

An aerial photograph of a landscape, likely in the Town of Halton Hills. The image shows a river or stream flowing through a valley, surrounded by green fields and some buildings. The left side of the image is a solid dark blue background where the text is located.

TOWN OF
HALTON HILLS

Regional IGMS Implications

Prepared By: SGL Planning & Design Inc.
July 2021



Presentation Outline



- IGMS Overview
- Farmland in Halton Hills
- Intensification Implications
- Employment Implications
- Community Facility Implications
- Financial Implications
- Key Takeaways
- Next Steps





IGMS Overview

IGMS Overview

Concept 1: 60% Densification / Moderate Greenfield Expansion

- 50% densification to 2031 then 60% densification* to 2051
- Lower share of employment growth in Employment Areas relative to Concept 4

10% DGA Densification
in apartments

Concept 2: 70% Densification / Limited Greenfield Expansion

- One-half the amount of new community DGA of Concept 1
- 70% densification* (2031-51)
- Share of employment growth in Employment Areas midway between Concepts 1 and 3

17% DGA Densification
in apartments

Concept 3: 80% Densification / Employment Area Only Greenfield Expansion

- Build out of existing DGA only
- About 80% densification* (2031-51)
- Least share of employment growth in Employment Areas
- **Concept 3B: No Employment Expansion**

24% DGA Densification
in apartments

Concept 4: 50% Intensification / Greatest Amount of Greenfield Expansion

- 50% intensification in BUA (2021-51)
- Greatest share of employment growth in Employment Areas

2.5% DGA Densification
in apartments

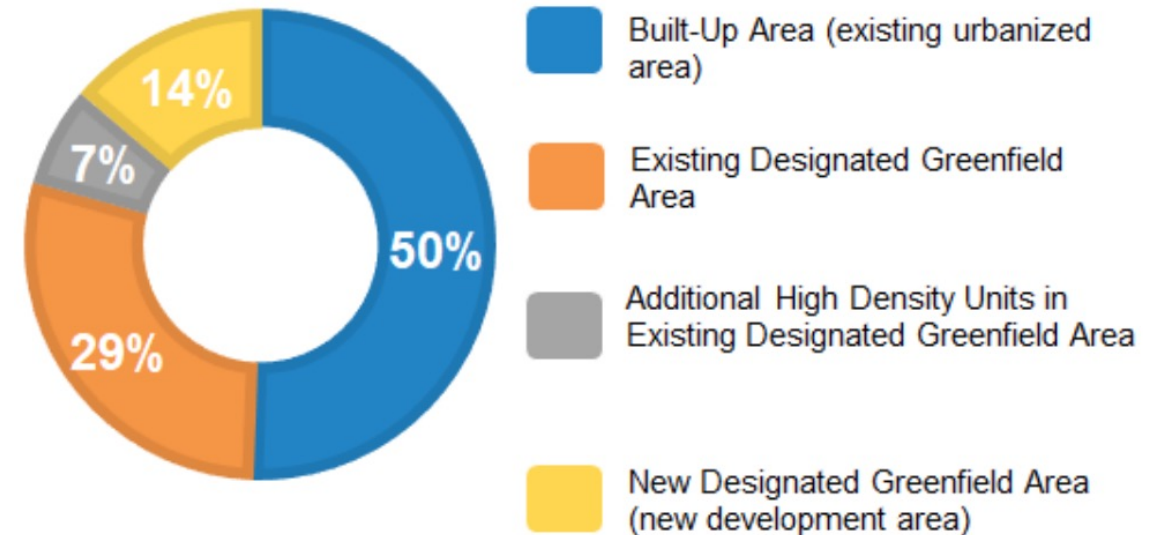
Concept 1

- Min. 50% of all new housing inside built boundary
- 10% densification – 2031-2051
- DGA at 65 persons & jobs per ha
- 95,600 Apartments
- 78,300 Ground-related
- Emissions per new population – 6.23

Employment

- Total Est. Regional DGA – 1170 ha (2891 acres)
- Halton Hills Est. DGA – 680 ha (1680 acres)

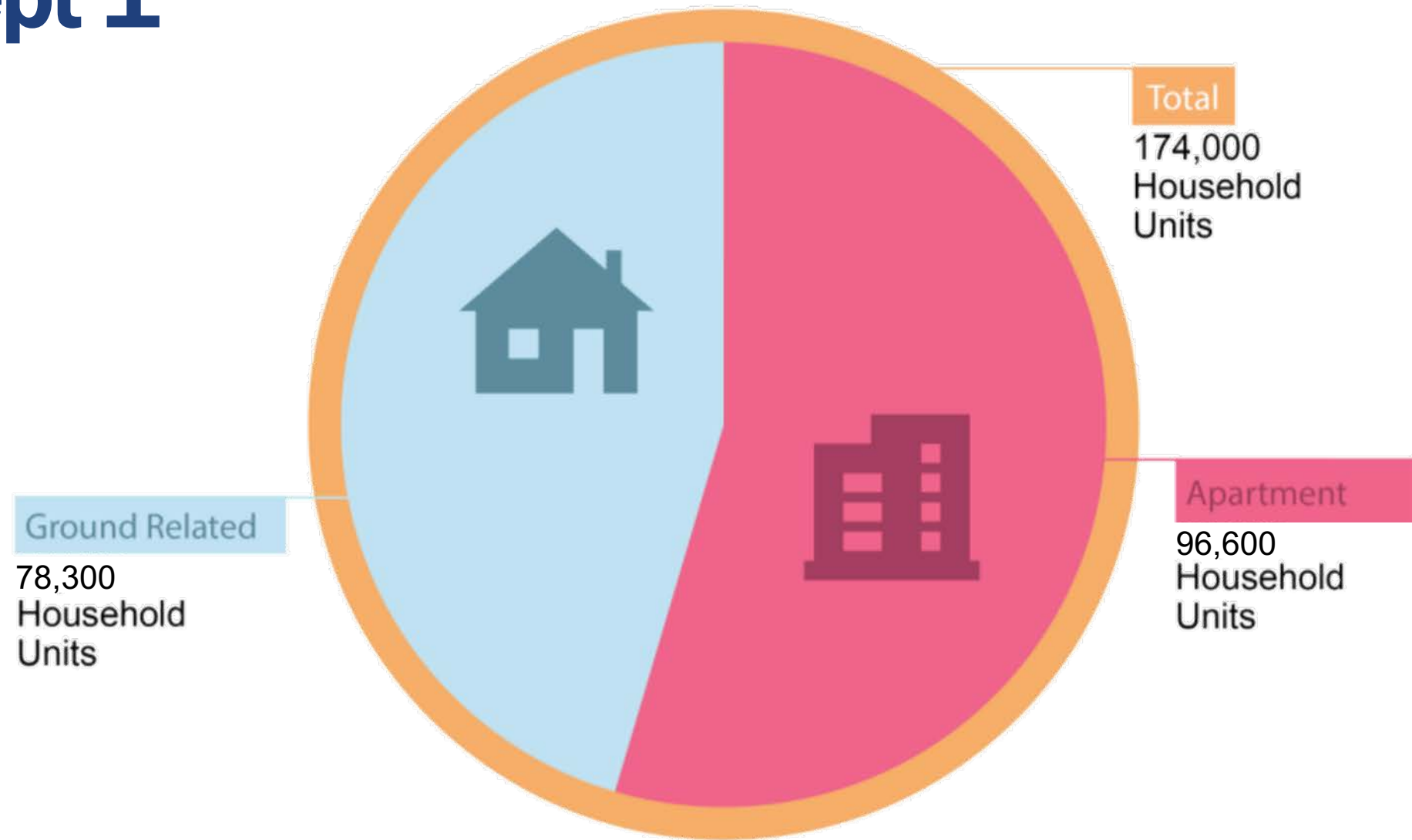
CONCEPT 1: LOCATION OF HALTON'S HOUSING GROWTH
2021-2051



Community

- Total Est. Regional DGA – 1460 ha (3607 acres)
- Halton Hills Est. DGA – 740 ha (1828 acres)

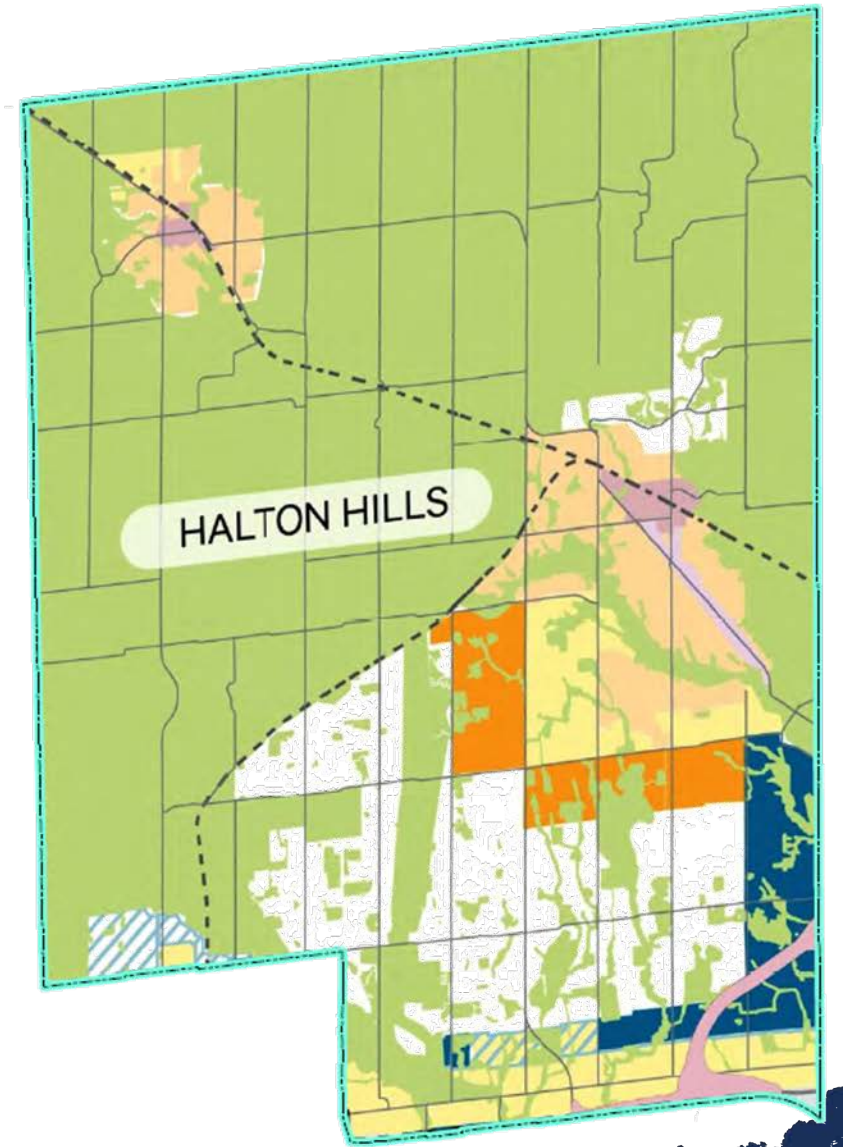
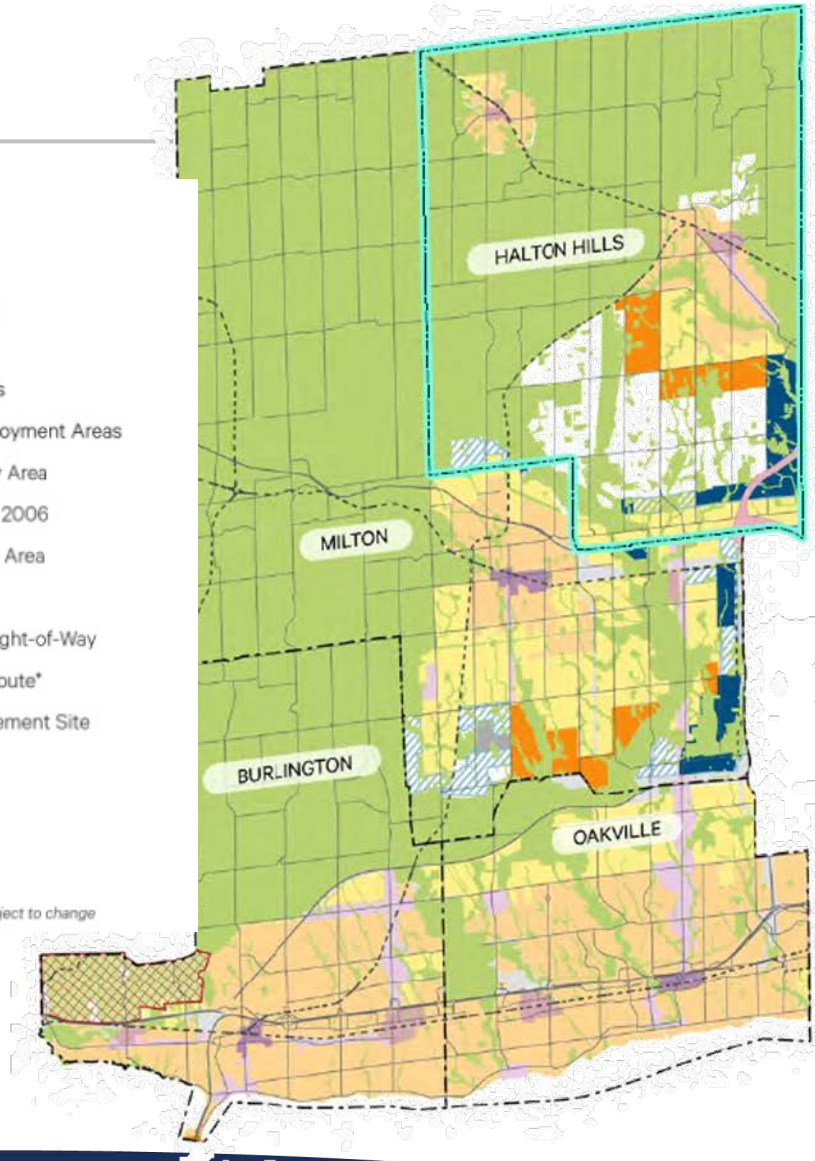
Concept 1



