BIG PICTURE PLANNING AND COMMUNITY DESIGN IN THE GGH

2015 OPPI CONFERENCE
October 7 – 2:15-3:15

MALONE GIVEN PARSONS LTD.

TODAY'S PRESENTATION

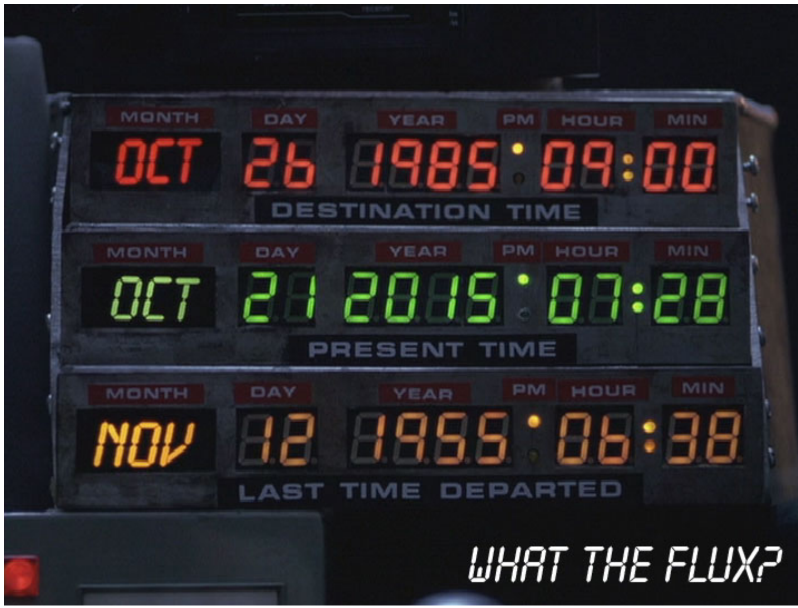
- Instructions for Polling

Respond at **PollEv.com/oppi** Text **OPPI** to **780-800-5606** once to join

- Using Google Earth

- Be entertained and challenged

BACK TO THE FUTURE - 2015



POLL #1

MOVIE PREFERENCE

What is your favourite movie from the Back to the Future franchise?

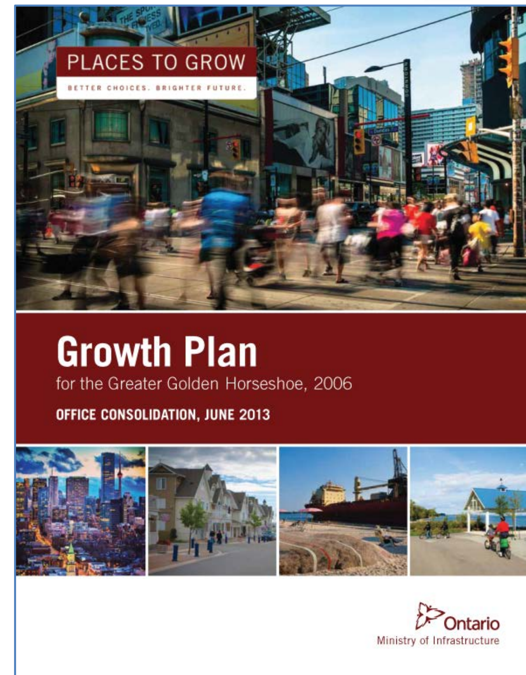
- Back to the Future
- Back to the Future Part II
- Back to the Future Part III
- What's Back to the Future?

POLL #2

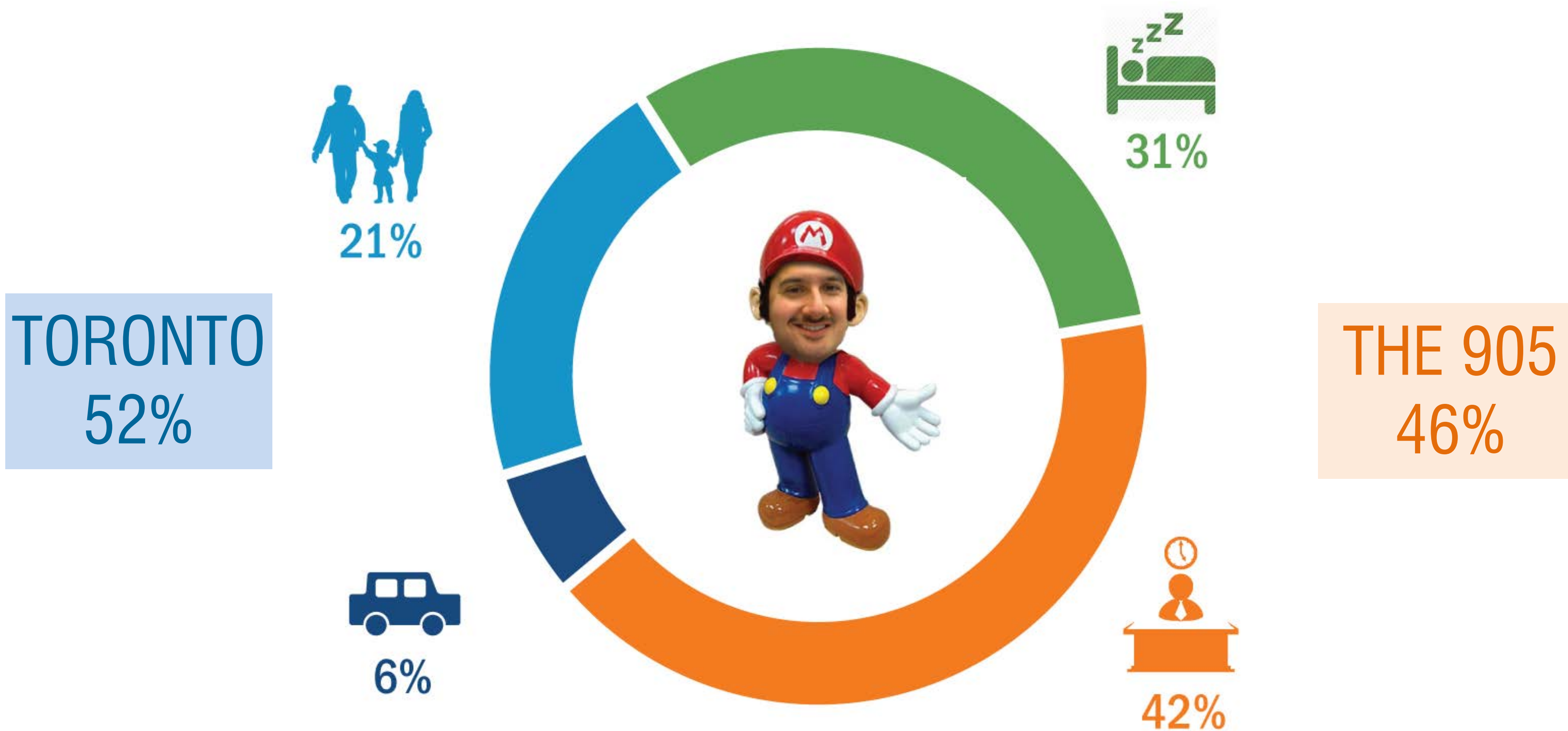
GROWTH PLAN

Is the Growth Plan a success?

