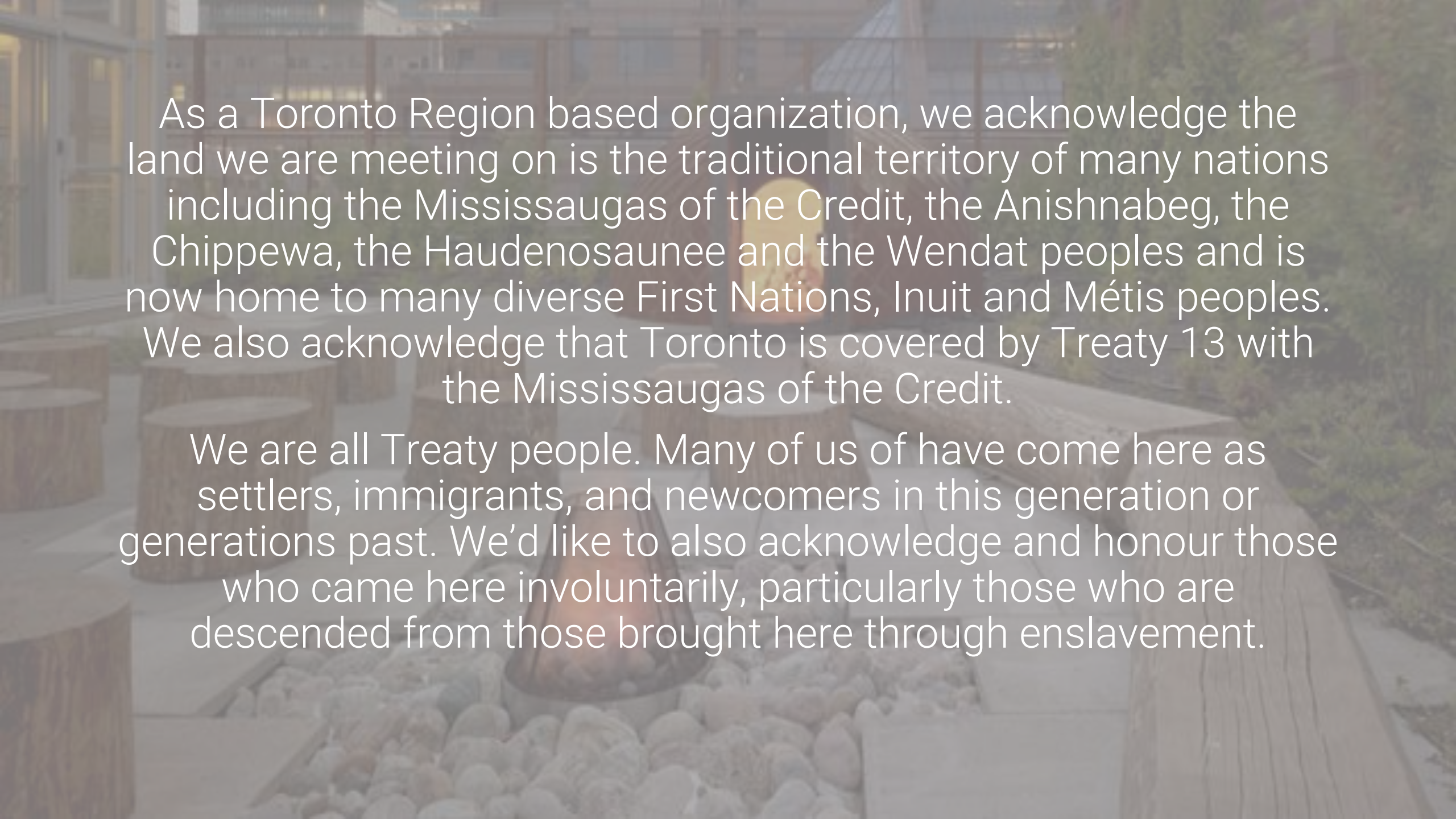


APRIL 12, 2022

MEET THE CHIEF PLANNERS



As a Toronto Region based organization, we acknowledge the land we are meeting on is the traditional territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee and the Wendat peoples and is now home to many diverse First Nations, Inuit and Métis peoples. We also acknowledge that Toronto is covered by Treaty 13 with the Mississaugas of the Credit.