Concept 1

- Community Area
- Employment Area
- Nodes and Corridors
- MTSA
- Urban Growth Centers
- Future Strategic Employment Areas
- North Aldershot Policy Area
- Existing Built-Up Area 2006
- Designated Greenfield Area
- Greenbelt/NHS
- Parkway Belt Hydro Right-of-Way
- GTA West Preferred Route*
- Halton Waste Management Site
- City/Town Borders
- Roads
- Rail

*Current preferred route, subject to change



- Includes 2 Vision Georgetown

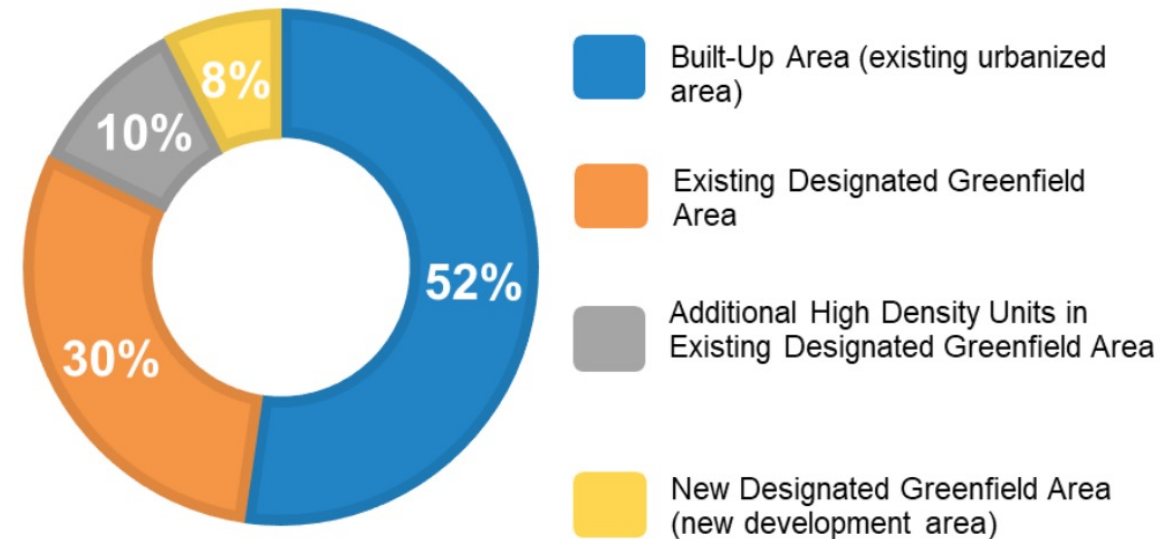
Concept 2

- Min. 50% all new housing inside built boundary
- 20% densification 2031-2051
- DGA at 65 persons & jobs per ha
- 106,700 Apartments
- 68,000 Ground-related
- Emissions per new population – 6.16

Employment

- Total Est. Regional DGA – 1,100 ha (2718 acres)
- Halton Hills Est. DGA – 500 ha (1235 acres)

CONCEPT 2: LOCATION OF HALTON'S HOUSING GROWTH
2021-2051

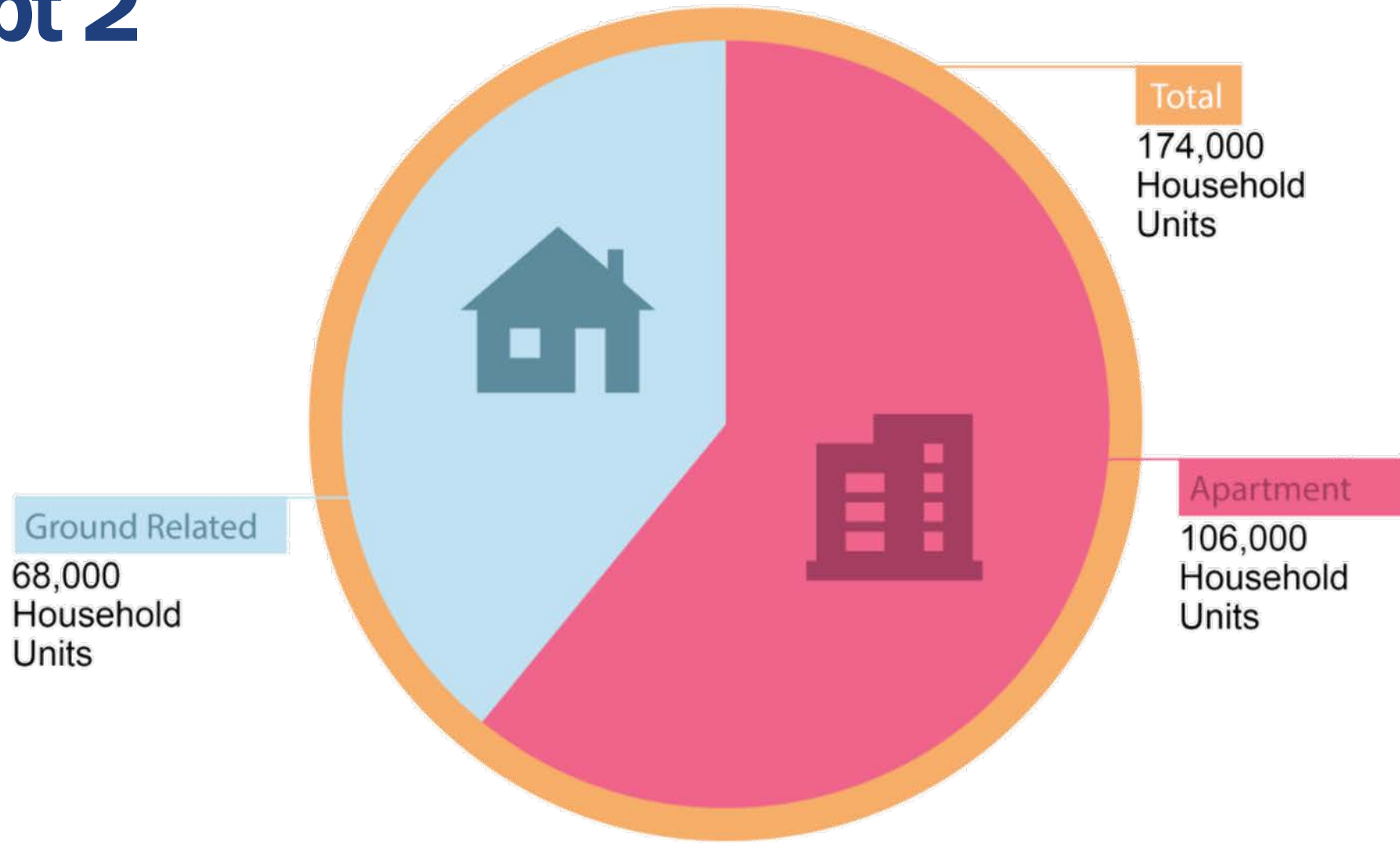


Community

- Total Est. Regional DGA – 730 ha (1804 acres)
- Halton Hills Est. DGA – 330 ha (815 acres)

Household Unit Growth, 2021-2051

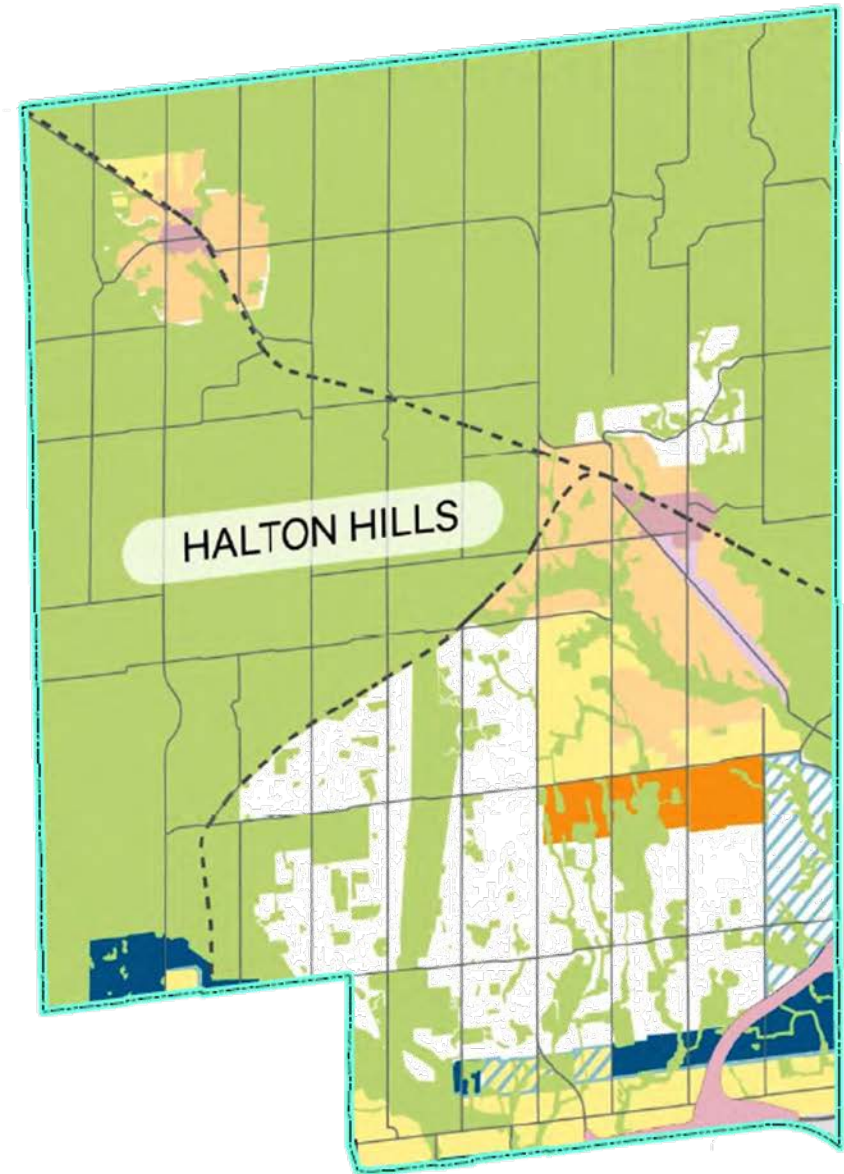
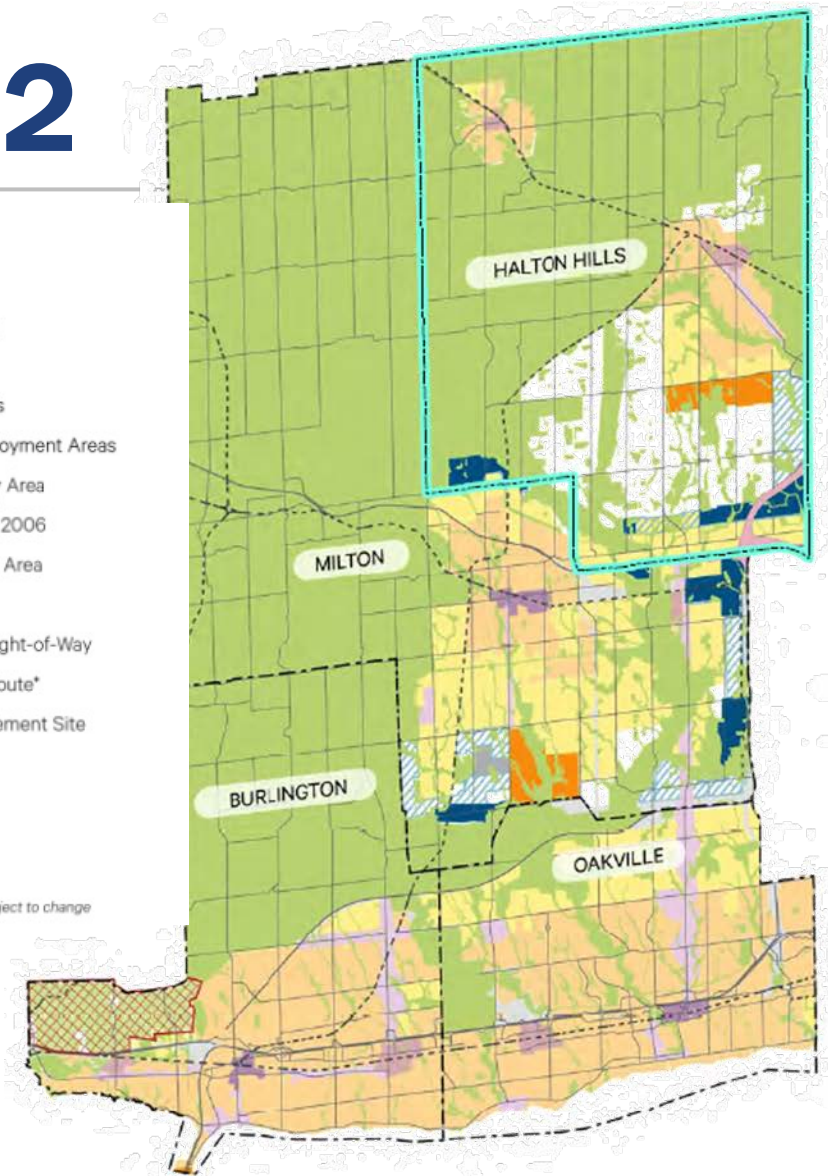
Concept 2



