

Forecasting Housing Needs to 2051: York Region Is Credible, Hamilton Is Not



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Executive Summary

York Region ("York") and the City of Hamilton ("Hamilton") recently prepared housing needs forecasts by dwelling type and policy area (delineated built-up and greenfield) for 2021–2051. Housing needs by dwelling type are a vital input into the calculation of residential land needs. This paper examines these forecasts for conformity with the Province's land needs assessment methodology and the extent to which staff recommendations to their respective Councils are consistent with the market-based land supply test as required by the methodology.

While Hamilton and York generally adhere to the Province's housing needs methodology to forecast housing needs for 2021-2051, there are weaknesses in what they have done:

- **The focus on housing needs generated by household growth alone understates the housing needed to maintain or improve overall affordability**

Both forecasts ignore the land needs assessment methodology's discussion of adjusting household growth for factors such as the replacement of units removed from the existing housing stock, changes in vacancy, market contingency factors and other mitigating factors. A recent report by an expert panel in B.C. estimated that allowing for these adjustments, including an affordability adjustment to compensate for past supply shortfalls, could increase estimates of medium-term housing needs by up to a third more than estimates based on household growth alone.

- **York's 50% recommended intensification target is better supported by market-based analysis than is Hamilton's 60% target – 50% is the minimum specified in the Growth Plan**

York Region's recommendation to target building 50% of all new housing in delineated built-up areas is reasonable as

an upper limit of market-based demand. However, due to servicing constraints on the supply of buildable greenfield land, these targets are lower than the intensification rate that the Region has recently achieved for its built-up areas. The Region expects these constraints to diminish as new community areas (greenfields) approved more than a decade ago come on stream.

Hamilton's recent intensification rate at 35% to 37% has been considerably lower than York's 50%. However, Hamilton's consultant regards 48% as approaching the maximum market demand for housing in the built-up area. Consequently, the City's planners' recommendation of a 60% intensification target for 2021-2051 as a whole appears inconsistent with the market-based land supply test.

- **York's recommended 60 residents/jobs per net hectare appears more reasonable than Hamilton's recommended 77 residents for designated greenfield areas – the Growth Plan specifies a minimum of 50**

The planners in York recommend a density factor of 60 persons/community jobs per net hectare between 2021-2051. This is roughly in line with recent experience in the Region based on Census of Canada population counts and employment data from the Region's annual employment survey for 12 case studies.

In contrast, planners in Hamilton recommend a sizable increase in the planned density of the existing designated greenfield area from about 60 to 77 persons/community jobs for 2021-2051, which would exceed York by a wide margin. With Hamilton's land cost structure lower than York's and its housing demand less robust, Hamilton's recommendation seems inconsistent with the market-based land supply test.

The bottom line is that York's forecast of future greenfield land needs during 2021-2051 is more reasonable than Hamilton's, with Hamilton significantly understating its greenfield land needs. In this context, Hamilton's consultant warns the City about the adverse impacts of adopting a too aggressive intensification target, including fiscal and service delivery challenges.

Background

The provincial government requires all upper-tier and single-tier municipalities in the Greater Golden Horseshoe ("GGH") to ensure the availability of sufficient lands for housing needs up to 2051. Therefore, forecasts of new housing needs by dwelling type and policy area (delineated built-up and designated greenfield)¹ are essential to determining land needs.

The Province released a land needs assessment methodology in 2020² for municipalities to use in combination with policies in *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (2020) (the "Growth Plan") to determine the land necessary to accommodate the forecast growth in housing needs up to 2051.³

1 Delineated Built Boundary: The limits of the developed urban area as defined by the Minister in consultation with affected municipalities for the purpose of measuring the minimum intensification target in the Growth Plan. **Delineated Built-up Area:** All land within the delineated built boundary. **Designated Greenfield Area:** Lands within settlement areas (not including rural settlements), but outside of delineated built-up areas that have been designated in an official plan for development and are required to accommodate forecasted growth to the horizon of this Plan. Designated greenfield areas do not include excess lands.