We are all Treaty people. Many of us of have come here as settlers, immigrants, and newcomers in this generation or generations past. We'd like to also acknowledge and honour those who came here involuntarily, particularly those who are descended from those brought here through enslavement.



Mark Kindrachuk

Intermarket Properties





Emma West
Chair, ULI Toronto



Peter Ballon
CPP Investment Board



May 14-16, 2011

SPRING MEETING

TORONTO



May 16-18, 2023

SPRING MEETING TORONTO

JOIN US



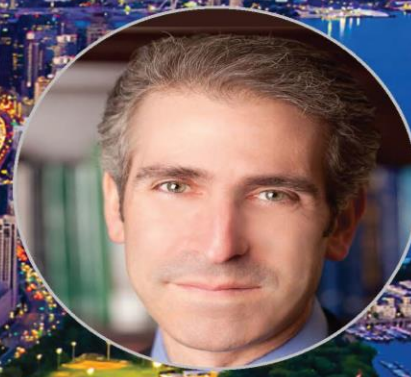
Ashley Lawrence

Senior Vice President and
Head of Alternatives,
AGF Investments



Cyndi Rottenberg-Walker

Partner,
Urban Strategies Inc.



Ken Tanenbaum

Vice Chairman,
Kilmer Van Nostrand Co. Limited



Allison Wolfe

Chief Financial Officer and Global
Head of Portfolio Management,
Oxford Properties Group

Welcome & Congratulations



Michelle Ackerman
Incoming ULI Toronto Chair



Emma West
Chair, ULI Toronto

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#MeetTheChiefPlanners

MEET THE CHIEF PLANNERS

Keynote Remarks



Kevin Eby
Formerly at Region of Waterloo

ULI Meet the Chief Planners



Planning for Too Many Singles ... ?

Kevin Eby, RPP, PLE

“The significant problems we face today cannot be solved at the same level of thinking we were at when we created them”

Albert Einstein



We are planning for way too many
singles ...

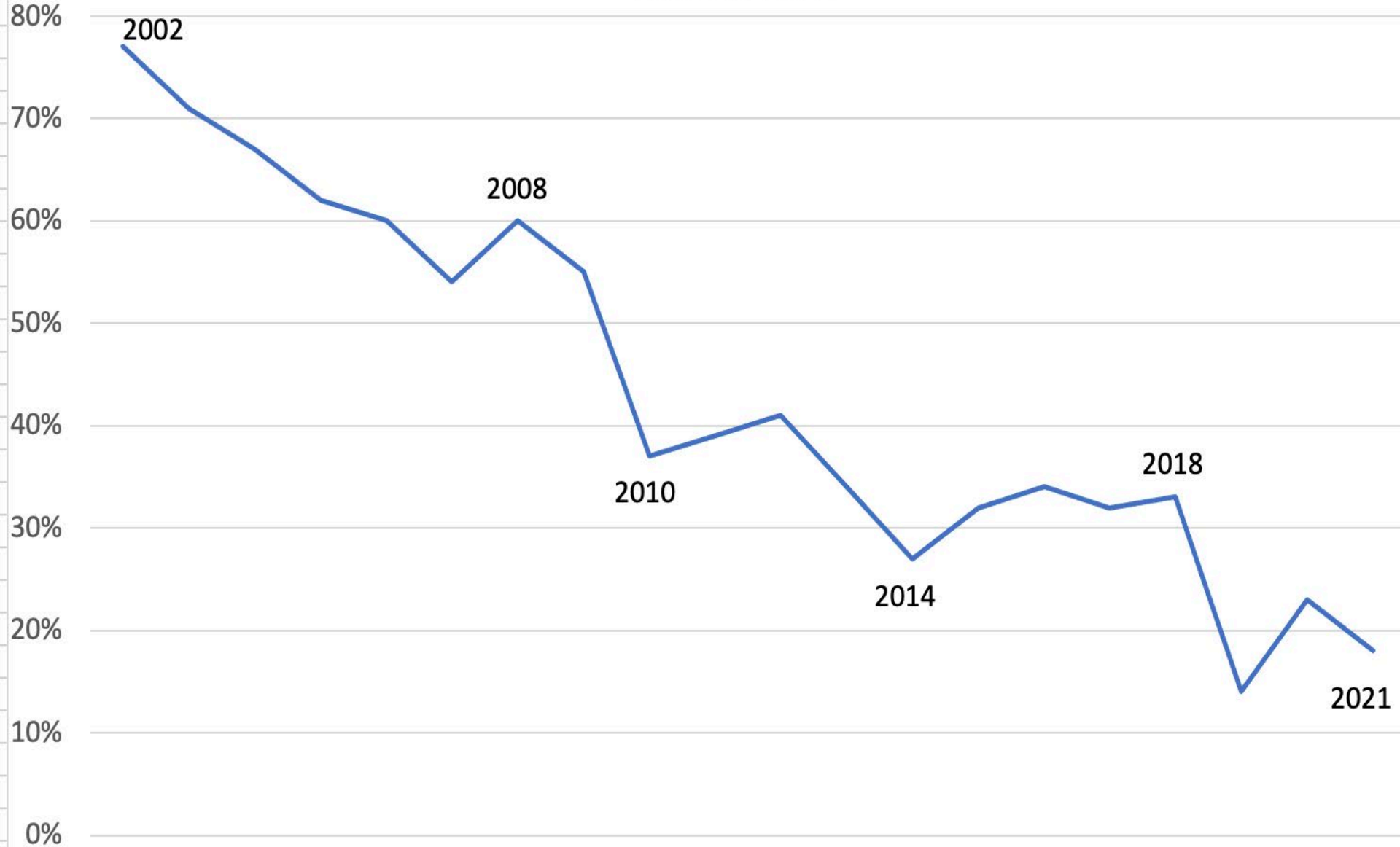
We are planning for way too many
singles ...

