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File: O-7983
Planner: M. Johnson

TO:	CHAIR AND MEMBERS PLANNING & ENVIRONMENT COMMITTEE
FROM:	JOHN M. FLEMING MANAGING DIRECTOR, PLANNING AND CITY PLANNER
SUBJECT:	LAND NEEDS BACKGROUND STUDY FOR THE 2011 OFFICIAL PLAN REVIEW MEETING ON JUNE 18, 2013

RECOMMENDATION

That, on the recommendation of the Managing Director, Planning and City Planner, the following actions be taken with respect to the Land Needs Background Study for the Official Plan Review:

- (a) that the Land Needs Background Study, as attached in Appendix A, and the associated Planning staff report **BE RECEIVED** for information, and that this information **BE CIRCULATED** for public and agency consultation;
- (b) a Public Meeting of the Planning and Environment Committee to receive public and landowner input on the Land Needs Background Study be scheduled for July 23, 2013.

PREVIOUS REPORTS PERTINENT TO THIS MATTER
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October 15, 2012	Planning and Environment Committee, "City of London Growth Projections: 2011-2041."
June 18, 2012	Planning and Environment Committee, "City of London Growth Projections: 2011-2041."
January 30, 2012	Strategic Priorities and Policy Committee, "Terms of Reference – Five Year Official Plan Review."

PURPOSE

The report is intended to present the findings of the Land Needs Background Study for the 2011 Official Plan Review. It outlines the population, housing, employment and non-residential construction projections (demand) against the supply of vacant residential, commercial and institutional land found within the current Urban Growth Boundary. The Urban Growth Boundary defines the amount of land required to accommodate the various types of urban growth (residential, commercial, industrial, and institutional) that is forecast to occur over the 20 year planning period. It should be noted that the review of industrial land requirements has been undertaken concurrently in a separate study.

BACKGROUND

The Land Needs Background Study is prepared as a reference document to the City of London's new Official Plan (2011) that will arise from the Rethink London process. The purpose of the Land Needs Background Study is to determine whether a justification exists under the provisions of the Provincial Policy Statement (PPS) and the City's Official Plan to add additional land into the designated urban growth area to accommodate anticipated growth in population, housing and employment for the City of London for the 20 year planning period.

The following section summarizes the applicable policies of the Provincial Policy Statement (PPS) and London Official Plan that provide the policy framework to guide the comprehensive review of the City's land need analysis.

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The Settlement Areas policies contained in Section 1.1.3 of the PPS, provide clear objectives and criteria to ensure that expansions to municipal growth boundaries will only be considered where it has been demonstrated that sufficient opportunities for growth are not available through intensification, redevelopment and/or new development within designated growth areas (i.e., within the Urban Growth Boundary). The consideration of expansions to growth area boundaries must also consider the availability of infrastructure and public service facilities that are available or planned for the area; the consideration of alternatives options to avoid development in prime agricultural areas; and, the mitigation of impacts from expanding the growth area boundary on adjacent agricultural operations.

The policies of local planning jurisdictions must be “consistent with” Provincial policy and the PPS provides criteria that must be addressed before considering expansions to the Urban Growth Boundary. There is a clear onus on municipalities to demonstrate that expansions are required to the Urban Growth Boundary in order to meet the forecast demand for additional land requirements during the planning period.

It is intended that this analysis will meet the requirements set out in the PPS (1.1.2) which states that:

“Sufficient land shall be made available through intensification and redevelopment and, if necessary, designated growth areas, to accommodate an appropriate range and mix of employment opportunities, housing and other land use to meet projected needs for a time horizon of up to 20 years.”

The PPS also makes reference for municipalities to maintain a minimum supply of land adequate to allow for 10 years of growth. Section 1.4.1 states that “...planning authorities shall:

- a) maintain at all times the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands which are designated and available for residential development; and
- b) maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a 3 year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.”

In addition to the policy framework set out in the PPS, modifications to the City’s Urban Growth Boundary (UGB) must be consistent with the Official Plan. Policy 2.5.5 of the Official Plan provides a framework for the evaluation of land requirements to accommodate forecasted growth in population, housing and employment. Section 2.6 of the Plan provides a policy framework for growth management in the City of London, including specific policies that are identified under Growth Forecasting and Monitoring (2.6.5); Land Requirements Forecasting (2.6.6) and Identification of Growth Areas (2.6.7). Policy 2.6.6 establishes a target range of a fifteen to 20 year supply of vacant land designated for urban growth.

It is important to note that land needs analysis is to be conducted at least every five years (in accordance with the provisions of the Planning Act) as part of the municipal comprehensive review process of the Official Plan. During the municipal comprehensive review, City staff will revisit population, housing and employment forecasts and determine if adjustments are required to address changes to growth patterns, market conditions and the broader legislative context. Should these updated forecasts demonstrate the need to include revisions to the urban growth boundary, Council will be afforded the opportunity to reconsider them at that time. Opportunities also exist for Council to initiate a comprehensive review of the land supply prior to such reviews, if it has been determined that there is a need to review expansions to the urban growth boundary.

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OVERVIEW OF LAND NEEDS BACKGROUND STUDY

The basis of this Land Needs Background Study is the population, employment, housing and non-residential construction (industrial, commercial and institutional) projections for the 20 year planning period from 2011 to 2031. These growth projections inform the likelihood of anticipated residential and employment demand over the next 20 years. Altus Group Economic Consulting was retained by the City of London to prepare an update to their 2006 growth forecast report: Employment, Population, Housing and Non-Residential Construction Projections, City of London, Ontario. The growth forecasts contained in the 2011 Altus update report were received and endorsed by Council in October 2012.

The following sections summarize the major findings of the Land Needs Background Study (attached as Appendix 1). Information on demand and supply for residential and non-residential lands precedes the evaluation of future residential and employment land needs based on a 20 year timeframe as established in the PPS.