2 Ministry of Municipal Affairs and Housing (2020). "A Place to Grow: Growth Plan for the Greater Golden Horseshoe: Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020)." Online. Available at: <https://files.ontario.ca/mmah-land-needs-assessment-methodology-en-2020-08-27-v2.pdf>

3 Ministry of Municipal Affairs and Housing (2020). "A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020." [Online]. Available at: <https://files.ontario.ca/mmah-place-to-grow-office-consolidation-en-2020-08-28.pdf>

Municipalities must follow the minimum density and intensification targets set out in the Growth Plan. Typically, they are expected to accommodate a minimum of 50% of all new housing in the delineated built-up areas. In addition, for greenfield development, the expectation is to achieve a minimum density of 50 persons/community jobs per net hectare.⁴

If a municipality desires to achieve a density or intensification above the minimum ". . . the ability to provide a market-based supply of housing is an important consideration in determining whether a target can be achieved".⁵ Thus, a suburban municipality cannot adopt a higher intensification target, say 75%, to accommodate apartments in place of single- and semi-detached houses ("singles/semis") if it conflicts with a market-based needs analysis supporting the need for singles/semis.

York and Hamilton recently prepared housing needs forecasts by dwelling type and policy area for 2021–2051. This paper analyses these forecasts for conformity with the land needs assessment methodology and the extent to which staff recommendations to their respective Councils are compliant with the market-based land supply test required by the Growth Plan.

Overview of the land needs assessment methodology

The housing needs and land needs assessment methodology consists of the following steps:

- Take the population forecast in Schedule 3 of the Growth Plan, compute population age groups, then apply household formation propensities and propensities to occupy dwelling types. The result is a forecast of growth in households by type of dwelling occupied between 2021 and 2051 – this results in the "demographic housing needs";

4 The housing needs methodology refers to the delineated built-up area, the designated greenfield area, and rural lands, including rural settlements areas, as policy areas.

5 MMAH (2020). "Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020)," 8.

- Consider adjusting the growth in households by dwelling type to replace units lost in the existing housing stock through demolitions and conversions, changes in vacancies and other contingency and mitigating factors.⁶ The result is a forecast of total housing needs (household growth plus adjustment factors) by dwelling type;
- Determine the potential housing supply by dwelling type that existing lands in the delineated built-up, designated greenfield, and the rural areas of a municipality can accommodate;
- Deduct the existing land supply by dwelling type from the forecast housing needs – applying realistic units per net hectare factors for greenfield lands to calculate additional residential land requirements;
- Check the conformity of the housing needs allocation with the minimum intensification and density targets of the Growth Plan and adjusting the mix by policy area as necessary, keeping in mind the requirement to accommodate a market-based supply of housing to the extent possible;⁷ and
- If a municipality considers an alternative intensification or density target to the minimums, providing a market-based supply is essential in determining whether the target is achievable.⁸

6 Examples of contingency and other mitigating factors mentioned in the land needs assessment methodology are: lands that may not develop by 2051 because of landowner choice; the length of the planning process to make land ready for development; and other economic and demographic considerations not considered in the initial municipal analysis. MMAH (2020). “Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020),” 13-14.

7 MMAH (2020). “Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020),” 9.

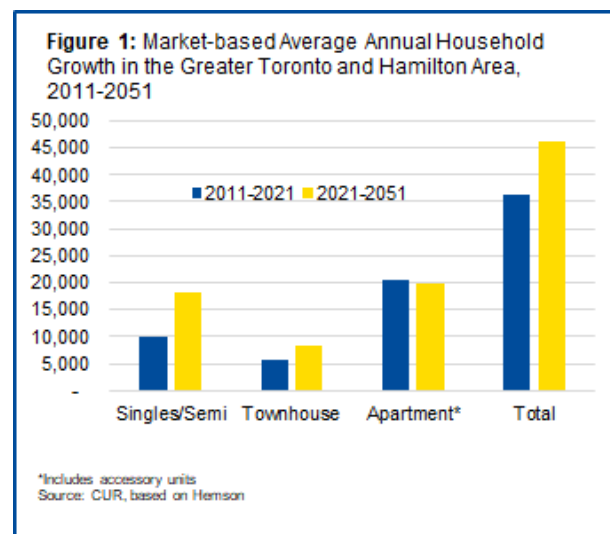
8 Ibid., 13.

Hemson forecasts of housing needs in the GGH

Schedule 3 of the Growth Plan includes population and employment forecasts for 2051 prepared for the Ministry of Municipal Affairs and Housing by Hemson Consulting Ltd. (“Hemson”).⁹ Hemson's distribution of GGH population growth among upper-tier and single-tier municipalities is partially based on a methodology incorporating housing needs by type of dwelling.

