traditional ground related units, but instead that ADUs are unlikely to be able to completely fulfill the need for ground-related housing.

Figure 4-14: Average Living Area by Dwelling Type and Period of Construction in Hamilton, 2018



SOURCE: urbanMetrics, with data from Statistics Canada. Table 46-10-0028-01 Living area and assessment value per square foot of residential properties by property type and period of construction, provinces of Nova Scotia, Ontario and British Columbia. Average Basement Apartment Size from June 2021 CMHC *Housing Market Insight – Ontario*.

4.5 Overall Land Needs

To project the overall future land needs required to accommodate population growth, multiple population projection scenarios were analyzed. These scenarios utilized both the Ministry of Finance Population Projections and the Growth Plan Population Projections for the City of Hamilton. The overall land needs were projected at 2031 to align with the 10-year targets, as well as 2051 to align with the Growth Plan and new PPS 2024 planning horizon. Under each projection scenario, Hamilton's headship rates and the propensity of each 10-year age cohort to occupy either ground-oriented or apartment-oriented housing types were considered. Of

note, the Additional Dwelling Units that are in a physically sperate building ("ADU - detached") from the primary dwelling unit were assumed to meet the demand for ground-related units, while ADUs within the same building as the primary dwelling unit were assumed to meet the expected demand for apartment units due to their small size, despite being located within a ground-related building.

Additionally, we have used a 50% intensification rate to reflect the now defunct Growth Plan intensification requirements, with the acknowledgment that this does not meet the market demand for housing. We have listed the resulting gap between market demand and the intensification rate as its own component for clarity.

2031 Land Needs

Figure 4-15 illustrates the City of Hamilton's (CSD) overall land needs analysis based on the population projections from the Ministry of Finance, and the Hamilton CSD headship rates also derived from Statistics Canada.

Figure 4-15: City of Hamilton Dwelling Unit Need in 2031, Ministry of Finance Population Projection and City of Hamilton Headship Rates

Unit Demand and Supply

Component	Ground Related	Apartments	Total
Existing Housing	170,800	59,900	230,800
2031 Housing Demand	200,200	67,100	267,400
2025-2032 Unit Growth	**29,400**	**7,200**	**36,600**
BUA Vacant Residential Land Capacity	2,700	21,300	23,900
BUA Market Growth	2,700	7,200	9,900
BUA Intensification Shift Required	0	8,400	8,400
BUA Growth	**2,700**	**15,600**	**18,300**
DGA Vacant Residential Land Capacity	11,500	8,200	19,700
DGA Market Growth	26,700	0	26,700
DGA Intensification Shift Required	-8,400	0	-8,400
DGA Growth	**18,300**	**0**	**18,300**

Land Needs

DGA Unit Shortfall	6,800
Intensification Rate	50%
2031 Population Outside Urban boundary	23,800
2031 Land Need (ha)	309

Source: urbanMetrics Inc.

Based on this scenario, Hamilton is projected to require approximately 21,000 additional ground-oriented residential units and 15,600 apartment units. All additional apartment units are assumed to be accommodated through intensification, as this type of development is not expected to be constrained by the land supply out to 2031. The 2031 residential unit projection is used to derive a total population projection by applying the average persons per unit (PPU) value of 3.5, derived from the White Church Urban Expansion Area concept plan. This population is then divided by the target density of 77 people and jobs per hectare to determine the gross hectares of land required. This calculation results in a final projected requirement of 309 gross hectares (~760 acres) of land outside of the urban boundary by 2031. This would require 8,400 households that want ground related housing to be housed in apartments in the Built-Up Area.

The same calculations for residential unit requirements and land needs were conducted using the Growth Plan population projections. The methodology is consistent with the approach outlined earlier. As shown in Figure 4-16 below, the Growth Plan population projections result in a need for 139 hectares (~340 acres) of additional land. This would require 7,200 households that want ground-related housing to be housed in apartments in the built-up area.

Figure 4-16: City of Hamilton Dwelling Unit Need in 2031, Growth Plan Population Forecast and City of Hamilton Headship Rates

Unit Demand and Supply

Component	Ground Relate	Apartments	Total
Existing Housing	170,800	59,900	230,800
2031 Housing Demand	195,300	64,600	259,900
2025-2032 Unit Growth	**24,400**	**4,700**	**29,100**
BUA Vacant Residential Land Capacity	2,700	21,300	23,900
BUA Market Growth	2,700	4,700	7,400
BUA Intensification Shift Required	0	7,200	7,200
BUA Growth	**2,700**	**11,900**	**14,600**
DGA Vacant Residential Land Capacity	11,500	8,200	19,700
DGA Market Growth	21,700	0	21,700
DGA Intensification Shift Required	-7,200	0	-7,200
DGA Growth	**14,600**	**0**	**14,600**

Land Needs

DGA Unit Shortfall	3,100
Intensification Rate	50%
2031 Population Outside Urban boundary	10,700
2031 Land Need (ha)	139

SOURCE: urbanMetrics Inc.

In both population projection scenarios, the City of Hamilton will require additional lands outside the current urban boundary to accommodate the projected population in the year 2031. It is important to note that this means that amount of land is needed to be built out in 2031, not just approved. Given the typical timelines to receive planning approval, carry out site preparation, and construct units, there is relatively little time left to meet even this relatively modest short-term demand

2051 Land Needs

Figure 4-17 illustrates the City of Hamilton's (CSD) overall land needs assessment based on the population projections from the Ministry of Finance, and the Hamilton CSD headship rates also derived from Statistics Canada.

