

Information Report

Service Area Infrastructure, Development and Enterprise Services

Date Friday, April 27, 2018

Subject **Guelph Growth Monitoring Report 2017**

Report Number IDE-2018-61

Executive Summary

Purpose of Report

To provide a report on the achievement in 2017 of Official Plan policies which implement the Growth Plan for the Greater Golden Horseshoe; and provide information on monitoring of development activity and housing supply in accordance with the City's population forecasts to 2031 and the Provincial Policy Statement.

Key Findings

Development activity within the City is:

- Meeting the vision and policies of the City's Official Plan and achieving the targets and policies set by the Growth Plan and the Provincial Policy Statement (2014);
- Trending higher than the 20 year average since 2013 and is generally in line with long term projections in the Development Charges Background Study;
- Resulting in a range and mix of housing types with a greater proportion of townhouse and apartment units being constructed in recent years, in line with the City's growth vision and policies;
- Meeting the annual Intensification Target for the built-up area since 2012;
- Meeting the overall Greenfield Area Density Target (for developed and committed lands) as of 2014;
- Supporting the achievement of the Urban Growth Centre density target through residential intensification in the form of major apartment projects.

The City exceeds the minimum housing supply requirement of the Provincial Policy Statement which supports continued development activity. The supply translates into the creation of housing units as building permits are issued.

Financial Implications

None

BACKGROUND

Purpose of the Growth Monitoring Report:

The Growth Monitoring Report (Attachment 1) is an annual report that provides information on land supply, development activity, and achievement of City and Provincial Policies. This report presents year end data and informs the annual Development Priorities Plan and other City plans and documents in terms of growth projections and policies.

The report primarily focuses on the City's Official Plan policies that conform to the Growth Plan for the Greater Golden Horseshoe and the Provincial Policy Statement.

Official Plan Policies

The Official Plan conforms to the 2006 Growth Plan for the Greater Golden Horseshoe and sets: an intensification target for the built-up area; and density targets for the greenfield area and the Urban Growth Centre. Attachment 1 is Schedule 1 from the City's Official Plan which identifies the built-up area, Urban Growth Centre, and greenfield area of the City as defined by the 2006 Growth Plan.

Intensification Target: by the year 2015 and for each year thereafter, a minimum of 40% of the City's annual residential development will occur within the City's built-up area.

Built-up area: the lands identified within the built boundary as shown on Attachment 2.

Greenfield Area Density Target: the greenfield area will be planned and designed to achieve an overall minimum density target that is not less than 50 people and jobs combined per hectare. The greenfield area density target is measured over the entire designated greenfield area.

Greenfield area: is the area within the settlement area boundary that was not part of the built-up area in 2006 and is not part of the non-settlement areas (see Attachment 2)

Urban Growth Centre Density Target: The Urban Growth Centre, defined as downtown with boundaries established through the Downtown Secondary Plan, will be planned and designed to achieve a minimum density target of 150 people and jobs combined per hectare by 2031, which is measured across the entire Downtown.

The City's Official Plan provides policy directions for monitoring growth including policies directed at monitoring development activity to ensure that growth is consistent with population forecasts, intensification targets for the built-up area and density targets for the greenfield area. The Official Plan also requires tracking of the supply of residential units in accordance with the housing supply policies of the Official Plan. The housing supply policies conform to the Provincial Policy Statement policy 1.4.1.

PPS 1.4.1 *To provide for an appropriate range and mix of housing types and densities required to meet projected requirements of current and future residents of the regional market area, planning authorities shall:*

- a) *maintain at all times the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands which are designated and available for residential development; and*
- b) *maintain at all times where new development is to occur, land with servicing capacity sufficient to supply at least a three-year supply of residential units through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.*

Population and Employment Projections

The City's Official Plan sets out the following policy related to population and employment forecasts:

- 2.4.3.1 The city will accommodate growth by:
- i. planning for a population forecast of 175,000 people by the year 2031;
 - ii. promoting a steady rate of growth equivalent to an average population growth rate of 1.5% annually, which will allow growth to keep pace with the planning for future physical infrastructure and community infrastructure;
 - iii. ensuring the employment growth in the City is planned to keep pace with population growth by planning for a minimum of 92,000 jobs by the year 2031."

The Development Charges Background Study (2014) further breaks down the projected population increase into projections for number of housing units. By 2031, the projected total number of households is approximately 70,500; an increase of approximately 22,500 units since 2011.

Report

Highlights of the Monitoring Report

- The City's population for 2017 was estimated to have increased by 2,000 people to an estimated 135,000 people. The 2016 Census reported a population of approximately 132,000 people. Employment was estimated to have increased by 900 jobs to 80,500 jobs by the end of 2017. The 2016 Census reported that there were 79,600 jobs in Guelph.
- The average annual growth rate was slower for the period from 2006 to 2011. According to Statistics Canada, the annual growth rate was 1.2%, which increased to 1.7% between 2011 and 2016. The average annual growth rate between 2016 and 2017 was estimated to be 1.5%, which is just slightly below our anticipated rate of growth to 2031 of 1.6%.

- Residential building permit activity increased from 1088 residential units created in 2016 to 1,201 residential units created in 2017. The Development Charges Background Study (2014) projects an average of 1,170 units will be constructed per year to the year 2031. The number of residential units created annually has averaged 1,194 units since 2013, which is on trend with the City's long term average.
- In recent years, building permit activity has been largely sustained by the construction of apartment units within the City's built-up area.
- Registration of greenfield subdivisions continued to slow in 2017, with only one subdivision registration. The density of the committed lands within the designated greenfield area remained at approximately 52 persons and jobs per hectare in 2017, which meets the minimum greenfield density target set out by the City's Official Plan and the provincial Growth Plan.
- The Built-up Area has achieved the minimum 40% intensification target since 2012, and on average, 48% of all new residential development has occurred within the built-up area between the years 2008 and 2016. Since 2015, the first year that the City was required to achieve this minimum target under the Growth Plan, the City has achieved 56% of its residential growth in the built-up area. Major apartment developments have helped contribute to the achievement of this target, such as the latest 132 unit building in the Metalworks development at 63 Arthur Street South.
- The Urban Growth Centre (downtown) has increased its overall density to 97 persons and jobs per hectare in 2017, up from 96 persons and jobs per hectare in 2016 and 90 persons and jobs per hectare in 2011.
- The range and mix of housing units is becoming more balanced through new development activity with the overall existing housing stock experiencing a steady shift towards a higher proportion of townhouses and apartments. This trend is expected to continue to 2031, and result in a more balanced supply of housing units, when approximately 48% of the City's overall housing stock is anticipated to be detached and semi-detached units, compared to 54% in 2017.
- The City continues to maintain a housing land supply above the minimum requirements of the Provincial Policy Statement (PPS). Currently, there is approximately a five year supply of lands that are serviced, suitably zoned or within draft approved or registered plans, where the PPS requires at least a 3 year supply. The City is able to accommodate over 13 years of residential growth through residential intensification and lands that are designated and available for residential development where the PPS requires a minimum of 10 years.

Census

The census, conducted every 5 years, produces a demographic and statistical profile for the City and was conducted on May 10, 2016. This profile serves as a foundation and validation of the City's growth management data. As of the release of the 2017 Growth Management Monitoring Report, all of the major Census topics have been released and all monitoring data has been updated to incorporate the latest census data. It should be noted that any adjustments to the data were minor. Some of the data presented in the Guelph Growth Management Annual Monitoring Report cannot be updated during intercensal years, such as detailed employment data, and therefore will only be included following census years when the data becomes available.

Update to the Growth Plan (2017)

An updated Growth Plan came into effect on July 1, 2017. This updated Growth Plan introduced new policies that build upon the established vision and guiding principles of the 2006 Growth Plan. The updated Plan extended the growth horizon for the Greater Golden Horseshoe from the year 2031 to the year 2041, updated population and employment growth forecasts, and introduced policies that will increase the minimum intensification target and the minimum greenfield density target. The City of Guelph will be required to update its Official Plan to come into conformity with the updated Growth Plan and its new policies by 2022. Until that time, the City's existing Official Plan policies remain in effect for the density and intensification targets. Once Guelph's Official Plan has been updated and brought into conformity with the Growth Plan (2017), the Growth Management Monitoring Report will be revised to reflect the new growth forecasts and targets.

