

# Information Report

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Service Area	Infrastructure, Development and Enterprise Services
Date	Friday, February 19, 2021
Subject	<b>Shaping Guelph – Housing Analysis and Strategy</b>

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## Executive Summary

### Purpose of Report

This report provides an overview of the Shaping Guelph: Growth Management Strategy (Shaping Guelph) Housing Analysis and Strategy (HAS) technical background study. This report also outlines community engagement that occurred that informed the HAS, and next steps for Shaping Guelph.

### Key Findings

The HAS is one technical background study that is required as part of the City's work to conform to A Place to Grow: Growth Plan for the Greater Golden Horseshoe (APTG). The purpose of the HAS is to confirm Guelph's population and housing needs to 2051 and outline an appropriate housing mix and density targets that conforms to APTG and aligns with the City's draft vision for growth.

The HAS confirms and recommends the following to be considered through the development of alternative growth scenarios and the growth management strategy:

- That Guelph has a sufficient supply of land to accommodate its forecast population of 203,000 people to 2051;
- That Guelph has a sufficient supply of land within its built-up area (BUA) to accommodate 50 per cent of its growth within this area to 2051. A minimum intensification target of 50 per cent should be included in the Official Plan;
- In 2019 Guelph's designated greenfield area was achieving an average density of approximately 52 persons and jobs per hectare. It is forecast that Guelph can achieve an average density of 66 persons and jobs per hectare within its designated greenfield area (DGA);
- A housing mix between 2016 and 2051 that continues to provide housing choices while increasing the share of high density housing from that which exists today responding to factors outlined in this report;
- There is capacity within the approved Downtown Secondary Plan to accommodate growth in the urban growth centre (downtown) (UGC) by 2051. Based on the approved DSP, the HAS suggests that a density of 200 persons and jobs per hectare can be achieved in the UGC by 2051. This density target should be reflected in the Official Plan;
- A boundary and density target for Guelph's major transit station area (MTSA) that is coincident with its UGC boundary, and;

- That an evaluation of the Official Plan urban structure, including an assessment of existing and new nodes and corridors and a determination of locations for strategic growth areas, occur as part of the growth scenario portion of Shaping Guelph.

The recommendations from the HAS will be considered through the preparation of alternative growth scenarios. The growth scenarios will consider different ways that Guelph can grow to achieve its vision for growth while complying with APTG. This will require testing out different assumptions such as alternative housing mixes, and/or different distributions of growth within the BUA and/or between the BUA and the DGA. Preliminary inputs from several infrastructure master plans, including water supply and wastewater treatment and biosolids management, will be considered as part of the development of growth scenarios.

## **Financial Implications**

Shaping Guelph is funded through PL0054 approved capital budgets with anticipated costs associated with consultant services and community engagement.

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## **Report**

### **Details**

In May 2019, the Province released A Place to Grow: Growth Plan for the Greater Golden Horseshoe (APTG). Amendment 1 to APTG was approved with an effective date of August 28, 2020. APTG guides growth and development within the Greater Golden Horseshoe over the next 30 years. APTG requires that Guelph plan for a population of 203,000 and an employment base of 116,000 jobs in 2051.

In October 2019, Council endorsed a process for Guelph to conform to APTG – Guelph’s municipal comprehensive Official Plan review (MCR). The MCR is known as Shaping Guelph: Growth Management Strategy (Shaping Guelph). The Shaping Guelph process includes several technical background studies that have been and will be prepared throughout 2020 and 2021. These are:

- Confirmation of a vision and principles for growth –completed
- A residential intensification analysis - completed
- An employment lands strategy - completed
- A housing analysis and strategy – this report, and
- Growth scenario planning (based on a land needs assessment).

An overview of the scope of each of these studies was provided in report [IDE-2019-91](#).

### **What the housing analysis and strategy is about**

The Housing Analysis and Strategy (HAS) is one of the technical background studies of Shaping Guelph. The HAS:

- Confirms Guelph’s population and housing needs to 2051
- Assesses Guelph’s ability to meet the forecasts and targets of APTG, and
- Analyzes and outlines an appropriate housing mix and density targets that conforms to APTG and aligns with the City’s draft vision for growth.

The recommendations from the HAS will be considered through the preparation of alternative growth scenarios and the growth management strategy. These recommendations may be re-evaluated to respond to the growth scenario work and community and council input on them. Approval of a housing strategy, including targets and densities, for Guelph will be considered as part of the growth management strategy later in 2021.

### **Built-up area**

APTG requires that a minimum of 50 per cent of new housing units each year be directed to the built-up area. Through community conversations in 2020 we heard there was a preference to direct growth to the built-up area rather than grow outside of the city's geographic boundaries.

The HAS forecasts the need for a minimum additional 12,500 residential units to 2051. The Residential Intensification Analysis (RIA) determined that there is capacity within the built-up area for the additional units needed to 2051 and more.

In consideration of the above, achieving a minimum of 50 per cent of new residential units within Guelph's built-up area from 2022 to 2051 is reasonable.

### **Designated greenfield area**

Guelph's designated greenfield area (DGA) is composed of lands that are part of already-approved development applications, referred to as committed lands, and vacant lands. Most of Guelph's vacant DGA lands are in Guelph Innovation District and Clair-Maltby Secondary Plan areas. APTG requires that lands within the DGA be planned at a minimum density of 50 persons and jobs per hectare. As of 2019, Guelph's DGA was achieving a density of 52 persons and jobs per hectare. In consideration of Guelph's supply of committed lands and the existing and planned densities for the remainder of the DGA, it is anticipated that Guelph can achieve a density of 66 persons and jobs per hectare on average exceeding the minimum APTG DGA target and aligning with the visions for the GID and CMSP areas.

### **Urban growth centre**

Through community conversations in 2020 we heard that there was a preference for growth to continue to be directed to the urban growth centre (downtown). The HAS considered capacity work that was prepared as part of the Downtown Secondary Plan to evaluate potential growth opportunities in downtown to 2051 and confirmed that there is capacity within the approved Downtown Secondary Plan (DSP) to accommodate additional growth to 2051. Based on the approved DSP, the HAS suggests that a density of 200 persons and jobs per hectare can be achieved downtown by 2051.

### **Major transit station area**

APTG has identified Guelph's central station downtown as a major transit station. APTG requires that a major transit station area (MTSA) boundary be delineated through Shaping Guelph and a density target be considered. Through community conversations in 2020 we heard that an MTSA boundary that was the same as Guelph's UGC boundary made sense. We also heard that there were opportunities to consider improved connections from areas outside of the UGC to the central station. The HAS recommends that the boundary for the MTSA be the same as the

UGC boundary and because of this the UGC density target also apply to the MTSA – 200 persons and jobs per hectare by 2051.

### Guelph’s population forecast to 2051

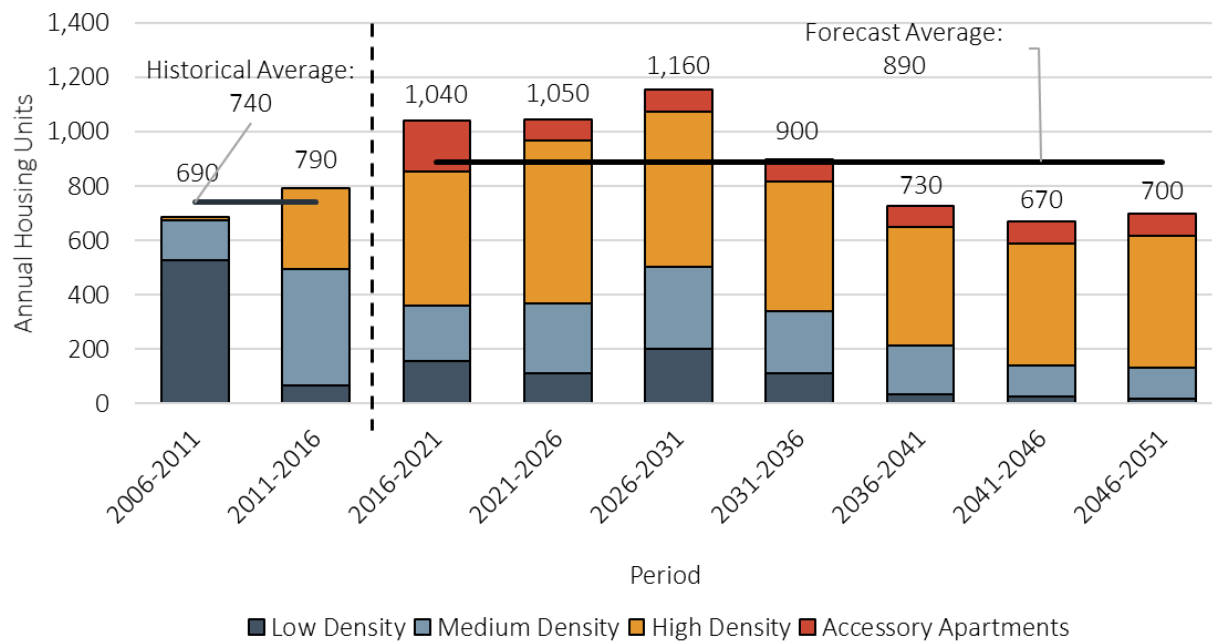
Based on the above, the HAS confirms that Guelph has an adequate supply of land to accommodate its forecast population growth of 203,000 people to 2051.

Additional ongoing work through the city’s master plans will confirm the infrastructure needed to support this growth.

### Guelph’s housing mix

The HAS outlines several factors that will influence Guelph’s housing supply in the future. These include the projected demographic make-up of Guelph and their housing preferences, the affordability of housing, and the projected increase in non-permanent residents, those that have a primary home outside of Guelph. These factors, together with requirements to meet the minimum APTG targets, and in consideration of the approved and in progress secondary plans within the DGA, a target housing mix from 2016 to 2051 has been forecast (Figure 1). Forecast housing demand from 2016 to 2051 consists of 10 per cent low-density housing, 22 per cent medium-density housing, 56 percent high-density housing, and 11 per cent accessory apartment units with an increasing shift towards high-density occurring during the forecast period.

**Figure 1 - Annual Census housing forecast by structure type 2016-2051**



**Note:**

- Low Density includes singles and semis.
- Medium density includes townhouses and apartments in duplexes.
- High Density includes bachelor, 1-bedroom and 2-bedroom + apartments (excludes accessory apartments)
- Accessory apartments are embedded in the Census data provided between 2006 to 2016.
- Figures have been rounded.

Source: 2006 to 2016 derived from Statistics Canada 2006 to 2016 Census data. 2016 to 2051 forecast by Watson & Associates Economist Ltd., 2020.

## **Urban structure**

Guelph's Official Plan includes an urban structure which is based on a nodes and corridors model of growth. This structure promotes a compact urban form by promoting mixed-use and transit supportive land uses in key areas of the city, such as downtown and within nodes and corridors. This urban structure also identifies the BUA and DGA. The Official Plan also plans for growth generally throughout these areas.

The HAS confirmed that there is enough supply of land in Guelph to accommodate Guelph's forecasted population growth. Where this growth is directed will continue to be explored through the development of growth scenarios and the assessment of the existing Official Plan urban structure. Through the next stages of Shaping Guelph an evaluation of the existing nodes and corridors and new nodes and corridors will be examined based on the technical work completed through the RIA, HAS, and community conversations completed to date. A hierarchy of nodes and corridors will be considered through this work to determine strategic growth areas and establish a function for different nodes and corridors.

## **Recommendations summary**

The HAS confirms and recommends that the following be considered through the alternative growth scenarios and the growth management strategy:

- That Guelph has a sufficient supply of land to accommodate its forecast population of 203,000 people to 2051;
- That Guelph has a sufficient supply of land within its built-up area (BUA) to accommodate 50 per cent of its growth within this area to 2051. A minimum intensification target of 50 per cent should be included in the Official Plan;
- In 2019 Guelph's designated greenfield area was achieving an average density of approximately 52 persons and jobs per hectare. It is forecast that Guelph can achieve an average density of 66 persons and jobs per hectare within its designated greenfield area (DGA);
- A housing mix between 2016 and 2051 that continues to provide housing choices while increasing the share of high density housing from that which exists today responding to factors outlined in this report;
- There is capacity within the approved Downtown Secondary Plan to accommodate growth in the urban growth centre (downtown)(UGC) by 2051. Based on the approved DSP, the HAS suggests that a density of 200 persons and jobs per hectare can be achieved in the UGC by 2051. This density target should be reflected in the Official Plan;
- A boundary and density target for Guelph's major transit station area (MTSA) that is coincident with its UGC boundary, and;
- That an evaluation of the Official plan urban structure, including as assessment of existing and new nodes and corridors and a determination of locations for strategic growth areas, occur as part of the growth scenario portion of Shaping Guelph.

## **Next steps**

The HAS, together with the other technical background studies, are being considered as part of the development of growth scenarios and the growth management strategy. Preliminary inputs from several infrastructure master plans,

including water supply, and wastewater treatment and biosolids management, will also be considered as part of the development of growth scenarios. Growth scenarios will be presented to the community and council in April where input and preferences about the scenarios and the proposed evaluation criteria will be gathered.

Additionally, together with the development of growth scenarios, an evaluation of existing nodes and corridors and new nodes and corridors will be examined. The results of this evaluation will inform a recommended updated urban structure which will be presented to the community and Council in April.

The recommendations from all of the technical background studies may be re-evaluated in response to the growth scenario work and community and council input on them. Approval of a housing strategy, including targets and densities, for Guelph will be considered as part of the growth management strategy later in 2021.

### **Financial Implications**

Shaping Guelph: Growth Management Strategy is funded through PL0054 approved capital budgets with anticipated costs associated with consultant services and community engagement.

### **Consultations**

In August and September 2020 we had conversations with the community and stakeholders about where and how to grow. Additionally, in November and December 2020 we had conversations with the community and stakeholders about one growth scenario for Guelph and options for other growth scenarios to be explored. Input was also sought about proposed boundaries for Guelph's MTSA. A summary of the input that was received is available on the [Have Your Say Shaping Guelph page](#). This input was considered in the preparation of the HAS and will inform the growth scenario work and growth management strategy to come in 2021.

### **Strategic Plan Alignment**

The Shaping Guelph: Growth Management Strategy project aligns with the following priorities within the Strategic Plan:

Building our future – the HAS examines Guelph's existing supply of housing and forecasts the amount and type of housing needed for Guelph to 2051. The HAS sets the stage for continued work through Shaping Guelph to explore growth options that will examine different places that new housing can go providing housing choices and increasing the availability of housing that meets community needs.

Sustaining our future – the HAS confirms that Guelph has the land supply to accommodate its forecast population within its existing boundary and to accommodate 50 per cent of its growth each year within already developed areas – the built-up area. This will assist in planning and designing an increasingly sustainable city as Guelph grows.

### **Attachments**

Attachment-1: Shaping Guelph Housing Analysis and Strategy

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**Shaping** Guelph

**Housing Analysis and Strategy  
Shaping Guelph:  
Growth Management Strategy**

**February 2021**



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# 1 Introduction

## 1.1 Guelph Official Plan review context

The City of Guelph is undertaking a review of its Official Plan (OP), the guiding planning document that provides the long-term framework for growth, development, and the protection of many valuable cultural and natural heritage resources located across the City. It is a legal document under the Planning Act that contains the goals, objectives, and policies to manage and direct physical (land-use) change, and its effects on the cultural, social, economic, and natural environment within the community.

This review builds on the foundation of the existing OP. It includes a number of technical studies to update the recommended approach for managing population and employment growth to 2051 within the City of Guelph. The existing 2018 OP

replaced the previous OP that was adopted by Council in November, 1994 and approved by the Minister of Municipal Affairs in December, 1995. The OP went through a Municipal Comprehensive Review (MCR) and comprehensive update in 2001 and subsequently was amended three times to address provincial policy conformity:

- Phase 1 – OPA 39: Brought the OP into conformity with the Growth Plan and adopted by City Council on June 10, 2009 and approved by the Ministry of Municipal Affairs and Housing in November 20, 2009 and is in full force and effect.
- Phase 2 – OPA 42: Introduced a Natural Heritage Strategy which established a sustainable greenspace network throughout the City and was adopted by Council in July 2010 and approved by the Ontario Municipal Board (OMB) in June 2014 as is in full force and effect.
- Phase 3 – OPA 48: Final phase of the five-year review was approved with modifications by the Ministry of Municipal Affairs and Housing in December 2013 and approved by the OMB in October 2017.

As seen in Phase 1, the Growth Plan conformity component was done through OPA 39 and was based on the 2006 Growth Plan. Since then, there have been several updates to provincial policies as well as a number of emerging growth pressures. On May 2, 2019, the Province approved further updates to the Growth Plan and reissued it as A Place to Grow: Growth Plan for the Greater Golden Horseshoe (APTG), which took effect on May 16, 2019, and on August 28, 2020 Amendment 1 to APTG, 2019 came into force and effect. The amendment includes changes to the population and employment forecasts, extending the horizon year for planning to 2051, and other policies designed to increase housing supply, create jobs, attract business investment, and better align with infrastructure. The City is required to bring its OP into conformity with APTG (including Amendment 1) by July 1, 2022.

These provincial policy and legislative documents provide direction for municipalities on land use planning, including where and how to plan for growth. The latest round of changes to these documents seek to address some of the implementation issues associated with the former Growth Plan. The changes also seek to overcome some of the ongoing challenges facing municipalities in the Greater Golden Horseshoe (GGH), including increased demand for infrastructure, increased traffic congestion resulting in delays in the movement of people and goods, and decreased housing affordability to name a few. In addition to these changes, the Province also recently enacted Bill 108, the More Homes, More Choice Act, 2019, to make additional changes to the Planning Act, the Local Planning Tribunal Act, the Development Charges Act, and other legislation. The project team will continue to monitor any changes to Ontario's planning system and their implications to the analysis in this study.

## 1.2 Shaping Guelph

The policies and mapping of the OP will be updated to reflect matters of provincial interest under the Planning Act, to be consistent with the 2020 Provincial Policy Statement (PPS) and to conform to APTG (including Amendment 1). The MCR, known as Shaping Guelph, is the City’s response to APTG which will ultimately result in an Official Plan Amendment (OPA). Any changes required to conform to the PPS and amendments to the Planning Act are being considered through the city’s companion Official Plan review (OPR) and is not within the scope of this study.

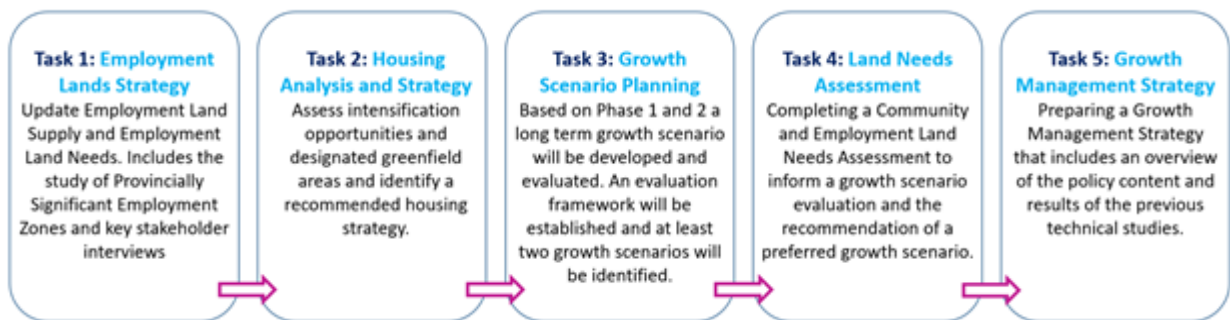
The overall purpose of the MCR is to recommend a Growth Management Strategy (GMS) that sets out updated growth-related directions and policies to bring the City of Guelph OP into conformity with APTG.

