

Memo

Date: 2021-06-04

To: Duran Wedderburn,
Principal Planner, Region of
Peel

From: Paul Kulig (Perkins&Will),
Sean Hertel (Sean Hertel +
Associates Urban Planning),
Craig Ferguson (Urban
Metrics) and Ashita Parekh
(Perkins&Will)

Re: Update to Peel Region
Intensification Analysis
Memo (July 2020)

Update to Peel Region Intensification Analysis Memo (July 2020) – DRAFT

This update to the Intensification Analysis Memo (July 2020) is prepared to update and validate the findings from our previously-completed work. The addendum confirms that the findings from the July 2020 report are still applicable and relevant to support Peel Region's ongoing Official Plan review process; it confirms that there are many opportunities to achieve the required intensification and related density requirements under in-force Provincial planning policy. This addendum provides an overview of the most recent policy requirements and a review of new intensification in the Region; it includes an assessment of the capacity of new and emerging Strategic Growth Areas based on the Region's growth scenario; impacts to market conditions based on the new 2051 horizon; and final recommendations stemming from this addendum and the original July 2020 analysis.

1. Executive Summary

The findings and the recommendations of our July 2020 Intensification Analysis Memo, based on the policies and 2041 planning horizon of the 2017 Growth Plan, are still applicable and relevant for informing Peel Region's ongoing Official Plan Review process which is now focused on a planning horizon to 2051. The additional population and employment growth, and related policy requirements including minimum density targets, assigned to Peel Region are still achievable. Accordingly, this Addendum confirms the findings of our original Memo, and includes additional information and analyses arising from the Province's approval of an updated Growth Plan and the Region's ongoing growth management work program (see Table 1).

The Region has sufficient opportunities to achieve its allocated growth to 2051. Strategic decisions will need to be made, in meeting and/or exceeding the Growth Plan intensification targets, about where to prioritize that additional growth. There are a significant number of Strategic Growth Areas including future Major Transit Station Areas (e.g. Clarkson GO Station, Mississauga) within the Region's built boundary, having the potential to absorb a significant proportion of population and employment growth to 2051. There are also significant opportunities to meet that assigned growth through Designated Greenfield Areas, including Heritage Heights in Brampton and Mayfield West in Caledon. These areas, which include Strategic Growth Areas with variety of housing forms and a mix of uses, will play an important role in meeting the market demand for ground-related housing forms (e.g. single- and semi-detached) that will be created by adding an additional 300,000 residents to 2051.

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Given that there are many different markets for residential and employment growth, it is reasonable to expect that growth within and outside of the Region's built boundary will each contribute significantly to meeting the 2051 targets.

Mississauga will continue to intensify and its supply of housing types and mix of uses will continue to diversify, especially at Major Transit Station Areas. Brampton's vision for compact mixed-use rapid transit corridors will continue to be advanced and realized, in addition to opportunities for "gentle density" in existing neighbourhoods. Caledon will experience significant population and employment growth through urban expansion while creating opportunities for focused mixed-use intensification in existing and emerging centres.

2. Overview of Current Provincial Policy

The Province on June 16, 2020 released proposed changes to the Growth Plan (2019), the most significant of which:

- Extend the planning horizon from 2041 to 2051;
- Assign to Peel Region an additional 310,000 people and 100,000 jobs, for an ultimate 2051 population of 2.28 million and 1.07 million employees;
- Maintain the 2031 minimum intensification target of 50 per cent through 2051;
- Define and introduce protections for Provincially Significant Employment Lands; and
- Introduce an updated Land Needs Assessment Methodology.

Given the timing of these changes, which came into law in August 2020, the original Intensification Analysis Memo (July 2020) acknowledged but did not provide detailed analyses on the extent to which the new requirements may impact Peel Region's in-progress Growth Plan conformity exercise.