Financial Implications

None

Consultations

None

Corporate Administrative Plan

Overarching Goals

Service Excellence

Service Area Operational Work Plans

Our People- Building a great community together

Attachments

ATT-1 Growth Monitoring Report 2017

ATT-2 Schedule 1 - Growth Plan Elements

Departmental Approval

N/A

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Growth Monitoring Report 2017

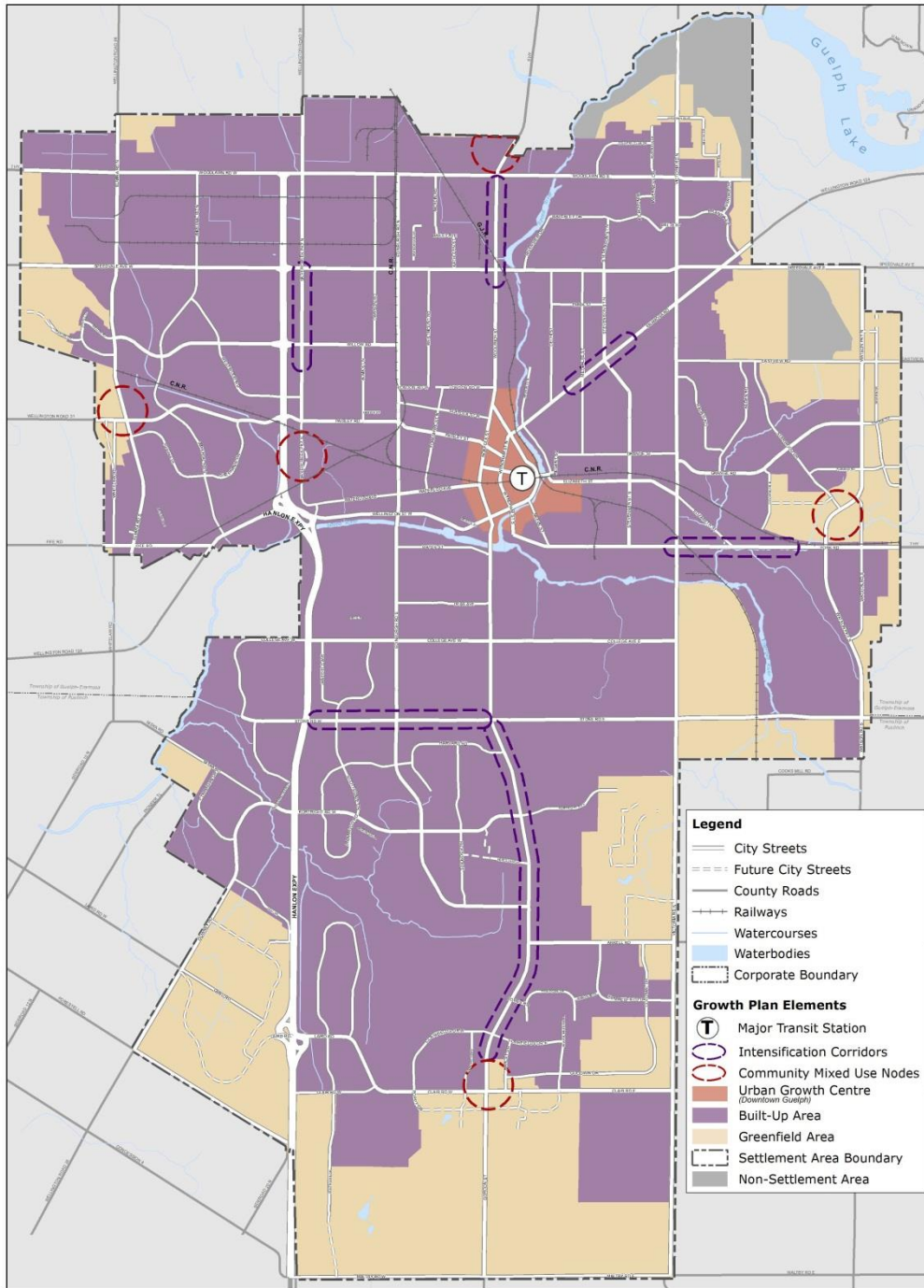


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1. Growth Plan Elements

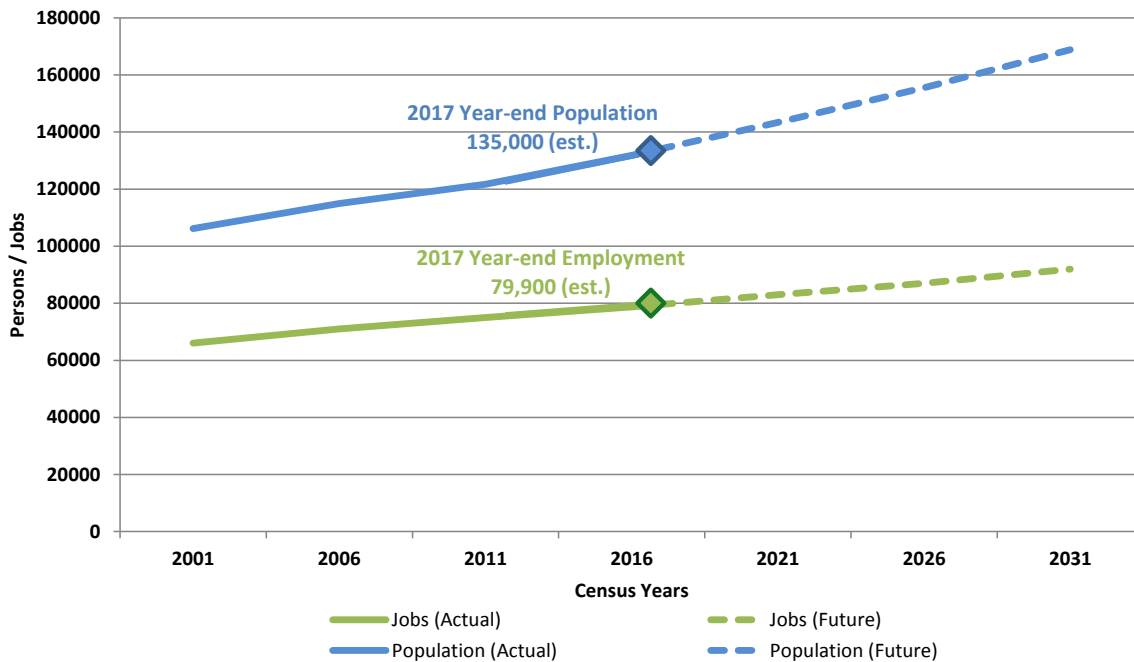
Growth Management Geography



The City of Guelph's Official Plan, amended by OPA 39 in 2010, includes policies that conform to the Growth Plan for the Greater Golden Horseshoe. The Official Plan identifies elements of the Growth Plan on Schedule 1, including the Urban Growth Centre, the designated greenfield area and the built-up area, all major geographic divisions of the City that have minimum intensification or density targets associated with them.

2. Population and Employment

2.1 Population and Employment Forecast to 2031



Population and Employment are on track to meet 2031 forecasts

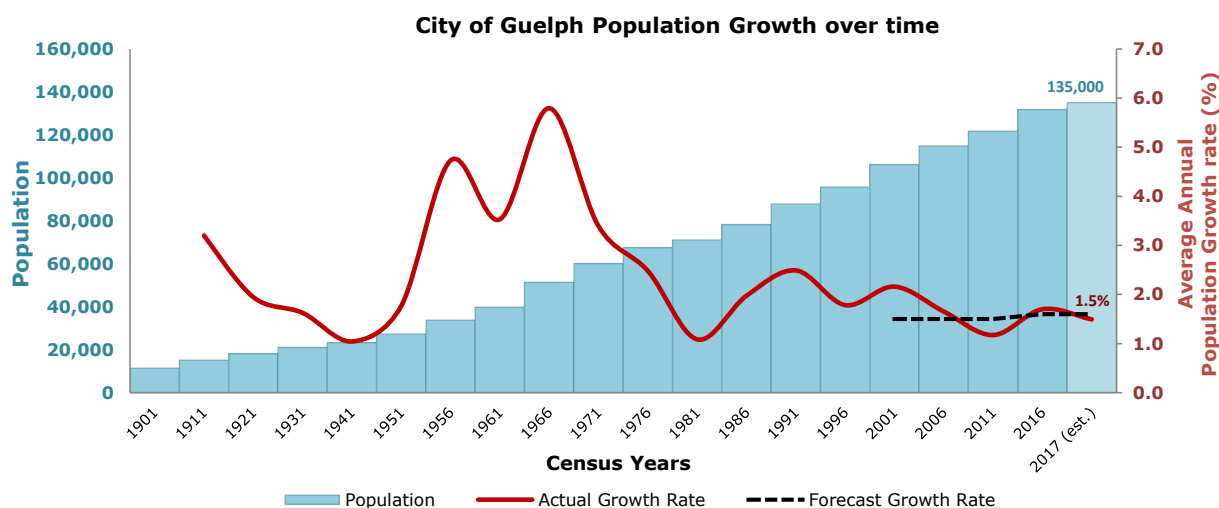
The City of Guelph is planning to achieve a population of 175,000 (169,000, excluding the net census undercoverage) and a minimum of 92,000 jobs by the year 2031. These figures represent an additional 43,000 people and an additional 12,000 jobs from the 2016 Census to the year 2031.

Between 2006 and 2011, the rate of construction activity in both the residential and the non-residential sectors had decreased to below historic averages and below anticipated levels, resulting in a lower than expected population in the 2011 census. However, construction activity has rebounded in recent years, and is on pace with the long term annual average as projected in the City's Development Charges Background Study (2014). Construction in the employment sector has also increased since 2011, primarily due to development interest in the Hanlon Creek Business Park. This increased residential and employment construction activity will help the City to better achieve its population and employment targets by 2031. The Canadian Mortgage and Housing Corporation expects housing construction to remain stable through 2019 and that employment will grow at a faster pace through 2019 than it has in recent years.

Based on building permit activity, the estimated population for the City of Guelph at the end of 2017 was 135,000, while employment was estimated to have increased to 79,900 jobs.