Residential Demand and Supply

One of the primary factors determining new housing unit demand is an understanding of to what extent the city’s population base is likely to expand, and how this translates into overall housing needs. Based on the projections provided by Altus, the City of London is expected to grow from 336,151 to 443,500 persons during the 20 year planning period (2011 to 2031), as shown in Table 1. As indicated in the Altus report, the following issues will affect future population growth: birth rates are climbing, contributing to a higher natural population increase than in previous years; baby boom retirements will increase labour force demand, attracting new residents to London; and, positive net migration is anticipated for London, contributing to population growth.

Table 1: Population by Age Cohort, Forecasted Outlook, 2011-2031

Age Cohort	Census				Projections			
	1996(a)	2001(a)	2006(a)	2011(a)	2016f	2021f	2026f	2031f
	<i>Number of Persons</i>							
0-4	22,665	19,235	18,470	19,995	20,900	22,200	23,000	23,300
5-9	22,245	22,330	19,545	19,005	19,500	20,900	22,100	23,000
10-14	21,670	22,600	22,830	20,365	19,200	20,400	21,800	23,000
15-19	20,525	22,720	24,405	24,715	24,400	23,700	25,200	26,600
20-24	24,515	25,880	28,195	28,925	31,800	29,700	29,300	30,800
25-29	25,850	23,360	25,065	26,990	28,400	31,700	29,600	29,300
30-34	29,285	24,025	22,755	23,835	27,600	28,500	31,800	29,700
35-39	27,685	27,975	23,810	22,535	24,700	27,600	28,500	31,700
40-44	25,175	27,390	28,215	24,235	23,600	25,700	28,800	29,600
45-49	22,710	25,015	27,860	28,490	23,400	22,900	25,000	28,100
50-54	16,865	22,295	24,890	27,835	27,400	23,300	22,900	25,000
55-59	13,620	16,530	21,915	24,265	26,700	26,800	22,800	22,500
60-64	12,345	13,140	16,075	21,255	23,500	25,800	26,000	22,200
65-69	11,910	11,955	12,720	15,540	20,300	22,800	25,100	25,400
70-74	11,355	11,215	11,280	11,995	15,000	19,600	22,200	24,400
75-79	7,965	9,995	10,030	10,070	11,200	13,700	18,000	20,400
80-84	5,255	6,155	8,150	8,035	8,200	9,100	11,300	14,900
85+	4,000	4,715	6,195	8,030	9,400	10,200	11,400	13,700
Total	325,640	336,530	352,395	366,151	385,100	404,600	424,800	443,500

Source:

(a) Baseline data from Statistics Canada 1996, 2001, 2006, 2011 Census.

(f) Forecast figures provided by Altus Group Economic Consulting (2011 update), "Employment, Population, Housing and Non-Residential Construction Projections".

Note: Some totals may not add-up due to the cumulative impact of rounding.

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To determine the amount of land that is expected to be required for residential development, Altus determines new housing unit demand based on the population forecast for the City, their housing demand model and makes adjustments for the decline in vacant units, non-traditional supply (conversions), replacement demand (demolitions) and student housing units. As noted in Table 2, it is projected that 42,380 new residential units will be required to be constructed within the planning period of 2011 to 2031, an average of 2,119 units per year through the 20 year planning period. Anticipated housing demand is disaggregated by structure type into three categories: (1) single and semi-detached dwellings (low density), (2) row housing (medium density), and, (3) apartment units (high density). Low density housing will continue to absorb a substantial portion of overall housing demand, accounting for approximately 52% of all completions. Over the course of the planning period, demographic shifts in the population structure, coupled with current trends toward renewed urbanization will suggest a shift in consumer preference for smaller, more compact forms of housing. As a result, it is expected that the share row housing and apartment units will account for a growing relative share of overall unit demand over the next two decades, 16% and 31%, respectively.

Table 2: Annualized Housing Completions, Actual and Forecast, 2006-2031

	Singles & Semis	Row Housing	Apartments	All Unit Types
Census Periods	<i>Occupied Dwelling Units</i>			
2006-2011 (a)	1,103	238	793	2,134
2011-2016 (f)	1,043	332	679	2,055
2016-2021 (f)	1,170	379	705	2,254
2021-2026 (f)	1,151	354	644	2,149
2026-2031 (f)	1,096	318	604	2,018
2011-2031				
Forecast Avg.	1,115	346	658	2,119
Forecast Total	22,300	6,915	13,160	42,380

Source:

(a) CMHC Completion Data

(f) Forecast outlook provided by Altus Group Economic Consulting (2011 update)