Concept 2

- Community Area
- Employment Area
- Nodes and Corridors
- MTSA
- Urban Growth Centers
- Future Strategic Employment Areas
- North Aldershot Policy Area
- Existing Built-Up Area 2006
- Designated Greenfield Area
- Greenbelt/NHS
- Parkway Belt Hydro Right-of-Way
- GTA West Preferred Route*
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- City/Town Borders
- Roads
- Rail

*Current preferred route, subject to change



- Includes 1 Vision Georgetown

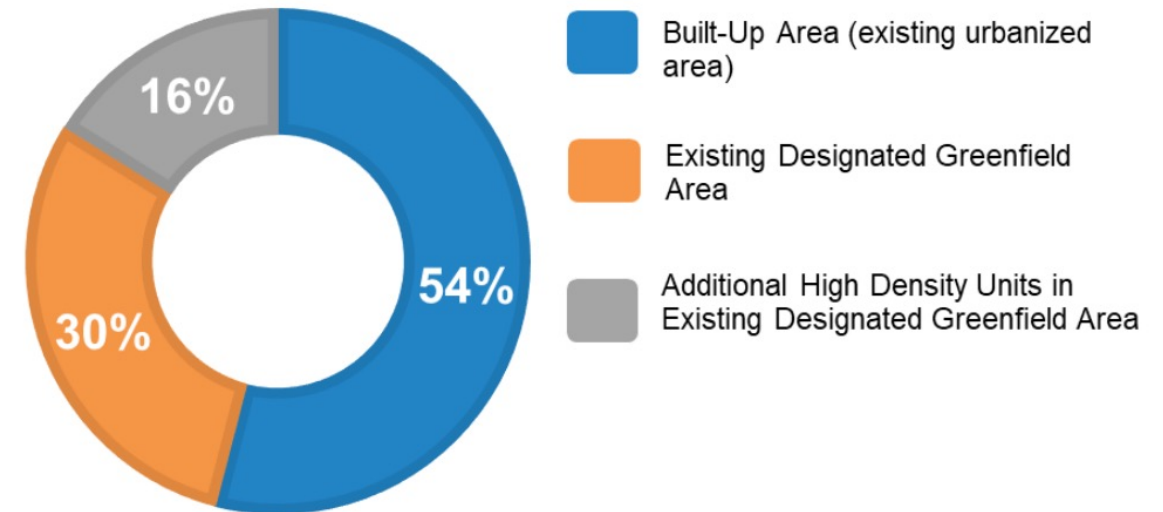
Concept 3

- Min. 50% all new housing inside built boundary
- 30% densification 2031-2051
- 118,200 Apartments
- 56,000 Ground-related
- Emissions per new population – 6.08

Employment

- Total Est. Regional DGA – 980 ha (2422 acres)
- Halton Hills Est. DGA – 450 ha (1112 acres)

CONCEPT 3: LOCATION OF HALTON'S HOUSING GROWTH
2021-2051

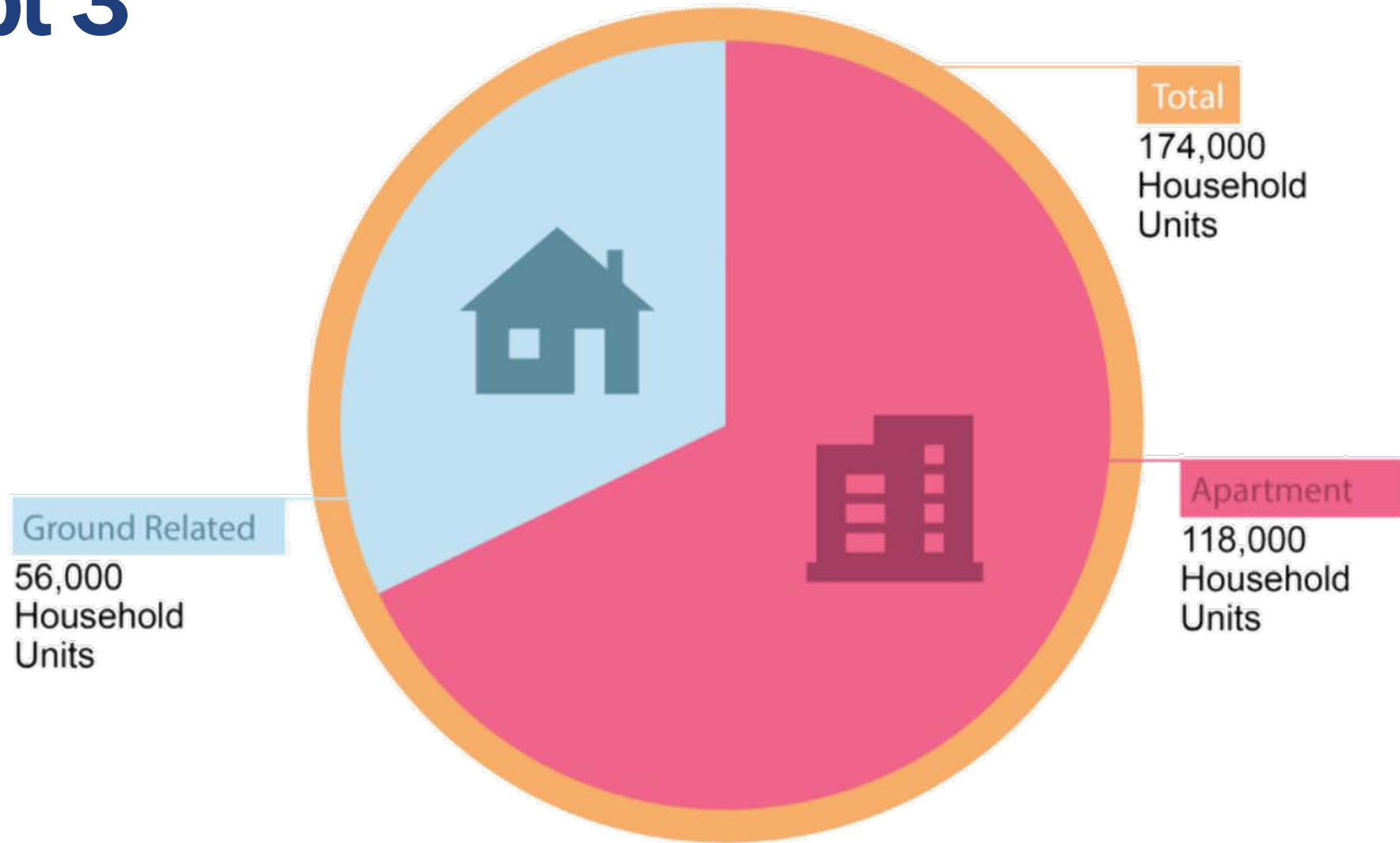


Community

- Total Est. Regional DGA – 0 ha (0 acres)
- Halton Hills Est. DGA – 0 ha (0 acres)

Household Unit Growth, 2021-2051

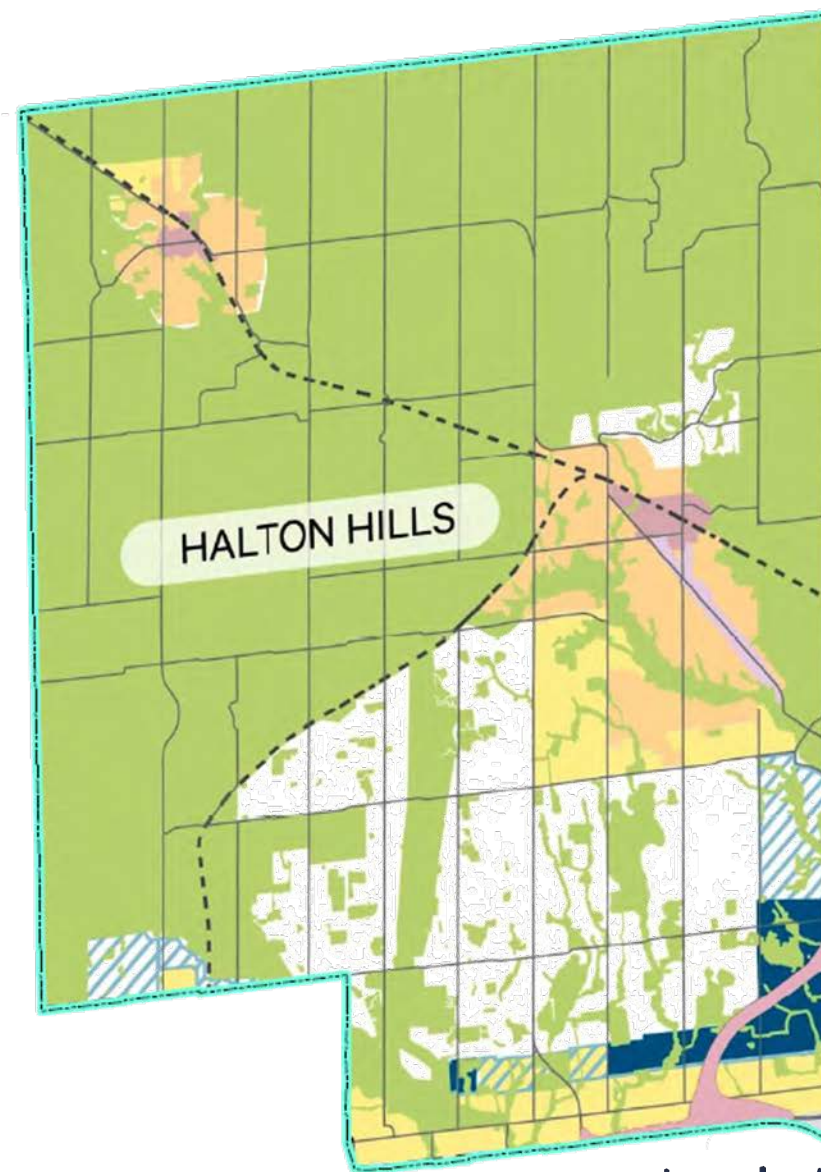
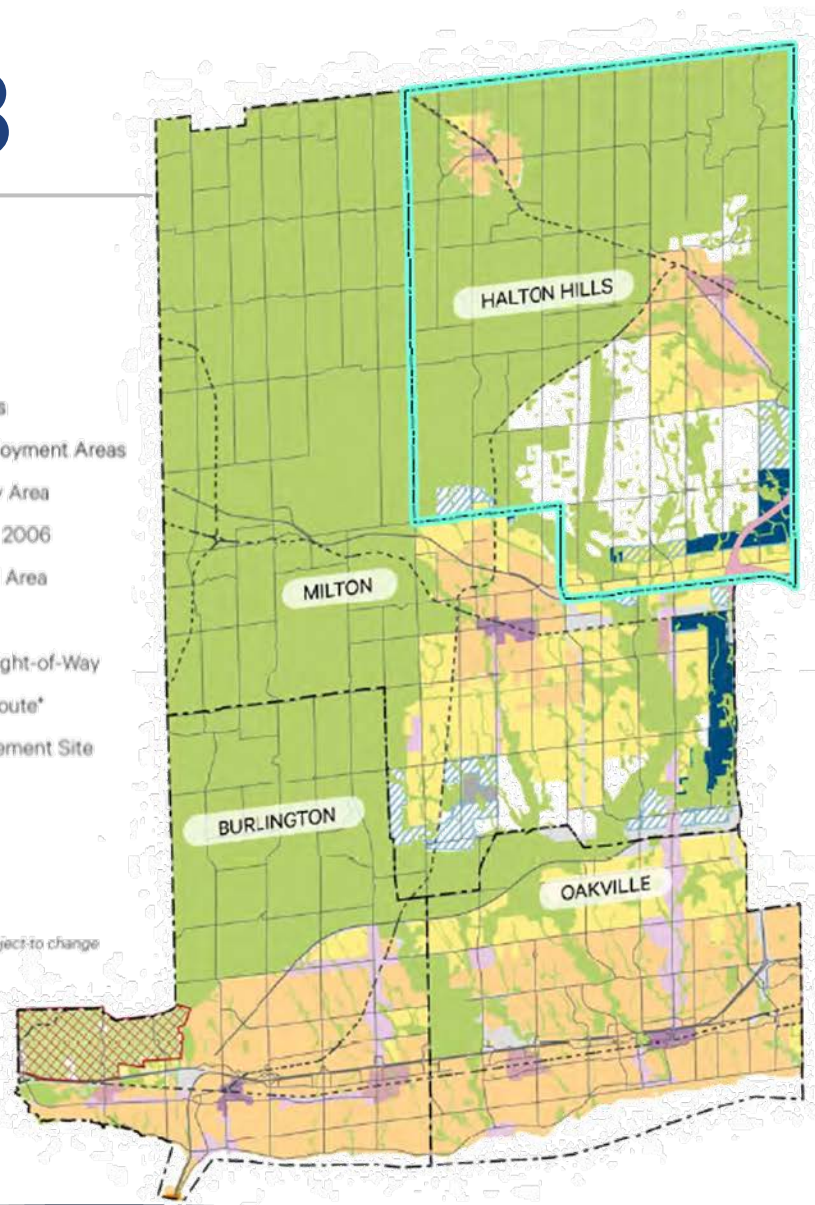
Concept 3