Figure 4-17: City of Hamilton Dwelling Unit Need in 2051, Ministry of Finance Population Projection and City of Hamilton Headship Rates

Unit Demand and Supply

Component	Ground Related	Apartments	Total
Existing Housing	170,800	59,900	230,800
2031 Housing Demand	270,100	88,600	358,700
2025-2032 Unit Growth	**99,300**	**28,700**	**128,000**
BUA Vacant Residential Land Capacity	3,900	30,700	34,600
BUA Market Growth	3,900	28,700	32,600
BUA Intensification Shift Required	0	31,400	31,400
BUA Growth	**3,900**	**60,100**	**64,000**
DGA Vacant Residential Land Capacity	11,500	8,200	19,700
DGA Market Growth	95,400	0	95,400
DGA Intensification Shift Required	-31,400	0	-31,400
DGA Growth	**64,000**	**0**	**64,000**

Land Needs

DGA Unit Shortfall	52,500
Intensification Rate	50%
2031 Population Outside Urban boundary	183,700
2031 Land Need (ha)	2,386

Source: urbanMetrics Inc.

The figures highlighted in Figure 4-17 summarize our projection of the additional housing units needed by 2051 beyond the supply that is accounted for through intensification within the Urban Boundary, or within existing Designated Greenfield Areas. Based on this scenario, Hamilton is projected to require approximately 67,900 additional ground-oriented residential units, and 60,100 additional apartment units. All additional apartment units are assumed to be accommodated through intensification, in order to meet the intensification rate of 50%. As apartments can be built through redevelopment, this type of development is not expected to be constrained by the land supply out to 2051. These unit projections, are used to derive a total population projection by applying the average persons per unit (PPU) value of 3.5, derived from the White Church Urban Expansion Area concept plan. This population is then divided by the target density of 77 people and jobs per hectare to determine the gross hectares of land required. This calculation results in a final projected requirement of 2,386 gross hectares (~5,900 acres) of land outside of the urban boundary by 2051. This would require 31,400 households that want ground related housing to be housed in apartments in the Built-Up Area.

The same calculations for residential unit requirements and land needs were conducted using the Growth Plan population forecasts. The methodology is consistent with the approach outlined earlier. As shown in Figure 4-18 below the Growth Plan population projections result in a need for 1,930 hectares (~4,800 acres) of additional land. This would require 26,600 households that want ground-related housing to be housed in apartments in the built-up area.

Figure 4-18: City of Hamilton Dwelling Unit Need in 2051, Growth Plan Population Forecast and City of Hamilton Headship Rates

Unit Demand and Supply

Component	Ground Related	Apartments	Total
Existing Housing	170,800	59,900	230,800
2031 Housing Demand	255,300	83,400	338,700
2025-2032 Unit Growth	**84,500**	**23,400**	**107,900**
BUA Vacant Residential Land Capacity	3,900	30,700	34,600
BUA Market Growth	3,900	23,400	27,300
BUA Intensification Shift Required	0	26,600	26,600
BUA Growth	**3,900**	**50,000**	**53,900**
DGA Vacant Residential Land Capacity	11,500	8,200	19,700
DGA Market Growth	80,500	0	80,500
DGA Intensification Shift Required	-26,600	0	-26,600
DGA Growth	**53,900**	**0**	**53,900**

Land Needs

DGA Unit Shortfall	42,400
Intensification Rate	50%
2031 Population Outside Urban boundary	148,600
2031 Land Need (ha)	1,930

SOURCE: urbanMetrics Inc.

