Report to Planning and Environment Committee

To: Chair and Members
Planning and Environment Committee
From: Scott Mathers, MPA, P.Eng.
Deputy City Manager, Housing and Community Growth
Subject: 2024 Annual Development Report
Date: February 19, 2025

Recommendation

That, on the recommendation of the Director, Planning and Development, the 2024 Annual Development Report, attached as Appendix "A", **BE RECEIVED** for information.

Executive Summary

The Annual Development Report provides a yearly update and commentary on development activity in the City of London, which is a companion to monthly and seasonal updates. The Annual Development Report monitors historic and projected near-term growth of residential, commercial, institutional and industrial development; development application statistics; and Planning and Development process improvement initiatives.

The 2024 Annual Development Report is the sixth annual report prepared by the City and is attached as Appendix A.

The 2024 year demonstrated a rebound in permits from a low year in 2023. This 2024 increase included strong levels of applications and Council approvals, and a significant year-to-year increase in overall housing units and non-residential permits. Units demonstrate a continued trend away from low-density residential (singles) and trend towards medium-density and high-density housing forms. While this results in an overall increase in permits for new housing, the number of units and splits between unit type show a shortfall compared to projections. The health of Development Charges (DCs) reserve funds and finance to support new growth such as infrastructure is based on projections, so continued monitoring will be required. More detail on DCs reserve funds will be included in a report from Finance to Council in Q2.

The City also surpassed the Federal Housing Accelerator Fund (HAF) housing target and continues to advance the Roadmap to 3,000 Affordable Housing Units.

Linkage to the Corporate Strategic Plan

The Annual Development Report supports the 2023-2027 Strategic Plan for the City of London through the Housing and Homelessness strategic area of focus by developing and enhancing planning implementation tools that advance the polices of The London Plan and increasing the efficiency and consistency of planning and development processes.

Background

On June 17, 2019, a staff report recommending that a regular reporting tool to communicate development statistics and progress on continuous improvement initiatives be developed and published on an annual basis was submitted to the Planning and Environment Committee. The recommendation was approved by Council.

Previous Annual Development Reports for 2019 through 2023 have been submitted to Planning and Environment Committee.

Similar to previous years, the attached 2024 Annual Development Report covers historic and projected near-term growth by development type, 2020-2024 development application activity, and continuous improvement initiatives that were taken in 2024, as well as the percentage of new residential units located within the Built-Area Boundary.

This report also provides an update on the Roadmap to 3,000 Affordable Units Plan by 2026 and the City's Housing Pledge for 47,000 new units by 2031. The City also secured $74 million from federal Housing Accelerator Fund (HAF) on September 13, 2023 to accelerate delivery of those housing units.

On April 16, 2024, the Targeted Actions to Increase London's Housing Supply: Supporting Council's Pledge for 47,000 Units by 2031 was brought forward to the Strategic Priorities and Policy Committee identifying the actions, timelines, development tracking and reporting methods associated with different categories of housing units. It provides the number of units in the various stages of land development and planning application processes as of December 31, 2023. In the 2024 Annual Development Report, the diagram of "buckets" of units in various development approval stages has been updated with current information (December 2024), and is applied as a key performance metric that can be monitored over time. Unit counts in the "Un-serviced" and "Serviced" stages are an estimate of the number of units from annual updates to the Growth Management Implementation Strategy (GMIS), and therefore are not included in the Annual Development Report.

On July 15, 2024, a staff report entitled "Update to the Roadmap to 3,000 Affordable Units: Roadmap 2.0" was brought forward to the Community and Protective Services Committee. The report recommends using the Housing Accelerator Fund to expand the programs and activities under the Roadmap to 3,000 to allocate $10 Million to the Roadmap projects and $10 Million for highly supportive housing units. Reporting on progress towards the City's affordable housing goals was also simplified to focus on units available for rent and units available for purchase. These categories are further broken down into City-Led Shovel Ready Developments and Community-Led Developments for funding and tracking purposes.

Key Findings

In 2024, total new housing units were up 114% in the City over 2023. This includes meeting the first year housing target of the Federal HAF, as identified in the December 10, 2024 report to Strategic Priorities and Policy Committee. Of the 3,000 new residential units in 2024, 9% were single detached and semi-detached dwellings, 17% were rowhouses and townhouses and 74% were apartments. In addition, permits for 434 new Additional Residential Units (ARUs) were issued in 2024, which represent a 67% increase in the number of ARUs from 2023. Furthermore, there were 266 additional housing units with permits issued in commercial and institutional developments, making the total of 3,700 housing units created through the issuance of building permits in the year.

The 2024 residential permit activity demonstrates the continuation of the recent trend towards more medium-density (townhouse) and high-density (apartment) forms of housing being built compared to low-density (singles and semi-detached) units.

Building permits by forms of housing and quantity of units in each type must continue to be monitored closely. Despite an increase in 2024, there is still a misalignment between building permits compared to projected. The number of permits in certain categories, such as Low Density Residential (LDR, for e.g., single-detached dwellings) is significantly below Council-approved projections. The projected amount of LDR units in 2024 was 958 units. The realized amount was 270 units, for a difference of 688 units. Over the past 3 years, the LDR category is deficient by 1,794 units.

This demonstrates the trend towards more medium-density and high-density housing, but also demonstrates potential impacts on the health of Development Charges (DCs) reserve funds because higher-density forms of housing do not collect the same amount of DCs through building permit. City budgeting for growth projects is also based on Council-approved growth projections.

The ability for the City to facilitate new growth is based on collection of DCs because they are in turn used to pay for capital projects that support new growth, such as stormwater management ponds and wastewater (sewer) pipes. Figure 1, below, shows the difference between the last five years of actual units in building permits versus the Council-approved projections that are the basis for budgeting (also included on page 3 of Appendix A, attached). This figure reinforces the trend towards more medium-density and high-density housing and less low-density housing development. Additional reporting on the associated impacts to DCs revenues and DCs reserve funds will be provided to Council in the second quarter of 2025, as part of the 2024 annual report on Development Charges Reserve Funds and Development Charges Monitoring.

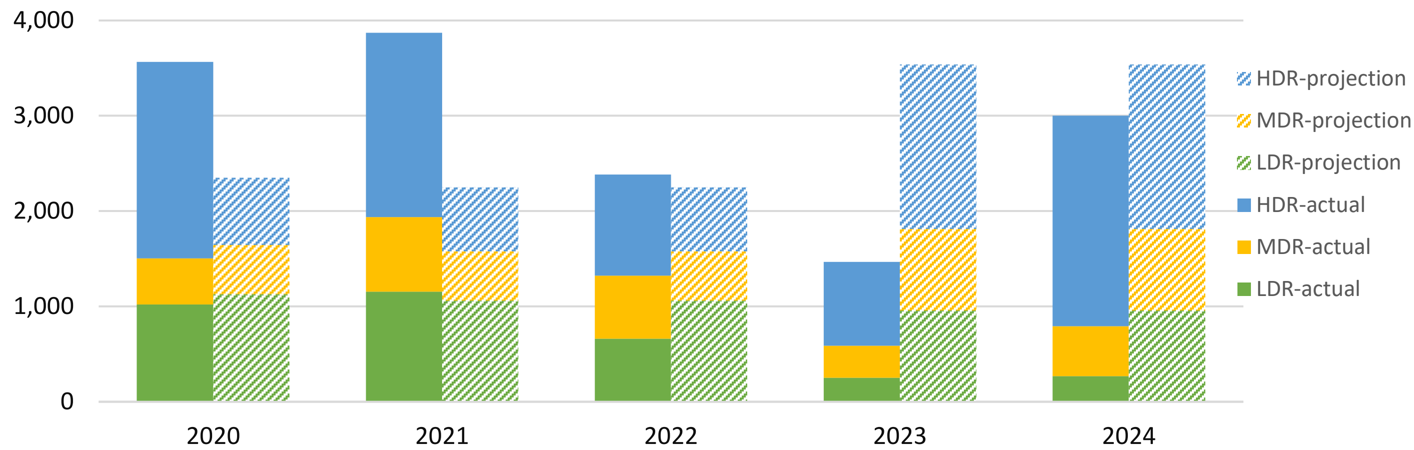

Figure 1: 5-year Average: New Units in Actual Permits versus Council-approved Growth Projections

This report uses the Council-approved growth projections (December 2022) to evaluate development performance. The Council-approved growth projections are separate from the Ministry of Finance (MOF) projections used for the purposes of the Land Needs Assessment. The Provincial Planning Statement 2024 directs use of MOF projections for land use purposes; however, the Council-approved projections of the Annual Development Report are to be applied to Development Charges Act-related matters, including DCs revenues and budgeting for capital growth. The MOF projections are significantly higher as well. For comparative purposes, the 2024 MOF and Council-approved projections for Low Density Residential are 2,716 units and 958 units respectively. The 2024 actual LDR builds were 270. So the difference between actuals and projected changes from a deficiency of 688 units (under Council-approved) to a deficiency of 2,446 LDR units (under MOF) in 2024. This highlights the potential budget implications and misalignment of MOF projections, as well as the need for ongoing monitoring of building permits versus projected unit numbers and unit types.

In tracking progress towards achieving the Housing Pledge of 47,000 new units, there have been a total of 10,475 residential units created by the end of 2024 (1,775 units pre-2022 housing starts, 2,907 units in 2022, 1,729 units in 2023, and 4,064 units in 2024), noting that this includes housing units counted as pre-2022 by CMHC. From low permits experienced in 2023, Council approvals of projects going through the planning and development approval process have increased remarkably in 2024. Since January 2022, Council has approved 32,657 units through site-specific zoning by-law amendments and draft approved subdivision plans. In 2022 and 2023, Council approved zoning for 9,084 units through site-specific zoning by-law amendments and 683 units in draft approved subdivision plans. In 2024, Council approved zoning for 6,006 units through site-specific zoning by-law amendments and 16,884 units in draft approved subdivision plans. This includes the approval of an approximate total of 8,400 new residential dwelling units on the former London Psychiatric Hospital lands and the approval for development of approximately 3,817 new residential units at 323 Oxford Street West, 92 and 825 Proudfoot Lane.

Additionally, 4,986 residential units were in registered subdivisions as individual building lots or multi-unit blocks, as of the end of 2024.

The intensification rate which means new units created within the 2016 Built-Area Boundary as identified in The London Plan was 46.8% in 2024. After a very low level in 2022, the intensification rate increased due to greater high density residential (i.e. apartments and other multi-unit dwellings) units being located within the Built-Area Boundary.

Non-residential development has rebounded from lows experienced in 2023, with industrial growth up 130% in 2024, boosted by permits for new manufacturing plants, industrial warehouses, and additions to existing buildings. Commercial growth was up 99% from the development of retail plazas, offices and restaurants. Institutional growth was up 123%, mainly driven by the expansion and additions of schools and university facilities. Similar to residential, the increase in non-residential development is positive; however, it remains below the Council-approved growth projections and is associated with lower-than-expected DC revenues.

Since the inception of the Roadmap to 3,000 Affordable Units Plan in 2021, a total of 2,139 affordable housing units have been tracked up to the end of 2024. Through partnerships with developers and local community, the City has constructed or contributed to the construction of 540 affordable housing units, which have been occupied by tenants seeking lower cost rental housing. The City has started or guided construction of 716 affordable housing units, and engaged in the project scoping and planning process for 883 affordable housing units. Future opportunities for 861 units by 2026 are being assessed and explored.

