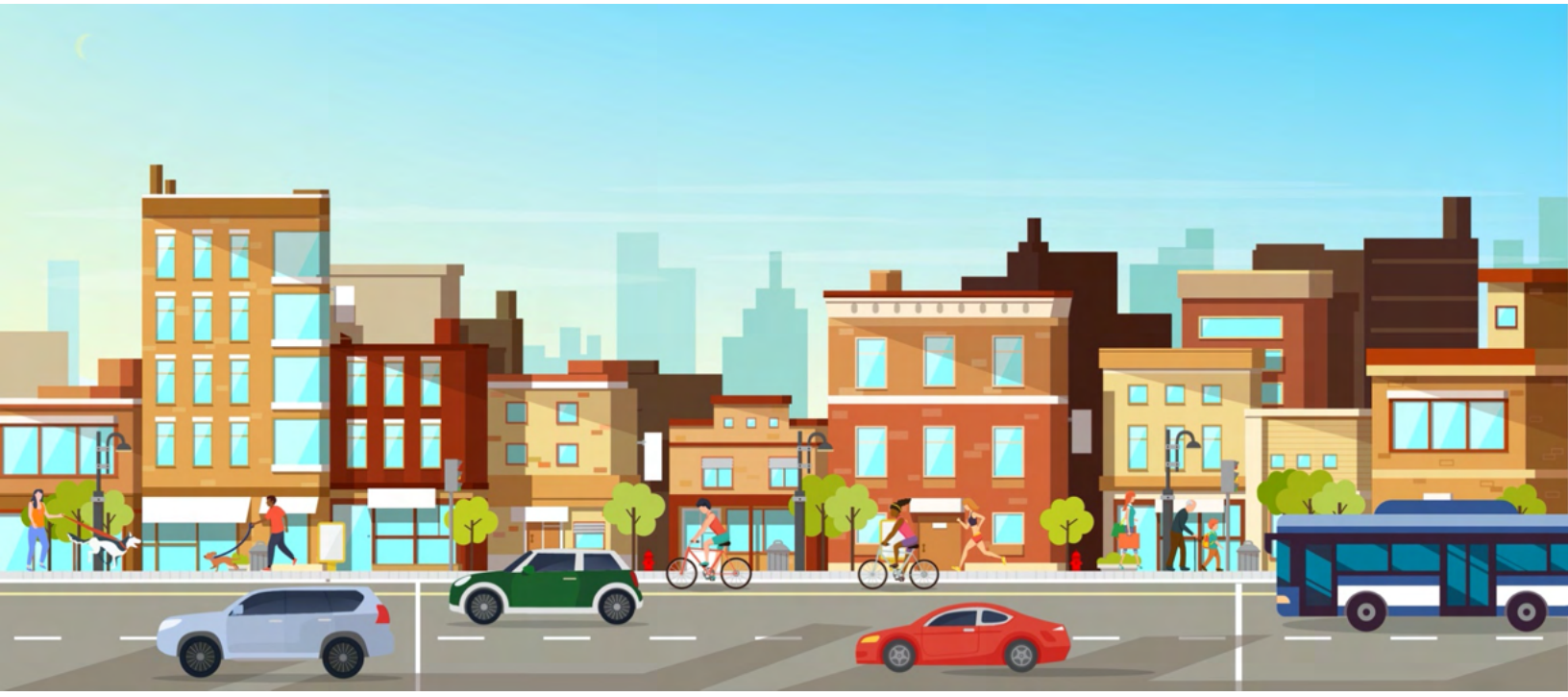

HOUSING INTENSIFICATION STUDY TECHNICAL REPORT

Chapter 2 of the Region of Durham Growth Management Study: Land Needs Analysis

August 24, 2021

Watson & Associates ECONOMISTS LTD.

URBAN STRATEGIES INC.

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Executive Summary

In 2018, the Region launched *Envision Durham,* the Municipal Comprehensive Review (MCR) of the Regional Official Plan (ROP). The objectives of the MCR are to assess the following:

- How and where the Cities and Towns in Durham Region may grow;
- How to use and protect Durham's land and resources;
- What housing types and job opportunities are needed for residents; and,
- How people and goods will move across Durham Region and beyond.

The Durham Growth Management Study (GMS) is a key component of *Envision Durham,* providing the technical analysis and studies to determine where and how forecast population and employment growth will be accommodated in the region by 2051. Phase 1 of the GMS focuses on preparing a Land Needs Assessment (LNA) which will determine the region's urban area land needs in order to accommodate forecast growth. It builds on the background research and preliminary observations in the *Envision Durham* Discussion Papers, which addressed the following topics: Agriculture and Rural System; Climate Change and Sustainability; Growth Management, including discussion of the Urban System and LNA; Environment and Greenlands System; Transportation System; and Housing Policy Planning. Upon the completion of the LNA, Phase 2 of the GMS will assess the most appropriate locations for any required Settlement Area Boundary Expansion.

The GMS forms a key component of the Region's MCR process under section 26 of the *Planning Act,* and is to be consistent with the Provincial Policy Statement, 2020 (PPS, 2020), and to conform with the A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, as amended (Growth Plan)[1]. Building on the provincial policy framework, the GMS includes a comprehensive analysis of long-term population, housing, and employment growth, as well as associated urban land needs.

Urban Strategies Inc. (USI) and Watson & Associates Economists Ltd. (Watson) were retained by the Region to undertake the Growth Management Study. The outcomes of the analysis undertaken in Phase 1 are documented in a series of four Technical Reports and a summary Land Needs Assessment report.

The purpose of the Housing Intensification Study Technical Report is to document the capacity for accommodating residential and mixed-use growth within the region's built-up area (BUA)[2], determine the intensification potential of candidate strategic growth areas (SGAs), and provide

[1] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation 2020, Ontario, hereinafter referred to as the Growth Plan, 2019

[2] Built-up Area is defined within the Growth Plan 2006 as "All land within the built boundary". Built Boundary is defined as "The limits of the developed urban areas as defined by the Minister of Public Infrastructure Renewal in accordance with Policy 2.2.3.5".

policy recommendations, including recommendations on refinements to the Region's Urban Structure and intensification targets. The Housing Intensification Study has been informed by findings contained in the Region-Wide Growth Analysis Technical Report, in particular historical trends and the overall regional population and employment growth forecast to 2051.

Region-Wide Growth Analysis Technical Report - Background

As discussed in the Region-Wide Growth Analysis Technical Report, Durham Region is expected to experience rapid population, housing and employment growth between 2016 and 2051. The following summarizes the population, housing and employment forecast for Durham Region:

- By 2051, the province forecasts that Durham Region is to plan for a population of 1,300,000.[3, 4] This represents an increase of approximately 634,200 persons between 2016 and 2051, or an average annual population growth rate of 1.9% during this time period;
- Accommodating the 2051 Forecast population growth in Durham Region will require approximately 240,900 new households between 2016 and 2051, or nearly 6,900 new households annually; and
- To meet the 2051 employment Forecast, the Region will need to plan for an employment base of 460,000 jobs. This represents an increase of approximately 236,400 jobs between 2016 and 2051, or an average annual growth rate of 2.1% during this period.

To adequately accommodate future housing demand for the full range of demographic and socio-economic groups, a range of new housing will be required in terms of built form, location, accessibility and affordability across the Region's designated greenfield area (DGA), SGAs, and other residential intensification areas within the BUA. Within this range of housing, a significant increase in the proportion of medium and high-density housing units is forecast to 2051.

Summary of Key Intensification Findings

The Housing Intensification Study has resulted in five key findings. First, based on an analysis of the intensification potential across the Region of Durham, the minimum intensification target of 50% of the growth to 2051 is appropriate, can be met, and can potentially be exceeded. The Housing Intensification Study determines that there are ample opportunities and land supply (up to 177,700 units) to accommodate intensification over the long term and at full build out. By

[3] Population forecast includes the net Census undercount which is estimated at 4.0% for all periods. The Census undercount represents the net number of permanent residents who are missed (i.e. over-coverage less undercoverage) during Census enumeration in accordance with Statistics Canada.
[4] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation 2020.

2051, at a rate that would meet the Growth Plan minimum target of 50%, a total of 106,700 units can be accomodated. However, it is recognized that achieving such intensification on a sustained and ongoing basis will represent a long-term shift in built form, housing mix and unit construction in Durham. Achieving a greater amount of growth in the BUA beyond 50% could be possible subject to market preference, sociodemographic or other factors.

Second, focusing growth in locations that align with the Provincial definition of SGAs, particularly the Urban Growth Centres (UGCs), Regional Centres and the Major Transit Station Areas (MTSAs), has the greatest potential to achieve or exceed the Region's intensification target but also to align with broader Regional policies and objectives. These include aligning with land use planning policy, transit-supportive development, and infrastructure planning, to achieve cost-effective, sustainable development patterns, optimize transit investments and increase mobility choice.

Third, the introduction of MTSAs as a new component of the regional urban structure represents a strategic opportunity to accommodate a significant amount of growth in close proximity to existing and planned GO stations and service. Within the MTSAs, there is potential for approximately 59,000 residential units, of which 48,300 units would be considered intensification (See Figure ES-1 below). The MTSAs have the potential to accommodate 45% of the new residential units required to achieve the minimum intensification target by 2051 (106,700). Durham Region is not planning for all MTSAs to reach their full growth capacity within this timeframe. However, the potential for intensification within the MTSAs represents an opportunity to accommodate growth that supports the objectives of Transit Oriented Development as outlined in the Region's *MTSA Directions Report*.