The Shaping Guelph technical work includes a review of 2051 growth projections; a housing analysis and strategy, employment lands strategy, a lands needs assessment which will then feed into the growth management strategy and ultimately selecting the preferred growth scenario which will inform a future OPA.

Dillon Consulting Limited (Dillon) and Watson & Associates Economists Ltd. (Watson) were retained by the City to undertake the growth related components of Shaping Guelph. The process of preparing the City’s new OP represents a Municipal Comprehensive Review (MCR), in accordance with Section 26 of the Planning Act. The process will align with and conform to provincial methods. The technical work includes a review of 2051 growth projections; a housing analysis and strategy, employment lands strategy, a lands needs assessment which will then feed into the growth management strategy and ultimately selecting the preferred growth scenario which will inform a future OPA.

The technical work that is part of Shaping Guelph is being undertaken in five tasks as described in Figure 1-1 below:

**Figure 1-1: Shaping Guelph technical studies process**



In addition to the technical work of Shaping Guelph outlined above the City is also undertaking a number of other background studies including:

- A review of the City's vision and principles for growth
- Residential Intensification Analysis

The results of these background studies will be considered as part of the growth analysis work of Shaping Guelph.

A comprehensive consultation and community engagement program is being led by LURA Consulting (LURA) on behalf of the City. The Dillon and Watson team will be working closely with LURA and the City to support the engagement components of this study. The feedback and input resulting from the engagement activities will inform all aspects of Shaping Guelph.

### **1.3 Housing Analysis and Strategy purpose and organization**

The purpose of the Housing Analysis and Strategy (HAS) is to confirm the City's population and housing needs to 2051 and recommend a policy framework that addresses provincial conformity while aligning with the City's vision for growth. The HAS will also determine the appropriate mix of housing, and density targets to 2051. This strategy includes an analysis on the APTG minimum targets as they relate to specific geographies in the City of Guelph (intensification target, Designated Greenfield Area density, Urban Growth Centre density and targets for other Strategic Growth Areas).

The Housing Analysis and Strategy is organized into the following six (6) sections:

- Section 1 presents the introduction and the purpose of the Housing Analysis and Strategy;
- Section 2 outlines the existing provincial and municipal policy framework for housing growth within the city and identifies gaps in the existing municipal policy that will need to be addressed as part of provincial conformity;
- Section 3 provides an overview of the demographic and socio-economic drivers of housing intensification within the city, including commentary on the demographic breakdown of Guelph's residents, market demand for housing types, locational attributes, shifting trends, housing affordability and the impact of non-permanent residents;
- Section 4 presents the housing forecast for the city to 2051, including a review of the historical demand for growth within the built-up area and anticipated future demand to 2051 by structure type;



- Section 5 presents the land supply and intensification opportunities associated with the City’s urban structure, with an outline of the physical supply and opportunities for intensification across the city’s built-up area and recommendations on the location, function and potential density targets for a number of element of the urban structure;
- Section 6 presents recommendations to guide the City of Guelph Housing Strategy and growth analysis as part of the municipal comprehensive review.

## **1.4 Definitions and terminology**

The following are definitions for key terms that are used within the Housing Analysis and Strategy.

### **Accessory apartment**

A dwelling unit that is self-contained, subordinate to and located within the same building or on the same lot as a primary dwelling unit. These are often referred to as secondary dwelling units, granny flats, or basement apartments with separate kitchen areas.

### **A Place to Grow: Growth Plan for the Greater Golden Horseshoe (APTG)**

APTG is the Province of Ontario’s plan to manage growth and development throughout the greater golden horseshoe that protects the environment and supports economic prosperity. APTG sets out population and employment forecasts and targets that municipalities are required to plan for.

### **Built-up area**

Areas of Guelph that were developed before 2006. APTG defines built-up areas as “the limits of developed urban areas as defined by the Minister for the purpose of measuring the minimum intensification targets”.

### **Density**

Can be measured in different ways. APTG refers to density as the number of people living or working in an area measured per hectare. Density can also be used to measure the number of residential units or amount of buildings located on a site. This is often shown as units per hectare or floor space index.

### **Designated greenfield area**

Areas towards the edge of Guelph that were not yet developed before 2006. Designated greenfield areas are defined in APTG as the area outside of the delineated built-up area and within settlement areas.

**Employment areas**

APTG and the PPS define employment areas as “areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities”. Employment Area refers to a cluster of employment lands.

**Intensification**

APTG and the PPS, defines intensification as “the development of a property, site or area at a higher density than currently exists through: redevelopment, including the reuse of brownfield sites; the development of vacant and/or underutilized lots within previously developed areas; infill development; and, the expansion or conversion of existing buildings”.

**Intensification corridor**

Areas along major roads or higher order transit corridors that have the potential to provide a focus of higher-density, mixed-use development. The existing intensification corridors identified in Guelph’s Official Plan include:

- Gordon Street
- Stone Road West
- York Road
- Eramosa Road
- Woolwich Street
- Silvercreek Parkway North

**Major office**

In APTG, a major office is defined as “Freestanding office buildings of approximately 4,000 square metres of floor space or greater, or with approximately 200 jobs or more.” In the Housing Analysis and Strategy, the phrase Major Office is generally used in regard to buildings that accommodate Major Office employment and are aligned with office inventories. Office uses are increasingly encouraged to locate in centres and corridors where intensification is sought and where transit investments can be leveraged.

**Major office employment**

Major office employment (MOE) is comprised of employment accommodated in office buildings greater than 1,900 sq. m (20,000 sq.ft.). Major Office functions are often concentrated in downtown areas or established suburban office parks. Developers can also pursue other sites that complement other existing commercial/retail properties or planned projects. Typically, major office employment includes knowledge-based sectors found in standalone multi-storey buildings including finance and insurance; information and cultural industries;

management of companies; professional, scientific and technical services; and real estate, rental and leasing sectors.

**Major transit station area**

APTG defines major transit station areas (MTSAs) as “the area including and around any existing or planned high order transit station or stop within a settlement area, or the area including and around a major bus depot in an urban core. MTSAs are generally defined as the area within an approximate 500 to 800 metre radius of a transit station, representing a 10 minute walk”.

**Nodes**

Are areas at the intersection of two major roads that are planned for higher-density, mixed uses including residential, employment and a wide range of retail, service, commercial and recreation uses. The Official Plan refers to nodes as commercial mixed-use nodes. The existing commercial mixed-use nodes identified in Guelph’s Official Plan include:

- Clair Road and Gordon Street
- Starwood Drive and Watson Parkway
- Silvercreek Parkway South
- Elmira Road South and Paisley Road
- Woolwich Street and Woodlawn Road

**Non-permanent residents**

Non-permanent residents, as defined by Statistics Canada, are persons from another country who have been legally granted the right to live in Canada on a temporary resident permit along with members of their family living with them. Non-permanent residents include workers and students from other countries and, the humanitarian population such as refugees and other temporary residents.

**Non-settlement area**

Means publicly owned land, which is not identified in the Official Plan for development or redevelopment up to the year 2031 as shown on Schedule 1.

**Primary household maintainer**

As defined by Statistics Canada, the primary household maintainer is the first person in the household identified as someone who pays the rent or the mortgage, or the taxes, or the electricity bill, and so on, for the dwelling.

**Provincially significant employment zones**

Provincially significant employment zones (PSEZ) have been identified by the Province for the purpose of long-term planning for job creation and economic development. PSEZs can consist of employment areas and mixed use areas that

contain a significant number of jobs. There is one PSEZ (Zone # 21) identified in the south end of Guelph and it includes the Hanlon Creek Business Park, the Hanlon Business Park, and the South Guelph Industrial Area.

**Strategic growth areas**

Strategic growth areas are focus areas for accommodating residential intensification and higher-density, mixed uses in a more compact built form. Strategic growth areas may include downtowns, nodes, corridors or other lands along major roads with existing or planned frequent transit.

**Urban growth centre**

APTG identifies several existing or emerging downtowns as urban growth centres (UGC). Guelph's downtown is identified as an urban growth centre. Guelph's urban growth centre is required to be planned to achieve a density of 150 persons and jobs per hectare by 2031.



## 2 Background

This section provides an overview of the provincial policy context that impacts growth management in the City of Guelph and existing municipal policy context for housing growth. It concludes with an outline of the policy gaps that will need to be addressed as part of Shaping Guelph.

### 2.1 Provincial Policy Context

#### 2.1.1 Planning Act

The *Planning Act* is provincial legislation that covers the policies for land use planning affecting communities in Ontario. The *Planning Act* sets out the framework for statutory planning and identifies how land is controlled for municipal land use planning. The *Planning Act* establishes the legislative framework that is further implemented through several other provincial plans including the PPS and APTG.

### 2.1.2 Provincial Policy Statement

The Provincial Policy Statement (PPS 2020) provides direction for municipalities on land use planning. The PPS promotes intensification to sustain healthy, livable communities and to achieve sustainable development patterns, transit solutions and investments and to limit land consumption and inefficient service costs. The PPS provides direction for intensification that accommodates transit-supportive development and a range of housing options.

### 2.1.3 A Place to Grow: Growth Plan for the Greater Golden Horseshoe

A Place to Grow: The Growth Plan for the Greater Golden Horseshoe (APTG) provides direction for managing growth across the Greater Golden Horseshoe (GGH) and provides long term population and employment forecasts that municipalities must plan to achieve. APTG was most recently amended in August 2020 to extend the forecasts to 2051, with 203,000 people and 116,000 jobs identified for the City of Guelph.

Section 2.2.1 of APTG requires that all municipalities undertake integrated planning to establish a hierarchy of settlement areas, and where they should focus growth in built-up area, strategic growth areas, and other locations with existing or planned transit. APTG guides municipalities to plan for population and economic growth while protecting the environment, agricultural lands and any other valuable natural resources. APTG applies a geographic lens to promote growth that builds on community priorities and opportunities.

The following sub-sections describe several specific policy topics within APTG that are relevant to the Housing Analysis and Strategy.

#### Settlement areas

Settlement areas in municipalities include urban areas and rural settlements (such as cities, towns, villages and hamlets) that are built up where development is concentrated and which have a mix of land uses, as well as lands which have been designated in an official plan for development. As per Section 2.2.1 of APTG, settlement areas are to be developed in accordance with the policies of APTG and require that the majority of growth be directed to the settlement areas that have delineated built boundaries, have existing servicing (municipal water and wastewater systems) and can support complete communities. APTG does not permit the establishment of new settlement areas. Section 2.2.8.2 of APTG outlines that a settlement boundary expansion may only occur through a municipal comprehensive review where it is demonstrated that sufficient opportunities to accommodate forecasts growth to 2051 are not available through intensification and in the designated greenfield area based on the minimum intensification and density targets and land needs assessment. APTG outlines a number of additional criteria that must be met in order to support a settlement boundary expansion, where a need has been identified.

**Built-up area**

APTG encourages intensification generally throughout the built-up area, and requires that minimum intensification targets be achieved and strategic growth areas be identified and delineated by municipalities. In accordance with Section 2.2.2 of APTG, the intensification target for the City of Guelph is a minimum of 50% of all annual residential development, to occur in the built-up area of Guelph. The Province delineated the built-up area in the City of Guelph, as the area of development as of 2006.

Municipalities must develop a strategy to support complete communities through appropriate land uses, zoning and design. Strategic growth areas in the BUA are to be delineated and evaluated to identify the appropriate scale and type of development and have density targets established. Municipalities must also prioritize investments in infrastructure, public service facilities, through the implementation of their official plan policies, zoning by-laws, and municipal documents.

**Urban growth centres**

Urban growth centres (UGC) are the primary focus of all intensification and they are primary areas for investment including cultural, recreational, and commercial and entertainment uses. UGCs are intended to accommodate and support transit networks, and provide transit connections to various scales of transportation.

The City of Guelph's downtown is designated as an UGC on Schedule 2 of APTG. Section 2.2.3 states the City of Guelph UGC (Downtown Guelph) will be planned to achieve a minimum density target of 150 residents and jobs combined per hectare by 2031 or earlier.

**Major transit station areas**

Section 2.2.4.3 of APTG notes that major transit station areas (MTSAs) that are on priority transit corridors will be planned to have 150 residents and jobs per hectare for those that are served by the GO Transit rail network. The City must delineate MTSA's and identify a planned density. The Guelph GO Station is not on a priority transit corridor as depicted on Figure 5-1 however is serviced by GO transit. MTSAs are to be planned and designed to be transit supportive, connect to other regional or local modes of transit, achieve multi-modal access and include active transportation infrastructure such as bicycle parking and lanes.

The land surrounding MTSA are to be planned as transit and active-transit supportive, while offering a range and mix of uses and activities. Municipalities must delineate the boundaries of the MTSA in a way that maximizes the size of the area, and transit users that are within walking distance of the station.

**Designated greenfield areas**

Section 2.2.7.2 APTG requires the City of Guelph to plan and achieve a minimum density target of 50 residents and jobs combined per hectare for its designated greenfield areas.

**2.2 Municipal policy context****2.2.1 City of Guelph Official Plan**

The Official Plan for the City of Guelph (Official Plan) was adopted by City Council on November 1, 1994, approved by the Ministry of Municipal Affairs and Housing on December 20, 1995. The Official Plan was first comprehensively updated on December 17, 2001. Since this time, a number of comprehensive Amendments to the Official Plan have been made (OPA 39, OPA 42 and OPA 48) to address conformity with the Growth Plan to the Greater Golden Horseshoe (2006) and consistency with the Provincial Policy Statement (2014). The Plan was most recently consolidated in 2018, and includes all amendments up to Official Plan Amendment 64 (OPA 64), as consolidated through the Ontario Municipal Board Approval of OPA 48.

The Official Plan establishes a vision, guiding principles, strategic goals, objectives and policies to manage future land use patterns; promotes long-term community sustainability; promotes the public interest in the future development of the city; and, guides decision making and community building to the year 2031.

The following sections provide an overview of the urban structure established in the Official Plan and outline any policy gaps that should be addressed through Shaping Guelph. The policy gaps are discussed in Section 2.3 of the Housing Analysis and Strategy.

**Existing urban structure**

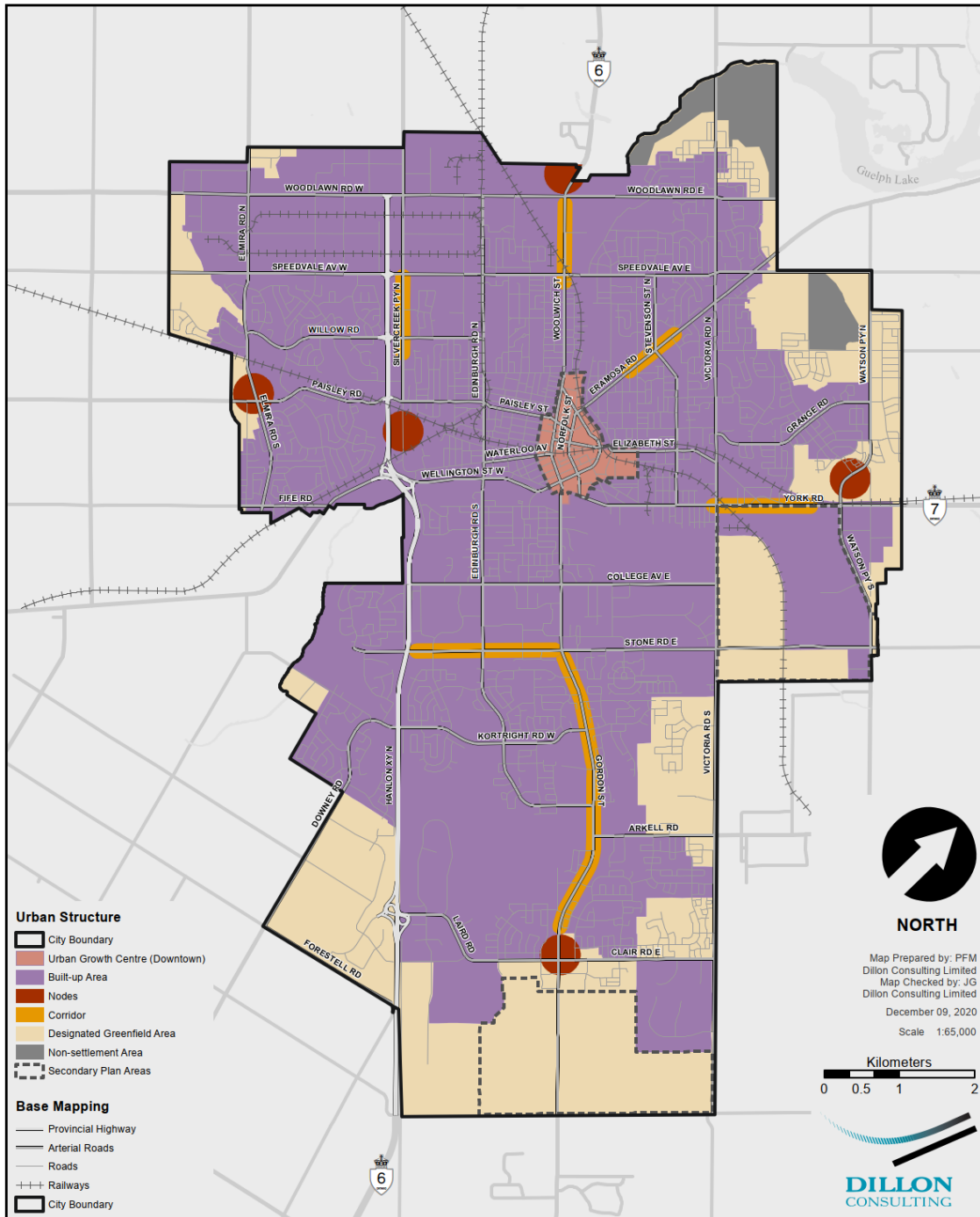
All existing urban structure elements are identified on Schedule 1 and policies found in Section 3 of the Guelph Official Plan, and presented on **Figure 2-1** of the Housing Analysis and Strategy. In accordance with Schedule 1, the urban structure is comprised of the following elements:

- Built-up Area;
- Urban Growth Centre (Downtown Guelph);
- Major Transit Station;
- Intensification Corridors;
- Community Mixed-use Nodes;
- Greenfield Areas; and,
- Non-Settlement Area



The Official Plan establishes an intensification target for the built-up area of 40 per cent by 2015 and each year thereafter; and, a minimum density target of 50 residents and jobs combined per hectare for the entire designated greenfield area. All existing densities in the Official Plan are summarized in **Appendix B**.

**Figure 2-1: Existing Official Plan urban structure**



File Location: G:\GIS\202741 Guelph OP Review\Product\Client\2020\203 Urban Structure\MXD\Figure 1 - Existing Urban Structure.mxd

**Built-up area**

Schedule 1 of the Guelph Official Plan delineates the built-up area (BUA) in accordance with the 2006 Growth Plan. The BUA is fixed in time for the purpose of measuring the density and intensification targets set out in provincial policy. Official Plan policy 3.7.3 establishes the intensification targets for the city, stating the City will promote and facilitate intensification throughout the BUA and that by 2015 and each year thereafter a minimum of 40% of the annual residential development will occur in the BUA. Policies of the Official Plan direct that the City plan and provide for a diverse and compatible mix of land uses within the BUA, including residential and employment uses to support vibrant communities; and, that a range and mix of housing is to be planned that accounts for affordable housing needs and the creation of accessory apartments.

**Urban growth centre – downtown Guelph**

Downtown Guelph is Guelph's UGC and is delineated in Schedule 1 of the Official Plan. Downtown Guelph is being planned to a minimum density target of 150 residents and jobs per hectare by 2031, as directed by the 2006 Growth Plan and the Guelph Official Plan.

