



Our Plan Toronto: Land Needs Assessment

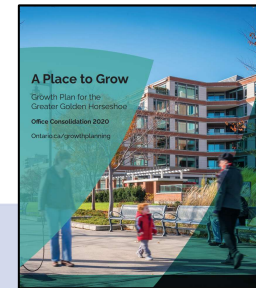
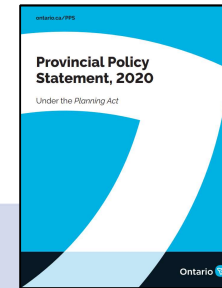
Planning and Housing Committee
July 5, 2022

Planning Research and Analytics
City Planning Division

Land Needs Assessment

What is a LNA?

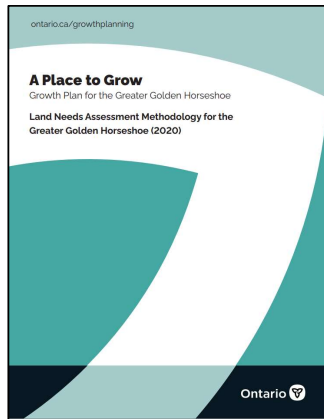
- Required by the Growth Plan as part of an MCR
- Determine the total quantity of land needed to accommodate forecasted growth to the Growth Plan horizon
- Includes the need for any settlement area boundary expansions, employment land conversions, and the quantity of any excess lands
- Toronto is bounded and cannot expand, so all growth is intensification



Why is it important to Toronto?

- Background information to the MCR, and provides context for the Employment Policies and for Strategic Growth Areas such as MTSAs
- Long-range projections are needed for land use planning, transportation planning and infrastructure needs
- Provides context for Secondary Plans, the EHON Initiatives and other policies

LNA Methodology



Common Features

- **Time Frame** – the Growth Plan forecast horizon – 35 years to 2051
- **Alternative Growth Scenarios** – Growth Plan forecasts are minimums
- **Community Areas**
Housing, population-related jobs, most office jobs, some employment land jobs
- **Employment Areas**
Employment Land Employment i.e. employment in industrial type buildings

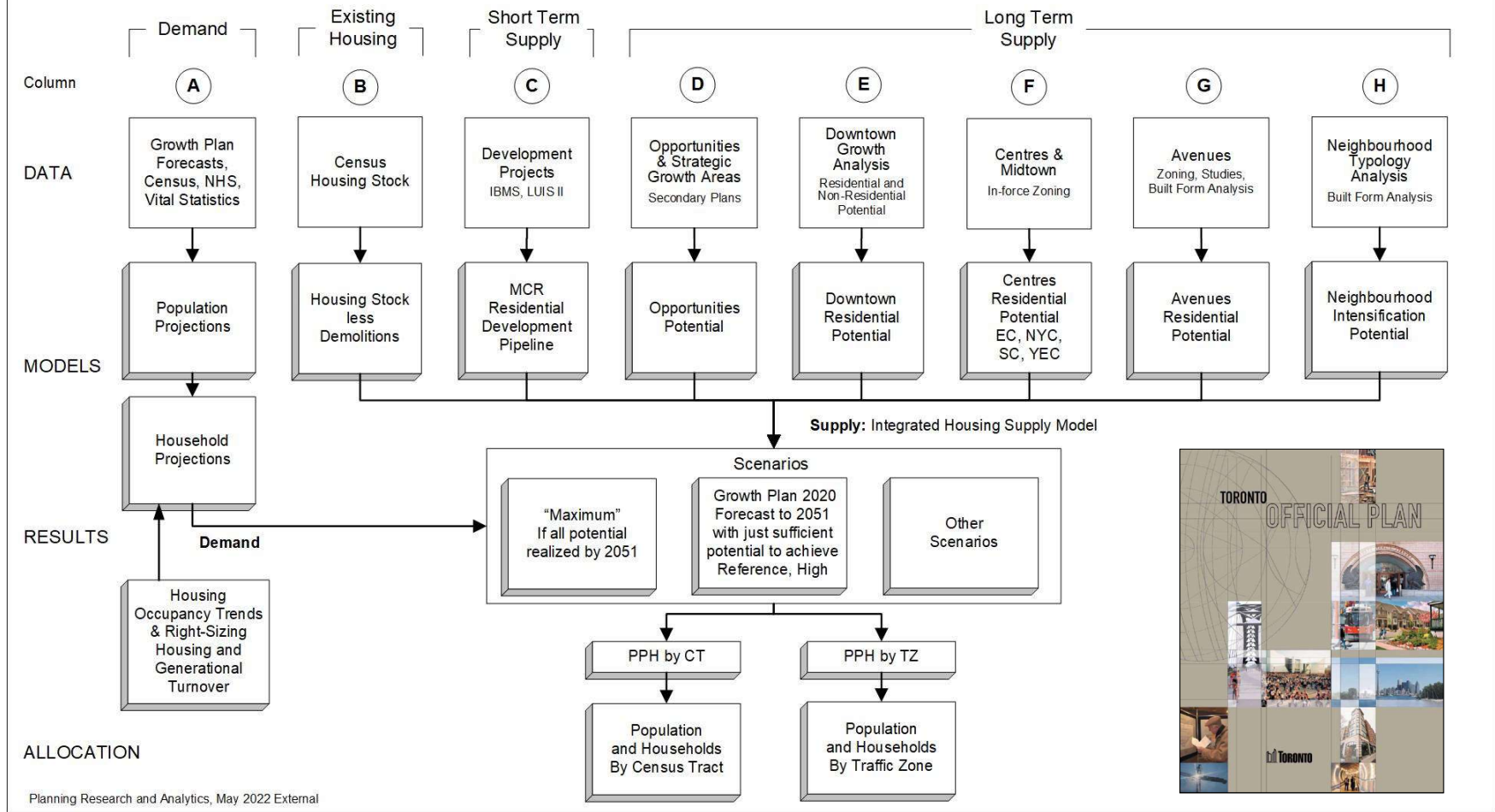
Community Land Area Needs

- Population Forecasts
- Housing Need
- Housing Supply Potential

Employment Land Area Needs

- Employment Forecasts
- Employment Allocation
- Employment Area Potential

Land Needs Assessment Methodology: Community Area Land Needs Assessment



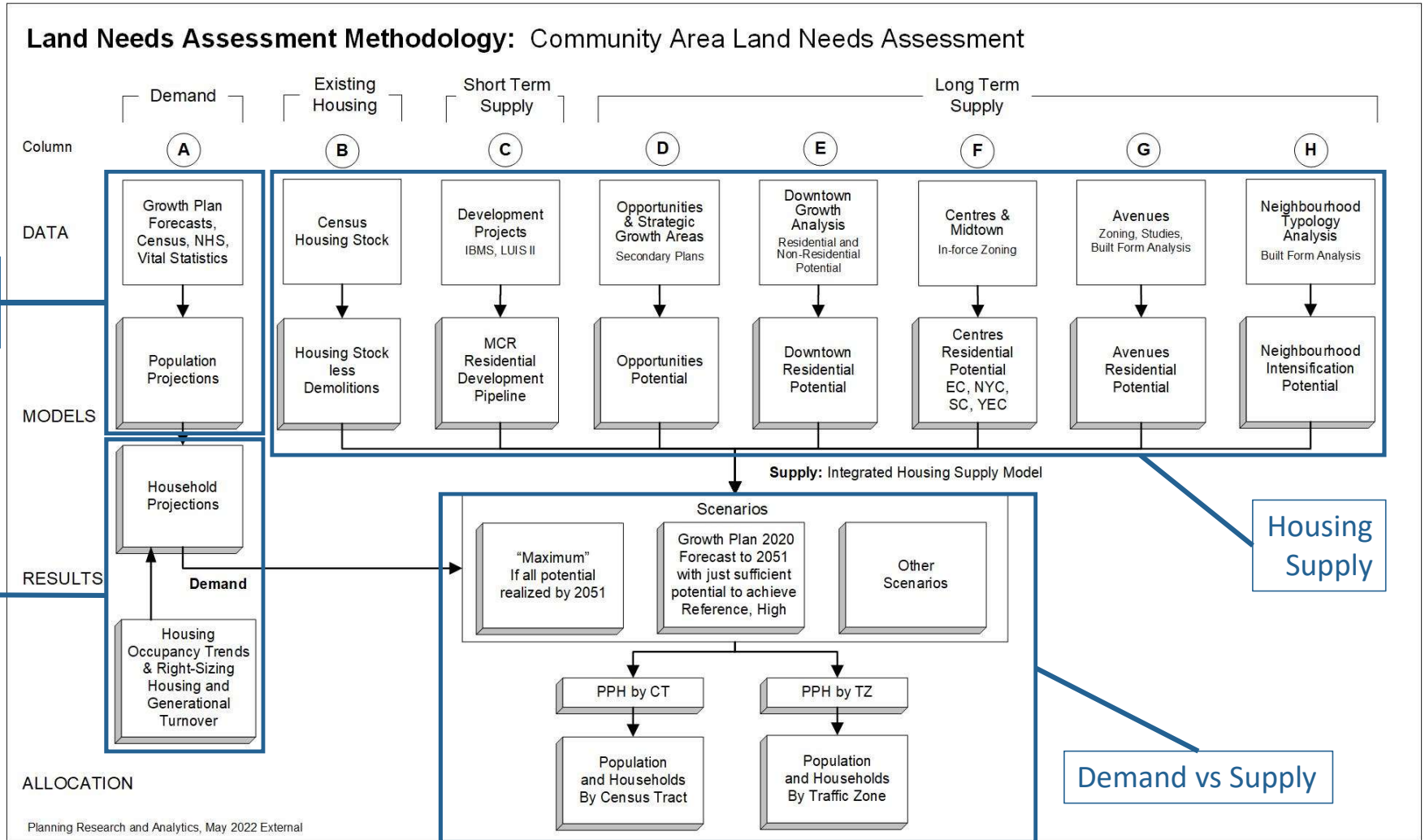
Land Needs Assessment Methodology: Community Area Land Needs Assessment