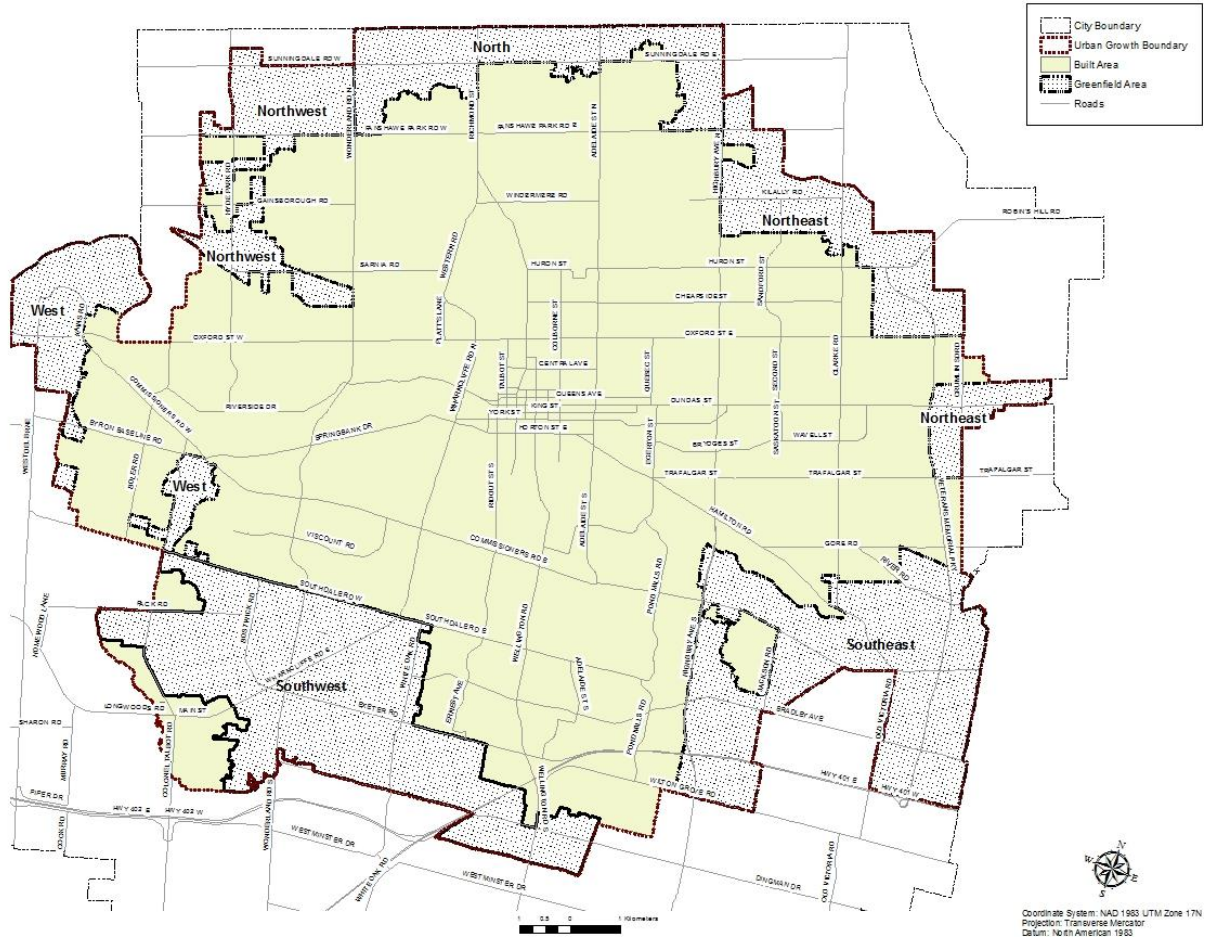
Note: Some totals may not add-up due to the cumulative impact of rounding.

This section outlines the process to determine if we will need to expand the Urban Growth Boundary to accommodate future residential, commercial and institutional development within the next 20 years. There are some terms used in this section that are defined below. These terms include:

1. Urban Growth Boundary (UGB): defines the areas for future growth with the planning period of the Official Plan.
2. Greenfield Area: the area between the built boundary and urban growth boundary.
3. Built Area / Built Area Boundary: the lands located within the built boundary are referred to as the Built Area. Built boundaries identify the extent of developed urban area for a municipality at a certain point in time.
4. Intensification: is development that occurs within the Built Area Boundary.

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Figure 1: Map of City of London Land Area Categories (2011)



It was assumed that not all of the projected new housing unit demand will be met through development of lands within the Greenfield Area. It is expected that a certain proportion of the demand will be met through intensification of lands within the Built Area Boundary. It should be noted that the Greenfield and Built Areas do not represent land use designations, but are intended for use as planning and monitoring tools.

To determine the potential impact of intensification, information provided in building permits was reviewed to verify the extent of permit activity within the Built Area. Based on this review it was determined that intensification accounted for 36% of the total dwelling units constructed between 2006 and 2011. In other words, 36% of the new units constructed between 2006 and 2011 were within the Built Area Boundary. Examination of intensification by type found that, on average in the past 5 years, 5% of the total single and semi-detached dwellings, 24% of total row housing units, 88% of total apartment units were constructed within the Built Area. In order for the City to achieve its 40% intensification target, as identified in the 2011 Official Review and 2030 Transportation Master Plan, 40% of the total housing demand will have to be accommodated through intensification. As a result, the intensification assumptions put forward for the Land Needs Background Study are that 7% of low density, 52% of medium and 88% of high density dwelling unit construction will occur as intensification (i.e., within the Built Area) in order to achieve the 40% intensification target over the 20 year planning period.

Taking into account the intensification assumption outlined above, the total future residential Greenfield unit demand was determined after subtracting the number of units that will be constructed within the Built Area. The following table shows the total future residential Greenfield demand, broken down by low density, medium density and high density units.

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Table 3: Calculation of Residential Greenfield Unit Demand, 2011-2031

	Total City-wide Unit Demand 2011-2031⁽¹⁾	Intensification Factor	Subtract Built Area Units ⁽²⁾	Greenfield Unit Demand 2011-2031
LDR	22,300	7%	1,561	20,739
MDR	6,915	52%	3,596	3,319
HDR	13,160	88%	11,581	1,579
Total	42,380	40%	16,738	25,642

Source:

(1) Altus Group Economic Consulting (2011 update)

(2) City of London, Building Division. Tabulation compiled by Planning Division

Note: Some totals may not add-up due to the cumulative impact of rounding.

The supply of residential Greenfield lands is obtained through the use of the residential Vacant Lands Inventory (VLI), which is monitored by City staff on an ongoing basis. The residential Vacant Land Inventory (VLI) is based on relevant building permit information, subdivision files (including those that have been registered, draft approved or under review), community/area plans, other associated planning data and is checked against 2011 aerial photography. Based on the status of the land (Registered plan, Draft approved plan, designated residential, urban reserve community growth), the potential for residential development was inventoried as follows:

Table 4: Residential Vacant Land Inventory – Units Available on December 31, 2011

Status/Category	Land Area (ha)	Low Density Units	Medium Density Units	High Density Units	Total Units
Registered Subdivision Plans	1,209	1,457	2,004	807	4,268
Draft approved subdivision plans	541	4,132	2,877	1,731	8,740
Draft subdivision plans - under review	322	2,668	2,314	2,911	7,893
Designated residential lands	985	13,772	11,681	8,474	33,927
Urban Reserve Community Growth	666	2,545	1,036	622	4,203
Total	3,723	24,574	19,912	14,545	59,031

Source:

Vacant and Underutilized Residential Land Summary, 2011 Year-end Compilation. Prepared by Development Approvals Business Unit (DABU)

Note: VLI does not take into account additional supply within the built boundary made available via intensification efforts or urban redevelopment initiatives.