Of the 600 Highly Supportive Housing units targeted by 2027, 222 units were attributed through the Housing Accelerator Fund investments. As of December 31, 2024, 93 units have occupancy granted while 50 units are in planning. Roadmap progress in this document is updated to follow the standardized reporting format recommended in the Roadmap 2.0 report.

Development application activity levels remained stable in 2024. A total of 410 applications were received. Of those applications received, 167 site-specific rezoning and site plan applications proposed for creation of 6,375 residential units.

In addition, many process improvement initiatives are underway to improve service delivery and application processing times. Various changes and improvements to application processes have been implemented in response to Provincial legislative changes, streamlining processes and file handling, utilizing digital platforms and initiating transformation. Several types of applications have seen improvements in average processing time, such as Minor Variance, amendments to The London Plan, and especially Zoning By-law Amendments.

Conclusion

The attached 2024 Annual Development Report provides a summary of historic and projected near-term growth of residential and non-residential development, 2020-2024 development application activity, and continuous improvement initiatives that were undertaken in 2024, as well as updates on affordable housing units and residential units in development approval stages.

Staff anticipate that the Annual Development Report will be a helpful monitoring tool for Council as well as a reference for market analysis studies undertaken by members of the community. It will also provide an enhanced input into the Growth Management Implementation Strategy (GMIS) and recommendations for infrastructure planning. Noting that the requirement for ongoing monitoring of actual units versus projections is required because of the impact on DCs reserves and reserve funds ability to finance new growth infrastructure construction.

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Appendix A

2024 ANNUAL DEVELOPMENT REPORT

PLANNING & DEVELOPMENT

The City of London

London
CANADA

2024 Annual Development Report

The Annual Development Report (ADR) provides updates and commentary on development activity in the City of London. The ADR monitors:

- residential, commercial, institutional and industrial development;
- affordable housing unit supply;
- residential units in various stages of the development approval process;
- development application statistics; and
- Planning and Development process-based continuous improvement initiatives.

Highlights in 2024

Change (▲▼) compared to 2023

Residential Development

3,700
Housing Units Issued
▲+114%

270 Single and semi-detached units
▲+14% (**9%** of total 3,000 residential units)

522 Rowhouse and townhouse units
▲+52% (**17%** of total 3,000 residential units)

2,208 Apartment units
▲+155% (**74%** of total 3,000 residential units)

434 New Additional Residential Units (ARUs) ▲+67%

266 Other housing units in commercial/ institutional developments

46.8% Intensification rate (Percentage of residential units located within the Built-Area Boundary)

Non-Residential Development

159,691
m^2 of Gross Floor Area Issued
▲+121%

69,799 Industrial development
▲+130% (**44%** of total gross floor area)

27,635 Commercial (retail and office) development
▲+99% (**17%** of total gross floor area)

62,257 Institutional development
▲+123% (**39%** of total gross floor area)

Affordable Housing

2,139 Affordable Housing Units Tracked up to the end 2024

540 Units built and occupied

883 Units in planning

716 Units in progress

861 Remaining of the 3,000 target

Housing Units in the Development Approvals Process

3,447 Units (2023) & **3,917** Units (2024)

London's Annual Housing Targets for 2023 and 2024

1,725* units permitted in 2023

3,700* units permitted in 2024

*These units are based on building permit data and the Province bases their values on this housing starts information.

Council Approved

5,337 units in 2023

22,890 units in 2024

Approved Lots and Blocks

5,801 units in 2023

4,986 units in 2024

Open Site Plans and Condos

14,598 units in 2023

15,132 units in 2024

Permits and Inspection

1,725 units in 2023

3,700 units in 2024

Development Application Activity

410
applications received

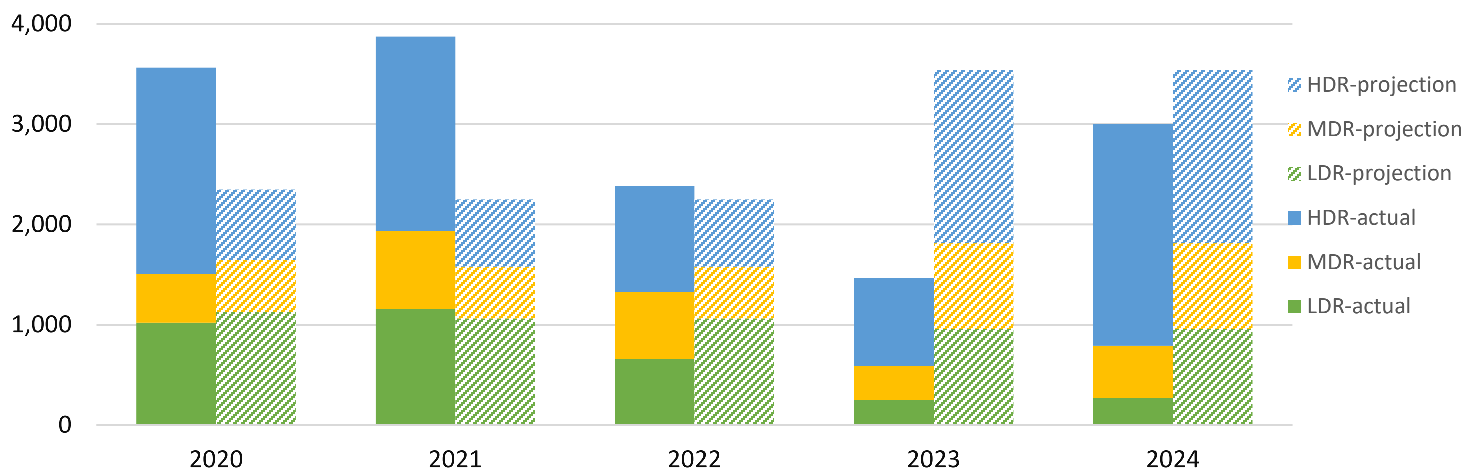
▼ -0.5%

10,882
residential units proposed through applications
(Site-specific Official Plan Amendments and Zoning By-law Amendments, and Site Plans)

	Percentages of Applications Processed within *Planning Act* Timelines	Average Days to Process (In Calendar Days)
Official Plan Amendment and Zoning By-law Amendment	**88%**	**96**
Zoning By-law Amendment	**91%**	**79**
Temporary Zoning	**100%**	**70**
Removal of Holding Provision	**50%**	**68**
Draft Plan of Subdivision	**0%**	**n/a**
Draft Plan of Condominium	**71%**	**83**
Consent	**100%**	**53**
Minor Variance	**95%**	**28**
Site Plan	**100%**	**26**

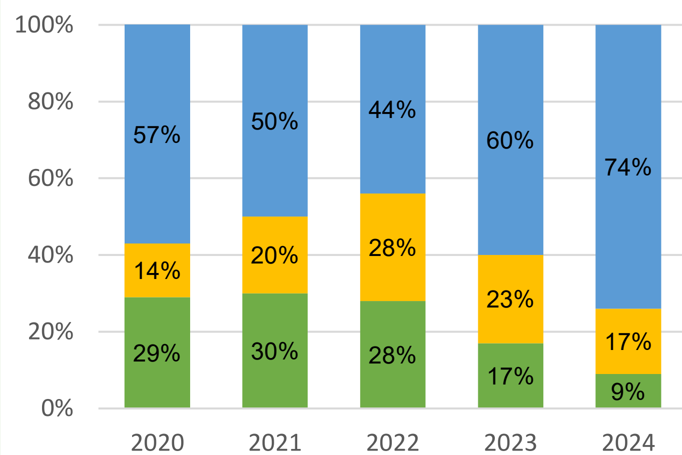
Building Permit Activity

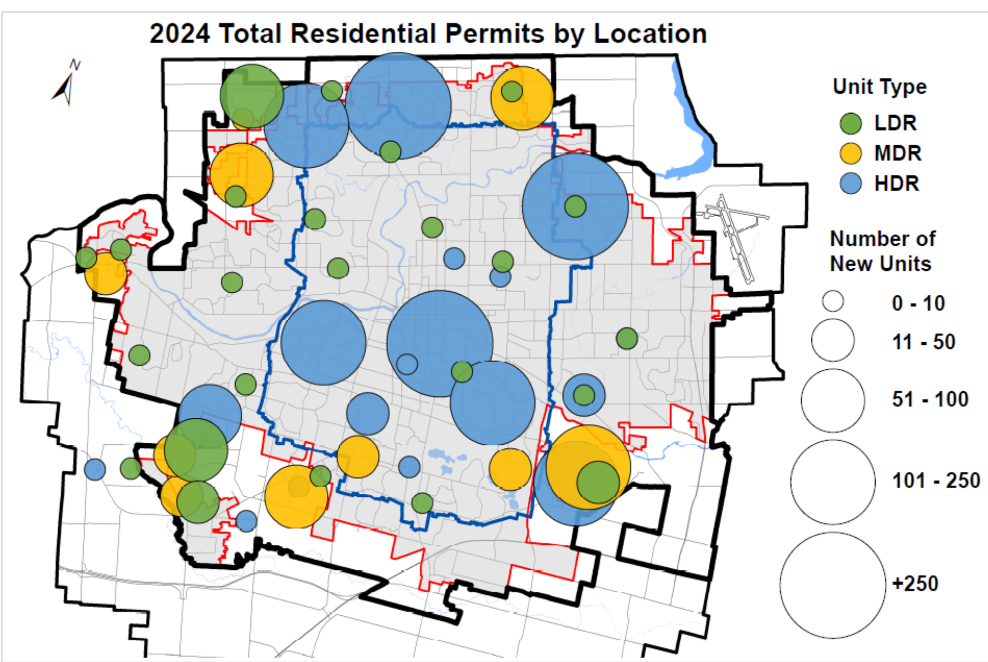
Residential Permit Activity



Units & Changes (▲▼)

	Units	Compared to 2023	Compared to projections
Low Density Residential (LDR) Single and semi-detached dwellings	270	▲+14%	▼-72%
Medium Density Residential (MDR) Rowhouses and townhouses	522	▲+52%	▼-39%
High Density Residential (HDR) Apartments	2,208	▲+155%	▲+28%