Concept 3

- Community Area
- Employment Area
- Nodes and Corridors
- MTSA
- Urban Growth Centers
- Future Strategic Employment Areas
- North Aldershot Policy Area
- Existing Built-Up Area 2006
- Designated Greenfield Area
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- GTA West Preferred Route*
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*Current preferred route, subject to change



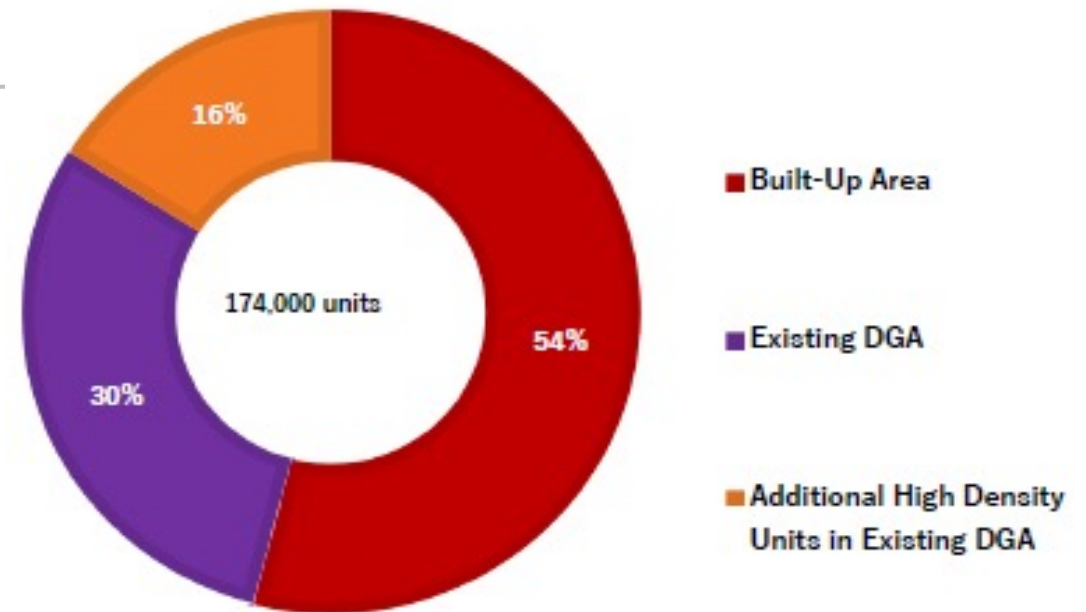
Concept 3 B

- Min. 50% all new housing inside built boundary
- 30% densification 2031-1051
- 111,800 Apartments
- 56,000 Ground-related
- Emissions per new population – 6.08

Employment

- Total Est. Regional DGA – 0 ha (0 acres)
- Halton Hills Est. DGA – 0 ha (0 acres)

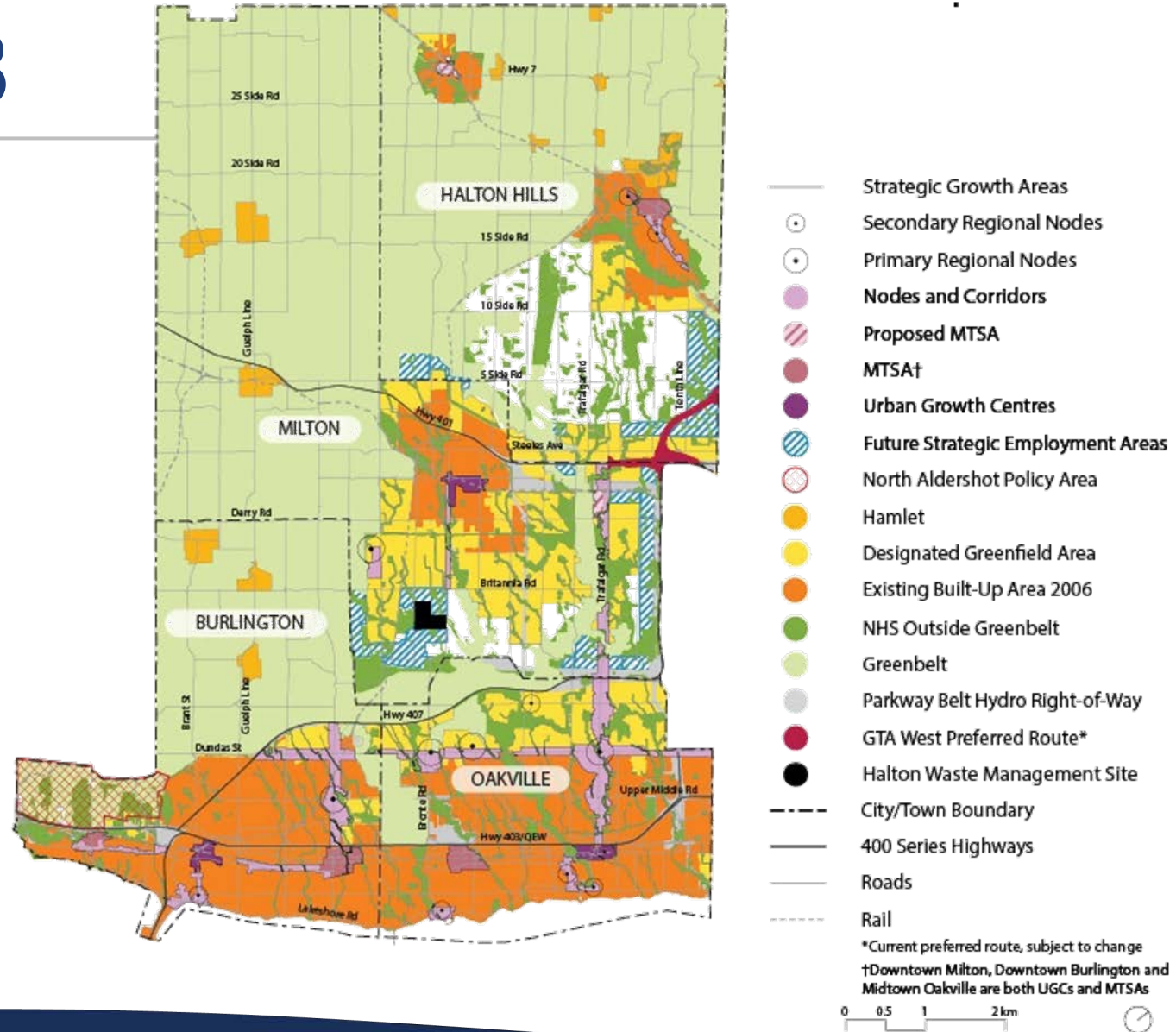
Concept 3: Location of Halton's Housing Growth
2021-2051



Community

- Total Est. Regional DGA – 0 ha (0 acres)
- Halton Hills Est. DGA – 0 ha (0 acres)

Concept 3 B



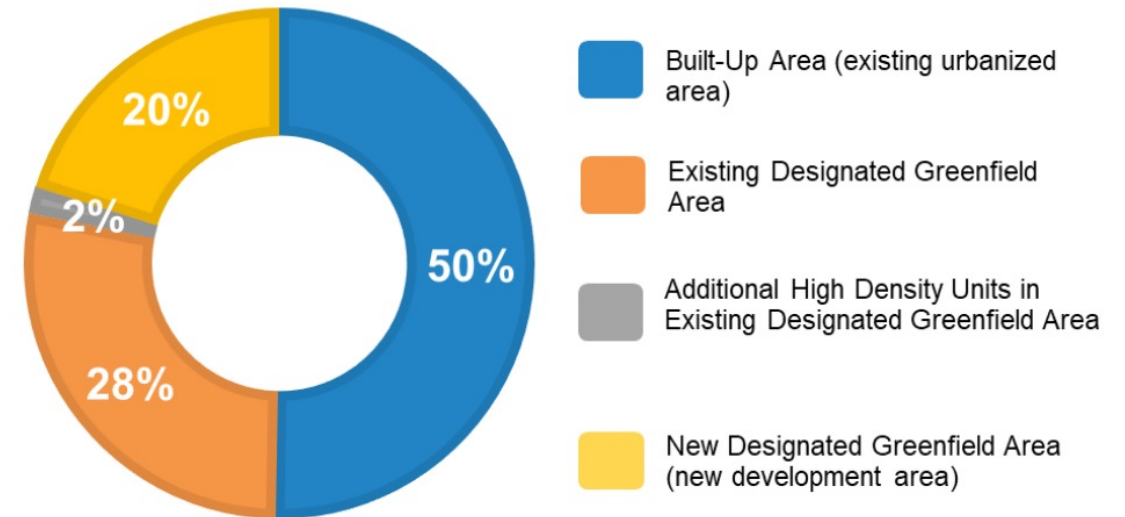
Concept 4

- Min. 50% all new housing inside built boundary
- DGA at 65 persons & jobs per ha
- 84,000 Apartments
- 89,200 Ground-related
- Emissions per new population – 6.29

Employment

- Total Est. Regional DGA – 1220 ha (3015 acres)
- Halton Hills Est. DGA – 670 ha (1656 acres)