Sources:
 1. Statistics Canada, Census of Population, 2001-2016
 2. Canadian Mortgage and Housing Corporation, Housing Market Outlooks

2.2 City of Guelph Population Statistics



Population, Area, and Density, 2017		
	May 2016 (Census)	Dec 2017 (est.)
Population	131,794	135,000
Occupied Dwellings	52,090	53,023
Average Household Size (persons/dwelling)	2.5	2.5
Area (hectares)	8,806	8,806
Population Density (persons/hectare)	14.96	15.33
Gross Dwelling Density (units/hectare)	5.92	6.02

Comparator Municipalities	Average Annual Rate of Population Growth 2011 - 2016
Guelph	1.7%
Kitchener	1.3%
Oshawa	1.3%
Oakville	1.2%
Canada	1.2%
Kingston	1.0%
Richmond Hill	1.0%
Burlington	0.9%
Ontario	0.9%
Barrie	0.8%
Brantford	0.8%
Hamilton	0.7%
St. Catharines	0.3%

Guelph’s growth rate outpaced both the Provincial and National average

The high growth rate in Guelph seen in the 1950s and again in the 1960s in the chart above is in large part due to the annexation of neighbouring township lands when the population contained on those annexed lands from the township was assimilated with the population of the City of Guelph. Another large annexation occurred during the year 1993.

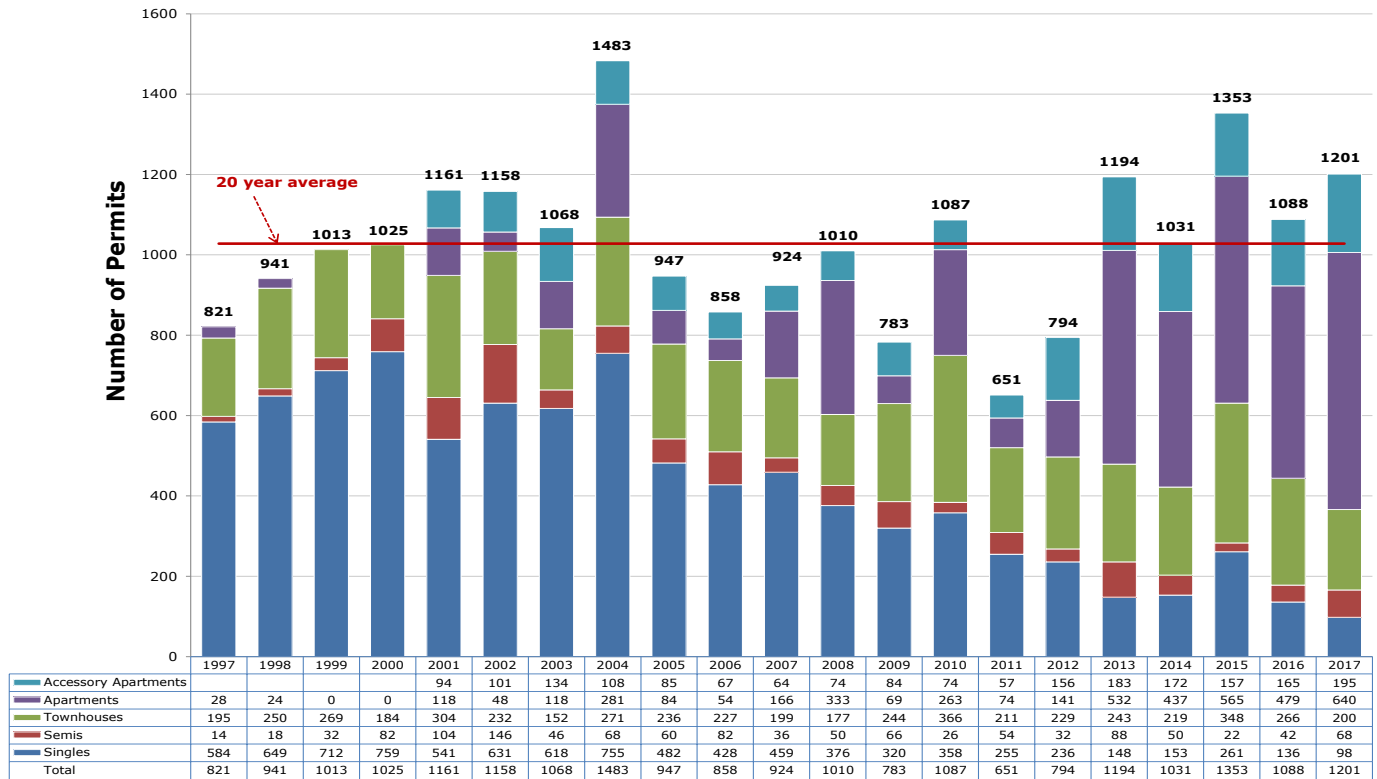
The economic downturn between the 2006 and 2011 census years resulted in a slower than anticipated average annual rate of growth of 1.2%, as seen in the chart above. Between 2011 and 2016, the economy improved and a stronger period of construction increased Guelph’s average annual rate of growth to 1.7%, surpassing both the provincial and the national average annual growth rates. With an estimated population of 135,000 at the end of 2017, Guelph’s population increased at an average annual rate of 1.5% per year since 2011, which is slightly lower than the City’s projected annual growth rate of 1.6%. The City’s average rate of growth positions the City to remain on track to achieve the projected population of 175,000 (169,000) by the year 2031. This rate of growth placed Guelph top among comparator municipalities, but was surpassed by many other communities in Ontario, such as the town of Milton (6.1%), Brampton (2.7%), and Markham (1.8%). Nationally, the western half of the country experienced the highest rates of growth, with the most of the major centres in the Prairie Provinces surpassing Guelph’s rate of growth such as: Lethbridge, AB (2.2%); Saskatoon, SK (2.2%); Regina, SK (2.3%); Calgary, AB (2.6%), and Edmonton, AB (3.0%).

Note: Comparator municipalities are local municipalities of similar population or government structure.

- Sources:
1. Statistics Canada, 2016 Census of Population
 2. City of Guelph Planning Services, 2018

3. Building Permit Activity

3.1 Historical Building Permits by Dwelling Type 1997-2017



Note: Accessory apartment tracking began in 2001.

Permits are trending higher than the historical average

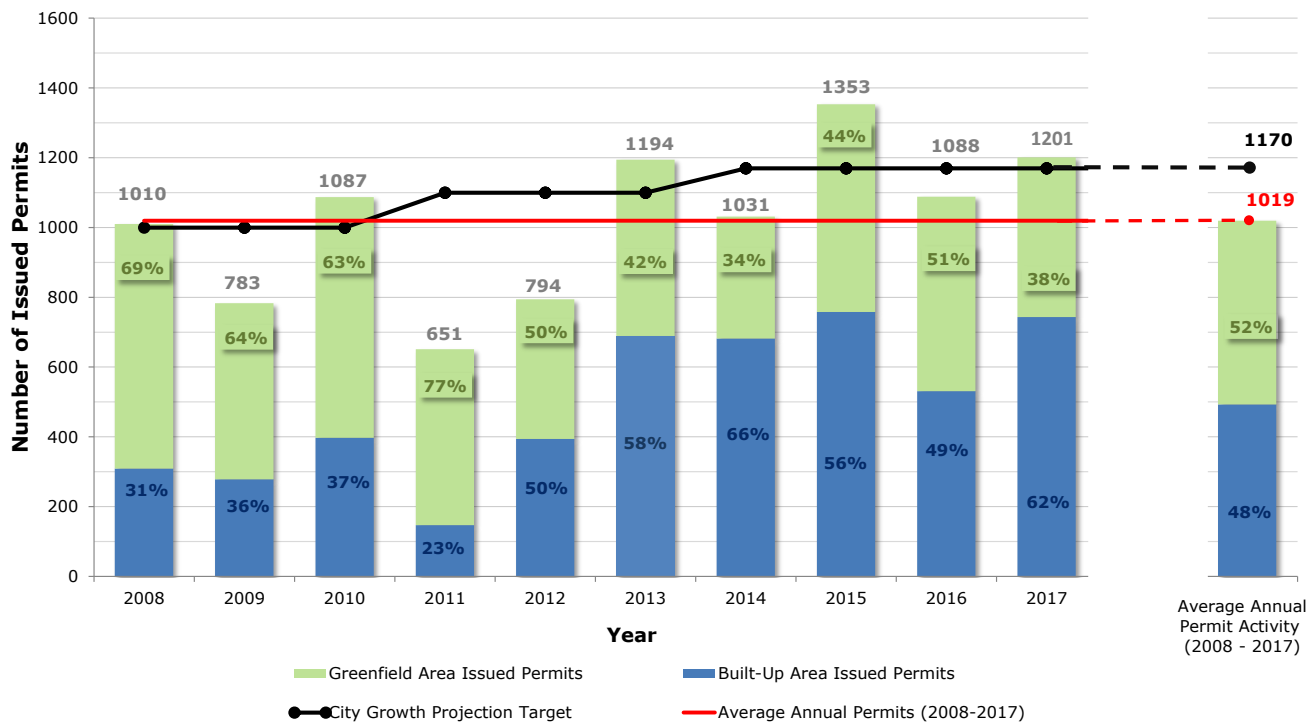
The number of residential permits issued in 2017 remained above the 20 year average for the fifth year in a row, supported in large part by the continued high levels of apartment and townhome construction. Apartment housing construction has been trending higher than historical averages since 2013, with 53% of the new units created in 2017 being apartments.