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Table 1: Comparison of In-Force Peel Official Plan and Growth Plan Requirements

	Peel Official Plan	Growth Plan, 2017 (Included in July 2020 Intensification Analysis Memo)	Growth Plan, 2019 (Included in May 2021 Intensification Analysis Memo Addendum)
Population Forecast	1,490,000 (2031)	1.97 Million (2041)	2.28 Million (2051)
Employment Forecast	870,000 (2031)	970,000 (2041)	1,070,000 (2051)
Minimum Intensification Target	40% to 2025 50% to 2031	50% to 2031 60% to 2041	50%
Minimum Designated Greenfield Area (DGA) Target	50 ppl/jobs per ha (including employment areas)	80 ppl/jobs for new DGA	50 ppl/jobs per ha
Urban Growth Centre Target	200- Brampton 200- Mississauga	200- Brampton 200- Mississauga	200- Brampton 200- Mississauga
Major Transit Station Areas	-No Requirements	-Delineate Boundaries -Minimum transit supportive densities -Alternative densities	-Delineate Boundaries -Minimum transit supportive densities -Alternative densities
Strategic Growth Areas	-No Requirements	- Identify and delineate boundaries -Establish minimum densities	- Identify and delineate boundaries -Establish minimum densities
Employment Areas	-Conversion protection policies	-Delineate Employment Areas -Conversion protection policies	-Delineate Employment Areas -Conversion protection policies -Provincially Significant Employment Areas
Land Needs Assessment Methodology	-No requirement	-Methodology issued	-Methodology updated

Source: Adapted from Region of Peel Growth Management Focus Areas – Policy Directions Report, May 2020

This latest (August 2020) in-force version of the Growth Plan has impacted the Peel 2041 Official Plan Review mid-stream; it added 10 years, 310,000 residents and 100,000 employees to the planning horizon. Impacts include the allocation of new growth to the local municipalities, additional lands needed through Settlement Area Boundary Expansion, and the assessment of infrastructure capacity to accommodate the forecasted growth. While this is a significant change to consider and implement, the Region and its area municipalities are well-positioned to accommodate this additional growth allocation.

There are many opportunities for additional growth within the built boundary, especially within the numerous designated Strategic Growth Areas, towards achieving the minimum 50 per cent intensification target. The Region is currently (2020) achieving a rate of 44% per cent. This will be complemented by planned growth within the Designated Greenfield Areas, which are being planned to exceed the minimum density

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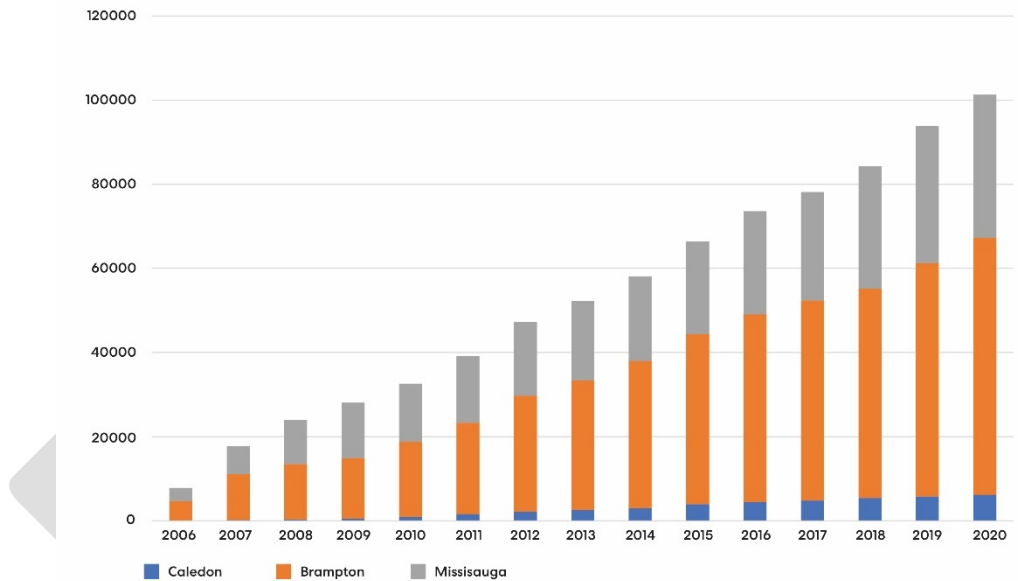
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target of 50 people and people per hectare. Overall, a spectrum of housing market demands will be met across the Region over the next 30 years, which also includes higher-density housing opportunities (i.e. Strategic Growth Areas) within the new communities. Providing infrastructure and services to support this tandem growth strategy will be critical, which should be supported and guided by a robust continuous growth monitoring program to identify and close potential gaps.