Hemson’s housing forecasts are market-based. Dwelling types include singles/semis, rows (“townhouses”), accessory units, and apartments.¹⁰

Figure 1 compares Hemson's average annual growth in households in the Greater Toronto and Hamilton Area (“GTHA”) between 2021 and 2051 with yearly average growth in the previous decade.



9 Hemson Consulting Ltd. (2020). “Greater Golden Horseshoe: Growth Forecasts to 2051.” Prepared for the Ministry of Municipal Affairs and Housing. [Online]. Available at: <https://www.hemson.com/wp-content/uploads/2020/08/HEMSON-GGH-Growth-Outlook-Report-26Aug20.pdf>

10 In this paper, in addition to considering singles/semis and townhouses separately, we also combine them into the category of ground-related homes. We add accessory units to Hemson’s count of apartments.

Highlights from this market-based forecast include:

- The average annual growth in housing to satisfy household growth alone is forecast to be nearly 30% higher in 2020-2051 than in 2011-2021 – 46,300 units compared to 36,200; and
- The expectation is that singles/semis will account for most of the growth (8,300 units), with apartment needs remaining flat at about 20,000.

The Hemson report states that individual municipalities need not necessarily adopt its housing mix forecasts. However, it is reasonable to expect municipalities considering housing needs with a significantly different dwelling type mix than Hemson's forecasts to justify their preference.

While the Hemson household growth forecasts by type of dwelling are not official Growth Plan forecasts, they represent Hemson's best estimates of market-based housing needs for both the entire GGH and among its upper-tier and single-tier municipalities. As a result, the Province of Ontario can assess municipal compliance with the adjusted market-based land supply needs by summing the individual municipal forecasts by unit type and comparing the results to the Hemson forecasts, while allowing for adjustments for the minimum intensification and density targets.

Growth in households by dwelling type and policy area – York Region and City of Hamilton

York and Hamilton have recently completed forecasts of housing needs by dwelling type and policy area to the year 2051 that are in general accordance with the housing needs assessment

methodology.¹¹ Both municipalities adopt the growth in households as the sole measure of future housing needs. Neither makes the methodological recommended adjustments for vacancies, replacement of losses in the existing housing stock, market contingencies or other factors.

York and Hamilton relied on consultants to undertake their analyses of future housing needs. In the final report prepared for York by Watson & Associates Economists ("Watson"), there is no mention of the Hemson household forecasts. The Hamilton report, prepared by Lorus and Associates ("Lorus"), relies on a slightly modified Hemson forecast in their market-based scenario.

Both municipalities assume a similar mix of future housing constructed in their delineated built-up areas – 20-25% ground-related and 75%-80% apartments. Thus, the expectation is most housing units built in the delineated built area will be apartments, and most of the housing in designated greenfield areas will be ground-related, with a higher number of singles/semis and a smaller number of townhouses. These differing dwelling mixes have profound implications for the affordability of ground-related homes if municipalities adopt policies intended to push a large share of new housing into the built-up area by reducing the supply of ground-related homes.

There are differences, however:

11 Lorus and Associates (2021). "City of Hamilton Land Needs Assessment to 2051." Prepared for the City of Hamilton. [Online]. Available: <https://www.hamilton.ca/sites/default/files/media/browser/2021-03-18/grids2-ped17010i-appendixa.pdf>; and Hamilton (2021) "Final Land Needs Assessment." [Online]. Available: <https://www.hamilton.ca/sites/default/files/media/browser/2021-03-18/grids2-ped17010i-staff-report.pdf>; York Region (2021). "Proposed 2051 Forecast and Land Needs Assessment." [Online]. Available: <https://yorkpublishing.escribemeetings.com/filestream.ashx?DocumentId=20345>; and Watson & Associates Economists Ltd. (2021). "Foundational Housing Analysis, York Region, Final Report." [Online]. Available: <https://yorkpublishing.escribemeetings.com/filestream.ashx?DocumentId=20347>

- **Historically, York Region has experienced a higher intensification rate than Hamilton**

The proportion of new housing in Hamilton built in its delineated built-up areas was 35% during 2008-2019, and 38% post-2016 Census.¹²

York's Land Needs Assessment Report from March 2021 states that the Region averaged approximately 50% intensification since 2006. This percentage increased to an average of 55% over the past five years. The report observes while this rate could continue to exceed 50% over the near to medium-term, it is expected to decline over time as more greenfield development occurs.¹³

- **Variations in housing dwelling type definitions**

The Hamilton dwelling types as listed are the same as Hemson's for its market-based and current trends forecasts. However, the two policy-adjusted scenarios Lorus examined combine single/semis with townhouses under the general term of "ground-related". In addition, Hamilton both defines stacked townhouses as apartments and adds ancillary units to ground-related homes.