- Yes
- No



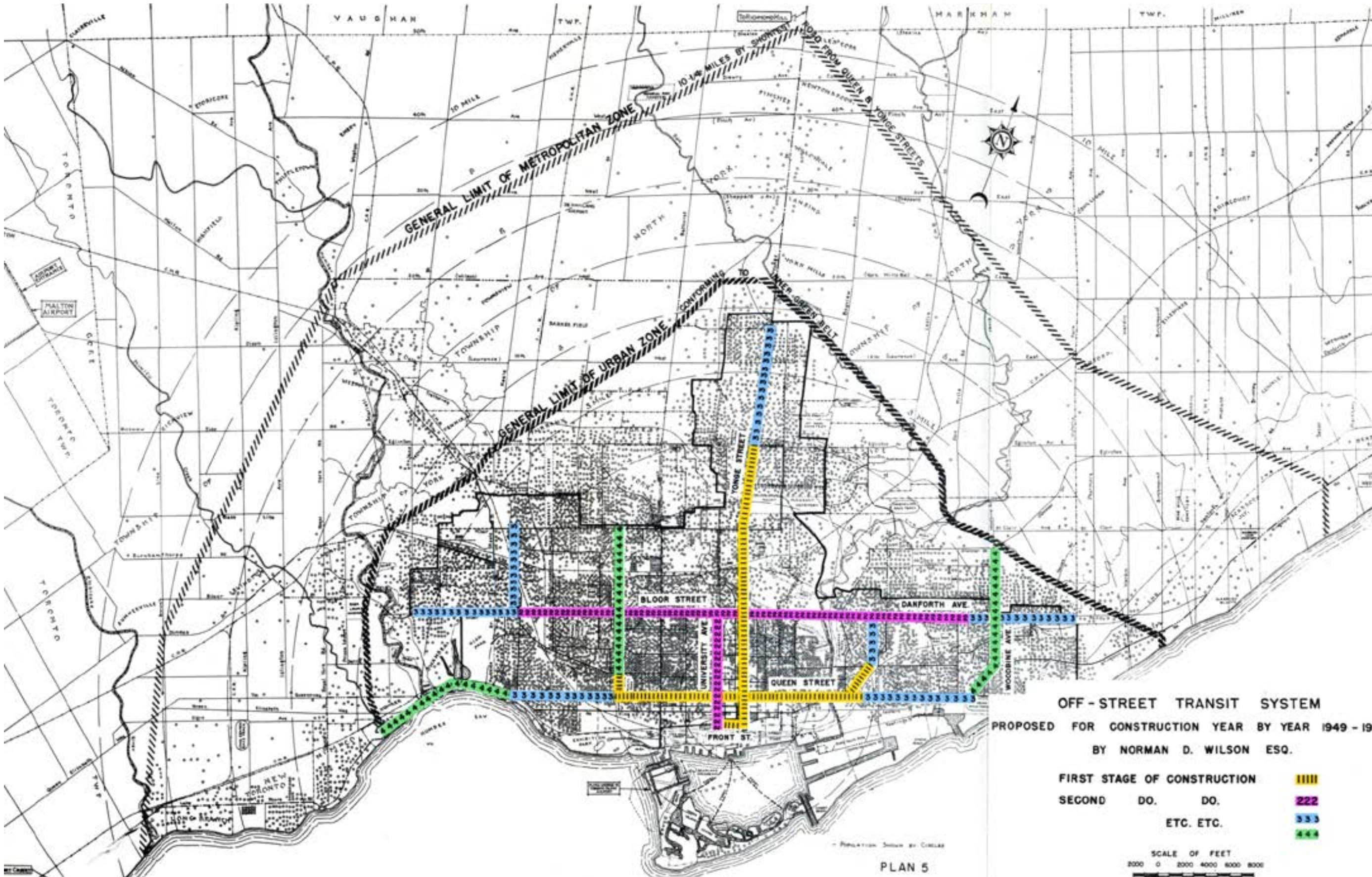
MATT CORY: A TALE OF 2 CITIES



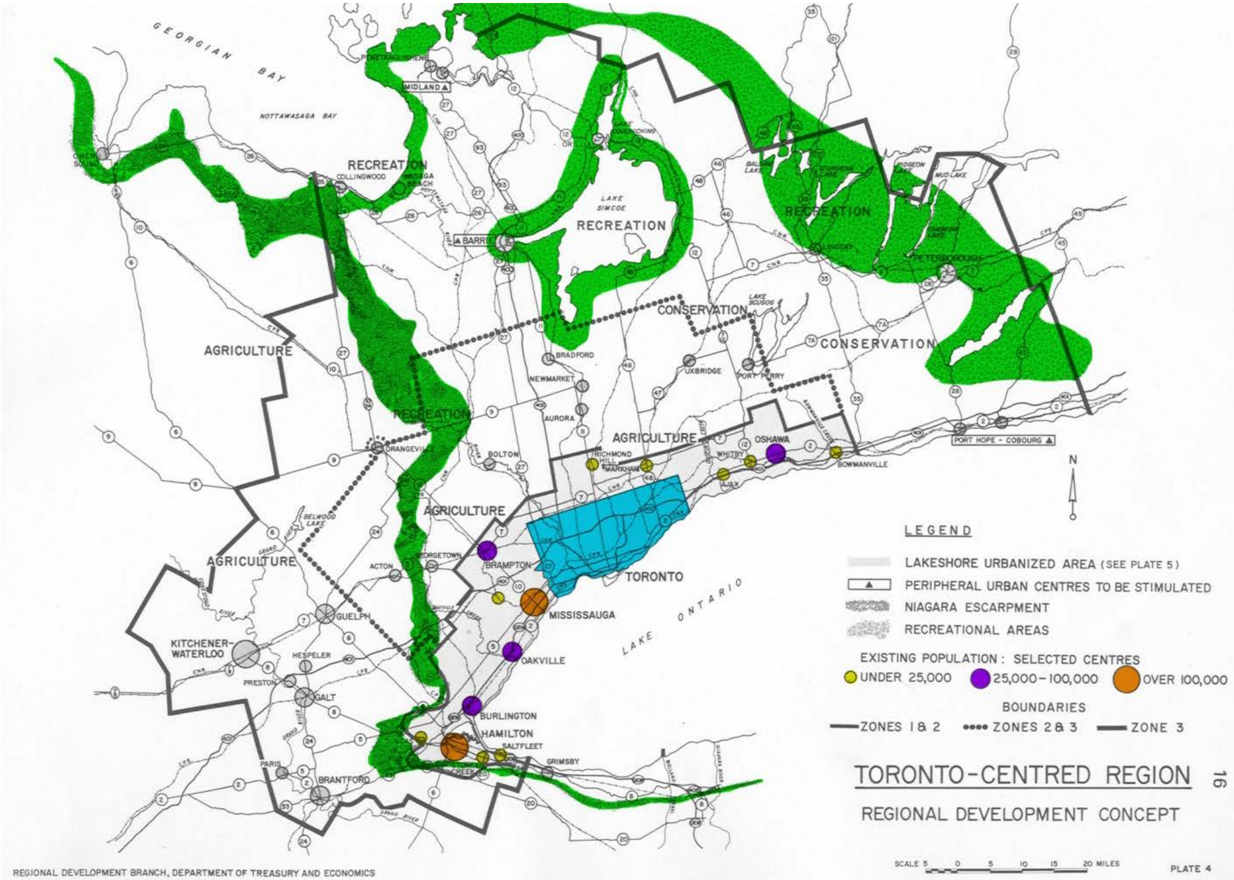
MATT CORY: A TALE OF 2 CITIES

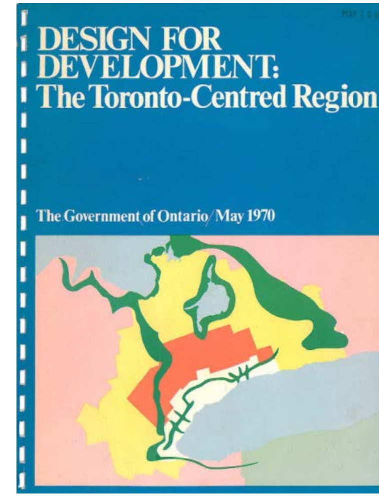
PLAN FOR METRO TORONTO - 1943

PLAN FOR METRO TORONTO - 1949

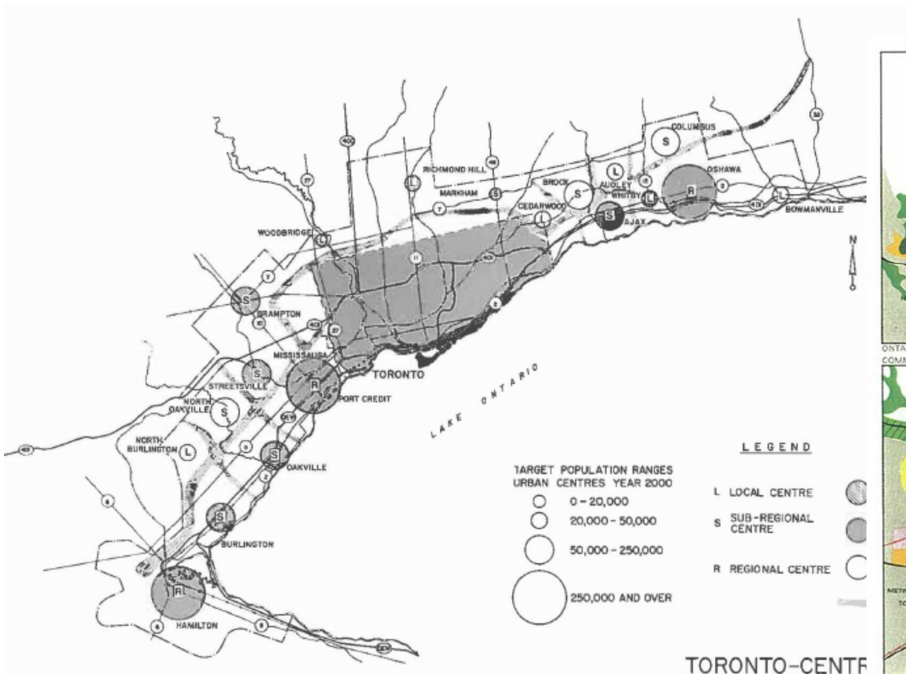


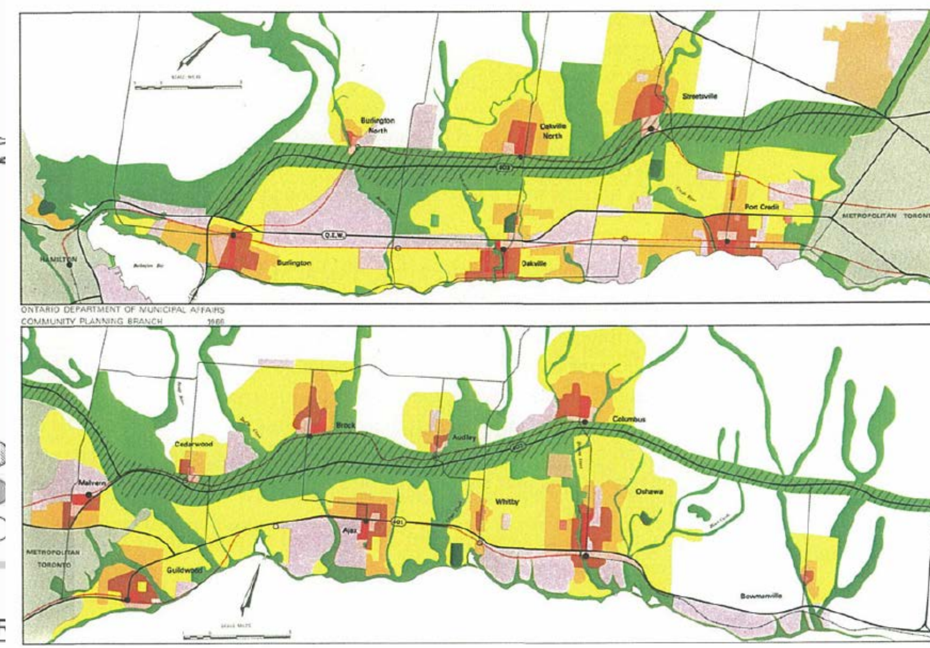
TORONTO CENTRED REGION PLAN - 1970



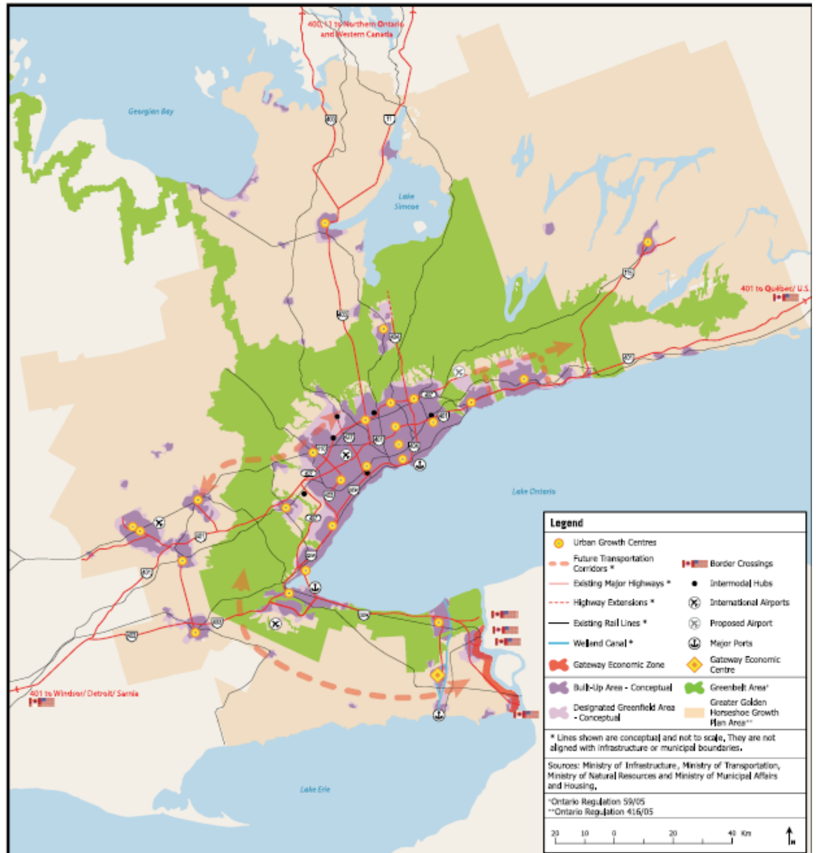


TORONTO CENTRED REGION PLAN 1970

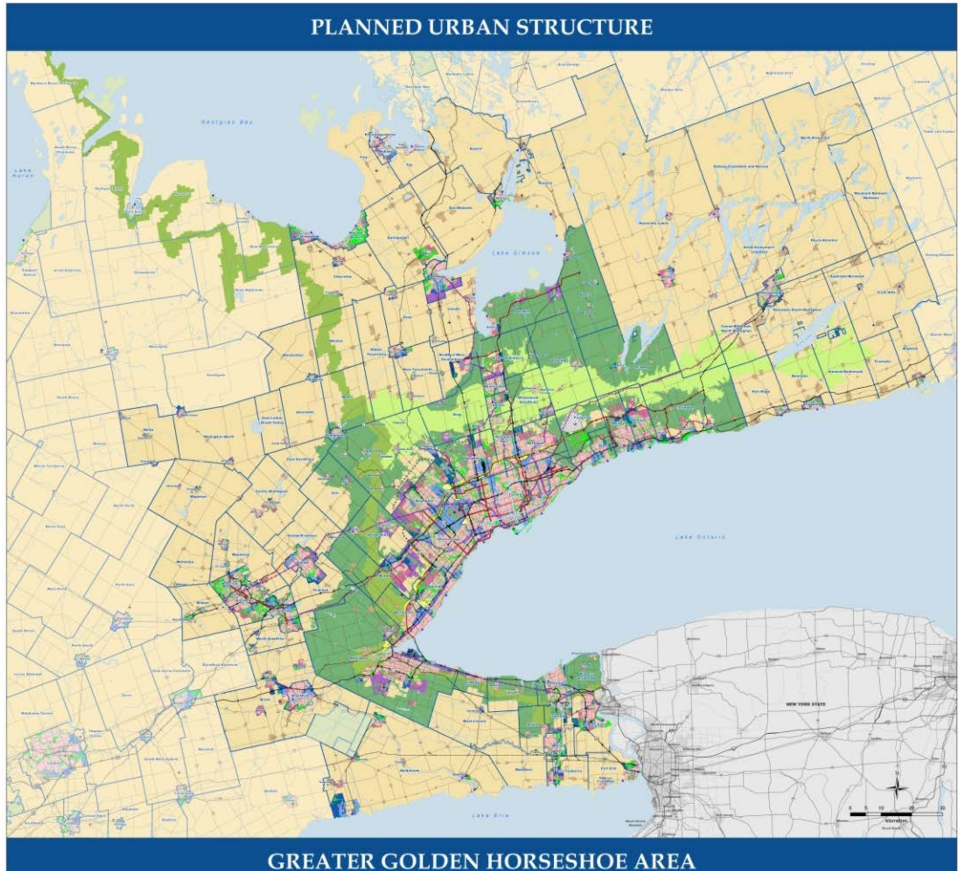




GROWTH PLAN FOR THE GREATER GOLDEN HORSESHOE (2006)



PLANNED URBAN STRUCTURE - 2015



POLL #3

INTENSIFICATION

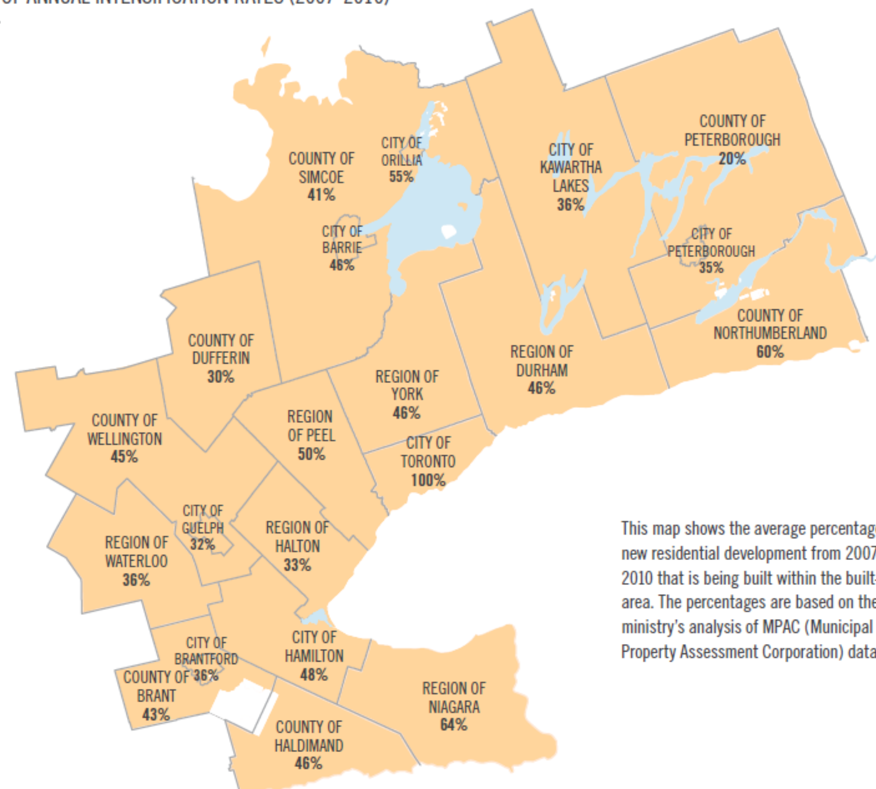
What should the intensification rate for the Inner Ring be going forward?

- 40%
- 50%
- 60%
- 100%

'I'M SURE THAT ONE WASN'T THERE LAST WEEK.'

P2G PERFORMANCE INDICATORS

MEASURING RESIDENTIAL INTENSIFICATION
AVERAGE OF ANNUAL INTENSIFICATION RATES (2007-2010)



This map shows the average percentage of new residential development from 2007 to 2010 that is being built within the built-up area. The percentages are based on the ministry's analysis of MPAC (Municipal Property Assessment Corporation) data.

POLL #4

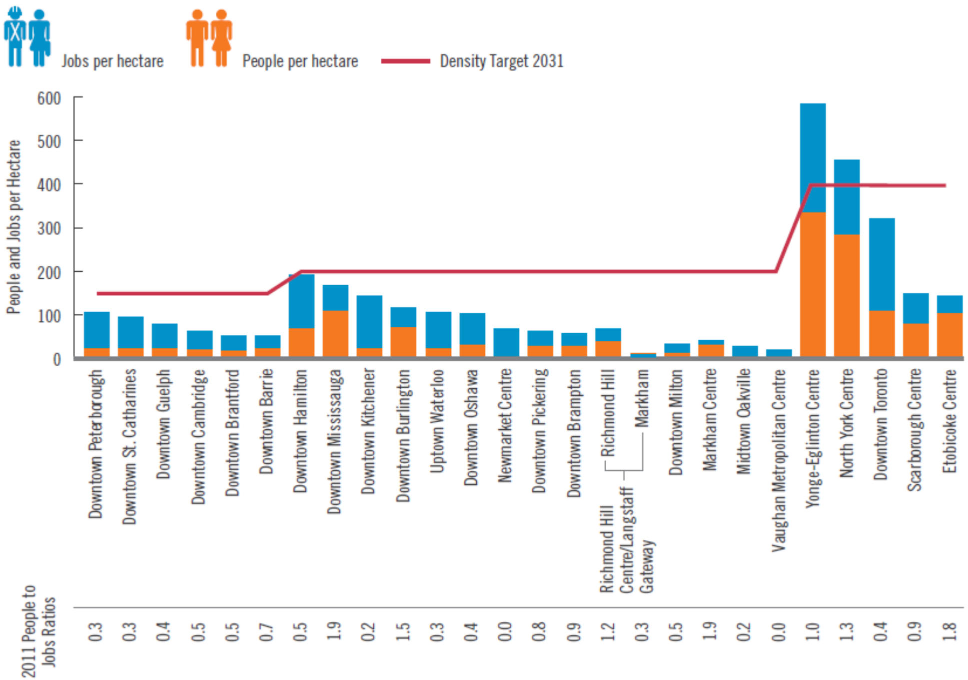
INTENSIFICATION

Where will we achieve the majority of our intensification targets?

- Secondary Suites
- Infill
- Corridors
- Centres

P2G PERFORMANCE INDICATORS

POPULATION AND EMPLOYMENT DENSITY FOR 25 URBAN GROWTH CENTRES (2011)



Note: A value of 1.0 indicates a ratio of one person to one job.

PLANNED DESIGNATED GREENFIELD AREA DENSITIES FROM UPPER- AND SINGLE-TIER OFFICIAL PLANS

MUNICIPALITY	PLANNED DENSITY (PEOPLE AND JOBS COMBINED PER HECTARE)
INNER RING	
City of Hamilton	50
Region of Durham	50
Region of Halton	50
Region of Peel	50
Region of York	50
OUTER RING	
City of Barrie	50
City of Brantford	50
City of Guelph	50
City of Kawartha Lakes	40*
City of Orillia	42*
City of Peterborough	50
County of Brant	40*
County of Dufferin	44*
County of Haldimand	29*
County of Northumberland	30*
County of Peterborough	40*
County of Simcoe	39*
County of Wellington	40*
Region of Niagara	50
Region of Waterloo	50

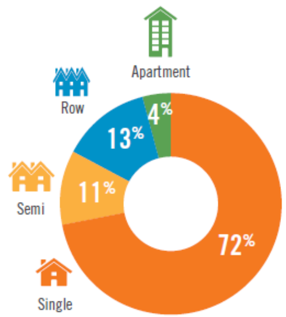
Note: City of Toronto has no designated greenfield areas.
*Values with an asterisk show municipalities in the outer ring for which an alternative density target was approved by the Minister.

