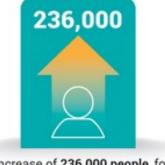


City of Hamilton Land Needs Assessment to 2051 Addendum to March 2021 Technical Working Paper

Context for Land Needs Discussion

- Significant growth driven by attractiveness of the City-region to newcomers
- Mandated Forecasts have been in close range of Census actuals
- Ambitious Density Scenario embodies strong growth management principles
- Level of policy intervention is high not a purely 'market-based' approach
- Represents a very aggressive approach to conformity with the Growth Plan



An increase of 236,000 people, for a total population of 820,000 people



An increase of 122,000 jobs, for a total employment of 360,000 jobs



Mandated Provincial Method



- Inputs may be subjective, but must be based on sound evidence
- Requires the preparation of a forecast of housing by type
- Household formation is fundamentally a social construct
- Driven by long-standing demographic patterns
- Market-based forecast takes into account age-structure – including 'empty-nesters' downsizing

Apartments
Preferred by younger
age groups

Family Formation
Begins through the late 20s and 30s with home ownership

"Downsizing"
In the 70s to 80s for health reasons or the death of a spouse



Age is a major indicator of housing choice by type



Approach to the Analysis



Policy and target-based approach is taken

Growth Plan Objectives

A Primary Objective of the *Growth Plan* is to optimize the use of existing urban lands to avoid over-designating lands for future urban use for Employment and Residential use Intensification

Objective is to be achieved through an "Intensification First" approach to limit the amount of new housing units and associated lands in the Designated Greenfield Area

Minimum 50% Target

All of the main LNA scenarios involve policy intervention. No purely 'market based' scenario is likely to have the unit mix required to meet the Growth Plan minimum intensification target

- Market-based does not mean development unconstrained by land use planning policy
- Challenge is to maximize the tolerance of the market to policy intervention without jeopardizing Schedule 3 forecasts



Peer Review Results



Key issues are addressed in the Addendum Report



Composition of Development Inside the Built-Up Area



City-wide DGA Metrics and Change for the LNA Scenarios



Suitability of Employment Areas to Accommodate Forecast Growth



Employment
Density
Assumptions

- Notion of "Market" versus "Policy-based" LNA is critical
- LNA does not attempt to forecast different 'market-based' trends for each scenario
- Scenarios reflect the required outcomes of increasingly aggressive intensification and density targets
- Hamilton is well-positioned for success



Community Area Land Needs

- Forecast of detached SDU's prepared based on available information
- For the Ambitious Density Scenario, land needs reduced from 1,340 to 1,310 ha
- Updates to unit distribution inside Built-up Area do not change land needs
- "No Expansion Scenario" results in shortfall of 59,300 ground-related units
- Remain of the view that no expansion does not meet Provincial requirements



Smaller - 500 sq.ft



Mid- 1,000 sq.ft



Larger – 1,500 sq.ft



Employment Area Land Need

- Underpinned by a more optimistic office growth outlook
- Density assumptions are in accordance with Growth Plan policy
- Many factors could shift the current balance into a shortage position
- City will need to monitor land supply going forward
- Actions are required to ensure an efficient use of existing urban lands.



Bayfront Intensification



Major Office Outlook



Goods Movement