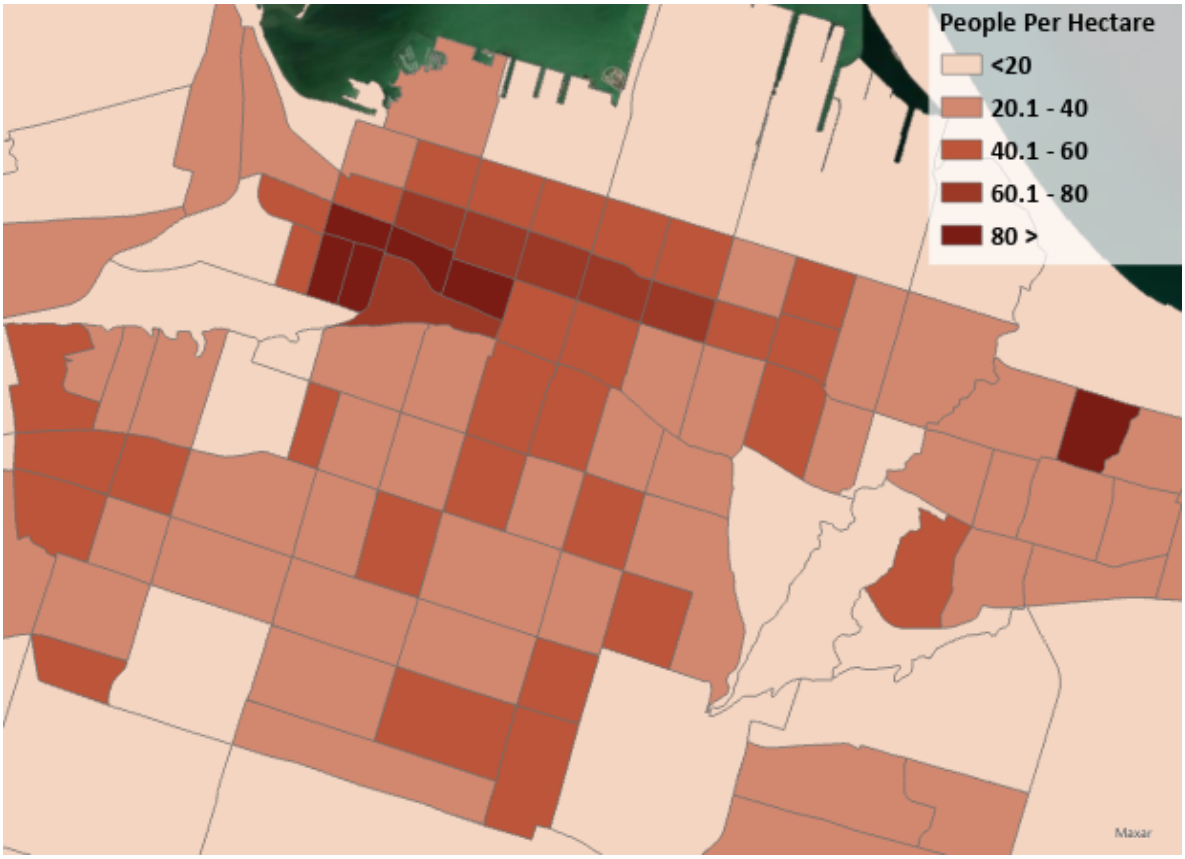
In both population scenarios, the City of Hamilton will require additional lands outside the current urban boundary to accommodate the expected population in the year 2051. It is important to note that this means that amount of land is needed to be built out in 2051, not just approved. Given the typical timelines to receive planning approval, carry out site preparation, and construct units, additional land should be made available well in advance of when completed units are required.

5.0 Whitechurch Expansion Area Density Target

The City of Hamilton urban expansion guideline requires that new urban expansion areas achieve a density of 77 people and jobs per hectare and has stated that achieving these targets may require innovative approaches. In order to identify the feasibility and built forms that will facilitate achieving this target, urbanMetrics has reviewed both the population density and unit mix of census tracts in Hamilton, as well as identified census tracts from across Ontario that have 77 people per hectare and are almost entirely ground-related housing. Of note the listed densities do not include jobs, and as a result are higher than what would be required to reach 77 people and jobs per hectare. Also, given the long-term trend for continued work-from home, residential areas now accommodate many more jobs than were previously contemplated in the growth plan.

In order to identify the existing densities in Hamilton, urbanMetrics has mapped the population density of all Census Tracts within the City of Hamilton, as shown in Figure 5-1. It should be noted that the density target of 77 people and jobs per hectare is a gross density. As shown, census tracts are generally denser closer to the downtown, with central areas exceeding 60 people per hectare and suburban neighborhoods falling below 40. The following map closely aligns with Figure D 1 in Appendix E, which shows the housing unit density patterns across City of Hamilton's census tracts.