... the market is changing, and

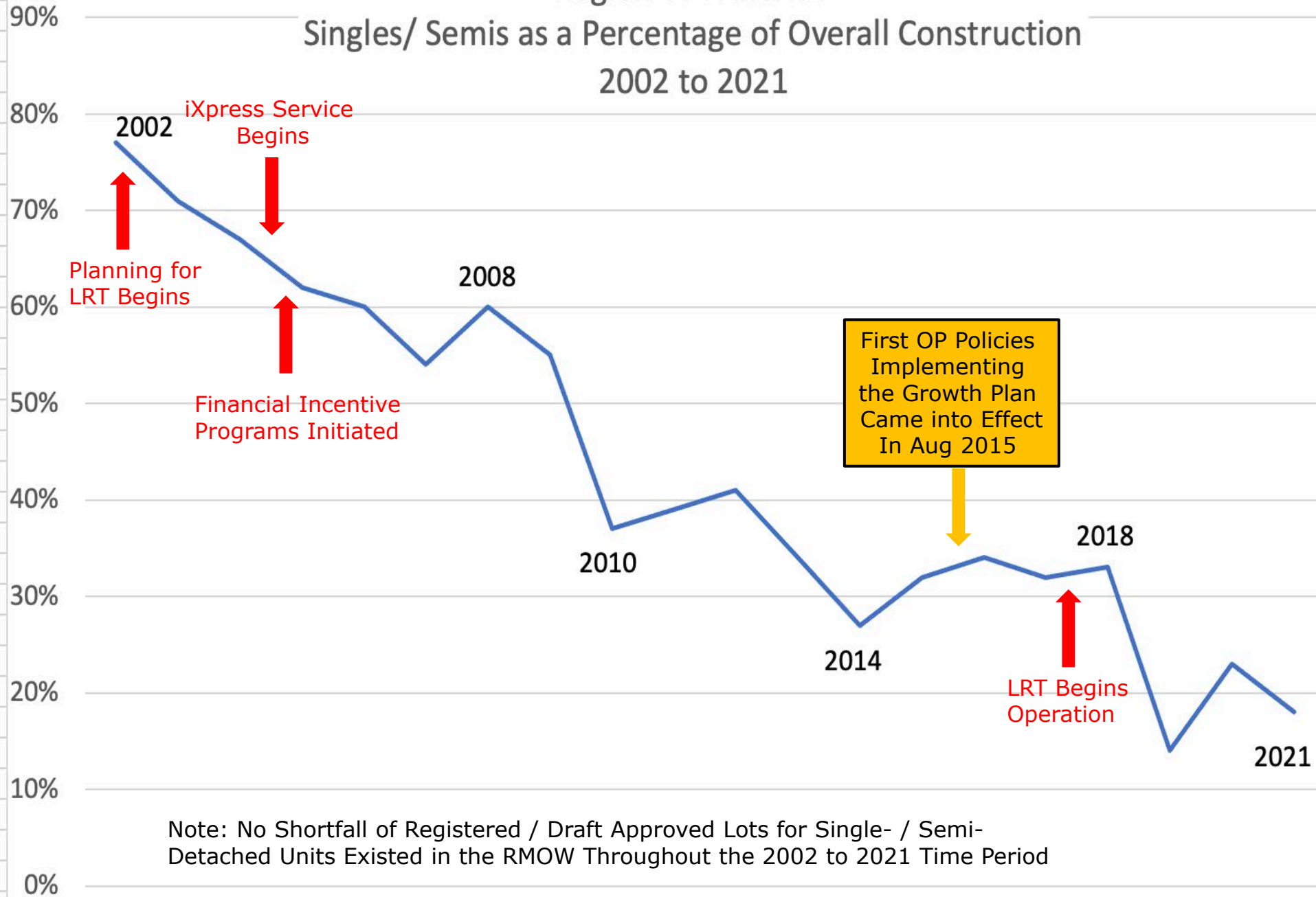
... the forecasting methodology
no longer reflects the future
marketplace