The Downtown is subject to a Secondary Plan, integrated as Section 11.1 of the Official Plan. The Secondary Plan provides further detail on how growth is to be achieved across various sectors including residential, commercial and employment growth. The Secondary Plan also promotes re-connection to the Speed River and emphasises the importance of the historic character of the Downtown. The Downtown Secondary Plan identifies policies to guide land use and built form and promote a mix of uses.

**Major transit station area**

Downtown Guelph is identified as a major transit station on Schedule 1. The major transit station area (MTSA) is not currently delineated in the OP.

Policy 3.9 of the OP identifies the Downtown as a MTSA, to support both inter-city transit service and local transit service and function as the central hub providing connections within and outside of the city. The MTSA will generally be planned and designed to achieve increased residential and employment densities that support and ensure the viability of existing and planned transit infrastructure and service; achieve a mix of residential, office, institutional and commercial development; and, provide access from various transportation modes to the transit facility (Policy 3.9.2 i)-iii)).

**Intensification corridors**

There are six intensification corridors within Guelph's urban structure as shown in **Figure 2-1**. They are planned to provide for mixed-use development in proximity to transit services at appropriate locations. The existing intensification corridors include:

- Gordon Street
- Stone Road West
- York Road
- Eramosa Road
- Woolwich Street
- Silvercreek Parkway North

The two largest corridors include the Gordon Street intensification corridor and the Stone Road West intensification corridor. Gordon Street is within the BUA and runs north-south on Gordon Street. The Stone Road West intensification corridor is connected to the Gordon Street intensification corridor. It is also within the BUA and runs along Stone Road West from Gordon Street to the Hanlon Parkway as identified in Schedule 1 of the Official Plan.

In accordance with Policy 3.10.2 i)- iii), all intensification corridors are to be planned to achieve an increased residential and employment densities close to transit, offices, institutional and commercial development, as well as a range of local services.

**Community mixed-use nodes**

Community mixed-use nodes are planned for higher-density mixed-uses that are well served by transit and are pedestrian friendly. They promote walkable complete communities and allow cultural, educational, open space, hotels and live/work studios. Intensification and redevelopment will allow the community mixed-use nodes to evolve through compact built forms. There are currently five community mixed-use nodes indicated on Schedule 1 of the Official Plan which are:

- Clair Road and Gordon Street
- Starwood Drive and Watson Parkway
- Silvercreek Parkway South, south of Paisley Road
- Elmira Road South and Paisley Road
- Woolwich Street and Woodlawn Road

**Designated greenfield areas**

Designated greenfield areas (DGA) of the city are identified on Schedule 1 of the Official Plan. The DGA are part of the settlement area boundary but are outside of the BUA and non-settlement area as delineated on Schedule 1 of the Official Plan.

Policies for development within the greenfield area set out in Section 3.12 of the Official Plan. In accordance with Policy 3.12.1, the DGA will be planned and designed in a manner which contributes to the City's overall vision of a diverse and complete community. Development within the DGA must be compact and occur at densities that support walkable communities, cycling and transit and promote live/work opportunities.

Policy 3.14.6 of the Official Plan states that employment lands within the DGA will be planned to contribute toward the achievement of the overall density target for the DGA over the long term.

Designated Greenfield Areas in the City of Guelph promote neighbourhood scale "urban villages" that are pedestrian friendly, promote energy conservation, and are diverse in their makeup.

The Clair-Maltby Secondary Plan (CMSP) area is entirely within the City's DGA and is the only remaining greenfield area in the city that has not been comprehensively planned. Originally the Rolling Hills subdivision, which is within the city's BUA, was included in the CMSP area. The boundary of the CMSP was amended for the purposes of the secondary plan process to exclude the Rolling Hills subdivision. The completion of a secondary plan for the Clair-Maltby area is a priority for the City and will be incorporated into the Official Plan through an amendment upon completion.

Portions of the Guelph Innovation District (GID) are also within the DGA. Residential and employment lands within the DGA of the GID are to be planned to contribute toward the overall density targets for the DGA of the City over the long term. The DGA of the GID, which includes Block Plan Areas 1, 2 and 3 as shown in Figure A-1, will be planned and designed to achieve an overall minimum density target that is not less than 90 persons and jobs combined per hectare.

### **Non-settlement area**

Non-settlement areas are identified on Schedule 1 and consist of publicly owned lands (Grand River Conservation Authority land in the northeast area of Guelph and the former Eastview landfill site). In accordance with Policy 3.4.1 of the Official Plan, these lands are not identified as being available for urban development and are not included in determining the City's achievement of the DGA density targets.

**Land use plan**

The OP outlines the city's land use plan on Schedule 2. The land use plan implements the urban structure outlined above and includes permitted uses, minimum and maximum building heights and densities for each land use designation. **Appendix A** presents the maximum heights and densities within the existing OP. In addition to these maximum heights and densities, the OP allows for increases beyond the maximum permitted through bonus provisions of the Official Plan. These bonus provisions are outlined in section 10.7.

**2.2.2 Clair-Maltby Secondary Plan**

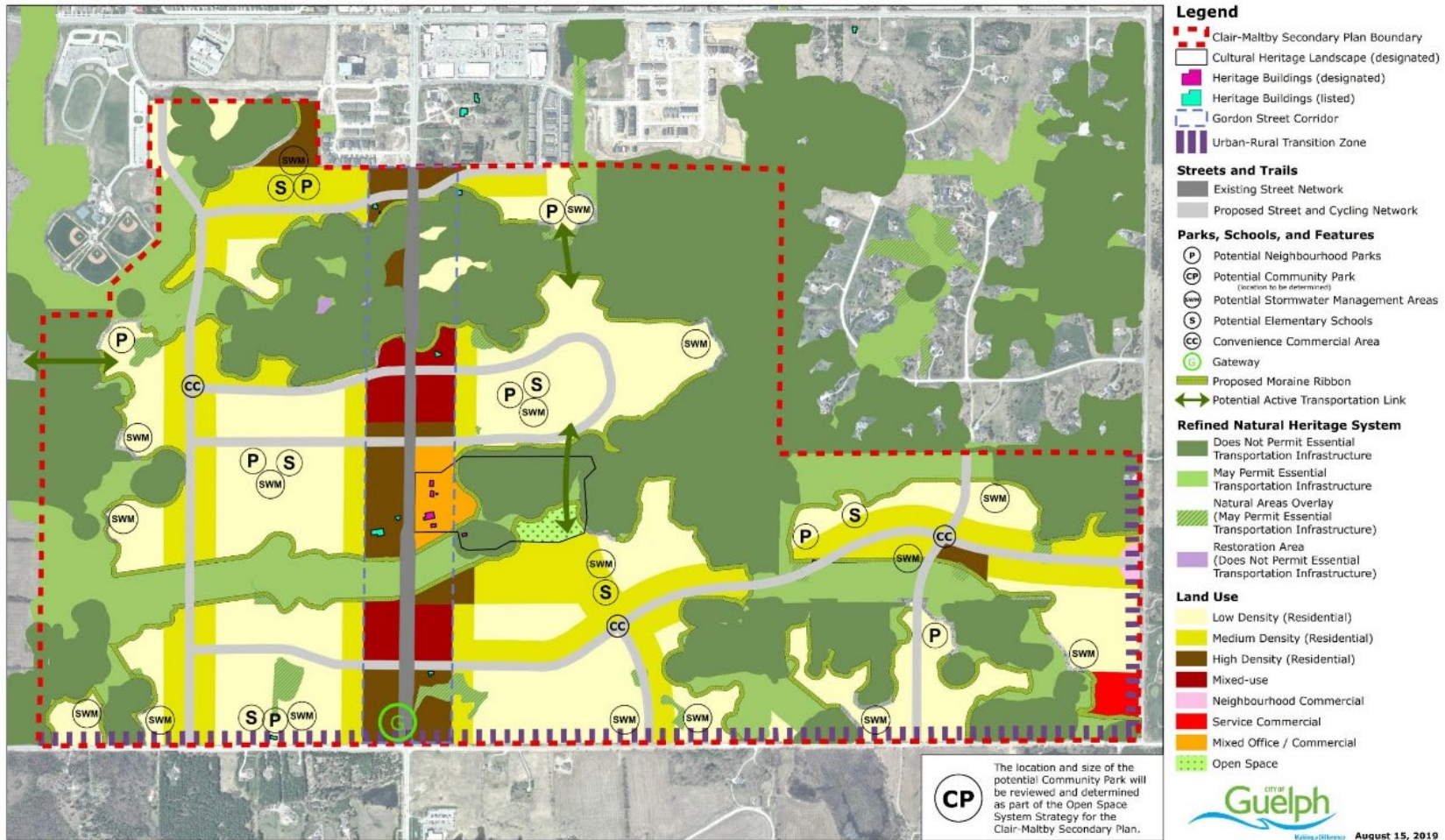
Clair-Maltby is the City's last unplanned DGA. It is located in the south end of the City of Guelph and includes portions of the Paris Galt Moraine. The City has been developing a secondary plan for this area and in May 2019 Council endorsed a preferred community structure for the CMSP (**Figure 2-2**).

Figure 2-2: Clair-Maltby Preferred Community Structure

CITY OF GUELPH OFFICIAL PLAN REVIEW

PREFERRED COMMUNITY STRUCTURE

FIGURE 2-2



### 2.3 Gaps in existing policy framework

The Official Plan is well positioned to conform to the APTG as it outlines an urban structure, recognizes the BUA and DGA and has a growth management strategy that aligns growth with infrastructure planning. In addition to this framework, changes should be made in the OP to conform to the APTG in the following areas:

- **Update the urban structure:** The urban structure should be updated to include a delineated MTSA boundary and identify strategic growth areas which could include a hierarchy of nodes and corridors. Policies should be included to establish 2051 density targets for the UGC, MTSA and other strategic growth areas. An evaluation of the City's existing designated nodes and corridors should be conducted to determine which ones will be a priority for growth to 2051. This will determine how the City will achieve the minimum intensification and density targets to support the achievement of complete communities.
- **Establish a residential intensification target and a DGA density target:** The current OP provides a growth management strategy to achieve the 2006 Growth Plan minimum of 40 per cent residential intensification annually and a density target of 50 people and jobs combined per hectare within DGA (with specific density targets for each employment land use). The intensification target must be updated to conform to APTG requirements to achieve a minimum of 50 per cent residential intensification annually. Additionally, there is the need to update densities for the DGA to ensure conformity with APTG minimum DGA density target of 50 persons and jobs per hectare. Provincial policy no longer allows municipalities to use bonusing to collect community benefit associated with additional height and density, therefore there may be a need to revisit some of the density provisions within the OP land use designation to support the broader intensification and DGA density targets.
- **Delineate and set minimum density targets for strategic growth areas:** The OP currently delineates the Downtown UGC and sets a density target of 150 people and jobs combined by 2031. The MCR should identify a 2051 density target for the Downtown UGC to guide the amount of future growth. In addition to delineating a boundary for Guelph's MTSA, a density target should be identified. The Official Plan will also need to identify, delineate and establish density targets for strategic growth areas.

The gaps in the existing policy framework will be considered in the recommendations and in collaboration with the following demand and supply analysis. The next section reviews the demographic and socio-economic drivers of housing growth in the City.





### 3 Demographic and socio-economic drivers of housing intensification

This section provides an overview of the key demographic and socio-economic factors which are anticipated to influence demand for housing intensification across the City of Guelph to the year 2051, including:

- The changing age structure of the population base and respective housing preferences as well as lifestyle choices of key demographic groups (e.g. Generation Z, Millennials, Generation X and Baby Boomers);
- Trends in housing affordability by structure type;
- Locational attributes and amenities of the City's UGC, intensification corridors and community mixed-use nodes) and the evolution of these areas as priority locations for mixed-use urban development;

- The relationship between local economic growth, increasingly within knowledge-based employment sectors, and demand for housing intensification;
- Anticipated population growth associated with non-permanent residents (NPR) and the anticipated future housing demands associated with these residents by structure type and location;
- Existing hard and soft infrastructure assets, urban amenities, as well as infrastructure investments; and,
- Short-term and longer-term housing supply opportunities to accommodate anticipated demand for housing intensification.

When considering future market demand for housing intensification across the city, it is also important to address development feasibility. Development feasibility in the residential real estate market is typically based on a range of both “hard” cost factors (e.g. tax rates, development charges, land costs, construction costs, utilities) as well as infrastructure and “soft” factors (e.g. transportation connectivity, transit, access to a growing skilled and unskilled labour force pool, housing choice by type and affordability, access to public and private schools). It is important to recognize that “soft” factors are becoming increasingly important as a key determinant in residential development location decisions largely due to changing lifestyle preferences of younger demographic groups. These factors are critical to address when considering the market demand for housing intensification throughout the city because they can impact the feasibility of development forms and types (i.e. high-density<sup>1</sup> versus low-density versus mixed-use) as well as the location of development in one geographic area over another (i.e. DGA vs. BUA).

It is also important to recognize that the residential real estate market is not homogenous through the city. This is largely a result of differences related to the above-mentioned market drivers and the feasibility of residential and mixed-use development by type and location.

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<sup>1</sup> High-density is defined as condominium and rental apartments, including triplexes.

### **3.1 Planning for existing and future generations**

Forecast trends in population age structure are important to address as they directly influence the rate of future population growth as well as future housing needs, infrastructure requirements and community services in the city. The influence of key demographic groups, including Generation Z, Millennials, and Baby Boomers, on future demand within the local real estate markets are particularly important, as these demographic groups represent the largest concentrations of population within the city. As a starting point, it is important to recognize that the future housing demands associated with these broad demographic groups will continue to be driven by a range of socio-economic factors, largely related to the aging of the population, housing affordability, lifestyle choices and the changing nature of work. These factors are briefly discussed below.

### **3.2 Locational attributes, shifting economic trends and increased market appeal for urban living**

As discussed in the Employment Lands Strategy, the city has been competitive in its ability to distinguish itself as a destination for new businesses with a relatively high concentration of a highly skilled labour force pool suited for knowledge-based industries, high quality of life for employers and a competitive development environment.<sup>2</sup> This has helped the City of Guelph in its efforts to connect local companies to a large and growing local talent pool of skilled workers. These workers are particularly attracted to the City in light of growing employment opportunities as well as the urban appeal and amenities associated with the BUA. This is especially the case for younger population segments.

The physical and location attributes of SGAs play a key role in their marketability and suitability for increased levels of intensification. This is particularly relevant in mixed-used environments which integrate office, commercial and residential uses with other community uses and public open spaces.

Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation, while offering office space that has character and is situated in areas with unique amenities. One example is the Guelph Innovation District (GID) which is a planned mixed-use development comprised of residential and non-residential components

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<sup>2</sup> Employment Lands Strategy, Shaping Guelph: Growth Management Strategy, November 27, 2020.

<https://pubguelph.escribemeetings.com/filestream.ashx?DocumentId=11337>

focused on innovation, research and technology <sup>3</sup> This underscores the concept of “place making” as an increasingly recognized and important planning approach to creating diverse and vibrant workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met.

### **3.3 Housing affordability trends within the City of Guelph**

Housing affordability plays a key role in influencing housing demand by structure type. **Figure 3-1** summarizes historical trends in housing sale prices for the City of Guelph and district for single-detached, townhome and owned condominium dwelling units between 2005 and 2020.<sup>4,5</sup> Key observations include:

- During this time period, the average sale price of a single-detached unit has risen from \$260,000 to \$628,000, an increase of 6.5% annually;
- During the same time period, the average sale price of a townhouse rose from \$180,000 to \$439,000, which represents an annual increase of 6.6%; and,
- Condominium units showed the slowest relative increase in price appreciation with an annual price appreciation of 5.8%, from \$165,000 to \$365,000.

This greater relative increase in ground-oriented housing prices (single-detached and townhouses) compared to condominium unit prices has resulted in a greater erosion of housing affordability for low-rise housing forms across the City of Guelph. It is important to recognize, however, that higher-density units, condominium units, are not necessarily the most affordable units in all cases. While condominiums are generally priced relatively lower than ground-oriented housing forms on average, the carrying cost of condominiums can often be higher, most notably when compared to freehold townhomes, when condominium fees and other charges (e.g. parking fees) are factored into the analysis.

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<sup>3</sup> Cushman and Wakefield Real Estate Article, A Tale of Two Markets – Kitchener's Two-Tiered Office Market Solidified as Google Inks Deal for Remainder of Breithaupt Block, published February 7, 2014.

<sup>4</sup> 2020 price is based on October year-to-date data.

<sup>5</sup> The Guelph and District association of Realtors represents Guelph, Drayton, Ariss, Teviotdale, Fergus/Elora, Campbellville and Rockwood.

The average household income growth across the City of Guelph has not kept pace with housing price appreciation over the past several decades. During the past five-year Census period (2011 to 2016), average household incomes increased at an annual rate of 2.6%, which is well below annual housing appreciation rates experienced over this same time period. As a result, housing affordability has been steadily eroded over the past decade across the City of Guelph.

It is also important to note that this erosion of housing affordability across the City of Guelph has not been uniform between home owners and renters. Between 2006 and 2016 the number of homeowners paying more than 30% of their income on housing has increased slightly by 95 households. However, for renters, the number paying more than 30% of their income on housing increased by 1,265 during this same time period, of which 42% were paying unaffordable rents<sup>6,7</sup>

Due to this upward pressure on housing costs and steady reduction in housing affordability, there is a need to ensure that sufficient opportunities exist within the City of Guelph to accommodate a range of housing types and tenures for all income levels, including market, affordable, assisted and emergency housing.<sup>8</sup> The City has set a target of 30 per cent for all newly constructed residential development to be affordable for low and moderate-income households to help address this.<sup>9</sup> The current housing stock in the City of Guelph is heavily weighted towards grade-

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<sup>6</sup> Statistics Canada 2006 and 2016 Census.

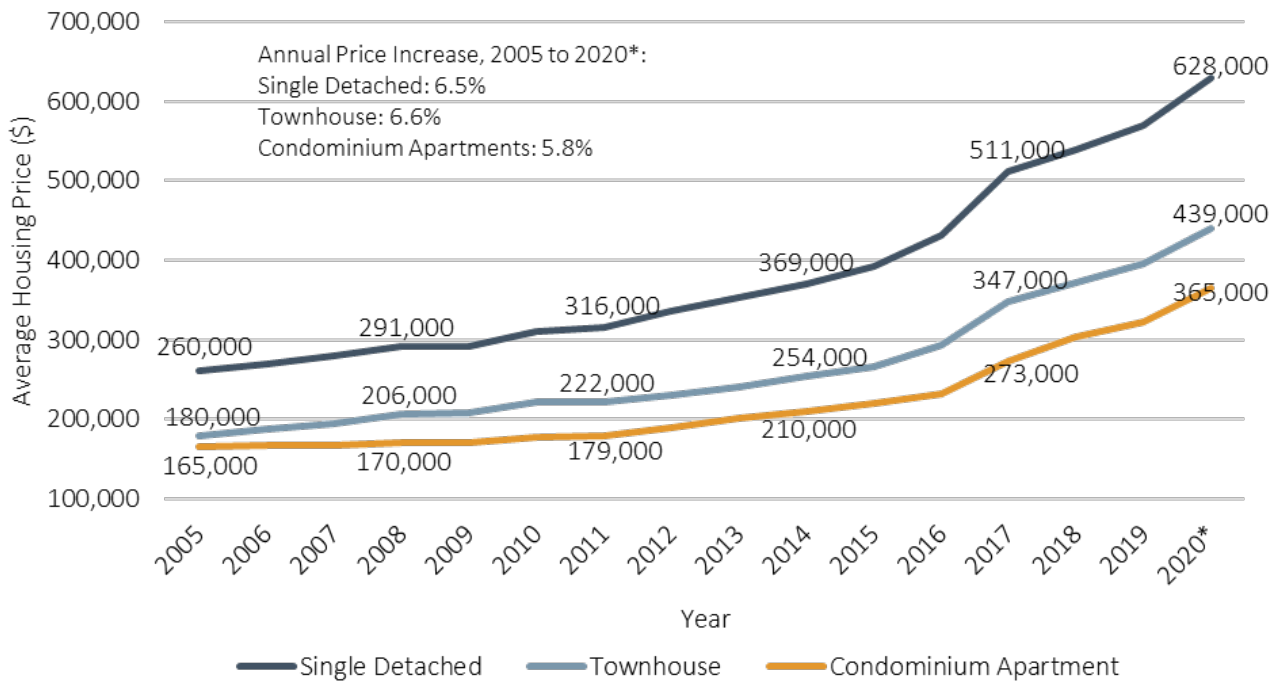
<sup>7</sup> Affordable housing is defined in the PPS as housing with a market price or rent that is affordable to households of low to moderate income, spending no more than 30 percent of their gross income without government subsidies, with sufficient income remaining to meet other daily living needs. The City of Guelph Official Plan, March 2018 Consolidation, defines affordable housing as a) in the case of ownership housing, housing for which the purchase price is at least 10 percent below the average purchase price of a resale unit in the City of Guelph; b) in the case of rental housing, a unit for which the rent is at or below the average market rent of a unit in the City of Guelph.