Population Forecasts

Housing Need

Housing Supply

Demand vs Supply



Population and Household Projections

Population Projections

- Cohort – Component Model

Household Projections

- Housing Demand Model
- Market-based demand for housing based on demographic trends

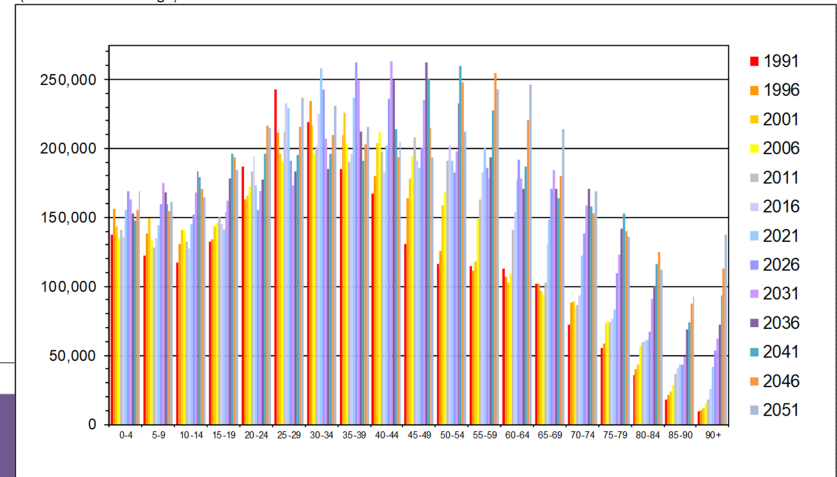
Integrated Housing Supply

- Combined sources of supply
- Persons per household rates

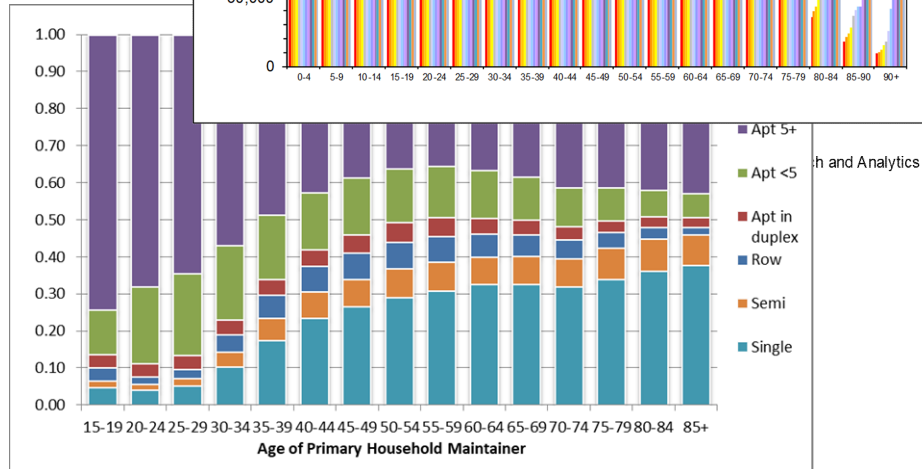
Scenarios

- Hemson 2020 Reference
- Hemson 2020 High
- Ministry of Finance 2021
- Maximum, if total potential were realized

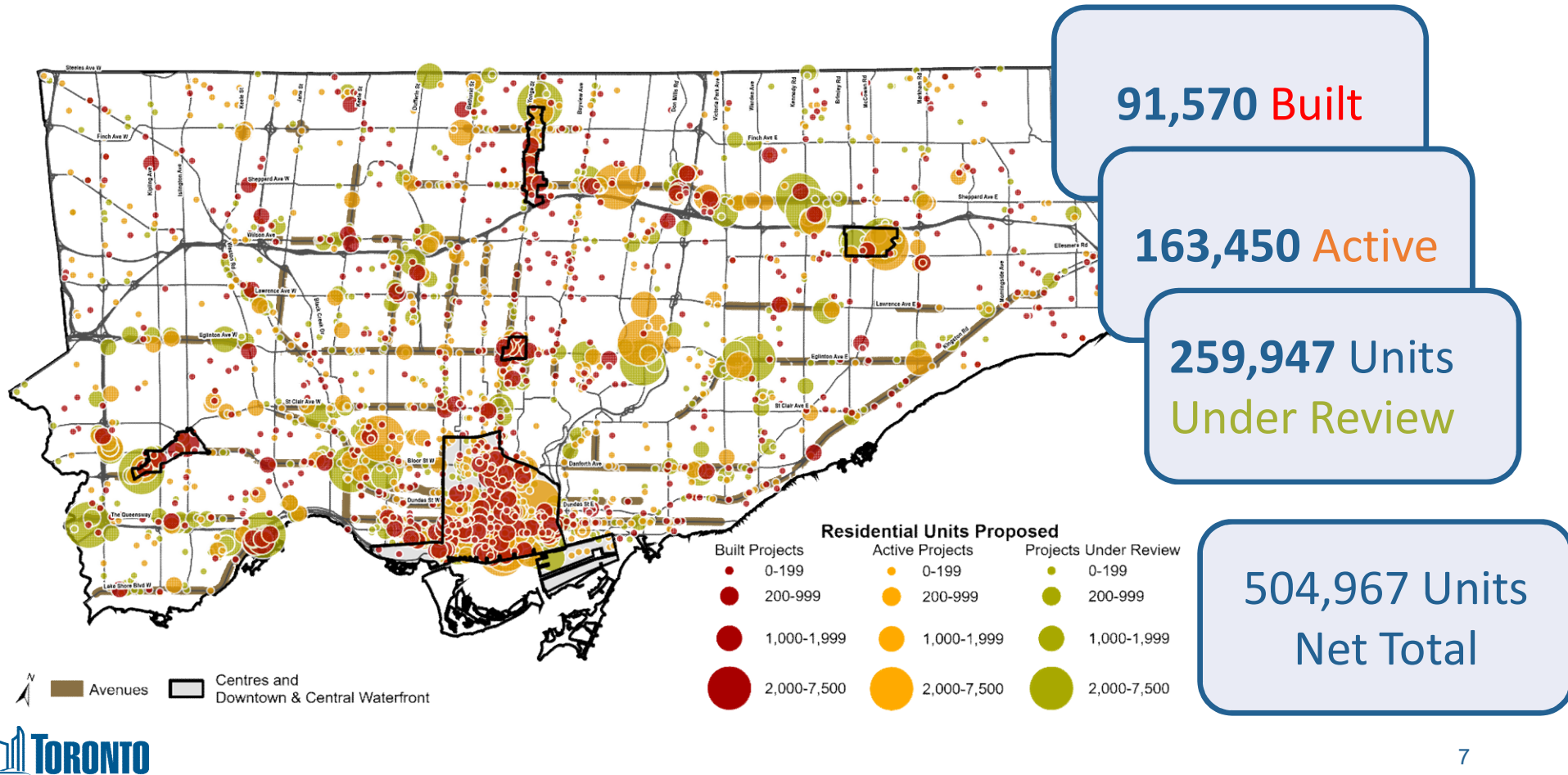
Toronto Projected Population
(without undercoverage)