... the market is changing

Region of Waterloo Singles/ Semis as a Percentage of Overall Construction 2002 to 2021



Region of Waterloo Singles/ Semis as a Percentage of Overall Construction 2002 to 2021



Halton Region

Sustainable Halton Report 2009

2009 Market Forecast for 2006 to 2031:

Single- and Semi-Detached – **59 %**

Townhomes – 28 %

Apartments – **13 %**

“To achieve the Growth Plan target for 40% intensification, the housing mix will need to shift to accommodate approximately 31% apartments in the 2016 to 2031 period”

“... this major change in housing preferences represents a significant shift in social and cultural values related to housing. It is unclear how or why this shift would occur in the Halton housing market ...”

Halton Region

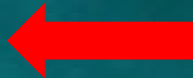
2009 Market Forecast (2006 to 2031) versus Actual (2011 to 2021)

Actuals 2011 to 2021:

Single- and Semi-Detached – 35 %

Townhomes – 30 %

Apartments – 34 %



Growth Plan Forecasts

GTAH

(2011 to 2021)

2005 GP Forecast:

Single- and Semi-Detached – **47 %**

Townhomes – 17 %

Apartments – **36 %**

2020 GP Forecast:

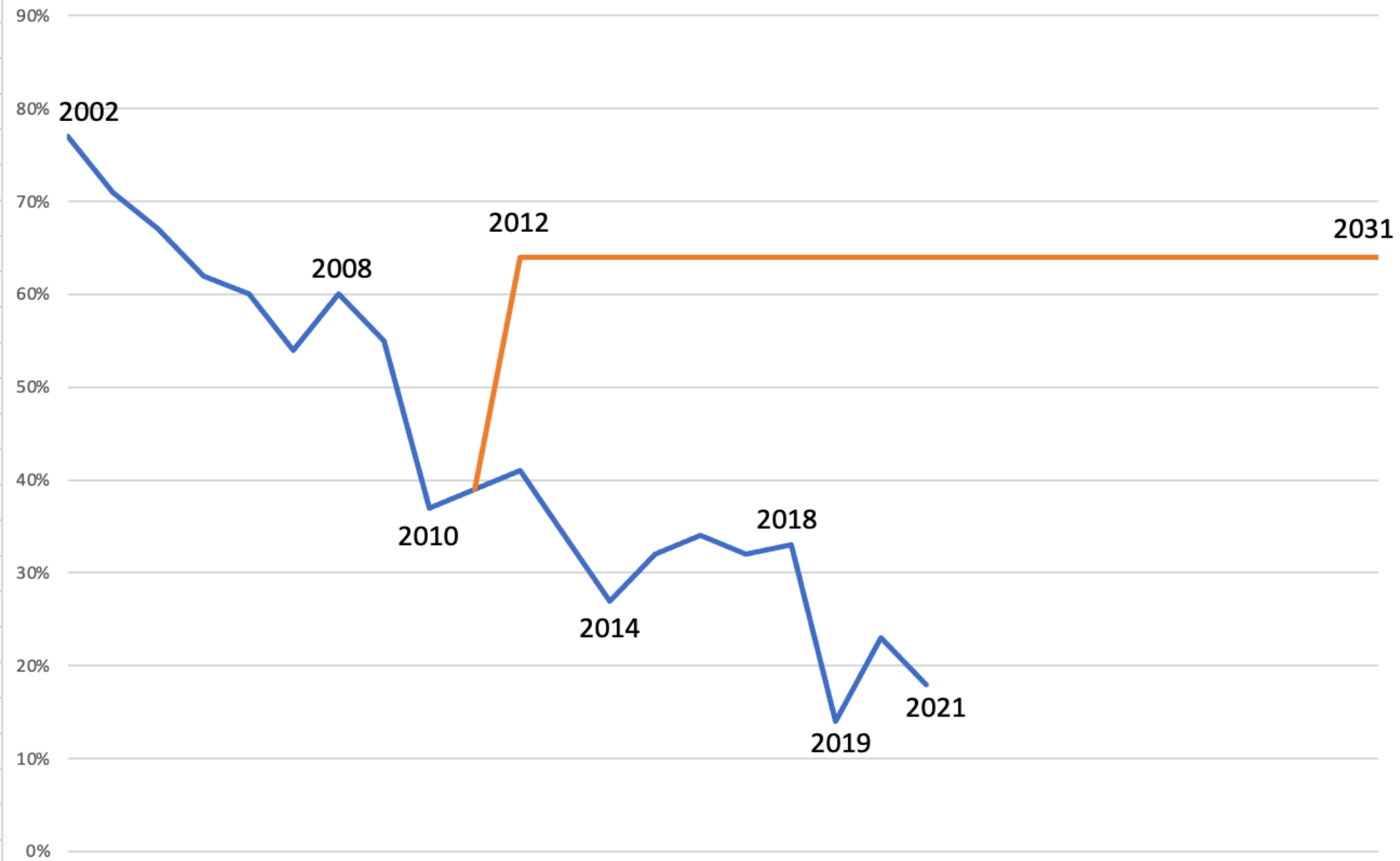
Single- and Semi-Detached – **28 %**

Townhomes – 16 %

Apartments – **57 %**

... the forecasting methodology no longer reflects the future marketplace

Region of Waterloo RMOW Actuals versus 2012 Market Demand Forecast Percent Singles and Semis **Constructed** / **Forecast**



Halton Region

Actual (2011 to 2021) versus Market Forecast (2021 to 2051)

Actuals 2011 to 2021:

Single- and Semi-Detached – **35 %**

Townhomes – 30 %

Apartments – **34 %**

Market Forecast for 2021 to 2051:

Single- and Semi-Detached – **50 %**

Townhomes – 25 %

Apartments – **25 %**

Growth Plan Forecasts GTAH (2011 to 2021) versus (2021 to 2051)

2020 GP Forecast (2011 to 2021):

Single- and Semi-Detached – 28 %

Townhomes – 16 %

Apartments – 57 %

2020 GP Forecast (2021 to 2051):

Single- and Semi-Detached – 40 %

Townhomes – 18 %

Apartments – 43 %

Growth Plan Forecasts GGH (2011 to 2021) versus (2021 to 2051)