<sup>8</sup> As defined in the City of Guelph Official Plan, March 2018 Consolidation, 'Assisted', 'subsidized' or 'rent-geared-to income' housing is a sub-set of affordable housing. It refers to housing units provided under a variety of federal and provincial housing program by the municipal non-profit housing corporation and private non-profit and co-operative non-profit housing corporations. Residents in rent-geared-to income units in social housing portfolios pay no more than 30% of their annual gross household income in rent. It also refers to housing units within the private rental sector, where rent-geared-to-income subsidy is provided through a rent supplement agreement to the landlord.

<sup>9</sup> City of Guelph Affordable Housing Strategy, May 8, 2017.

related units, making up 76% of the total housing stock in 2016.<sup>10</sup> To ensure opportunities are available across a broad range of housing types and tenures, a shift is required to offer more high-density housing options. As identified through the housing supply analysis in Section 5, many of the high-density housing opportunities have been identified within both the BUA and DGA.

**Figure 3-1: Guelph and district, growth rate in average price of homes sold, 2005 to 2020**



\*2020 is based on YTD October data.

Note: Figures have been rounded.

Source: Derived from Canadian Real Estate Association MLS Home Price Index data, by Watson & Associates Economists Ltd., 2020.

### 3.4 Planning for non-permanent residents

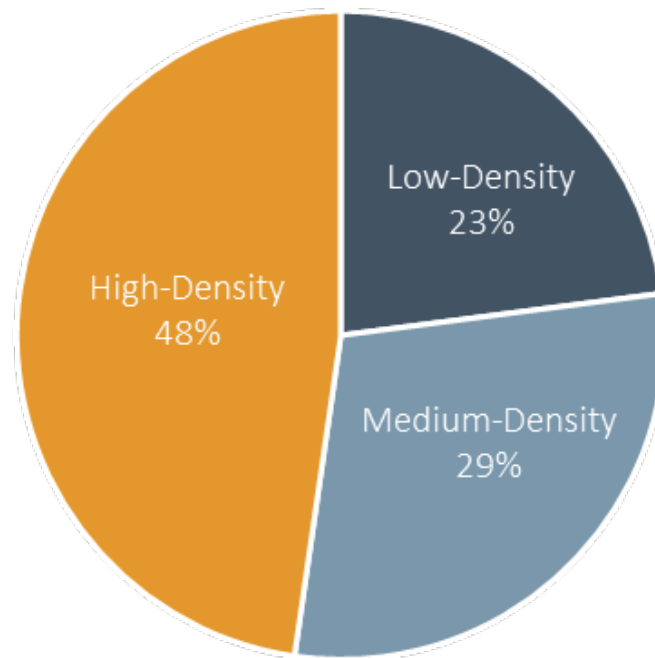
As identified in the Long-Term Population and Growth Analysis Technical Brief, a growing share of the City’s Census population is anticipated to be made up of non-permanent residents (NPR) given the presence of post-secondary institutions and knowledge-based employment opportunities within the City of Guelph. In accordance with 2016 Statistics Canada Census, NPR population represented approximately 1% of the City’s population in 2016, or 1,600 persons. With respect to the age structure, approximately 73% of the NPR population was made up of persons between 15 and 34 years of age as of 2016. This relatively high percentage share of NPR population within the 15-34 age group is anticipated to remain

<sup>10</sup> Based on Statistics Canada 2016 Census data.

relatively consistent over the forecast period, unlike the permanent population base which is forecast to age over time.

**Figure 3-2** summarizes the breakdown of NPR occupied households by dwelling type by primary household maintainer based on 2016 Statistics Canada data. As of 2016, 48 per cent of NPR occupied households were defined as high-density households, followed by medium-density (29 per cent) and low-density (23 per cent). Of the total NPR population in the 15 to 34 age group, 45 per cent of primary household maintainer occupied households were defined as high-density in 2016. Looking forward, housing preferences regarding the NPR population are anticipated to shift further towards high-density forms, largely due to the lack of affordable ground-oriented housing options to accommodate this segment of the population within stable, predominately low-density, residential neighbourhoods within the BUA.

**Figure 3-2: City of Guelph, NPR primary household maintainers by dwelling type, 2016**



Note:

- Low-density includes singles and semis.
- Medium-density includes townhouses and apartments in duplexes.
- High-density includes bachelor, 1-bedroom and 2-bedroom+ apartments.
- Accessory apartments are embedded within the density categories above.

Source: Watson & Associates Economist Ltd., 2020.

Most of the NPR live within the BUA in neighbourhoods which are located in proximity to post-secondary institutions, primarily the University of Guelph. These housing location preferences of the NPR population are anticipated to remain relatively consistent over the long-term 2051 planning horizon.

Over the next several decades, the NPR population within the City of Guelph is forecast to increase significantly from 1,600 in 2016 to 6,800 in 2051, representing an increase of 5,200 or approximately 1 in 8 new residents in the City of Guelph. By 2051, the share of NPR to total Census population is forecast to increase from 1 per cent in 2016 to 3 per cent in 2051. Approximately 40 per cent of the increase in NPR population from 2016 to 2051 is attributed to full-time post-secondary international students. Young working professionals also comprise a significant share of NPR population growth. Given the amount of anticipated growth associated with the NPR population as well as the relatively high propensity of NPR to occupy high-density households within the BUA, this population group is anticipated to be a key driver of both near and longer-term demand for housing intensification.

### **3.5 Future market demand for ground-oriented and high-density housing forms**

The City's active development application data was reviewed to provide insight into the demand for residential units within the BUA and DGA. The data was collected mid 2020 as it is intended to represent a snapshot in time.

Over the past 15 years, as further discussed in Section 4.2, the residential real estate market in the City of Guelph has been transitioning towards high-density development. As of mid-2020 there were (see **Table 3-1**), 5,320 housing units proposed to be built within active residential development applications, including those that have been registered but remain unbuilt, those that have been approved and those that have been draft approved. Of these, 8 per cent single and semi-detached dwelling units, 16 per cent are townhouse dwelling units and 76 per cent are apartment dwelling units.

When considering the distribution of active residential development applications, nearly two thirds (63 per cent) or 3,330 units are in the BUA (see **Table 3-1**). Of the development proposed within the BUA, the majority of the units are apartment units (75 per cent), followed by townhouses (18 per cent) and single and semi-detached units (6 per cent).

The DGA comprises approximately one third of housing units in active residential development applications or 1,990 units. Of the development proposed within the DGA, the majority are also apartment units (78 per cent), followed by townhouses (11 per cent) and single and semi-detached units (11 per cent).



In total, approximately three quarters of all planned housing units in active draft approved and registered residential development applications across the City's BUA and DGA are high-density. This demonstrates a strong demand for higher density built forms across the City.

As previously mentioned, high-density development projects appear to be targeted towards a broad range of demographic groups, including young urban professionals, NPR, empty nesters, seniors and students. The potential housing unit yield associated with the development applications currently active and pace of approvals suggests that demand will continue to remain strong over the next decade, particularly for high-density development.

**Table 3-1: City of Guelph, residential units in the development approvals process**

**Built-up area residential units in development approvals process**

Planning Status	Singles & Semi-Detached	Townhouses	Apartments	Total	Share
Registered Unbuilt <sup>1</sup>	40	185	0	225	<b>7%</b>
Approved <sup>2</sup>	60	270	2,005	2,335	<b>70%</b>
Draft Approved <sup>3</sup>	110	155	510	775	<b>23%</b>
<b>Total</b>	<b>210</b>	<b>610</b>	<b>2,515</b>	<b>3,335</b>	<b>100%</b>
<b>Share</b>	<b>6%</b>	<b>18%</b>	<b>75%</b>	<b>100%</b>	-

**Designated greenfield area residential units in development approvals process**

Planning Status	Singles & Semi-Detached	Townhouses	Apartments	Total	Share
Registered Unbuilt <sup>1</sup>	215	195	320	730	<b>37%</b>
Approved <sup>2</sup>	5	30	1,220	1,255	<b>63%</b>
Draft Approved <sup>3</sup>	5	0	0	5	<b>0%</b>
<b>Total;</b>	<b>225</b>	<b>225</b>	<b>1,540</b>	<b>1,990</b>	<b>100%</b>
<b>Share</b>	<b>11%</b>	<b>11%</b>	<b>78%</b>	<b>100%</b>	-

**Total units in Development Approvals Process**

Planning Status	Singles & Semi-Detached	Townhouses	Apartments	Total	Share
Registered Unbuilt <sup>1</sup>	255	375	320	950	<b>18%</b>
Approved <sup>2</sup>	35	300	3,230	3,565	<b>67%</b>
Draft Approved <sup>3</sup>	115	155	510	780	<b>15%</b>
<b>Total</b>	<b>405</b>	<b>830</b>	<b>4,060</b>	<b>5,295</b>	<b>100%</b>
<b>Share</b>	<b>8%</b>	<b>16%</b>	<b>76%</b>	<b>100%</b>	-

Notes: Figures may not equal totals due to rounding.

<sup>1</sup>Registered Unbuilt: Application has been registered and construction may begin. This category only captures units which have not yet been built.

<sup>2</sup>Approved: Draft approval conditions for an application have been met and a final approval has been issued.

<sup>3</sup>Draft Approved: Application that has been approved subject to conditions that need to be met to obtain final approval.

Source: Derived from City of Guelph data by Watson & Associates Economists Ltd., 2020.



## 4 City of Guelph housing intensification forecast

Section 4 builds on the growth drivers presented in Section 3 and the 2021 City of Guelph Long-Term Population and Housing Growth Analysis Report. Included in this section is:

- A brief review of historical housing and intensification trends;
- A summary of the City of Guelph housing forecast by structure type from 2016 to 2051; and
- A baseline intensification forecast by structure type from 2022 to 2051.

This intensification forecast is based on the following assumptions and targets:

- A Place to Grow: Growth Plan for the Greater Golden Horseshoe 2019 (including Amendment 1), Schedule 3 population and employment forecasts to 2051;
- 50% of annual housing growth from 2022 to 2051 allocated within the City of Guelph BUA; and,
- Density Target of 66 people and jobs per hectare in the City's Designated Greenfield Areas (DGA).

## 4.1 City of Guelph historical housing trends, 2006 to 2019

### 4.1.1 Historical high-density housing demand

Over the past two decades, the residential market in the City of Guelph has been transitioning towards high-density development. As illustrated Figure 4-1, the share of housing units associated with high-density building permit activity in the City of Guelph increased from 18% of building permits issued from 2006 to 2010 period, to 35% from 2011 to 2015 and to 49% from 2016 to 2019.

**Table 4-1: City of Guelph, High-Density Housing Growth as Share of Total Housing Growth from Building Permit Activity, 2006 to 2019**

Period Building Permits Were Issued	High-Density Total Housing Growth	Total Housing Growth	High-Density Annual Housing Growth	Total Annual Housing Growth	High-Density Share of Total Housing Growth
<b>2006 to 2010</b>	885	4,660	175	930	18%
<b>2011 to 2015</b>	1,750	5,025	350	1,005	35%
<b>2016 to 2019</b>	2,080	4,255	520	1,065	49%

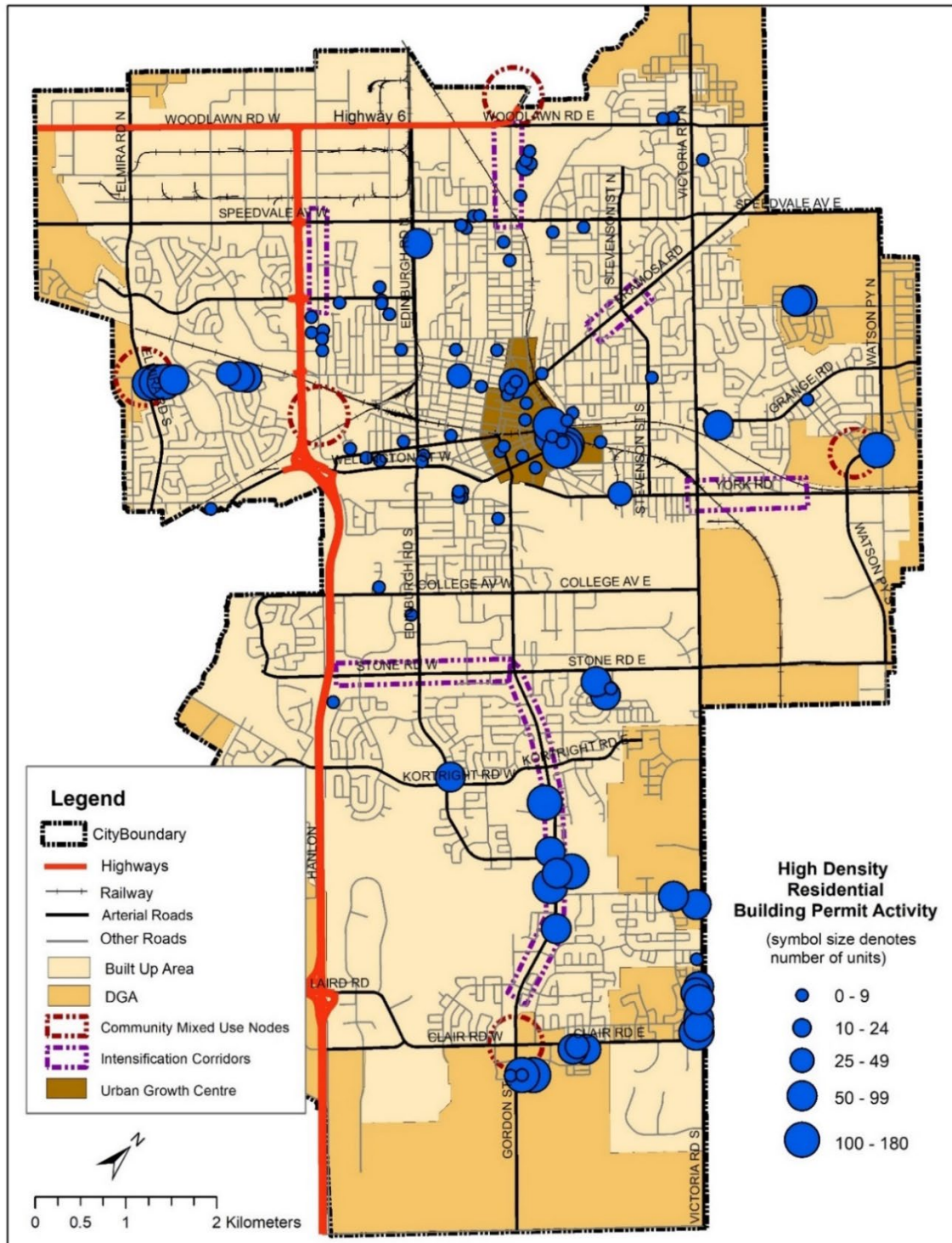
Note: Figures may not equal totals due to rounding.

Source: 2006 to 2019 derived from City of Guelph building permit data and Guelph Growth Management and Affordable Housing Monitoring Report, 2019, by Watson & Associates Economists Ltd., 2020.

The majority of high-density development in the City of Guelph has occurred within the BUA. **Figure 4-1** spatially illustrates the location of high-density housing activity during this period. Key observations include:

- High-density development within the BUA comprised 67% of City-wide high-density development from 2009 to 2019;
- Within the BUA, high-density development activity has largely clustered within and directly surrounding the UGC and SGAs (intensification corridors and community mixed-use nodes);
- Development is also occurring in areas served by higher order transit such (i.e. MTSA within the UGC), highways and arterial roads; and
- A share of high-density development has recently occurred in proximity to the University of Guelph in the above mentioned areas within the BUA.

Figure 4-1: City of Guelph, Historical High-Density Housing Growth, 2009 to 2019



Note: High-density includes apartment and condominium buildings for the purposes of this map.

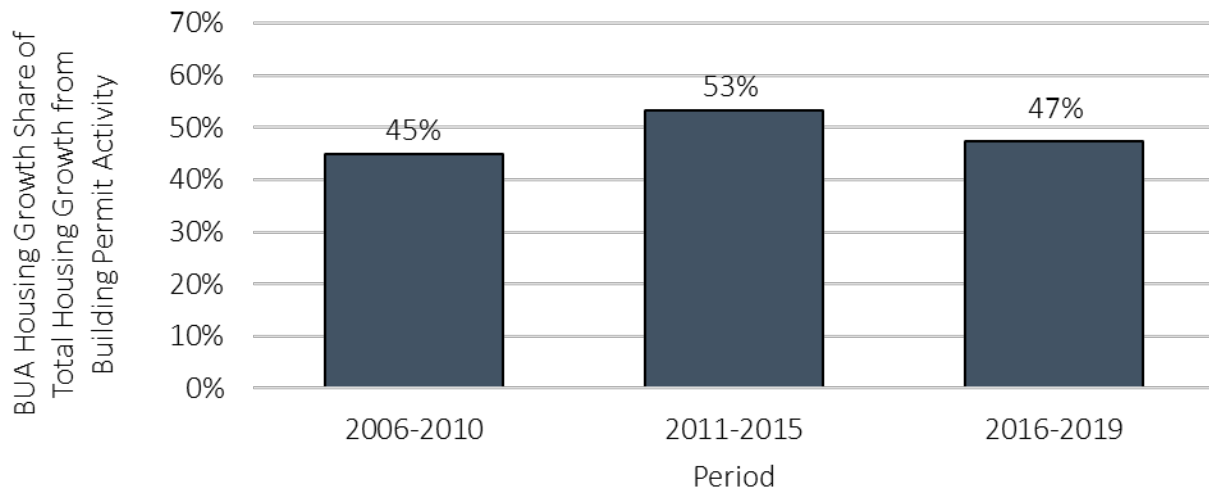
### 4.1.2 Historical intensification

**Figure 4-2** summarizes annual intensification in the City of Guelph from 2006 to 2010, 2011 to 2015 and 2016 to 2019. **Figure 4-3** summarizes the changing intensification trends for high-density housing within the City of Guelph during the same time periods. Key observations are as follows:

- Intensification has historically accounted for approximately 49% of housing growth from 2006 to 2019 with the share increasing from 45% over the 2006 to 2010 period to 51% from 2011 to 2019;
- The rate of intensification has been meeting or exceeding the OP minimum annual housing intensification target of 40% for the majority of years between 2006 and 2019. Since 2011, the intensification rate has been trending at or close to the 50% target prescribed by APTG;
- While the share of total growth in the BUA has been relatively stable over the 2006 to 2019 period, development activity in the BUA has been transitioning to high-density housing forms. This is largely due to a diminishing supply of land in the BUA with limited ground-oriented development opportunities combined with strengthening market demand for high-density housing within this area; and,
- The share of high-density development within the BUA accounted for 22% of City-wide growth from 2006 to 2019. The share has increased from 12% over the 2006 to 2010, to 29% over the 2011 to 2015 period and to 26% from 2016 to 2019.