2016 Headship

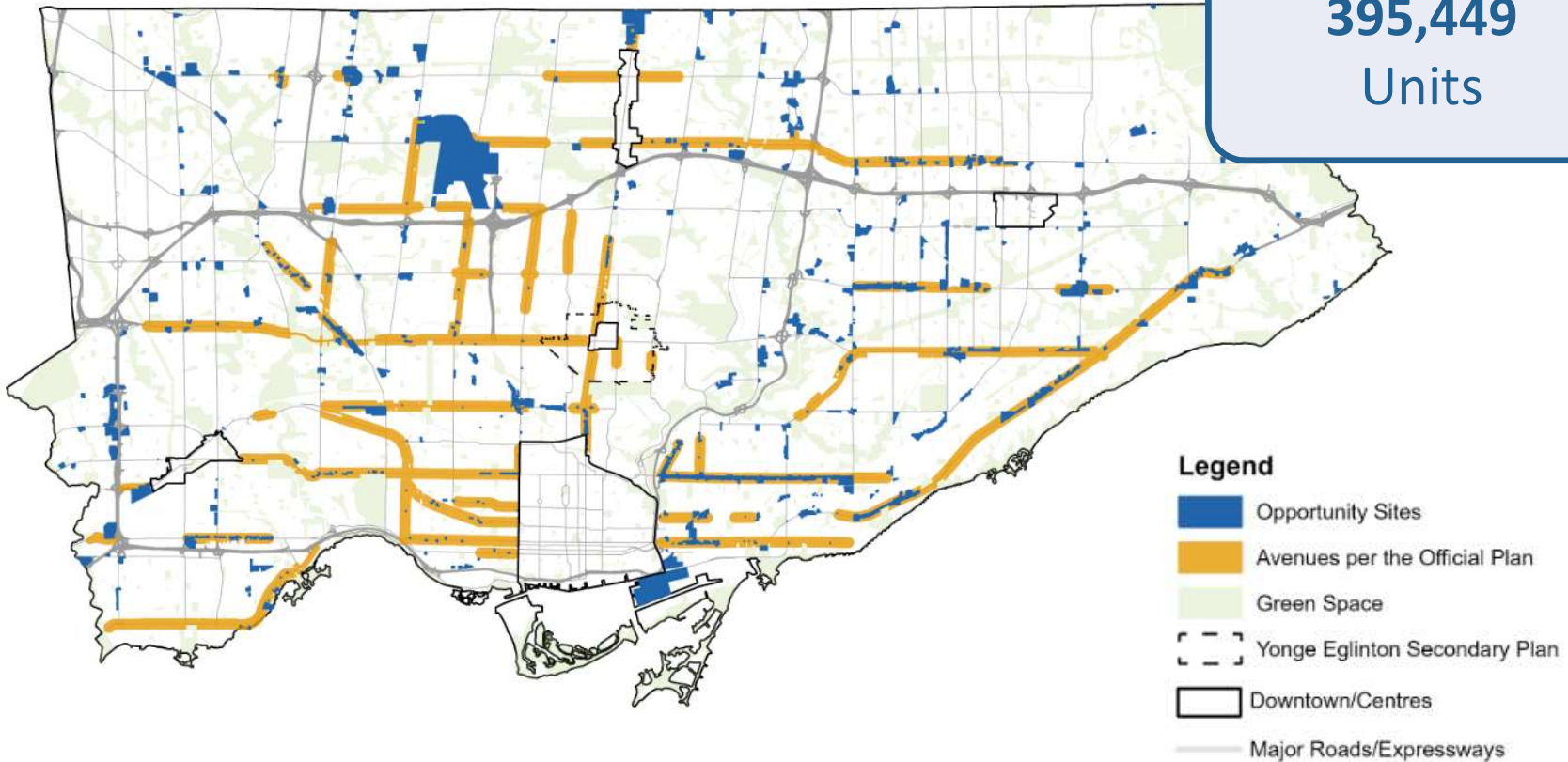


Development Pipeline

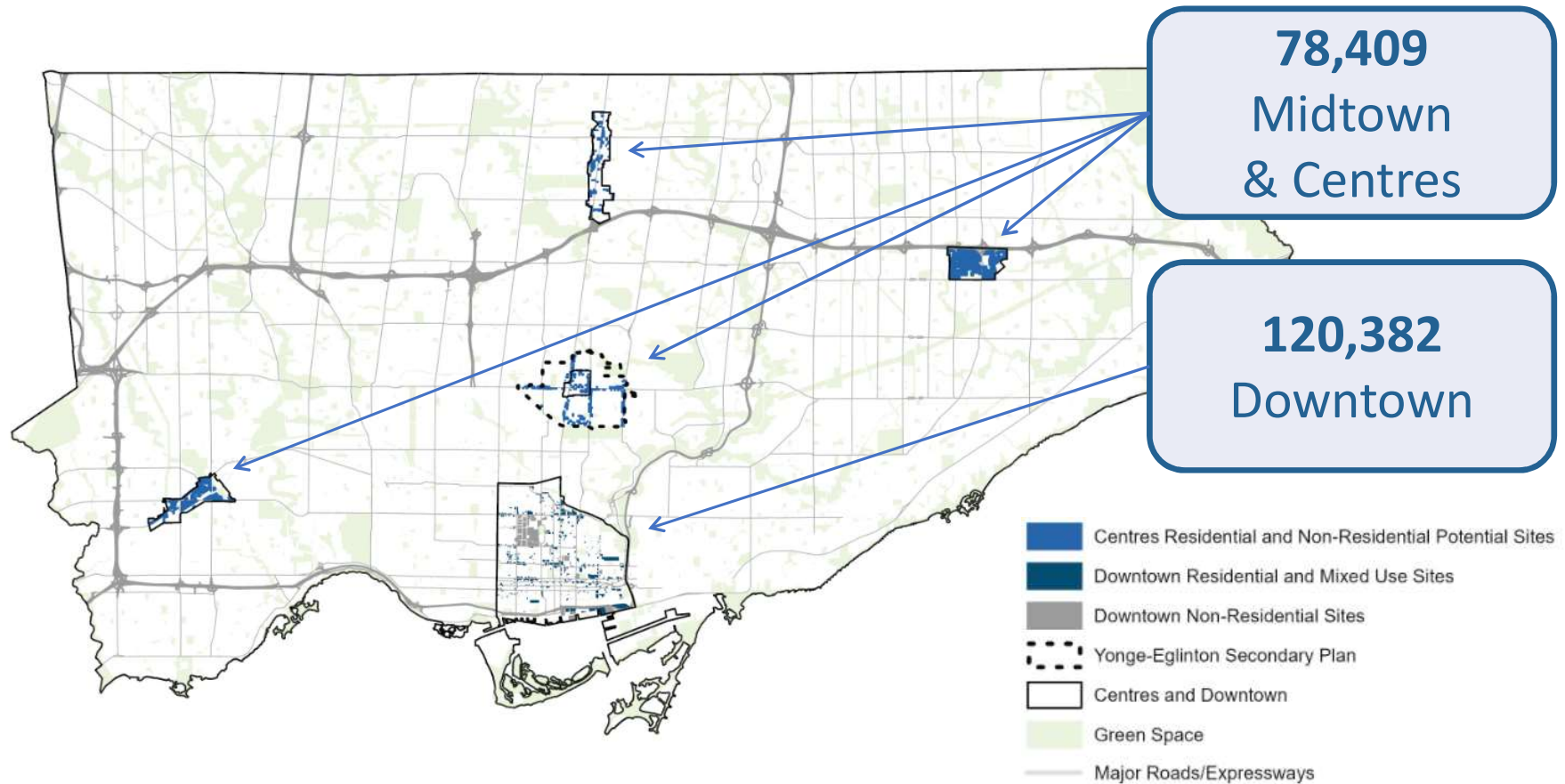


Major Redevelopment Opportunities

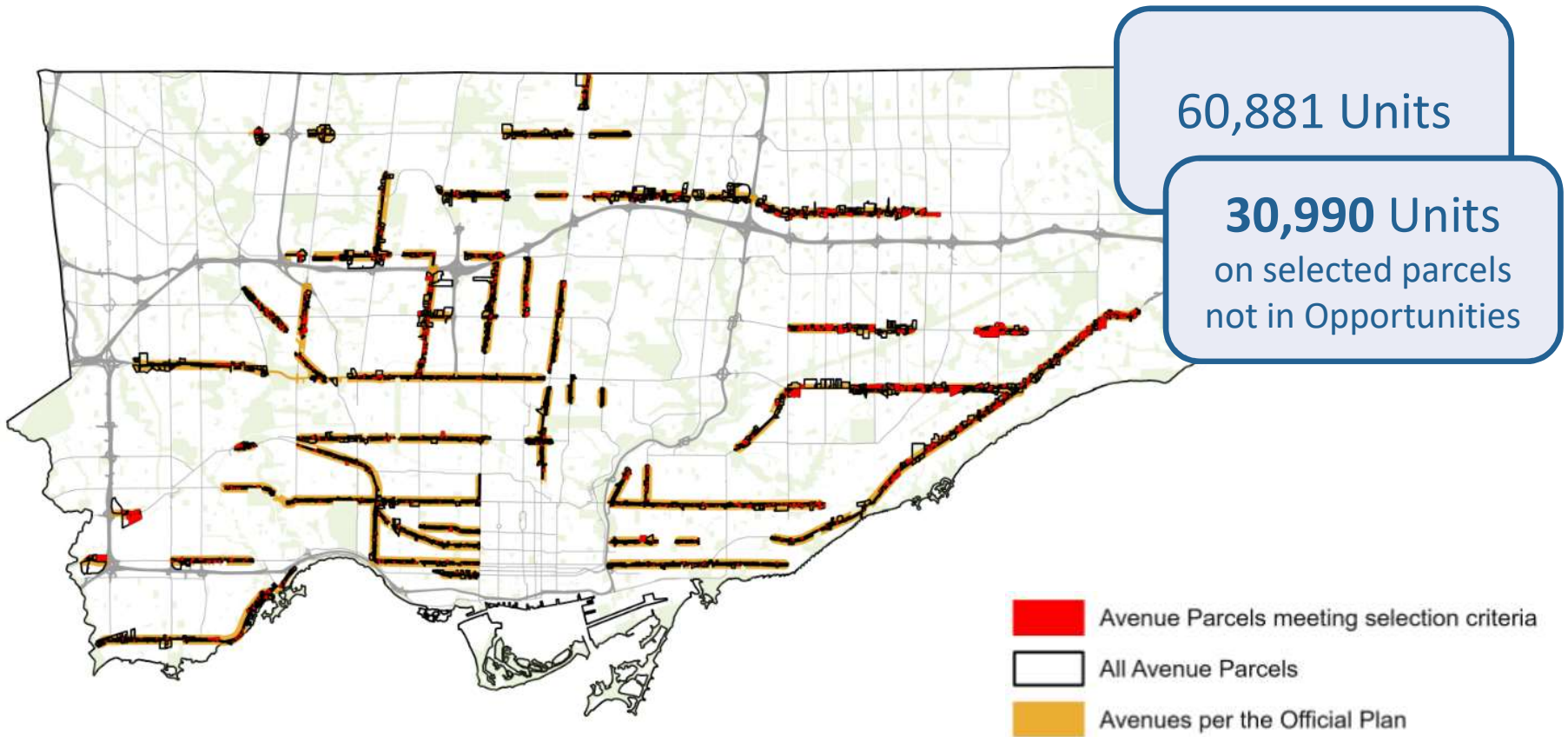
395,449
Units



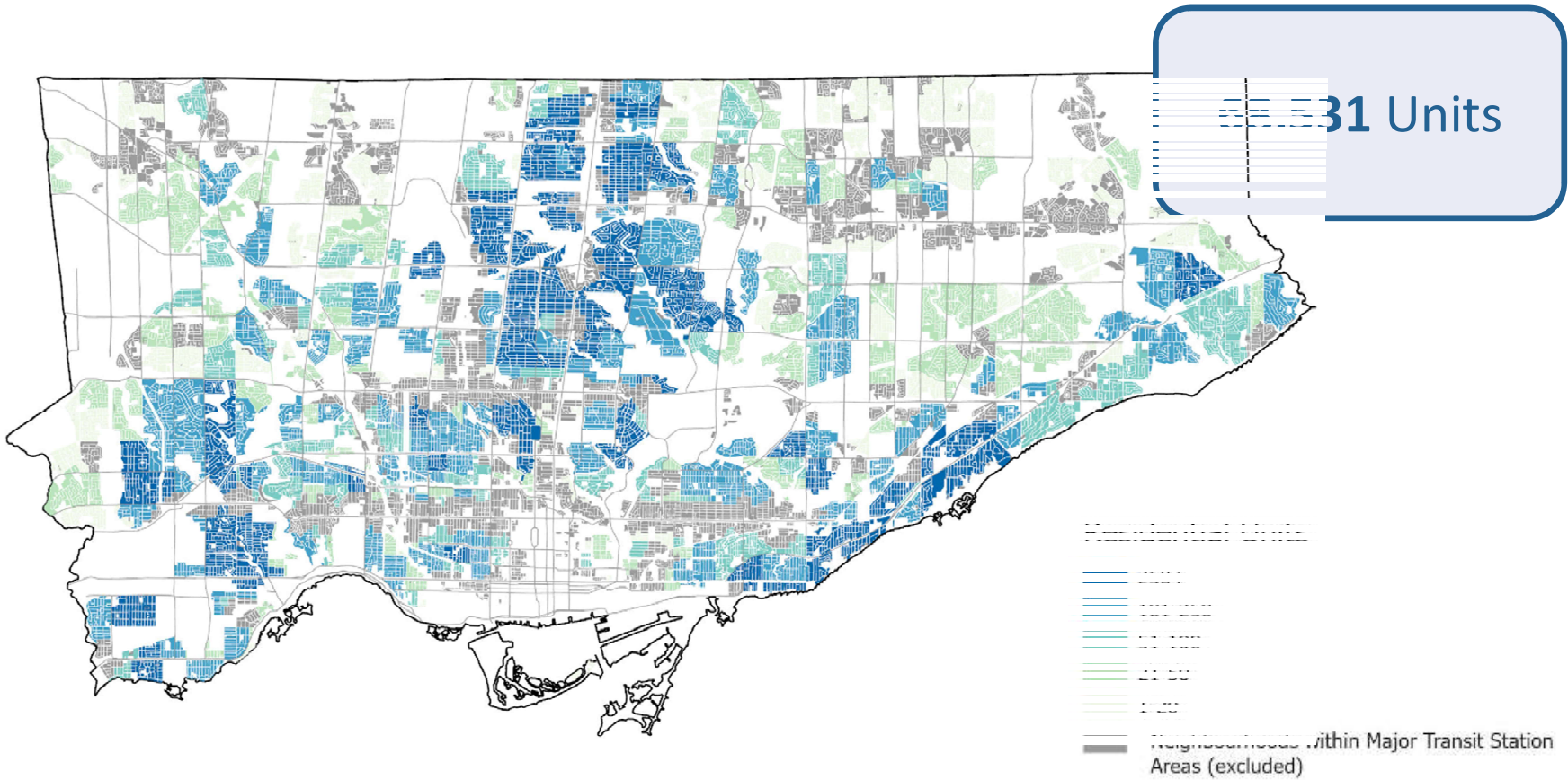
Downtown, Midtown and Centres



Avenues

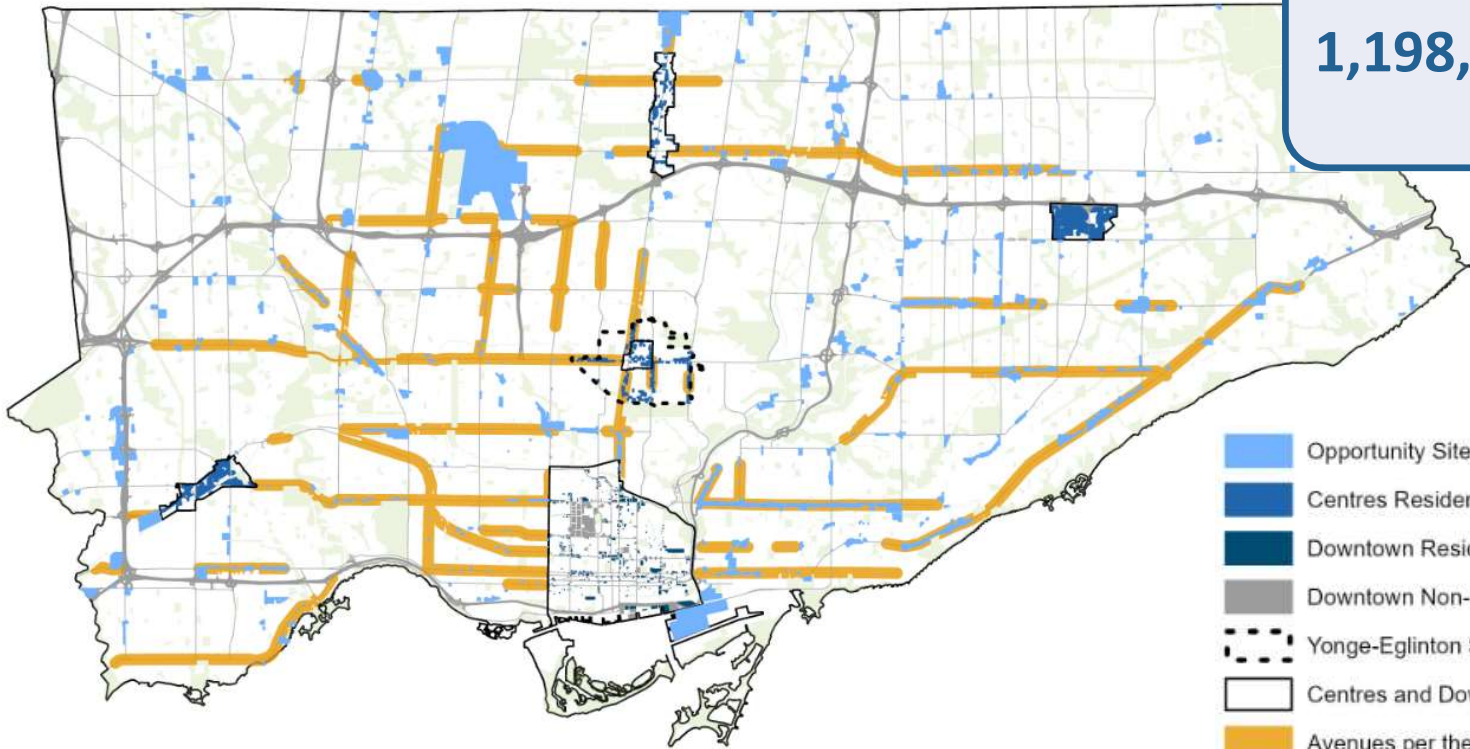


Neighbourhood Intensification



Potential Housing Supply

1,198,728 Units



- Opportunity Sites
- Centres Residential and Non-Residential Potential Sites
- Downtown Residential and Mixed Use Sites
- Downtown Non-Residential Sites
- Yonge-Eglinton Secondary Plan
- Centres and Downtown
- Avenues per the Official Plan