Figure 5-1: Map of People per Hectare by Census Tract in Hamilton

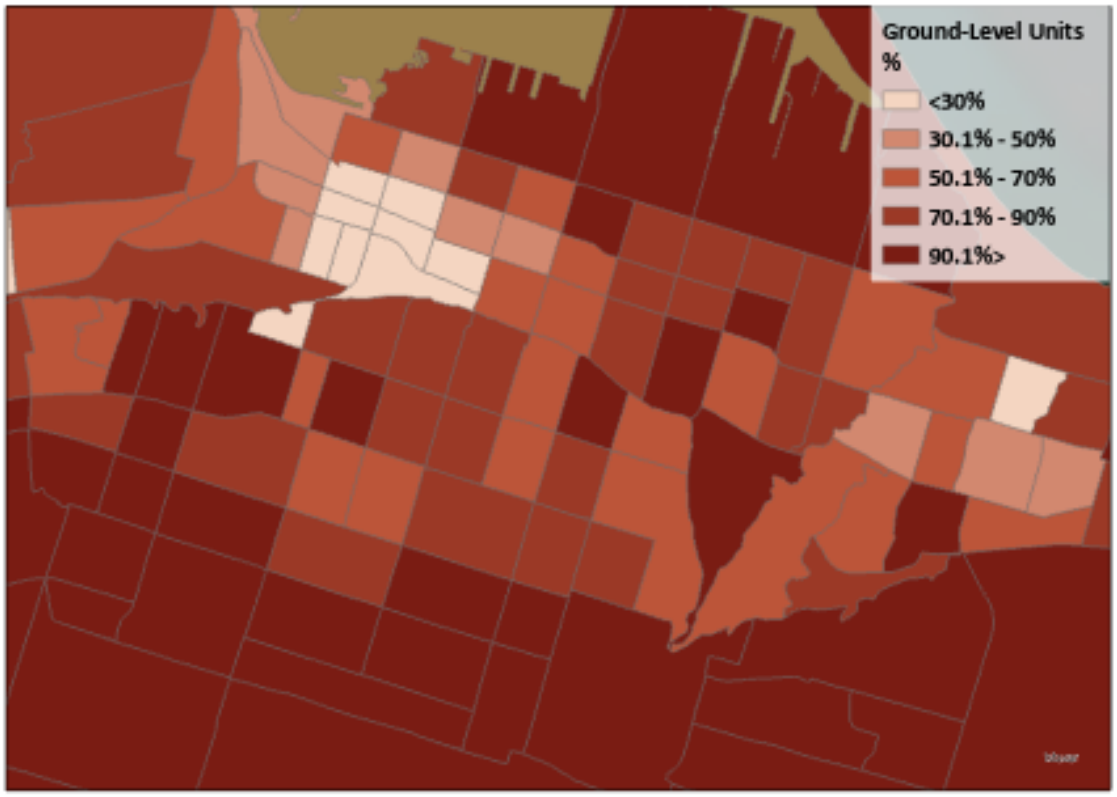


SOURCE: urbanMetrics Inc., with 2021 Census Profile data.

Figure 5-2 illustrates the percentage of ground-level housing across Hamilton's census tracts, including single-detached, semi-detached, row housing, and other low-rise units. Darker areas indicate neighborhoods where ground-level units exceed 90%, while lighter areas represent zones with a more diverse housing mix, where ground-level units make up less than 50%.

The map demonstrates that the majority of Hamilton's neighborhoods are composed predominantly of ground-level housing, particularly in suburban and outlying areas. Central areas, shown with lighter shades, reflect a more intensive mix of housing types. This widespread prevalence of ground-level housing is a defining characteristic of Hamilton's residential landscape.

Figure 5-2: Map of Percentage of Ground-Level Units by Census Tract in Hamilton



SOURCE: urbanMetrics Inc., with 2021 Census data.

In order to identify the built form and neighbourhood structure required to reach 77 people per hectare, urbanMetrics has searched all Census Tracts (CTs) in Ontario for ones with over 77 people per hectare (7,700 people per square kilometre), and over 80% ground related housing. This resulted in the identification of seven census tracts all located in the GTA, shown in Figure 5-3. Two census tracts were in Mississauga, two in Brampton, two in the City of Toronto, and one in Markham. This indicates that this density is achievable without relying on high persons per units only found in some municipalities, and in neighbourhoods built at different times. As shown the gross density for these Census Tracts range between 77.5 and 94.25 people per hectare, using almost exclusively ground-related dwellings, demonstrating that Hamilton's density goals can likely be met within neighbourhoods dominated by ground-related homes. Of note the low number of examples in Ontario suggests that the 77 people per hectare target is pushing the boundaries of ground related density anywhere in Ontario, and the City of Hamilton should be prepared to work with developers in accommodating creative

approaches. As shown in the Aerial imagery in Figure 5-4, these areas typically have extremely short side yard and front yard setbacks, grid or near-grid street patterns, few bungalows and high lot coverage, efficient backyards, narrow rights of way, shorter lot depths, and efficient parkland and stormwater management facilities.

Figure 5-3: Example Density Census Tracts

	CTUID	Gross Person per Hectare	% of Single Detached Units	% of Semi-Detached Units	% of Row Housing Units	% of Apartment Units	% of Other Housing Units
1.	5350516.41	84.91	26%	23%	38%	9%	4%
2.	5350528.46	77.50	30%	37%	28%	2%	3%
3.	5350400.18	81.72	40%	0%	0%	15%	45%
4.	5350576.46	77.51	44%	27%	16%	2%	10%
5.	5350183.02	94.25	33%	45%	1%	16%	6%
6.	5350141.01	81.63	52%	27%	1%	18%	2%
7.	5350528.51	78.04	29%	7%	8%	16%	41%

SOURCE: urbanMetrics Inc., with 2021 Census Profile data.

Figure 5-4: Aerial Imagery of Example Census Tracts

Continued on next page

SOURCE urbanMetrics Inc. with Statistics Canada Cartographic Boundary file data.

Figure 5-5 showcases the typical housing typologies found in the example census tracts. These neighbourhoods are predominantly composed of two storey detached and semi-detached houses, townhouses, and some neighbourhoods containing a few low-rise apartments. By following this built form and land use pattern the White Church Urban Expansion Area can likely achieve 77 people and

jobs per hectare. Of note, is the fact that of the small share of units that are apartments, most in are 4-storey apartments which are only one storey taller than the typical townhouse built form.

These examples illustrate that it is likely that development of the White Church Urban Boundary Expansion Area can meet the required density target of 77 gross people per hectare outlined in Hamilton's draft framework.