P2G PERFORMANCE INDICATORS

CHARACTERISTICS OF THE DEVELOPING DGA – INNER RING

HOUSING MIX

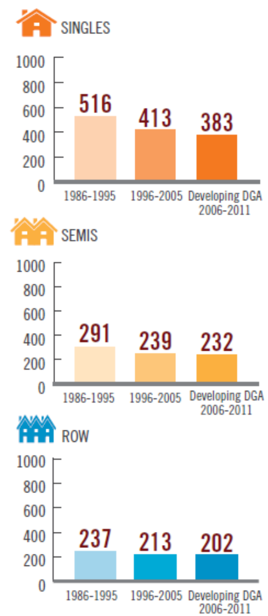
Developing DGA Housing Mix in the Inner Ring, 2011



The sets of charts and tables on this page and opposite give a snapshot of the characteristics of development. The tables above and on the opposite page show the size of the developing DGA in inner- and outer-ring municipalities, and estimated densities.

LOT SIZES

Inner-Ring Median Developing DGA Lot Sizes Compared to Historic Lot Sizes (Square Metres)



Note that 5% of these lots were developed before 2006.

AREA AND ESTIMATED DENSITY

For the Developing DGA in Inner-Ring Municipalities, 2011

	Developing DGA (ha)	Percentage of Total DGA	Estimated Density (people and jobs per ha)
City of Hamilton	219	4.8%	36
Region of Durham	409	3.1%	40
Region of Halton	310	2.6%	60
Region of Peel	671	6.7%	60
Region of York	1,073	5.6%	49

	Estimated People	Estimated Jobs
City of Hamilton	7,400	475
Region of Durham	15,210	970
Region of Halton	17,430	1,130
Region of Peel	38,105	2,215
Region of York	48,975	3,875

POLL #5

HOUSING ARRANGEMENTS

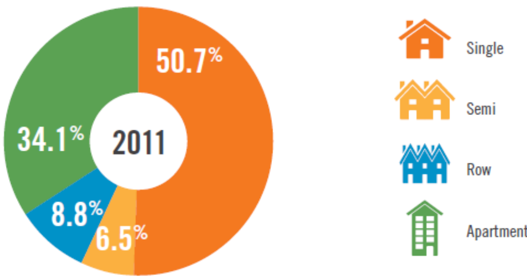
What kind of home do you live in?

- Single-Detached
- Semi-Detached
- Row/Townhouse
- Apartment
- Other (e.g. Boathouse)

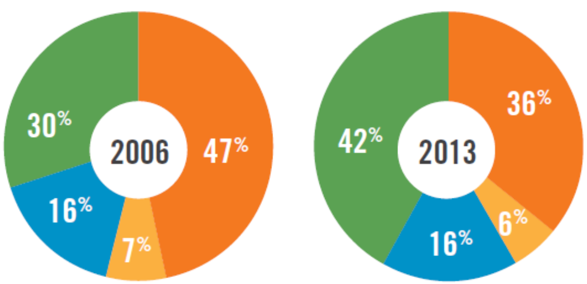
'I said I lived in a boathouse not a houseboat.'

P2G PERFORMANCE INDICATORS

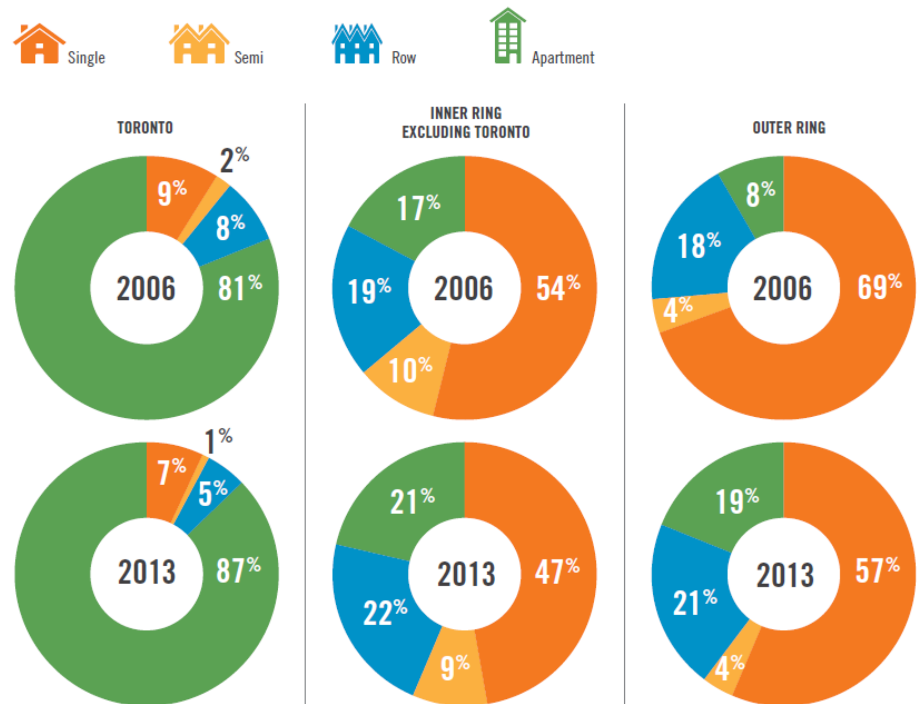
MIX OF HOUSING - OVERALL STOCK
IN THE GREATER GOLDEN HORSESHOE, 2011



MIX OF HOUSING - NEW UNITS
IN THE GREATER GOLDEN HORSESHOE, 2006 AND 2013



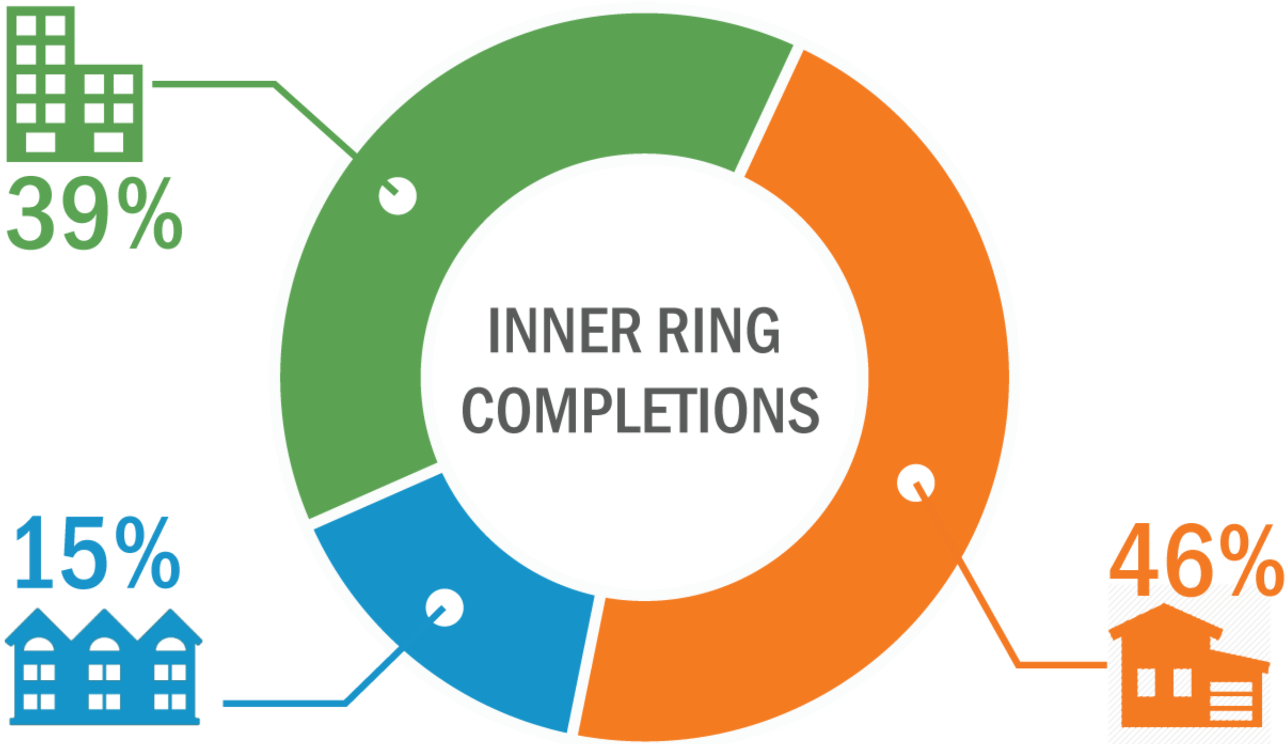
MIX OF NEW HOUSING UNITS IN TORONTO, REST OF INNER RING AND OUTER RING, 2006 AND 2013



Note: Percentages may not total 100 per cent due to rounding.