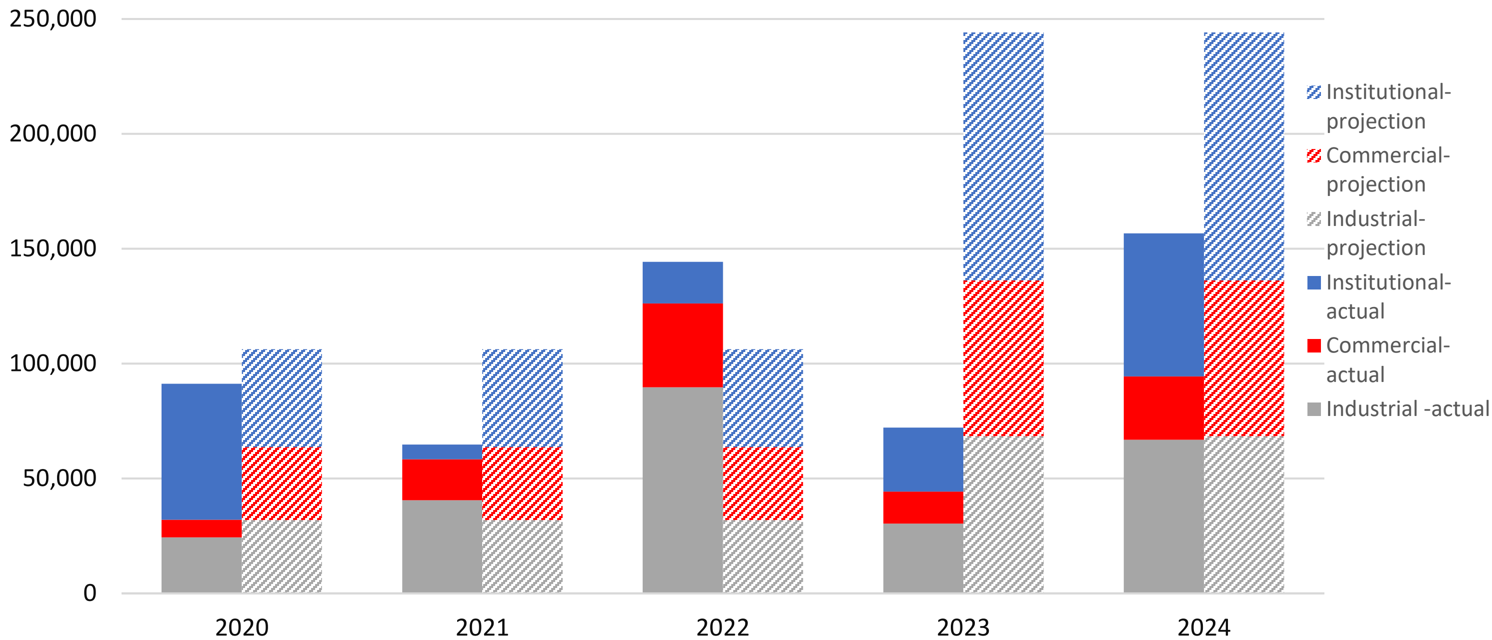


3,000 Units issued (Total)

11 Single detached cluster units issued in Vacant Land Condominiums

17 Apartment buildings issued ranging in size from 6 units to 273 units

Non-Residential Permit Activity



159,691 m^2 of GFA issued (Total)

44% is industrial.

17% is commercial.

39% is institutional.

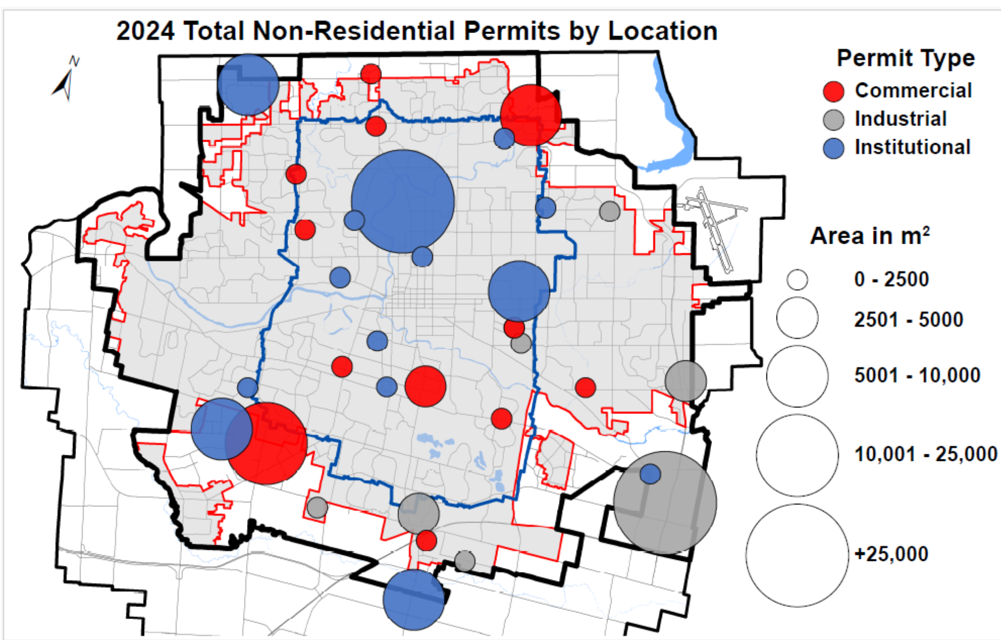
9 New industrial buildings issued

17 New commercial buildings issued

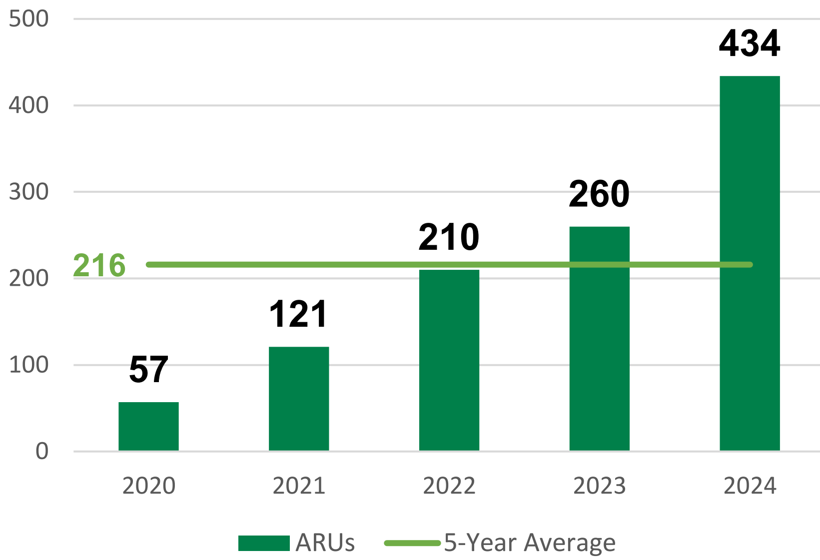
8 New institutional buildings issued

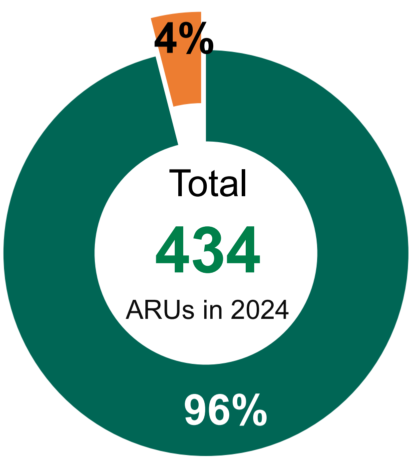
GFA (m^2) & Change (▲▼)

	GFA	Compared to 2023	Compared to projections
Industrial	69,799	▲ +130%	▲ +2%
Commercial (Retail & Office)	27,635	▲ +99%	▼ -59%
Institutional	62,257	▲ +123%	▼ -42%



Additional Residential Units (ARUs)





In a main dwelling

416 Units issued

In an accessory structure

18 Units issued

An Additional Residential Unit (ARU) is a self-contained residential unit with kitchen and bathroom facilities within, and an ancillary to, an existing dwelling.

ARUs in a main dwelling

Upper level ARU

Basement ARU

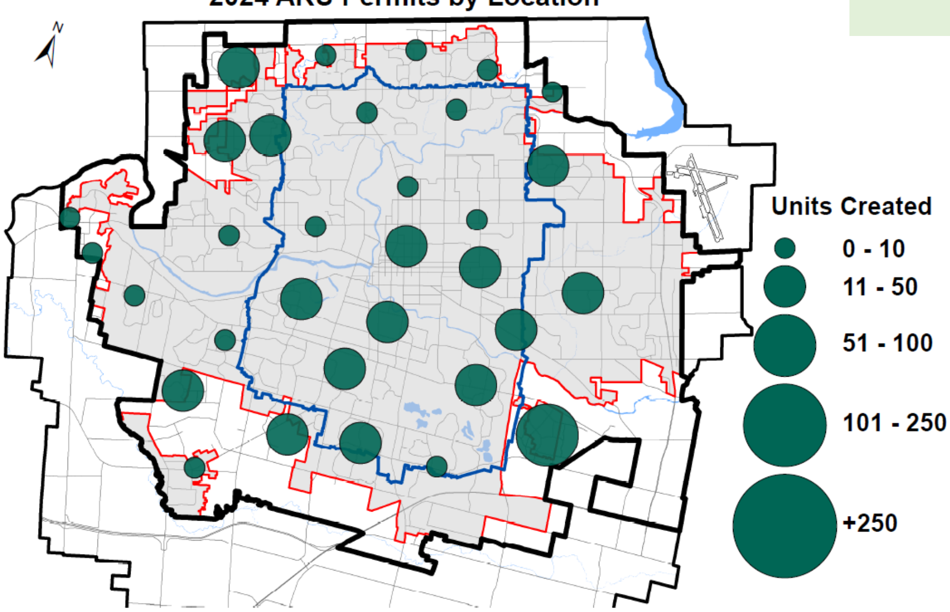
Attached ARU

ARUs in an accessory structure

Detached ARU

A maximum of three ARUs are permitted within a single-detached, semi-detached or street townhouse dwelling in a lot, including a maximum of two ARUs in a maximum of one accessory structure. ARUs do not include lodging houses or converted dwellings.

2024 ARU Permits by Location



67% Increased in the number of ARUs from 2023.

69% of new ARUs were in the Built-Area Boundary.