CONCEPT 4: LOCATION OF HALTON'S HOUSING GROWTH
2021-2051

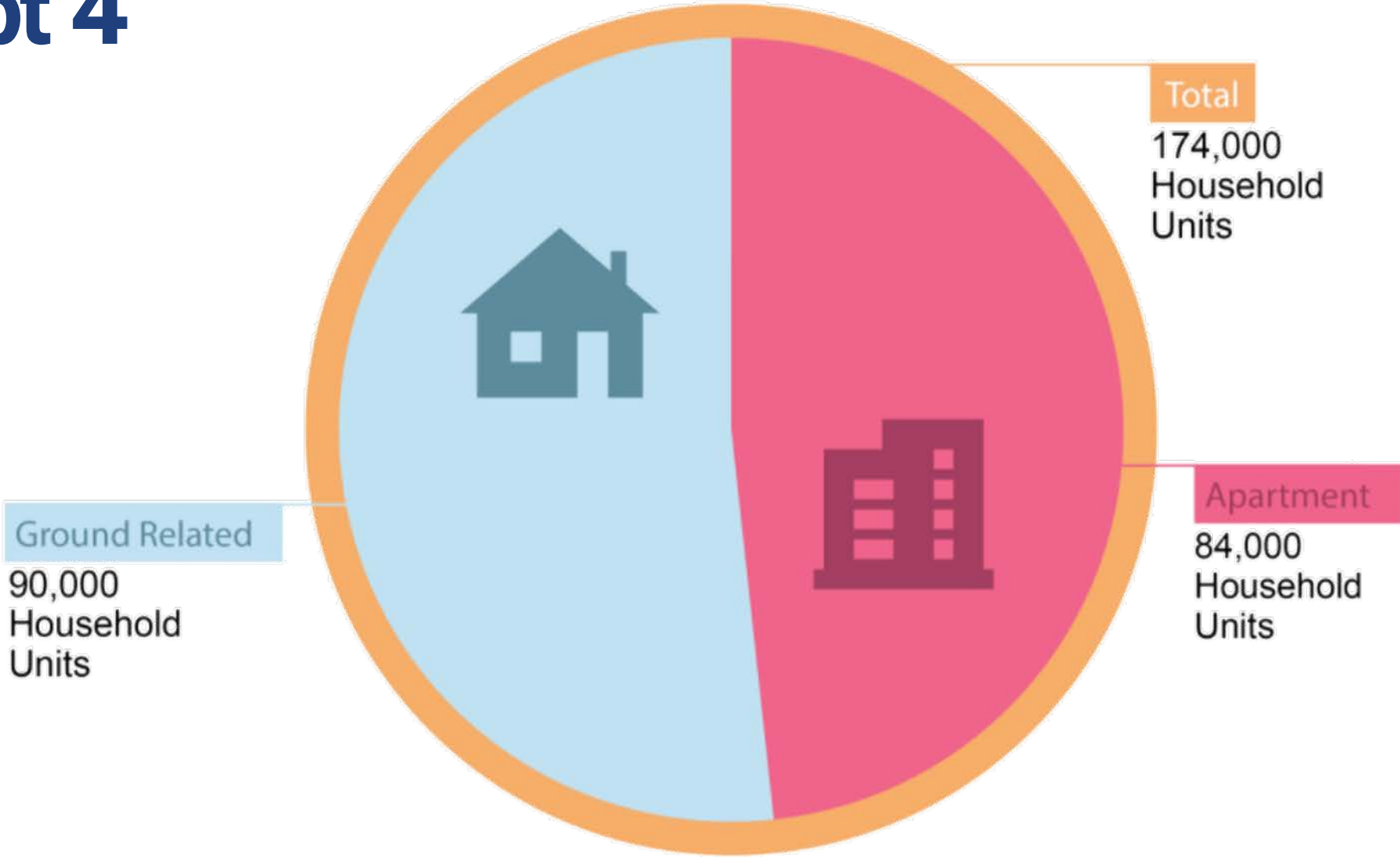


Community

- Total Est. Regional DGA – 2080 ha (5140 acres)
- Halton Hills Est. DGA – 1360 ha (3360 acres)

Household Unit Growth, 2021-2051

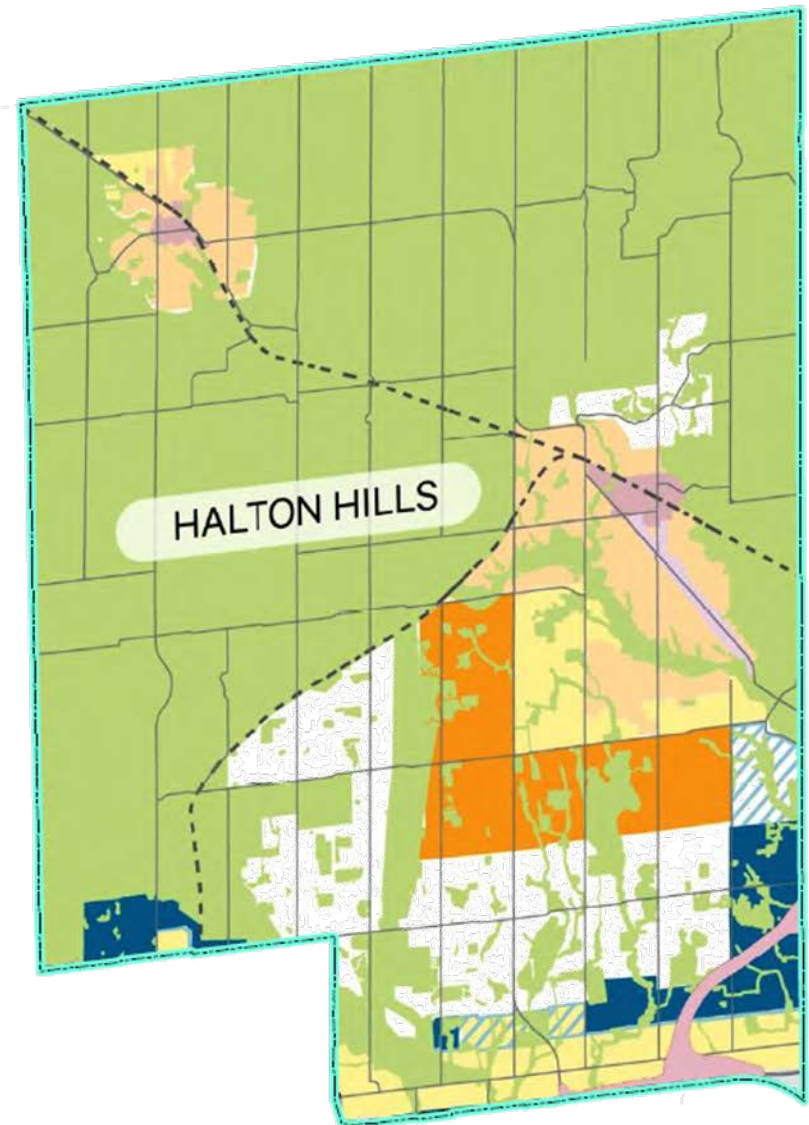
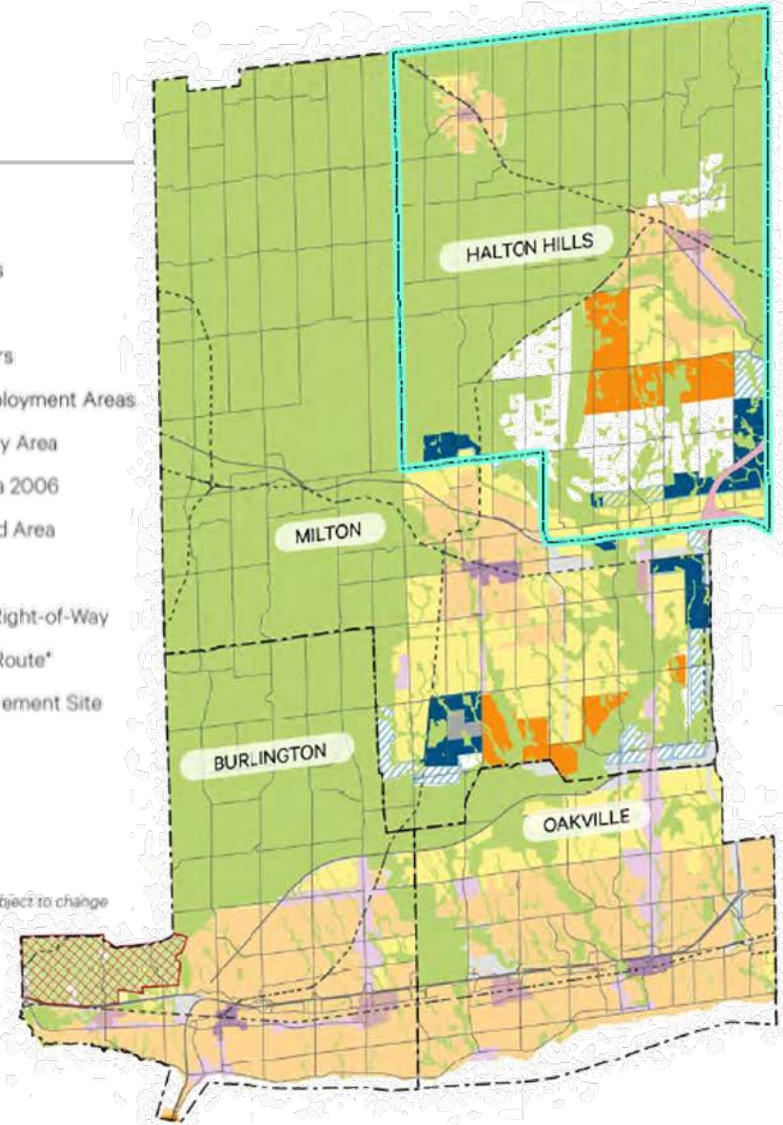
Concept 4



Concept 4

- Community Area
- Employment Area
- Nodes and Corridors
- MTSA
- Urban Growth Centers
- Future Strategic Employment Areas
- North Aldershot Policy Area
- Existing Built-Up Area 2006
- Designated Greenfield Area
- Greenbelt/NHS
- Parkway Belt Hydro Right-of-Way
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*Current preferred route, subject to change

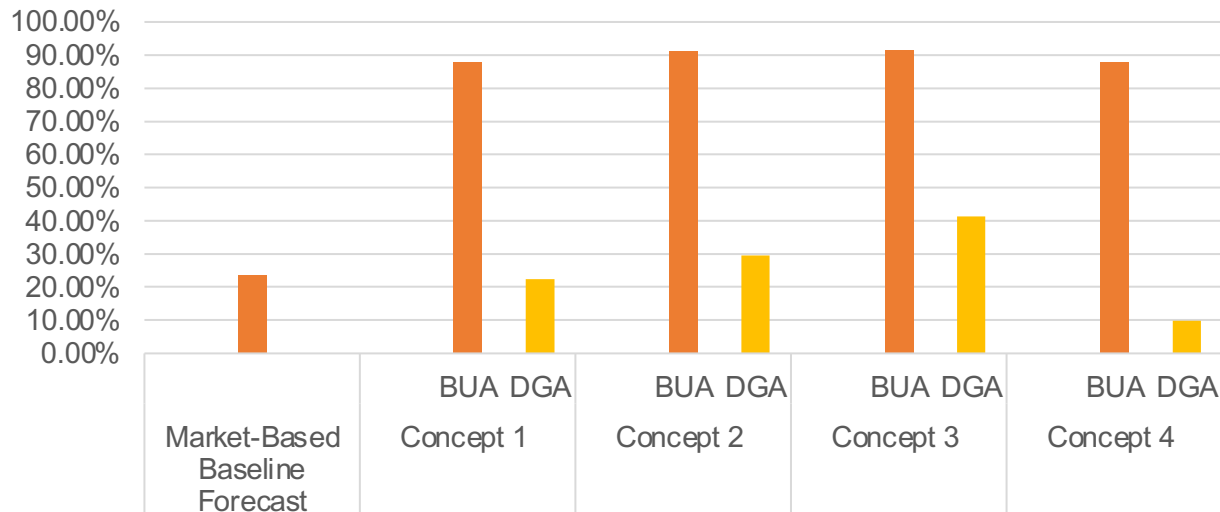


- Includes 3-4
Vision
Georgetown

Apartment Unit Forecast

- Market based housing predominantly ground related
- Requires significant shift in market for apartment units to achieve Growth Plan requirement of 50% intensification
- Additional shift required in Concept 2 and 3
- Significant shift in DGA apartments in Concepts 1, 2 and 3

Percent of Apartment Growth Within Built Up Areas and Designated Greenfield Areas, by Growth Concept, 2021 to 2051



Housing Mix by Policy Area for Each Growth Concept and the Market-Based Baseline Forecast