INNER RING COMPLETIONS

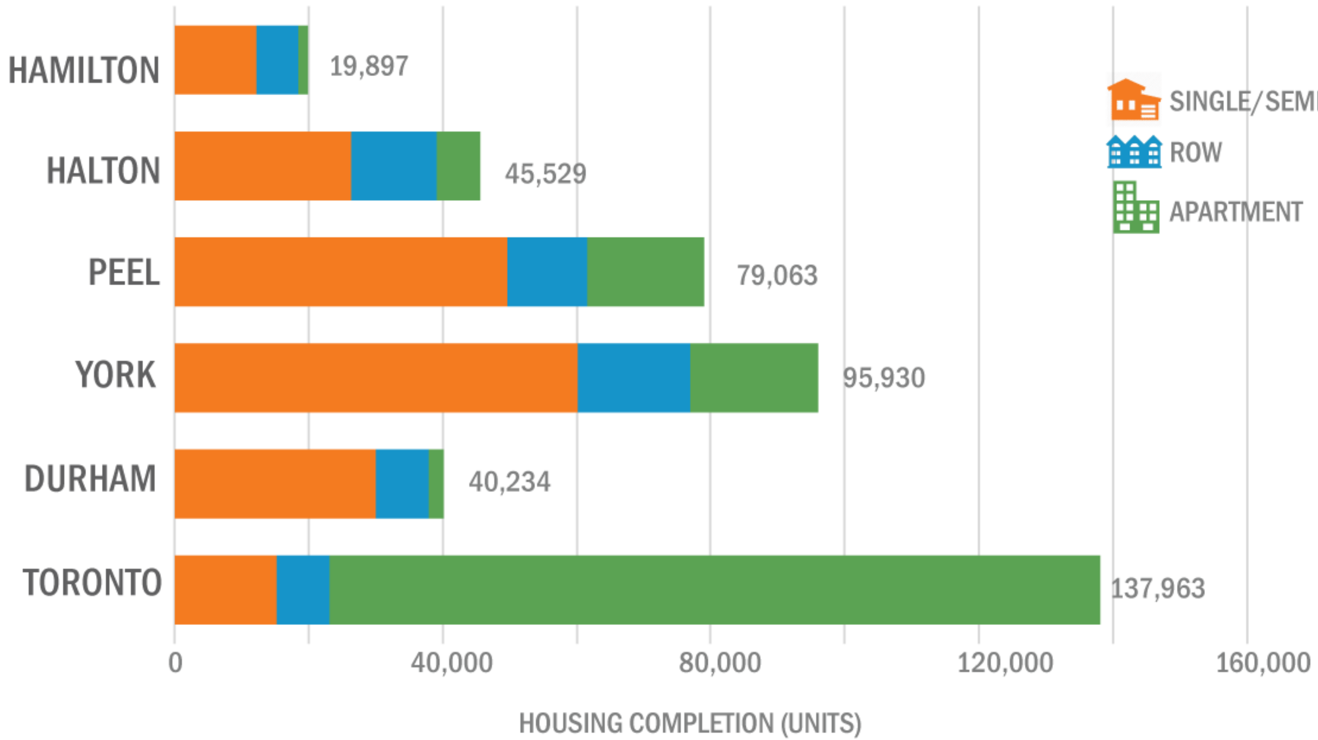
By Housing Type : 2004-2014



Source: CMHC

INNER RING COMPLETIONS

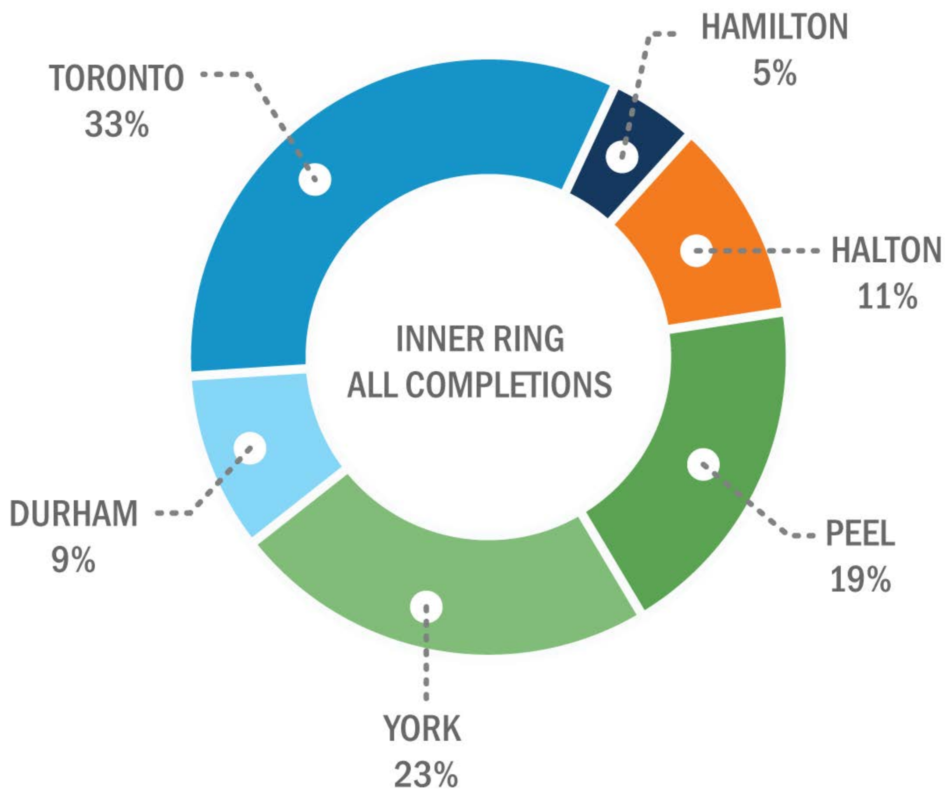
By Region and Housing Type : 2004-2014



Source: CMHC

INNER RING COMPLETIONS

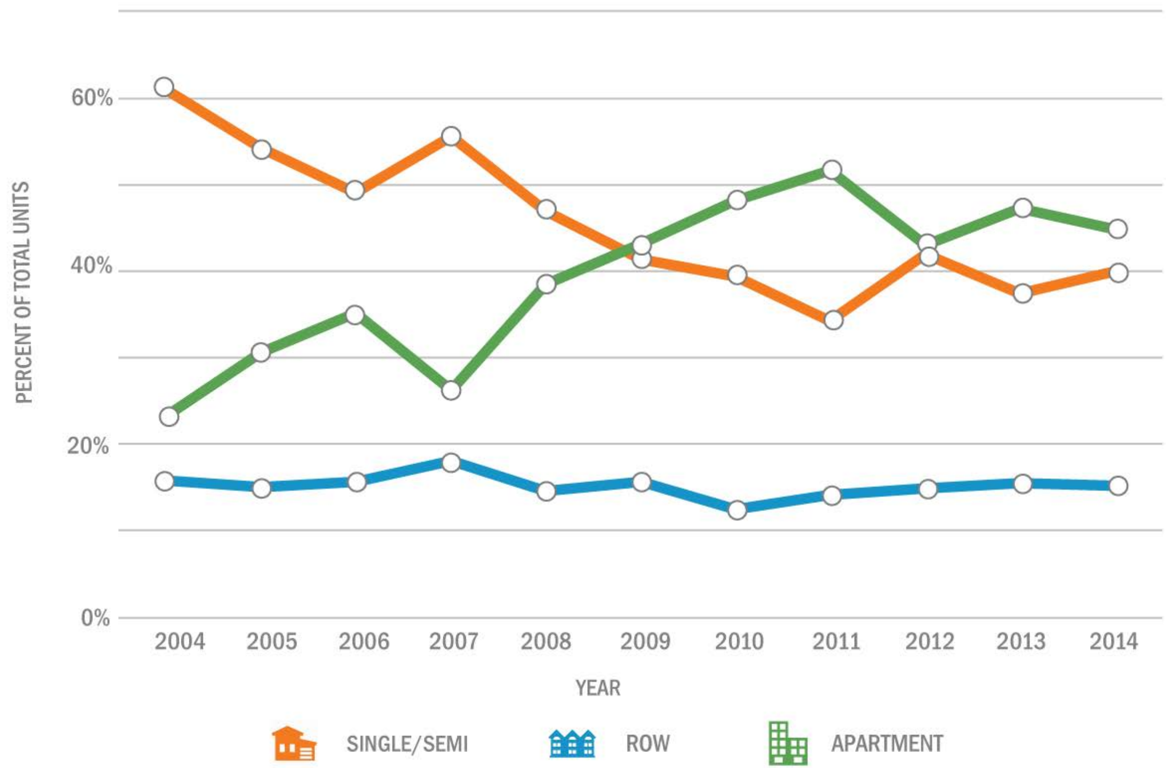
All Completions by Region: 2004-2014



Source: CMHC

INNER RING COMPLETIONS

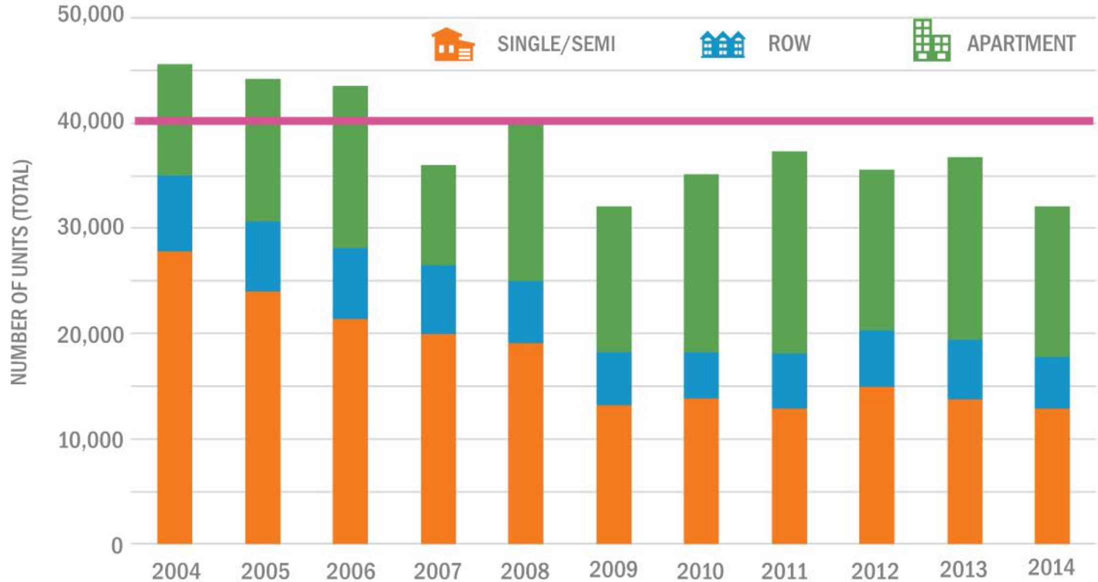
Percent by Unit Type Trend: 2004-2014



Source: CMHC

YEARLY COMPLETIONS

2004-2014



	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
COMPLETIONS	45,542	44,156	43,490	35,961	40,512	32,032	35,089	37,339	35,605	36,782	32,101
CONSTANT	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
DIFFERENCE	5,542	4,156	3,490	-4,039	512	-7,968	-4,911	-2,661	-4,395	-3,218	-7,899

DIFFERENCE 2004-2014: -21,391 UNITS

Source: CMHC

POLL #6

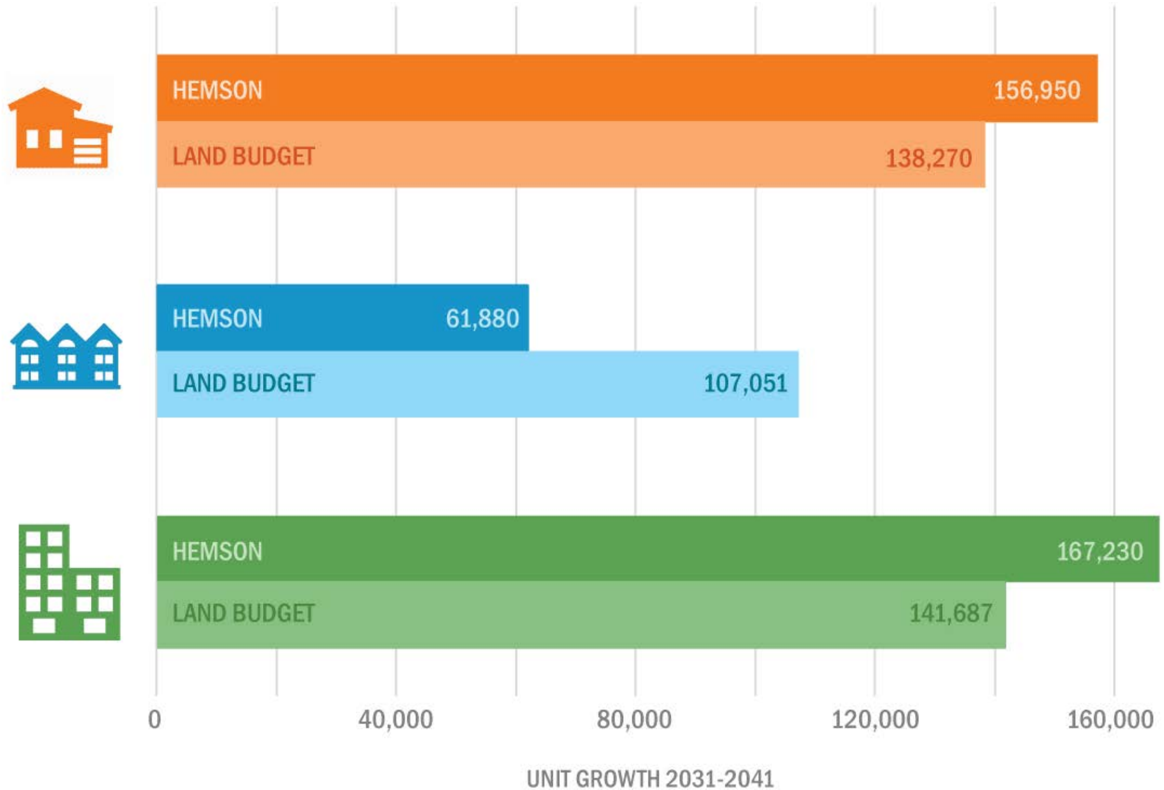
DENSITY

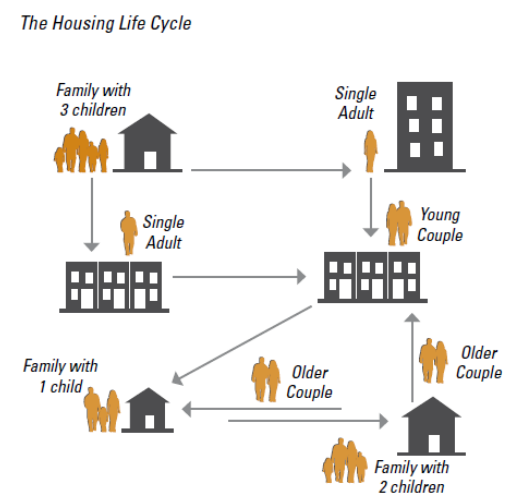
Is the Growth Plan delivering the right type of housing?

- Yes
- No
- I don't know

HEMSON v. LAND BUDGET

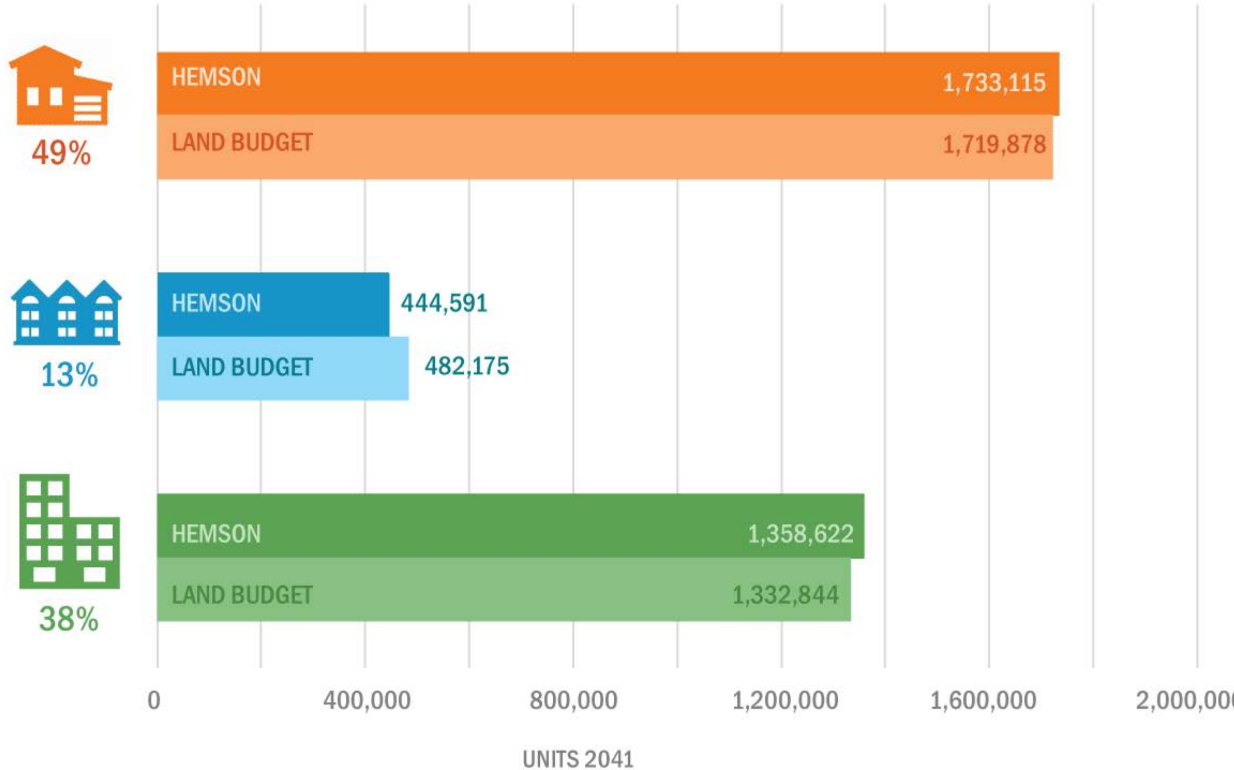
UNIT PROJECTION GROWTH: 2031- 2041





HEMSON v. LAND BUDGET

UNITS 2041



POLL #7

TRAVEL

How do you get to work?

- Single-occupant vehicle
- Multi-occupant vehicle
- Transit
- Walk/Bike

P2G PERFORMANCE INDICATORS

MODAL SHARE IN GREATER GOLDEN HORSESHOE
PERCENTAGE OF DIFFERENT MODES, 2006 AND 2011

ALL TRIPS

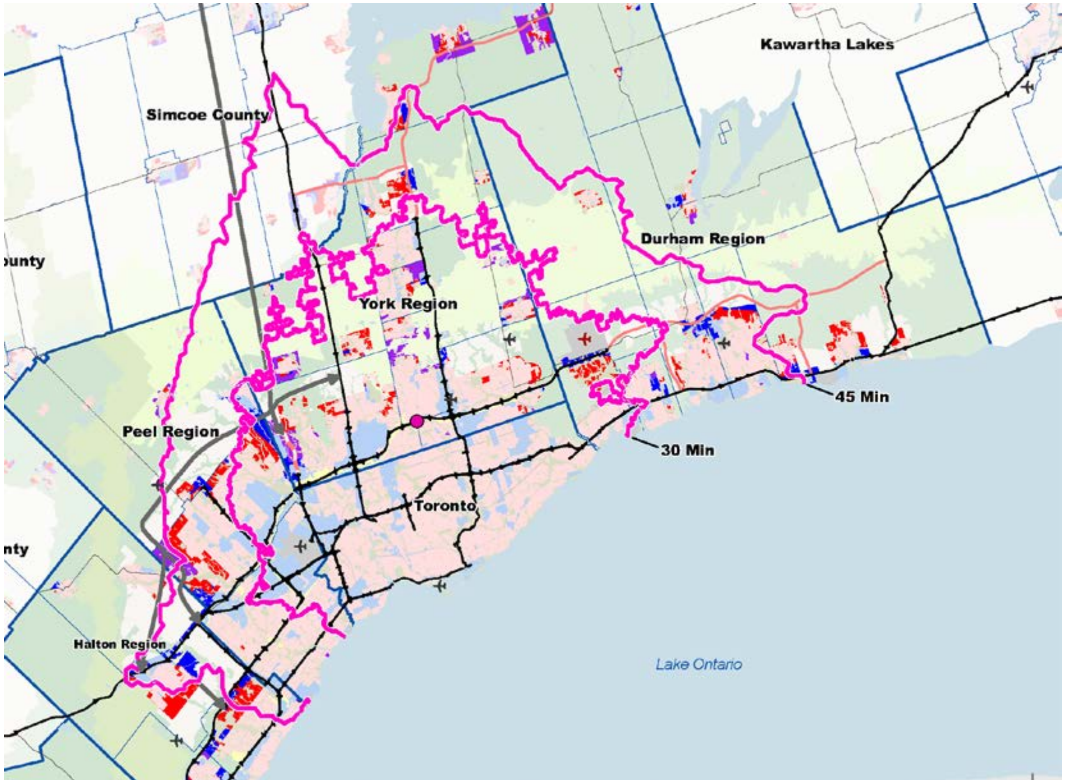
		INNER RING	OUTER RING	ENTIRE REGION
2006	Auto	78%	89%	81%
	Occupants per vehicle	1.253	1.247	1.251
	Transit	13%	2%	10%
	Bicycle	1%	0%	1%
	Walk	6%	4%	5%
	Other	2%	4%	3%
2011	Auto	78%	90%	81%
	Occupants per vehicle	1.256	1.243	1.252
	Transit	14%	3%	11%
	Bicycle	1%	1%	1%
	Walk	5%	3%	5%
	Other	2%	4%	2%

MEDIAN TRIP DISTANCE BY MODE IN GREATER GOLDEN HORSESHOE
DISTANCE IN KILOMETRES, 2006 AND 2011

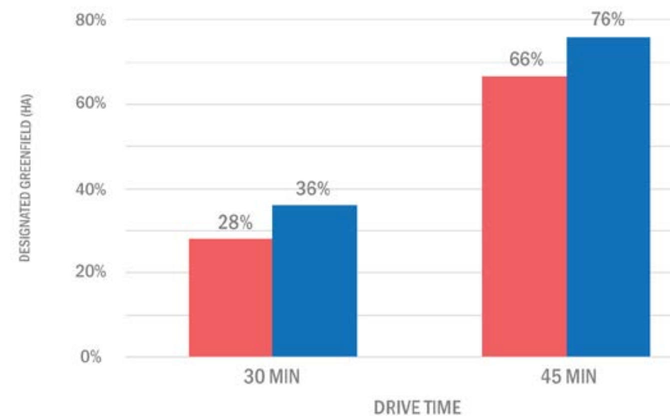
ALL TRIPS

		INNER RING	OUTER RING	ENTIRE REGION
2006	Auto	5.4	4.4	5.1
	Transit	7.2	3.5	6.9
	Bicycle	1.9	1.4	1.8
	Walk	0.7	0.7	0.7
	Other	3.5	4.4	3.8
	TOTAL	5.1	4.0	4.8
2011	Auto	5.3	4.8	5.1
	Transit	8.1	4.3	7.8
	Bicycle	2.0	1.7	2.0
	Walk	0.7	0.7	0.7
	Other	3.7	4.2	3.9
	TOTAL	5.1	4.4	4.9

PRIME MARKET AREAS



GTA 905 GREENFIELDS BY PROXIMITY TO HWY 407/YONGE ST.