Figure 5-5: Selected Built Forms in Example Census Tracts

SOURCE: Google Street View

6.0 Conclusions

urban Metrics

This land needs analysis has evaluated the need for additional ground-related housing in Hamilton to the years 2031 and 2051, and the ability of the proposed White Church Urban Expansion Area to meet this need while still supporting the intensification of other areas of the City of Hamilton. In particular, our analysis has identified the following findings:

- There is an estimated existing vacant residential land capacity that can accommodate some 39,700 units, as of October 2024. This increase in supply will be comprised of mostly apartment units (26,000) within both Designated Greenfield Areas and within the Built Boundary.
- The City of Hamilton has been successful in encouraging the construction of additional Dwelling Units (ADUs) though recent policy changes. At the current rate of construction there will be an additional 14,600 ADUs by 2051 which is an aggressive assumption.
- ADUs are similar in size to apartment units, and much smaller than all other forms of ground-related housing. As a result, ADUs are unlikely to fulfill the demand for ground-related housing and are likely to primarily serve as an alternative to traditional apartment units, as well as an intermediate housing type between ground-related and apartment units.
- If current housing demand trends were to continue there will be a need for an additional 29,400 units of ground-related housing by 2031. Assuming an intensification rate of 50%, there would be a need for an urban Boundary Expansion of approximately 309 hectares (~760 acres). This would likely require 8,400 households that want a ground-related home to live in an apartment.
- If current housing demand trends were to continue there will be a need for an additional 99,300 units of ground-related housing by 2051. Assuming an intensification rate of 50%, there would be a need for an urban Boundary Expansion of approximately 2,386 hectares (~5,900 acres). This would likely require 26,600 households that want a ground-related home to live in an apartment.
- The White Church Urban Expansion Area can likely achieve the required density target of 77 people and jobs per hectare using an efficient street layout, narrow setbacks, a suitable unit mix, suitable schools, parks, and commercial uses, and appropriately sized right of ways.
- The White Church Urban Expansion Area will not compete with the demand for apartment units in planned intensification areas, as there are no

apartment dwelling units proposed. While a small number of low-rise apartments in the Secondary Plan Area may assist in meeting the density target as further work is done, they are unlikely to be a critical requirement if the City works with developers on the neighbourhood characteristics that will facilitate higher densities in ground-related neighbourhoods. As a result, the expansion will not impact the continued redevelopment of areas targeted for increased density.

Appendix A Persons Per Unit Data

urban Metrics

A 1: City of Hamilton Persons Per Unit by Age and Type of Dwelling

Age of Dwelling	Singles and Semi-Detached						15 Year Average	15 Year Average Adjusted[3]
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total		
1-5	-	2.550	2.435	3.367	4.857	**3.403**		
6-10	-	-	2.236	3.557	4.973	**3.625**		
11-15	-	-	2.014	3.474	4.681	**3.518**	3.515	3.533
16-20	-	2.158	2.012	3.312	4.294	**3.329**		
20-25	-	1.917	1.825	3.191	4.373	**3.215**		
25-30	-	2.077	1.917	3.084	4.278	**3.147**		
30+	2.692	1.641	1.917	2.705	3.831	**2.654**		
Total	2.729	1.749	1.936	2.882	4.068	2.845		

Age of Dwelling	Multiples[1]						15 Year Average	15 Year Average Adjusted[3]
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total		
1-5	1.571	1.434	2.055	2.942	-	**2.625**		
6-10	-	1.324	2.008	2.850	3.727	**2.619**		
11-15	-	1.438	1.950	2.708	3.273	**2.563**	2.602	2.637
16-20	-	1.682	1.748	2.673	-	**2.413**		
20-25	-	1.571	1.752	2.687	-	**2.409**		
25-30	-	1.694	2.051	2.938	-	**2.642**		
30+	-	1.407	1.970	2.872	3.629	**2.550**		
Total	2.156	1.442	1.948	2.837	3.588	2.551		

Age of Dwelling	Apartments[2]						15 Year Average	15 Year Average Adjusted[3]
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total		
1-5	-	1.314	2.026	2.615	-	**1.665**		
6-10	-	1.337	2.112	3.714	-	**1.811**		
11-15	-	1.443	1.785	3.250	-	**1.723**	1.733	1.721
16-20	-	1.490	1.810	3.400	-	**1.808**		
20-25	-	1.417	2.240	3.760	-	**1.944**		
25-30	1.909	1.405	2.194	3.793	-	**1.902**		
30+	1.186	1.295	2.000	2.765	2.906	**1.701**		
Total	1.229	1.311	2.011	2.861	3.031	1.720		

Age of Dwelling	All Density Types					
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total
1-5	1.875	1.401	2.117	3.203	4.780	**2.751**
6-10	2.250	1.424	2.077	3.333	4.792	**3.122**
11-15	1.600	1.569	1.925	3.222	4.577	**3.057**
16-20	2.800	1.592	1.845	3.158	4.290	**2.922**
20-25	-	1.478	1.982	3.070	4.245	**2.814**
25-30	2.400	1.466	2.104	3.064	4.140	**2.758**
30+	1.371	1.330	1.965	2.730	3.803	**2.370**
Total	1.534	1.356	1.975	2.873	4.011	2.517

[1] Includes townhouses and apartments in duplexes.
[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.
[3] Adjusted based on historical trends.
Notes: Does not include Statistics Canada data classified as "Other." P.P.U. not calculated for samples less than or equal to 50 dwelling units and does not include institutional population.

SOURCE: Watson 7 Associates, December 21, 2023, Schedule 7, *Development Charges Background Study : City of Hamilton*.