Over the past several years, townhouse and apartment units have become the dominant types of constructed housing units. This mix of new housing construction continues to contribute towards a more balanced city-wide housing stock, which aligns with the City’s housing forecasts, where proportionally, a larger number of townhouse and apartment units are being constructed than single and semi-detached dwellings. The Canadian Mortgage and Housing Corporation (CMHC) attributes this shift in the proportion of constructed dwelling types to decreased housing affordability, demographic changes leading to a decline in the size of a Census household family, and the introduction of policy changes through Places to Grow. This housing trend and the shift towards a more balanced housing stock is also in line with the projections in the Development Charges Background Study (2014) to 2031.

Sources:

1. Building Permit Summaries, City of Guelph Planning Services, 2018
2. Canadian Mortgage and Housing Corporation, Housing Market Outlooks
3. Canadian Mortgage and Housing Corporation, Housing Now

3.2 Annual Residential Permit Summary by Growth Plan Area* 2008-2017



The City is meeting its minimum intensification target

Under the Growth Plan, the City of Guelph is required to achieve 40% of its new development within the built-up area on an annual basis from the year 2015 until the time of the next municipal comprehensive review (MCR). Municipalities must complete their next MCR to be in conformity with the recently updated Growth Plan (2017) by 2022. The tracking of the City's building permits against intensification targets began in 2008. The majority of infill development since that time has been the result of increased apartment construction, primarily through redevelopment of properties in the City's downtown, and intensification corridors. The City of Guelph has on average, been exceeding the minimum intensification target over the course of the reporting period, and on an individual annual basis since 2012.

In 2017, the City achieved 62% of its residential development in the built-up area, exceeding the minimum 40% intensification target under the Growth Plan.

Source: Building Permit Summaries, City of Guelph Planning Services, 2018

3.3 Annual Residential Permit Summary Dwelling Types by Growth Plan Area 2008-2017

Building Permit Summary													
Permit Type		2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Total	Average
Single Detached Dwellings	Built-up Area	74	36	58	57	61	48	44	35	20	22	433	48
	Greenfield Area	302	284	300	198	175	100	109	226	116	76	1810	201
Semi-Detached Dwellings	Built-up Area	4	4	8	8	20	24	10	0	4	0	82	9
	Greenfield Area	46	62	18	46	12	64	40	22	38	68	348	39
Townhouses	Built-up Area	41	156	69	33	82	50	104	35	37	64	607	67
	Greenfield Area	136	88	297	178	147	193	115	313	229	136	1696	188
Apartments	Built-up Area	129	15	209	20	91	424	365	553	334	521	2140	238
	Greenfield Area	204	54	54	54	50	108	72	12	145	119	753	84
Accessory Apartments	Built-up Area	61	67	53	29	140	143	159	135	136	136	923	103
	Greenfield Area	13	17	21	28	16	40	13	22	29	59	199	22
Total	Built-up Area	309	278	397	147	394	689	682	758	531	743	4928	493
	Greenfield Area	701	505	690	504	400	505	349	595	557	458	5264	526
	City-wide	1010	783	1087	651	794	1194	1031	1353	1088	1201	10192	1019

The range and mix of housing is in line with the City’s growth vision and policies

The tracking and reporting of residential intensification targets in the City of Guelph began in 2008, and since that time, a few trends in residential permits have emerged.

Low Density Housing Trends

Over the first half of the reporting period to 2012, low density forms of housing comprised over 41% of the city-wide total number of new residential dwellings, falling to 19% over the latter half of the period when townhouses and apartments began to outpace construction of single and semi-detached dwellings. However, since 2008, a large proportion (greater than 44%) of all new units constructed in the designated greenfield area has been in the form of low density housing.

High Density Housing Trends

Apartment construction more than doubled over the second half of the reporting period, becoming the dominant form of new dwelling units, comprising more than 45% of all new residential dwellings since 2013. A higher proportion of those apartments are also now being constructed in the built-up area, a trend that has become more pronounced since 2013 and is a major contributing factor in helping the city achieve its intensification and housing mix targets.

Overall Housing Trends

While there are annual variations in the mix of constructed housing types, the result over the entire 10 year reporting period shows that there has been a relatively uniform distribution of housing types, contributing to a more balanced range and mix of new housing in the city. Early in the reporting period, a higher proportion of new development was occurring as lower density forms of housing in the designated greenfield area, while the latter portion of the reporting period shows the majority of units are being constructed in the built-up area as apartments. These trends are in line with the long term growth vision of the Provincial Growth Plan and the City’s Local Growth Management Strategy.

Note: Growth Plan Area refers to the division of the City into designated greenfield and built-up area as per the Growth Plan.

Source: Building Permit Summaries, City of Guelph Planning Services, 2018

3.4 New Residential Building Permits by Dwelling Unit Types - Monthly for 2016 & 2017

Month	Single-Detached		Semi-Detached		Townhouses		Apartments		Accessory Apartments		Building Permit Totals		Demolitions		Net Totals	
	2017	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017	2016
January	7	11	6	0	8	3	94	0	14	12	129	26	0	0	129	26
February	10	10	6	6	10	28	63	0	18	12	107	56	1	1	106	55
March	11	6	6	0	12	7	81	0	16	12	126	25	1	1	125	24
April	11	6	4	0	0	24	0	246	15	18	30	294	1	4	29	290
May	17	17	12	0	0	20	0	94	20	20	49	151	2	2	47	149
June	5	22	12	8	42	25	0	1	20	17	79	73	2	1	77	72
July	7	9	4	0	47	4	184	0	11	14	253	27	2	1	251	26
August	8	13	6	4	20	29	1	0	17	18	52	64	0	2	52	62
September	4	11	4	8	5	50	4	130	11	6	28	205	1	0	27	205
October	6	7	4	6	36	18	213	0	19	11	278	42	4	1	274	41
November	10	12	0	6	12	8	0	8	17	14	39	48	2	2	37	46
December	2	12	4	4	8	50	0	0	17	11	31	77	1	3	30	74
Totals	98	136	68	42	200	266	640	479	195	165	1,201	1,088	17	18	1,184	1,070

Issued residential permits align with the City's long term projections

The total number of residential permits issued in 2017 was higher than the previous year, in part due to the continued strength in apartment construction across the City. The average number of residential permits issued continues to align with the City's long term projections to 2031.

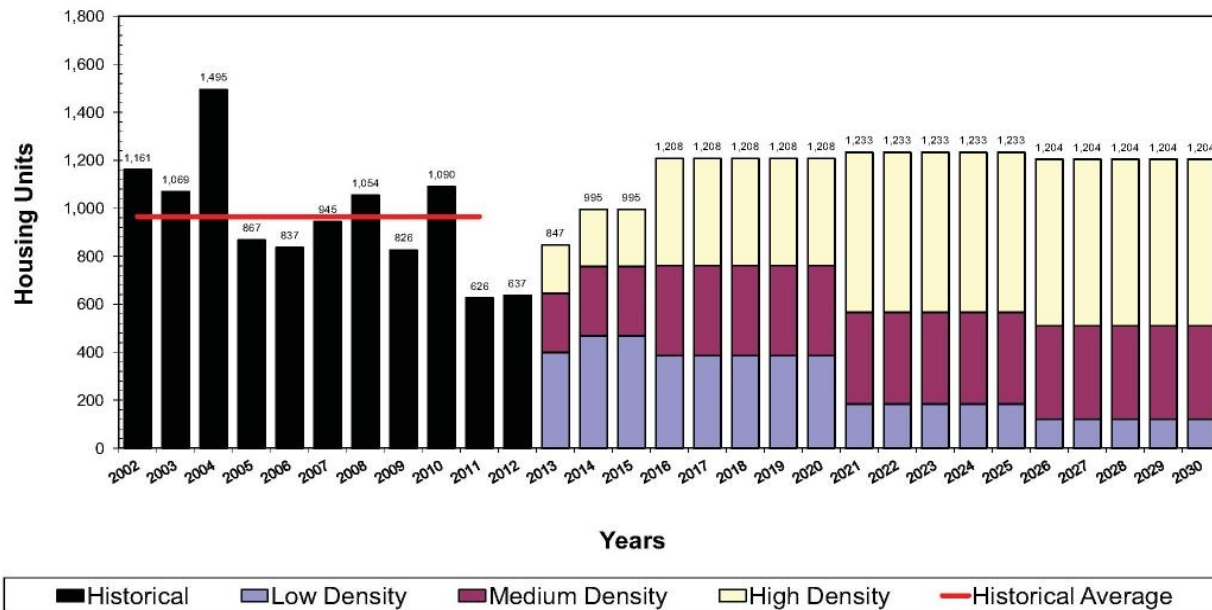
The proportional split between the housing types constructed in 2017 is generally reflective of the City's projected unit splits over the long term average to 2031, which anticipates a lower proportion of newer single and semi-detached construction and a higher proportion of new townhouse and apartment construction.