York provides separate estimates for apartments in duplexes and stacked townhouses and then includes them with townhouses under the category of "medium density". Finally, Hemson categorizes stacked townhouses as apartments.

Our analysis combines single-detached and semi-detached houses under one category, categorizes townhouses by themselves, and includes accessory units and stacked townhouses in the apartments category.

12 Lorus and Associates (2021). "City of Hamilton Land Needs Assessment to 2051," 31.

13 York Region (2021). "Proposed 2051 Forecast and Land Needs Assessment," 17.

- **Differences in the density factors regarding development on designated greenfield lands**

According to the Growth Plan, municipalities such as Hamilton and York are to achieve a minimum of 50 residents and community jobs per hectare on greenfield lands ("community area lands"). York's research indicates that the average number of residents and jobs per hectare in 12 recently built or under construction communities was approximately 62.¹⁴ The Region assumes a density of 60 in greenfield (new community) areas in the future.

Hamilton's research found the planned density in the existing designated green belt area is 60 residents and community jobs per hectare as of 2019.¹⁵ Unlike York, Hamilton's future density factor varies according to the intensification target applied. The average number of residents and jobs combined varies from 53 per net hectare under the current trends' scenario, 65 under the minimum Growth Plan scenario, and 77 under the recommended 60% intensification target scenario (also called the "ambitious density scenario").

- **Different recommendations on intensification targets to 2051 for Council to adopt**

Hamilton planners recommend that the Council approve an intensification target for 2021-2051 that will see an average of 60% of all new housing built in the delineated built-up area.¹⁶ York planners, in contrast, recommend a 50% target for Council's consideration for the same period. As noted, Hamilton's intensification rate has been averaging 35%-38%, considerably below York's 50%-55%.

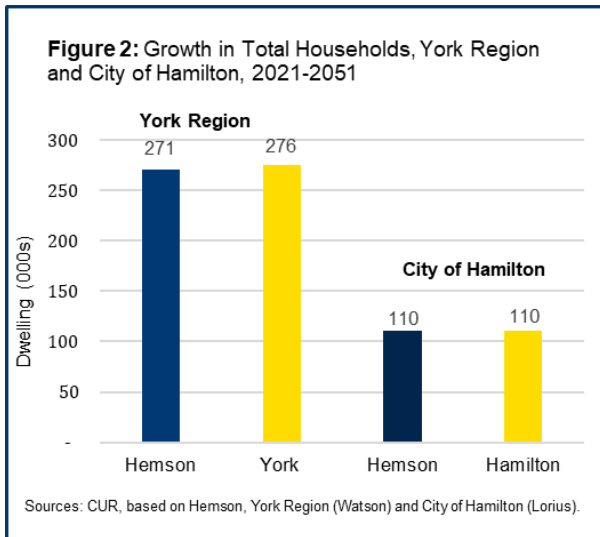
14 Ibid., 27.

15 Hamilton (2020). "Existing Designated Greenfield Area Density Analysis". [Online]. Available: <https://www.hamilton.ca/sites/default/files/media/browser/2020-11-16/lna-ped17010h-staffreport-appendix.pdf>, 13.

16 The recommended intensification targets for Hamilton are 50% for 2021-2031, 60% for 2031-2041 and 70% for 2041-2051.

Total household growth is the same as Hemson's

Figure 2 shows household growth in both the municipal and Hemson forecasts for 2021-2051. The anticipated growth in total households is the same or very close for the three forecasts. Thus, Hemson, York and Hamilton appear to apply similar households-forming propensities to similar population distributions by age group over the time period.