- Green Space
- Major Roads/Expressways

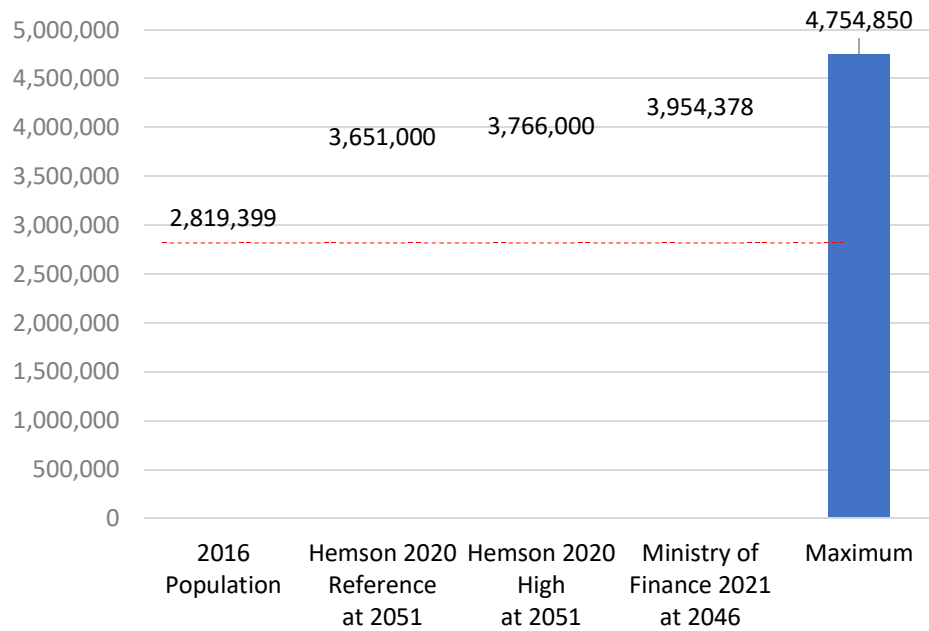
Potential Housing Supply

- 2016 Census Housing is **1,112,930** occupied private dwellings
- Hemson 2020 Reference Household Forecast is **430,900** households over thirty-five years to 2051
- Translates into **562,000** households based on housing occupancy rates and **566,000** units based on potential supply
- City's Net Potential Supply is **more than double the projected demand**
- Ministry of Finance projections translates into **791,440** households
- City's Net Potential Supply **has a surplus of 9 to 23 years** depending on composition of the supply