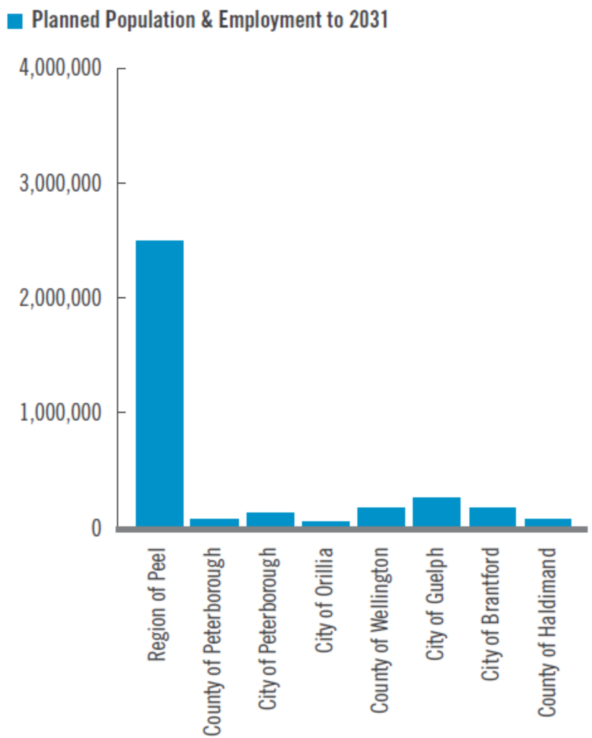
POLL #8

GREENFIELD LAND

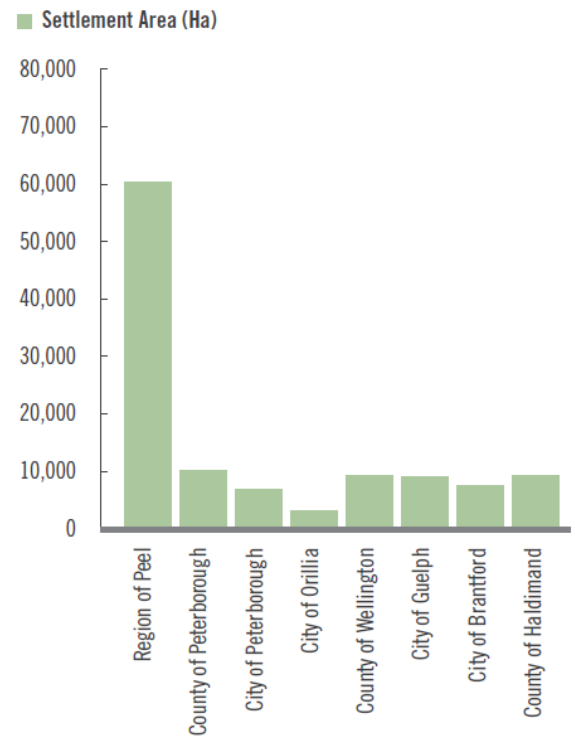
Should Settlement Area Boundaries be expanded to meet growth needs to 2041?