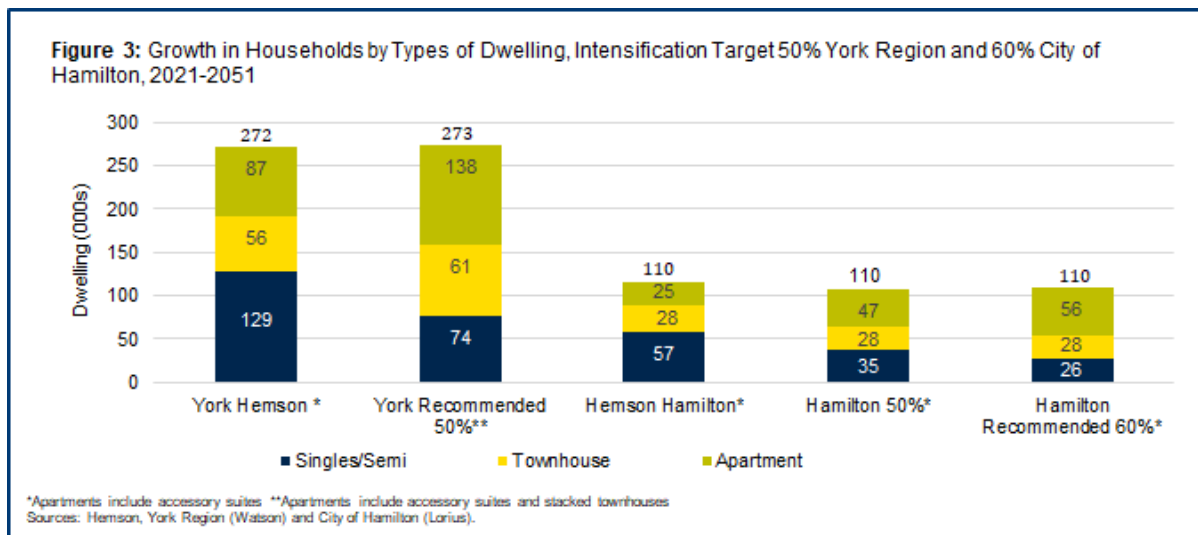


Many more apartments in dwelling mix, especially for Hamilton

Figure 3 compares the future housing mixes meant to comply with the minimum intensification targets and recommended by the planners in York and Hamilton to their respective Councils. As noted, York recommends the Growth Plan's **minimum** 50% target of all new housing to be built in the delineated built-up areas, whereas Hamilton recommends a target of 60% over 2021-2051.¹⁷ Lorius refers to this as the "ambitious density" scenario. It is the scenario recommended to Council by staff.

The effect of increasing Hamilton's intensification target to 60% is that the housing mix would mandate just over 50% of all housing built in the City between 2021 and 2051 be apartments, more than double the Hemson proportion. The 51% proportion is also considerably higher than the 43% resulting from applying the Growth Plan's minimum 50% intensification ratio.

Under the recommended intensification proportion of 50% in York, the apartments' share of new housing built is about 50%, up



¹⁷ The recommendation for Hamilton is for an intensification target of 50% in 2021-2031, 60% in 2031-2041 and 70% in 2041-2051, averaging 60% for the entire period.

from Hemson's 32%. Further, under York's recommended scenario, future ground-related housing needs are split relatively equally between single/semis and townhouses, compared to a two-thirds, one-third split in the Hemson base case scenario.

Reasonableness of the recommended intensification proportions

Lorius cautions Hamilton's Council that even achieving the minimum intensification of 50% of all new housing being built in the delineated built-up areas between 2021 and 2051 will be challenging and is at the high end of the range of demand:

*There is no question that recent housing market trends point to a strong future for intensification. And it is also clear that the City of Hamilton is in an attractive position to shift historic patterns of growth towards denser and more urban forms. However, it is important to understand that the Growth Plan target embodies a major shift in the nature of housing demand that will be a challenge for most municipalities to achieve, including Hamilton. So, although characterized as "minimum", the Growth Plan target is at the **high end of the range of demand** from a market perspective. For the City of Hamilton, it represents a rapid and significant increase in the amount of growth to occur through intensification and a substantial change to the profile of future housing demand in favour of apartments.*¹⁸

Lorius also undertook an intensification market demand analysis for Hamilton. Its "high demand" scenario assumed 48% intensification, which, below the **minimum** of 50% in the Growth Plan, is categorized as:

. . . approaching the maximum plausible demand outlook. It anticipates a significant acceleration of current apartment construction

¹⁸ Lorius and Associates (2021). "City of Hamilton Land Needs Assessment to 2051," 12.