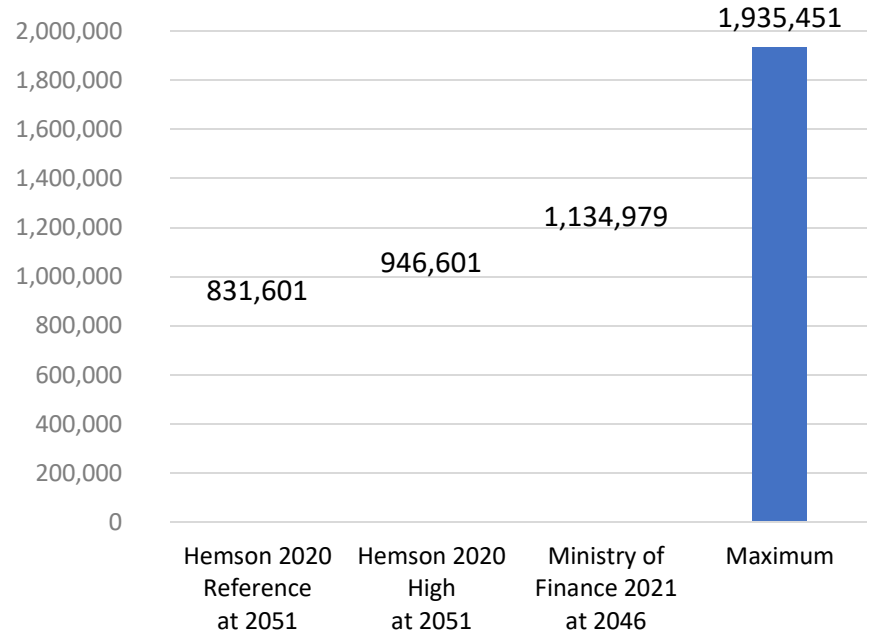
SOURCE OF SUPPLY	Ground Related units	Mid/High rise Apartments of 5 or more storeys	TOTAL POTENTIAL UNITS	Share
MCR Pipeline Built Projects	5,468	86,102	91,570	8.0%
MCR Pipeline Active Projects	7,820	155,630	163,450	14.4%
MCR Pipeline Under Review Projects	5,194	244,753	249,947	21.9%
Opportunities Potential	14,764	380,685	395,449	34.7%
Downtown Residential Potential	1,139	119,243	120,382	10.6%
Centres Residential Potential	1,197	77,212	78,409	6.9%
Avenues Residential Potential	3,129	27,861	30,990	2.7%
Neighbourhood Intensification	68,531	0	68,531	6.0%
TOTAL POTENTIAL SUPPLY	107,242	1,091,486	1,198,728	
Estimated Demolitions	-55,835	-3,986	-59,821	- 5.3%
NET POTENTIAL SUPPLY	51,407	1,087,500	1,138,907	100.0%