Figure ES-1: Total MTSA Growth Potential Supply (units)

Total MTSA Growth Potential Supply (units)						
MTSA	**Soft Sites[5]**	**Pipeline[6]**	**(Net out*)**	**Total Potential Supply**	**(DGA)**	**Total Potential Intensification**
Pickering	6,300	3,800	(500)	9,600	0	9,600
Ajax	5,000	1000	0	6,000	0	6,000
Whitby	6,600	600	(100)	7,100	0	7,100
Thornton's Corners	5,300	0	0	5,300	0	5,300
Central Oshawa	8,200	350	0	8,600	0	8,600

[5] Soft sites are parcels or lots that owing to their location, size or feature are candidates for future development. Soft sites and their selection are described in greater detail in Chapter 5.

[6] Pipeline refers to the active development in the region at the time of this study. Active development refers to any development or planning application prior to the issuance of a building permit. For the purpose of the study, all pipeline projects were incorporated without adjustment to the number of housing units and/or non-residential floorspace.

MTSA	Soft Sites	Pipeline	(Net out)	Total Potential Supply	(DGA)	Total Potential Intensification
Courtice	13,100	0	0	13,100	(8,400)	4,700
Bowmanville	8,000	1,300	0	9,300	(2,300)	7,000
Total**	**52,500**	**7,100**	**(600)**	**59,000**	**(10,700)**	**48,300**

*Net out refers to the number of units replaced through redevelopment
**Figures rounded to nearest hundred; Table may not add due to rounding

The capacity for growth and intensification in Regional Centres and certain Regional Corridors is also significant (118,100 units), with varied levels of capacity distributed across the Region. Certain Regional Centres and Corridors have the capacity to play a more significant role in accommodating growth and intensification, as demonstrated in Chapter 7. In particular Pickering and Oshawa, have the potential to accommodate the greatest proportion of intensification at 25% and 27% respectively. Recommendations related to enabling growth in the Regional Centres and Corridors with the greatest growth potential are included in Chapter 8.

Fourth, while at the regional level there is significant potential to grow through intensification, the intensification potential varies across area municipalities. Given the distinct characteristics between the urban and rural areas of the region, the vast majority of potential for intensification is in the southern Lake Ontario shoreline municipalities (98% of intensification potential). Although intensification potential is much more limited in northern municipalities, there is potential for context appropriate rate and scale of infill development in all area municipalities across Durham Region.

Finally, to support and enable intensification and achieve the intensification target, the alignment of regional policies and initiatives related to land use, built form, infrastructure and economic development will be key. Therefore, a series of policy recommendations related to enabling intensification are provided in Chapter 8

Figure ES-2: Regional Potential Intensification Supply Summary by Area Municipality

Regional Intensification Potential Summary		
Municipality	**Units**	**Share of Regional Potential Intensification Supply**
Pickering	45,100	25%
Ajax	30,500	17%
Whitby	31,900	18%
Oshawa	47,600	27%
Clarington	19,700	11%
Total southern Lake Ontario Municipalities	174,800	98%
Brock	360	0.2%
Uxbridge	620	0.4%
Scugog	1,900	1.1%
Total northern municipalities	2,900	1.7%
Total	**177,700***	**100%****

Source: Urban Strategies Inc., 2021.
*Column rounded to nearest hundred
**Column does not add up to 100% due to rounding.

Housing Intensification Technical Report

1. Introduction

As noted in the Region-Wide Growth Analysis Technical Report, Durham Region is planning to accommodate forecasted growth of 1.3 million people and 460,000 jobs by 2051. This rate of growth is significant – representing an annual population growth rate of 1.9% which is significantly higher than experienced in recent years. A key component of accommodating growth over the coming decades in Durham Region will be through residential intensification. This analysis demonstrates that the Region will be able to achieve a recommended intensification target of 50%.

This Housing Intensification Study Technical Report provides a summary of the analysis of potential intensification within the Region's Built-Up Area ("BUA") – which are lands within existing urban settlement areas that were considered to be in some stage of urbanization in 2006. This Technical Report also provides recommendations on how and where to plan for intensification, including minimum targets and planning policies to guide the form and location of intensification. Durham Region has the potential to accommodate 177,700 new units through intensification and 317,500 people in the Built-Up Area in full build out over the long term. However, between 2022 and 2051, the analysis demonstrates that the Region's BUA can accommodate 106,700 units and a population of approximately 247,000 people. Planning for intensification at higher densities needs to be aligned with planning for high levels of amenity and transportation choice, and sustainable infrastructure and services.

In 2018, the Region launched *Envision Durham,* the Municipal Comprehensive Review (MCR) of the Regional Official Plan (ROP). The objectives of the MCR are to assess the following:

- How and where the cities and towns in Durham Region may grow;
- How to use and protect Durham's land and resources;
- What housing types and job opportunities are needed for residents; and,
- How people and goods will move across Durham Region and beyond.

The Durham Growth Management Study (GMS) is a key component of *Envision Durham,* providing the technical analysis and studies to inform where and how forecast population and employment growth will be accommodated in the region by 2051. Phase 1 of the GMS focuses on preparing a Land Needs Assessment (LNA) which will establish the region's urban area land need in order to accommodate forecast growth.

The outcome of the first background analysis phase of the GMS was the *Durham Growth Management Study: Growth Opportunities and Challenges Report* [7] *(Opportunities and*

[7] See Report #2021-P-7 – Envision Durham – Proposed Policy Directions, File: D12-01

Challenges Report), which sets the context for the assumptions, analysis and recommendations or responses in the subsequent growth analysis and Technical Reports.

The *Opportunities and Challenges Report* provides an overview of the opportunities and anticipated challenges to achieving forecasted growth over the next three decades in Durham Region. It established the foundation for undertaking the LNA by providing essential context, discussing impacts from broader demographic and economic trends, local growth and development trends, and other factors that will affect growth. By assessing these topics and themes, observations and recommendations were provided to help guide and direct Durham's long-term forecast population and employment growth.

Relevant recommendations from the *Opportunities and Challenges Report* are included in Chapter 8

1.1. Technical Report Purpose and Context

The purpose of this Housing Intensification Study Technical Report (this report) is to provide a detailed description of the methodology, findings and recommendations of the Housing Intensification Study ("this study"). This study evaluates the potential supply and demand for housing by type within the BUA in Durham Region to 2051. The outcome of this analysis is the identification of intensification potential, a composite of 'soft site' analysis across the region, and aligning the soft site analysis with the forecast housing demand by unit types within the BUA. These results were then measured against the intensification requirements of the Growth Plan.

This report outlines the potential for intensification across Durham Region and within the eight area municipalities. Throughout the study, ongoing consultation with area municipal staff and the Regional departments has informed the methodology and analysis. Policy recommendations that are key to enabling growth through intensification are also provided and discussed.

The LNA is detailed in four Technical Reports that act as chapters in one cohesive Report. The findings of the four Technical Reports are summarized in the LNA Summary Report. The organization of Technical Reports reflects the revised LNA methodology as issued by the Ministry of Municipal Affairs in August 2020.

The Technical Reports are sequential and are designed to be read in the following order.

1) Region-Wide Growth Analysis

The purpose of the Region-wide Growth Analysis Technical Report is to analyze the region's long-term population, housing and total employment growth potential based on current data, to extend the

region's population forecast to 2051 to implement the Growth Plan Schedule 3 forecasts, as an input into the Land Needs Assessment (LNA).

2) Housing Intensification Strategy

The purpose of the Housing Intensification Strategy Technical Report is to evaluate growth and intensification capacity within Durham's delineated Built-Up Area (BUA).[8] This Technical Report provides dwelling unit supply by housing type for areas within Durham that may be considered Strategic Growth Area (SGA) as defined by the Growth Plan, aligned with the forecast-based demand for housing type and policy recommendations to determine forecasted levels of intensification across Durham Region.

3) Employment Strategy

The purpose of the Employment Strategy Technical Report is to assess the region's capacity to accommodate forecast employment growth to the year 2051. This is informed by an employment land policy review, assessment of employment trends, employment land supply analysis, employment forecast to 2051, and a land needs analysis to determine the regional Employment Area land requirement to 2051. This Technical Report will identify strategic policy recommendations for the region's Employment Areas, provide recommendations on Employment Area conversion requests, provide the necessary background for the future delineation of Employment Areas, and establish employment density targets.

4) Community Area Land Needs Analysis

The purpose of the Community Area Land Needs Analysis Technical Report is to analyze the region's existing Designated Greenfield Area (DGA) land densities as well as assess the region-wide DGA Community Area land needs to the year 2051. This land needs analysis is informed by forecast population and employment growth as well as density trends associated with greenfield lands.

1.2. Technical Report Organization

This Technical Report is organized as follows:

- The Executive Summary provides highlights of the housing intensification analysis including a summary of key findings.
- Chapter 1 provides an introduction, purpose, summary background, policy context, and objectives for the study.
- Chapter 2 outlines the background, Provincial and Regional policy context, population and housing forecast to 2051, and base mapping context.