2020 GP Forecast (2011 to 2021):

Single- and Semi-Detached – 33 %

Townhomes – 17 %

Apartments – 50 %

2020 GP Forecast (2021 to 2051):

Single- and Semi-Detached – 45 %

Townhomes – 18 %

Apartments – 37 %

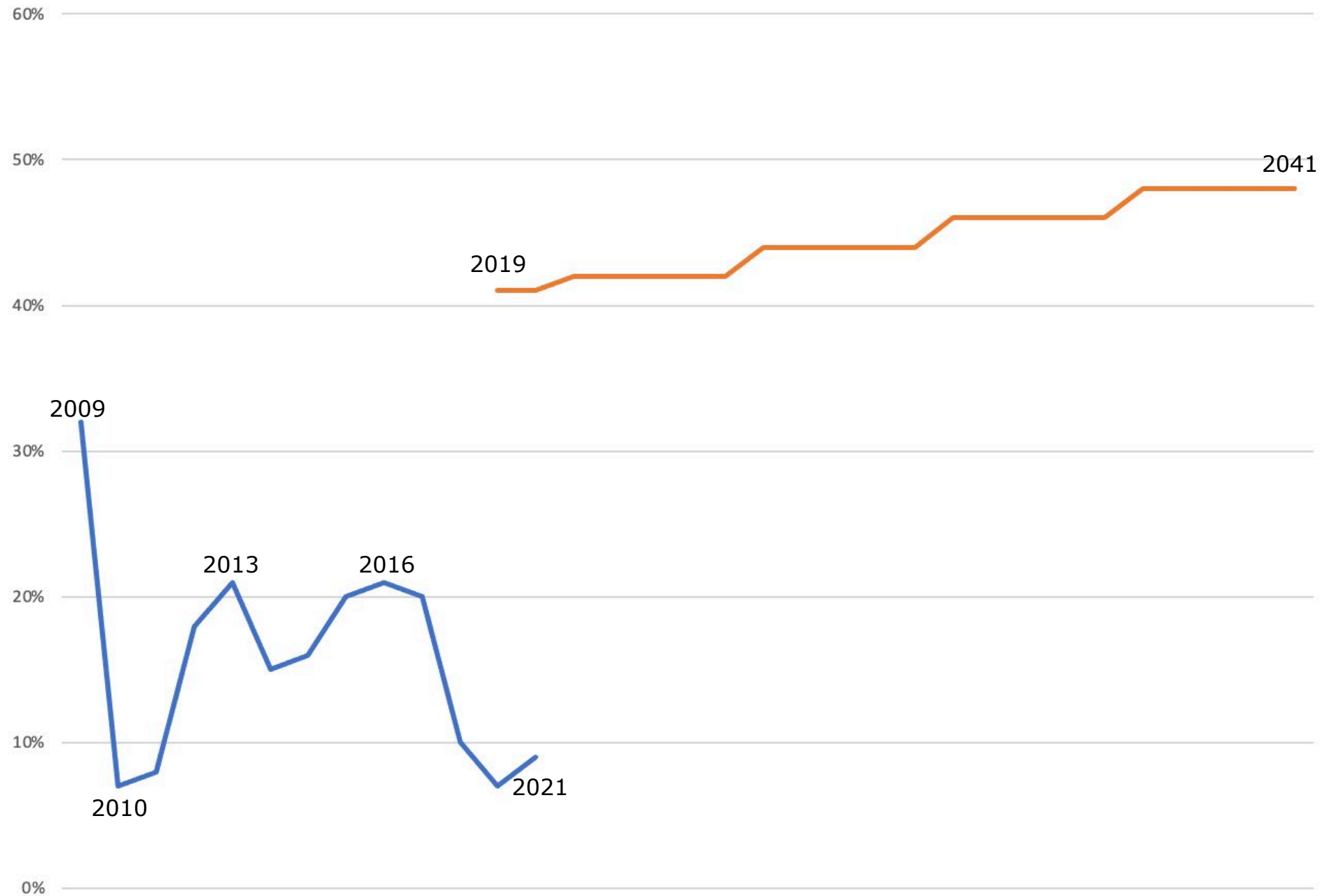
2020 Growth Plan Forecast Background Report (housing-by-type forecast)

August 2020 GPF Background Report		
	Percent Singles/Semis	% of New Units
	2021 to 2051	in the DGA 2021 to 2051
Toronto	5.3%	0.0%
Peel	50.8%	50.0%
York	47.4%	50.0%
Durham	55.7%	50.0%
Halton	50.1%	50.0%
Hamilton	52.2%	50.0%
Northumberland	72.0%	60.0%
City Peterborough	62.7%	60.0%
County Peterborough	74.3%	60.0%
Kawartha Lakes	83.9%	60.0%
Simcoe	69.8%	60.0%
Barrie	64.3%	50.0%
Orillia	64.7%	50.0%
Dufferin	66.4%	60.0%
Wellington	76.4%	60.0%
Guelph	30.9%	50.0%
Waterloo	43.6%	50.0%
Brant	67.1%	60.0%
Brantford	53.6%	50.0%
Niagara	55.2%	50.0%
Haldimand	78.3%	60.0%
GGH	44.9%	42.1%
GTHA	39.5%	37.4%
OR	58.0%	53.5%

- In 18 out of 21 municipalities, the number of singles / semis forecast exceeds the total number of housing units permitted in the DGA if the intensification targets are met

Actual 2009 to 2021 (fh) / 2020 DC Forecast 2020 to 2041

Percent Singles and Semis **Constructed** / **Forecast**



Why is this Important?