Five adjustments were made to the supply of residential Greenfield lands.

1. A sizable amount of industrial lands were subject to redesignation for non-industrial uses through the Southwest Area Plan (SWAP). Where applicable, these lands were removed from the industrial VLI and a portion was transferred to the residential VLI.
2. An examination of building permits issued between 2006 and 2011 that indicated approximately 55% of the units built on medium designated lands were actually low density type structures (single and semi-detached dwellings). Conversely, nearly 10% of units built on low density designated land were of a medium density type (row townhouses or cluster housing). To account for this, a conservative approach was

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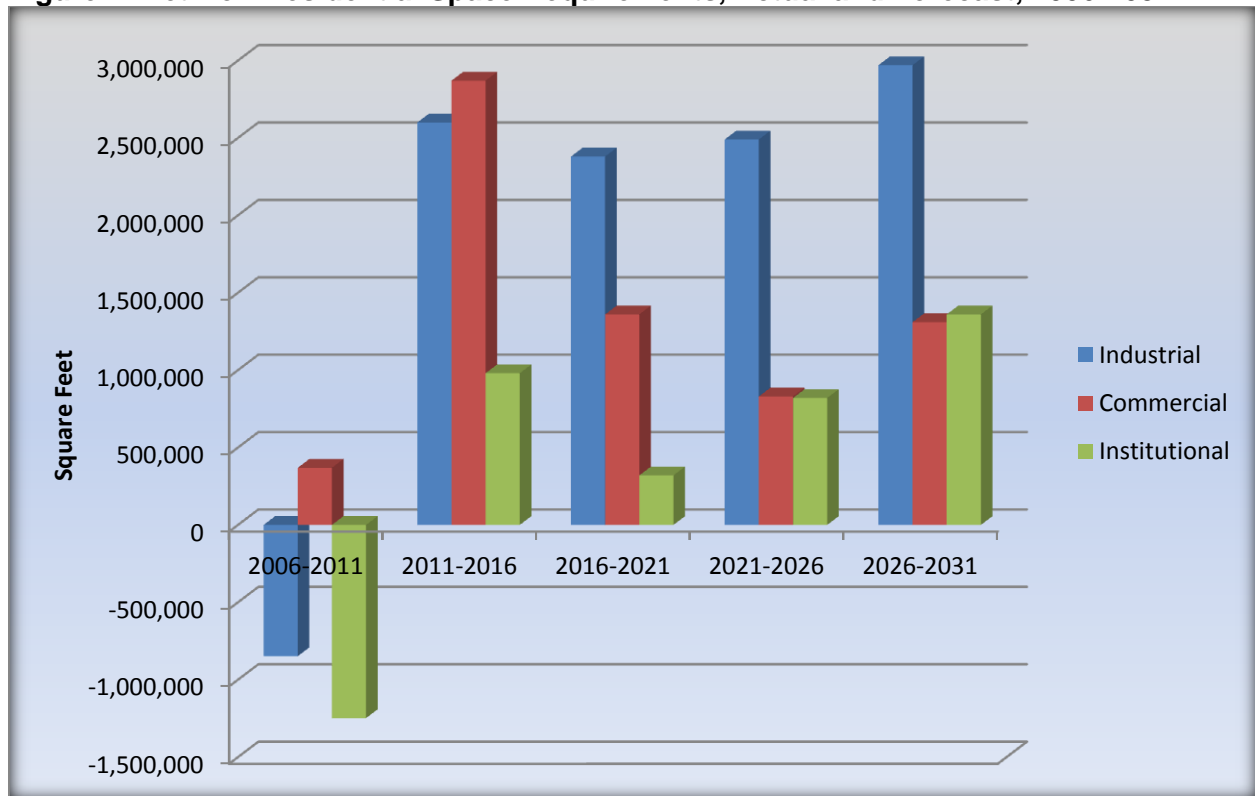
chosen, whereby 25% of medium density residential lands would be allocated to low density residential lands.

3. Provides for the application of revised densities based on review for designated lands.
4. The designated and urban reserve lands located within the Byron Pits area have been included in the final supply, as it is now likely there will be an opportunity for redevelopment to residential uses within the 20 year planning period. The development potential is based on personal communication with pit operator as of January 2013.
5. The construction of the Southside Sewage Treatment Plant was previously identified as having major implications for the future development of land in the Southwest area of the City (land generally south of Southdale Road and west of Wharncliffe Road). However, since capacity efficiencies have been realized at the Greenway Sewage Treatment Plant, the construction of the Southside Sewage Treatment Plant by 2016 is no longer a barrier to development in the Southwest. Therefore, it is assumed that higher levels of development in the Southwest can occur prior to the previously established timeline of 2016.

Non-Residential Demand and Supply

Detailed employment growth projections, prepared by Altus Group, provide the basis for determining land needs requirements for non-residential uses. It is expected that 3,480,000 million square feet of commercial and 6,370,000 million square feet of institutional space will be required over the projection period, 56% of which is expected to occur in the first ten years. It is anticipated that 17% and 31% of total non-residential demand over the planning period will be for commercial and institutional space, respectively. Figure 2 shows historical and projected industrial, commercial and institutional space requirements.

Figure 2: Net Non-Residential Space Requirements, Actual and Forecast, 2006-2031



Source:

Altus Group Economic Consulting (2011 update)

An adjustment has been made to the projected non-residential demand. By applying the same approach that was used to determine residential Greenfield demand, it was assumed that a certain proportion of the demand will be met through intensification of lands within the Built Area. To determine the potential impact of intensification, information provided in building permits was reviewed to verify the extent of permit activity within the Built Area. Based on this review, it was determined that commercial floor space constructed on lands within the Built Area accounted for 53% of the total commercial construction. It was also determined that 87% of institutional floor space was constructed within the Built Area. This review demonstrates that a large proportion of commercial demand will continue to be accommodated through redevelopment or expansion of existing sites within the Urban Growth Boundary. Additionally,

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the majority of the demand for growth of major institutional uses will be met through expansion of existing facilities on their current sites as well. In the interest of consistency of approach to the residential demand analysis, very conservative intensification assumptions are proposed for determining commercial and institutional Greenfield demand over the 20 year planning period (see Table 5).