3. New Intensification

In analysing building permit data from the years 2016-2020 it is observed that Brampton accounted for a larger share of development during 2019-2020 with most of that growth being in single-detached units. Similarly, in Mississauga, single-detached units accounted for a relatively larger share of construction activity in comparison to the previous decade. The short timeframe for analysis, however, makes it unclear if this growth is an impact of COVID-19 or a broader market trend. Below are some graphs and charts to complement these observations:

Cumulative New Unit Growth (2006-2020):

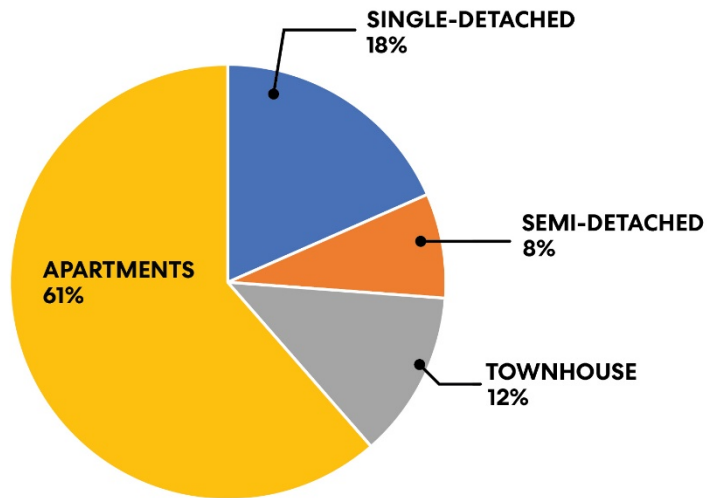
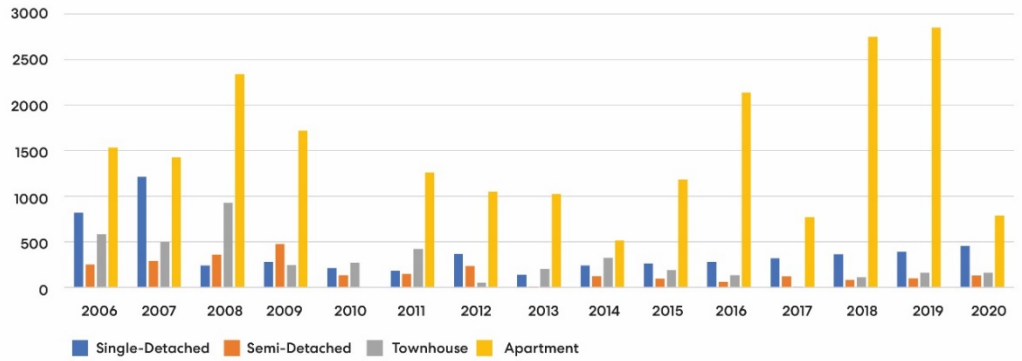


As per the above graph the Region has seen steady rate of new unit growth across all three local municipalities from 2006-2020.