Population Growth

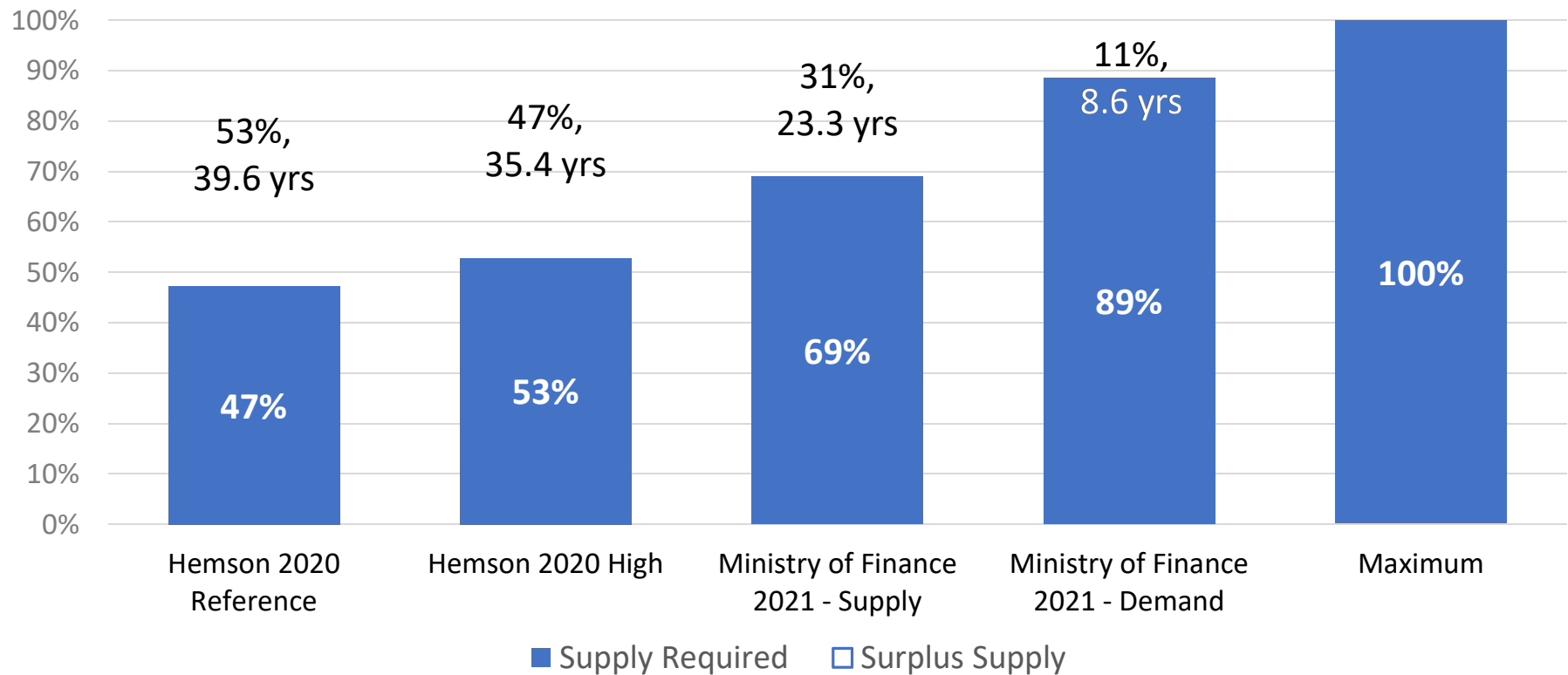
Population Forecasts and Projections



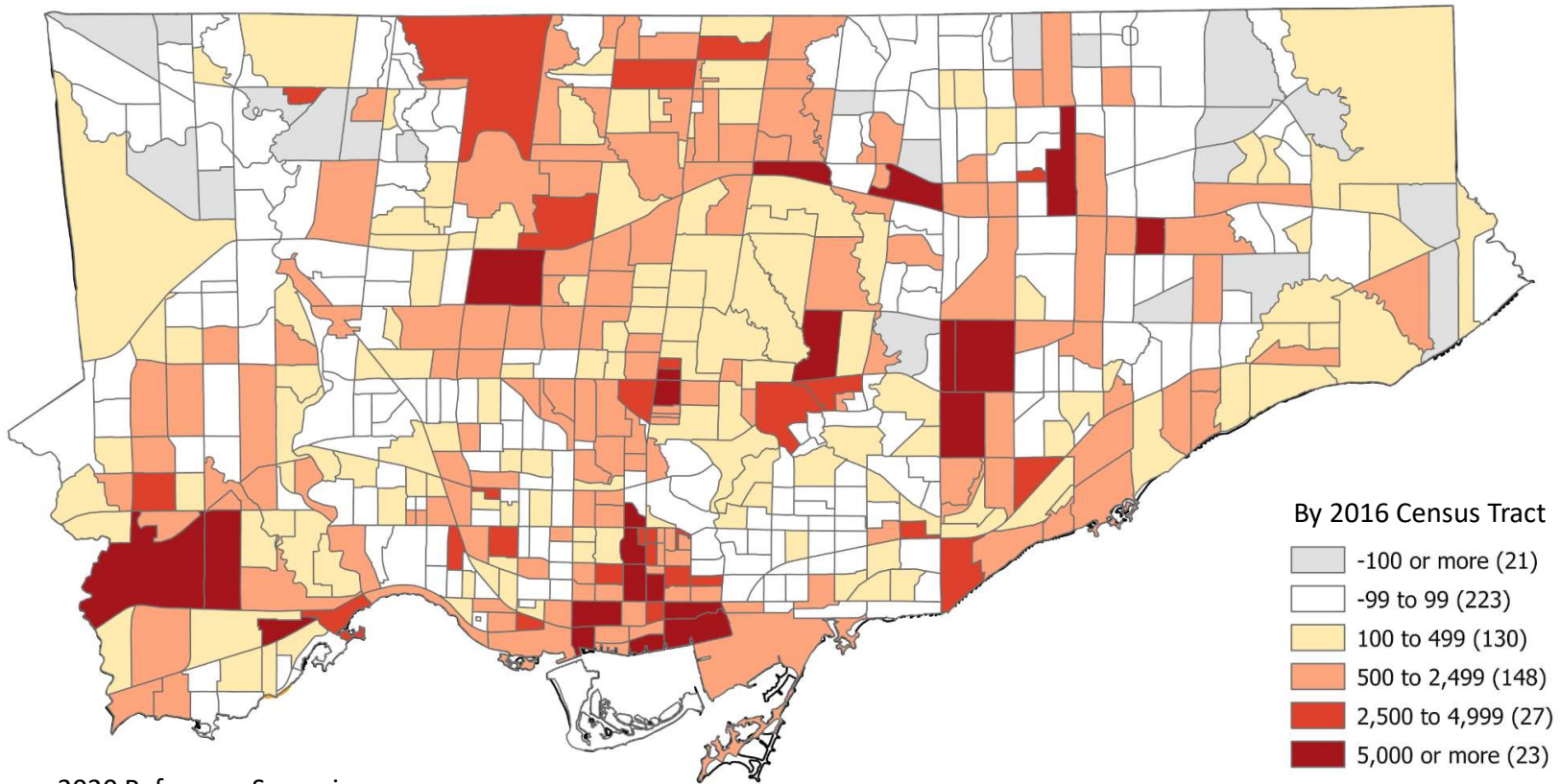
Population Growth versus 2016



Supply Surplus

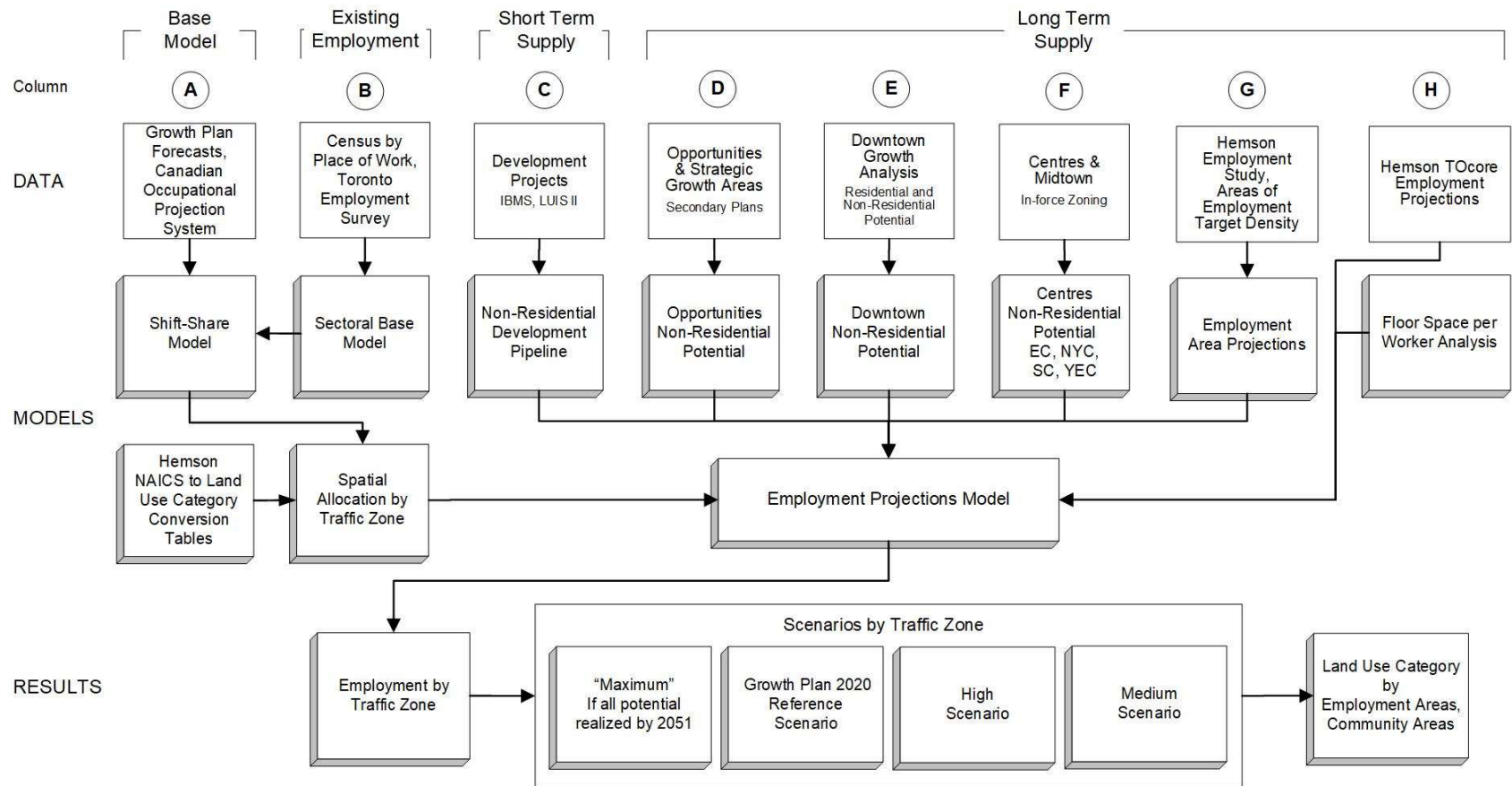


Projected Household Growth



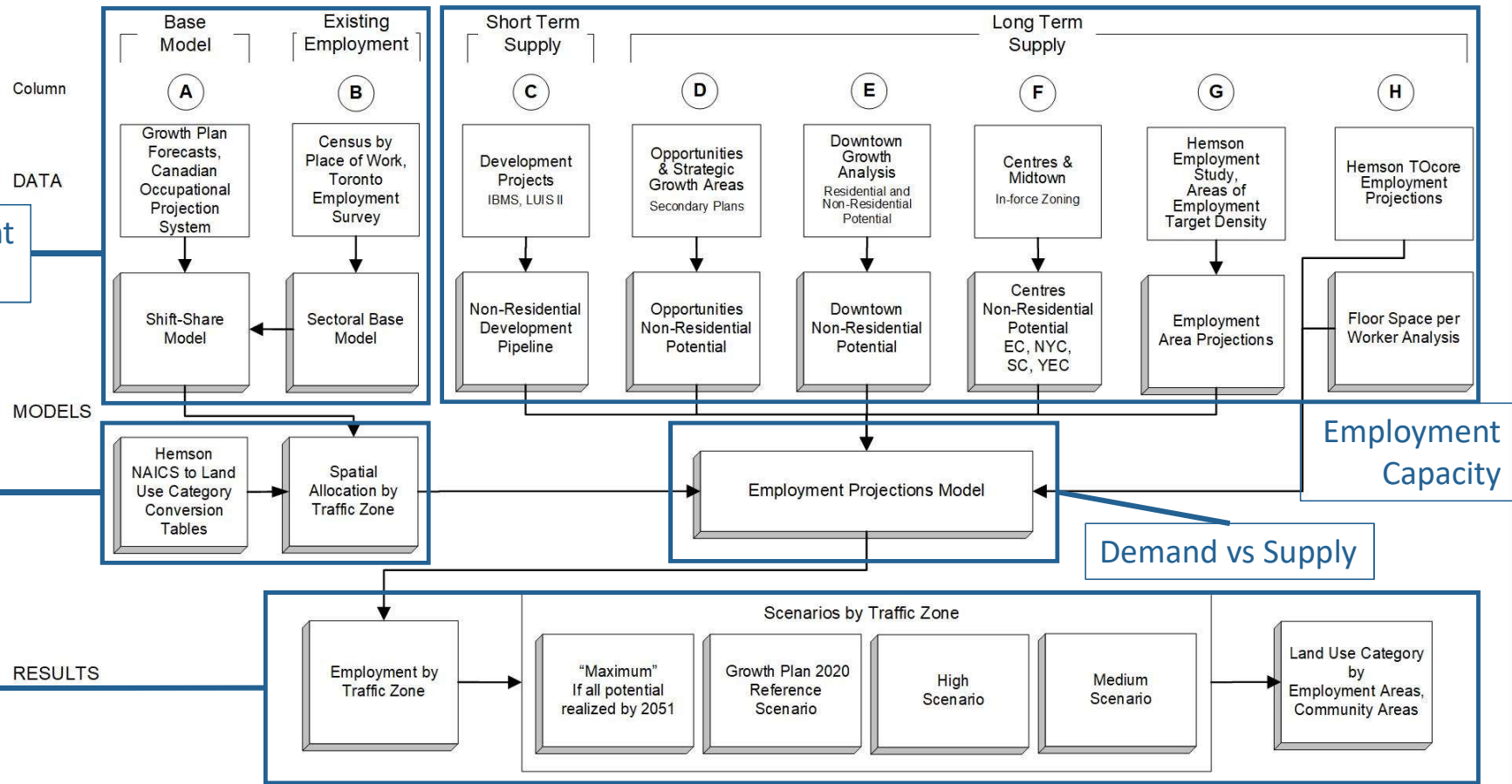
Hemson 2020 Reference Scenario

Land Needs Assessment Methodology: Employment Area Land Needs Assessment



Planning Research and Analytics, May 2022 External

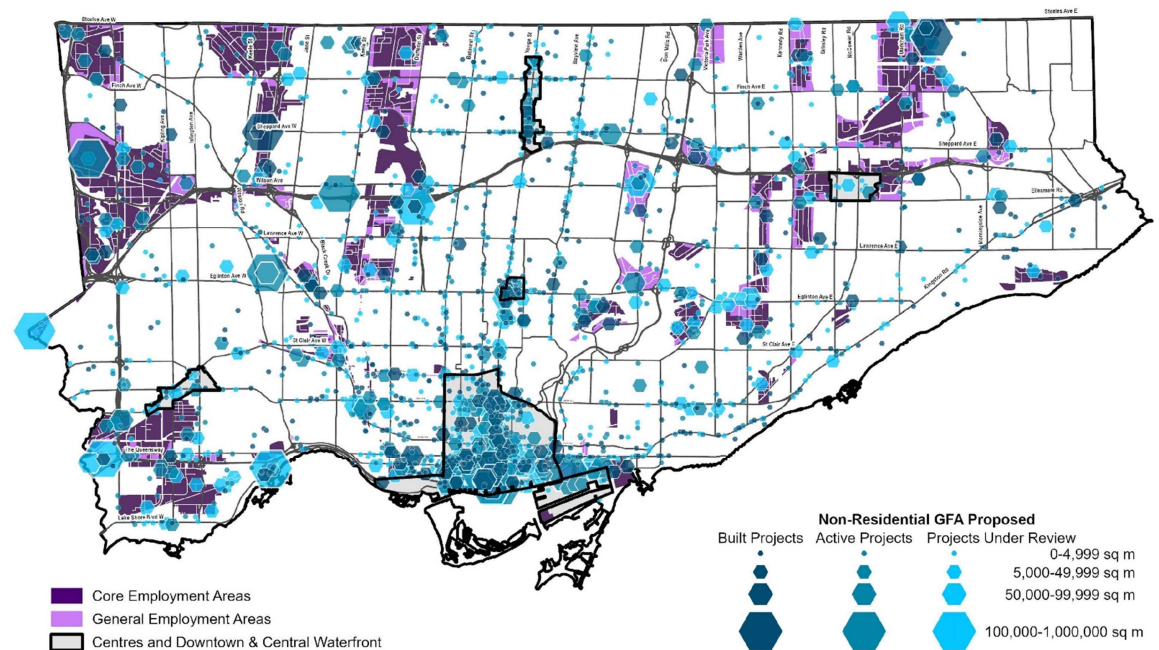
Land Needs Assessment Methodology: Employment Area Land Needs Assessment