Table 5: Commercial and Institutional Intensification, 2011-2031

	Actual Intensification 2006-2011	Intensification Assumption
Commercial	53%	40%
Institutional	87%	82%

Source:

City of London, Building Division. Tabulation and Projections compiled by Planning and Development

Taking into account the intensification assumptions outlined above, future Greenfield demand for commercial and institutional lands were determined after subtracting the amount of demand that will be constructed within the Built Area. The following table (Table 6) shows the final Greenfield demand for both commercial and institutional lands. An alternative analysis was undertaken that assumed an intensification of 0% within the Built Area. The impact of this assumption will be discussed further in this report.

Table 6: Calculation of Commercial and Institutional Greenfield Demand, 2011-2031

	Total City-wide Demand 2011- 2031 (sq ft) ⁽¹⁾	Intensification Assumption	Subtract Built Area (sq ft)	Greenfield Demand 2011-2031 (sq ft)	Divide By Floor Area Ratio	Final Greenfield Demand 2011-2031 (ha)
Demand considering intensification						
Commercial	3,480,000	40%	1,392,000	2,088,000	0.30	65
Institutional	6,370,000	82%	5,223,400	1,146,600	0.42	25
Demand without intensification						
Commercial	3,480,000	-	-	3,480,000	0.30	108
Institutional	6,370,000	-	-	6,370,000	0.42	141

Source:

(1) Altus Group Economic Consulting (2011 update)

The supply of commercial & institutional lands was updated from the 2010 Industrial Commercial, and Institutional Vacant Land Inventory (VLI) by the Planning Division for the 2014 Development Charge Study work program. It should be noted that for the purposes of Land Needs Background Study the Industrial Commercial, and Institutional Vacant Land Inventory (VLI) only details the supply of vacant lands. It does not include underutilized lands located in areas traditionally defined as industrial districts, business parks, commercial and institutionally designated areas that are available, or potentially available, to accommodate future employment growth. Also not included in the inventory are lands available, or potentially available, to accommodate future employment growth through infill, intensification, adaptive re-use or redevelopment within the urban core, under-utilized parcels along major arterials, in residential areas or outside the urban growth boundary.

Total commercial vacant land accounts for 295 hectares of land. There are many different types of commercially designated land, as outlined in the Vacant Land Inventory. Flexibility of use exists within these commercial areas and instances of re-designation from one commercial land use designation to another are common. With regard to institutional lands, there are currently 102 hectares of vacant institutional land in the inventory. Most of the major institutional uses within the City perform a regional function and significant investment and expansion potential is expected to take place on-site, and not relocate to Greenfield areas. However, the potential for smaller scale institutional uses such as churches, schools, libraries, municipal construction and

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nursing homes can be within both designated institutional areas and other residential land use designations where these types of uses are permitted.

Residential Land Needs Analysis

Future residential land needs are determined by evaluating the ability of Greenfield lands to accommodate projected demand for residential land over the planning period. The total supply of residential minus the projected residential demand yields a total supply of 33,393 Greenfield units remaining at the end of the 20 year planning period (2031). However, this available land supply is not equally distributed across all forms of residential structure type. When broken down by unit type, there will be sufficient land to accommodate 3,834 low density units, 16,593 medium density units and 12,966 high density units.

Table 7: Residential Greenfield Land Needs Calculation (Supply minus Demand)

	Low	Medium	High
20 year Greenfield Supply	24,574	19,912	14,545
20 year Greenfield Demand *	20,739	3,319	1,579
Greenfield units remaining at 2031	3,835	16,593	12,966

* Reflects number of units that have been removed and allocated for in the Built Area.

As can be seen in Table 8, an additional 3 years of low density land, 48 years of medium density land and 20 years of high density land will remain after 2031. This means that there will be sufficient lands to accommodate the projected residential development during the 20 year planning period.

Table 8: Estimated Years of Supply Available

	Low	Medium	High
Estimated Total Years of Greenfield Supply beyond 2011	22	58	22
Estimated Total Years of Greenfield Supply beyond 2031	3	48	20

Calculation of years of supply based on projected annual household completions for the period 2011-2031 (1,115 low units, 346 medium units, 658 high units)

Source: Figures provided by Altus Group Economic Consulting (2011 update)

Allocation of Greenfield Demand

It is not a reasonable expectation for residential development to occur uniformly across all areas of the City. The following spatial distribution of residential demand to individual Districts was prepared as a way of forecasting where and when residential development might occur. District allocations were based on work completed as part of the 2014 DC Background Study.

When allocating residential demand, consideration was given to past development patterns, overall potential for development, propensity for housing types, the Transportation Master Plan, the Growth Management Implementation Strategy (GMIS) infrastructure timelines. The construction of the Southside Sewage Treatment Plant was previously identified as having major implications for the future development of land in the Southwest area of the City (land South of Southdale Road). This lack of servicing was previously seen as a significant limitation on the ability to develop in the Southwest area. However, since capacity efficiencies have been realized at the Greenway Sewage Treatment Plant the construction of the Southside Sewage Treatment Plant by 2016 is no longer a barrier to near and mid-term development in the Southwest. Therefore, it is assumed that higher levels of development in the Southwest can occur prior than previously forecast.

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The following tables show the percentage allocation of low density (Table 9), medium density (Table 10) and high density (Table 11) development to different Districts of the City for the 0 to 5 year period, 5 to 10 year, 10 to 15 and 15 to 20 year period. These allocations are the basis of the land needs calculations in Table 12.