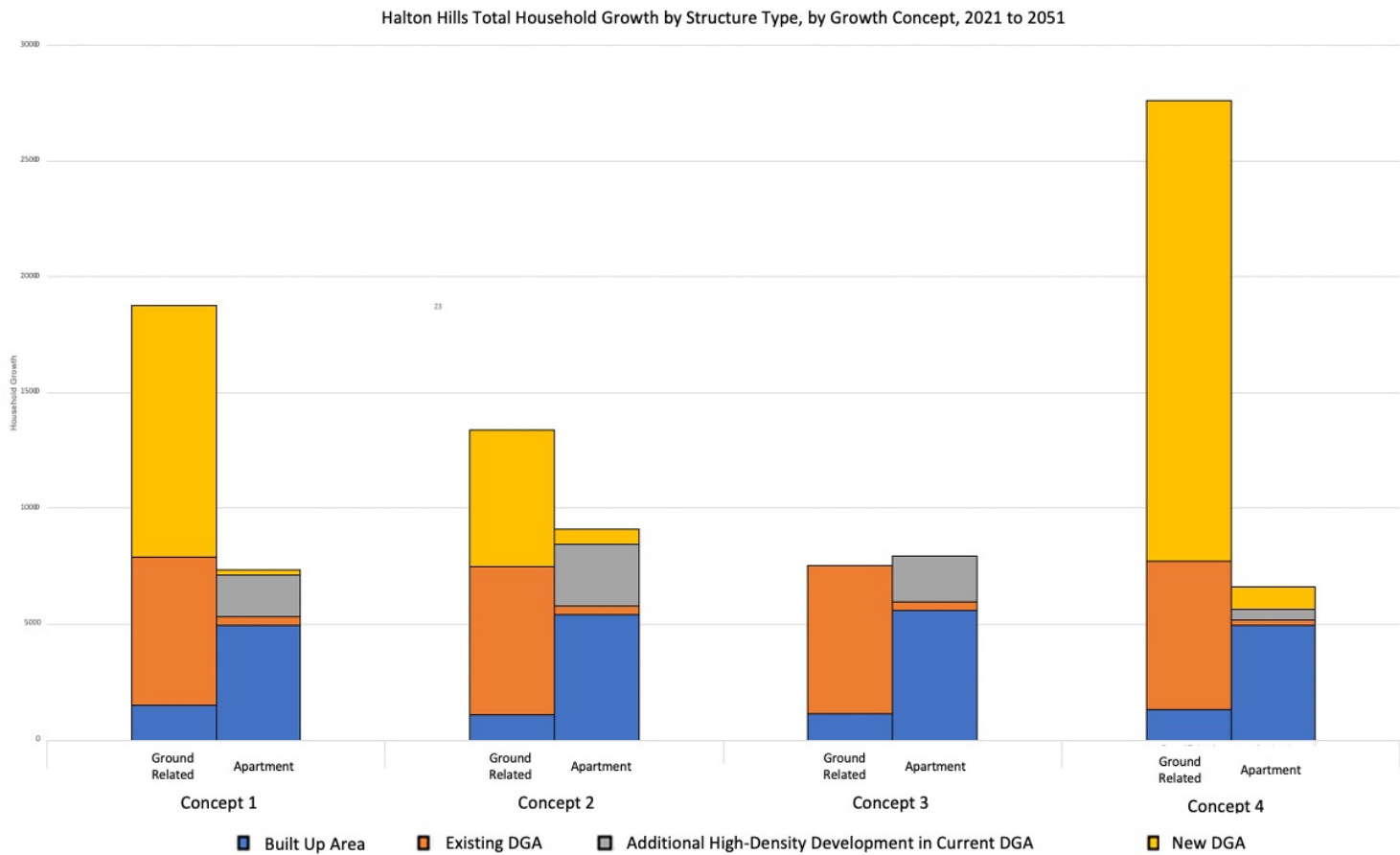
Region of Halton Mix of 2021 to 2051 Housing Growth by Policy Area for Each Growth Concept and the Market-Based Baseline Forecast			
Growth Concept and Policy Area	Ground Related Units	Apartment Building Units	Total Units
Market-Based Baseline Forecast			
Total Housing Growth	76.4%	23.6%	100%
Concept 1			
Rural	100.0%	0.0%	100.0%
Intensification	12.2%	87.8%	100.0%
Designated Greenfield Area	77.5%	22.5%	100.0%
Mix of Total Housing Growth	45.0%	55.0%	100.0%
Concept 2			
Rural	100.0%	0.0%	100.0%
Intensification	8.7%	91.3%	100.0%
Designated Greenfield Area	70.5%	29.5%	100.0%
Mix of Total Housing Growth	38.7%	61.3%	0.0%
Concept 3			
Rural	100.0%	0.0%	100.0%
Intensification	8.5%	91.5%	100.0%
Designated Greenfield Area	58.7%	41.3%	100.0%
Mix of Total Housing Growth	32.1%	67.9%	0.0%
Concept 4			
Rural	100.0%	0.0%	100.0%
Intensification	12.2%	87.8%	100.0%
Designated Greenfield Area	90.1%	9.9%	100.0%
Mix of Total Housing Growth	51.2%	48.8%	0.0%

Source: Hemson Consulting Ltd.

Location of Halton Hills Housing Growth by Structure Type, by Growth Concept, 2031-2051

Total Household Growth by by Land Use Area, 2021 - 2051				Total Household Growth by by Land Use Area, 2021 - 2051			
Town of Halton Hills				Town of Halton Hills			
Built-Up Area				Existing DGA			
	Ground Related	Apartment	Total		Ground Related	Apartment	Total
Concept 1	1,510	4,960	6,470	Concept 1	6,390	370	6,760
Concept 2	1,100	5,400	6,500	Concept 2	6,390	370	6,760
Concept 3	1,130	5,610	6,740	Concept 3	6,390	370	6,760
Concept 4	1,330	4,960	6,290	Concept 4	6,390	230	6,620

Total Household Growth by by Land Use Area, 2021 - 2051				Total Household Growth by by Land Use Area, 2021 - 2051			
Town of Halton Hills				Town of Halton Hills			
Additional High Density Development in Current DGA				New DGA			
	Ground Related	Apartment	Total		Ground Related	Apartment	Total
Concept 1	0	1,790	1,790	Concept 1	10,880	250	11,130
Concept 2	0	2,690	2,690	Concept 2	5,880	650	6,530
Concept 3	0	1,950	1,950	Concept 3	0	0	0
Concept 4	0	450	450	Concept 4	19,890	950	20,840



- Ground related in New DGA ranges from 0 to 19,890 units
- Apartments in BUA range from 4,960 in Concept 4 to 5,610 in Concept 3
- Apartments in existing DGA change from 450 in Concept 4 to 2,690 in Concept 2

**1200
metres**

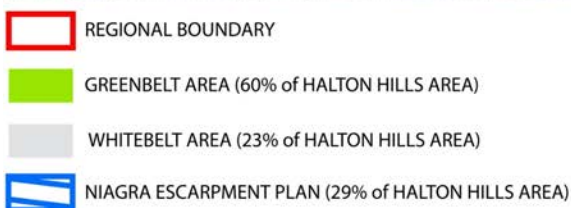
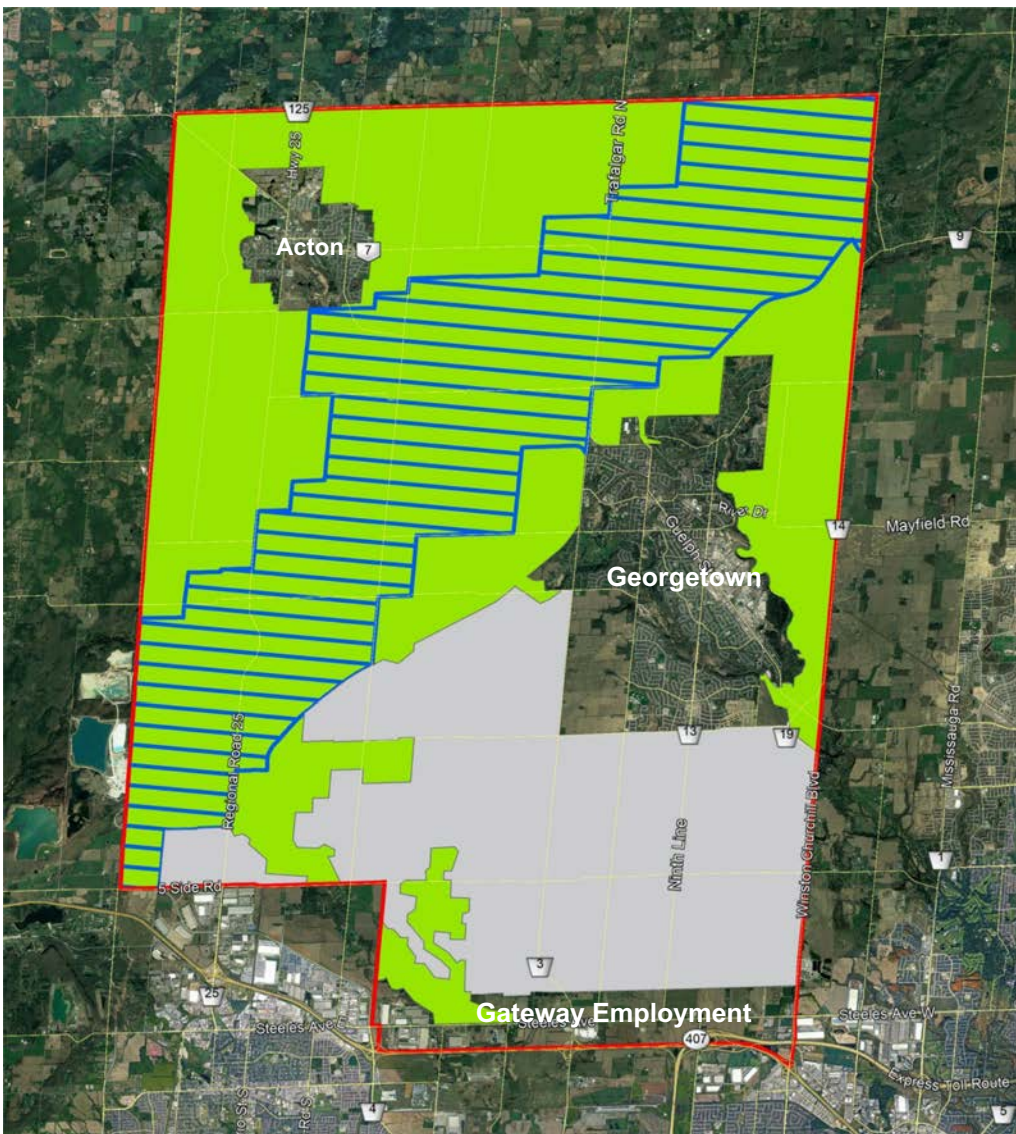


15 Minute Neighbourhoods

- Compact community
- Ability to walk to daily needs, services and jobs
- Addresses climate change



Farmland in Halton Hills



Farmland

in Halton Hills



- 180 farms in 2016
 - (up by 7% between 2011-2016)
- 60% Greenbelt Area
 - 29% is Niagara Escarpment
- 23% White belt Area
- 83% Total Rural Area
- 2% Glen Williams
- 15% Urban Area

Farmland

in Halton Hills

	Whitebelt Total	Concept 1	Concept 2	Concept 3	Concept 3B	Concept 4
Area	6,400 ha (15815 acres)	1,420 ha (3509 acres)	830 ha (2051 acres)	450 ha (1112 acres)	0ha (0 acres)	2,030 ha (5016 acres)
% of Whitebelt Area remaining		78%	87%	93%	100%	68%
% of Halton Hills occupied by Concepts		5.1%	2.9%	1.6%	0%	7.3%



McGibbon Condos

Intensification Implications

Past & Future Rates of Intensification

Hemson Market Assessment, 2019

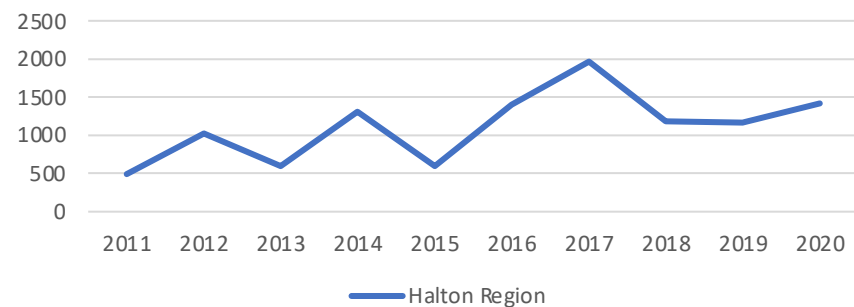
- Intensification 2016-2021 – 100 units per year
- OP target of 5,100 units by 2031 unlikely to be achieved

Hemson IGMS, 2021

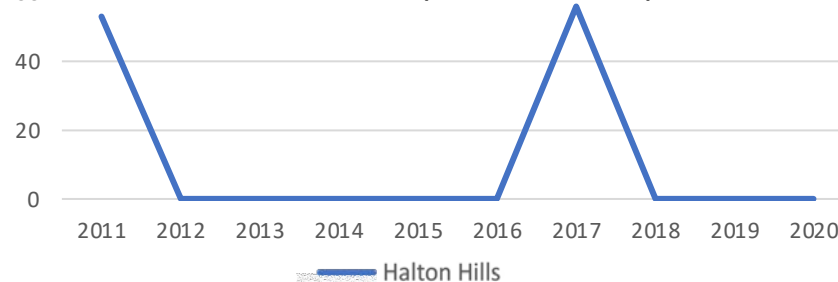
- 50% intensification target will require more intense development
- 210 to 225 units per year after 2021
- Will require a shift in pattern of housing choice