Affordable Housing

Affordable Housing Target by 2026

2,139 units tracked up to the end of 2024

861 units for future opportunities

+ 222 additional units by 2027

Affordable Housing Projects Tracked

534 units

Affordable Rental - City-led Shovel Ready Developments

1,555 units

Affordable Rental – Community-Led Developments

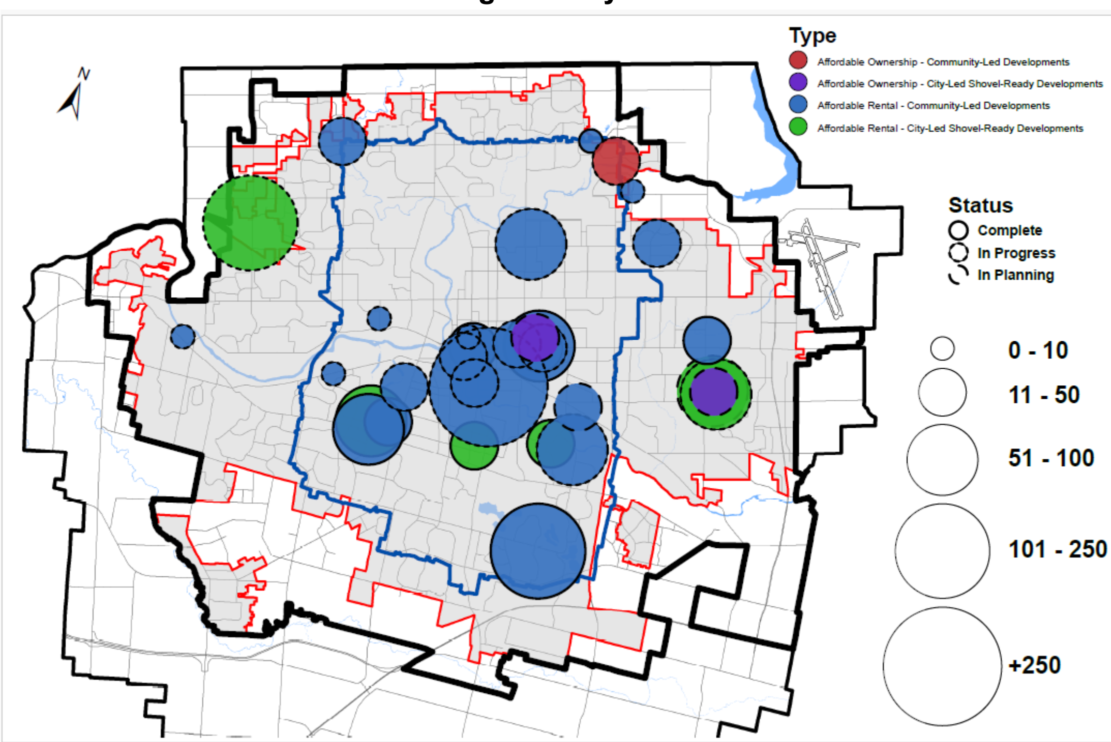
50 units

Affordable Ownership

143 units

Highly Supportive Housing

Affordable Housing Units by Location



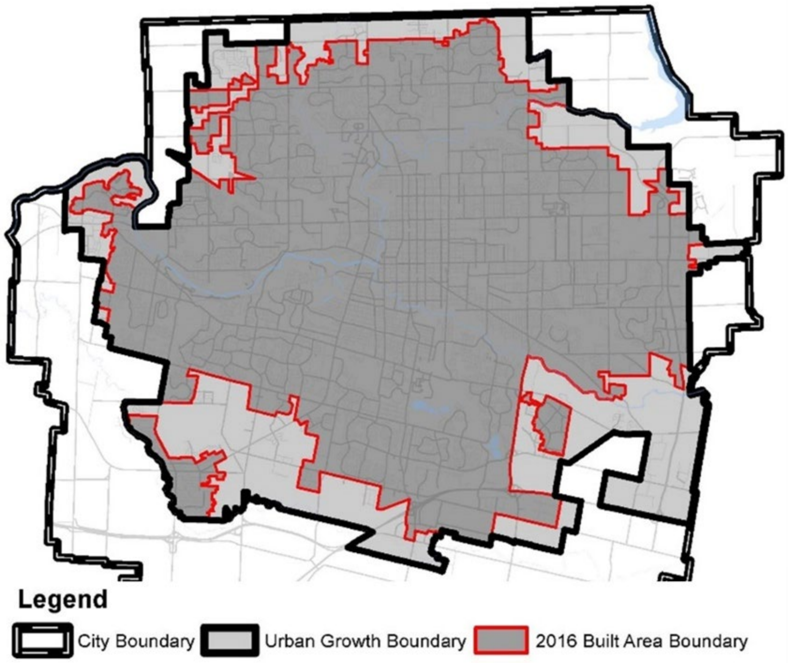
540 units complete

716 units in progress

883 units in planning

Note: The map on the left does not contain all the affordable housing units tracked.

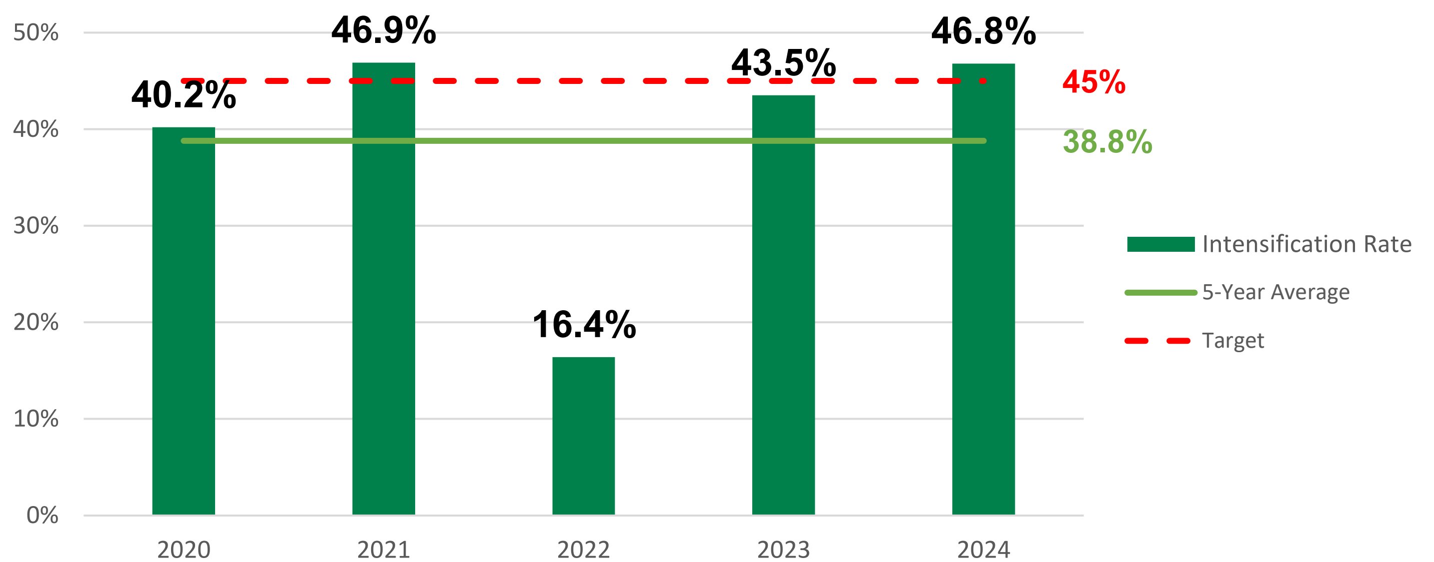
Residential Intensification Rate

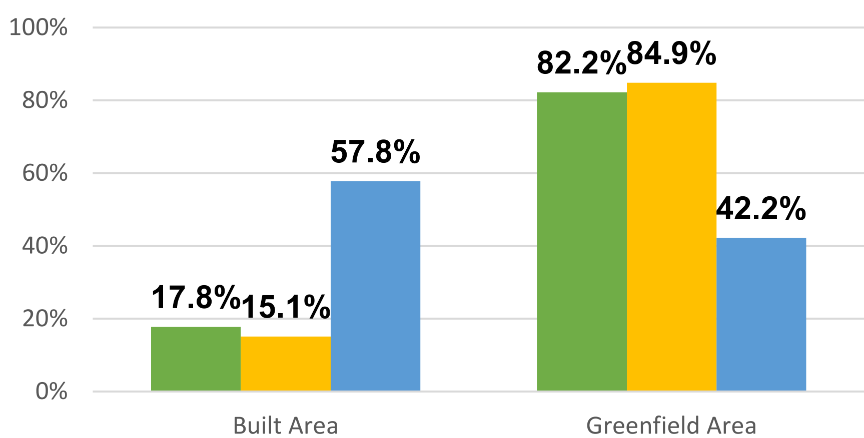


A **Built-Area Boundary** is a fixed line that acts an important land use planning tool to measure intensification and redevelopment.

The London Plan targets a minimum 45% of all new residential units to be constructed within the 2016 Built-Area Boundary of the city, meaning the lands that were substantially built out as of 2016.

The 2016 Built-Area Boundary identified in the London Plan is shown in dark grey on the left.





Residential Units Issued within the 2016 Built-Area Boundary

48 LDR units (Single and semi-detached)

79 MDR units (Rowhouse and townhouse)

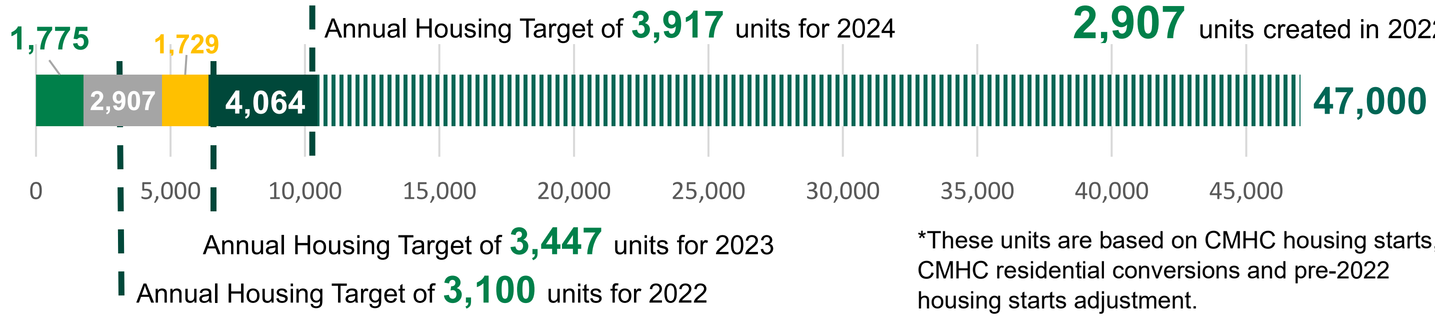
1,276 HDR units (Apartment)

❖ Higher intensification rates are typically driven by high levels of HDR permits are generally located within the Built-Area Boundary.

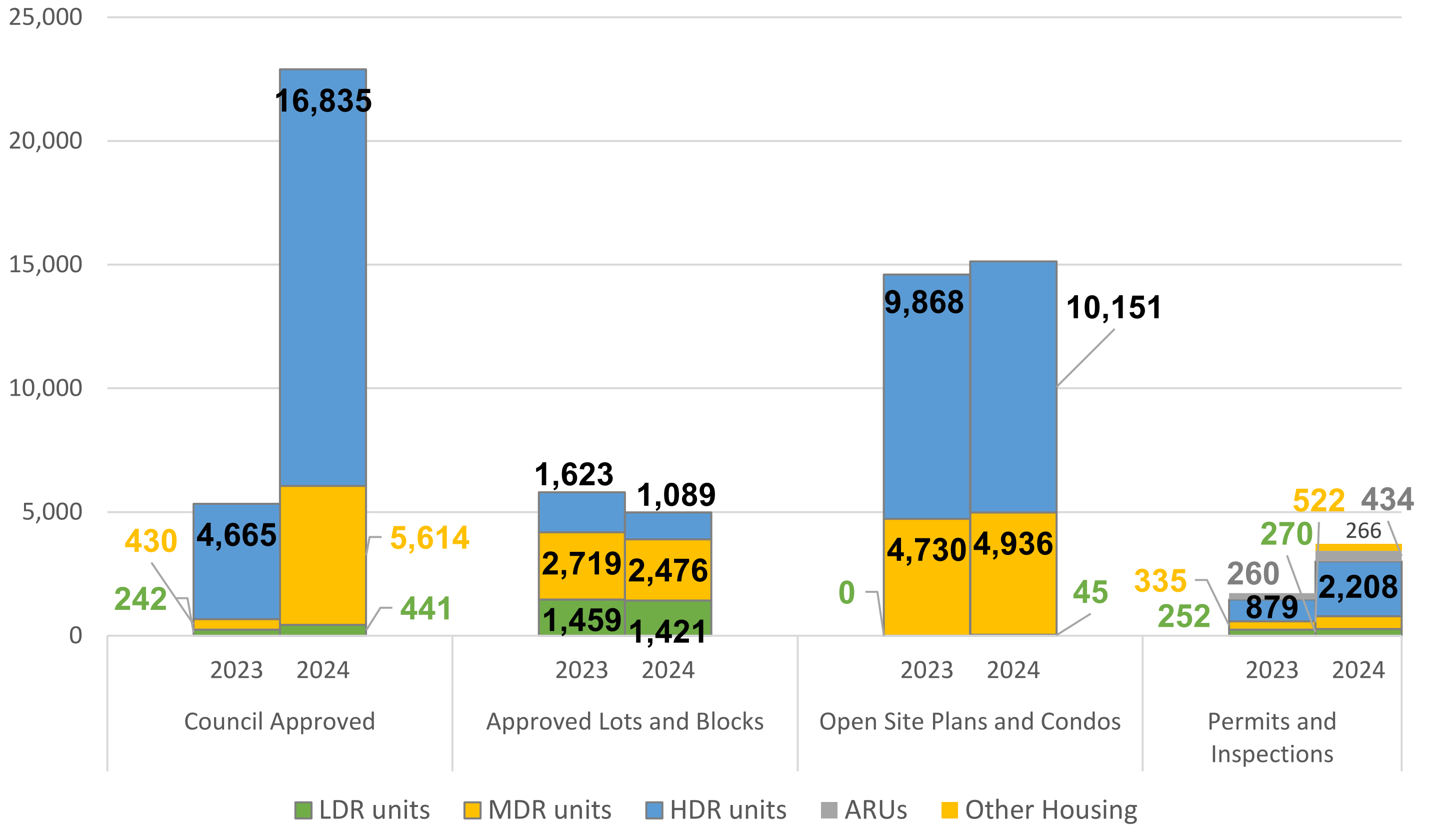
Residential Units in the Development Approvals Process