[8] The delineated Built-Up Area was defined in the Growth Plan as the extent of development on June 16, 2006.

- Chapter 3 summarizes the demographic and socio-econimic drivers of housing intensification in the Region of Durham
- Chapter 4 provides the Region of Durham Housing Intensification Forecast
- Chapter 5 defines the intensification study methodology, including soft site selection, assumptions, and typologies
- Chapter 6 summarizes the study process, describing the steps from soft site selection to final outputs.
- Chapter 7 provides findings of the study regarding long-term potential residential intensification supply and demand.
- Chapter 8 outlines key policy recommendations
- Chapter 9 provides conclusions and next steps
- Appendices

1.3. Housing Intensification Study Objectives

The objective of this study is to assess the potential to accommodate growth through residential intensification across Durham Region by 2051. The Growth Plan requires Durham Region to achieve a minimum of 50% of the total residential growth occurring annually between 2022 to 2051 through intensification. If it can be demonstrated that this cannot be achieved, Durham Region may request an alternate target for intensification.

The Housing Intensification Study provides evidence-based data on the number, location and type of housing that can be accommodated across the BUA and, in more detail, within the components of the Regional Structure that warrant consideration as Strategic Growth Areas (SGAs) such as UGCs, MTSAs, Regional Centres, Waterfront Places and Regional Corridors. The identified growth potential within the BUA has been used to determine an appropriate recommended regional intensification target, inform how and where such intensification growth should be focused, and can be used to inform how the Region should plan for infrastructure investments to support this future growth. As a key input to the *Envision Durham* process, this study will also help inform refinements to growth management policies related to SGAs, Urban Structure, and infrastructure related policies.

2. Policy Background and Context

This chapter provides an overview summary of provincial and regional policies related to accommodating growth and intensification. This not an exhaustive review of all policies relating regional growth and the LNA, but rather it is intended to provide a general context for the methodology, analysis and recommendations.

2.1. Provincial Policy Context

Planning in Ontario is guided by the framework established by the Province of Ontario. The primary provincial documents that relate to growth management and the LNA are the Provincial Policy Statement, 2020, and the Growth Plan 2019, as amended by Amendment 1: A Place to Grow. The relevant policies, as they apply to this study, are summarized below.

2.1.1 **Provincial Policy Statement, 2020**

The Provincial Policy Statement, 2020 (PPS) provides policy direction on matters of provincial interest related to land use planning and development. The current PPS, issued under the authority of section 3 of the *Planning Act,* came into effect on May 1, 2020. Decisions made by the council of a municipality or region "shall be consistent" with the PPS.

The PPS recognizes that long-term prosperity and social well-being of Ontario depends upon planning for strong, sustainable and resilient communities for people of all ages, a clean and healthy environment, and a strong and competitive economy. This vision informs the general goals of planning for growth and the basis for the LNA.

The PPS directs that efficient development patterns optimize the use of land, resources and public investment in infrastructure and public service facilities. This Housing Intensification Study identifies the growth potential in the BUA, in particular within canddiate SGAs, but also recognizes that planning for a range of housing types and densities can contribute to keeping Durham strong and competitive economically and that aligning growth with public investment in infrastructure, services and transit is consistent with the PPS.

The PPS directs that Ontario's long-term prosperity, environmental health and social well-being depends on wisely managing change and promoting efficient land use and development patterns. Efficient land use and development patterns support sustainability by promoting strong, livable, healthy and resilient communities, protecting the environment and public health and safety, and facilitating economic growth.

This study can also be used to support the Region in planning for the necessary infrastructure and public service facilities to meet projected growth in population and jobs.

The analysis recognizes the need to accommodate an appropriate market-based range and mix of residential types, employment and other uses to meet long-term needs. Low, medium and high-density typologies have been applied across the region to reflect a range of housing types, and changes to this mix over time. This data is balanced against economic and demographic factors related to housing types to ensure the market-based demand is satisfied.

2.1.2 **Provincial Growth Plan for the Greater Golden Horsehoe[9]**

The Growth Plan sets out where and how growth will occur across the Greater Golden Horseshoe (GGH) and all planning decisions are required to conform to it. The Growth Plan provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. Relevant aspects of the Growth Plan for this study include the following:

- Growth will be directed to settlement areas; it will be focused to SGAs, locations where higher-order transit exists or is planned, and areas with existing or planned public services facilities (2.2.1.2);
- Municipalities should be planned to develop as complete communities with a diverse mix of land uses, including employment and residential, and convenient access to local stores, services, and public service facilities;
- Population and employment growth are to be accommodated while reducing dependence on the automobile through the development of mixed-use, transit-supportive, pedestrian-friendly urban environments; and
- Minimum density targets have been provided to the horizon of the Growth Plan. The Growth Plan establishes that:
    - A minimum of 50 per cent of all residential development occurring annually will be within the delineated BUA. Although Councils may request an alternative to the target where it is demonstrated that this target cannot be achieved and that the alternative target will be appropriate given the size, location and capacity of the delineated built-up area.[10]
    - Urban Growth Centres, identified as Pickering and Oshawa in Durham, will be planned to achieve a minimum density target of 200 residents and jobs combined per gross hectare by the year 2031.[11]
    - MTSA, served by GO Transit will be planned to achieve a minimum density target of 150 residents and jobs combined per gross hectare.[12]

[9] On August 28, 2020, the Province released Amendment 1 to the Growth Plan which has been incorporated into an Office Consolidation, August 2020 document. The Growth Plan has been updated in conjunction with a revised outcome-based LNA methodology for the GGH. These documents are in effect as of August 28, 2020 and provide the basis for the LNA conducted for the Region of Durham.
[10] Growth Plan, Office Consolidation 2020, Policy 2.2.2.1a p 16.
[11] Growth Plan, Office Consolidation 2020, Policy 2.2.3 p 17.
[12] Growth Plan, Office Consolidation 2020, Policy 2.2.4 p 17.

- the designated greenfield area (DGA) minimum density target is required to be of not less than 50 residents and jobs combined per gross ha, but that a higher density target may be used if appropriate[13]. The DGA density target no longer includes employment lands as per the Growth Plan 2019.
- Upper- and single-tier municipalities, in consultation with lower-tier municipalities, the Province and other appropriate stakeholders, will each develop an employment strategy that includes establishing a minimum density target in Employment Areas.[14]

- All municipalities will develop a strategy to achieve the minimum intensification target and intensification throughout the delineated built-up areas. The intensification strategy will:
  - Identify strategic growth areas to support achievement of the intensification target and recognize them as a key focus for development;
  - Identify the appropriate type and scale of development in strategic growth areas and transition of build form to adjacent areas;
  - Encourage intensification generally throughout the delineated build-up areas;
  - Ensure lands are zoned and development is designed in a manner that support the achievement of complete communities;
  - Prioritize planning and investment in infrastructure and public service facilities that will support intensification; and
  - Be implemented through official plan policies and designations, updated zoning and other supporting documents.[15]

2.1.3 **A Place to Grow: Amendment 1 to Growth Plan 2019**

A significant change included with Amendment 1 to the Growth Plan was to extend the population and employment growth forecast horizon in Schedule 3 to 2051. The Growth Plan's Schedule 3 growth forecasts are to be treated as minimums, with higher growth forecast alternatives permitted by upper- and single-tier municipalities if determined appropriate through their respective MCR processes.[16] If an alternative growth forecast that exceeds Schedule 3 of the Growth Plan is utilized, the MCR must demonstrate that the alternate growth scenario meets the Growth Plan policy objective of accommodating a range of housing choices to meet market demand and the needs of current and future residents, as well as providing additional labour opportunities for the GGH labour market.[17] It should be noted that if higher forecasts

[13] As per the Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020, section 5.2.5, pp. 57 and 58.
[14] As per the Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020, section 2.2.7 pp. 23 and 24.
[15] Growth Plan, Office Consolidation 2020, Policy 2.2.2.3 p 15.
[16] Growth Plan, Office Consolidation 2020, Policy 5.2.4, p. 56.
[17] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Land Needs Assessment Methodology for the Greater Golden Horseshoe, p. 5.

are established by upper- and single-tier municipalities through their MCRs, they will not apply to provincial ministries and agencies.[18]

In 2016, Durham Region was home to approximately 666,000 people and 230,000 jobs [19]. Under the Growth Plan, Durham Region is required to plan for a minimum forecast population of 1,300,000 by 2051, an increase of roughly 634,000 people during the period from 2016 to 2051. With respect to employment, by 2051 the Region is required to plan for a minimum of 460,000 jobs, an increase of roughly 230,300 jobs during the period from 2016 to 2051.

The Growth Plan directs a minimum 50% of the forecasted population growth to be accommodated through intensification. The Growth Plan notes that the 50% is a minimum target, and Regions and municipalities are encouraged to achieve higher targets if desired. Acieving the 50% target translates to a minimum of 106,700 new units, housing 233,600 residents, in the BUA from 2022 to by 2051. See section 4.3.2, Census Housing Forecast by Structure Type, for a breakdown of unit mix to reach this outcome.