Used in:

- allocation of population to municipalities
- DC By-laws
- determination of land needs

Impact of the Aging Population

The Impact of the Aging Population (Region of Waterloo)



Pre-Boomer



Baby Boomer

- The early Baby Boomers sold their singles at a rate 65% higher than the previous generation

The Impact of the Aging Population (Region of Waterloo)



- 68% of the owners of singles in 2016 will be over 80 years of age in 2051 (77,535 singles)
- 88% will be over 70 years of age in 2051 (99,965 singles)
- Approximately 17,500 new singles have been built since 2006

The Impact of the Aging Population



- Singles occupied by seniors represent massive underutilized capacity in our urban areas
- Need to focus on creation of housing appropriate for seniors at various stages of retirement
- Age in neighbourhood rather than age in place is the way of the future

Looking Ahead

- The real problem we face is not a shortfall in single-detached units, it is a shortfall in two and three bedroom apartments
- While aging seniors and younger people serve as a market for smaller units, families require more
- Not to panic, this is all part of the maturing in the changing marketplace

Conclusions

- We are planning for too many singles
- Results in unnecessary expansions to urban areas, leading to planning for the wrong type of development in the wrong location
- Results in under collection of DC revenues
- Aging seniors represent a huge market opportunity for the development of a continuum of age appropriate housing, thereby also freeing up singles for younger families
- Now lets solve the two and three bedroom apartment shortfall ...

MEET THE CHIEF PLANNERS

Dinner Roundtable Discussions

Balancing Act: Can we balance a compact, low carbon vision for the region with massive population growth, affordability and liveability?

Getting to Transit Oriented Development



Yvonne Yeung
City of Brampton



ULI-FIG Getting to Transit Oriented Communities Initiative

A 'Living Plan' Accelerated Collaboration Model to Deliver a Greener, more Affordable & Equitable City Region



**NET-ZERO EMISSIONS
IN CANADA BY 2050**



The growing community at Uptown Brampton TOC

22 million SF development

37,000 population growing to over 100,000

Hurontario LRT arriving in 2 years

2022



2/3
of Canadian
lives in auto-
dependent suburbs
source: Queens
University

Knit neighbourhoods together with the 'Living Plan'

Creek to creek connections

Neighbourhood parks & hubs at the hearts

Family-friendly community streets

2025-2030+

Uptown
Hurontario-Steeles
North Precinct

Uptown
Community Hub
2027

Mobility Hub

Steeles Rapid Transit

Uptown
Hurontario-Steeles
South Precinct

Hurontario LRT
Light Rail Transit
2024

TOC
Cohort
30+ stakeholders

65+
rapid transit
served
neighbourhoods
in Brampton

Sheridan College



Integrate soft infrastructure with a 'hub prototype'

Walk-to facility with long term tenancy

Lifelong learning programs

Accelerate capital delivery to lower cost

2027

24hr
indoor &
outdoor facility
in TOC

Walking
School Bus
no surface
parking lot

Health & Social Hub

- Health Clinics
- Agency Spaces
- Exhibition Venue
- Meeting Rooms

Library & Education Hub

- Elementary School
- Daycare
- Library
- Study Space

Recreation & Food Hub

- Community Kitchen
- Culinary & Pop-ups
- Gymnasium
- Dance Studios
- Lounge & Event

Arts, Culture & Design Hub

- Performance Space
- Exhibition Venue
- City Design Centre
- Cultural Workshop
- Agencies Showroom

Technology & Innovation Hub

- Lecture Hall & Event
- Co-work Space
- Start-ups and Accelerators
- Mentoring Space

Green & Ecology Hub

- Urban Agriculture
- Eco-learning Garden
- Outdoor fitness
- Green energy connections

Integrate active mobility with 'main walk prototype'

Car-free living as an affordable way of life

Deliver child-friendly arterials and intersections from the outset



2024+

Signage

Zero
minimum
parking
in TOC

1/3
of GHG
emission is from
transportation

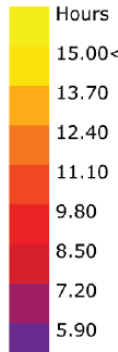
source: Government
of Canada

Coordinate development to extend 'outdoor season'