*and growth in the central Hamilton real estate market. The forecast translates into 48% of new units within the built-up area. This level of intensification would have significant implications for the amount, type and scale of new development that would need to occur in the community.*¹⁹

Lorius labels the average 60% intensification target recommended by the planners over the whole 2021-2051 period as the "very ambitious" density scenario. It is not easy to fathom why the planners in Hamilton support this scenario when even their consultant regards 50% as being ambitious.

Lorius also warns the City about the adverse impacts of adopting a too aggressive intensification target, including potential fiscal and service delivery challenges:

*Under the Growth Plan, the intensification target has the effect of reducing the number of units allocated to the City's designated greenfield areas through the LNA and, in turn, the different types of units available to satisfy future demand. If the supply of greenfield and intensification units is not reasonably balanced, there is a risk that the Growth Plan forecast will not be achieved, which could lead to fiscal and service delivery challenges. As a result, the forecast presented in this report is a market-based outlook that represents, in our view, the most plausible range of future demand. It will be for the City to balance the market forecast with policy objectives to be developed as part of GRIDS2 and the MCR.*²⁰

¹⁹ Lorius and Associates (2021). "City of Hamilton Residential Intensification: Market Demand Analysis." Prepared for the City of Hamilton. [Online]. Available: <https://www.hamilton.ca/sites/default/files/media/browser/2021-03-18/grids2-ped17010i-appendixb.pdf>, 39.

²⁰ Lorius and Associates (2021). "City of Hamilton Residential Intensification: Market Demand Analysis," 36.

LNA = land needs analysis; GRIDS2 = the name for Hamilton's official plan review process; MCR = municipal comprehensive review.

Hamilton's use of a 60% intensification target does not comply with the Growth Plan's requirement for housing needs forecasts by dwelling type and policy area to be market-based.

The planners in York, in contrast, are comfortable with an intensification target of 50% of all new housing being built during 2021-2051:

Based on analysis from Watson and Associates (Attachment 3), a 50% intensification target appropriately reflects recent development trends, active residential development plans, and evolving longer-term demographic and socioeconomic trends within York Region. Watson notes that the Region could exceed a 50% intensification target in the near to medium-term based on the current supply of active development applications. Once servicing constraints in the designated greenfield area, particularly across northern York Region have been addressed, the likelihood of achieving greater than 50% over the long term is less certain. Watson, therefore, concludes that a 50% allocation of housing growth to the built-up area is appropriate.²¹

Conclusion

While Hamilton and York generally adhere to the Province's housing needs methodology to forecast housing needs for 2021-2051, there are weaknesses in what they have done:

- **The focus on housing needs generated by household growth alone understates the housing needed to maintain or improve overall affordability**

Both forecasts ignore the land needs assessment methodology's discussion of adjusting household growth for factors such as the replacement of units removed from the existing housing stock, changes in vacancy, market contingency factors and

other mitigating factors. A recent report by an expert panel in B.C. estimated that allowing for these adjustments, including an affordability adjustment to compensate for past supply shortfalls, could increase estimates of medium-term housing needs by up to a third more than estimates based on household growth alone.

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York Region's recommendation to target building 50% of all new housing in delineated built-up areas is reasonable as an upper limit of market-based demand. However, due to servicing constraints on the supply of buildable greenfield land, these targets are lower than the intensification rate that the Region has recently achieved for its built-up areas. The Region expects these constraints to diminish as new community areas (greenfields) approved more than a decade ago come on stream.

Hamilton's recent intensification rate at 35% to 37% has been considerably lower than York's 50%. However, Hamilton's consultant regards 48% as approaching the maximum market demand for housing in the built-up area. Consequently, the City's planners' recommendation of a 60% intensification target for 2021-2051 as a whole appears inconsistent with the market-based land supply test.

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²¹ Watson & Associates Economists Ltd. (2021). "Foundational Housing Analysis, York Region, Final Report," 17.

in line with recent experience in the Region based on Census of Canada population counts and employment data from the Region's annual employment survey for 12 case studies.

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The bottom line is that York's forecast of future greenfield land needs during 2021-2051 is more reasonable than Hamilton's, with Hamilton significantly understating its greenfield land needs. In this context, Hamilton's consultant warns the City about the adverse impacts of adopting a too aggressive intensification target, including fiscal and service delivery challenges.

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