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Mississauga New Units by Typology (2006-2020):

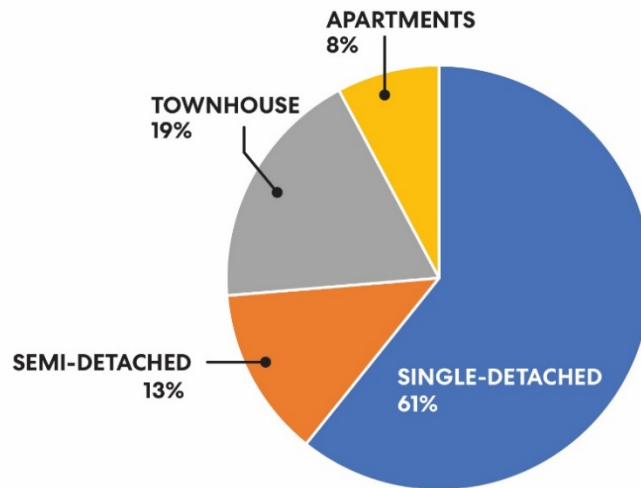
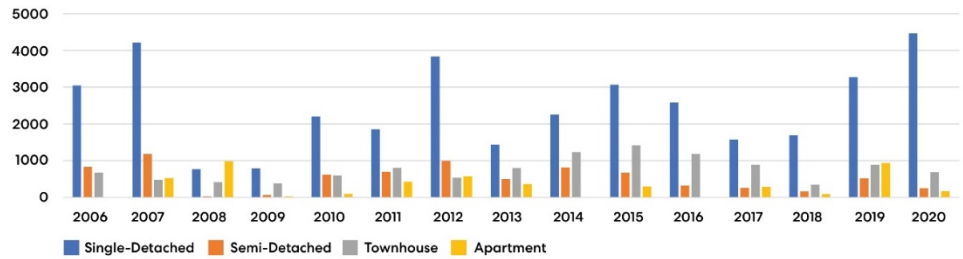


The City of Mississauga experienced consistent unit growth in 2006-2019; 2020 being the exception, with over 61% of new unit delivery in form of apartments.

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Brampton New Units by Typology (2006-2020):

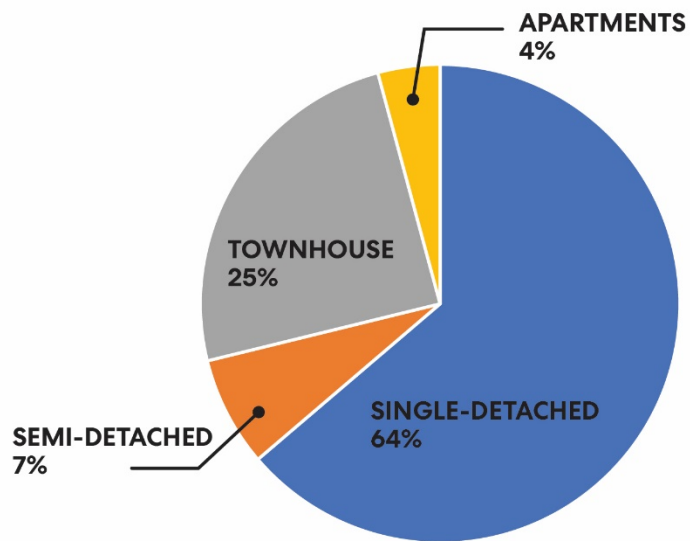
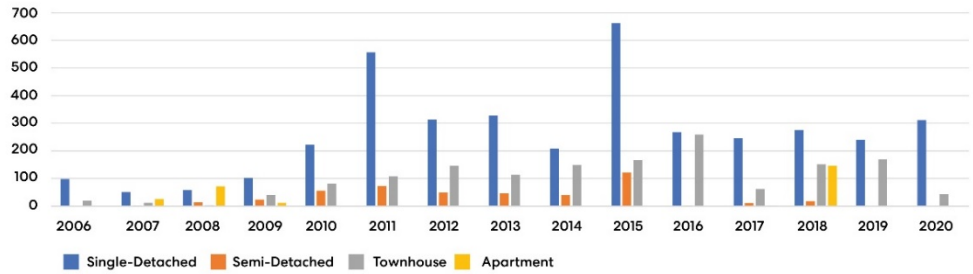


The City of Brampton experienced peak new unit growth in the year 2020. New unit growth in Brampton in 2006-2020 was primarily low density; over 60% of new unit delivery in Brampton was in the form of single detached houses.