Human-scale design

Access to daylight & views

Optimize outdoor comfort & building energy performance

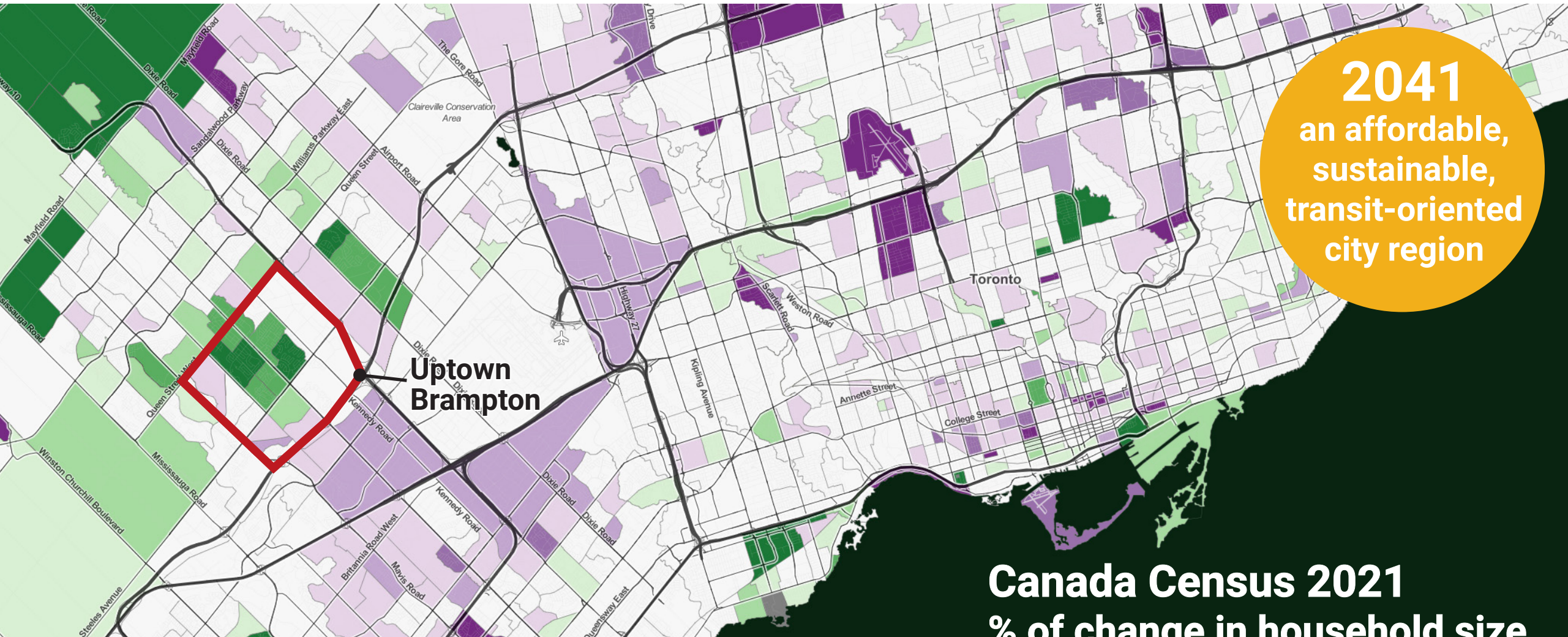


1/2
of GHG
emission is from
buildings

source: Government
of Canada

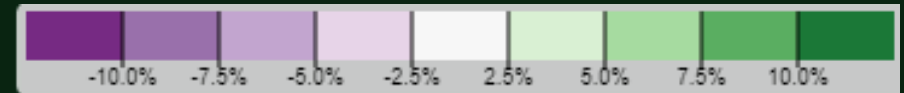
Make the shift to deliver family-friendly TOCs

Prioritize hard and soft infrastructure along rapid transit lines 'Living Plan' collaboration to accelerate delivery



2041
an affordable,
sustainable,
transit-oriented
city region

Canada Census 2021
% of change in household size



NET-ZERO EMISSIONS
IN CANADA BY 2050



MEET THE CHIEF PLANNERS

Greater Golden Horseshoe Panel



Moderator: Andrew Garrett
Senior Principal, Real Estate,
Investment Management
Corporation of Ontario



Gregg Lintern
Chief Planner and
Executive Director,
City of Toronto



Karla Avis-Birch
Chief Planning Officer,
Metrolinx



Lisa Prime
Chief Planner,
City of Cambridge



Stephen Robichaud
Chief Planner and
Director of Planning,
City of Hamilton

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