Sources:

1. Building Permit Summaries, City of Guelph Planning Services, 2018
2. Development Charges Background Study, Appendix A, March 2014

4. Housing Stock

4.1 City of Guelph Housing Forecast to 2031



The long-term housing forecast anticipates a shift in the mix of housing types

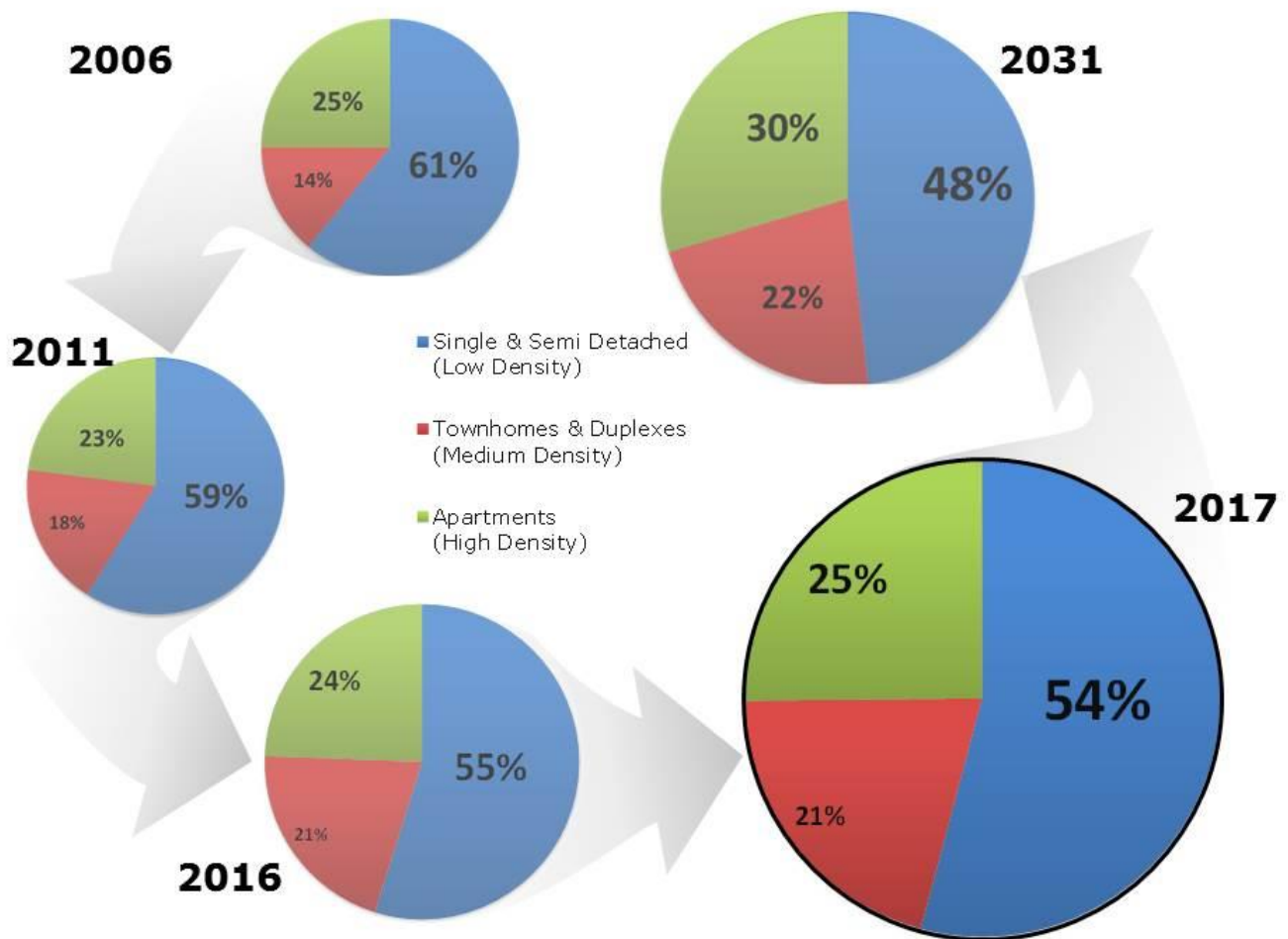
The housing forecast as presented in the Development Charges Background Study (2014) illustrates the number of units by housing type that are needed in order for the city to achieve its population target of 175,000 people (169,000 excluding the census undercoverage). A long term annual average of 1,170 units is targeted to be constructed per year between 2013 and 2030, consisting of an overall average of 22% low density dwellings, 31% medium density dwellings, and 47% high density dwelling units, with the mix gradually shifting over time.

In the years 2013 through 2015, the Development Charges Background Study (2014) anticipated that the number of residential permits issued each year would be fewer than 1,000, forecasting a gradual recovery by 2016, eventually exceeding 1,200 residential permits issued on average per year to the year 2030. The actual number of residential permits issued between 2013 and 2015 exceeded anticipated levels in the chart above from the Development Charges Background Study due to multiple large scale apartment construction projects.

In 2017, the number of residential permits issued remains on pace with the anticipated levels of residential construction in the Development Charges Background Study, and the number of issued residential permits issued since 2013 remain on track with the anticipated long term average of 1,170 units per year.

Sources:
 1. Figure A-1, City of Guelph Development Charge Background Study, March 2014
 2. Canadian Mortgage and Housing Corporation, Housing Now Reports

4.2 City of Guelph Housing Mix Total Housing Stock, 2006 to 2031



The housing stock is becoming more balanced

The City's current housing stock is comprised predominantly of low density housing in the form of single detached and semi-detached dwellings. A shift in the demand for different forms of housing combined with policy changes promoting transit supportive densities and a greater mix of housing will see a higher proportion of medium and high density forms of housing constructed. The result of this shift in demand will see a more balanced distribution of unit types in the City of Guelph by 2031, with approximately 48% of the City's overall housing stock in a low density form of housing.

Between 2016 and 2017, the proportion of single detached dwellings declined slightly, comprising 54% of the City's existing housing stock, a reduction of 7% since 2006.

Sources:

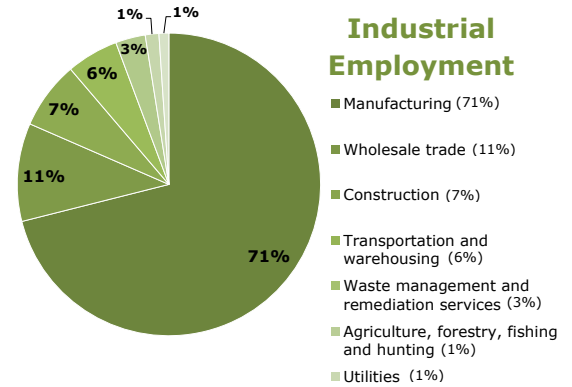
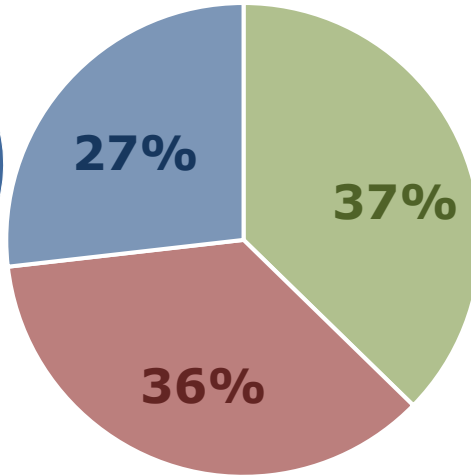
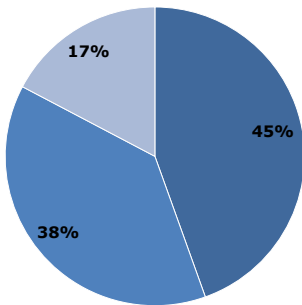
1. Statistics Canada, 2016 Census of Population
2. Development Changes Background Study, Consolidated Report, March 21, 2014.
3. City of Guelph Planning Services, 2018

5. Employment

5.1 Guelph Employment Base by Sector, 2016

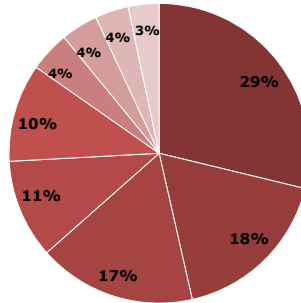
Institutional Employment

- Educational services (45%)
- Health care and social assistance (38%)
- Public administration (17%)



Population-Related Employment

- Retail trade (29%)
- Accommodation and food services (18%)
- Professional, scientific and technical services (17%)
- Finance and insurance (11%)
- Other services (except public administration) (10%)
- Real estate and rental and leasing (4%)
- Arts, entertainment and recreation (4%)
- Information and cultural industries (4%)
- Administrative and support (3%)