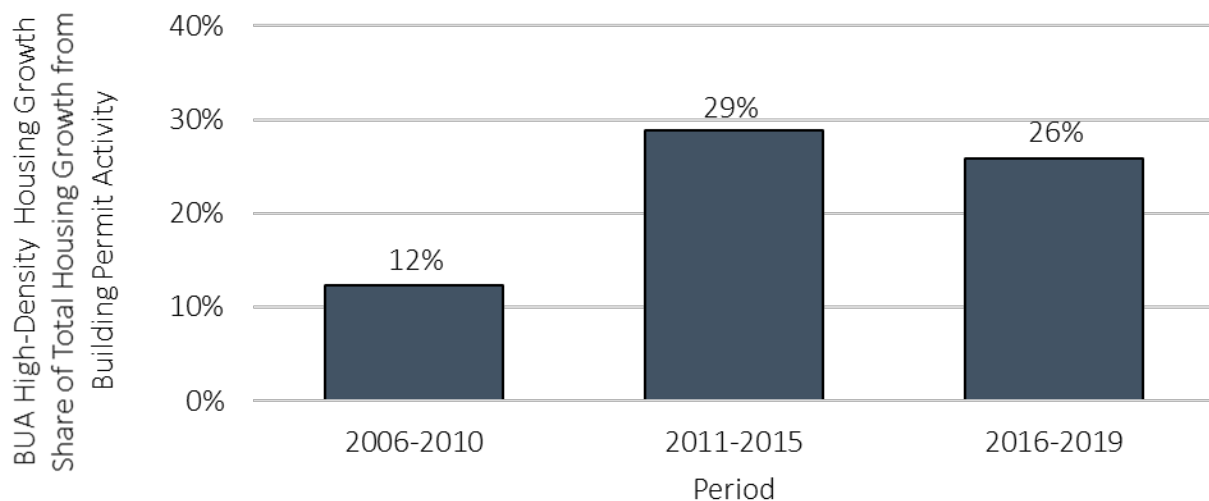


**Figure 4-2: City of Guelph, Historical intensification from building permit activity, 2006 to 2019**



Source: Derived from City of Guelph building permit data and Guelph Growth Management and Affordable Housing Monitoring Report 2019, by Watson & Associates Economists Ltd., 2020.

**Figure 4-3: City of Guelph, historical percentage of new high-density housing development within the BUA as a share of total housing growth from building permit activity, 2006 to 2019**



Note: High-density housing does not include accessory apartments.

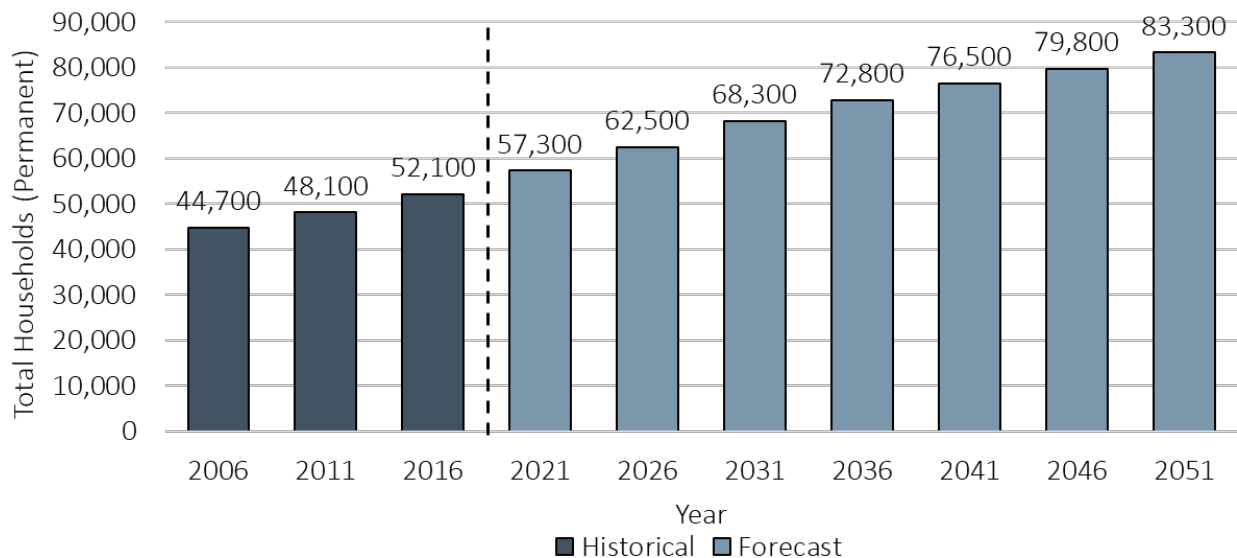
Source: Derived from City of Guelph building permit data and Guelph Growth Management and Affordable Housing Monitoring Report 2019, by Watson & Associates Economists Ltd., 2020.

## 4.2 City of Guelph housing forecast by structure type, 2016 to 2051

### 4.2.1 Total census housing forecast

As identified in the City of Guelph Long-Term Population and Growth Analysis Technical Brief, the City's Census housing base is forecast to reach approximately 68,300 total households by 2031, 76,500 by 2041 and 83,300 by 2051, as illustrated in **Figure 4-4**.

**Figure 4-4: City of Guelph, Census housing forecast, 2016 to 2051**



Note: Figures have been rounded.

Source: 2001 to 2016 based on Statistics Canada Census and 2016 to 2051 forecast by Watson & Associates Economists Ltd., 2020.

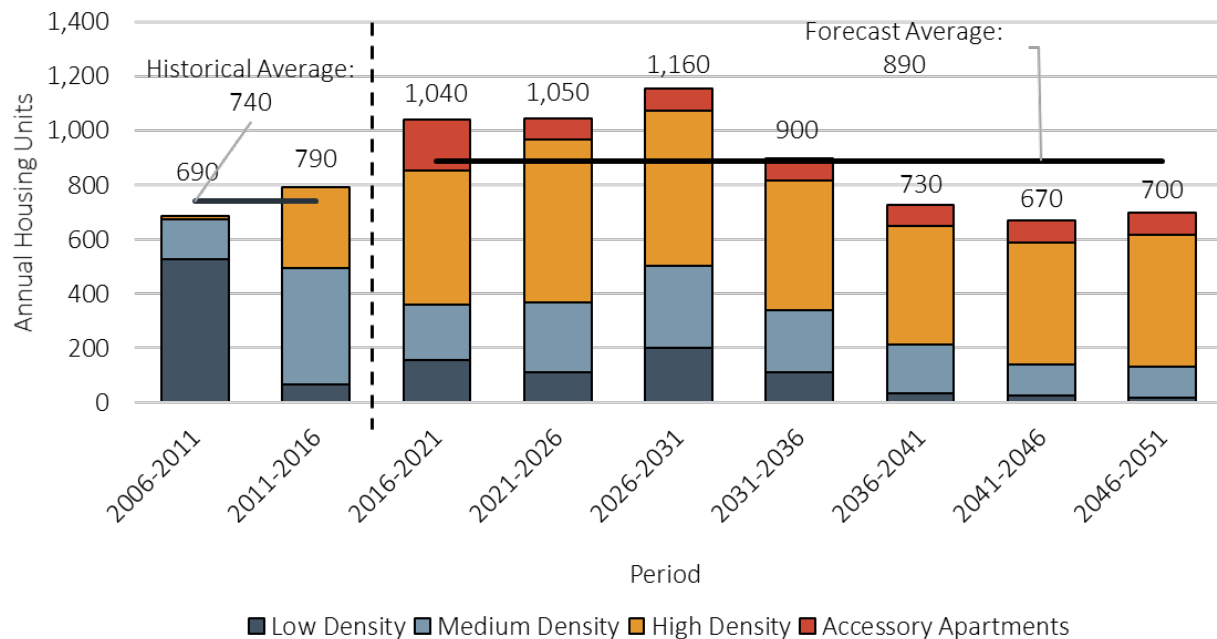
### 4.2.2 Census housing forecast by structure type

As previously noted, the City of Guelph housing forecast by structure type has been developed based on an average DGA density target of 66 people and jobs per hectare and 50% housing intensification between 2022 and 2051. **Figure 4-5** summarizes the City of Guelph Census housing forecast by structure type (i.e. low-density, medium-density, high-density and accessory apartments) over the 2016 to 2051 forecast period in five-year growth increments. For comparative purposes, historical housing growth by structure type is also provided for the period between 2006 and 2016. Key observations include:

- In accordance with residential housing trends from 2016 to 2019, as well as the anticipated demographic and socio-economic drivers discussed in Section 5, housing growth over the 2016 to 2021 period is anticipated to be increasingly oriented to high-density housing forms;

- Planning policy and new infrastructure investments will also influence this shift towards high-density development, particularly within the UGC, SGAs and along arterial roads; and,
- Forecast housing demand from 2016 to 2051 consists of 10% low-density housing, 22% medium-density housing, 56% high-density housing and 11% accessory apartment units, with an increasing shift towards high-density occurring during the 35 year forecast period.

**Figure 4-5: City of Guelph, annual Census housing forecast by structure type, 2016 to 2051**



Note:

- Low Density includes singles and semis.
- Medium density includes townhouses and apartments in duplexes.
- High Density includes bachelor, 1-bedroom and 2-bedroom + apartments (excludes accessory apartments)
- Accessory apartments are embedded in the Census data provided between 2006 to 2016.
- Figures have been rounded.

Source: 2006 to 2016 derived from Statistics Canada 2006 to 2016 Census data. 2016 to 2051 forecast by Watson & Associates Economist Ltd., 2020.

### 4.3 City of Guelph housing intensification forecast, 2022 to 2051

Building on the demographic and socio-economic drivers identified in Section 5, **Table 4-2**, **Table 4-3** and **Figure 6-6** summarize the City of Guelph housing intensification forecast. Key results of the forecast are as follows:

- The BUA is forecast to accommodate an additional approximately 12,500 households and 22,500 people over the 2022 to 2051 period;
- The intensification forecast is comparable to the historical share of housing intensification constructed within the BUA (49%) from 2006 to 2019;
- It is important to note that the absolute amount of housing growth required to achieve a 50% intensification rate from 2022 to 2051 is higher than Census housing growth which occurred during the 2006 to 2016 period. Achieving a 50% intensification target would require a 16% increase in the absolute level of annual housing growth in the BUA between 2022 to 2051, relative to the 2006 to 2016 period. This translates to an annual BUA forecast of 430 households between 2022 to 2051 compared to 370 annual households between 2006 and 2016.<sup>11 12</sup>
- High-density housing units are anticipated to comprise an increasing share of intensification by housing structure type over the 2022 to 2051 forecast period; and,
- In accordance with the growth drivers identified in Section 5, the City of Guelph is anticipated to continue to accommodate a high share of housing intensification.

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<sup>11</sup> The 2006 to 2016 period references housing growth from the 2006 to 2016 Statistics Canada Census, and not units from building permit activity. 370 annual units within the BUA is what would be required to achieve 50% intensification based on Census housing growth.

<sup>12</sup> It is also important to note that building permit activity within the BUA was higher than actual housing growth associated with Statistics Canada Census data for comparable historical time periods. This is important to note when using comparing historical residential building permit activity over the past decade with forecast housing intensification potential.

**Table 4-2: City of Guelph, BUA population and housing growth forecast (intensification), 2022 to 2051**

Year	Population (Including Census Undercount) <sup>1</sup>	Low-Density <sup>2</sup> Households	Medium-Density <sup>3</sup> Households	High-Density <sup>4</sup> Households	Total Households	Persons Per Unit (PPU)
2016	120,210	26,240	8,895	11,560	46,700	2.57
2022	127,955	27,265	9,205	13,380	49,850	2.57
2051	150,480	29,285	10,505	22,525	62,320	2.41
<b>2022-2051</b>	<b>22,525</b>	<b>2,020</b>	<b>1,300</b>	<b>9,145</b>	<b>12,470</b>	<b>1.81</b>

<sup>1</sup> Population includes net Census undercount of 3.4%.

<sup>2</sup> Low-density households in 2016 include singles and semis based on 2016 Statistics Canada Census data. 2016 accessory apartments are embedded within the Census housing categories. 2022 and 2051 is based on growth from 2016 to 2051 which includes singles, semis and accessory apartments.

<sup>3</sup> Medium-density includes townhouses and apartments in duplexes.

<sup>4</sup> High-density includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Note: Accessory apartments are embedded in the household categories above. Figures may not equal totals due to rounding.

Source: 2016 Derived from Statistics Canada Census and 2022 to 2051 forecast by Watson & Associates Economists Ltd., 2020.

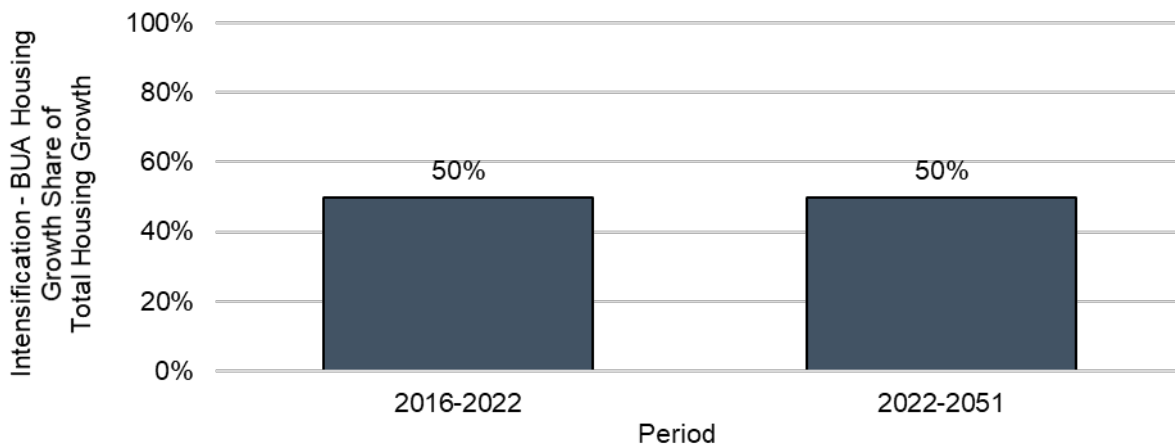
**Table 4-3: City of Guelph, BUA annual incremental housing forecast (intensification), 2022 to 2051**

<b>Description Reference</b>	<b>Description</b>	<b>2016-2022</b>	<b>2022-2051</b>
(A)	Annual High-Density Housing Growth Within the BUA	305	315
(B)	Annual Housing Growth Within the BUA	525	430
(C)	Annual Total Housing Growth	1,045	860
(A/C)	High-Density Housing Growth in BUA Share of Total Housing Growth	29%	37%
(B/C)	Intensification – Housing Growth in BUA Share of Total Housing Growth	50%	50%

Note: Accessory apartments are captured as ground-oriented housing from 2016 to 2051. Figures have been rounded

Source: Watson & Associates Economists Ltd., 2020.

**Figure 4-6: City of Guelph, BUA housing forecast percentage share (intensification), 2022 to 2051, scenario 1 - base case**

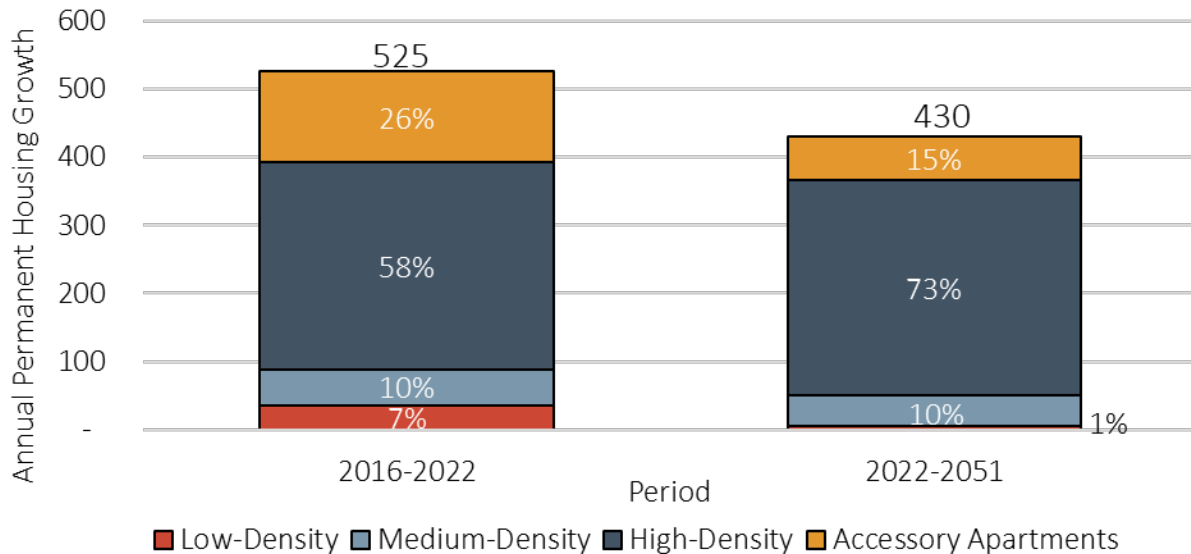


Source: Watson & Associates Economists Ltd., 2020.

**Figure 4-7** illustrates the intensification forecast by housing structure type. Key observations are as follows:

- Within the BUA an annual average of 430 new households are forecast to be added over the 2022 to 2051 forecast period;
- As opportunities for ground-oriented housing in the BUA diminish, the BUA is anticipated to accommodate an increasing share of high-density housing demand. High-density housing is forecast to comprise a growing share of housing intensification, accounting for 73% (315 annual units) of housing growth from 2022 to 2051; and
- It is noted that annual housing intensification shares may vary from 50% over the forecast period as influenced by market demand, the timing of development approvals, timing between construction and occupancy and the timing of large-scale development projects within the DGA.

**Figure 4-7: City of Guelph, BUA annual permanent housing forecast by structure type (intensification), 2022 to 2051**



Note:

- Low-density includes singles and semis.
- Medium-density includes townhouses and apartments in duplexes.
- High-density includes bachelor, 1-bedroom and 2-bedroom + apartments (excludes accessory apartments)

Source: Watson & Associates Economist Ltd., 2020.

## 4.4 Summary

In accordance with the total amount of housing growth anticipated for the City of Guelph to the year 2051 as well as the identified demographic and socio-economic drivers of housing intensification discussed herein, achieving 50% intensification from 2022 to 2051 appears to be a reasonable and achievable target from a residential real estate market perspective. In recent years, demand for housing in intensification areas has been strengthening, reaching 51% of total City-wide housing growth from building permit activity over the 2011 to 2019 period, driven by a shift towards high-density housing. The market drivers discussed herein suggest that this shift will continue over the 2022 to 2051 forecast period as market demand within the BUA, primarily for high-density housing, continues to strengthen.