2.1.4 **Provincial Land Needs Assessment Methodology**

On August 28th, 2020 the current LNA Methodology came into effect, replacing the previous version that was in effect since May 4, 2018. Durham Region is required to use this Methodology in combination with the policies of the Growth Plan to assess the quantity of new urban land required to accommodate forecasted growth.

This study focuses on the potential housing supply within the BUA. The Methodology directs the Region to identify the potential for achieving the intensification target throughout the delineated BUA. The allocation of growth to the BUA must meet the minimum intensification target of the Growth Plan (50%), or another locally determined intensification target. In either case, the Methodology directs the Region to provide a breakdown of the units by type expected to achieve the target under current or anticipated conditions. The Region has worked collaboratively with the area municipalities to determine the potential to achieve housing by dwelling type through intensification within SGAs for the forecast period.

The methodology used in this Study meets the requirements for Component 4 as set out in the LNA Methodology for the Greater Golden Horseshoe (2020).

[18] Growth Plan, 2019, Policy 5.2.4.8, p. 57.
[19] 2016 population and employment figures are rounded. 2016 population base includes a Census undercount adjustment of approximately 3.4%.

2.2. Regional Policy Context

2.2.1 Existing Regional Planning Framework (Official Plan)

The Durham ROP was approved by the Ministry of Municipal Affairs and Housing (MMAH) in 1993 and the most recent consolidation occurred in 2020. The ROP provides a framework for where and how the region should grow until 2031.

This section provides an overview of policies from the ROP that relate to intensification within the BUA.

Section 1 – Basis Goals and Directions

The Official Plan opens with the following Basis in Section 1:

a) The population and employment forecasts for the Region to the year 2031 are 960,000 and 350,000 respectively, consistent with the 2006 Growth Plan for the Greater Golden Horseshoe;
b) Over time, the density of the Urban Areas will continue to increase;
c) Employment opportunities are essential;
d) There is a two-tier planning system in the Region; and
e) Natural resources need to be protected for future generations, and managed to be sustainable.

Following this Basis, the ROP establishes goals for the long-term outcome of Durham Region. goals that are relevant to intensification include:

- managing growth so that it occurs in an orderly fashion;
- living in harmony with the natural environment and heritage of the Region;
- developing the region to its economic potential and increase job opportunities for its residents; and
- creating healthy and complete, sustainable communities within livable urban environments for the enjoyment of present and future residents.

These goals are the desired long-term outcome from the ROP. In order to achieve these goals, the ROP establishes Directions, which provide medium-term objectives for developing the Region. Directions that relate to this study and report, as referred to earlier, include:

- encouraging developments that utilize land efficiently;
- protecting significant features and functions of the natural environment,
- increasing employment opportunities to create healthy and complete, sustainable communities that balance growth in population with growth in employment;
- encouraging the production of an increased mixture of housing by type, size and tenure in Urban Areas;

- creating Urban Areas that are people-oriented and support active transportation;
- developing the Region in a fiscally responsible manner;
- and coordinating and managing the development of the Region in a manner that is consistent with provincial planning policies.

Section 3 – Economic Development

Section 3 sets out the policies that provide direction for developing the Region to its fullest economic potential, to promote the development of healthy and complete, sustainable communities, having a balance of jobs and population, and diversifying the Region's employment base.

ROP policies direct that Regional Council shall:

1. foster a favourable climate for the economic development of the Region and shall promote the Region as a prime location for new business investment (Policy 3.2.1);
2. establish a target ratio of jobs to population of 50% (1 job for every 2 persons) for the Region as a means to support the development of healthy and complete, sustainable communities that provide a close live-work relationship for residents of the Region (Policy 3.2.2); and
3. facilitate the expansion and diversification of the economic base of the Region to create a balance between the various employment opportunities generated from Employment Areas, major office development and other sources of employment serving the needs of the Region's residents (Policy 3.2.3).

Section 4 - Housing

Section 4, Housing establishes the goal to provide a wide diversity of residential dwellings by type, size and tenure in Urban Areas to satisfy the social and economic needs of present and future residents of the Region.

More specifically, policies related to intensification include:

- Policies that will enable a wide variety of housing by type, size and tenure in Urban Areas shall be contained within area municipal official plans (Policy 4.2.1).

- Regional Council shall, in consultation with the area municipalities and the Provincial Government, undertake a comprehensive study examining methods of achieving higher residential densities in Urban Areas, such as development standards, performance standards and intensification opportunities, with such study to form the basis for more detailed policies to be incorporated into the Plan by amendment (Policy 4.2.5).

- Regional Council shall support opportunities to increase the supply of housing in Urban Areas through intensification, the adequacy of municipal services and the physical

potential of the housing stock. Housing intensification shall include, but not be limited to, the following (Policy 4.3.2):

a) the conversion of single detached dwellings into multiple residential units;
b) the conversion of industrial or commercial buildings, or portions thereof, into residential units, in accordance with Policy 8C.2.16 and other objectives of this Plan;
c) the creation of new residential units on vacant or underdeveloped lands through infilling in Urban Areas; and
d) the creation of residential units above commercial uses, with preference being given to development located adjacent to arterial roads and/or in close proximity to transit routes.

- In the preparation of area municipal official plans, Councils of the area municipalities shall ensure the inclusion of policies and designations to implement the intent of the Plan and the provisions of this Section and the following (Policy 4.3.9):
  a) policies and implementation procedures required to meet the objectives of the Provincial Policy Statement and this Plan, particularly with respect to housing types, density, intensification and affordability;
  b) policies for higher density, mixed use development in Regional and locals Centres and Corridors;
  c) maximum unit sizes;
  d) policies to permit the conversion of single detached dwellings into multiple units in Urban Areas;
  e) policies to preserve, improve, rehabilitate or redevelop older residential areas, which are in keeping with the cultural heritage resource policies of this Plan and the respective area municipal official plans; and
  f) policies which permit, subject to appropriate criteria and conditions, granny flats/garden suites as a temporary use through mechanisms such as temporary use by-laws and/or site plan control. However, within the Oak Ridges Moraine, granny flats/garden suites are only permitted in the Uxbridge Urban Area and in hamlets as designated on Schedule 'A' – Regional Structure.

Section 5 – Cultural, Health and Community Facilities, and Infrastructure

Section 5, Culture, Health, Community Facilities and Infrastructure, establishes goals which include accommodating opportunities for locating cultural, health and community facilities in the Region; and providing adequate Regional municipal services and enabling utilities to meet the existing and future needs of orderly growth in the Region in an environmentally and financially sound and efficient manner.

More specific policies related to intensification include that the Region shall give priority to the provision of municipal water and sewage services within Urban Areas to development and redevelopment proposals which produce an intensive and compact form of development (Policy 5.2.3).

Section 7 – Regional Structure

Section 7 – Regional Structure establishes goals which include

- creating a development pattern and policy directions to support the structural components for the Region and to minimize conflicts between such components;
- efficiently using the land, resources and finances of the Region, and
- promoting distinct, compact Urban Areas which support the development of healthy and complete, sustainable communities.

Section 7, Regional Structure, establishes the structural components of the Region, which is comprised of an Urban System, a Rural System, a Greenlands System and a Transportation System. The majority of growth will occur on lands located within the Urban System. The Rural System applies to agricultural lands and other rural areas and is not intended to accommodate significant growth. The Greenlands System applies to natural heritage areas and environmental features/systems, and the Transportation System is comprised of transportation networks such as roads, rail, and other transportation infrastructure.

Within the Urban System, there are distinct and compact Urban Areas, which are locations for significant growth within the Region. Policy 7.3.9 provides that Urban Areas will be planned to achieve the following growth management objectives on a Region-wide basis:

a) by 2015, and each year thereafter, accommodate a minimum 40% of all residential development occurring annually through intensification within built-up areas in;
b) develop greenfield areas with an overall gross density of 50 residents and jobs combined per hectare; and
c) accommodate a minimum 50% of all forecast employment in designated Employment Areas.

Section 7 also includes population, household and employment forecasts for each municipality in Durham (Policy 7.3.3). The municipal population forecasts includedistribution by Urban and Rural System. The current ROP allocates forecasted growth in 5-year increments to the year 2031.

Section 8 – Urban System

Section 8 is specific to the Urban System and includes policy directions regarding where and how urban growth should take place. Detailed policies for the various Urban System designations, including Living Areas, Employment Areas, and the hierarchy of centres, including Urban Growth Centres, Regional Centres, and Local Centres, as well as Regional Corridors and Local Corridors and Waterfront Places, are provided.

Section 8 goals include establishing an Urban System of distinct Urban Areas that are adaptable and able to evolve into healthy and complete sustainable communities that balance growth in population with growth in employment, developing people-oriented urban areas to

meet the various needs of present and future residents of the Region, and providing compact, efficient and accessible Urban Areas comprised of mixed uses.

Policies to implement these goals include:

a) Recognizing Urban Growth Centres and Regional Centres in Urban Areas as focal points of urban development in the Region;
b) Creating people-oriented places that are accessible by public transit and an extensive pedestrian network, including civic squares, parks and walkways;
c) Developing Urban Growth Centres, Regional and Local Centres that are characterized by distinctive forms of art and architecture.
d) Developing Waterfront Places as focal points along the Lake Ontario waterfront.
e) Restoring the historic integration of the shopping function with the other traditional functions, such as housing, employment, recreation, social activities and cultural facilities; and
f) Linking Urban Growth Centres, Regional Centres and Waterfront Places with supportive Corridors focused on active transportation and transit routes.