Guelph's has a balanced and diverse employment base

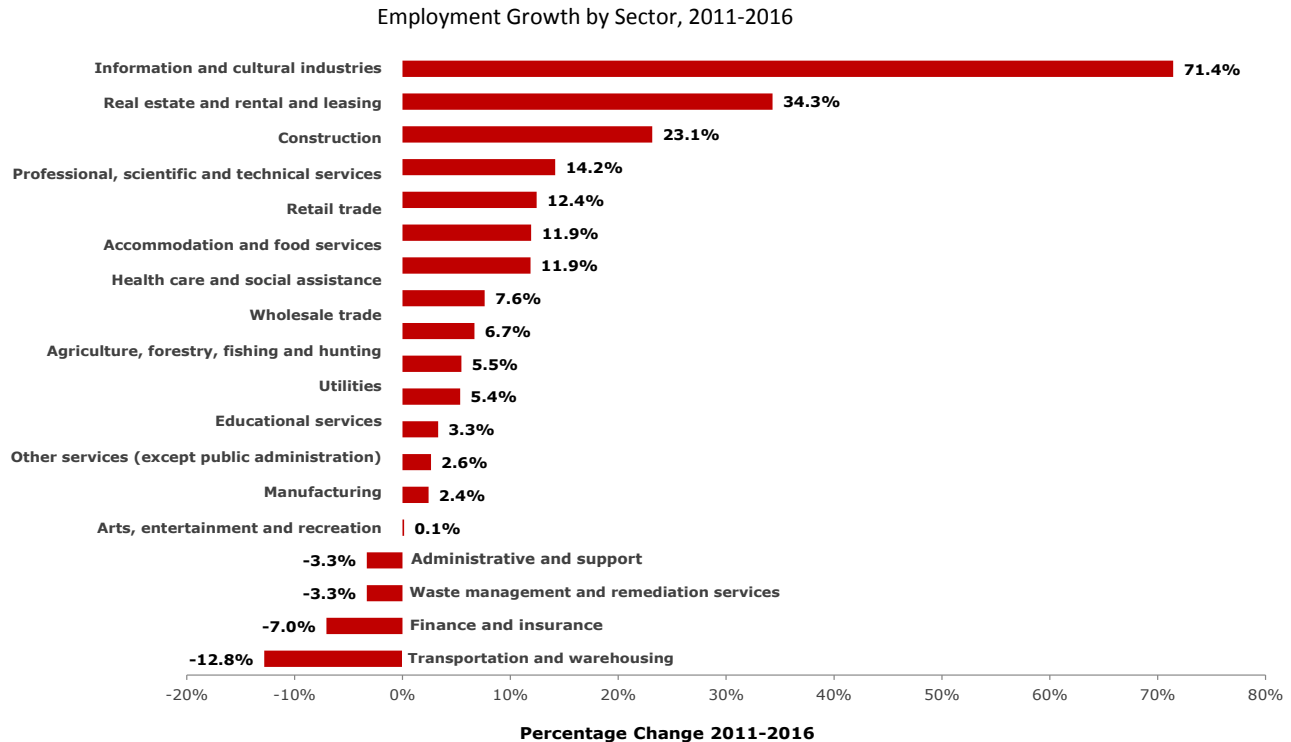
The City of Guelph has a balanced and diverse employment base, as seen in the chart above where the City's employment is nearly equally distributed between industrial, institutional, and population-related employment, which are those employment opportunities directly linked to population growth.

Amongst the industrial employment base, manufacturing was the dominant employment sector, comprising 71% of industrial employment. Retail trade was the dominant employment sector within the population-related employment, and amongst the City's institutional employment base, nearly half were employed in the education service sector.

Note:
Employment sectors with less than 100 employees were excluded from the summary of employment growth.

Sources:
1. Statistics Canada, 2016 Census of Population, Place of Work

5.2 Employment Growth by Industry 2011-2016



Employment is shifting towards knowledge based industries

Over the years, the growth among the City's employment base has been gradually shifting from a predominantly goods production sector towards a services oriented sector. This shift in employment is similar to the overall employment trends seen across the Greater Golden Horseshoe and the Province.

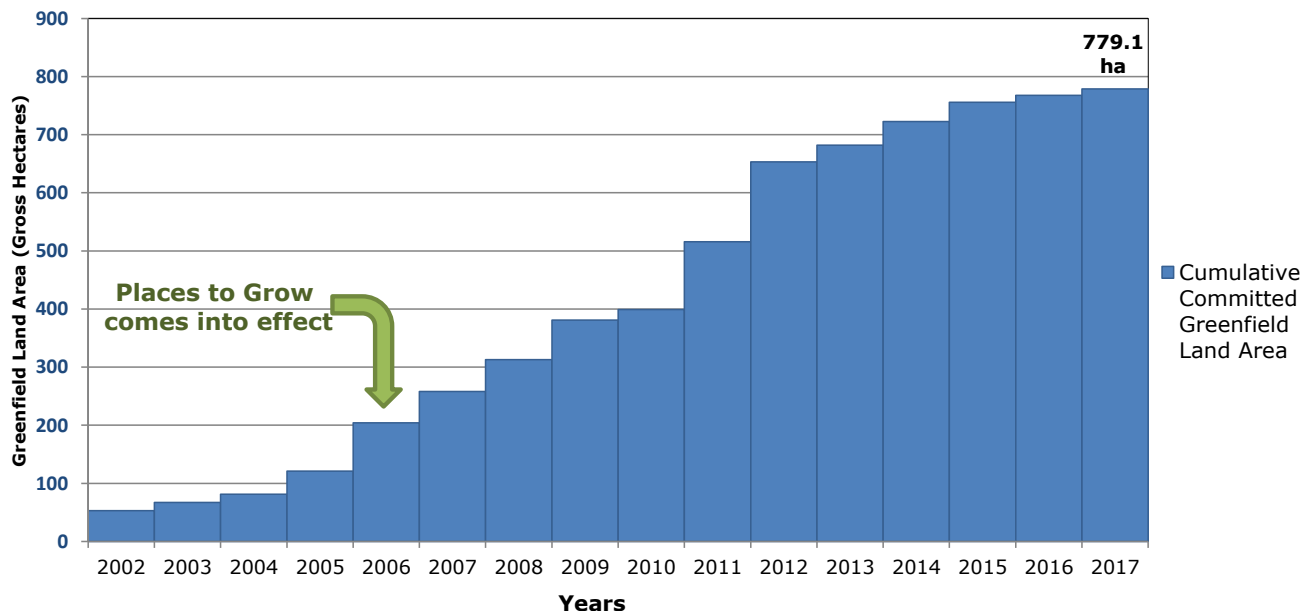
As the provincial economy is shifting away from the more traditional manufacturing sector and towards a more services based economy, employment in the knowledge based industries such as the scientific, health care, and information services experienced some of the greatest employment growth since the 2011 Census. Within the industrial sectors, construction experienced the greatest growth, while the transportation and warehousing sector experienced the largest decline. Manufacturing, Guelph's largest employment sector saw a modest growth of 2.4% between 2011 and 2016.

Note:
Employment sectors with less than 100 employees were excluded from the summary of employment growth.

Sources:
1. Statistics Canada, 2016 Census of Population, Place of Work

6. Greenfield Area

6.1 Committed* Greenfield Lands (gross area) 2002-2017



Development in the designated greenfield area is in line with Growth Plan policies

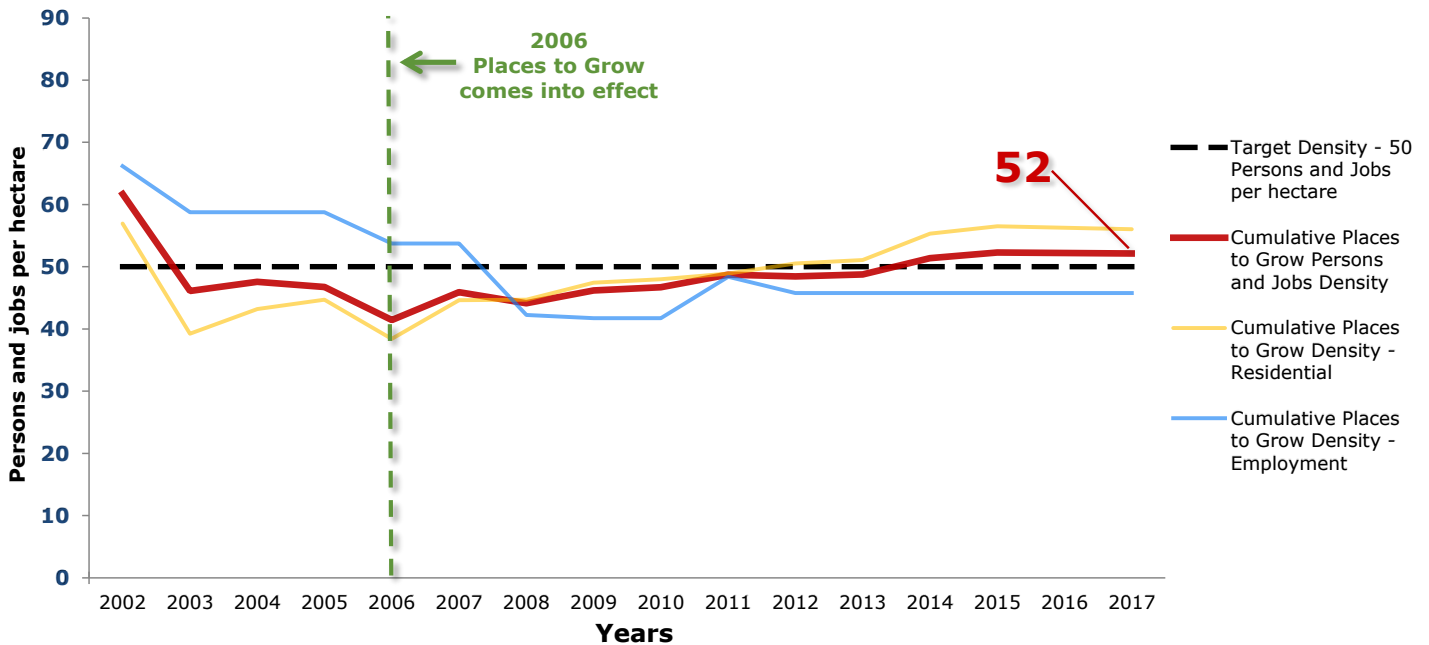
The designated greenfield area and policies were defined through the Growth Plan as a means to ensure the development of healthy, safe and balanced communities and make better use of land and existing infrastructure. The Growth Plan promotes the building of compact, transit supportive communities in the designated greenfield area. The chart above illustrates the cumulative rate in which lands are being committed* for development each year within the designated greenfield area. Prior to the effective date of the Growth Plan in 2006, the designated greenfield area included lands with existing planning approvals, but which had not yet been constructed. It is for this reason the chart illustrates a timeline prior to the effective date of the Growth Plan. By the end of 2017, 779 hectares of the City's 2020 hectares of designated greenfield area had planning commitments, inclusive of natural areas protected through the plan of subdivision process. This represents an increase of 11 hectares since 2016, bringing the total amount of committed greenfield lands to approximately 39% of the total designated greenfield area.