Table 9: Allocations of Total Low Density Residential Construction by District

District	2011-2016	2016-2021	2021-2026	2026-2031
Northeast	5%	25%	16%	10%
North	22%	18%	15%	10%
Northwest	22%	12%	10%	8%
West	15%	5%	4%	17%
Southwest	20%	25%	40%	50%
Southeast	16%	15%	15%	5%

Source:

Interpolation of 2014 DC Background Study growth allocations forecast to align with Land Needs Background Study (2011-2031) planning period

Table 10: Allocations of Total Medium Density Residential Construction by District

District	2011-2016	2016-2021	2021-2026	2026-2031
Northeast	10%	10%	10%	10%
North	25%	25%	25%	25%
Northwest	18%	18%	18%	18%
West	15%	15%	15%	15%
Southwest	18%	18%	18%	18%
Southeast	14%	14%	14%	14%

Source:

Interpolation of 2014 DC Background Study growth allocations forecast to align with Land Needs Background Study (2011-2031) planning period

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Table 11: Allocations of Total High Density Residential Construction by District

District	2011-2016	2016-2021	2021-2026	2026-2031
Northeast	0%	0%	0%	51%
North	19%	45%	48%	0%
Northwest	75%	9%	0%	0%
West	6%	0%	0%	0%
Southwest	0%	46%	52%	49%
Southeast	0%	0%	0%	0%

Source:
Interpolation of 2014 DC Background Study growth allocations forecast to align with Land Needs Background Study (2011-2031) planning period

The residential Greenfield unit demand allocation by District outlined above is compared to the Greenfield land available in each of the Districts. Table 12 summarizes the detailed units remaining by type in each of the Districts.

Table 12: Residential Units Remaining at 2021 and 2031 by District

District	Units Remaining at 2021 (10 years)			Units Remaining at 2031 (20 years)		
	Low	Medium	High	Low	Medium	High
Northeast	1,650	1,857	816	302	1,691	615
North	2,021	3,680	2,269	725	3,265	2,080
Northwest	1,556	2,491	2,979	623	2,193	2,979
West	1,579	1,375	931	490	1,126	931
Southwest	5,829	6,569	4,331	1,163	6,271	3,933
Southeast	1,570	2,281	2,428	533	2,048	2,428
Total	14,205	18,254	13,756	3,835	16,594	12,966

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Figure 3: Residential Units Remaining at 2021 by District