P2G PERFORMANCE INDICATORS

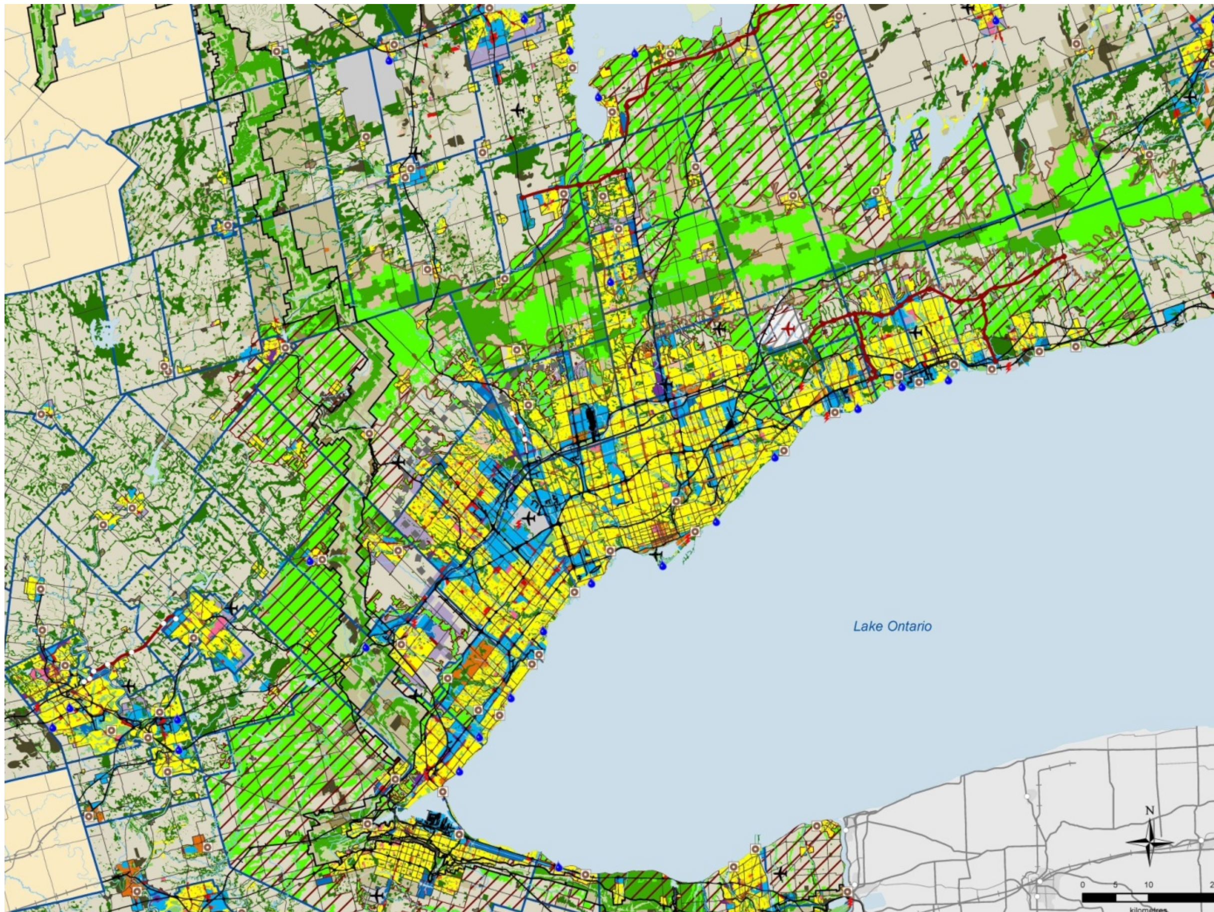
PLANNED POPULATION AND EMPLOYMENT



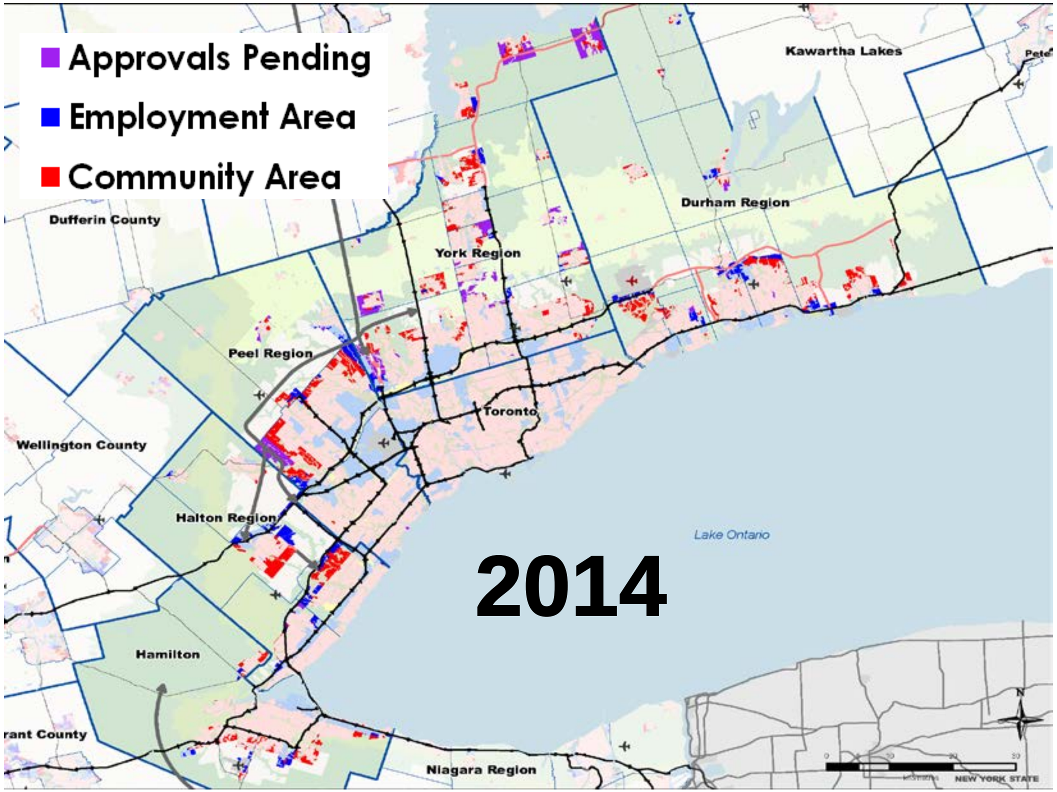
SETTLEMENT AREA

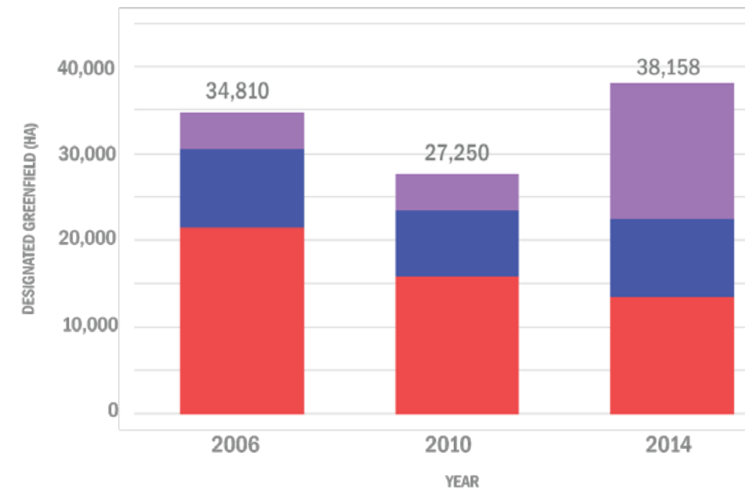


LOWER TIER LAND USE

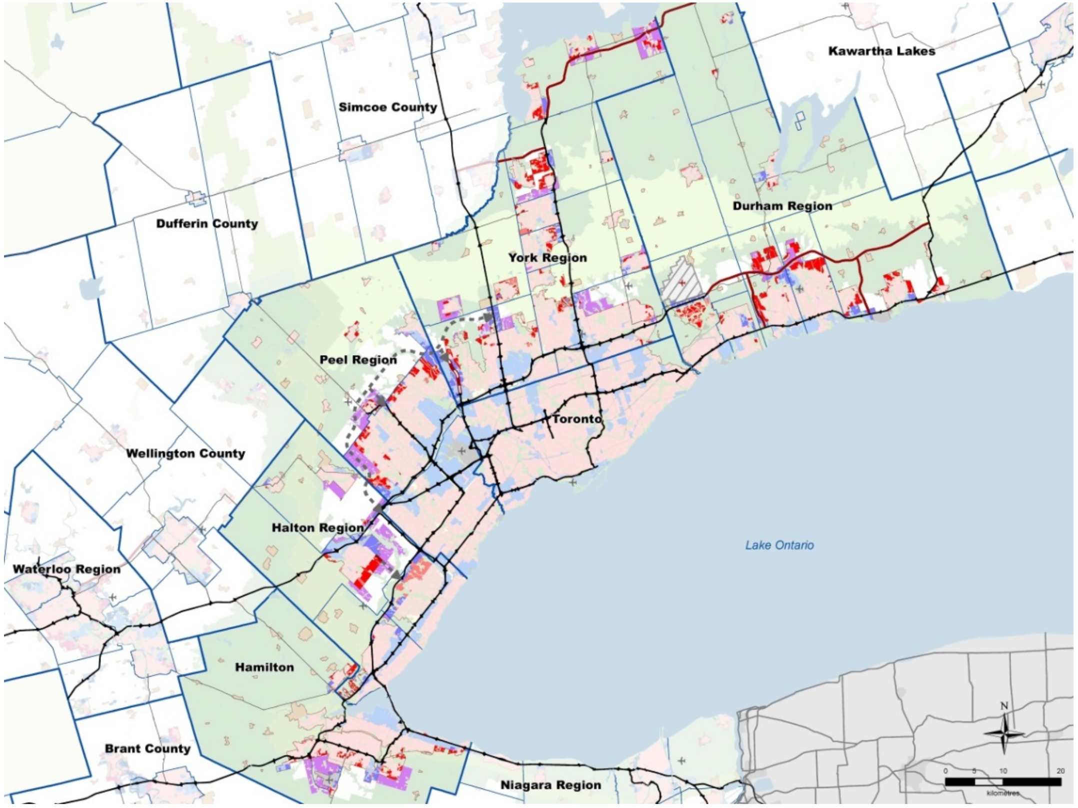


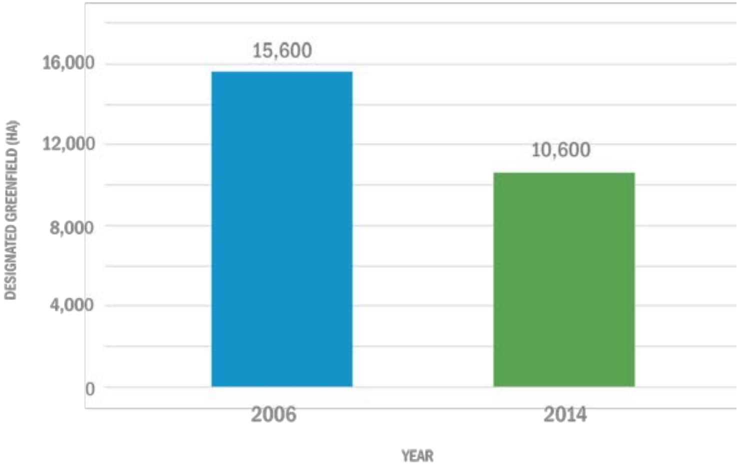
GREENFIELD LAND REMAINING





GREENFIELD: LOW DENSITY RESIDENTIAL





WHITEBELT: ESTIMATED CONSUMPTION

GTAH

CAPACITY (HA) 32,313
ALL LANDS DESIGNATED IN 2032
BUILD OUT 2052

PEEL

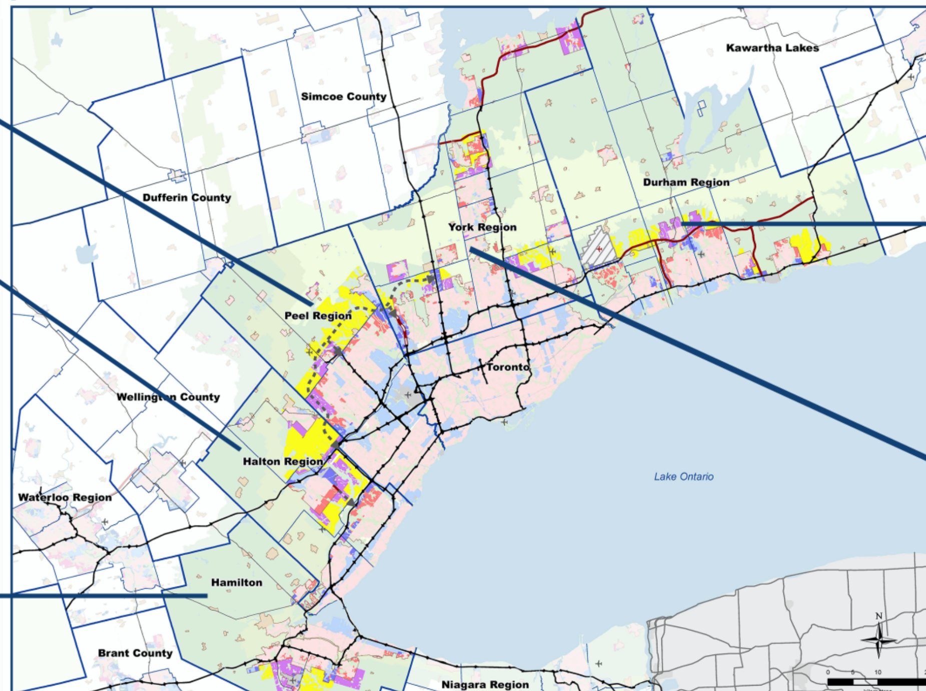
CAPACITY (HA) 8,539
ALL LANDS DESIGNATED IN 2042
BUILD OUT 2062

HALTON

CAPACITY (HA) 9,540
ALL LANDS DESIGNATED IN 2040
BUILD OUT 2060

HAMILTON

CAPACITY (HA) 2,581
ALL LANDS DESIGNATED IN 2046
BUILD OUT 2066



DURHAM

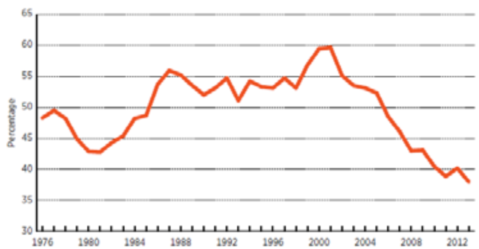
CAPACITY (HA) 6,731
ALL LANDS DESIGNATED IN 2029
BUILD OUT 2049

YORK

CAPACITY (HA) 4,922
ALL LANDS DESIGNATED IN 2024
BUILD OUT 2044

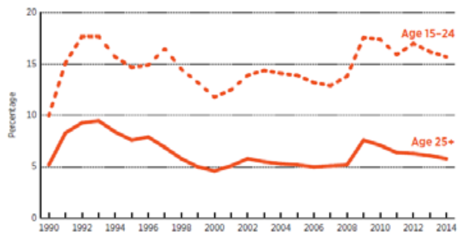
Employment and Migration

Figure 8: Share (%) of Canadian immigration, Ontario, 1976–2014



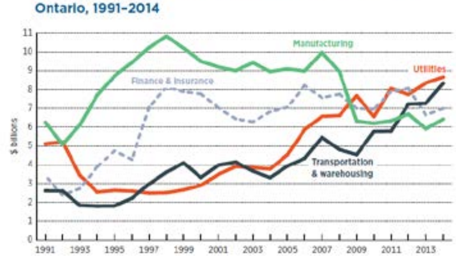
Source: Statistics Canada, CANSIM Table 051-0004: *Components of population growth, Canada, provinces and territories, annual (persons).*

Figure 5: Unemployment rate by age, Ontario, 1990–2014



Source: Statistics Canada, CANSIM Table 282-0002: *Labour force survey estimates (LFS), by sex and detailed age group, annual.*

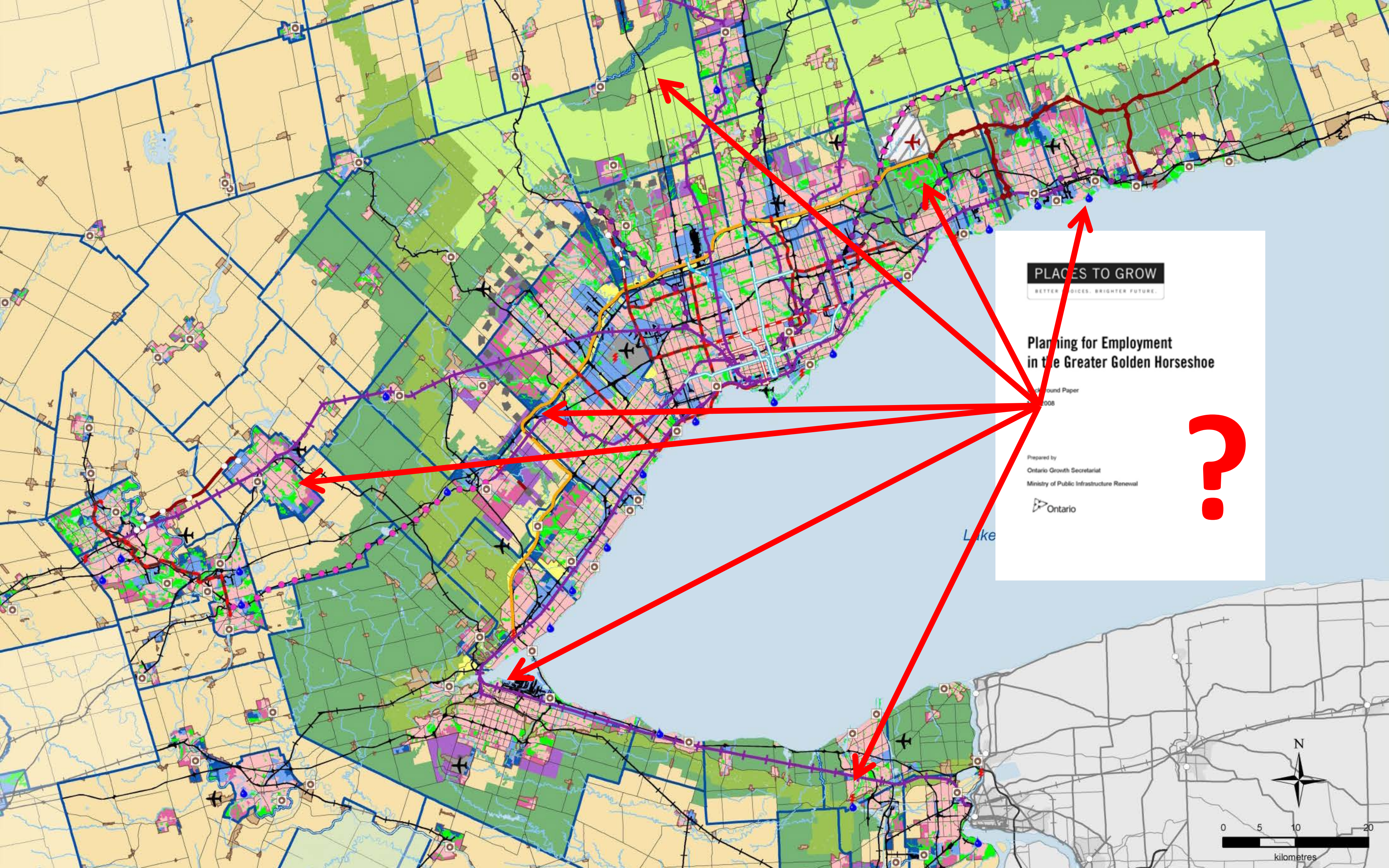
Figure 12: Non-residential business investment ($ billions), Ontario, 1991–2014



Source: Statistics Canada, CANSIM Table 029-0005: *Capital and repair expenditures, by sector and province, annual (dollars x 1,000,000)(1,2): Capital and Repair Expenditures, Actual, Preliminary Actual and Intentions - 2803.*

'If growth had been sustained at 11.5%, there would have been 136,185 more people in Ontario in 2014, almost exactly equal to the net migration to other provinces of 133,167 people. **So the slowdown in population growth is directly attributable to people voting with their feet and moving to other provinces or immigrants bypassing Ontario altogether**.'

Source: Fraser Institute Report, Ontario No Longer a Place to Prosper, October 2015


PLACES TO GROW
Planning for Employment
in the Greater Golden Horseshoe
Prepared by
Ontario Growth Secretariat
Ministry of Public Infrastructure Renewal
Ontario
?
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0 5 10 20
kilometres

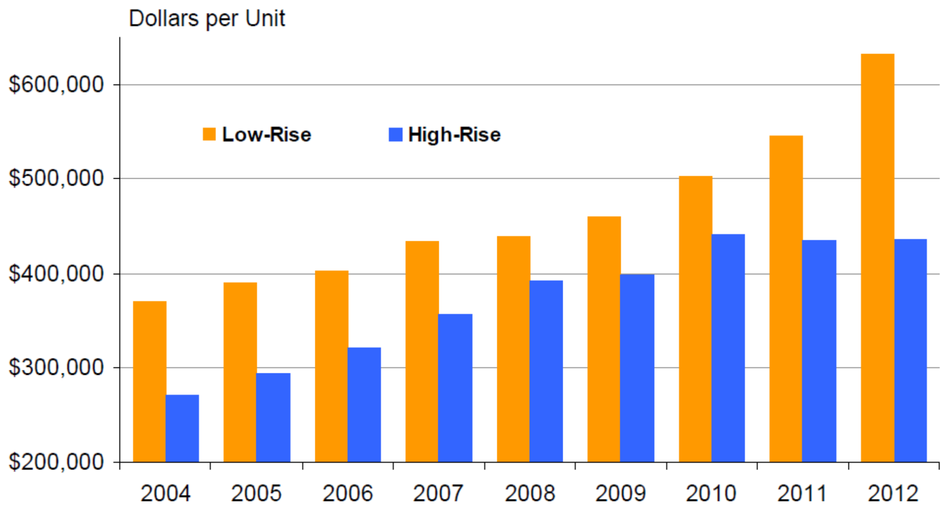
POLL #9

AFFORDABILITY

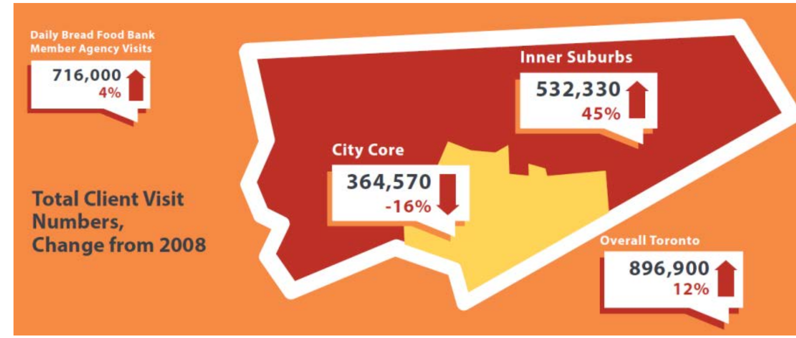
What is the average home price in the GTA?

AVERAGE NEW HOME PRICES - GTA

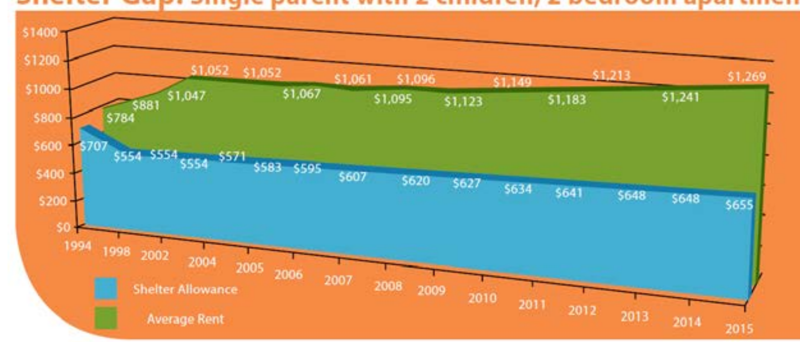
Average New Home Price, Low-Rise and High-Rise, 2004-2012



Source: Altus Group Economic Consulting based on Realnet data



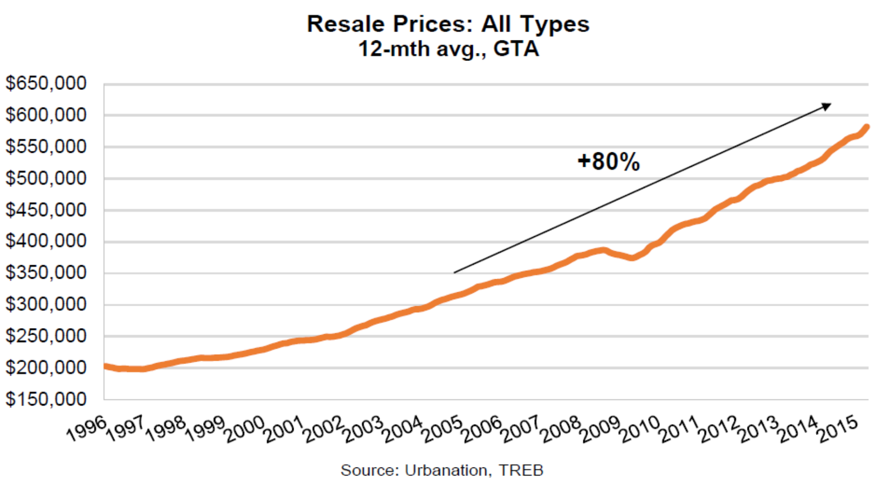
Shelter Gap: Single parent with 2 children, 2 bedroom apartment