Notes:

1. *The term *committed* refers to lands within registered plans of subdivision and lands that have been zoned outside of plans of subdivision.
2. This figure excludes any lands within the designated greenfield area that are not considered to be in their final form.
3. The designated greenfield area does not include the non-settlement area designation as illustrated on Schedule 1B, Growth Plan Elements of the 2001 Official Plan, September 2014 Consolidation.

Source: City of Guelph Planning Services, 2018

6.2 Greenfield Area Cumulative Persons and Job Density within Committed* Lands



Committed greenfield lands are meeting the minimum greenfield density target

The City of Guelph’s committed* lands within the designated greenfield area are currently estimated to be achieving a density of 52 persons and jobs per net hectare, remaining steady since 2015.

An initial density spike on the first lands to be committed in the designated greenfield area was due to the approval of several large commercial sites along with multiple large scale apartment developments between the years 2002 and 2004. These initial commitments resulted in densities higher than the targeted density level for the designated greenfield area (due to the scale of the sites involved and the absence of natural heritage features on the development blocks). However, during the following years of 2005 through 2008, the designated greenfield area experienced a decrease in the overall density to levels below the target. This was due to the registration of subdivisions that predated the Growth Plan. These subdivisions were comprised primarily of lower density forms of housing which also included natural heritage features that cannot be excluded from the net density calculations of the designated greenfield area, per the 2006 Growth Plan. The greenfield densities began to trend steadily upwards starting in 2009, reflective of the registration of plans of subdivision that were received after the Growth Plan came into effect in 2006. The development proposals received after 2006 were obligated to comply with the Growth Plan’s policies, including the plan’s greenfield density policies, resulting in developments with densities that contribute to the achievement of the greenfield density target. The overall density target for the designated greenfield area is a minimum of 50 persons and jobs per hectare, measured over the entirety of the designated greenfield area, excluding areas where provincial plans and policies prohibit development.

With the release of updated household information as part of the 2016 Census, it was observed that densities on committed residential lands in the designated greenfield area had increased slightly to approximately 56 persons and jobs per hectare over 490 gross hectares of land (24% of the designated greenfield area). This density increase was due to a greater persons per dwelling ratio observed in the 2016 Census. Conversely, densities on employment lands across the designated greenfield area declined slightly, a trend that is being observed on employment lands across the Greater Golden Horseshoe. The decline in employment densities is being driven primarily by automation in the manufacturing sector and the development of large-scale warehousing and logistics centres, which generate low employment levels. In 2017, it was estimated that the employment lands in Guelph generated approximately 46 persons and jobs per hectare over 289 hectares of land (14% of the designated greenfield area).

Following the City's municipal comprehensive review to conform with the 2017 Growth Plan, the measure for determining densities in designated greenfield lands will be revised to address the changes to the Growth Plan.

Notes:

1. *The term *committed* refers to lands within registered plans of subdivision and lands that have been rezoned outside of plans of subdivision.
2. Greenfield densities have the ability to change over time once building permits are issued on committed lands.
3. This figure excludes lands within the Designated Greenfield Area that are not considered to be in their final form
4. For the purposes of this chart, residential densities include population serving employment, such as school sites and neighbourhood commercial sites found in residential plans of subdivision. Employment densities include community mixed use nodes, industrial and corporate business park.

Source: City of Guelph Planning Services, 2018

7. City of Guelph Housing Supply

Housing Supply in the Built-up Area

Supply	Single Detached	Semi-Detached	Townhomes	Apartments	Total Units	Years of Supply
Short term supply	237	12	565	2315	3129	2.7
Designated and Available	1	2	786	1285	2074	1.8
TOTAL	238	14	1351	3600	5203	4.5

Housing Supply in the Designated Greenfield Area

Supply	Single Detached	Semi-Detached	Townhomes	Apartments	Total Units	Years of Supply
Short term supply	546	42	554	2350	3492	3.0
Designated and Available	905	0	2742	3245	6892	5.9
TOTAL	1451	42	3296	5595	10384	8.9

City-Wide Housing Supply

Supply	Single Detached	Semi-Detached	Townhomes	Apartments	Total Units	Years of Supply
Short term supply	783	54	1119	4665	6621	5.7
Designated and Available	906	2	3528	4530	8966	7.7
TOTAL	1689	56	4647	9195	15587	13.4

The City is meeting its housing supply requirements

These charts illustrate the supply of housing by type that is available for future development. The housing supply policies of the Provincial Policy Statement (PPS, 2014) require the city to plan for an appropriate range and mix of housing types and densities to meet future projections. According to the PPS definition, the city exceeds the minimum short term supply of 3 years, with a 5.7 year supply of housing available for development within lands that are suitably zoned with sufficient servicing capacity. The City also has a healthy longer term housing supply that includes supply on lands that are designated and available, calculated at over 13 years, which meets the minimum PPS housing supply requirement of 10 years.

Considering the 10-year household growth forecast in the 2014 Development Charges Background Study, there is a 2.4 year short-term supply of single detached and semi-detached housing, a 3.2 year short-term supply of townhomes, and a 10.4 year short-term supply of apartments. When considering the City's long-term housing forecast to 2031, there is a 3.3 year short-term supply of single detached and semi-detached housing, a 3.1 year short-term supply of townhomes, and a 9 year short-term supply of apartments.

Notes:

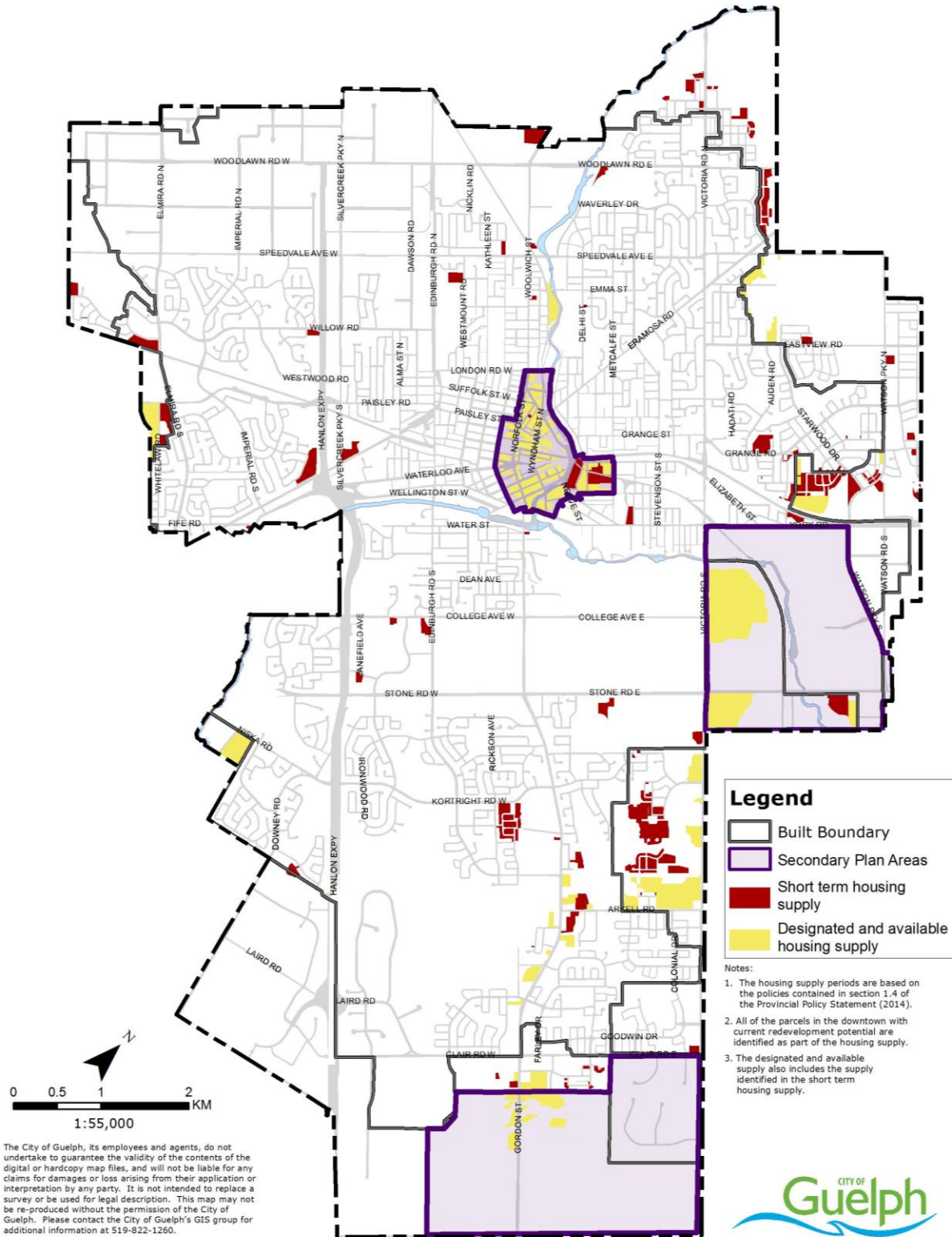
1. The PPS, 2014 defines the designated and available housing supply as the total available housing supply, including the short term, three-year supply of residential units. However, for the purposes of illustrating the available residential unit supply in the tables above, the designated and available supply does not include the short term supply of residential units.
2. Years of housing supply are calculated based on a long term average number of units forecast per annum of 1170. [Figure A-1, Appendix A, Development Charges, March 21, 2014]
3. Short term supply includes units on lands that are suitably zoned to facilitate residential intensification and redevelopment, along with lands contained within draft approved and registered plans of subdivision
4. Designated and available supply refers to residential units on lands that are designated and available for residential development. This includes units forecasted as part of the Guelph Innovation District Secondary Plan.
5. The Guelph Innovation District is anticipated to generate approximately 3200 units, or 2.7 yearsilable for residential development. This includes unLands that are not yet designated for residential development, such as the reserve lands are not included in the current housing supply.
6. The 10-year (2013-2023) and long-term (2013-2031) household growth forecasts are based on the residential growth forecasts contained in Appendix A of the 2014 Development Charges Background Study.