Appendix B City of Hamilton LNA Headship Rates

B 1: Headship Rates from City of Hamilton Revised Urban Land Needs Assessment

Figure A-2
City of Hamilton
Housing Headship Rates, 2021 to 2051

Age Cohort	2006	2011	2016	2021	2026	2031
0-14	-	-	-	-	-	-
15-24	0.0849	0.0884	0.0743	0.0736	0.0736	0.0736
25-34	0.3783	0.3697	0.3688	0.3651	0.3651	0.3651
35-44	0.5083	0.5100	0.4999	0.4950	0.4950	0.4950
45-54	0.5509	0.5546	0.5525	0.5471	0.5471	0.5471
55-64	0.5672	0.5770	0.5762	0.5705	0.5705	0.5705
65-74	0.6083	0.6012	0.6055	0.5995	0.5995	0.5995
75+	0.6220	0.6318	0.6129	0.6069	0.6069	0.6069
Total	**0.3714**	**0.3808**	**0.3831**	**0.3805**	**0.3832**	**0.3858**

Notes: Headship rate analysis is informed by 2016 Census age of primary household maintainer data and adjusted to align with 2021 Census total headship rate data and trends.
Source: 2006 to 2016 derived from Statistics Canada Census data, 2021 to 2031 derived by Watson & Associated Economists Ltd. based on 2021 Census total headship rate data and trends.

SOURCE: Watson & Associates Economists, September 15, 2022, Figure A-2, *City of Hamilton Revised Urban Land Needs Assessment (L.N.A.), 2031.*