It is the intention of the ROP for development within the Urban System to be more compact, built at transit-supportive densities, contain a mixture of uses where appropriate, contain good urban design principles, allow for active transportation linkages, and provide for a transit-supportive road pattern (Policy 8.2.1). Urban Growth and Regional Centres, are to be the focal points for commercial, residential, cultural and public sector development and are intended to be well designed with an intensive land use form and higher density housing types (Policy 8A.1.1-Policy 8A.1.2). Urban Growth Centres are intended to accommodate the highest amount of density, and should be planned to accommodate a minimum density target of 200 persons and jobs combined per gross hectare (Policy 8A.2.2). Regional Centres should be planned to develop at a smaller scale than Urban Growth Centres and should be planned to support a long-term density target of at least 75 residential units per gross hectare (Policy 8A.2.2).

Regional Corridors provide efficient transportation links to the Urban Growth Centres and Regional Centres as well as other centres in adjacent municipalities (Policy 8A.2.9). Regional Corridors should support public transit by planning to achieve, where appropriate, a long-term density target of 60 residential units per gross hectare (Policy 8A.2.9).

Waterfront Places are focal points along the Lake Ontario waterfront, that integrate a variety of commercial, residential and recreational uses. (Policy 8A.2.12). Where appropriate, Waterfront Places should be planned to support an overall long-term density target of at least 60 residential units per gross hectare (Policy 8A.2.12).

Section 11 – Transportation System

Section 11 of the ROP provides long-term policies for its transportation system. Policy 11.3.19 of the ROP states that in order to support existing and future transit services, development

adjacent to a Transportation Hub, Commuter Station, Rapid Transit Spine and the High Frequency Transit Network shall provide for:

a) complementary higher density and mixed uses at an appropriate scale and context;
b) buildings oriented towards the street, to reduce walking distances to transit facilities;
c) facilities which support non-auto modes including: drop off facilities, bus bays, bus loops, bus shelters, walkways, trails and other pedestrian and cycling facilities; and
d) limited surface parking and the potential redevelopment of existing surface parking.

Policy 11.3.20 further supports Transit Oriented Development by encouraging Centres and Corridors that correspond to a Rapid Transit Spine be developed to their fullest potential.

2.2.2 Envision Durham Discussion Papers

As part of the *Envision Durham* process, the Region prepared six theme-based discussion papers intended to inform and solicit public and stakeholder feedback. This feedback is being used to inform the development of policies in the new ROP.

The relevant Discussion Papers for this study are the following:

2.2.3 Growth Management Urban System Discussion Paper

The Growth Management Urban System Discussion Paper provides an overview of the existing Urban System as well as the Region's growth management framework. It also discusses new provincial requirements and growth management issues facing the Region. The discussion paper posed a number of questions relevant to the GMS study including how MTSAs and SGAs should be delineated in the ROP, and how much density the MTSAs and SGAs should accommodate.

2.2.4 Housing Policy Planning Discussion Paper

The Housing Policy Planning Discussion Paper discusses how land use planning influences housing choice and affordability, and poses a series of questions on potential policy changes that could be made to support affordable housing and promote greater housing options. This discussion paper acknowledges that intensification will play an important role in achieving the Region's housing goals and targets moving forward.

2.2.5 Transportation System Discussion Paper

The Transportation Discussion Paper provides an overview of the existing Regional and provincial framework related to transportation planning, discusses key travel trends in Durham and identifies key themes that will need to be addressed in the Official Plan Update in order to be in conformity with provincial policies. These include but are not limited to supporting development in Major Transit Station Areas (MTSAs), encouraging Transit Oriented Development (TOD) and transit-supportive development.

2.2.6 Major Transit Station Areas Proposed Policy Directions Report

The *Major Transit Station Areas Proposed Policy Directions Report (December 2020)* provides an overview of the proposed MTSAs, summarizes best practices, trends and guidelines, refines certain delineations, and presents a set of draft policies for review and comment. MTSAs represent significant opportunities to curb sprawl and direct intensification and growth in a manner that maximizes the benefits of being within proximity to higher-order transit by focusing high densities and mixed-use development nearby.

The *Major Transit Station Areas Proposed Policy Directions Report* seeks to establish a vision for the MTSAs based on the principles of TOD. This vision describes MTSAs as being integrated with mixed-use development offering convenient, direct access from high-density development sites to station amenities and access points. Generally, the highest densities within MTSAs are intended to be concentrated on and in close proximity to station properties and to integrate the stations with development. Densities would transition to adjcant lower density areas in a manner appropriate to the context of each site.

General Policies relating to intensification within the MTSAs include:

1. Each MTSA will be planned to achieve a minimum density of 150 people and jobs per hectare;
2. In cases where an MTSA and a designed Urban Growth Centre or Regional Centre overlap, the higher density target shall apply;
3. The Region will encourage the provision of alternate development standards to support TOD, including reduced parking minimum requirements and the establishment of maximum parking requirements for both privately-initiated development applications and area municipal zoning-by-laws; and
4. MTSAs will consist of both higher intensity employment uses and residential uses that support the use of transit and achieve the strategic growth objectives of the Regional Official Plan.

Proposed policies within the *Major Transit Station Areas Proposed Policy Directions Report* state that MTSAs will support a broad mix of compatible uses at high densities, so that vibrant, active places are created and emerge as focal points within their respective communities. As such, MTSAs will be planned on the basis of providing active places and streetscapes, allowing a wide range and mix of high-density transit-oriented uses, based on pedestrian-oriented built form. Further, a mix of high-density residential, institutional, community, and commercial land uses would be permitted within MTSAs.

2.2.7 Proposed Policy Directions Report

The *Proposed Policy Directions Report (March 2021)*[20] presents potential changes to land use planning policies that will be included in the new Regional Official Plan. The proposed policy directions respond to, among other matters:

- growing demands to improve mobility options by emphasising increased opportunities for active transportation and transit availability; and
- focusing intensification within strategic growth areas, including along corridors and the areas surrounding existing and planned GO Stations.

The new ROP will include policies that protect the natural environment, establish and grow healthy communities, and support the development of a strong, diverse economy. Policy language will be either augmented or added throughout the Plan to (among others):

- increase the rate of intensification to, at a minimum, achieve the requirements of the Growth Plan, and thereby reduce the need and rate of greenfield development;
- optimize the use of existing infrastructure and coordinate new infrastructure development when planning for growth; and
- promote and facilitate a range of housing types and tenures, including attainable and affordable housing.

The need for diverse housing is recognized as a priority for the Region, with affordability and choice a growing concern. Providing housing options that are appropriate for households of various socioeconomic conditions and for people at different stages in their life cycle and of varying abilities is vital to community building. A wider range in the form of housing are being constructed in Durham, including more medium- and high-density forms such as townhomes and apartments. Smaller, high-density, residential units are often less expensive and more economically accessible for residents.

Strategic Growth Areas (SGAs) are discussed in the *Proposed Policy Directions Report* as places across the Region that are targeted for growth and intensification. New ROP policies specific to the planning and development SGAs include the following (among others):

- Initial recommendations on the components of the Regional Structure that warrant designation as SGAs, as well as those that do not.
- Identify SGAs as priority locations within the Region for the highest order of intensification, dense urban development and significant employment generating uses such as Major Office.
- Clarifying that where the boundaries of a Centre, Corridor, Waterfront Place and/or MTSA coincide or overlap, the applicable higher density target would apply; and

[20] See Report #2021-P-7 – Envision Durham – Proposed Policy Directions, File: D12-01

- Requiring area Municipalities to amend the official plans and zoning by-laws to delineate SGAs and update policies to ensure the minimum density targets contained in the ROP will be achieved;

The *Proposed Policy Directions Report* recommends that density targets provided for UGCs and MTSAs as "people and jobs per hectare" measured as a gross density (measured across all lands within the relevant boundaries). For consistency, this approach is also proposed to be applied to Regional Centres, Regional Corridors, and Waterfront Places.

2.3. Strategic Growth Area Policies

The Growth Plan emphasizes intensification within urban areas. Along with an increased intensification rate, The Growth Plan requires more detailed planning be undertaken to focus growth in SGAs. The Growth Plan defines SGAs as follows:

> "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. SGAs 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 SGAs."

Sub-Section 8A of the ROP identifies categories of Centres (including UGCs), Corridors and Waterfront Places. As part of the *Envision Durham* process the identification and introduction of Major Transit Station Areas in the ROP is being proposed.

The *Urban System Discussion Paper* identified canadidate areas that may meet the intent of SGAs policy and would therefore be appropriate to designate as SGAs in the ROP. This was further discussed in the Proposed Policy Directions Report, including initial recommendations on which candidate areas should be desgiated as SGAs, and which should not. This study compliments these previous reports by providing further analysis and quantifying the development and intensification potential within the following candidate SGAs:

Urban Growth Centres: focal points for intensive urban development and the main concentrations of institutional, public services, major office, commercial, recreational, residential, entertainment, and cultural land uses, and also serve as major employment centres.