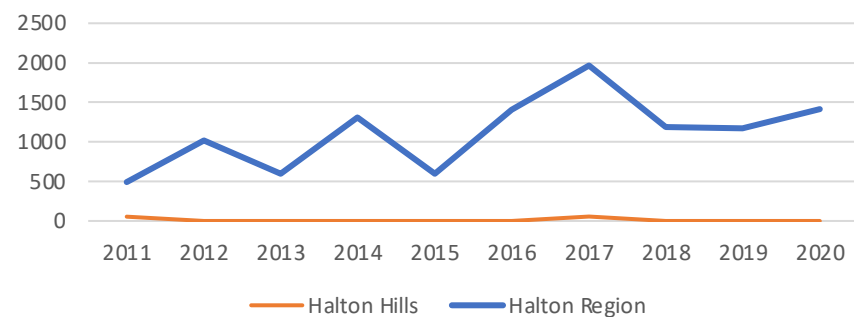
Halton Region - Total Apartment Completions



Halton Hills - Total Apartment Completions



Total Apartment Completions

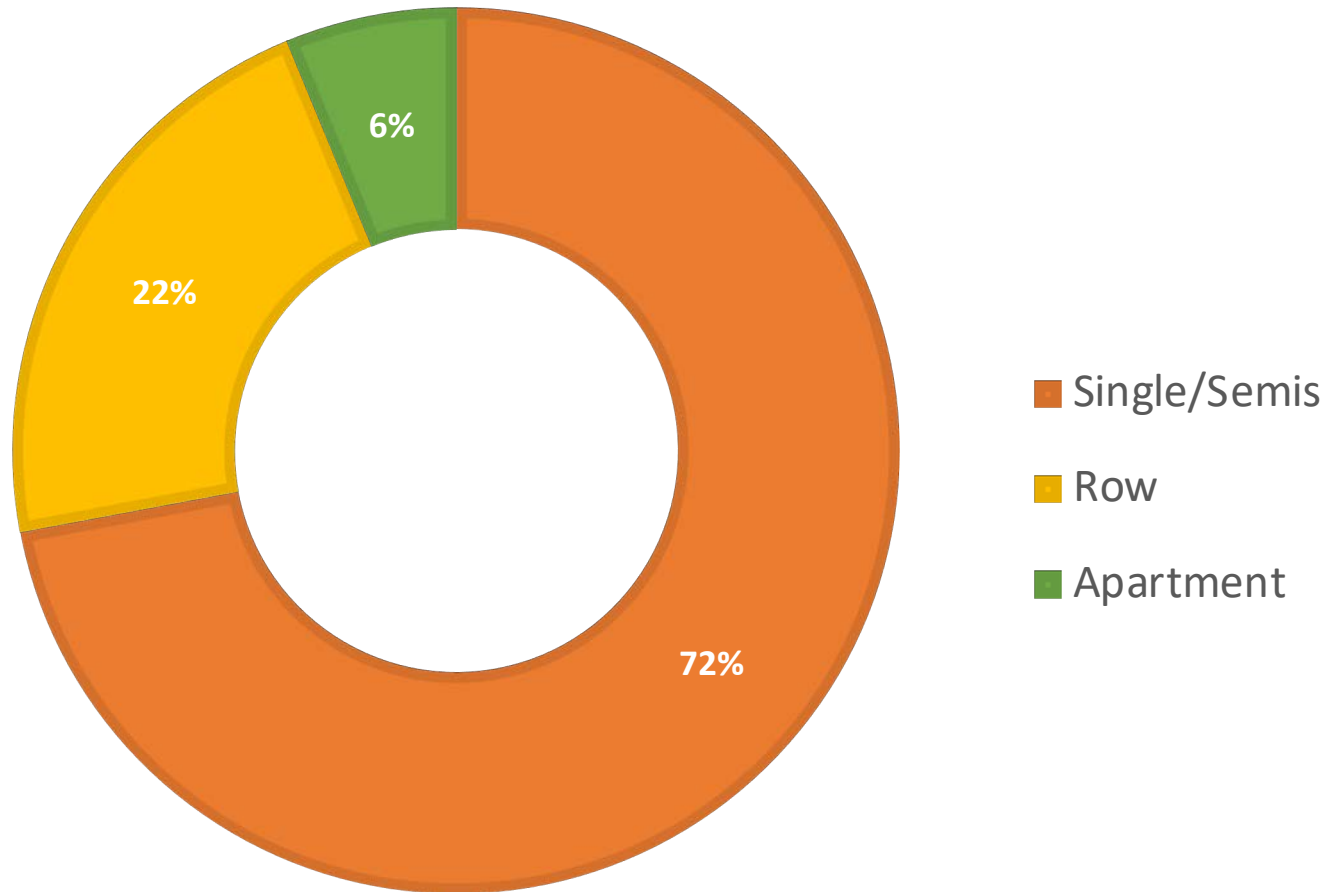


Apartment Completions

- Only 109 units completed since 2011 in Halton Hills (average 11 per year)
- Compared to requirement of 220 to 300 apartment units **per year** - 2021 to 2051



HOUSING COMPLETIONS IN HALTON HILLS BY UNIT TYPE 2011 TO 2019



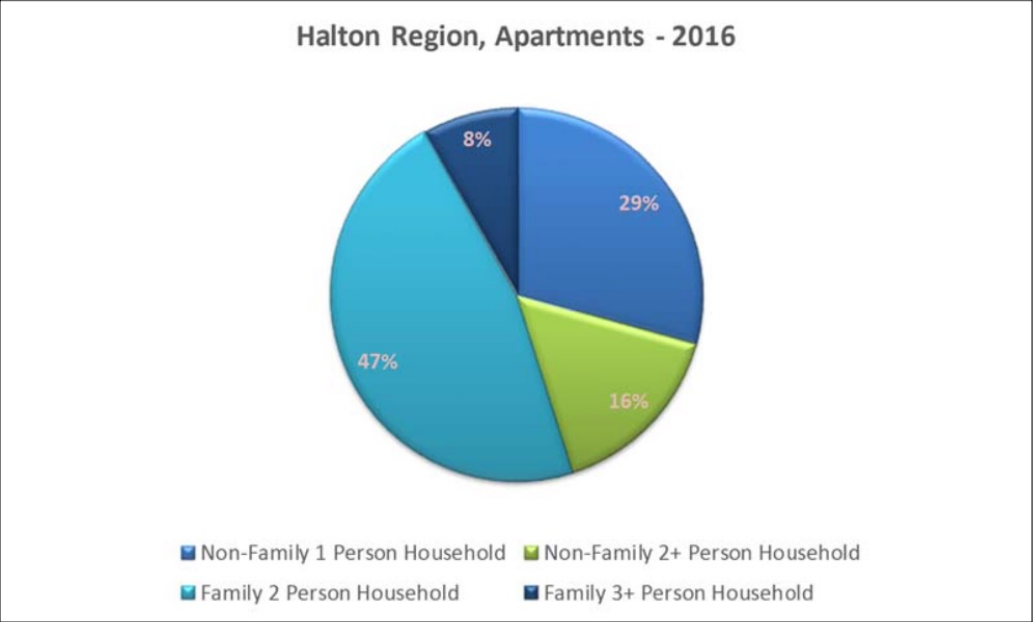
Housing Implications Past Housing Choice

Housing Completions by Unit Type and Area Town of Halton Hills, 2011-2019						
Area	2011-2016		2016-2019 (April)		Under Construction	
	Number of Units	Share by Unit Type	Number of Units	Share by Unit Type	Number of Units	Share by Unit Type
Halton Hills						
Single/Semi	616	69%	557	74%	88	82%
Row	221	25%	140	19%	19	18%
Apartment	53	6%	56	7%	0	0%
Halton Hills Total	890	100%	753	100%	107	100%

Source: CMHC.

- Housing patterns have remained relatively constant for past 20 years
- But with slightly declining apartment share

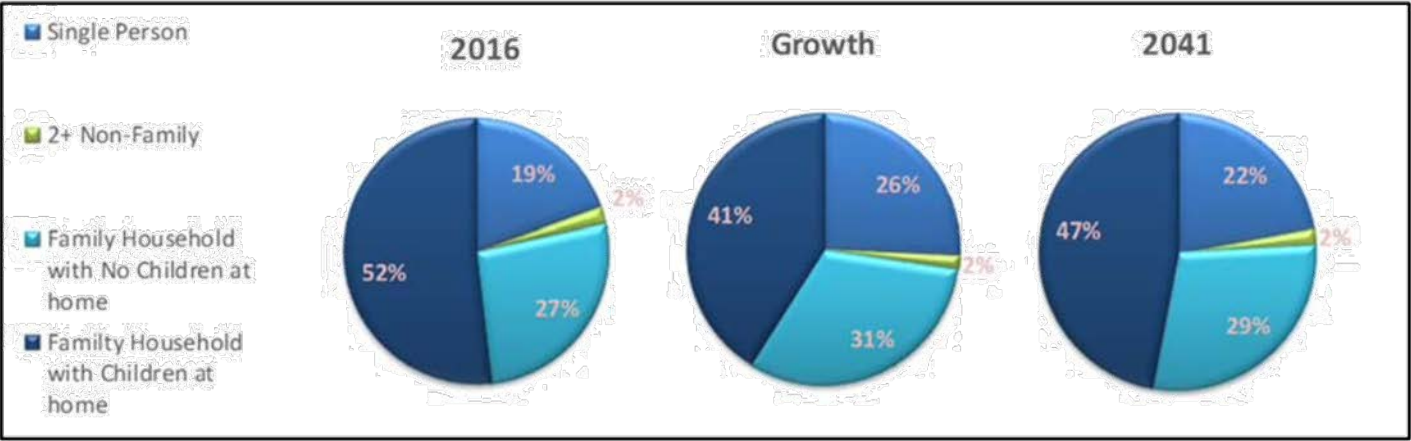
Exhibit 4 Households Occupying Apartments, Halton Region, 2016



Present Intensification Implications – Requires Shift in Housing Market Demand

- Families with children occupy only 8 % of apartments
- 41% of household growth will be in families with children
- Greater portion of families will need to choose to live in apartments

Exhibit 5 Current and Forecast Total Households, Halton Region



Present Intensification Implications

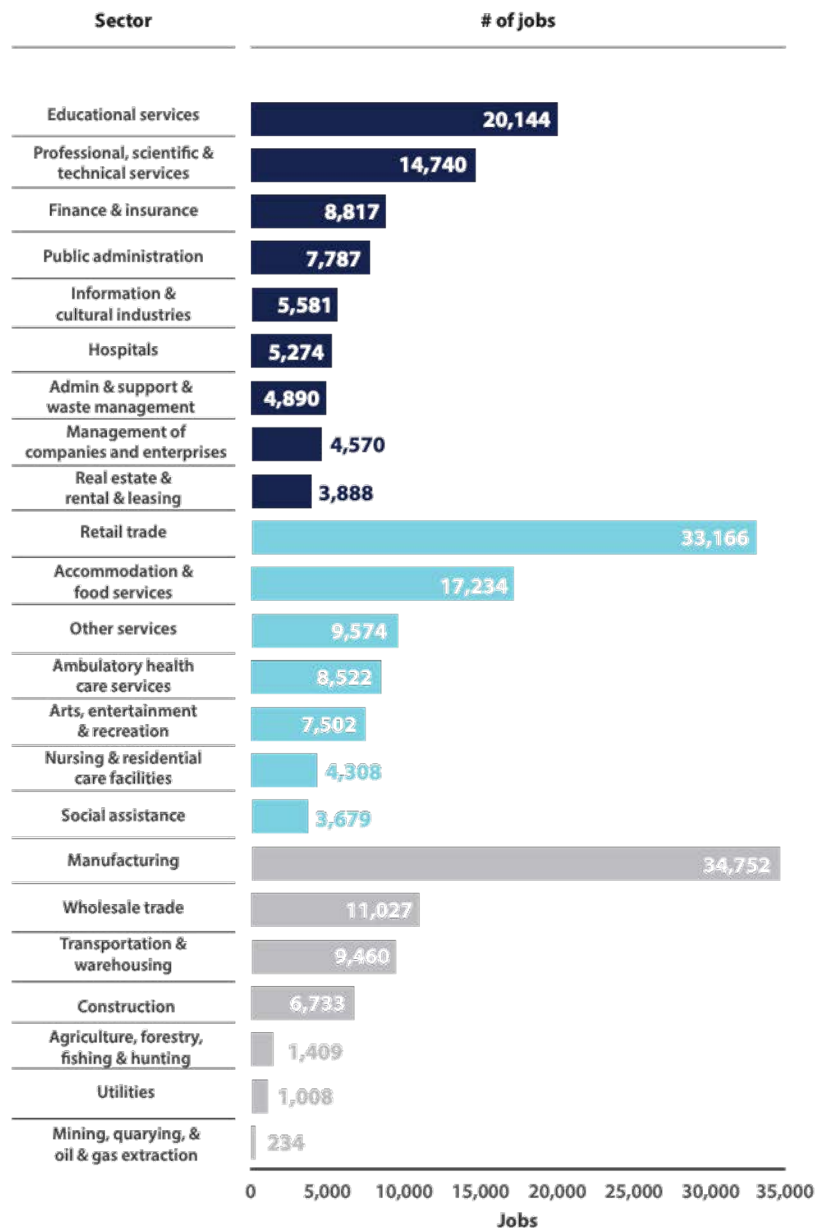
INTENSIFICATION TARGETS		NOTES
Current OP (2015-2031)	5,100 units	
Staff Intensification Supply	5,170 to 7,575 units	Assumes not all sites will redevelop.
Halton IGMS Concepts¹		
<i>Concept 1</i>	6,470 units of which 4,960 apartment	77%
<i>Concept 2</i>	6,500 units of which 5,400 apartment	84%
<i>Concept 3</i>	6,740 units of which 5,610 apartment	83%
<i>Concept 4</i>	6,290 units of which 4,960 apartment	79%