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Caledon New Units by Typology (2006-2020):

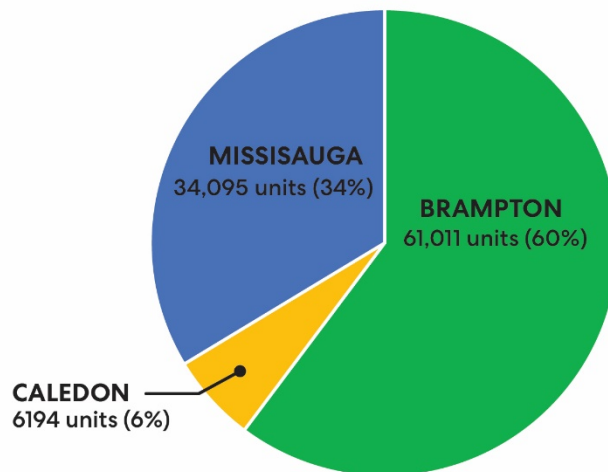
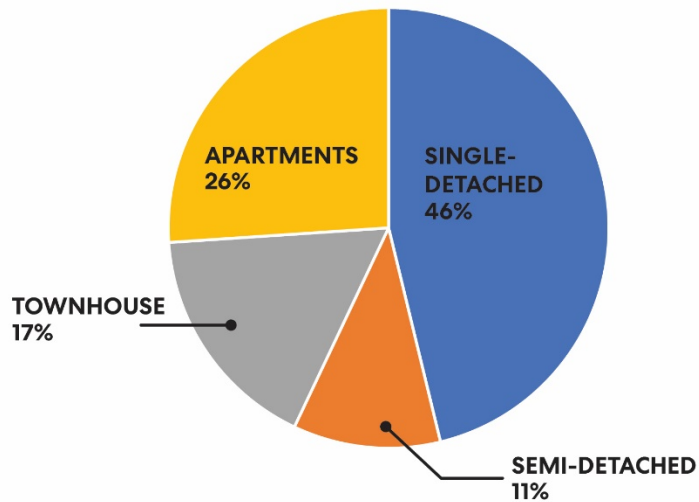


The Town of Caledon has experienced steady increase in growth since 2011. Over 64% of new unit delivery in Caledon was in the form of single detached houses.

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Peel Region New Units by Typology (2006-2020):



Peel Region's new unit growth in 2006-2020 occurred primarily in Brampton with over 61,000 units. 46% of the growth in Peel Region was in the form of single-detached housing. This suggests that the majority of Peel Region's built form is occurring through low density growth.

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4. New and Emerging SGAs

In consideration of the many options available to Peel Region and its area municipalities to accommodate their respective growth allocations to 2051, and to meet the minimum density targets, it is important to confirm the definition and function of Strategic Growth Areas. As defined by the in-force (August 2020) Growth Plan, these areas are:

“Within settlement areas, nodes, corridors, and other areas that have been identified by municipalities or the Province to be the focus for accommodating intensification and higher-density mixed uses in a more compact built form.

Strategic growth areas include urban growth centres, major transit station areas, and other major opportunities that may include infill, redevelopment, brownfield sites, the expansion or conversion of existing buildings, or greyfields. Lands along major roads, arterials, or other areas with existing or planned frequent transit service or higher order transit corridors may also be identified as strategic growth areas.”