It is important to recognize that the intensification target is a ratio which is directly tied to total housing growth. When considering future housing demand within the BUA it is important to consider both the 50% intensification ratio as well as the amount of absolute housing demand anticipated within the BUA. When considering absolute housing growth, achieving a 50% intensification target would require a 16% increase in annual housing growth in the BUA between 2022 to 2051, relative to 50% of total Census housing growth from 2006 to 2016. This translates to an



annual BUA forecast of 430 households from 2022 to 2051. It should also be noted that historically from 2006 to 2010 a considerable portion of housing units from building permit activity within the BUA was ground-oriented (approximately 73%), however that share has been steadily declining to 45% over the 2011 to 2019 period. Looking forward, limited opportunities are anticipated to be available for ground-oriented housing within the BUA. These considerations suggest that higher alternative housing intensification targets may be somewhat difficult to achieve from a market perspective.

Achieving a higher residential intensification target would also most likely require a further shift away from new ground-oriented housing construction towards high-density housing. While the demographic and socio-economic trends outlined in Section 3 support a steady shift in forecast housing growth towards high-density housing forms, the City of will also need to provide housing options for families including a broad range of new ground-oriented housing forms. Ultimately, these objectives will need to be balanced to ensure that the City is well-positioned to accommodate the long-term population growth identified through APTG across all population segments by age and income.

Based on the demand for intensification, the following section considers the proposed urban structure and supply within.

## 5 Land supply and intensification opportunities

As presented in Section 2.3, and Chapter 2 more broadly, the City has a well-defined urban structure, and as part of this Growth Management Strategy, will need to evaluate and update certain elements to align with provincial policy and the City's long term vision and principles for growth. The capacity for growth within the existing urban structure elements has been examined in order to assess the ability for the City to accommodate the growth forecast outlined in section 4. The urban structure elements that were analysed in the capacity analysis for the City of Guelph is presented on **Figure 5-1** and includes the following:

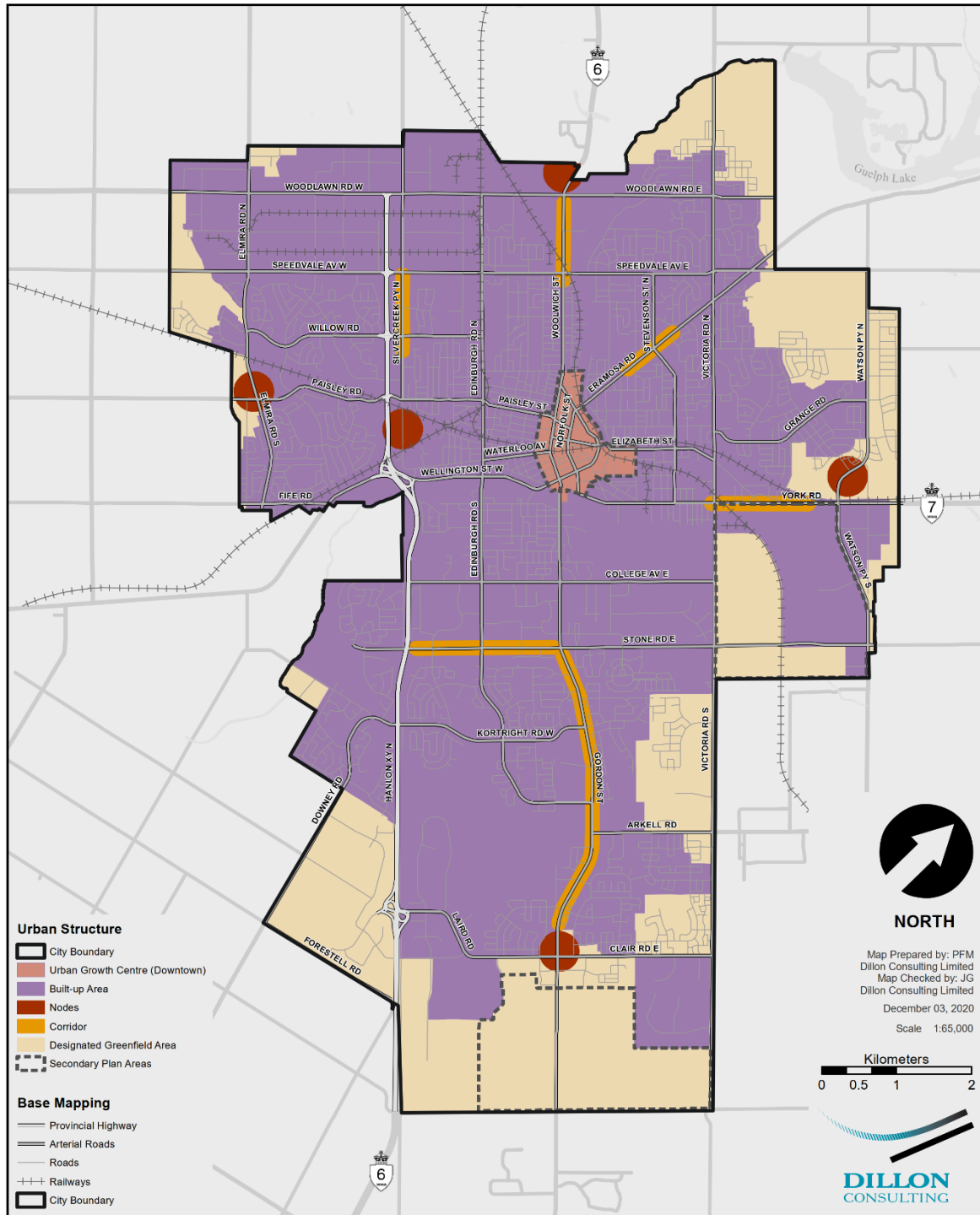
### Settlement Area Boundary

- Built Up Area
  - Community Areas (Residential growth within these areas is considered intensification)
    - Downtown Urban Growth Centre
    - Guelph GO Major Transit Station Area
    - Community Mixed Use Nodes
    - Intensification Corridors
    - Rest of the Built-up Area
  - Employment Areas
- Designated Greenfield Area
  - Community Areas
  - Employment Areas
- Non-Settlement Area

The Growth Management Strategy will examine a number of Alternative Growth Scenarios and recommend a Preferred Growth Scenario that will guide growth within the City to 2051. As part of this next step, refinements to the urban structure may be proposed.

The following sub-sections outline the location, function, capacity analysis and scale associated with each component of the City's Urban Structure. The content of this section is intended to provide the policy framework and background rationale in support of this framework to guide the City's new Urban Structure policies.

Figure 5-1: Guelph's urban structure elements



File Location: G:\GIS\2022\41 Guelph OP Review\Product\Client\2020\1203 Urban Structure\MXD\Figure 1 - Existing Urban Structure.mxd

## 5.1 Built-up area

### 5.1.1 Location

The Built-up Area defines the limits of the developed urban areas as of 2006, as defined by the province. The Built-up Area of the City of Guelph is depicted on **Figure 5-1**.

### 5.1.2 Function

Lands that make up the BUA are intended to be the focus of growth within settlement areas, which is to be achieved through intensification at a rate of 50% annually in accordance with APTG.

### 5.1.3 Capacity analysis

In order to test whether there is sufficient capacity within the existing urban structure and planning framework to accommodate the growth, the Residential Intensification Analysis evaluated lands within the built-up area to determine where there was the physical capacity to accommodate growth (as summarized in **Appendix A**), and then the maximum permitted building heights and densities from the OP (as presented in **Appendix B**) were applied as well as the planned densities for the Downtown Urban Growth Centre (UGC) and Guelph Innovation District (GID) Secondary Plans (for the portion of GID within the Built-up Area) to determine the range of additional residential units that could be physically accommodated. The methodology for determining the capacity of additional residential units is further described in **Appendix C**. The capacity for growth within the BUA has been examined in order to assess the ability of the BUA to accommodate growth (intensification) over the long term. The capacity analysis, shown in **Table 5-1**, is based on the planned growth identified in the Secondary Plans (for the Downtown and portion of Guelph Innovation District that is within the BUA), the City's Residential Intensification Analysis with maximum densities from the OP or maximum density assumptions established where there were none in the OP applied to identified parcels that have opportunities for intensification. Growth assumptions associated with additional residential dwelling units were also considered<sup>13</sup>.

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<sup>13</sup> Based on 2016 Census Data, there are 26,485 single detached houses, 2,410 semi-detached houses and 7,255 row houses in the City. Historically, 6 per cent of existing single detached houses and semi-detached houses have an additional residential dwelling unit. An assumption of 7.5 per cent of single detached houses and semi-detached houses having an additional residential dwelling unit was applied as well as an assumption of 1.67 people per unit (PPU) based on apartment type from Watson's DC Study, April 2018

**Table 5-1: Capacity for growth within the City's built-up area**

Location within the built-up area	Capacity for population growth	Estimated capacity for residential units <sup>14</sup>	Capacity for employment growth
Downtown UGC	11,740	5,108	1,890
Guelph Innovation District (portion within the BUA)	No Data	No Data	260
Community Mixed-Use Nodes	5,010	2,180	6,530
Intensification Corridors	7,625	3,318	4,325
Rest of the built-up Area	52,445	22,822	10,920
Additional residential dwelling units	3,620	1,575	-
<b>Total Growth in Built-up Area</b>	<b>80,440</b>	<b>35,004</b>	<b>23,920</b>

There are a number of opportunities for growth in population (people) and employment (jobs) within the City's built-up area. A potential build out scenario with the assumption that every identified parcel is redeveloped to the maximum permitted density, the City's built-up area could accommodate up to 80,000 additional people, or 35,000 additional residential units, and just under 24,000 additional jobs.

The largest portion, or 65 per cent of the capacity for residential growth and over 45 per cent of the employment growth, has been identified in areas outside of existing designated nodes, corridors, and the UGC. These include clusters of low, medium and high density residential sites and neighbourhood commercial lands across the municipality that could physically accommodate additional growth<sup>15</sup>. The Official Plan currently provides for a number of opportunities for gentle

<sup>14</sup> Unit count based on Watson 2018 DC Background Study Schedule A6 which assigns a city-wide weighted PPU average of 2.298

<sup>15</sup> Please refer to the Residential Intensification Analysis in **Appendix A** for an overview of the methodology used and a summary of the areas identified with intensification potential.

intensification<sup>16</sup> throughout the built-up area that are outside of designated nodes, corridors and the downtown, however in most cases these are occupied sites that would require redevelopment/infill and may have site-level constraints that have not been assessed as part of this analysis.

The second largest opportunity for residential growth was identified within the Downtown UGC, followed by designated intensification corridors and community mixed use nodes. In order to realize this intensification potential, lot consolidation and redevelopment of existing low density occupied sites is required in the Downtown UGC, intensification corridors and community mixed use nodes.

Based on the housing intensification forecast presented in Section 4.3 of the Housing Analysis and Strategy, there is sufficient physical capacity for growth within the built-up area based on the current land use framework to accommodate the City's intensification needs to 2051 (based on the Growth Plan minimum intensification rate of 50% of residential growth). However, this capacity analysis is based on an aggressive build out scenario that requires privately owned and existing occupied sites be redeveloped or infill added to achieve maximum permitted uses. This capacity analysis assumes a full build out of land to the maximum densities permitted in the Official Plan without taking into consideration any site or development constraints. In addition, it would require a change to the non-residential built form, from the current ground-oriented, low density buildings to higher densities in order to achieve the targeted intensification.

#### 5.1.4 **Target**

APTG requires that a minimum of 50 per cent of all residential development occurring annually within the City to 2051 be achieved through intensification within the built-up area. The capacity analysis outlines sufficient capacity within the built-up area to accommodate this growth<sup>17</sup>. Alternative intensification targets above the minimum APTG target may be explored through Shaping Guelph. Through the local growth management strategy and preferred growth scenario an intensification target will be recommended.

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<sup>16</sup> Gentle intensification is a term used to describe development or redevelopment of sites across the BUA to accommodate duplexes, triplexes, multi-unit residential, townhouses and low-rise apartments.

<sup>17</sup> Municipal infrastructure analysis has not been undertaken to date to determine if the growth presented here within can be accommodated within the existing municipal water and wastewater capacity.

## 5.2 Urban growth centre

### 5.2.1 Location

The City of Guelph has one Urban Growth Centre (UGC), Downtown Guelph, as presented on **Figure 5-1**.

### 5.2.2 Function

The UGC is the City's primary focal point for accommodating population and employment growth, serving as a meeting place, location for cultural facilities, public institutions, and major services and transit hubs. The UGC is the primary focus area for intensification within the City and should accommodate and support both inter- and intra-regional transit; attract a range of significant employment uses at a provincial national or international level; and, accommodate significant population and employment growth.

### 5.2.3 Capacity analysis

According to the OP, by 2031 or earlier, the UGC will be planned to achieve a minimum density target of 150 residents and jobs per hectare. The UGC is 120 hectares in size and, had an existing density of 96 people and jobs per hectare in 2006.

The UGC plays a significant role in accommodating growth in the City given its proximity to existing and planned transit services and ability to accommodate a wide range of uses and built forms. The Downtown Secondary Plan (DSP) (section 11.1 of the OP) provides detailed policies for the downtown, including land use and built form. A detailed capacity analysis was undertaken as part of the preparation of the DSP, and the model build out of the detailed land use identified a capacity for over 11,000 additional people and over 1,800 additional jobs. This would result in an overall density for the UGC of 209 people and jobs per hectare at full build out of the Downtown Secondary Plan.

### 5.2.4 Target

Based on the capacity for growth and analysis, the recommended density target for the UGC is 200 people and jobs combined per hectare by 2051. Planning for the density of 200 people and jobs combined per hectare would support the City's ability to achieve the intensification target and support the role and function of the UGC in the city's urban structure.

## 5.3 Major transit station area

### 5.3.1 Location

Guelph Central Station, located at 79 Carden Street, is served by GO train, VIA and Guelph Transit, and Greyhound. Guelph Central Station is identified as a major transit station in the Official Plan and the Downtown is identified as the major transit station area (MTSA). The station, a 500 meter and 800 meter radius and the UGC boundary are depicted on **Figure 5-1**. The proposed MTSA boundary is consistent with the extent of the Downtown UGC.

### 5.3.2 Function

MTSAs are to be planned and designed to be transit-supportive and to achieve multimodal access to stations. They are connected to other nearby major trip generators, such as the infrastructure for active transportation (e.g. bike lanes, sidewalks) and commuter pick-up and drop-off areas. MTSAs are to be planned and developed to accommodate a significant portion of future intensification and redevelopment and achieve a diverse mix of uses, including affordable housing and secondary units, to support existing and planned transit levels. Stable residential areas may also be a part of the MTSAs in various, low density forms. Development is intended to foster joint development projects between the public and private sectors and prohibit land uses and built forms that would adversely affect the achievement of transit supportive densities. The development of major offices and other appropriate major institutional uses will be directed to MTSAs.

### 5.3.3 Target

Given the overlapping boundaries with the UGC, the recommended density target for the MTSA is the same as the UGC.

## 5.4 Designated nodes and corridors

### 5.4.1 Location

The Guelph OP does not currently identify other strategic growth areas, however it does designate a number of community mixed-use nodes and intensification corridors, which depicted on **Figure 5-1**. The Official Plan identifies the following as nodes and corridors in the built-up area:

#### Community mixed-use nodes

- Clair Road and Gordon Street
- Starwood Drive and Watson Parkway
- Silvercreek Parkway South
- Elmira Road South and Paisley Road



- Woolwich Street and Woodlawn Road

**Intensification corridors**

- Gordon Street: generally from Stone Road E to Claire Road E.
- Stone Road West: generally from Hanlon Pkwy to Gordon St.
- York Road: generally from Victoria Rd N to the rail corridor.
- Eramosa Road: generally from Glenhill Pl to west of Meyer Dr.
- Woolwich Street: generally from Ann St to Woodlawn Rd E.
- Silvercreek Parkway North: generally from south of Willow Rd to Speedsvalle Ave W.

**5.4.2 Function**

The community mixed-use nodes are intended to be planned for higher density mixed-uses, with a range of residential, commercial, employment and amenities. The Community Mixed-Use Nodes are intended to be an area of focus for intensification and redevelopment in a compact built-form and planned by the Official Plan.

The intensification corridors are intended grow to include a range of mixed-use development with close proximity to transit services. The areas are to be planned by the Official Plan to increase residential and employment densities to support planned and existing transit services. The development and intensification should be planned around the arterial and collector road systems in the City.

**5.4.3 Capacity analysis**

The community mixed-use node and intensification corridors designations are an overlay designation in the Guelph OP. There are a little under 60 hectares of land that are currently identified as community mixed-use nodes and these lands have an existing density, on average, of 25 people and jobs per hectare. There is just under 200 hectares of land identified as intensification corridors across the city, with an existing density of, on average, 32 people and jobs per hectare. The community mixed-use nodes and intensification corridors have a fair bit of physical capacity, meaning the existing site is not for development and redevelopment over the long term.

Based on the city's Residential Intensification Analysis, a number of sites within the nodes and corridors have opportunities to accommodate intensification over the long term. Based on this build out scenario of maximum permitted heights and densities within each of the land uses, there is a potential capacity for an additional 5,000 people and 6,500 jobs within the community mixed-use nodes and another 10,400 people and just under 7,900 jobs within the intensification corridors. If this growth was realized, this would account for an average density of over 220 people and jobs combined per hectare for intensification lands identified within the

community mixed-use nodes and 92 people and jobs per hectare for intensification lands identified within the intensification corridors.

#### **5.4.4 Target**

The Growth Management Strategy will review the existing designated nodes and corridors and may recommend modifications to the City's urban structure including a hierarchy of nodes and corridors and a connected network that supports higher order transit investment. The Recommended Urban Structure will also include recommended density targets for any identified nodes and corridors.

**Table 5-2: Existing and estimated capacity of people and jobs within nodes and corridors in the built-up area**

Location within the built-up area	Lands with opportunities for intensification (ha)	Existing people	Existing jobs	Existing density (people + jobs/ha)	Estimated total capacity of people	Estimated total capacity of jobs	Growth in People	Growth in Jobs
Community mixed-use nodes	58.70	216	1,247	25	5,228	7,778	5,012	6,531
Intensification Corridors	199.10	2,800	3,549	32	10,425	7,873	7,624	4,324

## 5.5 Designated greenfield area

### 5.5.1 Location

The designated greenfield area is comprised of lands located within the settlement area but outside of the delineated built-up area. The City's designated greenfield areas are depicted on **Figure 5-1**.

### 5.5.2 Function

Lands that form the designated greenfield area are intended to accommodate forecasted growth to 2051. Development taking place in designated greenfield areas is required to support the achievement of complete communities, active transportation and integration and sustained viability of transit success.

### 5.5.3 Capacity analysis

The designated greenfield area includes 2263 hectares of land, of which:

- 176 hectares are non-settlement;
- 1498 hectares are community area; and,
- 590 hectares are employment area<sup>18</sup>.

Of these lands, approximately 47 per cent are developed, 4 per cent are committed, that is unbuilt approved or registered lands part of a development application, and the remaining 49 per cent are vacant. The existing developed land has an average density of 52 people and jobs per hectare.

Based on the planned density within the Guelph Innovation District Secondary Plan and the endorsed preferred community structure for the Clair-Maltby Secondary Plan, and assuming the remaining vacant designated greenfield lands outside of these areas is planned to achieve a minimum density target of 50 people and jobs per hectare, the City's designated greenfield area could accommodate an average of 66 people and jobs per hectare at build out. Further detail will be included in the Land Need Analysis with information on the capacity of the City's DGA.

### 5.5.4 Target

The City is required to plan to achieve a minimum density target for the entire designated greenfield area of 50 residents and jobs combined per hectare. Given that significant land use planning effort has done into preparing secondary plans for the majority of the DGA, the designated greenfield area target should be modified to reflect the planned density as outlined in approved/endorsed secondary plans.