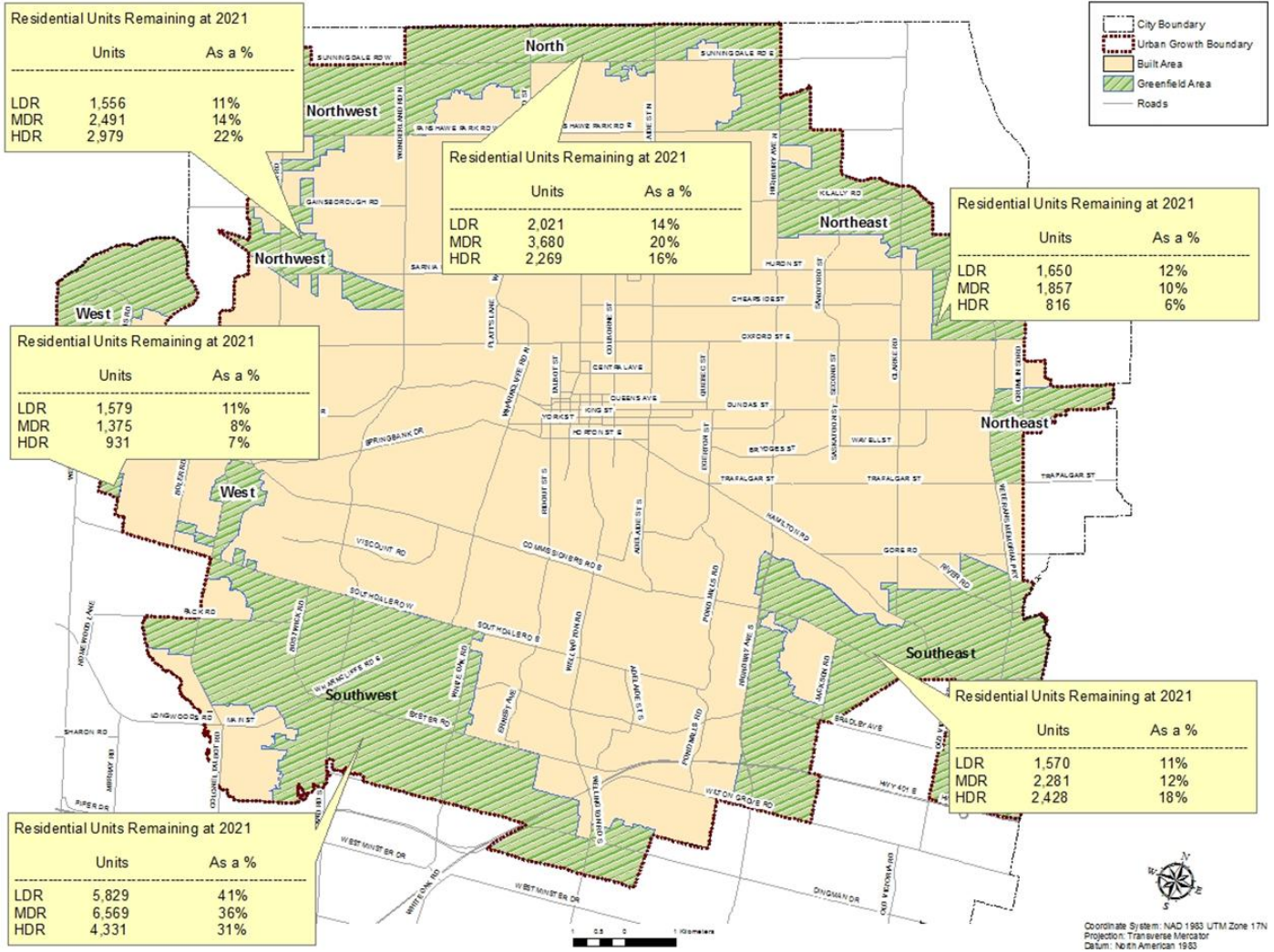
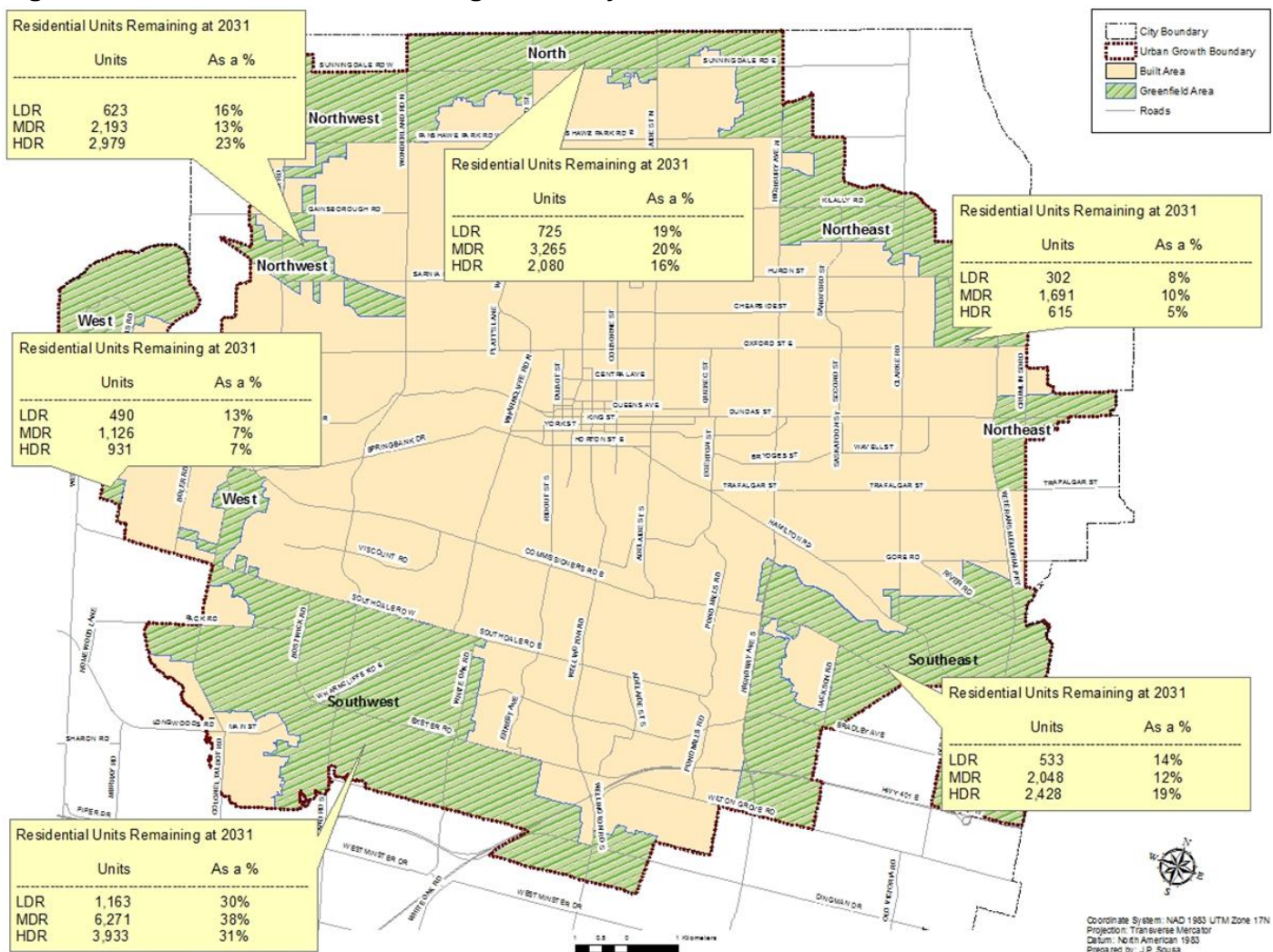


Figure 4: Residential Units Remaining at 2031 by District



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Housing choice in overall unit supply continues to exist city-wide beyond the 20 year period examined here. It should be noted that substantial housing supply of low density and medium density units in the Southwest remains by 2031. As previously indicated, development constraints have been relieved due to service capacity improvements at the Greenway Sewage Treatment Plant. Given recent and future anticipated infrastructure improvements additional lands would now be available in the Southwest for development purposes to address growth demands beyond the 20 year planning period.

Less choice exists for low density units in the Northeast and in the West for low and medium density units over the next 20 years as the continued development of lands within these Districts will take up the supply of available land for residential development. If demand persists, this could be an area to consider for the future expansion of the Urban Growth Boundary in conjunction with a review of the criteria to determine the best lands for future urban development.

Non-Residential Land Needs Analysis

Future commercial and institutional land needs for the planning period are also determined by conducting the supply versus demand analysis that was undertaken for the purposes of calculating residential lands needs. As indicated by the analysis summarized in Table 13, there is no demonstrated need for further expansion to the Urban Growth Boundary to accommodate growth on commercial or institutional land for the next 20 year reference period. However, the significance of the intensification assumptions used in the analysis should be highlighted. If institutional uses are not constructed within the Built Area, there will be a shortage of land available for development in the future. This is not anticipated given that the City’s major institutional employers, Western University, Fanshawe College, London Health Sciences Centre, St. Joseph’s Health Care London have lands associated with their campuses to accommodate future development. In addition, both Fanshawe College and Western University have indicated a desire to increase their presence in the downtown. This will be done by developing within existing buildings, such has been done by Western University in the Citi Plaza and Fanshawe College in a redevelopment on Dundas Street at Market Lane.