Roadmap to Municipal Housing Target of **47,000** units by 2031 (including pre-2022 starts of 1,775 units)

4,064 units created in 2024
1,729 units created in 2023
2,907 units created in 2022



*These units are based on CMHC housing starts, CMHC residential conversions and pre-2022 housing starts adjustment.



5,337 units in 2023
22,890 units in 2024

Council Approved
Units in draft approved Subdivision Plans and approved site-specific Zoning By-law Amendments.

5,801 units in 2023
4,986 units in 2024

Approved Lots and Blocks
Units in Registered Subdivision, Condominium and Reference Plans.

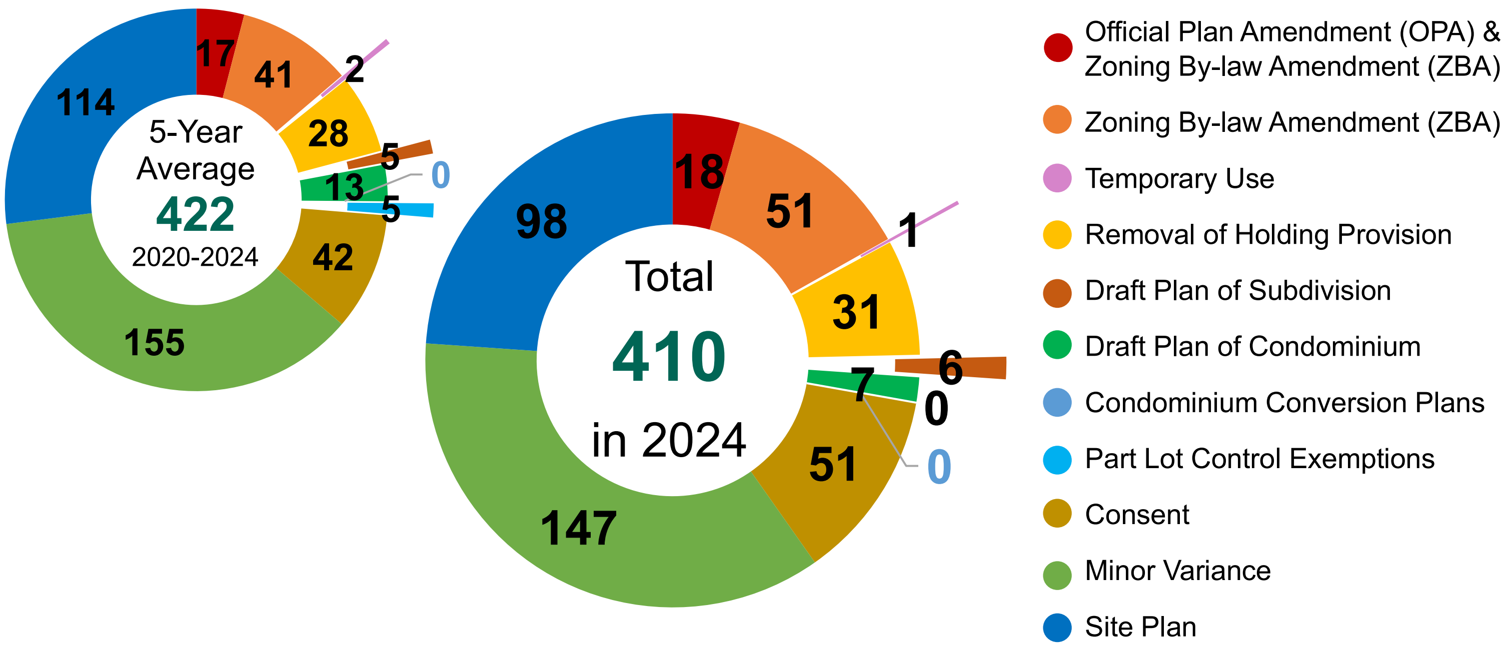
14,598 units in 2023
15,132 units in 2024

Open Site Plans and Condos
Units in Open Site Plans and Draft Approved Condos and Under Review Condos.

1,725 units in 2023
3,700 units in 2024

Permits and Inspections
Units in building permit applications.

Development Application Activity



Percentages of Applications Processing *Planning Act* Timelines & Change (▲▼) compared to 2023

★★★	88%	OPA and ZBA	▲ +27%
★★★	91%	ZBA	▲ +101%
★★★	100%	Temporary Use	▲ +100%
★★☆	50%	Removal of Holding Provision	▼ -32%
★★★	100%	Site Plan	▲ 0%
— — —	0%	Draft Plan of Subdivision	▼ -100%
★★★	71%	Draft Plan of Condominium	▲ +54%
— — —	N/A**	Condominium Conversion Plans	N/A*
★★★	100%	Consent	▲ +6%
★★★	95%	Minor Variance	▲ +18%

*There is no statutory timeline for Part Lot Control Exemption application.
** There was no application received or 0% of applications processing timelines in 2023.

233 Consultations held in 2024 (Total)

108 Pre-Application Consultations

125 Site Plan Consultations

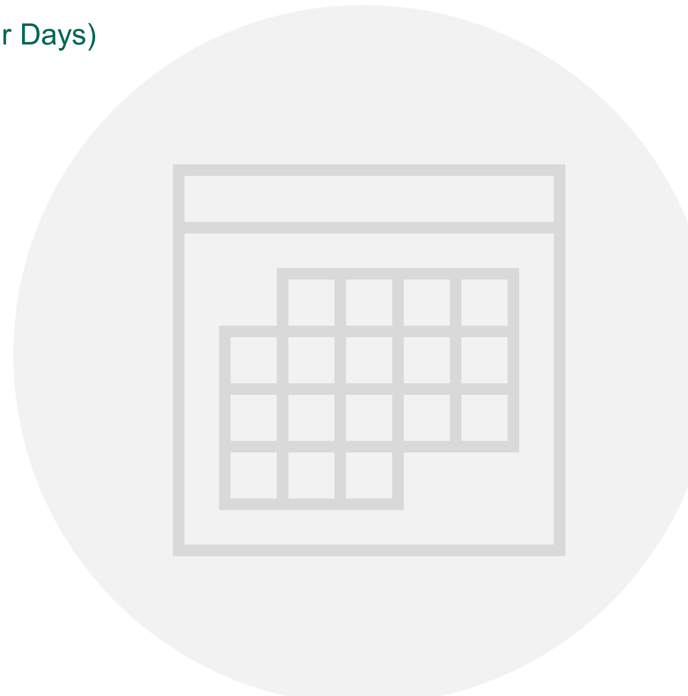
91% of Consents were heard within 75 days.

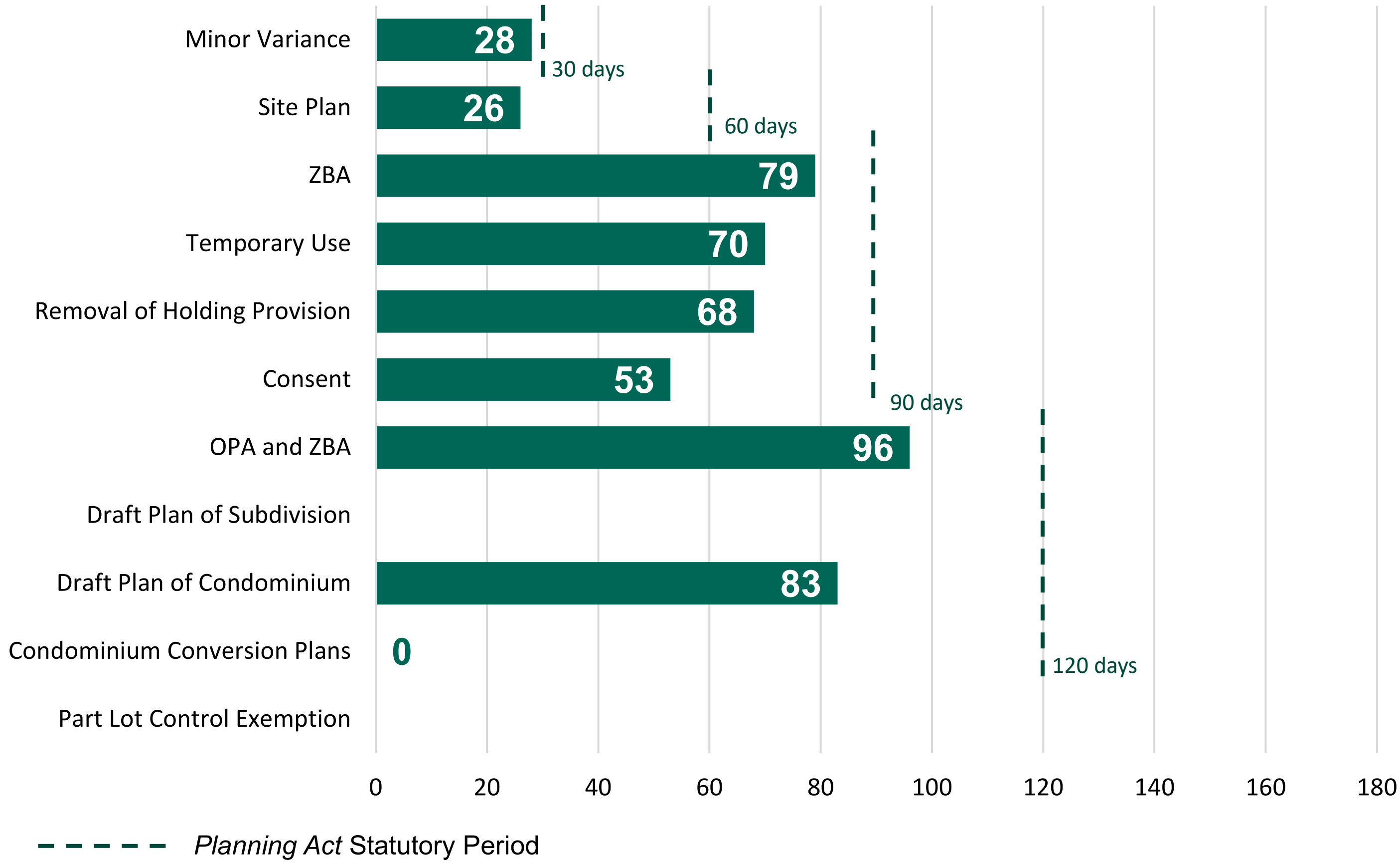
95% of Minor Variances were heard within 40 days.