Regional Centres: the main concentrations of urban activity, but at a smaller scale than Urban Growth Centres, providing a fully integrated array of institutional, commercial, major retail, residential, recreational, cultural, entertainment, and major office uses. This study has

assessed the Regional Centres in south Durham as well as the smaller Regional Centres in Northern Durham in the Townships of Brock, Scugog and Uxbridge.

Major Transit Station Areas: areas including and around any existing or planned higher order transit station or stop within a settlement area, or the area including and around a major bus depot in an urban core.

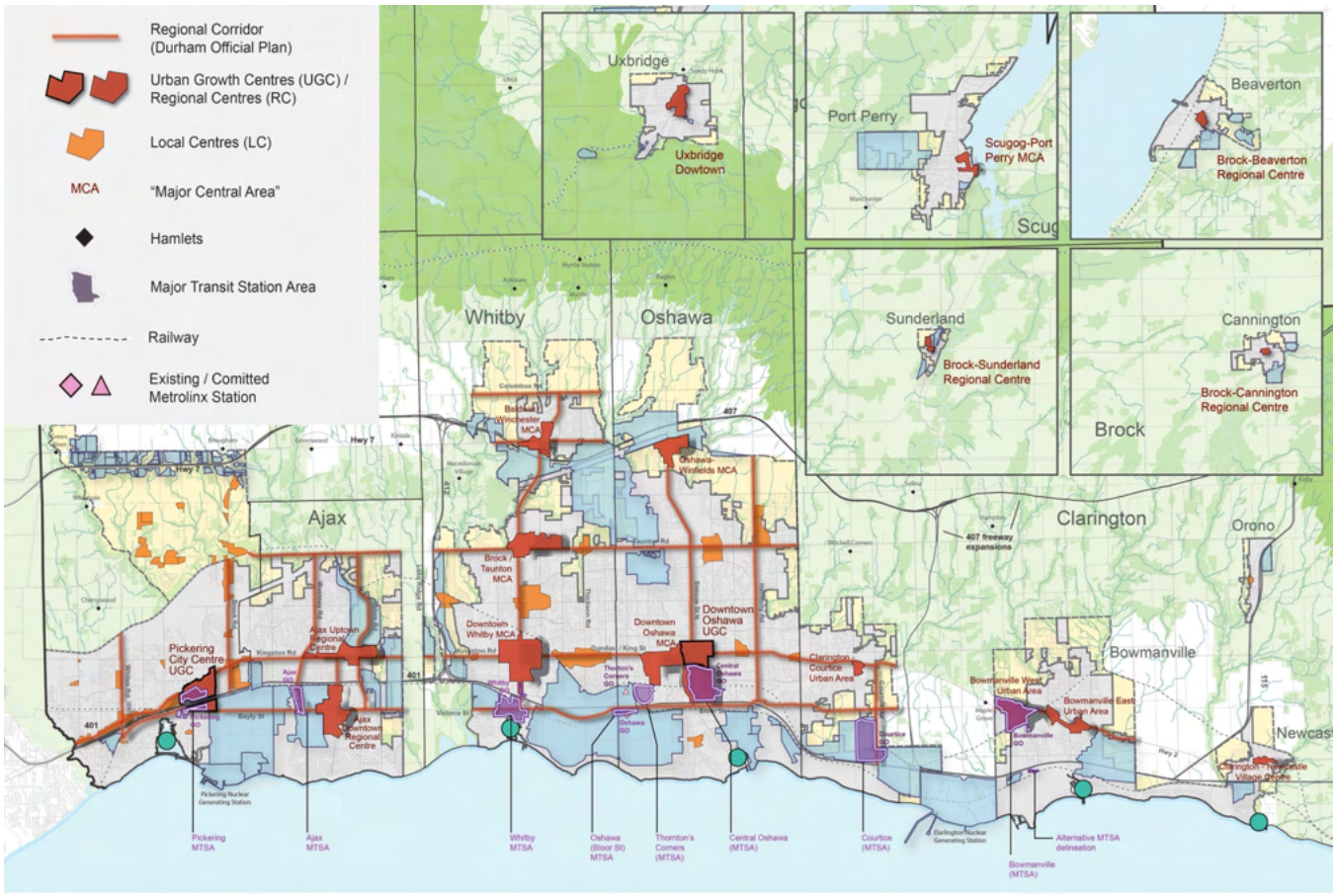
Regional Corridors: form key connections; provide for the movement of people and goods between Centres; and support public transit through mixed use development at higher densities.

Waterfront Places: focal points along the Lake Ontario waterfront that integrate a range of residential, commercial, and recreational uses with the surrounding Greenlands System.

There are 2 Urban Growth Centres, 8 existing or propsed MTSAs, 16 Regional Centres, 5 Waterfront Places, and 13 Regional Corridors identified in the current ROP. The 13 Corridors are divided into segments for the purpose of the Housing Intensification Study, with a total of 54 being reviewed individually.

The list of the candidate SGAs and their baseline data areas is included in the **Appendix A.** Figure 2-1 illustrates the location of these areas within the region.

Figure 2-1: Urban Growth Centres, Regional Centres, MTSAs, Regional Corridors and Waterfront Places in Durham



2.3.1 **Major Transit Station Areas**

MTSAs are defined in the Growth Plan (2019) as "The area including and around any existing or planned higher order transit station or stop within a settlement area; or the area including and around a major bus depot in an urban core. Major transit station areas generally are defined as the area within an approximate 500 to 800 metre radius of a transit station, representing about a 10-minute walk." There are eight MTSAs proposed within Durham, four of which are planned along the future GO East extension to Bowmanville at Thornton's Corners, Central Oshawa, Courtice, and Bowmanville. The existing MTSAs are located around the Pickering, Ajax, Whitby and Oshawa GO train stations.

The Growth Plan requires MTSAs served by the GO Transit rail network to be planned for a minimum density of 150 residents and jobs per hectare. It also states that, within all MTSAs, development will be supported, where appropriate, by planning for a diverse mix of uses, including additional residential units and affordable housing, to support existing and planned

transit service levels. These requirements shape the approach to soft site selection and typology application within the delineated MTSAs, with a focus towards high-density[21], mixed use development in these areas.

2.3.2 Urban Growth Centres

The Growth Plan requires the Urban Growth Centres (UGCs) located in Downtown Pickering and Downtown Oshawa to be planned for a density of 200 residents and jobs combined per hectare by 2031. Therefore, this study has assessed their potential to meet these targets in the delineated areas. There are 2 designated Urban Growth Centers in the ROP.

2.3.3 Regional Centres

The ROP designates Regional Centres as the main concentrations of urban activities in the Region, but generally at a smaller scale than UGCs. Regional Centres are intended to provide a full array of institutional, commercial, major retail, recreational, cultural, major office, residential and entertainment uses. There are 16 designated Regional Centres in the ROP.

The current ROP requires Regional Centres in southern Durham to achieve a long-term density target of at least 75 residential units per gross hectare and a floor space index of 2.5. For Regional Centres in northern Durham, the density target is 15 residential units per gross hectare.

2.3.4 Regional Corridors

The ROP identifies 13 Regional Corridors. Regional Corridors function as key connections; providing for the movement of people and goods between Centres; and supporting public transit through mixed use development at higher densities. The current ROP requires that Regional Corridors shall support an overall, long-term density target of at least 60 residential units per gross hectare and a floor space index of 2.5. Given the number and varied context of Regional Corridors, it is clear that not all Corridors have capacity to accommodate this level of growth. This Study has identified the Regional Corridors that can accommodate significant growth through intensification.

[21] High-density refers to housing units contained in Towers, High-rises, and Mid-rises. High-denisty housing units are typically apartmentts and condos.

3. Demographic and Socio-Economic Drivers of Housing Intensification in Durham Region

3.1. Introduction

This Chapter provides a brief overview of the key demographic and socio-economic factors which are anticipated to influence demand for housing intensification across the Region of Durham to the year 2051, including:

- The changing age structure of the population base and respective housing preferences as well as lifestyle choices of different age groups (e.g., Generation Z, Millennials, Generation X and Baby Boomers);
- Trends in housing affordability by structure type across the Toronto-Oshawa housing market area;
- Locational attributes and amenities of the Region's candidate SGAs 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 major infrastructure investments, specifically high-order transit; 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 region, it is important to address development feasibility. Development feasibility in the residential real estate market is typically based on unit price and developer profit, compared to a range of "hard" cost factors (e.g., tax rates, development charges, infrastructure, land costs, construction costs, servicing and utility costs, etc.) as well as "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, etc.). 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 residents, particulary younger demographic groups. These factors inform market demand for housing intensification and can impact the feasibility of development forms and types (i.e., high rise or tower forms of development constructed of concrete and steel, when compared to ground related and wood framed forms of construction) as well as the location of development in one geographic area over another (i.e. multi-storey intensive forms of development close to

rapid transit, compared to ground related townhouses within walking distance of a surface transit route).