Planning Research and Analytics, May 2022 External

Development Pipeline

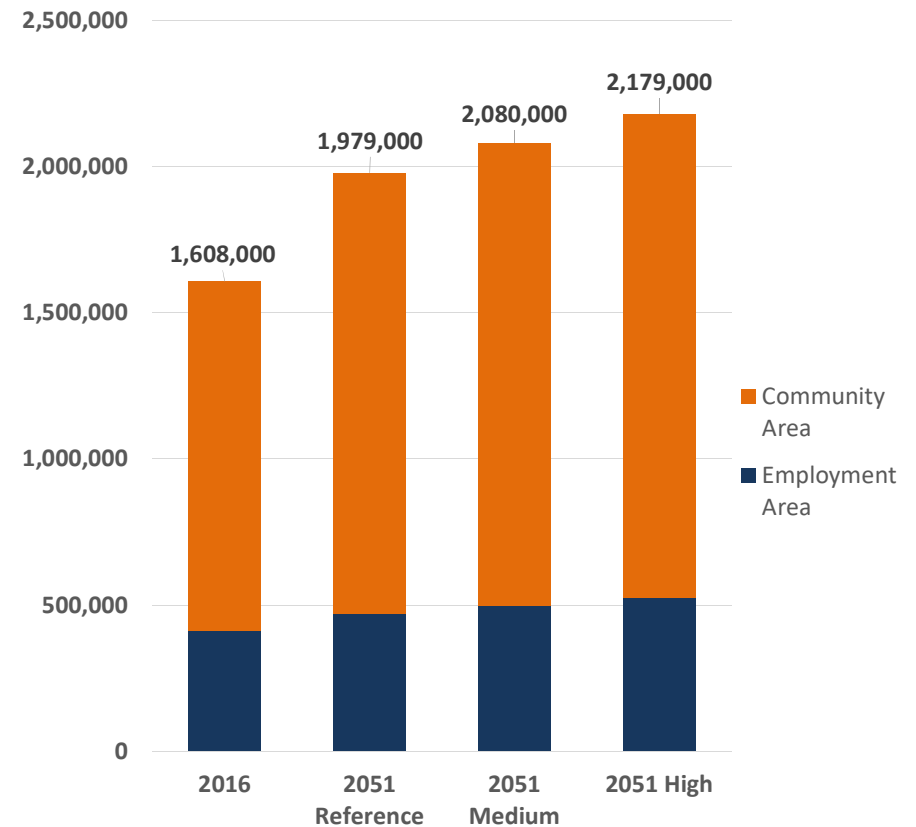
- Non-Residential Development proposals
- Proposal Activity January 2016 to June 2021
- 12.9 million square metres non-residential gross floor area
 - 3.0 million m² Built
 - 5.2 million m² in Active projects
 - 4.7 million m² Under Review



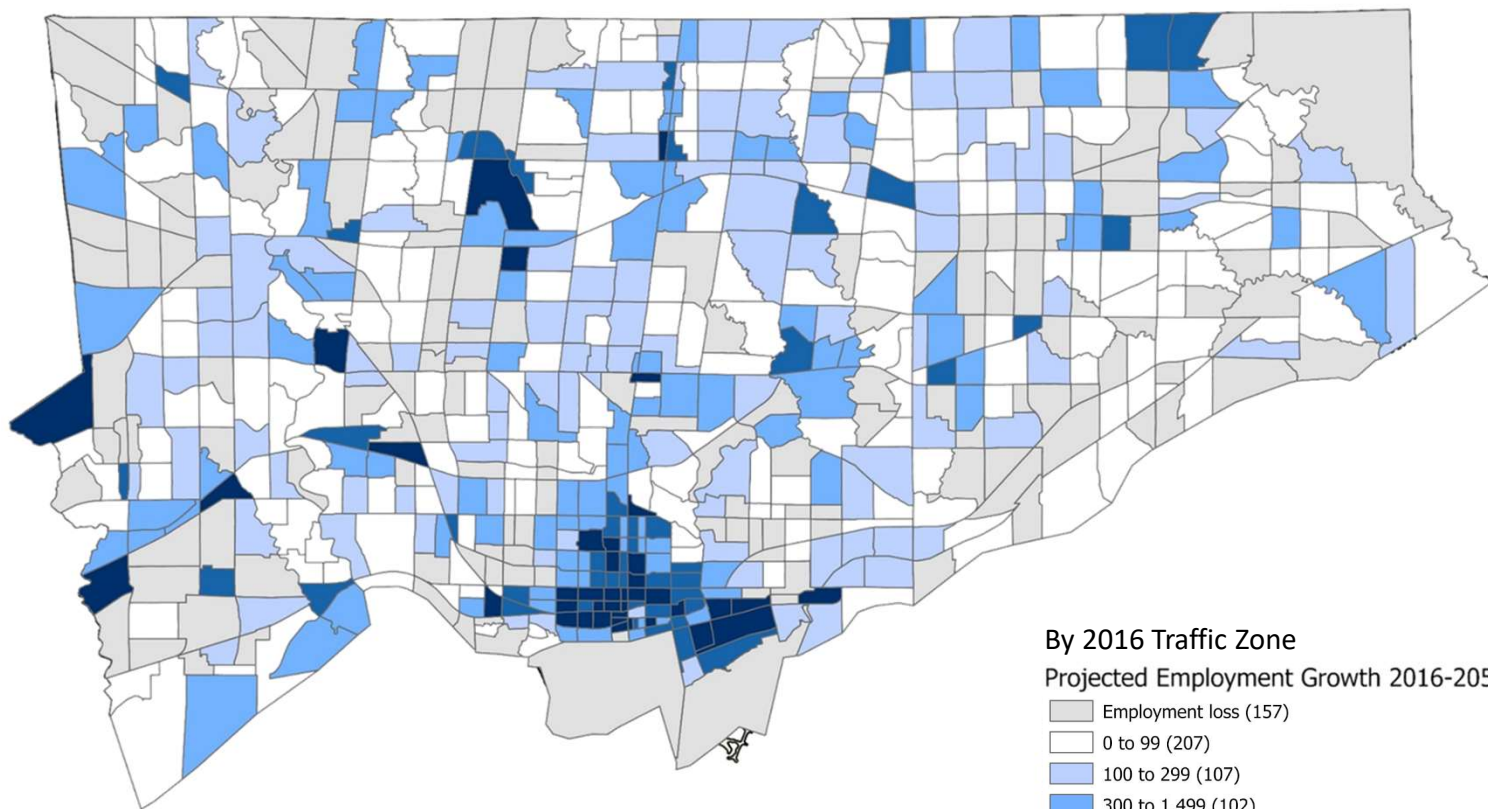
Projection Outcomes

- The Growth Plan forecasts **1,979,000 jobs** by 2051, an added **371,000 jobs** over 35 years.
- The preferred growth scenario is the Medium Scenario.
- This projection would see Toronto reach **2,080,400 jobs** by 2051, versus 1,979,000 in Schedule 3, **101,400 workers above the Growth Plan**.
- It would require Toronto adding about **13,500 jobs a year**, which is the same number the Employment Survey recorded Toronto adding from 2011 to 2021.