Planning Act timeframes are measured in calendar days, which is not consistent with actual working days. This has an impact mainly on application types with short timeframes like Minor Variances.

Time for resubmissions and applications put on hold at the request of an applicant are counted within timelines. Time associated with these are beyond the City's control but still impact timeframes.

Planning and Development Process Metrics and Targets (in Calendar Days)





Residential Units Proposed in Applications*

9,890 Units in Site-Specific OPAs and ZBAs (Total)

108 were LDR units.

1,188 were MDR units.

8,594 were HDR units.

992 Units in Site Plans Only (Total)

96 were LDR units.

268 were MDR units.

628 were HDR units.

* These units have been proposed in applications submitted from January 1, 2024 to December 31, 2024.

2024 Continuous Improvement (CI) Initiatives

A key principle of Council's Strategic Plan is that City services put residents and businesses at the centre, using innovative approaches and continuous improvement to meet the needs of Londoners.

Throughout 2024, Planning and Development has continued to move forward on measures to improve service delivery, and application processing times.

London Housing Pledge

The Targeted Actions to Increase London's Housing supply identifies initiatives to facilitate delivery of new housing in support of Council's pledge of 47,000 new units. Approved by Council in April 2024 and developed in collaboration with development industry partners, the Targeted Actions document identifies the actions, timelines, development tracking and reporting methods associated with different categories of housing units. Staff continue to monitor developments and facilitate actions to advance housing supply.

The London Plan and Zoning Continuous Improvement Initiative

Various improvements to the application process were initiated to improve efficiency and consistency. These include amendments to the London Plan and Zoning By-law amendments (pending Provincial approval) related to building heights in all place types, the creation of new Transit Villages, and identifying new Strategic Growth Areas and Major Shopping Areas; and removal of 222 holding provisions. Planning and Development will continue to monitor the application process and explore possible adjustments or improvements.

Additional Residential Units (ARUs)

Under the Housing Accelerator Fund project, City's Additional Residential Unit policies were updated to permit four (4) units as-of-right per lot. It encourages alternative forms of housing, increases density within context of existing neighbourhoods, and increases housing supply and opportunities for affordable housing units.

Committee of Adjustment (CoA) CI Initiative

The London Consent Authority for lot creation has been delegated to Civic Administration for consistency and expediency of process. This process also creates further efficiencies for the Committee of Adjustment, serving as the delegated authority for Minor Variance applications.

Housing Open Data Initiative

London is the first city to provide detailed GIS data related to housing, approved development lands, and vacant developable lands, hosted on the City's Open Data platform starting in 2024. This data is being made available in the spirit of accountability and collaboration to drive further innovation in the field of housing.

Complete Application Circulation Process (Non-Consults)

Following the Ontario Government's removal of mandatory consultation from the Planning Act, Staff have developed a streamlined process for gathering complete application requirements for Planning applications that allows a response to proponents within less than one week. This new process has also allowed staff to proactively work with proponents of minor Zoning Bylaw amendments which are generally supported by staff, to avoid unnecessary consultation processes for fast-tracked approvals.

File Opening and Closing Process Continuous Improvement Initiative

Planning Implementation staff have streamlined and improved the File Opening and Closing Process to ensure consistency of record keeping and completion of all required tasks for opening and closing files related to OPAs and ZBAs. The new process improves data accuracy and management in the file tracking system, ensures website information is up to date and ensures resources related to notices and signage are being managed effectively. Staff have also been cleaning up stale and outdated files and will be proactively reaching out to applicants of on-hold files to bring them forward for Council decisions.

Reducing Off-the-Clock Permit Applications

New administrative procedures were proposed to address the issue of reducing off-the-clock building permit applications. Strategies include cancellation of applications being inactive for 6 months and those in the system for more than 2 years, concurrent review with site plan, and issuance of partial permits based on a principal agreement to the site plan, thus allowing construction to start prior to the full building permit issuance.

Subdivision Continuous Improvement Initiative

Staff have completed and started various continuous improvement initiatives which include updates to draft plan conditions, subdivision agreement and security policy. Further to this, the Subdivision and Development Inspections Department lead the site alteration bylaw update. These initiatives will lead to a more streamlined subdivision approval process with the goal of providing housing sooner for Londoners.

Site Alteration By-law

The Site Alteration By-law was recently updated to encompass the entire limits of the City, subject to certain exemptions, restrictions, and technical review requirements. The new By-law will enhance the protection of natural heritage, facilitate site alteration activities earlier in the development process, and streamline the permitting process.

Digital Planning Application Tracking (DPAT)

The Digital Planning Application Tracking (DPAT) program is a digital transformation that will deliver a series of projects designed to improve the systems and processes around how planning applications are handled, displayed, and reported. A major component of DPAT is the delivery of projects aimed at improving existing City systems and business processes to allow the City and development industry the ability to track planning applications, timelines, and approval dates throughout the duration of planning applications. In April 2024, the first DPAT project was deployed which expanded the City’s existing development and business portal (also known as the Citizen Portal) to include Zoning By-Law Amendments (ZBA) and Site Plan Approval (SPA) applications. Additional, Planning Act application types are being added as the DPAT program progresses.

Growth Management Implementation Strategy (GMIS) Review and Municipal Service and Financing Agreements (MSFA) Policy Review

Reviewed GMIS to ensure it continues to act as a robust implementation tool delivering infrastructure in coordination with development application timing and meeting the goals of the Housing Target of 47,000 new units. Expand GMIS under the forthcoming Development Charges Background Study to include infrastructure projects that support both greenfield (vacant) land development as well as new growth through infill and intensification within the existing built area. MSFA review identified increased dollar value upset limits for infrastructure agreements that advance growth projects outside of their scheduled GMIS timing.

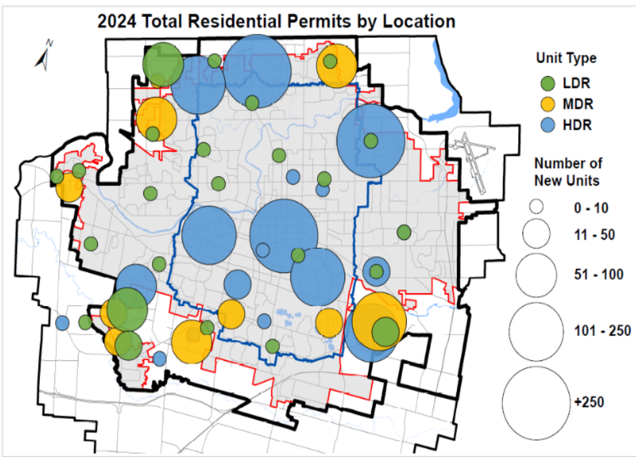
Appendix

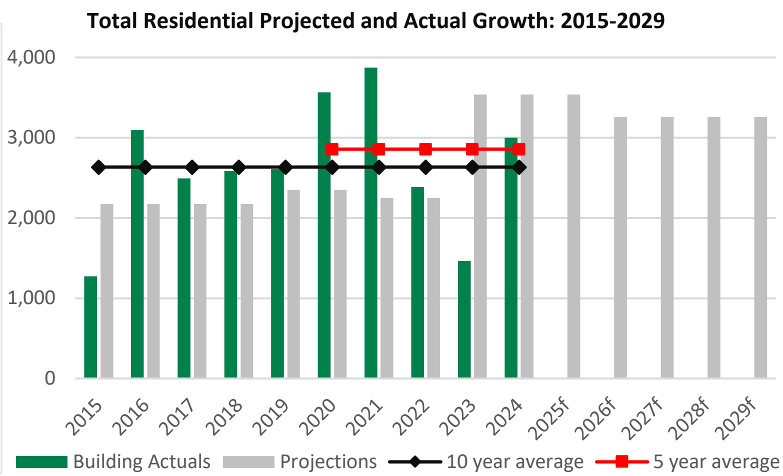
Building Permit Activity: New Residential Units

Total Residential Units

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	2,176	2,176	2,176	2,176	2,349	2,349	2,249	2,249	3,538	3,538	3,538	3,258	3,258	3,258	3,258
Building Actuals	1,275	3,096	2,493	2,584	2,607	3,564	3,872	2,384	1,466	3,000					
5 Year Average						2,857									
10 Year Average	2,634														

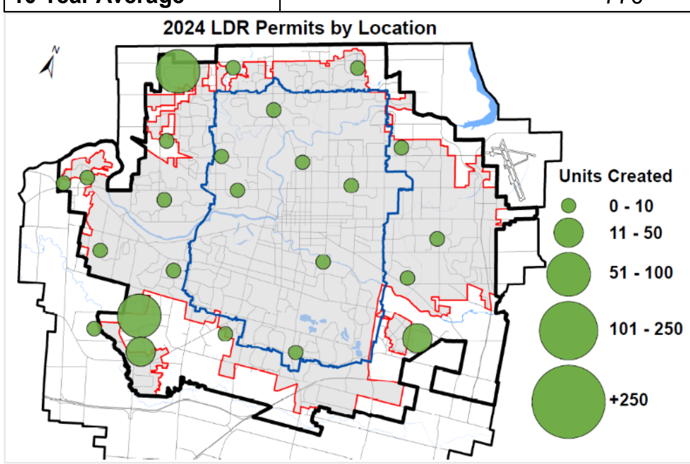
Note: Totals exclude Additional Residential Units.