While this report provides a recommended Region-wide intensification target, it is important to recognize that Durham's residential real estate market for residential intensification is not homogenous across each local municipality. Some of the key market factors have been broadly discussed in the Region-Wide Growth Analysis Technical Report and are further discussed in this Chapter.[22] Phase 2 of the Durham GMS will address these local factors in more detail and provide population and housing allocations, as well as individual intensification targets, to each Area Municipality and also by Planning Policy Area where applicable. Throughout Durham Region, there are local factors (e.g. access/proximity to high-order transit, residential land values, demographics and socio-economics) that are anticipated to influence the rate of residential intensification at the local municipal level.

3.2. Planning for Existing and Future Generations

Forecasted trends in population age structure influence the rate of future population growth as well as future housing needs, infrastructure requirements and community services. The influence of key age groups, including Generation Z, Millennials, Generation X and Baby Boomers, on future demand within local real estate markets are particularly important, as these demographic groups have varying housing needs. A summary of how evolving demographics is anticipated to shape future housing market demand across the Region of Durham is briefly provided in the Region-Wide Growth Analysis Technical Report. Future housing demands associated with these broad demographic groups will continue to be driven by a range of socio-economic factors, largely related to aging, housing affordability, lifestyle choices and the changing nature of work. These factors are further discussed below.

3.3. Locational Attributes, Shifting Economic Trends and Increased Market Appeal for Urban Living

As discussed in the *Opportunities and Challenges Report* and the Employment Strategy Technical Report, the Region of Durham benefits from its location within the Toronto-Waterloo Innovation Corridor. This Corridor is an internationally recognized technology innovation supercluster extending from Waterloo Region in the west to Durham Region in the east. Durham Region's location within this internationally recognized innovation corridor provides a key opportunity to leverage Durham's growing local economy in the technology sector. This will continue to help the Region in its efforts to connect local companies to a large and growing

[22] Durham Growth Management Study, Region-Wide Growth Analysis Technical Report, 2021.

local talent pool of skilled workers. This is especially the case for younger segments of the population.

The physical and locational attributes of SGAs will play a key role in their marketability and suitability for increased levels of intensification. This is particularly relevant for 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 well designed workspaces with higher levels of amenities. This underscores “place making” as an increasingly recognized and important planning approach to creating diverse and vibrant urban environments. This in turn can help attract local population and job growth, supported by investment in the public realm, mobility option and active transporation and an encouragement of integrated mixed use development.

3.4. Housing Affordability Trends in the Region of Durham

Housing affordability plays a key role in influencing housing demand by structure type. Figure 3-1 summarizes historical trends in Durham Region housing sale prices for all dwelling types between 2011 and 2020. Key observations include:

- During this time period, the average sale price of a home has risen from $317,000 in 2011 to $778,000 as of December 2020, representing a 145% increase;
- Housing prices over this time period have increased by 9.4% annually; and
- From the onset of the COVID-19 pandemic, average home prices have increased from $613,000 in April 2020 to $778,000 in December 2020, representing an increase of $165,000 or 27%.

During this time, there has been a greater erosion of housing affordability for low-rise and low-density housing forms in Durham Region. As of December 2020, the average low-density dwelling (single and semi-detached dwellings) sold for $851,000, the average condominium townhouse sold for $533,000, and the average condominium apartment sold for $442,000.[23]

Higher-density units may not necessarily be the most affordable units in all cases. While condominiums may generally be priced lower than freehold housing forms on average (depending upon location), the carrying cost of condominiums can be higher when condominium maintenance fees and other charges (e.g., parking costs if provided) are factored into the analysis.

As previously noted in the Region-Wide Growth Analysis Technical Report, average household income growth across Durham Region has not kept pace with housing price appreciation over

[23] Durham Region Association of Realtors, December 2020 Housing Report

the past several decades.[24] During the past five-year Census period (2011 to 2016), average household incomes increased at an annual rate of 2.3%, which is well below annual housing price appreciation rates experienced over this same time period, and speaks to this steady erosion in housing affordability.

In 2015, median household income in Durham Region was approximately $89,800, which would mean that maximum affordable shelter costs for homeowners were $2,245 per month.[25] A renter in Durham earning minimum wage (at $14/hour, working 40 hours per week) would need to pay approximately 56% of their gross income ($1,252) on average to rent a 1-bedroom apartment in Whitby in October 2020.[26]

Between 2006 and 2016 the number of homeowners paying more than 30% of their income on housing increased by 6% (from approximately 34,500 to 36,600). For renters the number paying more than 30% of their income on housing increased by 31% during this same time period, increasing from 15,600 in 2006 to 20,400 by 2016.[27]

As a result of continued upward pressure on housing prices and much slower income growth, there is a need to plan for sufficient opportunities within the region to accommodate a range of housing types (i.e. ground-oriented and high density) for all income levels, including market, affordable, assisted and emergency housing.[28] [29] As identified through the potential housing supply analysis identified in Chapters 6 and 7, many of the high-density housing opportunities have been identified within the Region's SGAs.

[24] Durham Growth Management Study, Region-Wide Growth Analysis Technical Report, 2021.

[25] Statistics Canada, 2016 Census of Population

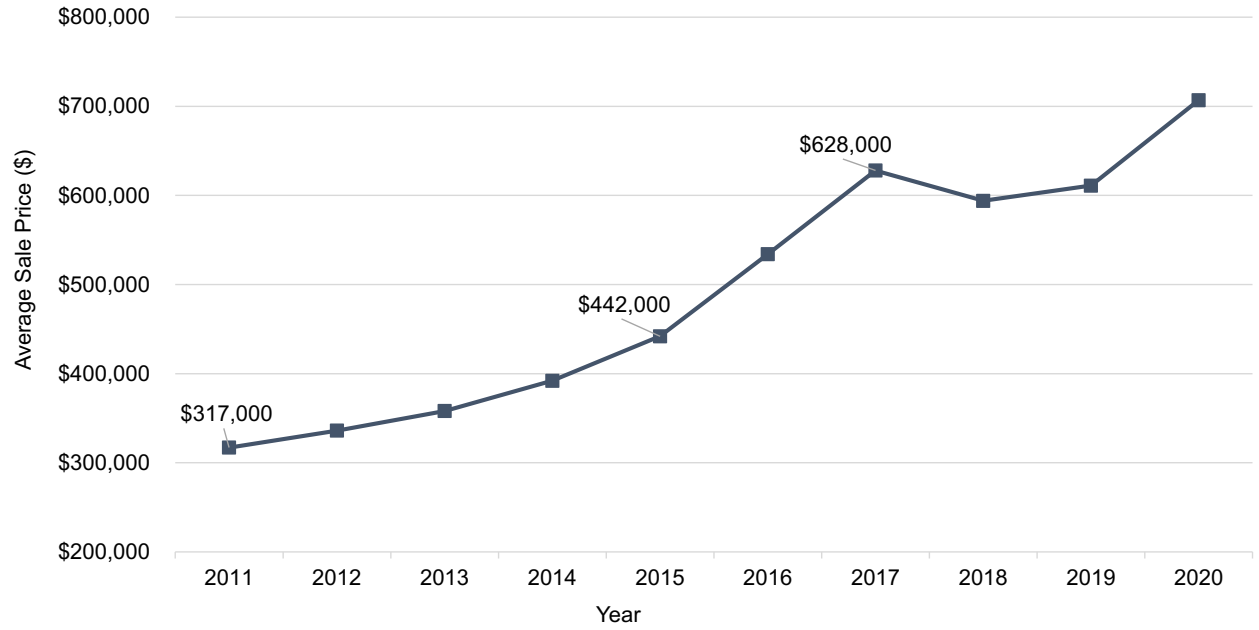
[26] CMHC Housing Portal.

[27] Statistics Canada Census Profiles, 2006 and 2016.

[28] Affordable housing is defined in the 2020 Provincial Policy Statement, page 39, 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.

[29] Assisted housing is defined as housing that is available to households for rent or purchase where part of the housing cost is subsidized through a government program.

Figure 3-1: Durham Region, Average Home Price, 2011 to 2020



Source: Durham Region Association of Realtors, December 2020 Housing Report, derived by Watson & Associates Economists Ltd., 2021.