Sources:

1. City of Guelph Planning Services, 2018
2. Provincial Policy Statement, 2014
3. Development Charges Background Study, March 2014

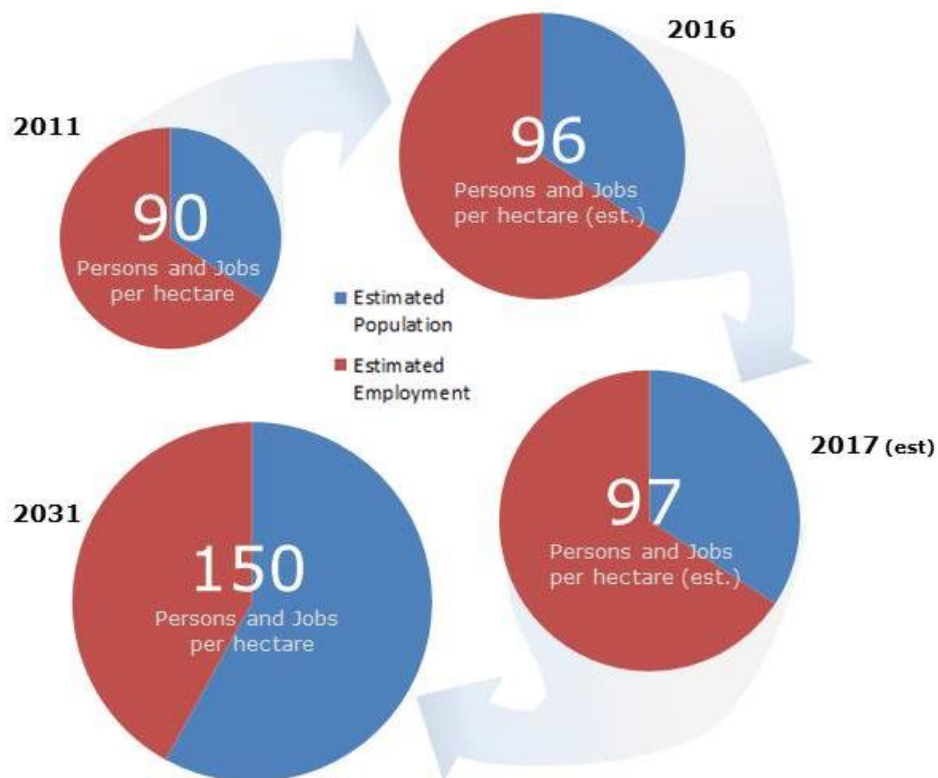
City of Guelph Housing Supply Sites

Short Term, and Designated and Available Housing Supply



Source:
1. City of Guelph Planning Services, 2018

8. Urban Growth Centre Population and Employment



The City is on track to achieve its Urban Growth Centre density target

The City of Guelph’s Urban Growth Centre (downtown), with boundaries established through the Downtown Secondary Plan in 2013 is being planned to accommodate a density of 150 persons and jobs per hectare by the year 2031. Dwelling counts and population data from the 2016 Census, in addition to the building permits constructed over the past year were used to calculate the Downtown density for 2017. Several projects added both residential dwellings and commercial floor space downtown, resulting in a modest increase in the Downtown density to 97 persons and jobs per hectare. The majority of the future downtown density to 2031 will result from residential intensification in the form of medium and high density residential dwellings.

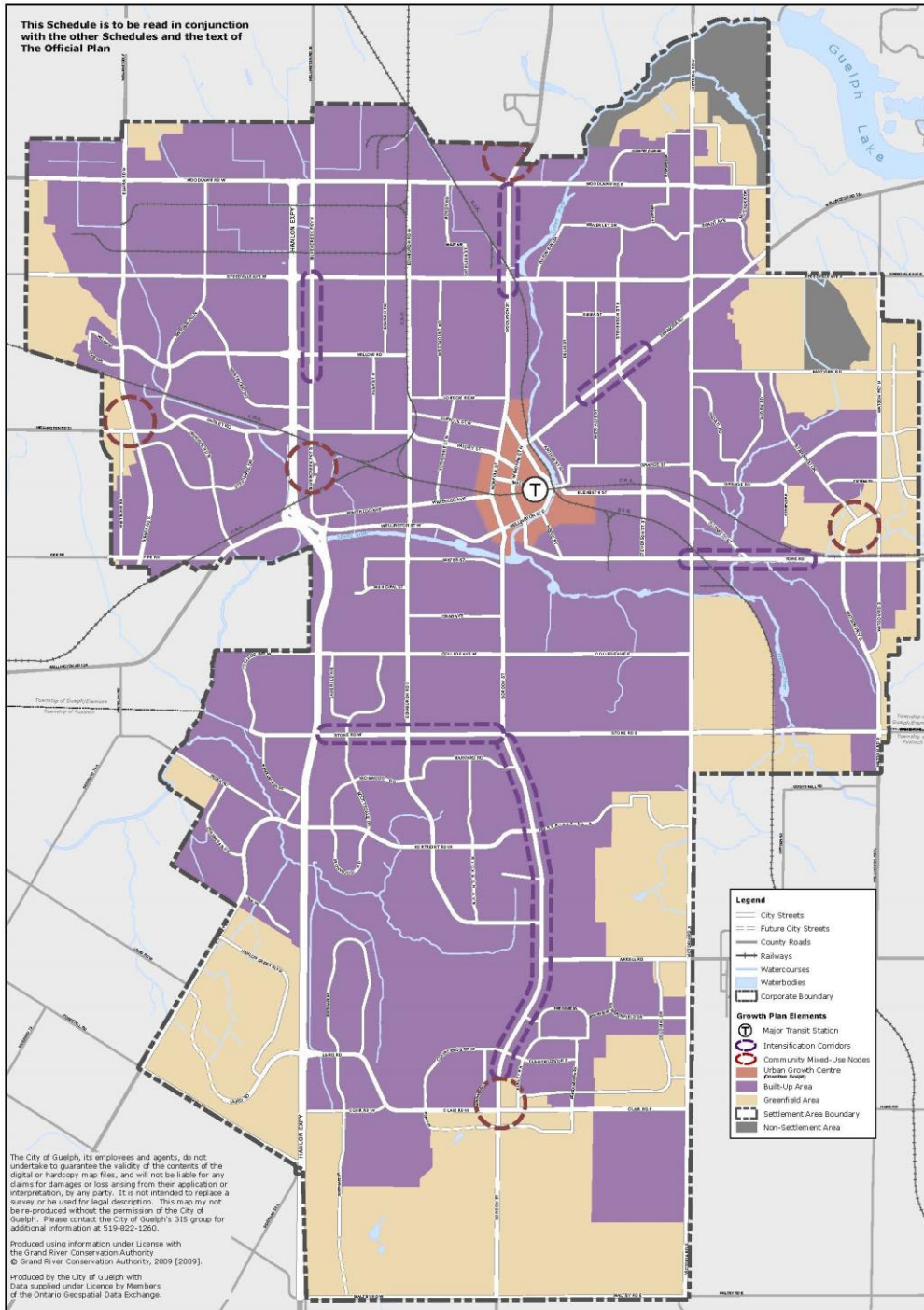
Progress towards achievement of the Urban Growth Centre density target will continue through implementation of the Downtown Secondary Plan and further intensification of the downtown. Over the next decade, the remaining phases of The Metalworks development and the development at 45 Yarmouth St could together bring an estimated additional 500 residential units into the downtown.

Sources:

1. Statistics Canada, 2016 Census of Population
2. City of Guelph, Downtown Secondary Plan
3. Building Permit Summaries, City of Guelph Planning Services, 2018

Attachment 2

Growth Plan Elements (Schedule 1 of the Official Plan)



1 0.5 0 1 KM

Projection: UTM 17N NAD83
Produced by the City of Guelph
Planning Services
March 2018 Consultation

**CITY OF GUELPH
OFFICIAL PLAN
SCHEDULE 1:
GROWTH PLAN ELEMENTS**

CITY OF Guelph
Making a Difference