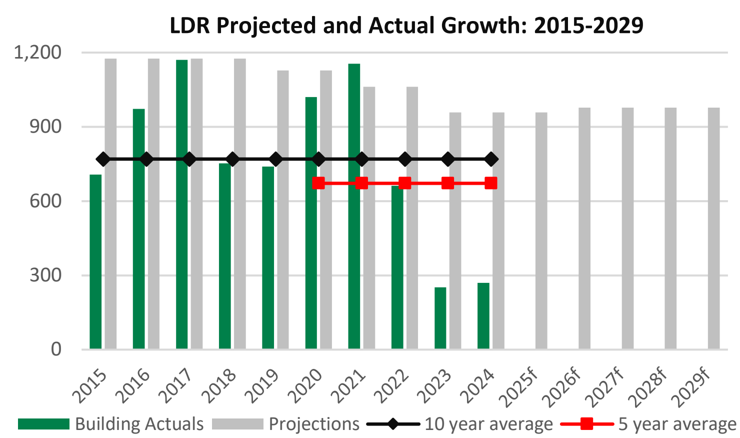




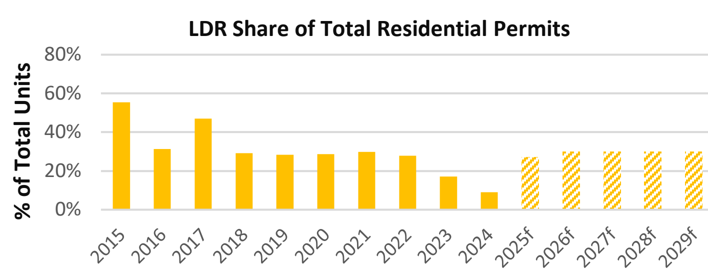
Low Density Residential (LDR) Units

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	1,176	1,176	1,176	1,176	1,128	1,128	1,062	1,062	958	958	958	978	978	978	978
Building Actuals	707	972	1,170	752	739	1,020	1,155	662	252	270					
5 Year Average						672									
10 Year Average	770														



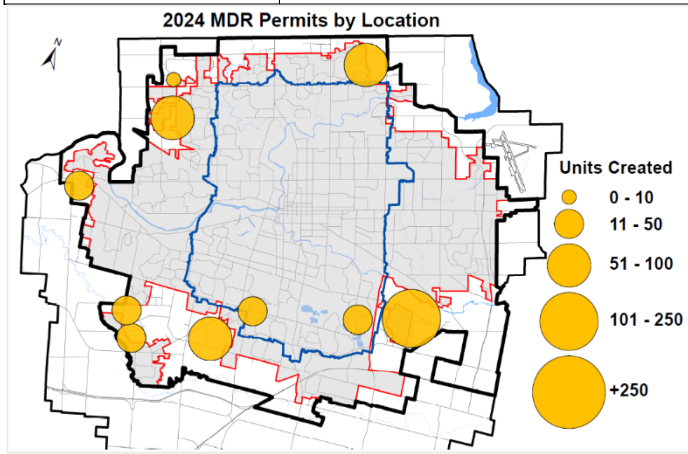


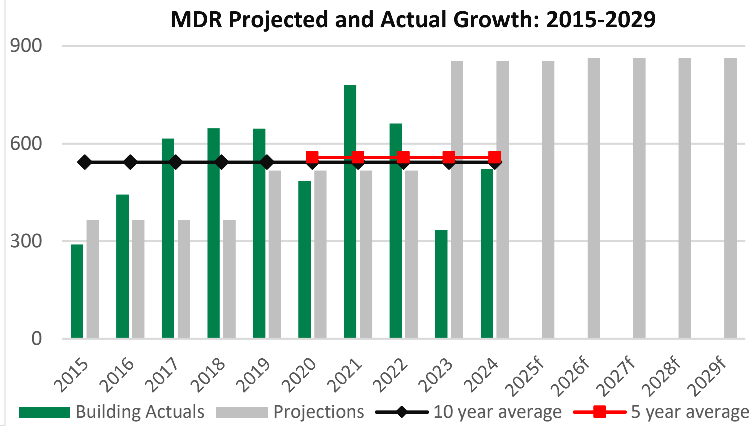
Low Density Residential (LDR) means single and semi-detached dwellings. LDR includes single-detached cluster dwellings in vacant condominium lands but does not include duplexes.



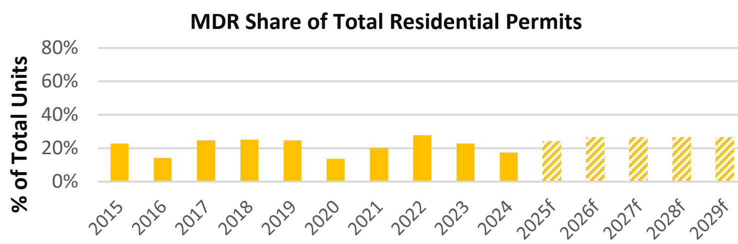
Medium Density Residential (MDR) Units

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	364	364	364	364	517	517	517	517	854	854	854	862	862	862	862
Building Actuals	290	443	615	647	646	485	781	662	335	522					
5 Year Average						557									
10 Year Average	543														



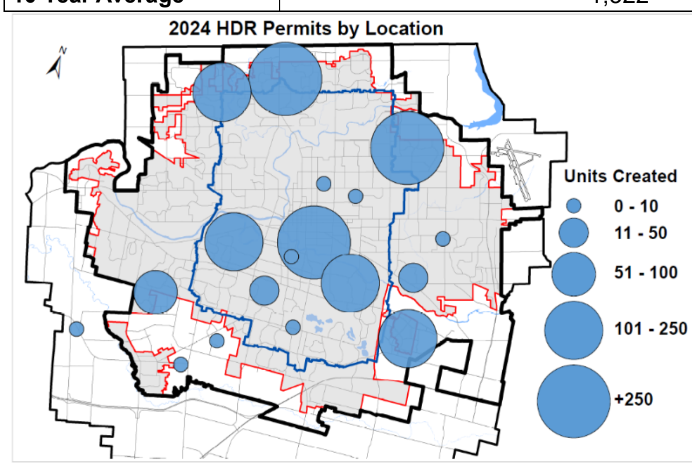


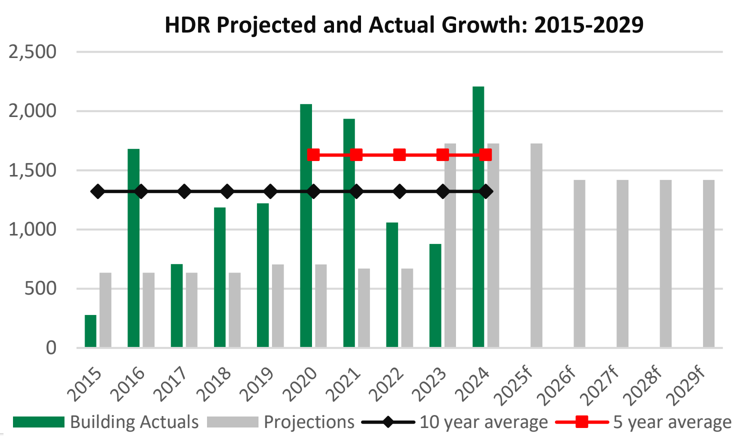
Medium Density Residential (MDR) means rowhouses and townhouses. Triplexes and fourplexes are not included in MDR.



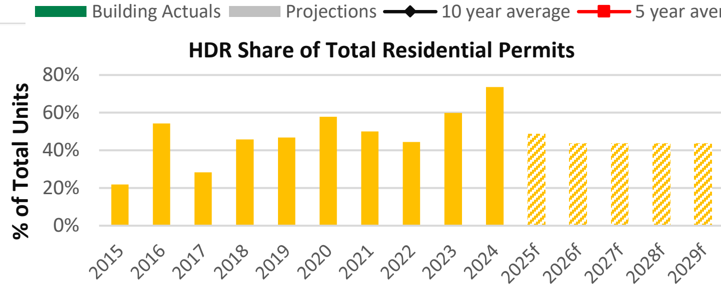
High Density Residential (HDR) Units

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	636	636	636	636	704	704	670	670	1,726	1,726	1,726	1,418	1,418	1,418	1,418
Building Actuals	278	1,681	708	1,185	1,222	2,059	1,936	1,060	879	2,208					
5 Year Average						1,628									
10 Year Average	1,322														





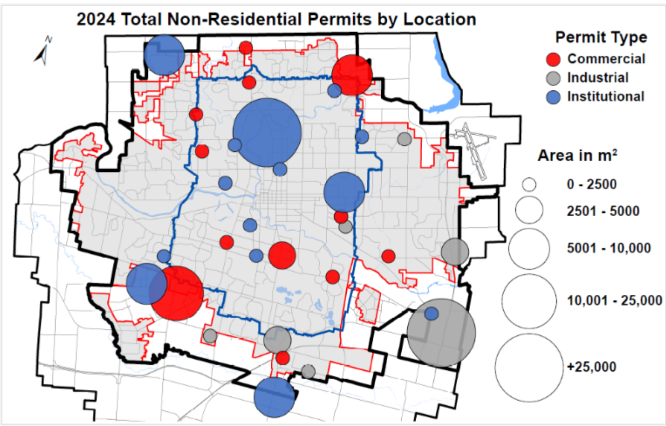
High Density Residential (HDR) means apartments and other multi-unit dwellings, including duplexes, triplexes and fourplexes.

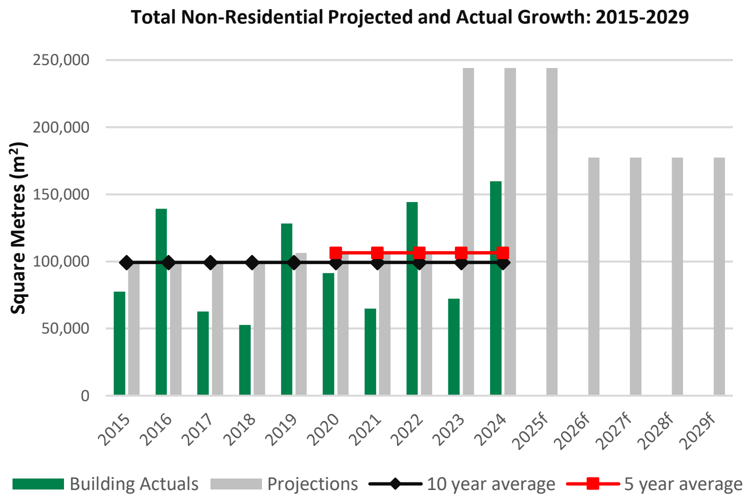


Building Permit Activity: New Gross Floor Area (GFA) of Non-Residential Development

Total Non-Residential GFA

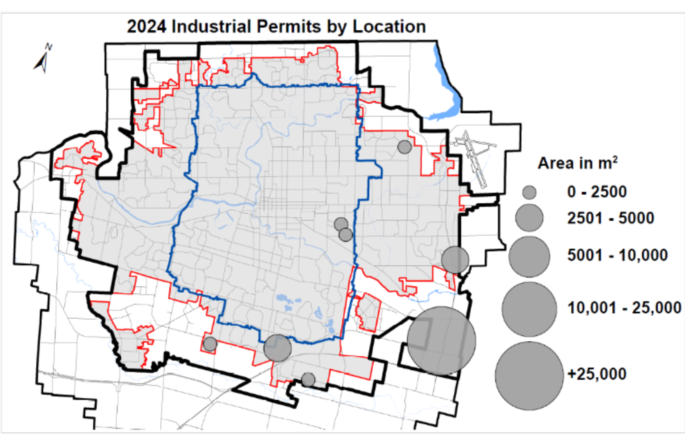
(m²)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	99,588	99,588	99,588	99,588	106,235	106,235	106,235	106,235	244,116	244,116	244,116	177,352	177,352	177,352	177,352
Building Actuals	77,606	139,150	62,734	52,789	128,220	91,269	64,766	144,247	72,202	159,691					
5 Year Average						106,435									
10 Year Average	99,267														