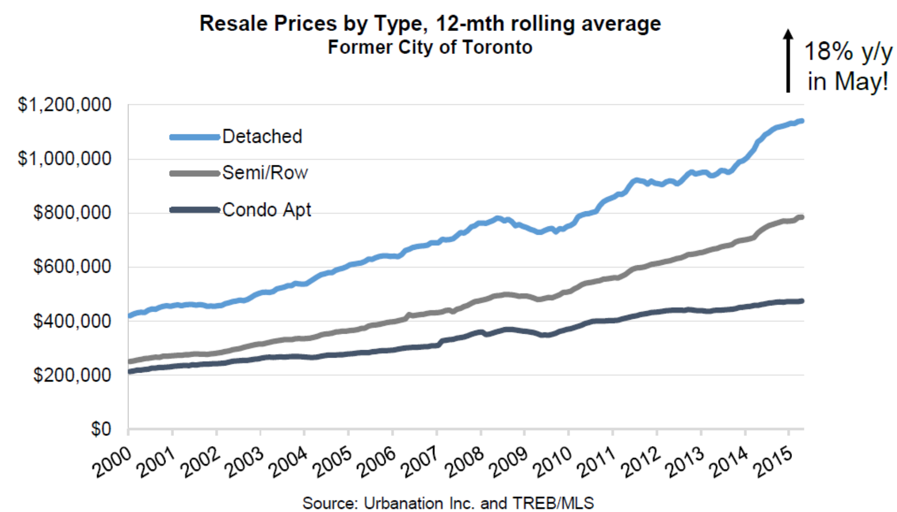


Source: Adapted from Pay the Rent Feed the Kids, "Raising the Shelter Allowance: Evaluating Income Geared to Rent in Toronto", 2002. Source data from Canada Mortgage and Housing Corporation, Rental Market Survey Reports, and Ontario Ministry of Community and Social Services

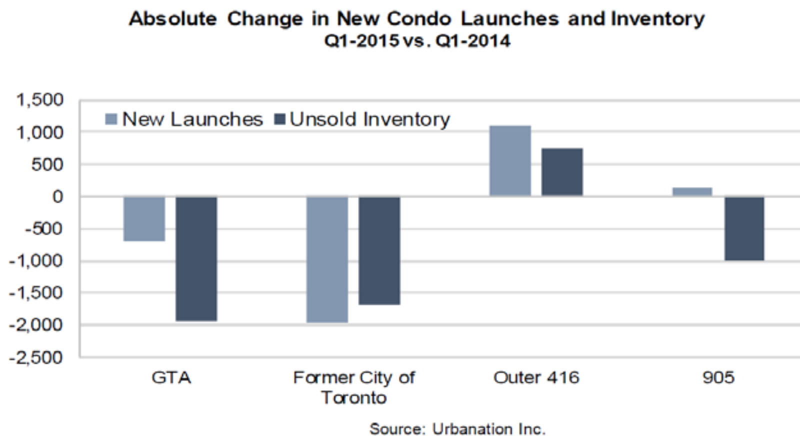
RESALE PRICES

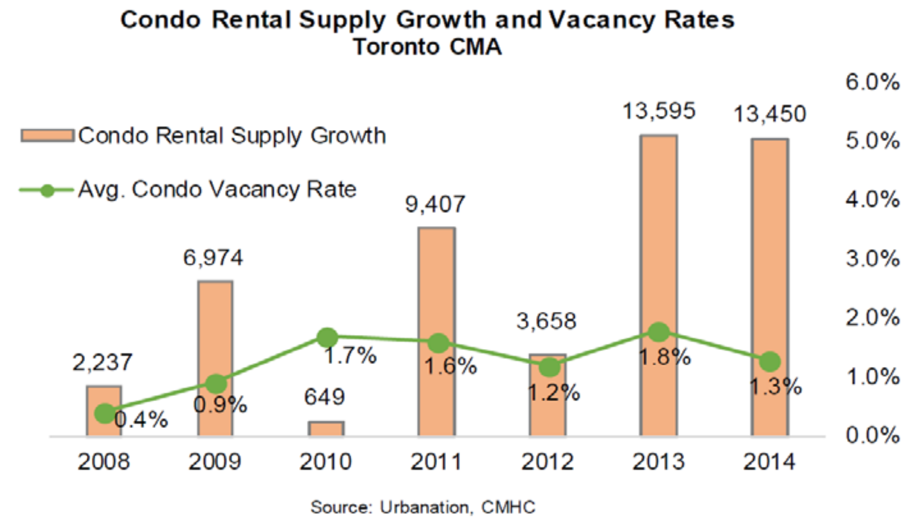
FORMER CITY OF TORONTO





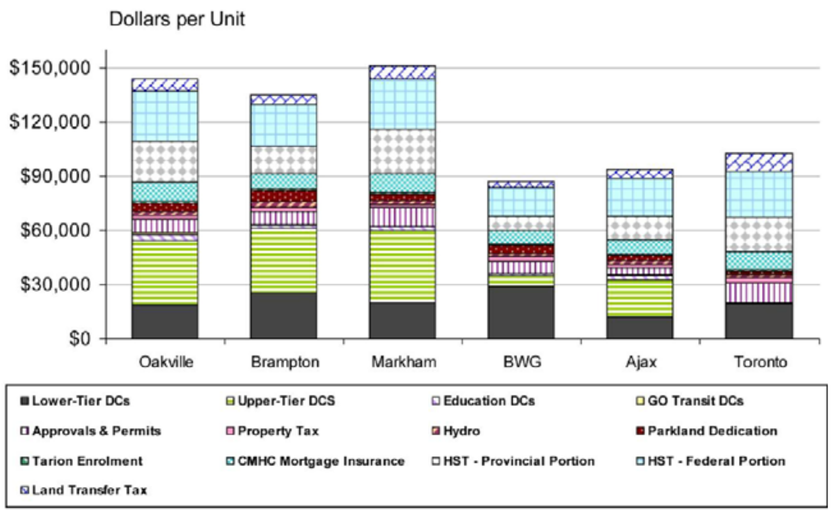
GTAH CONDOMINIUM



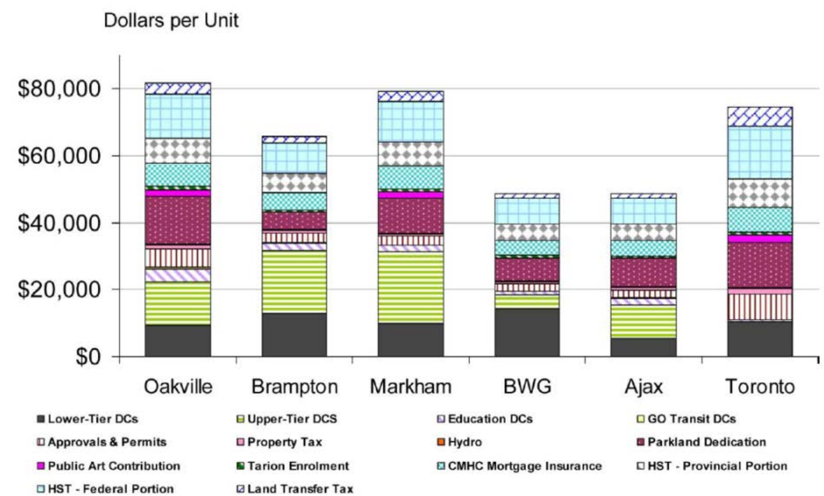


GOVERNMENT CHARGES FOR DEVELOPMENT

Government Charges per Home, by Type of Cost, Low-Rise Development, Selected GTA Municipalities



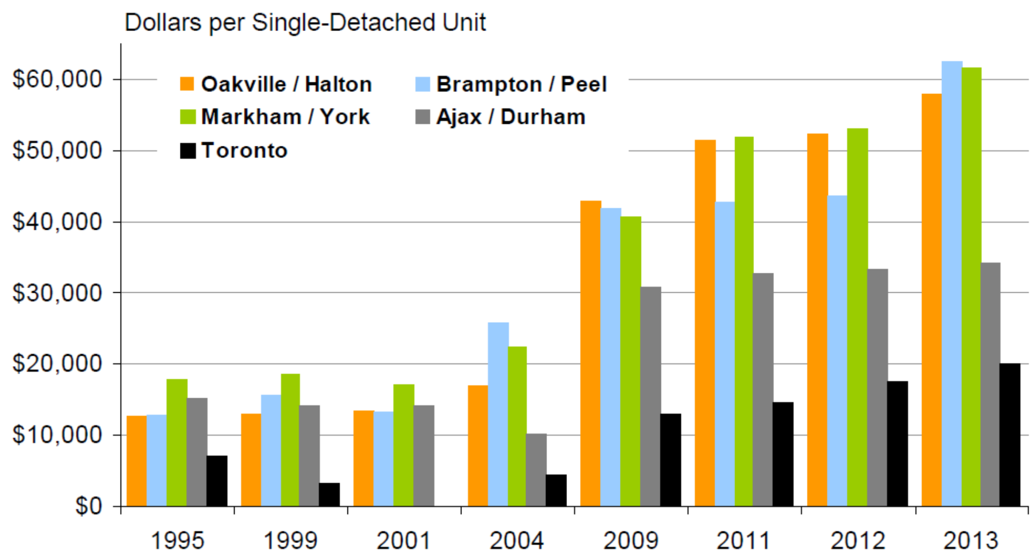
Government Charges per Apartment, by Type of Cost, High-Rise Development, Selected GTA Municipalities



Source: BILD Backgrounder: Government Charges and Fees on New Homes in the GTA Report, July 23, 2013 BILD and Altus

GOVERNMENT CHARGES FOR DEVELOPMENT

Development Charges per Single-Detached Home, Selected GTA Municipalities



Note: Data for Bradford West Gwillimbury not shown as data for several of the years prior to 2009 was not available

Source: Altus Group Economic Consulting

Source: BILD Backgrounder: Government Charges and Fees on New Homes in the GTA Report, July 23, 2013 BILD and Altus

AVERAGE NEW HOME PRICES - GTA

MCAP

LOT VALUES

For the Period Ending June 5, 2015

	PRODUCT TYPE	20 F.F. FREEHOLD TWH	30 F.F. to 36 F.F.	40 F.F.	50 F.F.
YORK REGION	RICHMOND HILL	$17,300 - $17,500	$12,500 - $12,700	$11,600 - $11,800	$11,000 - $11,200
	MARKHAM	$17,700 - $17,900	$12,700 - $12,900	$11,800 - $12,000	$11,400 - $11,600
	WOODBRIDGE	$15,600 - $15,800	$11,500 - $11,700	$11,300 - $11,500	$11,800 - $12,000
	EAST GWILLIMBURY	$9,000 - $9,200	$8,200 - $8,400	$7,300 - $7,500	$6,700 - $6,900
PEEL REGION	BRAMPTON	$8,500 - $8,700	$7,500 - $7,700	$7,200 - $7,400	$8,000 - $8,200
DURHAM REGION	AJAX	$7,500 - $7,800	$7,800 - $8,000	$7,000 - $7,200	$6,200 - $6,400
	WHITBY	$7,200 - $7,400	$6,200 - $6,400	$6,400 - $6,600	$6,200 - $6,400
	OSHAWA	$4,300 - $4,500	$4,200 - $4,400	$3,800 - $4,000	$3,600 - $3,800
HALTON REGION	OAKVILLE	$13,000 - $13,300	$10,600 - $10,800	$10,400 - $10,600	$10,500 - $10,700
	MILTON	$8,700 - $8,900	$7,600 - $7,800	$7,300 - $7,500	$6,200 - $6,400
OUTSIDE GTA	KW	$4,800 - $5,000	$5,300 - $5,500	$4,700 - $4,900	$4,700 - $4,900
	BARRIE / INNISFIL	$4,200 - $4,400	$4,100 - $4,300	$3,800 - $4,000	$3,600 - $3,800
	BRADFORD	$7,100 - $7,300	$6,200 - $6,500	$6,200 - $6,500	$5,600 - $5,800

*Values include all levies except educational

MCAP

HIGH RISE CONDOMINIUM LAND VALUES

For the Period Ending June 5, 2015

SUB-MARKET	LOW $ / SF	HIGH $ / SF	MARKET VALUE $ / SF
DOWNTOWN WEST	$60	$130	$67 - $75
DOWNTOWN EAST	$55	$100	$65 - $73
DOWNTOWN CORE	$85	$140	$110 - $115
TORONTO WEST	$50	$85	$55 - $62
TORONTO EAST	$45	$85	$60- $67
BLOOR YORKVILLE	$90	$170	$135 - $145
NORTH TORONTO	$70	$120	$90 - $95
NORTH YONGE CORRIDOR	$50	$100	$65 - $70
HWY. 7 / YONGE CORRIDOR	$30	$55	$40 - $45
VAUGHAN	$30	$50	$35 - $40

*Values based on Gross Buildable SF

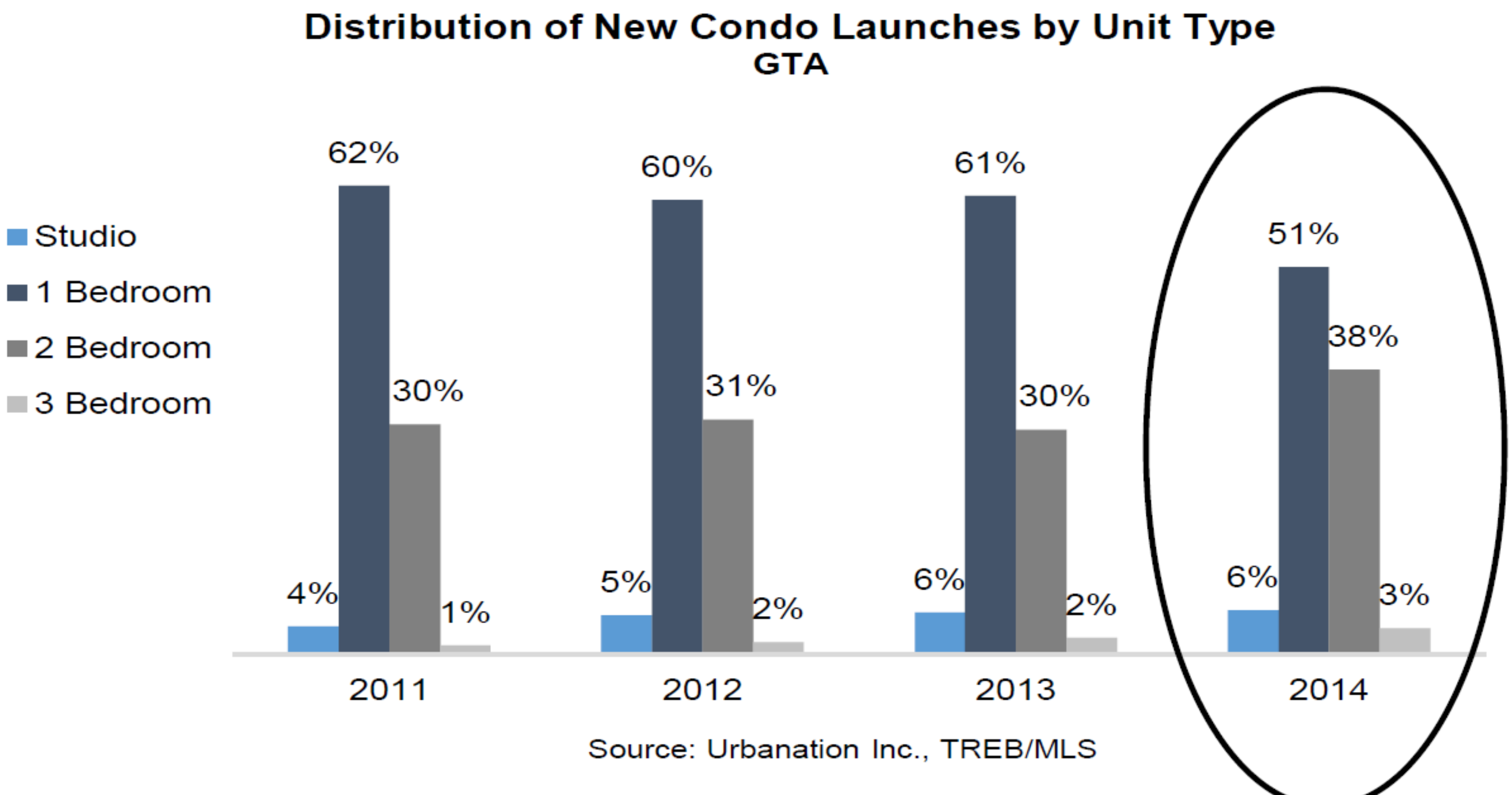
POLL #10

CONDO MARKET

What percentage of condo units built in the last four years are “Family-Oriented” (2+ Bedrooms)?