- The IGMS intensification rates will require aggressive redevelopment of sites and changes in housing preferences

1. Hemson Land Needs Assessment and Municipal Allocation, Table 44, February 2021



Employment Implications



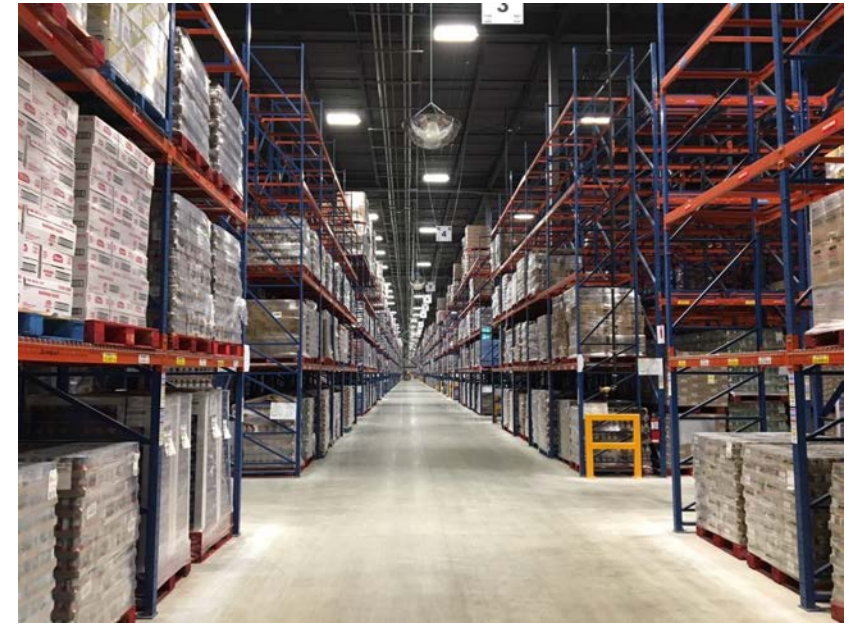
Based on 13,287 businesses

Employment in Halton Hills

- Manufacturing + Retail have been most significant industries
- Employment land demand driven by manufacturing & logistics.
 - North Halton is best suited to accommodate this sector.
- Knowledge-based or “Creative class” economies are also in demand
 - South Halton is best suited to accommodate major office development.

Employment Market

- 2011-2019 period - Halton Region accommodated 1/5th of GTA industrial development
- Employment lands provide opportunity to accommodate export-base employment
 - Can't be accommodated elsewhere in Town
- Advanced manufacturing requires integrated operations on large campus-style settings
 - Increasing need for integrated multi-purpose facilities
 - Combine processing, research, training and warehousing



Employment Market



- Logistics/Goods movement is evolving as e-commerce is growing
 - Need for larger regionally located logistics facilities
 - Requires large tracks of land
 - 401 location is desired
- Foreign Direct Investment Strategy and Economic Development and Tourism Strategy attracting high density employment users
- Limited opportunity to increase intensification of employment lands

Office Market

- 8.7 million sq. ft of major office in Halton – 97% in South Halton along QEW corridor
- Demand for major office has shifted to downtown Toronto over past decade
- Majority of new office space in past decade accommodated in Employment Areas – low and mid-rise office and flex buildings
- Most office demand will continue to be within the Employment Areas through multi-unit and multi-purpose facilities encompassing office and non-office uses
- MTSA's provide opportunities to accommodate some office development but limited
- Mixed-use, transit-supportive areas will likely be increasingly attractive for office space



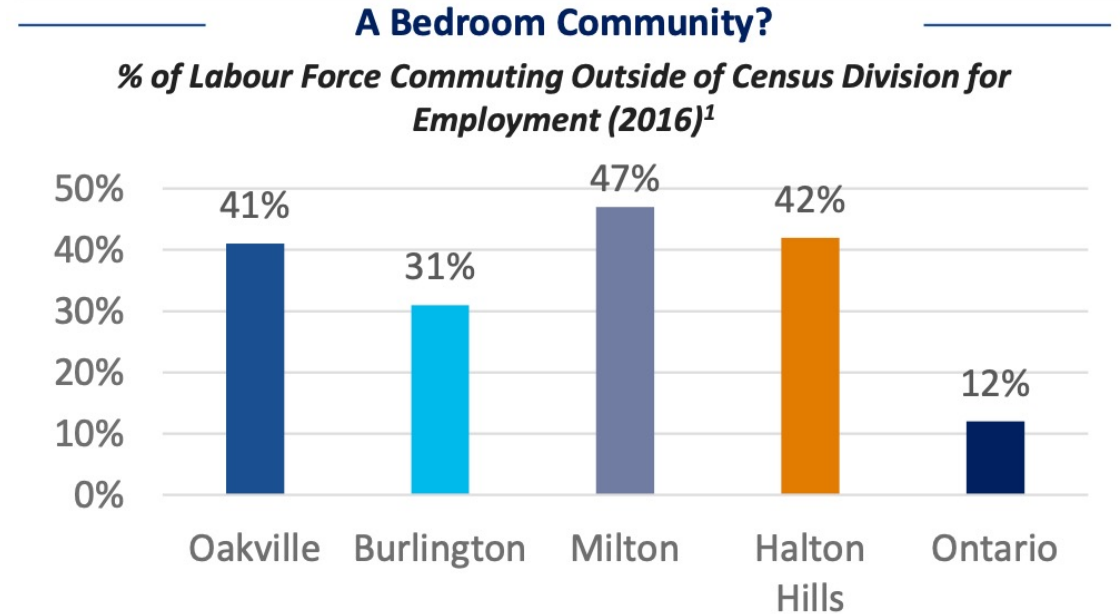
Employment Land Need

- Watson concluded:
- Lack of employment lands to accommodate new investment
 - 376 net ha (929 net acres) designated and vacant (2021)
 - 89% of that is located Premier Gateway Employment Area
 - Only 101 gross ha shovel ready
 - Demand for employment lands over the next 22 years (2019-2041) exceeds the supply.
 - Additional 445 gross ha. (1099 gross acres) required to 2051.
- Compares to IGMS options to 2051:
 - Concept 1: 680 ha (1680 acres)
 - Concept 2: 500 ha (1235 acres)
 - Concept 3: 450 ha (1112 acres)
 - Concept 3b: 0 ha (0 acres)
 - Concept 4: 670 ha (1655 acres)

Present Employment Area Implications of the IGMS Concepts



- 42% of Labour Force in Halton Hills commuting compared to Ontario's 12%
- Increased employment lands provides live work opportunity
- Reduced commuting reduces climate change



Community Facility Implications

- Future community facility needs
 - Community Centres, hospitals, schools, parks etc.
 - Difficulty and cost of finding sites in already developed areas
 - New hospital may need to be located outside current urban boundary



Fiscal Impact Implications

Fiscal Impact Assessment

Growth Scenarios

Growth Scenario 1: (Derived from Halton IGMS Concept 3)

- Residential Intensification Focus
- No Further Greenfield Area Expansion

Growth Scenario 2: (Derived from Halton IGMS Concept 2)

- Residential Intensification Focus
- Limited Greenfield Community Area Expansion in Georgetown
- Employment Area Expansion within Premier Gateway Employment Area

Growth Scenario 3: (Hybrid of Scenarios 1 and 2)

- Residential Intensification Focus, No Community Area Urban Expansion
- Employment Area Expansion consistent with Scenario 2

Fiscal Impact Assessment

- Fiscal impacts of growth scenarios measured against current tax rates and state of good repair of existing assets (SOGR) funding needs
 - Funding the estimated current SOGR with no further development would increase current tax rates by 29%
 - Forecast development would place downward pressure on required tax increases to meet current SOGR funding needs

Scenario	RT Tax Rate	Tax Rate Impact (2021)
2021 (Current Capital Funding)	0.3643%	
2021 (No Growth & State of Good Repair of Existing Assets)	↑ 0.4688%	29%
Scenario 1 <i>No Residential Greenfield Expansion</i> <i>No Employment Area Expansion</i>	↑ 0.4545%	25%
Scenario 2 <i>Limited Residential Greenfield Expansion</i> <i>Expansion to Future strategic Employment Areas</i>	↑ 0.3757%	4%
Scenario 3 <i>No Residential Greenfield Expansion</i> <i>Expansion to Future strategic Employment Areas</i>	↓ 0.3437%	-6%

Implications of Delay in Settlement Expansion

- IGMS is to 2051 so growth decisions will be locked in until 2051
- Regional Best Planning Estimates (BPEs), Regional Transportation Master Plan (TMP), Infrastructure Planning and Development Charges need to be updated
 - All based on the 2051 planning forecasts and where growth is to be allocated
- Can't reverse those decisions in 2031
- Lack of land will have implications on housing affordability for families
- Lack of shovel ready land will be dis-incentive for industries to locate in Halton Hills
- Lack of new employment land will result in increased out-commuting with increasing impact on climate change

Key Takeaways

Key Takeaways

Housing

- Housing in Halton Hills has predominantly been family oriented
- Apartment Growth in Halton Hills has been very limited in last 10 years – average 11 per year
- Greater apartment demand will require a significant shift in housing preferences of families
- Cost per square foot does not favour apartments over ground related housing.
- Past rates of intensification have largely ground related – future predominantly apartments
- Supply of intensification sites does not lead to intensification happening
 - Many factors need to align – supply side and market
- Densification increases apartment absorption to 220 to 300 per year
- Densification of DGA will be a challenge as limited land availability
- New communities can be designed as 15 minute neighbourhoods to reduce the impacts on climate change

Key Takeaways

Employment

- Strong demand for lands for manufacturing, logistics, hospitality and recreational facilities
- Don't have supply to meet demand – shovel ready sites are limited
- 401 location is desirable
- Limited opportunities to intensify existing employment lands
- Some limited office opportunities in the MTSA
- Most office demand in Halton Hills in multi-unit and multi-purpose buildings in employment areas.
- Both Watson and Hemson have identified a need for additional employment lands by 2041 and 2051.

Community Facilities

- Difficulty finding sites for large community facilities in already developed areas.
- New Town wide park needed by 2031 and additional parks post 2031

Key Takeaways

Fiscal Impact

- Increased tax rates required over the period to 2051 to maintain a state of good repair of existing assets
- Future growth within current residential and employment boundaries (i.e. scenario 1) has a minimal effect on mitigating tax increases
- Expanding residential and employment boundaries in scenarios 2 and 3 provide fiscal benefits that offset all or most of the tax increases required to maintain a state of good repair of existing assets
 - Positive fiscal impacts in scenarios 2 and 3 are driven by expansions to employment areas and the associated assessment growth with increased employment

Final Thoughts

- Waiting 10 years until next MCR is not a prudent strategy
- Growth decisions will be locked in until 2051
- Lack of land will have implications on housing, industries and climate change due to increased out commuting

Next Steps

Next Steps

- 1) Preferred Concept will come to Regional Council for decision this October.
- 2) The draft ROPA will come to Regional Council for approval in February 2022.

Thank You