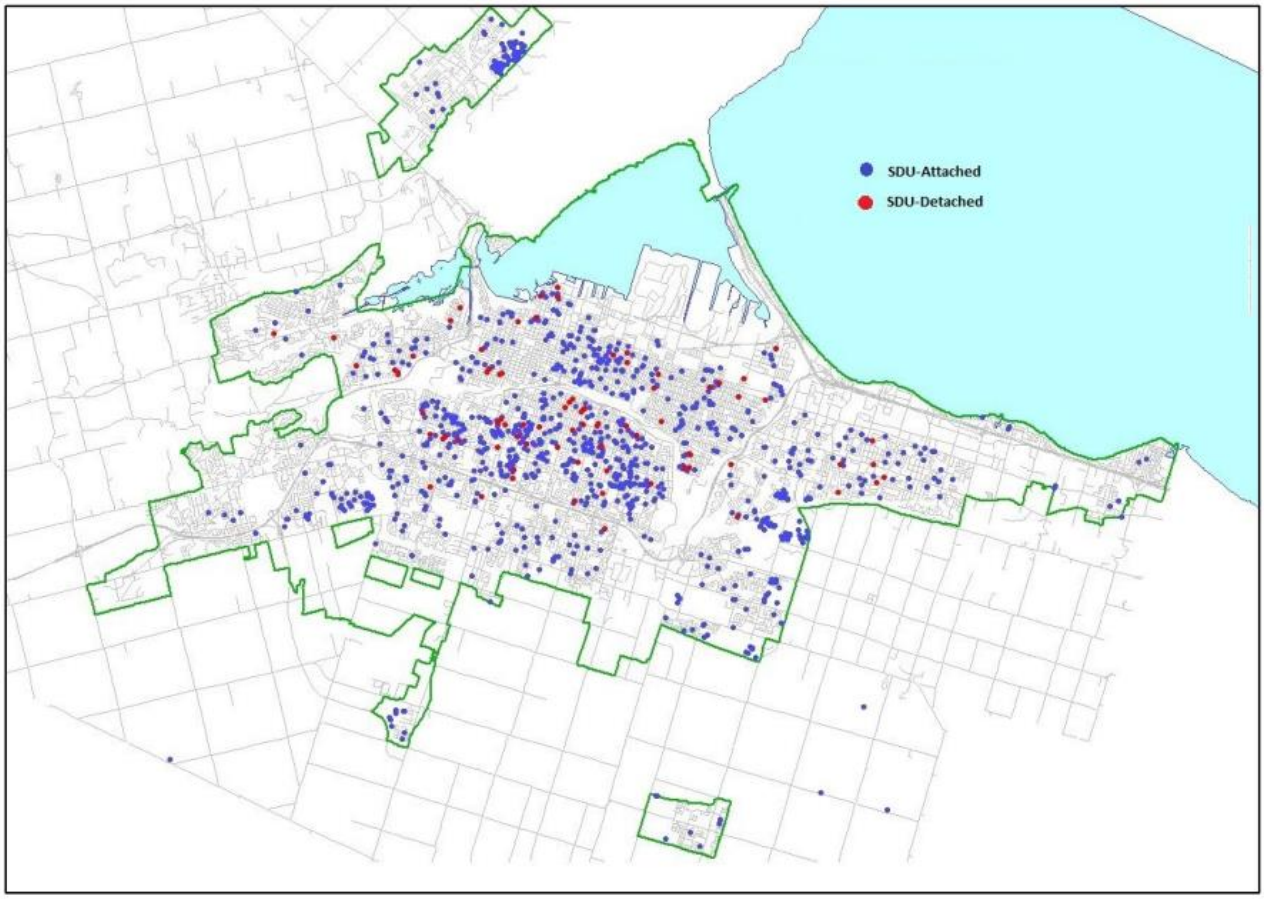
Appendix C Housing Supply Data

C 1: Secondary Units by Ontario Municipality, 2019

Municipality	Estimated Number of Secondary Units	Estimated Percentage of Ground-oriented Properties that Contain a Secondary Unit	Estimated Percentage of Secondary Units That Were Basement Apartments	Average Floor Area of Basement Apartments
Toronto	74,752	15.4%	47.6%	719
Brampton	13,558	9.6%	69.8%	849
Mississauga	10,012	7.4%	56.5%	858
Ottawa	8,495	3.3%	48.7%	818
Greater Sudbury	4,878	8.9%	59.8%	710
Hamilton	4,687	3.1%	40.2%	836
London	3,739	3.7%	58.9%	736
Oshawa	3,608	7.7%	68.6%	737
Markham	3,564	4.3%	33.0%	903
Thunder Bay	3,301	8.4%	68.3%	711
Guelph	3,206	9.2%	74.1%	771
Barrie	3,011	7.2%	60.5%	818
Vaughan	2,849	3.4%	32.3%	1,168
Kitchener	2,803	4.6%	59.8%	786
Windsor	2,479	3.6%	20.3%	863
Kingston	2,176	5.7%	52.0%	771
Ajax	2,101	6.4%	68.4%	785
Richmond Hill	2,089	4.2%	58.2%	992
Cambridge	1,792	4.4%	31.1%	791
St. Catharines	1,492	3.6%	46.0%	758
Peterborough	1,492	5.8%	50.8%	786
Whitby	1,371	3.7%	64.4%	854
Oakville	1,161	2.1%	45.6%	959
Brantford	905	3.0%	25.1%	904
Waterloo	895	3.1%	55.6%	833
Burlington	731	1.7%	42.3%	1,029
Milton	637	2.0%	42.7%	923
Belleville	606	3.6%	33.7%	884

SOURCE: CMHC, June 2021, Table 1, "Housing Market Insight – Ontario – Secondary Suites in Ontario". Data from MPAC, and CMHC calculations.

C 2: Additional Dwelling Unit Construction Activity 2022-2023



SOURCE: City of Hamilton, Figure 11, Market and Land Supply Monitoring Report 2023. Data from City of Hamilton building permits.

C 3: City of Hamilton Vacant Urban Residential Land Area & Unit Potential, 2023

Vacant Urban Residential Land Area & Unit Potential, June 2023

Planning	Single Detached		Semi-Detached		Townhouse		Apartment		City Total	
Status	**Units**	**Area (ha)**	**Units**	**Area (ha)**	**Units**	**Area (ha)**	**Units**	**Area (ha)**	**Units**	**Area (ha)**
Registered/Final Approved										
Ancaster	109	6.9	2	0.1	3	0.0	151	3.4	265	10.4
Dundas	3	0.3	2	0.2	29	0.6	0	0.0	34	1.1
Flamborough	18	1.0	0	0.0	26	0.9	658	4.5	702	6.5
Glanbrook	45	1.9	0	0.0	343	7.5	132	5.0	520	14.4
Hamilton	21	0.8	2	0.0	128	2.0	4,175	8.0	4,326	10.8
Stoney Creek	17	1.3	0	0.0	124	2.4	827	0.7	968	4.3
Total	**213**	**12.2**	**6**	**0.3**	**653**	**13.4**	**5,943**	**21.5**	**6,815**	**47.4**
Draft Approved										
Ancaster	93	4.1	0	0.0	41	0.8	0	0.0	134	4.9
Dundas	0	0.0	0	0.0	0	0.0	127	0.5	127	0.5
Flamborough	100	3.7	2	0.0	307	4.8	257	1.3	666	9.8
Glanbrook	926	29.2	0	0.0	579	13.7	135	0.9	1,640	43.9
Hamilton	746	34.1	62	1.3	451	10.8	4,685	13.7	5,944	59.9
Stoney Creek	161	7.9	24	0.5	736	15.1	1,349	8.4	2,270	31.9
Total	**2,026**	**79.1**	**88**	**1.8**	**2,114**	**45.2**	**6,553**	**24.8**	**10,781**	**150.9**
Pending										
Ancaster	40	2.8	0	0.0	104	3.4	170	0.7	314	6.8
Dundas	0	0.0	0	0.0	21	0.5	159	1.0	180	1.5
Flamborough	0	0.0	0	0.0	205	4.0	2,272	13.9	2,477	17.9
Glanbrook	196	6.6	44	0.9	472	9.4	148	2.5	860	19.4
Hamilton	168	6.5	0	0.0	452	8.2	3,967	8.8	4,587	23.5
Stoney Creek	331	12.4	0	0.0	1,502	30.6	3,268	6.6	5,101	49.6
Total	**735**	**28.3**	**44**	**0.9**	**2,756**	**56.1**	**9,984**	**33.5**	**13,519**	**118.8**
Potential Development										
Ancaster	230	11.6	32	1.1	224	4.7	260	1.7	746	19.1
Dundas	21	1.4	0	0.0	15	0.7	0	0.0	36	2.1
Flamborough	110	4.0	0	0.0	0	0.0	143	1.2	253	5.3
Glanbrook	37	2.1	0	0.0	0	0.0	0	0.0	37	2.1
Hamilton	304	15.7	24	0.6	448	9.7	1,929	6.6	2,705	32.6
Stoney Creek	705	34.8	326	9.2	2,476	47.1	872	11.8	4,379	102.8
Total	1,407	69.7	382	10.8	3,163	62.2	3,204	21.3	8,156	164.0
City Total										
Ancaster	472	25.4	34	1.1	372	8.9	581	5.8	1,459	41.2
Dundas	24	1.7	2	0.2	65	1.8	286	1.5	377	5.2
Flamborough	228	8.8	2	0.0	538	9.6	3,330	21.0	4,098	39.4
Glanbrook	1,204	39.9	44	0.9	1,394	30.7	415	8.4	3,057	79.9
Hamilton	1,239	57.1	88	1.9	1,479	30.7	14,756	37.0	17,562	126.8
Stoney Creek	1,214	56.4	350	9.7	4,838	95.2	6,316	27.4	12,718	188.7
Total	**4,381**	**189.3**	**520**	**13.8**	**8,686**	**176.9**	**25,684**	**101.1**	**39,271**	**481.2**