Employment Projection Scenarios



Projected Employment Growth 2016-2051

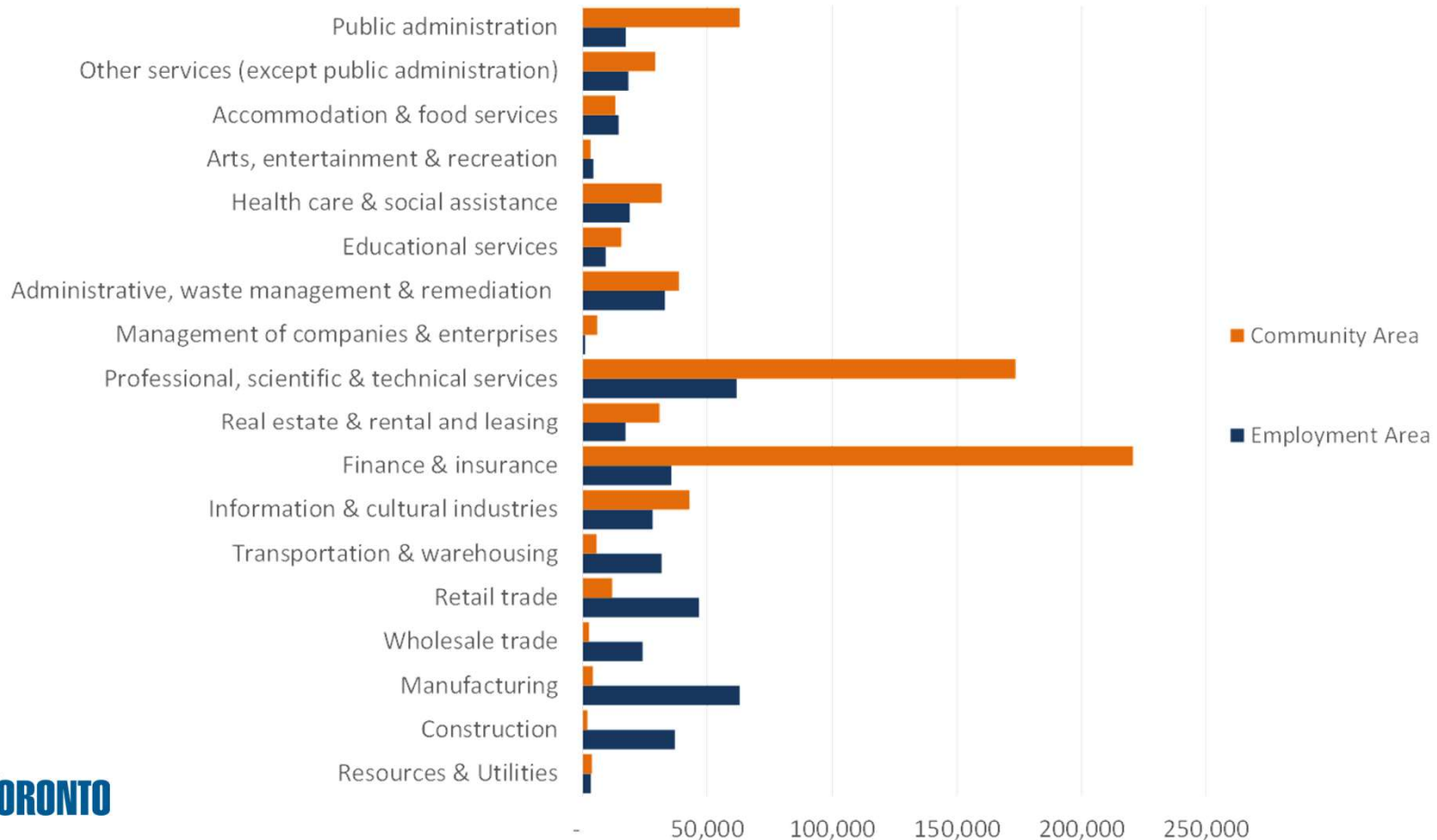


By 2016 Traffic Zone
Projected Employment Growth 2016-2051

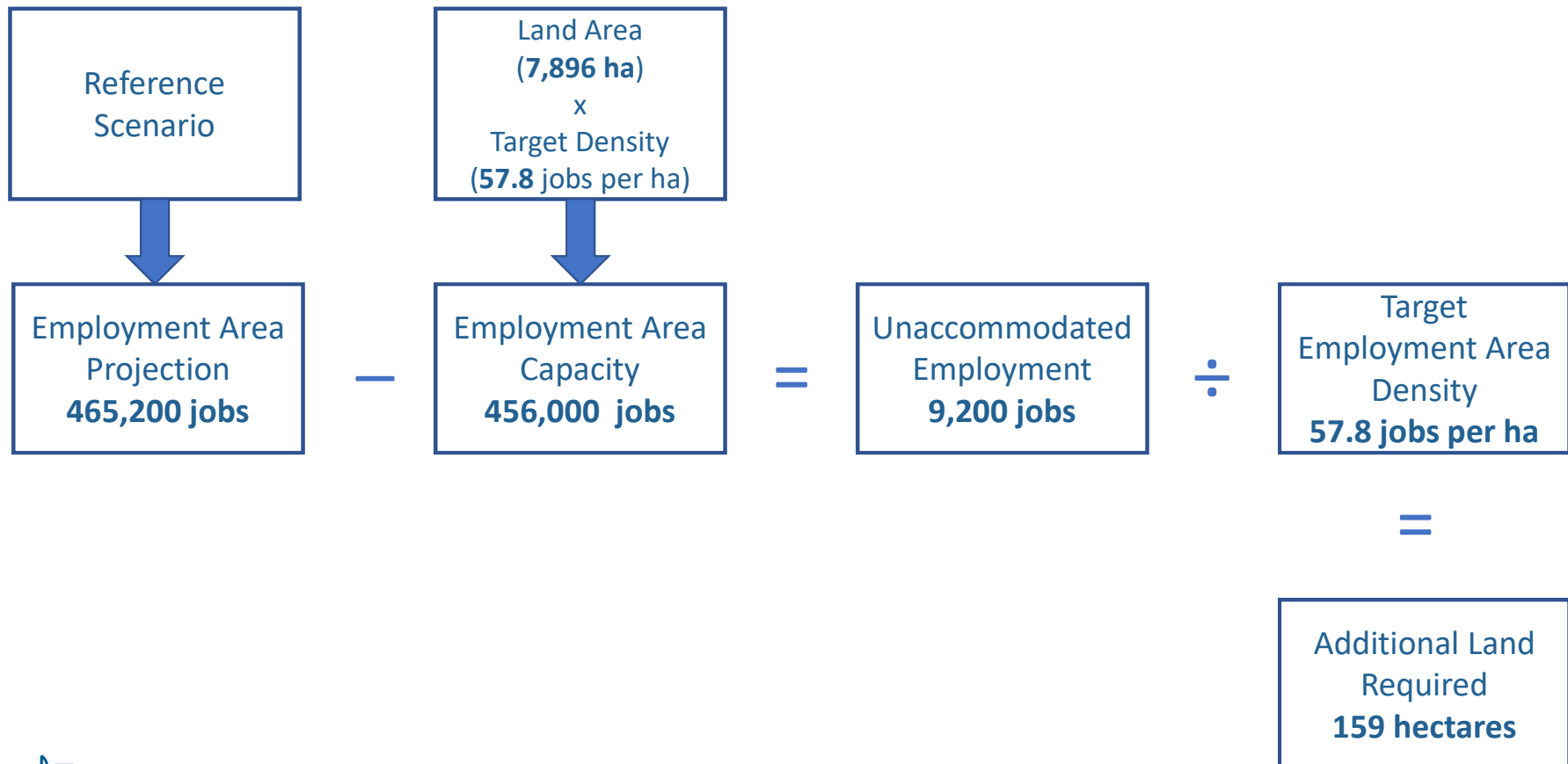
- Employment loss (157)
- 0 to 99 (207)
- 100 to 299 (107)
- 300 to 1,499 (102)
- 1,500 to 2,999 (46)
- 3,000 or more (40)

Employment Projections

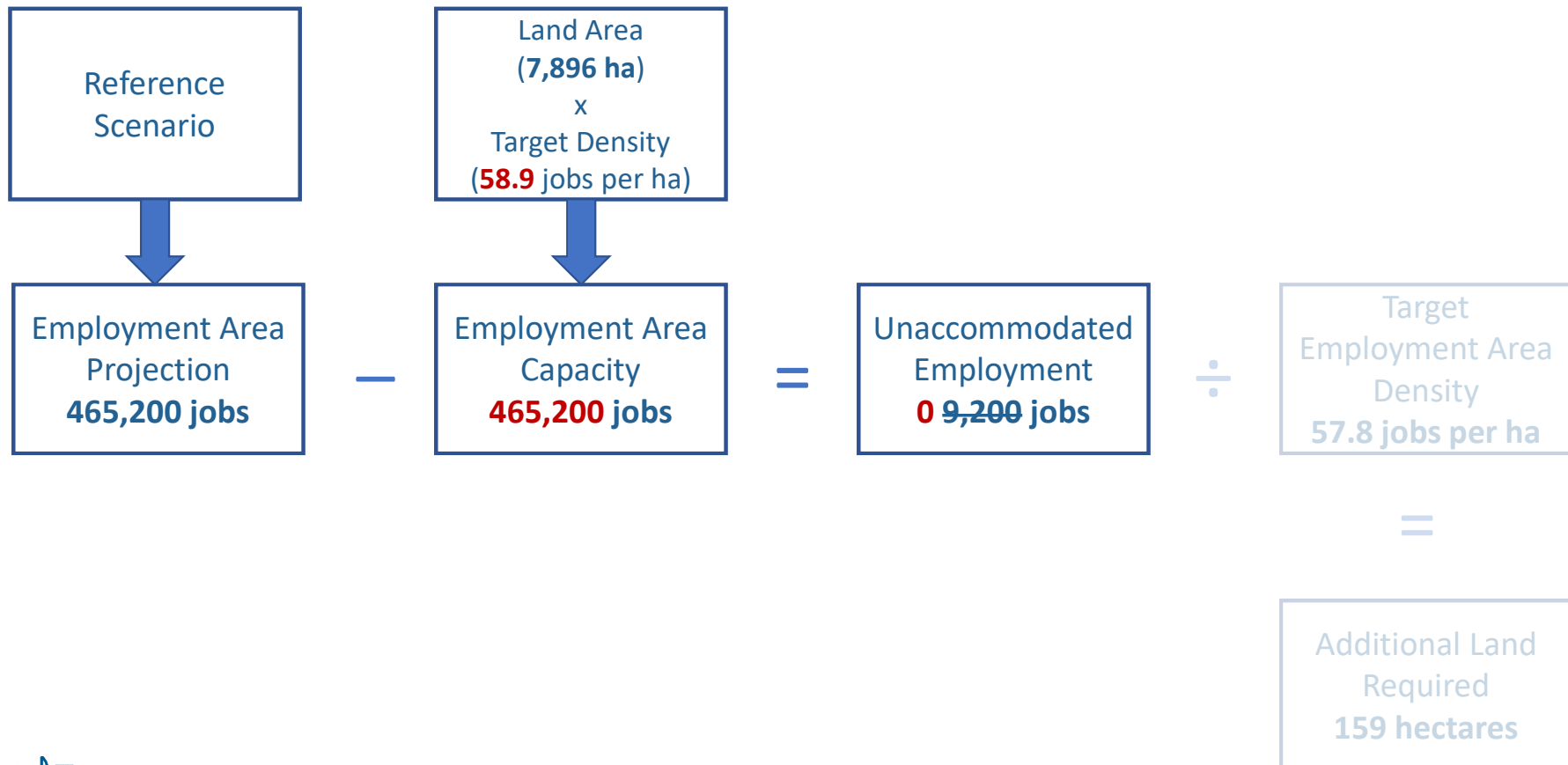
Medium Scenario 2051 Employment by Industry Sector



LNA Calculations – Constant Density



LNA Calculations – Constant Land Area



LNA Results

Community Area Land Needs (Housing)

- 2016 Census Housing is **1,112,930** occupied private dwellings.
- Hemson 2020 Reference Household Forecast is **430,900** households over 35 years to 2051.
- Translates into **562,000** households based on housing occupancy rates and **566,000** units based on potential supply.
- City's Net Potential Supply is **1,138,907** units which is **more than double the projected demand**.
- Ministry of Finance projections translates into **791,440** households.
- City's Net Potential Supply **has a surplus of 9 to 23 years** depending on composition of the supply.

Employment Area Land Needs (Jobs)

- Toronto has a shortfall of Employment Area land needs. While we expect to be able to overcome this through higher densities, it also means that **we need to retain our currently designated lands** in order to accommodate forecasted growth.
- **Toronto can accommodate the forecasted employment growth** as per Schedule 3 of the Growth Plan in areas designated for growth by the Official Plan.
- Toronto needs to retain its currently designated Employment Areas in order to accommodate the forecasted employment growth, and that **these lands will need to intensify to accommodate projected growth**.



Our Plan Toronto: Land Needs Assessment

Planning and Housing Committee
July 5, 2022

Planning Research and Analytics
City Planning Division
CityPlanning@toronto.ca