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<sup>18</sup> This includes the Employment Areas being recommended for conversion, please refer to the Employment Lands Strategy for further details.

## 5.6 Employment areas

### 5.6.1 Location

The proposed urban structure is inclusive of the entirety of the City. Therefore, employment areas are included in the proposed urban structure. Employment areas include all lands within the urban area that are designated within the Official Plan that are designed for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, associated retail, and ancillary facilities. Many of the employment areas are located near major goods movement facilities and corridors, including major highway interchanges. The City's employment areas are depicted on **Figure 5-1**.

### 5.6.2 Function

Employment areas are clusters of business and economic activities designed for manufacturing, warehousing, offices and associated and ancillary facilities. These areas are to be protected for employment uses over the long term. Within these areas, residential uses and other sensitive land uses are prohibited. Major retail uses are also prohibited.

### 5.6.3 Target

As per the Employment Lands Strategy, an overall employment density target of a minimum of 40 jobs per hectare should be established to reflect both the City's long term planning policy objectives for its employment areas as well as anticipated market trends for these areas over the long term<sup>19</sup>. In addition, minimum density targets for individual employment land use designations can be effective in supporting increased density on employment lands. The following density targets are recommended for employment areas within the BUA and DGA:

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<sup>19</sup> This is a blended average to account for 30 jobs per gross hectare (35 jobs per net hectare) on employment lands outside of the Guelph Innovation District (GID) and 77 jobs per gross ha (90 jobs per net ha) on the GID employment lands.

- Industrial, 35 jobs per hectare;
- Institutional/Research Park, 50 jobs per hectare; and,
- Corporate Business Park, 70 jobs per hectare.

While the Mixed Business lands are not recommended as part of an employment area, the City may choose to include a density target for these lands going forward (e.g. 35 people and jobs per hectare). The Employment Mixed Use 1 and 2 designations in the GID were recommended to be included as part of the City's Employment Areas in the Employment Land Strategy.

## **5.7 Provincially significant employment zones**

### **5.7.1 Location**

Provincially significant employment zones (PSEZs) are areas defined by the Province for the purpose of long-term planning for job creation and economic development. The Province has identified a PSEZ in Guelph, which is depicted on **Figure 5-1**.

### **5.7.2 Function**

PSEZs, as noted above, are established by the Province, and represent strategically located areas of high economic output that provide stable, reliable employment. The Province may also provide specific direction for planning PSEZs to be implemented through appropriate Official Plan policies and designations and economic development strategies. These areas are protected from conversion outside of a city-initiated comprehensive Official Plan review.

### **5.7.3 Target**

PSEZs contribute to the overall employment density of the City and are subject to minimum employment density targets for employment areas. Please refer to the Employment Area density targets noted in Section 5.6.3 above for recommended density targets for Guelph's PSEZ.



## 6 Recommendations and next steps

### 6.1 Preliminary policy directions

The following summarizes the results and preliminary and recommended policy directions from the Housing Analysis and Strategy.

- I. **There appears to be sufficient supply within the built-up area to accommodate the APTG minimum intensification target:** Based on the minimum APTG intensification target and forecast presented in Section 4.3, the City would need to accommodate an additional 12,500 units (or 22,500 people) within the built-up area to 2051. The supply analysis presented in Section 5.1.3 demonstrates a capacity for an additional 35,000 residential units based on intensification of a number of sites at maximum permitted densities based on the existing OP. While the municipal infrastructure analysis has not been undertaken to date to determine if this growth can be accommodated within the existing municipal water and wastewater capacity, from a physical land use perspective based on the current urban structure

and maximum density policies of the OP, there is sufficient supply to meet the minimum intensification target.

- II. **Establish an urban growth centre (UGC) density target for 2051:** The City has delineated the UGC and established land use policies to support a density target of 150 people and jobs to 2031 in the current OP. The City should establish a UGC density target for 2051 to conform to the APTG and because the UGC is a priority area for growth within the City. The recommended density target for the Downtown UGC is 200 people and jobs per hectare by 2051, based on the Secondary Plan model density and its role in the City's urban structure.
- III. **Delineate Guelph's major transit station area (MTSA) and define its function in City's urban structure:** The MTSA should be clearly delineated in the City's urban structure and the policies should facilitate the function of the area to have increased transit ridership, connectivity, and a mix of uses to support existing and future transit investment. The proposed MTSA boundary is consistent with the extent of the Downtown UGC for the reasons noted in Section 5.3 of the Housing Analysis and Strategy. The recommended density target for the MTSA is the same as the UGC.
- IV. **Update designated greenfield area (DGA) density target:** The City is required to plan to achieve a minimum density target for the entire designated greenfield area of 50 residents and jobs combined per hectare. The Secondary Plans within the DGA and remaining vacant DGA lands are anticipated to achieve an average density of 66 people and jobs per hectare. Given that significant land use planning effort has done into preparing secondary plans for the majority of the DGA, the designated greenfield area target should be modified to reflect the planned density as outlined in approved/endorsed secondary plans.
- V. **Identify strategic growth areas and establish a hierarchy of nodes and corridors with density targets:** The City's current urban structure includes community mixed-use nodes and intensification corridors. These have a well-defined role in the urban structure, but will need to be evaluated to determine if they are a strategic growth areas. In order to support the preferred Growth Scenario, each of the existing designated nodes and corridors should be evaluated to determine if they should be included as part of the City's Strategic Growth Areas. In addition, this evaluation should consider potential new nodes and corridors that would support the City's long term vision and principles for growth, and create a connected network that could support higher order transit investment. Given the significant capacity for intensification across the Built-Up Area, a hierarchy of nodes and corridors should be explored to help prioritize growth and investment (with associated density targets to guide intensification). Finally, given that significant detailed land use planning has been undertaken for the



Designated Greenfield Areas, the nodes and corridors analysis should evaluate potential new nodes and corridors within the DGA.

- VI. **Promote intensification more broadly throughout the built-up area:**  
The Residential Intensification Analysis identified significant opportunities for intensification broadly throughout the built-up area outside of existing nodes, corridors and the UGC. It is recognized that residential intensification in lower density residential neighbourhoods is particularly challenging, due to a number of market, public perception and policy factors. Notwithstanding these challenges, limited residential intensification oriented toward grade-related housing forms within lower density residential areas, where appropriate, could support the city's objectives to provide a broader range of housing choice including affordable housing opportunities. It is recommended that the OP define a framework that facilitates gentle intensification across the built-up area and revisits lands designated Low Density Residential on arterial and collector roads to consider opportunities for intensification.
- VII. **Review maximum heights and densities within land use designations:**  
The City's current OP has a number of policies which permit heights and densities that are above the existing development built form. A number of the land use designations identify that the City may accept height and density bonusing above the maximum densities identified. Given this tool is no longer available to municipalities within the Planning Act, the maximum heights and densities within these land use designations should be revisited to ensure they permit.

## 6.2 Next steps

The Housing Analysis Strategy informs a number of variables that will be further explored through the Growth Scenarios analysis. The next step in this study is to prepare the Growth Scenarios Technical Brief, which will examine alternative growth scenarios and recommend an evaluation framework to select the Preferred Growth Scenario. Several factors have been identified through the context of the Housing Analysis Strategy that can be examined further as part of the development of alternative growth scenarios. These include:

- a. Pace of growth within the Built-up Area
- b. Pace of growth within the Designated Greenfield Area
- c. Where growth is directed within the Built-up Area
- d. A different mix of housing
- e. A different density for employment lands

Please refer to Growth Scenarios document for further information.

# Appendix A

## Residential intensification analysis



**Shaping** Guelph

# **Shaping Guelph: Growth Management Strategy**

Residential intensification analysis  
September 2020

[guelph.ca/shapingguelph](http://guelph.ca/shapingguelph)

CITY OF  
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Making a Difference

## **Residential intensification analysis**

### **Purpose**

The Residential Intensification Analysis (RIA) identifies opportunities for additional residential units within Guelph's built-up area. This is one of the first steps in developing an updated Growth Management Strategy for Guelph to the horizon of A Place to Grow: Growth Plan for the Greater Golden Horseshoe (APTG). Guelph's Growth Management Strategy will outline where and how the city should accommodate its forecast growth to the horizon of APTG and a strategy to manage this growth.

The results of this analysis will be used to inform the Housing Analysis and Strategy (HAS). It is through the HAS and growth scenario work that:

- The projected household and population growth within areas identified as an opportunity for intensification will be determined
- Recommendations on areas that should be strategic growth areas or other areas for residential intensification will be made, and
- Recommend strategies for accommodating forecast growth to the horizon of APTG will be identified

### **Overview of A Place to Grow: Growth Plan for the Greater Golden Horseshoe 2019**

A Place to Grow: Growth Plan for the Greater Golden Horseshoe (2019) (APTG) is Ontario's plan for growth and development within the greater golden horseshoe, a plan which supports economic prosperity, protects the environment, and helps communities achieve a high quality of life. Guelph is required to plan for a minimum population of 203,000 people in 2051. APTG also requires that Guelph plan for the following related to residential intensification:

- A minimum residential intensification target of 50 per cent within the built-up area<sup>20</sup>
- A minimum Urban Growth Centre<sup>21</sup> (Downtown) density of 150 persons and jobs per hectare to 2031
- Delineate the boundary of Guelph's major transit station area (MTSA) and consideration of a minimum density target

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<sup>20</sup> APTG defines built up area as "the limits of the developed urban area as defined by the Minister in consultation with affected municipalities for the purpose of measuring the minimum intensification target". The limits of the built-up area were established by the Province in 2006

<sup>21</sup> APTG defines urban growth centres as "existing or emerging downtown areas shown in the Growth Plan and as further identified by the Minister on April 2, 2008".

## **Appendix A**

- Establish an updated urban structure, including the delineation of strategic growth areas<sup>22</sup> (formerly intensification areas)
- Identify the appropriate type and scale of development in strategic growth areas, and
- Continue to integrate land use planning with infrastructure planning.

APTG requires that municipalities develop a strategy to achieve the minimum intensification target and intensification generally throughout the built-up area. This strategy must identify strategic growth areas and recognize that they are a key focus for development. For each strategic growth area, appropriate types and scale of development and how they transition to surrounding areas must be identified. In addition to strategic growth areas, intensification shall be encouraged throughout the built-up area.

## **Guelph's 2007 residential intensification methodology**

In 2007, the city developed a methodology to assess its capacity and opportunities for residential intensification. This was done as part of the city's municipal comprehensive Official Plan review to conform to the 2006 Provincial Growth Plan. This methodology included:

- Review of existing lot fabric to suggest low, medium, and high density areas for connection and expansion
- Review of consents from the previous 15 years to determine where change is occurring in established neighbourhoods
- Mapping of lots with a depth of 40 meters or more to understand lot patterns. Lots that were determined to be unsuitable for intensification were removed
- Consideration of nodes, corridors, and downtown principles
- Opportunities of brownfields, greyfields, and identified areas of renewal from community improvement plans
- Opportunities of known apartment and townhouse lots which remained undeveloped
- Transit routes and major roads

In addition to the criteria used to identify opportunities for residential intensification, the following were considered as constraints:

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<sup>22</sup> APTG defines strategic growth areas as "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".

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- Environmental features based on Official Plan land use designations
- Stable neighbourhoods based on severance activity and heritage lot fabric
- Hydro and rail corridors and identified road widenings
- Servicing capacity
- Transportation network capacity
- Adjacent land uses, such as employment areas
- Age of development – sites that were newer than 20 years old were not considered for redevelopment

Once the opportunities and constraints were identified, staff critically analyzed the results based on recent developments and long-range policy viewpoints. The number of additional units for each area was identified based on existing zoning permitted densities and units per hectare assumptions. The capacity for each area to accommodate commercial was factored in.

## Methodology for identifying opportunities for residential intensification

Building on the city's methodology for identifying opportunities for residential intensification from 2007, the following methodology was used to identify opportunities for residential intensification within the city's built-up area. The methodology for identifying opportunities for residential intensification contained two stages:

- **Stage 1 - identifying capacity for residential intensification** – Through this stage, sites that have the capacity to add more residential units were identified. To identify which sites have capacity to add more residential units, a series of criteria were developed which were then divided into primary and secondary criteria. This stage answered the question "can the site physically accommodate more residential units?"
- **Stage 2 - identifying opportunities for residential intensification** – Through this stage, sites that have capacity for more residential units were further reviewed and excluded based on additional criteria. This additional criteria included the site's intended use in a plan of subdivision and age of existing development on the site. Sites that remained were sites that had opportunities for residential intensification. In some cases sites may provide an opportunity for intensification but may be identified as being a lower priority site. This stage answered the question "is it appropriate for this site to accommodate more residential units?"

The results of the RIA will be considered as part of the development of the HAS and growth scenarios to determine the residential unit potential throughout the built-up area.

This methodology aligns with the guidance provided in APTG for strategic growth areas and the Provincial Land Needs Assessment Methodology.

# Stage 1 - Identifying capacity for residential intensification

The criteria for identifying capacity for residential intensification is divided into primary and secondary criteria. Each lot in the built-up area of the city was assessed according to the primary criteria. The secondary criteria was used to prioritize lots that met primary criteria. A set of exclusion criteria is also included which was applied to lots that met primary criteria. A capacity for residential intensification for the downtown Guelph (the urban growth centre) was conducted as part of the development of the Downtown Secondary Plan. This capacity analysis was reviewed and determined to be consistent with the approach outlined here. The downtown capacity analysis will be used as an input into the HAS and growth scenario work.

## Primary criteria

### 1. Lot fabric

#### Minimum lot width and lot depth

To determine the minimum lot width needed for capacity to accommodate additional residential units, the minimum lot width regulations from the existing medium density residential zones (excluding the zones that only permit on-street townhouse dwellings) in the existing zoning bylaw as well as preliminary recommendations from the comprehensive zoning bylaw review discussion paper (October 2019) was used. Specialized zones and minor variances approved for recent development applications at medium and high densities was also considered. Using recent development applications allowed for consideration of current trends in minimum lot widths that may be larger or smaller than the current zoning bylaw requirements. Through this analysis it was determined that the minimum lot width appropriate for adding additional residential units was 30 meters.

To determine a minimum lot depth, recent approved development applications for both townhouses and apartments was considered. There is no minimum lot depth regulation in the zoning bylaw, nor is one recommended through the comprehensive zoning bylaw review discussion paper. Through this analysis it was determined that the minimum lot depth appropriate for adding additional units was 40 meters.

All lots in Guelph's built-up area were evaluated to determine whether they met this minimum lot width and minimum lot depth. Lots that didn't meet the minimum threshold for lot width and lot depth may still present opportunities for residential intensification should they be consolidated. Should, through the HAS, it be determined that there is not an adequate supply of lands to accommodate growth to achieve the minimum built-up area intensification level, opportunities for lot consolidation may be considered.

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### Challenges

The following challenges were identified for this criteria:

- Older parcel data may have been challenging to find and was not be spatially reliable. Parcel rectification has been an ongoing process which has corrected property shapes and sizes, and in some cases, parcel lot lines were 10s of meters from their actual location
- Lot depth can only be calculated by using the length of the edges of the lot, or by dividing lot area by lot frontage. For some irregular lots, neither of these methods produce an accurate calculation of lot depth. For this reason, lot depth was an approximation
- Lot frontage on corner lots was challenging to calculate accurately.

**The size of a lot is paramount when examining capacity for residential intensification. As such, only lots that met the criteria above were further evaluated against the criteria below.**

2. **Vacant lots** – Vacant lots are lots that currently have no buildings on them. These lots were identified as having capacity for residential intensification. Vacant lot records are maintained as part of the city’s growth management data. An update of the city’s vacant lot records was assessed against the Municipal Property Assessment Corporation’s (MPAC) records and the city’s tax records. Vacant lot records were compared with the city’s active development application list and any lots that were part of an active development application were removed from the vacant lot inventory. Finally, a comparison of the city’s demolition records were reviewed against the vacant lot records to ensure that any lots that have had a demolition that have created a vacant lot are included in the vacant lot inventory.

### Challenges

The accuracy of MPAC data was questionable requiring additional verification.

3. **Underutilized lots** – Underutilized lots include those that are not currently at the maximum permitted residential floor space index (density) or lot coverage, in accordance with the Official Plan or zoning bylaw. Any lots which are underutilized were identified as having capacity for residential intensification. There were several things that were considered to determine whether a lot was underutilized. These were:
  - MPAC’s condition and quality ratings for residential structures. MPAC uses a grading system from 1 to 10 to identify the quality of construction where 1 represents an inexpensive structure to a 10 which is a structure built with to the highest quality. A grading of 6 represents a common construction standard and is considered the benchmark. In addition to quality ratings, MPAC also rates the physical condition of residential structures in relation to



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their age. This rating system assigns a “grade” of poor, fair, average, good, or excellent

- MPAC excess tax classes which identifies properties that have a portion of land that has no buildings but is not completely vacant
- Properties with low lot coverage. Properties with existing/proposed townhouses and/or apartments were reviewed to determine their actual lot coverage. The average and median lot coverages were calculated. To determine low lot coverage, lots that had less than 50 per cent of the median lot coverage were considered as properties with low lot coverage. That is lots with less than approximately 17 per cent lot coverage for lots with townhouses and lots with less than approximately 17.25 per cent lot coverage for lots with apartments were considered
- Sites with existing residential permissions which have not yet built out
- Sites that have residential permissions according to their Official Plan lands uses but do not currently contain residential uses

### Challenges

The following challenges were identified for this criteria:

- Underutilized commercial sites were difficult to analyze because MPAC’s records did not include detailed records for non-residential buildings or mixed-use buildings,
- The completeness and accuracy of city records used for identifying the existing use of sites

#### 4. Current Official Plan land use designation

The current Official Plan land use designation of all lots was assessed. If the lot was designated:

- **Significant Natural Areas and Natural Areas** – The purpose of this land use designation is to protect the city’s natural heritage features and areas. Lands and portions of lands with this land use designation were excluded from the residential capacity analysis
- **Open Space and Parks** – The purpose of this land use designation is to provide public and private space for active or passive recreational activities, conservation management, and other open space uses. Lots and portions of lots with this land use designation were excluded from the residential capacity analysis
- **Major Utility** – The purpose of this land use designation is to recognize utility uses that are operated by or for the city that serve a city-wide function. Lots and portions of lots with this land use designation were excluded from the residential capacity analysis
- **Major Institutional** – The purpose of this land use designation is to recognize and allow for large-scale institutional uses such as the

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- University of Guelph and the hospital. Lots and portions of lots with this land use designation were excluded from the residential capacity analysis
- **Institutional/Research Park** – The purpose of this land use designation is to recognize specific lands that are owned by the University of Guelph (generally in the vicinity of Stone Road from Edinburgh Road to Gordon Street) that are used for major institutional, research and commercial activities. Lots and portions of lots with this land use designation, that are not currently used for residential purposes, were excluded from the residential capacity analysis

**Industrial, Corporate Business Park, and Mixed Business** – The purpose of these land use designations is to provide an adequate supply of lands to accommodate current and future job growth. These lands are currently the city’s employment land base and only employment (such as industrial and office) and employment related uses are permitted. Other uses are only permitted through Official Plan amendments, and in some circumstances, only through the city’s Municipal Comprehensive Official Plan review (MCR). Should the Employment Lands Strategy (ELS) that will be completed as part of the city’s MCR identify lands that are not necessary to remain as employment lands or employment areas, these lands may be considered for alternative land uses. Until the ELS has been completed, lands within these land use designations were not considered as having capacity for residential units.