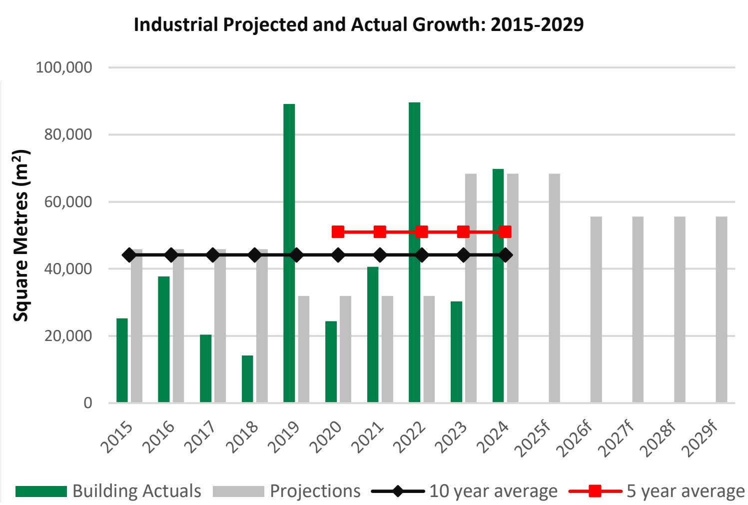




New Industrial GFA

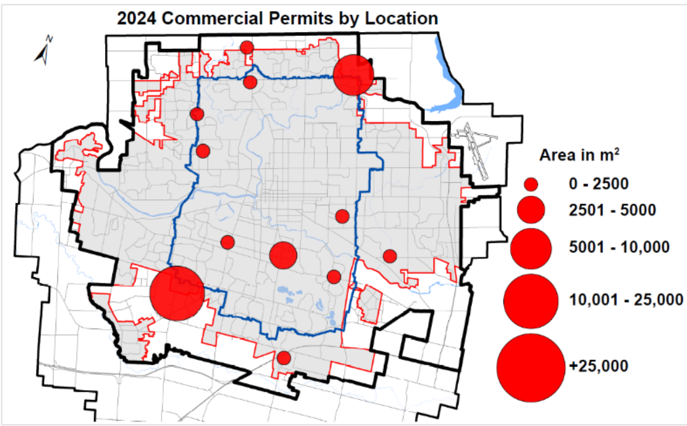
(m²)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	45,855	45,855	45,855	45,855	31,894	31,894	31,894	31,894	68,377	68,377	68,377	55,556	55,556	55,556	55,556
Building Actuals	25,270	37,780	20,433	14,216	89,142	24,393	40,578	89,653	30,343	69,799					
5 Year Average						50,953									
10 Year Average	44,161														

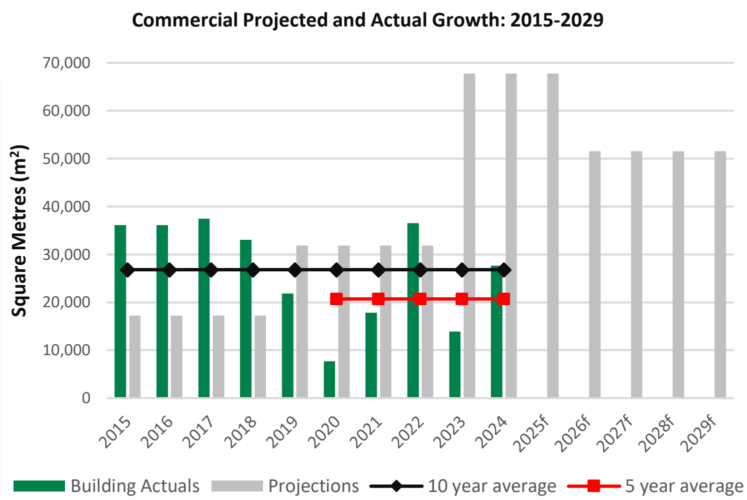




New Commercial GFA

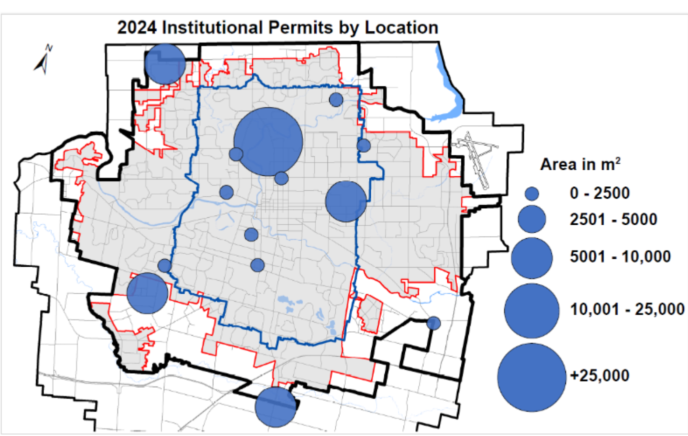
(m²)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	17,242	17,242	17,242	17,242	31,829	31,829	31,829	31,829	67,786	67,786	67,786	51,561	51,561	51,561	51,561
Building Actuals	36,104	36,125	37,430	33,059	21,846	7,672	17,809	36,524	13,894	27,635					
5 Year Average						20,707									
10 Year Average	26,810														

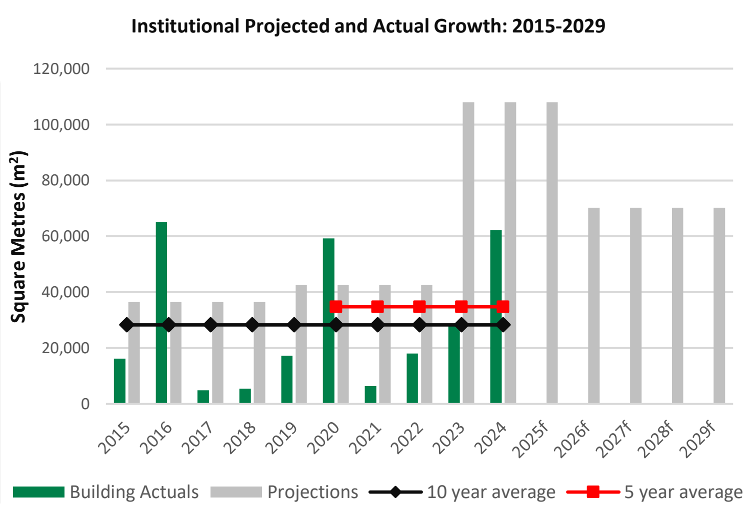




New Institutional GFA

(m²)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025f	2026f	2027f	2028f	2029f
Altus/Watson Projections	36,491	36,491	36,491	36,491	42,512	42,512	42,512	42,512	107,953	107,953	107,953	70,235	70,235	70,235	70,235
Building Actuals	16,232	65,245	4,871	5,514	17,232	59,204	6,379	18,070	27,965	62,257					
5 Year Average						34,775									
10 Year Average	28,297														





Affordable Housing

Road Map Programs	Units Complete[1]	Units in Progress[2]	Units in Planning[3]	Roadmap Units Tracked	Roadmap Units Remaining	Additional Units by 2027	Total Units by 2027
1. Affordable Rental							
City-led Shovel Ready Developments	177	100	257	534	323	100	957
Community-led Developments	363	602	590	1,555	422	100	2,077
2. Affordable Ownership							
City-led Shovel Ready Developments	0	0	36	24	33	11	68
Community-led Developments	0	14		26	83	11	120
Total	**540**	**716**	**883**	**2,139**	**861**	**222**	**3,222**
Highly Supportive Housing[4]	*93*	*0*	*50*	*143*	*457*		*600*

Notes:

1. Units Complete: Occupancy has been granted.
2. Units in Progress: Building permit has been issued.
3. Units in Planning: Development application has been received, design and development review in process.
4. A target of 222 additional Highly Supportive Housing units is included in the 600 contemplated under the Whole of Community System Response (WoCSR). The associated funding provides a mechanism for the City to contribute capital funds for this initiative but independent of the Roadmap to 3,000. The contribution is capped at $45,000 per unit.

Residential Units in the Development Approvals Process

Dwelling Type	Council Approved Units in 2023	Council Approved Units in 2024	Approved Lots and Blocks in 2023	Approved Lots and Blocks in 2024	Open Site Plans & Condos in 2023	Open Site Plans & Condos in 2024	Permits & Inspections in 2023	Permits & Inspections in 2024
Low Density Residential	242	441	1,459	1,421	0	45	252	270
Medium Density Residential	430	5,614	2,719	2,476	4,730	4,936	334	522
High Density Residential	4,665	16,835	1,623	1,089	9,868	10,151	879	2,208
Additional Residential Units	n/a	n/a	n/a	n/a	n/a	n/a	260	434
Other Housing Units	n/a	n/a	n/a	n/a	n/a	n/a	0	266
Total	**5,337**	**22,890**	**5,801**	**4,986**	**14,598**	**15,132**	**1,725**	**3,700**

Development Application Activity

2020-2024 Applications Received and Processed within Planning Act Timeframes

Application Type	Statutory Period (Days)	2020		2021		2022		2023		2024			5-Year Average of Applications Received
		Applications Received	% (1, 2, 5)	Applications Received	% (1, 5)	Applications Received	% (1, 5)	Applications Received	% (1, 5)	Applications Received	Applications in process (3, 5)	% (1, 5)	
OPA and ZBA (6)	120	17	29%	25	20%	14	14%	13	69%	18	2	88%	17
Zoning By-law Amendment (ZBA) (6)	90	27	26%	36	3%	50	6%	42	45%	51	5	91%	41
Temporary Use	90	2	100%	3	67%	1	0%	2	50%	1	0	100%	2
Removal of Holding Provision	90	35	43%	37	51%	20	45%	19	74%	31	7	50%	28
Draft Plan of Subdivision	120	3	0%	8	0%	4	0%	5	20%	6	3	0%	5
Draft Plan of Condominium	120	14	64%	21	29%	8	63%	13	46%	7	0	71%	13
Condominium Conversion Plans	120	0	n/a	1	100%	0	n/a	0	n/a	0	0	n/a	0
Part Lot Control Exemption	n/a	4	n/a	10	n/a	5	n/a	5	n/a	0	0	n/a	5
Consent	90	38	37%	43	77%	42	83%	36	94%	51	5	100%	42
Minor Variance	30	142	14%	170	9%	158	7%	157	80%	147	11	95%	155
Site Plan	60 (4)	113	86%	122	55%	117	93%	120	100%	98	9	100%	114
TOTAL APPLICATIONS		**395**		**476**		**419**		**412**		**410**			**422**
Pre-Application Consultations		118		138		128		162		108			131
Site Plan Consultations		162		212		224		159		125			176
GRAND TOTAL		**675**		**826**		**771**		**733**		**643**			**730**

Notes:

(1) % of applications considered within Planning Act Timeframe. It includes applications processed and applications pending decisions, but the processing timelines have already exceeded Planning Act Timeframe.

(2) Planning Act timelines suspended from March 17, 2020 to June 22, 2020. As such, this period is omitted from the above timeframes.

(3) Applications in process include applications that are pending decisions and the processing timelines as of December 31, 2024 have not exceeded Planning Act Timeframe. These applications are not included in calculating the percentage of applications considered within Planning Act Timeframe.

(4) Revised Bill 109 Statutory Period applies to applications received on or after July 1, 2022. Prior to Bill 109, the Statutory Period for Site Plan Application is 30 days.

(5) Withdrawn applications are not included.

(6) These types of application do not include 12 city-initiated ones.

2024

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PLANNING & DEVELOPMENT

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