Source: City of Hamilton Planning and Economic Development Department GIS, Data as of June 30, 2023

1. Data derived from the City of Hamilton Planning Property Inventory containing various assumptions. Although the data has been captured as accurately as possible, some errors may be present due to insufficient or outdated information.
2. Totals may differ due to rounding.
3. **The Urban Area does not include recent OPA167 expansion lands from the November 2022 Provincial approval.**

Data as of June 30, 2023

SOURCE: City of Hamilton, October 17, 2023, *Communications Update - Vacant Residential Land Area – 2023 Update (City Wide).*

urban Metrics

C 4: City of Hamilton Vacant Residential Land Supply by Location Within Built Boundary, 2023

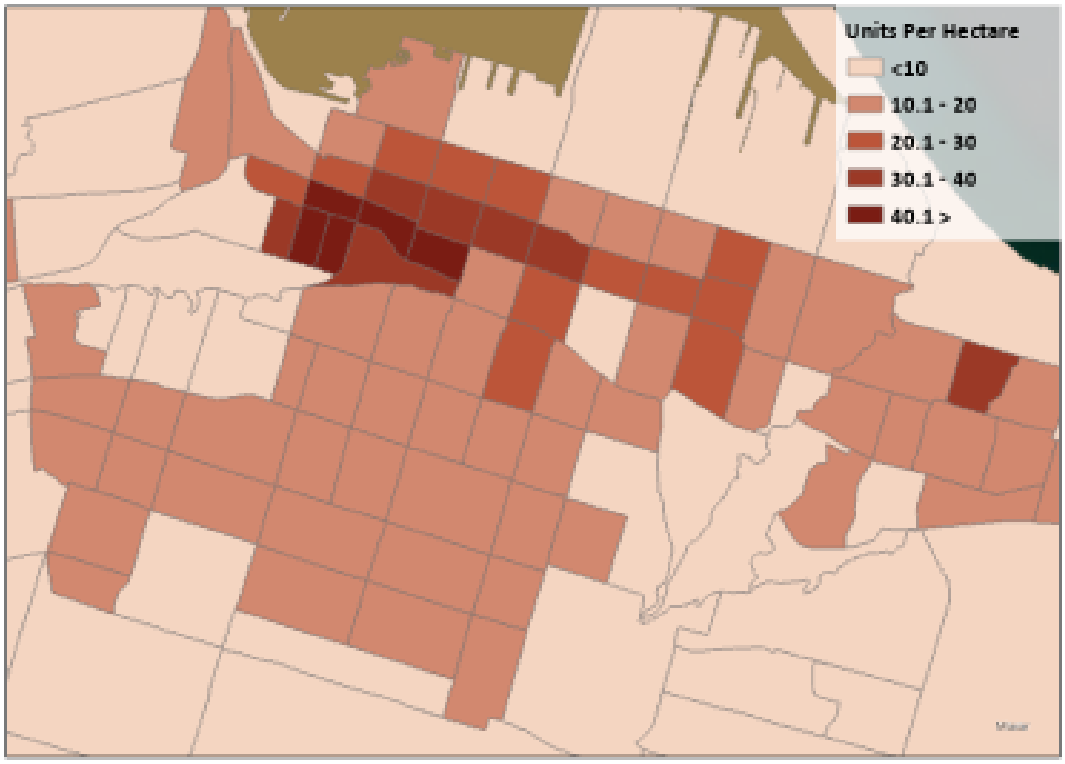
Area	Units	Vacant Residential Land (hectares)
Outside Built Boundary		
Ancaster	951	29.0
Dundas	0	0.0
Flamborough	3,941	36.4
Glanbrook	2,975	71.7
Hamilton	2,739	73.2
Stoney Creek	8,977	148.5
Within Built Boundary		
Ancaster	499	11.6
Dundas	377	5.2
Flamborough	146	2.4
Glanbrook	432	10.4
Hamilton	13,490	50.6
Stoney Creek	4,647	42.0
City Wide	39,174	481

Source: City of Hamilton

SOURCE: City of Hamilton, November 5, 2024, Table 6, *Market and Land Supply Monitoring Report - 2023 and Interim 2024 Update (PED24110) (City Wide)*.

Appendix D Hamilton Unit Density

D 1: Map of Percentage of Unit Density per Hectare by Census Tract in Hamilton



SOURCE: urbanMetrics Inc., with 2021 Census data.