In 2018 an Interim Employment Lands Update was conducted through which several sites were identified that could convert from employment uses to other uses. The sites are all located within the city’s designated greenfield area not within the built-up area and as such were not considered through the Residential Intensification Capacity Analysis.

- **Mixed-Use Corridors, Commercial Mixed-Use Centre, Service Commercial, Neighbourhood Commercial Centre, and Mixed Office/Commercial** – The purpose of these land use designations are to provide a range of uses to meet the needs of daily living and to disperse commercial uses throughout the city. Some of these land use designations provide for a mixture of residential and commercial uses. Lots with commercial land uses that permit residential, that meet the other criteria, were included in the residential capacity analysis. Lots designated service commercial, which does not permit residential uses, were considered but had a lower priority and were flagged as not currently having residential permissions. Through the HAS service commercial areas will only be considered for residential uses should it be determined that there is not an adequate supply of lands with current residential permissions to meet the forecasts and targets of APTG. In accordance with the Commercial Policy Review work which was completed in early 2020, it is important that all commercial lands within the city

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maintain a commercial function. Through the HAS assumptions of the amount non-residential floor space and residential floor space will be key in determining residential intensification potential of commercial and mixed-use sites.

- **Reserve Lands** – This land use designation applies to certain lands within the city that will eventually accommodate urban land uses but where there currently are servicing or access constraints, or where additional land use planning is required to determine appropriate land uses. Lots with reserve lands land uses, that meet the other criteria, were considered
- **Low Density Residential, Medium Density Residential, High Density Residential** – The purpose of the residential land use designations are to permit a range of housing types at varying heights and densities. Lots with residential land uses, that meet the other criteria, were considered

### Challenges

Interpretation was needed as to a particular lot's land use designation as the land use designation is not applied at the parcel level

## Secondary Criteria

1. **Location on an arterial or collector road** – Lots which have frontage on an arterial or collector road, were identified as a potential for residential intensification capacity. It is acknowledged that lots which have frontage on local roads may have the potential for residential intensification capacity at lower densities provided that they meet other criteria. For the purposes of the residential intensification analysis, lots with frontage on an arterial or collector road were preferred over those that had frontage on local roads.

### Challenges

Road classifications may be modified through the in progress Transportation Master Plan (TMP), the timing of which may not align with the timelines for this work. If the TMP information is available at the time that the HAS background study is being prepared, refinements to this criteria can be made to ensure that any updates that are required are considered

2. **Location on roads with existing or planned transit spines** – Lots which have frontage along the Gordon/Woolwich transit spine were identified. As areas of the city are considered for strategic growth areas through the HAS and growth scenario work, these areas will be reviewed together with ongoing work through the Transportation Master Plan to inform, as best as possible, any future transit spines.

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### **Challenges**

The timing of consideration and approval of future transit spines may not align with the timelines for this project.

## **Exclusion Criteria**

### **Cultural Heritage**

Lots that are within the Brooklyn and College Hill Heritage Conservation District, Guelph's first heritage conservation district, were reviewed together with the recommendations from the heritage conservation district plan to determine whether they had capacity for residential intensification.

Any properties and structures that are designated under the Ontario Heritage Act, or listed on the city's heritage register or Couling Inventory were flagged for further review, but were considered as part of the capacity for residential intensification.

### **Natural Heritage System and Floodway**

Lands within the natural heritage system as well as lands within the floodway portion of the city's floodplains were excluded from the residential capacity analysis.

### **Downtown**

As part of the city's previous municipal comprehensive review to conform to the 2006 Growth Plan, the boundary of the city's urban growth centre (downtown) (UGC) was delineated. The UGC boundary is not recommended to be reviewed as part of this municipal comprehensive review at this time. Since the last municipal comprehensive review, a secondary plan for downtown was approved which includes land uses, heights and densities to accommodate projected population and employment growth within the downtown to 2031. The secondary plan was created, in part, based on a capacity analysis that looked at the full build out of downtown based on the heights and densities within the secondary plan. The capacity of the downtown, within its existing boundary, to accommodate additional growth to 2051 was assessed and considered as part of the development of the HAS. The exclusion criteria outlined above also applied to downtown.

### **Historical development trends**

Not all residential intensification needs to, nor does it occur in intensification areas – that is in downtown, nodes and corridors. As outlined above, APTG provides for residential intensification to occur generally throughout the built-up area. Intensification also occurs through the creation of accessory apartments and through the creation of lots by consents. The following was used to determine opportunities for residential intensification generally throughout the built-up area.

## **Appendix A**

**Lots created through consents** – Lots within the built up area that have been created through consents since 2006 were reviewed and were used to determine the average number of lots created through consents on an annual basis.

**Accessory Apartments** – The number of accessory apartments created since 2006 were reviewed and were used to determine the average number of accessory apartment units created on an annual basis.

### **Challenges**

Using historical data did not account for the moratorium on accessory apartments in Wards 5 and 6 between 2011 and 2012. Additionally, the legislative framework for accessory apartments has changed in the last several years requiring municipalities to be much more permissive. Using a historic approach to predict the average number of accessory apartment in the future may have limitations.

## **Stage 2 – identifying opportunities for residential intensification**

Lots that have been identified as having capacity to accommodate more residential units through stage 1 were evaluated to determine whether they represented an opportunity for residential intensification. Lots which met the following criteria were identified as **not** having opportunities for residential intensification.

1. **Lots within plans of subdivision** – vacant single detached lots within plans of subdivision were not considered an opportunity for residential intensification as they are currently planned to accommodate one single detached dwelling. Lots with existing single detached dwellings within plans of subdivision with frontage on local roads that meet other criteria remained as an opportunity for residential intensification but were identified as a lower priority.
2. **Age of development** – Any site on which a residential building was constructed since 2015 was not considered an opportunity for residential intensification. Sites on which a residential building was constructed between 2005 and 2014 remained as an opportunity for residential intensification but were identified as a lower priority.

### **Other Plans**

Urban design concept plans demonstrate how areas in Guelph could be developed in the future. Concept plans have been developed for nodes and the Gordon Street Intensification Corridor. These concept plans were reviewed for insight to these areas capacity for additional residential units.

### **In progress land use studies**

The York/Elizabeth Land Use Study and Urban Design Concept Plan will look at lands that are within the general boundaries of York Road, the CNR rail line and Stevenson Street in the east side of Guelph. This study will, among other things, develop a land use strategy that includes recommended land use changes,

## **Appendix A**

recommendations for potential employment land conversions, recommendations for urban structure (e.g. nodes/corridors) components, and estimate projected people and jobs.

The opportunities for residential intensification for this area will be assessed through the residential intensification analysis. As the land uses within this area are under review, the Official Plan land use criteria will not be applied to these lands. The results of the residential intensification analysis will be reviewed and considered through the York/Elizabeth Land Use Study and Urban Design Concept Plan.

## **Next Steps**

Areas that met the primary criteria and at least one of the secondary criteria from stage 1 and were not excluded through stage 2 will be considered through the HAS. The HAS will be prepared by the Shaping Guelph Project Consultant in collaboration with the city. The purpose of the HAS is to confirm Guelph's population and housing needs to 2051 and outline an appropriate housing mix and density targets that conforms to APTG and aligns with the city's draft vision for growth.

# Appendix B

Guelph Official Plan and Secondary Plan existing  
minimum and maximum densities

## Appendix B

**Table A-1: Official Plan minimum and maximum densities**

Official Plan land use designations	People and Jobs/ha per urban structure	Minimum and maximum building height (storeys)	Minimum and maximum densities (units per hectare)
Urban growth centre (downtown)	Min: 150 persons and jobs combined per hectare	2 to 18 storeys	not applicable
Greenfield Area (low density residential)	Min: 50 persons and jobs/ha (s. 9.3.3, 9.5)	6 storeys	Maximum 60 units per hectare
Industrial	Min: 50 persons and jobs/ ha (s.9.5.f) in the greenfield area	None	None
Corporate business park	Min: 50 persons and jobs/ ha (s.9.5.f) in the greenfield area	None	None
Mixed business	Min: 50 persons and jobs/ ha (s.9.5.f) in the greenfield area	None	None
Institutional/research park	Min: 50 persons and jobs/ ha (s.9.5.f) in the greenfield area	None	None
High density residential	not applicable	3 to 10 storeys*	100 to 150 units per hectare
Medium density residential	not applicable	2 to 6 storeys*	35 to 100 units per hectare
Low density residential	not applicable	Maximum 3 storeys, maximum 6 storeys on arterial and collector roads*	Maximum 35 units per hectare
Mixed-use corridor	not applicable	Maximum 6 storeys*	100 to 150 units per hectare
Community mixed use centre	not applicable	10 storeys*	100 to 150 units per hectare
Neighbourhood commercial centre	not applicable	6 storeys*	Maximum 100 units per hectare
Mixed office / commercial	not applicable	Maximum 4 storeys*	Maximum 100 units per hectare

\*indicates increases to height and density through bonusing policies currently included in the Official Plan



## Appendix B

**Table A-2: Secondary Plan minimum and maximum densities**

Secondary Plan area	People and jobs per hectare	Minimum and maximum building height (storeys)	Minimum and maximum densities (floor space index)
Downtown Secondary Plan	150 persons and jobs/ha	2 to 18 storeys	0.6, 1.0 and 1.5 floor space index
Downtown Secondary Plan Mixed Use 1	not applicable	Dependent on location	Min FSI: 1.5 <i>with exceptions</i>
Downtown Secondary Plan Mixed Use 2	not applicable	Dependent on location	Min FSI: 1.0
Downtown Secondary Plan Institutional or Office Area	not applicable	Dependent on location	None
Downtown Secondary Plan Residential 1 Areas	not applicable	Dependent on location	None
Downtown Secondary Plan Residential 2 Areas	not applicable	Dependent on location	Min FSI: 1.0
Guelph Innovation District – <i>Greenfield Area</i>	90 persons and jobs/ha	2 to 10 storeys	Min net density: 100 units/ha Max net density: 150 units/ha
Guelph Innovation District Adaptive Re-use	not applicable	Dependent on location	None
Guelph Innovation District Mixed-use Corridor	not applicable	Dependent on location	Min net density: 100 units/ha Max net density: 150 units/ha
Guelph Innovation District Employment Mixed-use 1	not applicable	Dependent on location	None
Guelph Innovation District Employment Mixed-use 2	not applicable	Dependent on location	None
Guelph Innovation District Residential	not applicable	Dependent on location	Min net density: 35 units/ha Max net density: 150 units/ha

## Appendix B

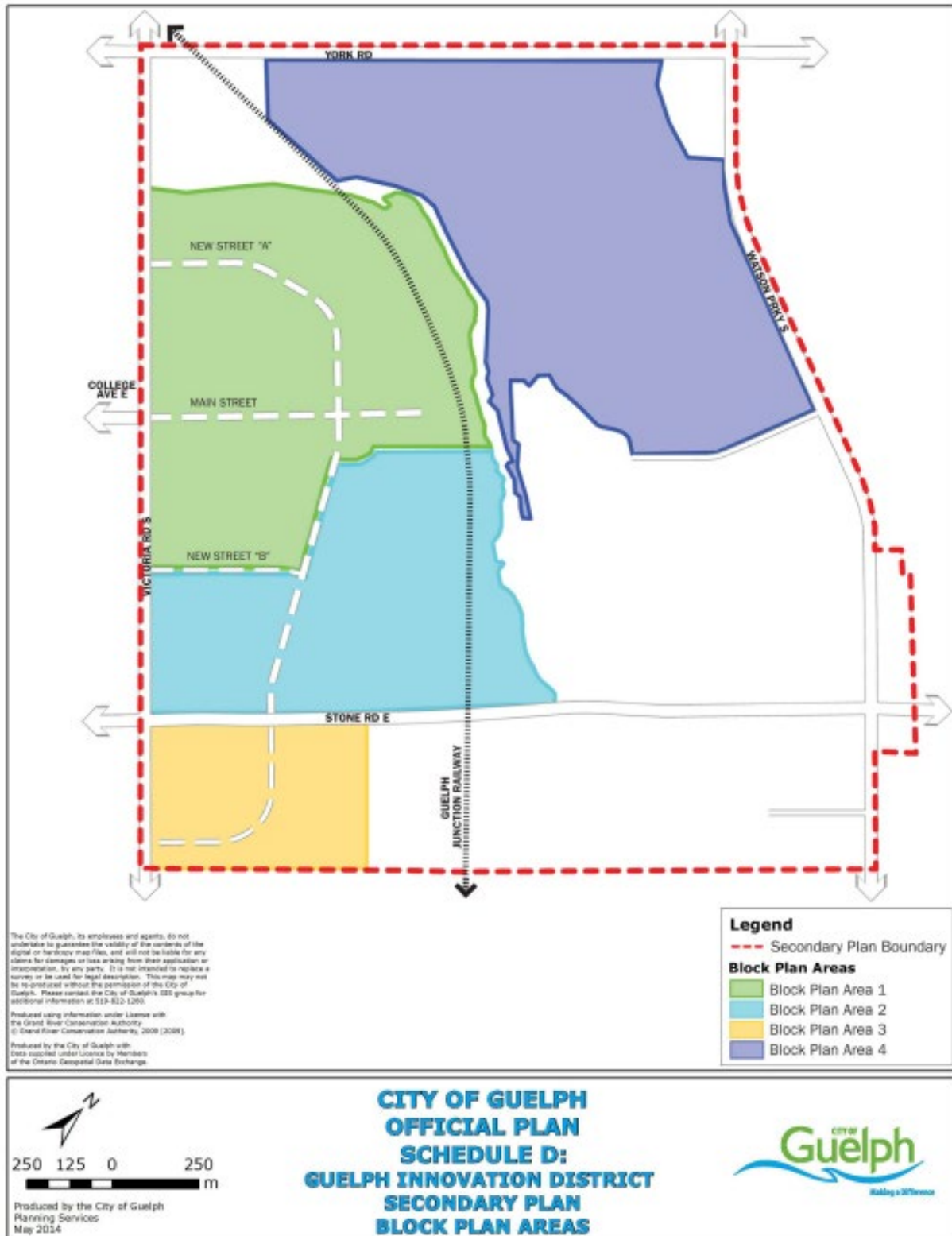
Secondary Plan area	People and jobs per hectare	Minimum and maximum building height (storeys)	Minimum and maximum densities (floor space index)
Guelph Innovation District Glenholme Estate Residential	N/A	Dependent on location	None
Guelph Innovation District Neighbourhood Commercial Centre	N/A	Dependent on location	None
Guelph Innovation District Service Commercial	N/A	Dependent on location	None
Guelph Innovation District Industrial	N/A	Dependent on location	None
Guelph Innovation District Major Utility	N/A	Dependent on location	None
Guelph Innovation District Open Space and Parks	N/A	Dependent on location	None

**Table A-3: Guelph Innovation District block plan area targets**

Block	Population Target	Employment Target	Residential Density (units/net ha)	Employment Density (jobs/net ha)
Block Plan Area 1:	4,600	1,700	75	135
Block Plan Area 2:	not applicable	2,500	not applicable	90
Block Plan Area 3:	2,000	1,300	75	135
Block Plan Area 4:	not applicable	750	not applicable	not applicable

**Appendix B**

**Figure A-1: Guelph Innovation District Block Plan Areas**



# Appendix C

## *Capacity for additional residential units methodology*

## **Appendix C**

As part of the Housing Analysis and Strategy, to generate the potential range of residential units that could be accommodated within the built-up area for growth scenario 1, the following methodology was used:

- Planned growth as identified in Downtown Secondary Plan and Guelph Innovation District Secondary Plan (the portion of land within BUA);
- The Residential Intensification Analysis;
- Existing Official Plan land uses including maximum building heights and densities. Where none exist, assumptions were used based on other sources;
- Additional residential unit assumptions added to account for gentle density.

Detailed assumptions are contained in Table B-1. It is important to note:

- In designations where there was not a maximum density identified in the City's Official Plan (e.g. non-residential designations within the Built-up Area), assumptions were used based on Greenfield density from the Official Plan. For example, the density assumption of 50 persons and jobs per hectare was applied for industrial and most other non-residential uses, as there were gaps in the Official Plan policy on non-residential densities.
- The assumptions applied for non-residential areas would require a significant change in the built form from what is presently built out. Floor Space Ratios (FSR) have been identified for the non-residential component of mixed use designated lands. This relies on a higher density built form (up to 1.0 FSR). The suggested assumption was based on professional judgement and is aligned with the permitted uses, however it is a significant change in the density and built-form that is present. All assumptions used can be found in **Table B-1**.

**Appendix C**

**Table B-1: Guelph Assumptions**

Land Use Designation	Max Residential Density	Non-Res Density	Portion of Land for Residential vs. Employment	Portion of Land for Residential vs. Employment	Residential Unit Type	Residential Unit Type	Residential Unit Type	Non-Residential Designation	Non-Residential Designation	Non-Residential Designation
Unit	Units/ha	FSR	% Residential	% Non-Res	Apartment	Multiples	Singles and Semi's	Industrial	Institutional	Commercial /Population -related
High Density Residential	150.0	0.8	95%	5%	100%	0%	0%	0%	0%	100%
Medium Density Residential	100.0	0.8	95%	5%	50%	50%	0%	0%	0%	100%
Low Density Residential	35.0	0.0	100%	0%	0%	30%	70%	0%	0%	0%
Mixed-Use Corridors	150.0	1.0	40%	60%	80%	20%	0%	0%	10%	90%
Community Mixed Use Centre	150.0	1.0	40%	60%	90%	10%	0%	0%	0%	100%
Neighbourhood Commercial Centre	100.0	0.5	20%	80%	100%	0%	0%	0%	0%	100%
Mixed Office / Commercial	100.0	0.5	40%	60%	30%	40%	30%	0%	35%	50%
Service Commercial	70.0	0.0	0%	100%	0%	0%	0%	0%	0%	100%
Industrial	50.0	0.0	0%	100%	0%	0%	0%	100%	0%	0%
Corporate Business Park	50.0	0.0	0%	100%	0%	0%	0%	20%	20%	60%
Mixed Business	50.0	0.0	0%	100%	0%	0%	0%	33%	33%	33%
Institutional/Research Park	50.0	0.0	0%	100%	0%	0%	0%	0%	80%	20%
Forecast People Per Unit (PPU) for cities*	not applicable	not applicable	not applicable	not applicable	1.67	2.45	3.33	not applicable	not applicable	not applicable
Average Unit Size (sq.ft.)	not applicable	not applicable	not applicable	not applicable	800	1200	2000	not applicable	not applicable	not applicable
Non-Res density estimates (sq.ft) *	not applicable	not applicable	not applicable	not applicable	not applicable	not applicable	not applicable	1200	700	300

\*Source: Watson DC study, April 2018 (m to sq.ft uses factor of 10.764)

\*italics = persons and jobs/ha

**Appendix C**

**Table B-2: Guelph Assumptions Secondary Plan**

Secondary Plan Areas	Max Density	Portion of Land	Portion of Land	Type of Non-Residential	Type of Non-Residential	Type of Non-Residential
Measure	Units/ha	% Residential	% Non-Res	Industrial	Institutional	Commercial/ Population-related
<b>GID Corporate Business Park</b>	75.0	0%	100%	0%	0%	100%
<b>GID Industrial</b>	36.0	0%	100%	100%	0%	0%
<b>Downtown (based on model)</b>	209	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable
<b>Downtown (based on 2031 targets LGMS)</b>	157	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable

\*italics = persons and jobs/ha

**Table B-3: Assumption Calculation Part 1**

Metrix	Residential	Non-Residential
<b>Building Efficiency Factor</b>	70%	80%

**Table B-4: Assumption Calculation Part 2**

Metrix	Hectare	Sq.Ft.
<b>Unit Conversion</b>	1.00	107639