While compact development, meeting and possibly exceeding the minimum requirements, is being planned for the Designated Growth Areas this growth is not considered to be “intensification”. Strategic Growth Areas, such as MTSAs, outside of the built boundary will still provide important opportunities for a range of higher-density and mixed-use development at transit-supportive densities.

5. Market Conditions

Since the Region of Peel Intensification Analysis was prepared, the COVID-19 pandemic has continued to impact housing market trends. In the GGH, housing affordability has continued to deteriorate. While work from home arrangements have provided some people with the flexibility to live further away from city-centres, where many jobs are concentrated, in search of larger homes and more space. These trends could present some constraints for Peel Region in achieving anticipated rates of intensification over the short-term.

However, the purpose of this memorandum is to provide insights into the opportunities and constraints associated with accommodating intensification between the 2041-2051 period. Over the long-term, which includes the 2041-2051 period, it is likely that many of the impacts of the COVID-19 pandemic will be in the rear-view mirror and long-term demographic trends will continue to influence housing choice. The long-term trends that are likely to present opportunities for the Region to achieve its intensification target include strong migration and an aging demographic. Also, during the 2041-2051 period there will be fewer opportunities to develop greenfield and whitebelt lands in Peel Region, which will likely result in a larger

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concentration of development occurring within the built-up area, including in the SGAs, as these locations will have the transit infrastructure and community amenities to accommodate growth.

As illustrated in the Region of Peel Intensification Analysis, many of the SGAs, particularly the MTSAs, were not anticipated to meet their density targets by 2041. Based on forecasts provided by Peel Region for the 2041 to 2051 period, growth will be distributed across the SGAs.

- The UGCs in Mississauga and Brampton will continue to be an important destination for population and employment growth with the build-out of Square One and investments being made by the City of Brampton in the Downtown.
- Among the MTSAs, station areas along the Hurontario LTR, Dundas BRT and Queen BRT are also expected to play a larger role in accommodating population and employment growth during the 2041 to 2051 period, as there is anticipated to be transit infrastructure in place to support these new persons and jobs.
- Other Strategic Growth Areas, such as Uptown Brampton, Downtown Brampton and Bramalea, are also expected to play an outsized role in accommodating growth in the latter half of the forecast horizon. Based on the capacity available in the SGAs to accommodate growth, it is reasonable to assume that they can accommodate the forecast intensification during the 2041 to 2051 period.

6. Key Findings and Final Recommendations

The findings and recommendations of our original (July 2020) Intensification Analysis Memo, beginning in Section 4.2, are still applicable. The addition by the in-force (August 2020) Growth Plan of 10 years, 310,000 people and 100,000 jobs to Peel Region's planning horizon will still allow for the achievement of the required density targets. In consideration of the changes to Provincial policy and the emerging directions of Peel Region's Official Plan process over the past year, it is especially important to carefully consider that:

- Achieving the target densities for some Strategic Growth Areas, including some Major Transit Station Areas, will likely occur beyond 2051;
- Planning for growth in Designated Greenfield Areas (e.g. Heritage Heights, Brampton), especially at densities greater than 50 people and jobs per hectare, may have some impact on the magnitude and timing of intensification within the built boundary and especially Strategic Growth Areas;
- Infrastructure investments to support both intensification and greenfield development, as currently being considered in the on-going Official Plan Review process, will have significant financial and growth management impacts to and likely beyond 2051;
- There are sufficient opportunities to accommodate intensification within delineated built-up areas in Peel Region to meet minimum intensification target, as the Region plans to accommodate its 2051 population and employment targets, being 2.28-million people and 1.07-million jobs respectively;
- The allocation and prioritization of growth to areas within and outside the built boundary is a strategic decision, with a range of inter-connected implications, that must be made by Peel Region and its area municipalities; and
- A robust and continuous monitoring program should be put in place by the Region, to assess current and emerging development trends including the mix and density of housing types. Such a program will further support the proactive planning by the Region and the area municipalities, including making important decisions regarding the prioritization of infrastructure and service delivery.