- 0%
- 30%
- 40%
- 60%

DISTRIBUTION OF CONDO LAUNCHES



AFFORDABILITY

MARKHAM – 3 BED/3 BATH

SINGLE DETACHED

2,000 ft^2
Asking: $699,000
$350/$ft^2$

TOWNHOUSE

1,993 ft^2
Asking: $589,000
$295/$ft^2$

APARTMENT

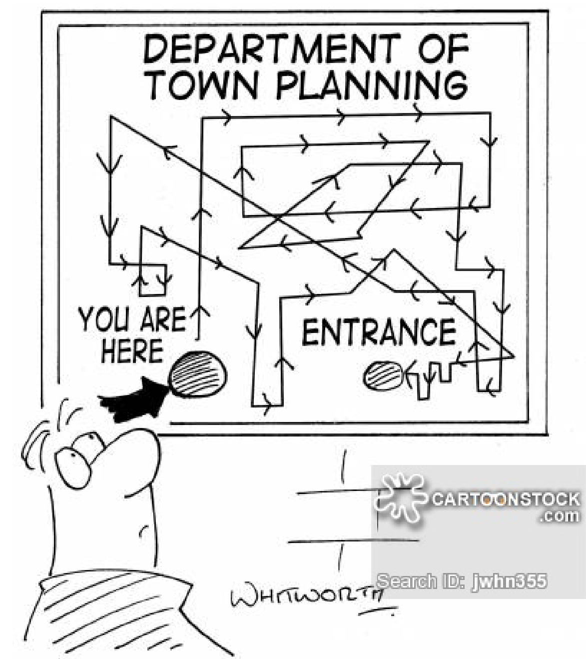
1,855 ft^2
Asking: $689,000
$371/$ft^2$

POLL #11

APPROVALS

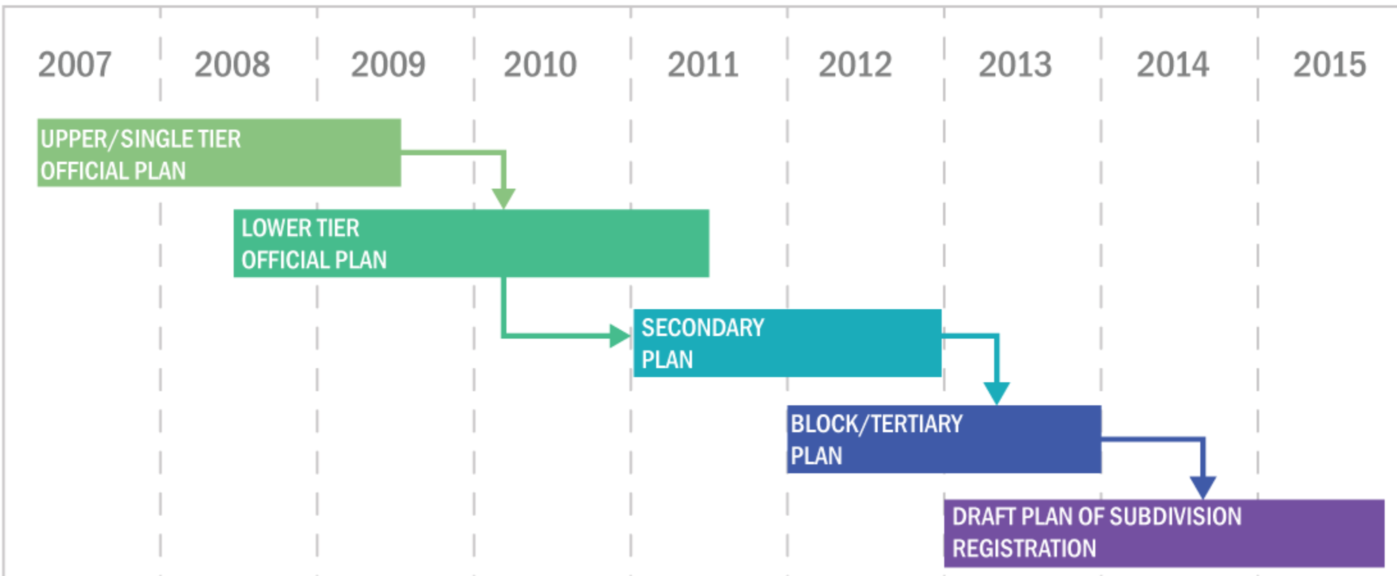
How long has it taken GTAH municipalities to achieve conformity with the Growth Plan since 2006?

- 2009 (3 years)
- 2010 (4 years)
- 2012 (6 years)
- Still not done (9+ years)



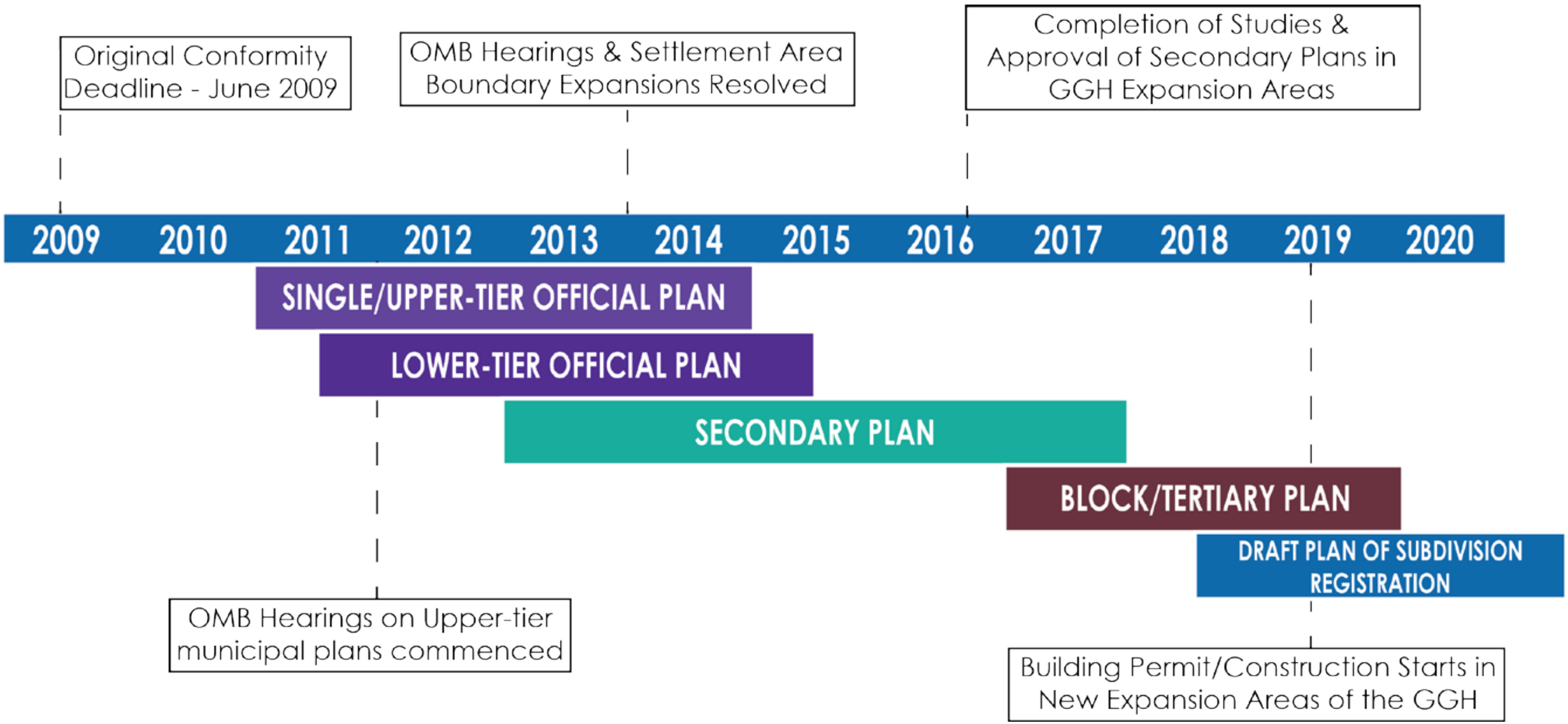
TIMING FOR NEW COMMUNITY AREAS

MGP OUTLOOK - 2008

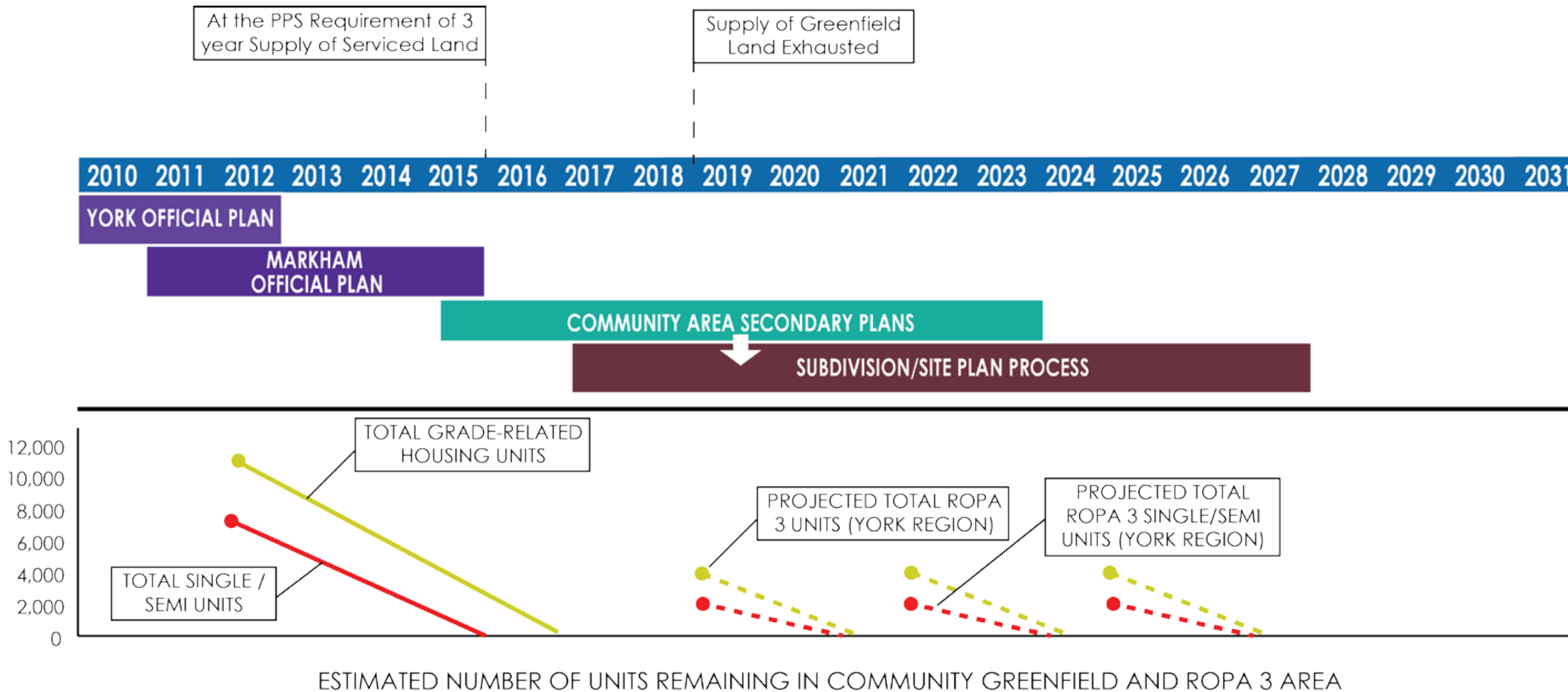


TIMING FOR NEW COMMUNITY AREAS

MGP OUTLOOK - 2008



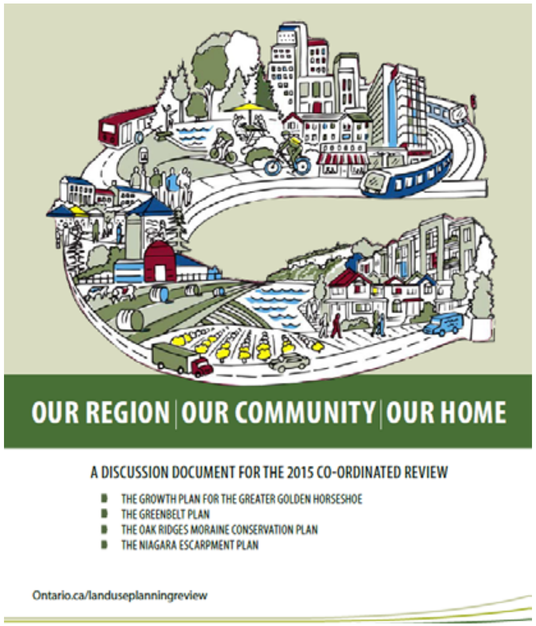
POTENTIAL GAPS IN SINGLE/SEMI SUPPLY



POLL #12

APPROVALS

What's the most important aspect to focus on in the review of the Growth Plan?



IMMEDIATE ISSUES AND SOLUTIONS

Issue	Solution
Incremental Planning and Constrained Greenfield Supply	Longer-Term Planning Horizon
Few Remaining Easy Intensification Opportunities	Revisit Parkland Requirements, Section 37, Transit Delivery, Stable Neighbourhoods and Compatibility
Development (including land) Costs Spiraling Out of Control	More Efficient/ Less Onerous Approvals Process to Attract Investment
Outdated Employment Areas and Business Parks	Permission of Mixed Use employment-first areas

LONG TERM CHALLENGES TO PLANNING IN THE GGH

1. 50 Year Infrastructure Driven Outlook for the GGH
2. Integrated Infrastructure Strategy including Highways, Transit (Metrolinx), Active Transportation Networks, Water and Wastewater Servicing, Energy, Health Care, Airports
3. Sustainability Strategy and Indicators
4. Intensification Strategy, including standards for social services and soft infrastructure
5. Detailed Housing strategy matching demographics to housing supply and addressing affordability
6. GTAH "Inner Ring" Natural Heritage System based on an urban lens
7. Performance Measures and methodology for implementation of the growth plan
8. Fiscal Impact modeling of growth scenarios to rationalize the plan
9. Standardization of Land Use Planning: Open Source GIS Data and Uniform Land Use Designations/Policies

LETS GO BLUE JAYS!