Table 13: Commercial and Institutional Land Needs Calculation

	Supply (ha)	Intensification		No Intensification Assumption	
		Demand (ha)	Supply minus Demand (ha)	Demand (ha)	Supply minus Demand (ha)
Commercial	295	65	230	108	187
Institutional	102	25	77	141	(39)

Industrial Land Needs Analysis

It should be noted that the review of industrial land requirements has been undertaken concurrently in a separate study to determine if there is a need to consider the addition of additional lands into the City’s established Urban Growth Boundary. The findings of the Industrial Lands Study recommend that the City of London would be best served by an expansion to its Urban Growth Area of approximately 500 hectares to enhance its industrial offerings. Such an expansion will increase the City’s industrial land reserves and safeguard future employment lands and the potential for continued industrial development.

DISCUSSION

The Land Needs Background Study has determined that the City will have a sufficient supply of residential and employment lands to meet anticipated future demands for the 20 year planning period. However, it is anticipated that during the next review of land needs for the City, additional land may be required to be included within the Urban Growth Boundary for future residential development. With this in mind, Staff recommends that a set of evaluation criteria be adopted by Council to assist in reviewing the merits of bringing additional land into the Urban Growth Boundary at such time as a boundary expansion is justified, consistent with both City and Provincial Policy.

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The following section summarizes the criteria to evaluate future considerations to expand the Urban Growth Boundary.

Economic/Technical

- What are the total costs of servicing the proposed additions to the Urban Growth Boundary?
- Can the existing or planned infrastructure required to accommodate the proposed expansion be provided in a financially and environmentally sustainable manner and consistent with any applicable City infrastructure master plan?
- What is the ability of existing or planned infrastructure to support the development of this expansion area? (Infrastructure includes matters such as pipes, public utilities, roads, transit, community facilities including schools and parks.)
- Is there a demonstrated need to add lands to the Urban Growth Boundary now? Associated with this criterion, and the City’s target inventory of vacant land, are there negative implications of the proposed addition on the current supply of vacant land?
- Are sufficient opportunities not available in the City to accommodate forecasted growth for the municipality within the Built Area and Greenfield Area?
- Will the timing of the expansion and the phasing of development within the proposed Urban Growth Boundary adversely affect the achievement of the intensification and density targets and other policies of the Official Plan?
- Does the proposed expansion of the Urban Growth Boundary support an emergent opportunity (e.g. a unique and substantial economic development opportunity of regional significance)?

Social

- What are the potential impacts on existing communities?
- Will the proposed expansion support the development of a sustainable transit oriented urban community?
- Is the lands proposed for expansion supportive of the City’s urban structure of centres and corridors?
- Will the proposed expansion support the development of a complete community?
- Is the expansion of sufficient size to be developed as a complete community by itself, or can it be integrated with existing development to contribute to a complete community?
- Is boundary of the proposed expansion is logical, readily identifiable and consistent with goals, objectives and policies of this Plan and represent a logical extension of the existing Urban Growth Boundary?
- Is the proposed expansion contiguous to the existing Urban Growth Boundary?

Environmental

- What are the potential effects on natural features and ecological functions?
- What are the potential impacts on agriculture?
- What are the potential impacts on mineral aggregate resources?

City staff also suggests consideration be given to a weighting system, whereby criteria would be assigned weighting based on their relative level of significance. For example, if it is determined that preservation of agriculture land and protection of natural heritage is of greater importance than another criterion it would be assigned a higher amount in the weighting system. Alternatively, it could be determined that development of complete communities was highly valued, and as such, would be assigned a higher amount in the weighting system.

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PROPOSED PROCESS / NEXT STEPS

Staff is recommending the following process related to the Land needs background study:

- **Public Consultation:** With Council direction, Staff will circulate the Land Needs Background Study and associated Staff report for public review and comment. An opportunity will be provided for the public and landowners, or their agents, to submit their lands to be included for consideration in the review of Urban Growth Boundary. Staff will receive the information for evaluation and report back to Council. The timeline for public consultation will be July – August 2013.
- **July 23, 2013 - Public Meeting** before Planning and Environment Committee to hear submissions regarding the Land Needs Background Study and requests for Urban Growth Boundary expansions.
- **August 20, 2013 – Public Participation Meeting** before Planning and Environment Committee to consider the Final Land Needs Background Study and recommendation regarding an expansion of the Urban Growth Boundary.

CONCLUSION

As demonstrated by the land needs analysis set out in this report and the Land Needs Background Study, and consistent with the Provincial Policy Statement and the policies of the City’s Official Plan, there is no need to consider the addition of new lands into the City’s Urban Growth Boundary through the 2011 Official Plan Review process. The City of London has a sufficient supply of both residential and non-residential land to meet development needs in the 15 to 20 year time horizon set out in the Official Plan and the 2005 Provincial Policy Statement. An adequate supply of land is available in all Districts of the City, allowing for the provision of choice in market location. Based upon current trends and assumptions, the City currently has enough residential land to accommodate its projected growth over the next 20 years. At the end of the 20 year planning period there would still be a 3 year supply of low density residential lands, a 48 year supply of medium density residential lands, and a 20 year supply of high density residential lands.

It is anticipated that during the next land needs analysis, the City may need to consider including additional land within the Urban Growth Boundary. Based on the anticipation that revisions to the Urban Growth Boundary may be necessary, City staff recommends that a set of evaluation criteria be adopted by Council to assist in reviewing the most appropriate lands to be considered for inclusion within the Urban Growth Boundary. The criteria may also include a weighting system to allow each criterion to be assigned a value based on their relative importance.

There will be additional opportunities to review land requirements to accommodate development on an ongoing basis. In accordance with the provisions of the Planning Act, Council may determine the need to review the Official Plan every five years. During the municipal comprehensive review process, city staff will revisit population, housing and employment forecasts and determine if adjustments are required to address changes to growth patterns, market conditions and the broader legislative context. Should these updated forecasts demonstrate the need to include revisions to the urban growth boundary, Council will be afforded the opportunity to reconsider them at that time. Opportunities also exist for Council to initiate a comprehensive review of the land supply at any time, if it has been determined that there is a need to review expansions to the Urban Growth Boundary.

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May 9, 2013
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Appendix A