3.5. Student Housing Needs in the Region of Durham

A small but growing share of the Region's Census population is anticipated to be made up of non-permanent residents (NPR). Non-permanent residents are defined by Statistics Canada as 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. The increase in NPRs in Durham has been largely influenced by growth of international students in post-secondary institutions as well as knowledge-based employment opportunities. It is important to recognize population growth potential related to NPR because this component of the population is anticipated represent a larger share of the Region's population over the long-term planning horizon.[30]

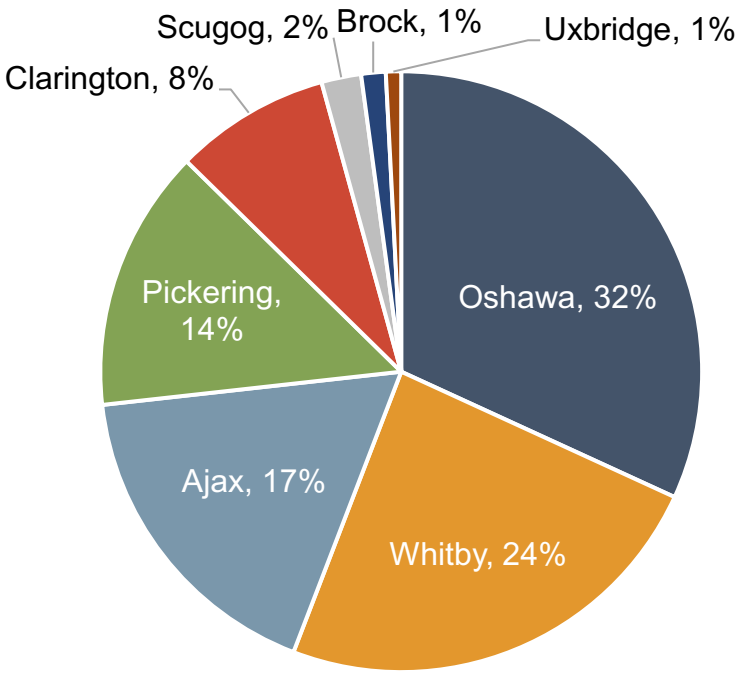
NPRs include foreign workers, foreign students, the humanitarian population such as refugees and other temporary residents. In accordance with the 2016 Statistics Canada Census, NPR population represented almost 1% of the Region's population in 2016, or approximately 3,000 persons. The NPR population is generally concentrated in the 15 to 34 age group and is largely attributed to post-secondary students and working professionals. Looking forward, it will

[30] As previously noted in the Region-wide Growth Analysis Technical Report, the Statistics Canada Census population represents the permanent population which includes persons who reside in Canada on a permanent basis as well as the NPR population.

be important to monitor population growth within this segment of the population across Durham Region.

Figure 3-2 summarizes the share of NPR population by local municipality based on 2016 Statistics Canada data. As of 2016, the largest share (32%) of Durham's NPR population was located in the City of Oshawa, which can likely be attributed to the non-permanent student population enrolled at Ontario Tech, Trent University and Durham College. The Town of Whitby, the Town of Ajax and the City of Pickering also contain a significant share of the regional NPR population, with 24% and 17% respectively.

Figure 3-2: Region of Durham, NPR Primary Household Maintainers by Structure Type, 2016



Source: Statistics Canada 2016 Census Profile, derived by Watson & Associates Economists Ltd., 2021.

Looking forward, housing preferences associated with the NPR population are anticipated to be increasingly accommodated through high-density forms. This population group is anticipated to be a driver of both near and longer-term demand for housing intensification and an important consideration for the Region's economic competitiveness in the innovation sector.

3.6. Future Market Demand for Ground-Oriented and High-Density Housing Forms

The Region's active development application data was reviewed to provide insight into the demand for residential units within the BUA and DGA. Over the past 15 years, the residential real estate market across the Region of Durham, most notably within the municipalities located in southern Durham Region, has been transitioning from low-density housing forms towards medium and high-density development. Based on the Region's active development application data (see Figure 3-3), approximately 82,000 residential units are currently active (pending, draft approved or registered and unbuilt) within development approval process across the Region. Of these, 28% are low density (singles and semi's), 25% are medium density (townhouses) and 47% are high density (apartments).

When considering the distribution of active development applications (see Figure 3-4), nearly 60% of these units (approximately 48,000) are located within the DGA. The majority of these proposed units (74%) are in the form of ground-oriented housing types. There are also approximately 35,000 units located within the BUA associated with active development applications, of which the majority (77%) are high density. Over the next 10 to 15 years, it is anticipated that most of these high-density units will be constructed and occupied.

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. Notably, the population ages 64 and older are expected to be a growing share of Durham Region's population base, increasing from 14% in 2016 to 20% by 2051. Recent development trends combined with a review of total housing growth potential associated with active development applications within BUA suggests that demand will continue to remain strong over the next decade, particularly for high-density development.

Figure 3-3: Region of Durham, Housing Units in Active Development Applications by Type, 2018

	Low Density Units	Medium Density Units	High Density Units	Total Units
Ajax	600	1,600	6,700	8,900
Brock	700	-	100	800
Clarington	3,500	2,100	4,700	10,300
Oshawa	4,600	4,600	7,500	16,700
Pickering	6,600	8,700	18,900	34,200
Scugog	300	100	-	400
Uxbridge	100	100	-	200
Whitby	3,700	3,200	4,200	11,100
Durham Region	**20,100**	**20,400**	**42,100**	**82,600**

Source: Watson & Associates Economists Ltd., 2021.

Figure 3-4: Region of Durham, Housing Units in Active Development Applications by Policy Area, 2018

	Units Within the BUA	Units Within the DGA	Total Units
Ajax	7,000	1,900	8,900
Brock	-	800	800
Clarington	2,600	7,700	10,300
Oshawa	6,700	10,000	16,700
Pickering	13,500	20,700	34,200
Scugog	-	400	400
Uxbridge	-	200	200
Whitby	4,700	6,400	11,100
Durham Region	**34,500**	**48,100**	**82,600**

3.7. Access/Proximity to Higher-Order Transit

Access and proximity to higher-order transit (i.e., GO Transit and Durham Region Transit (DRT)) is an increasingly essential component of large-scale residential and non-residential intensification projects, particularly office and mixed-use development. Across Durham Region, major downtowns will be supported by direct access to higher-order transit. The GO Rail Lakeshore East line and its extension to Bowmanville presents an opportunity to accommodate additional intensification in proximity to existing and future GO Transit stations. As of February 2020, Metrolinx endorsed Option 2 of the GO Train extension route which will connect with the Oshawa GO Station and run north of Highway 401 to Bowmanville.[31] The expansion will lead to the addition of two new Stations in Oshawa (Thornton's Corners East and Central Oshawa) and two new stations in Clarington (Courtice and Bowmanville).[32] This extension will create greater connectivity within Durham Region, as well as enhancing the Region's connection with the broader GGH, making these new MTSAs attractive locations for housing a broad range of people including young professionals, seniors and student populations.

Durham Region, in association with Metrolinx and the City of Toronto, have been planning for a rapid transit corridor which can provide greater connectivity and accessibility to accommodate future travel demand between the Toronto-Durham boundary. The Durham-Scarborough Bus Rapid Transit (DSBRT) service will create greater connectivity between the Toronto and Durham employment markets, with the service planned to run 36km within Oshawa, Whitby, Ajax, Pickering and Scarborough.[33]

[31] GO East Clarington: https://www.clarington.net/en/do-business/go-east-clarington.asp
[32] Metrolinx to Significantly Increase Trains to Bowmanville: http://www.metrolinx.com/en/greaterregion/projects/bowmanville-expansion.aspx
[33] Metrolinxengage.com

In response to the GO Train extension, Durham Region Council created a Rapid Transit and Transit-Oriented Development (TOD) Office, to promote compact communities along the GO Lakeshore East Line, including the extension to Bowmanville and the DSBRT Corridor.[34] Achieveing TOD is not exclusive to MTSAs and policies will be applicable to SGAs located along transit routes.

3.8. Demand for Secondary Units within the BUA

Demand for secondary units is anticipated to contribute to the housing intensification potential within Durham Region, particularly in low-density, stable neighbourhoods. By 2051, the number of ground-related dwellings within the Region's BUA is anticipated to reach approximately 168,900. Based on a review within Durham and comparator Regions, it has been assumed that 3% of these dwellings may add a secondary unit creating gentle infill intensification opportunities.[35] On this basis, there is capacity for approximately 5,100 secondary units within the BUA accommodating approximately 8,500 people. Demand for secondary units also exists within the DGA, however supply opportunities are anticipated to be more limited relative to the BUA due to smaller lot sizes, which poses potential constraints to parking and opportunities for ancillary buildings. Secondary unit development within the DGA will largely accommodated through basement apartments and other secondary dwellings.

[34] Envision Durham Proposed Policy Directions Report.
[35] Previous analysis by Watson in similar geographies (where data is available) has indicated that a secondary unit assumption of 2 to 3% is an accurate reflection of legal secondary unit dwellings. However, this assumption may be conservative over the forecast period.

4. Region of Durham Housing Intensification Forecast

4.1. Introduction

Chapter 4 builds on the growth drivers presented in Chapter 3 and Region-Wide Growth Analysis Technical Report. This chapter includes:

- A brief review of historical housing and intensification trends;
- Region-wide housing forecast by structure type from 2016 to 2051; and
- Intensification forecast from 2022 to 2051.

The housing intensification forecast is based on the following assumptions and targets:

- Growth Plan, Schedule 3 population and employment forecasts to 2051;
- 50% of annual housing growth from 2022 to 2051 allocated within the region's BUAs; [36] and
- A minimum density of people and jobs per hectare in Region's Designated Greenfield Areas (DGA).[37]

4.2. Region of Durham Historical Trends, 2006 to 2019

4.2.1 Historical High-Density Housing Demand

Over the past two decades, the residential real estate market in Durham Region has been transitioning towards high density development. As illustrated in Figure 4-1, the share of Region-wide high-density housing growth increased from 8% during the 2006 the 2011 period, to 19% from 2011 to 2016 and 22% from 2016 to 2019.

[36] Refer to Section 4.3.3. herein for a discussion of the 50% minimum residential intensification target within the context of absolute forecast housing growth relative to historical trends.
[37] Refer to Community Land Needs Assessment Technical Report, April 2021.

Figure 4-1: Durham Region, High-Density Housing Growth as Share of Total Housing Growth, 2006 to 2020

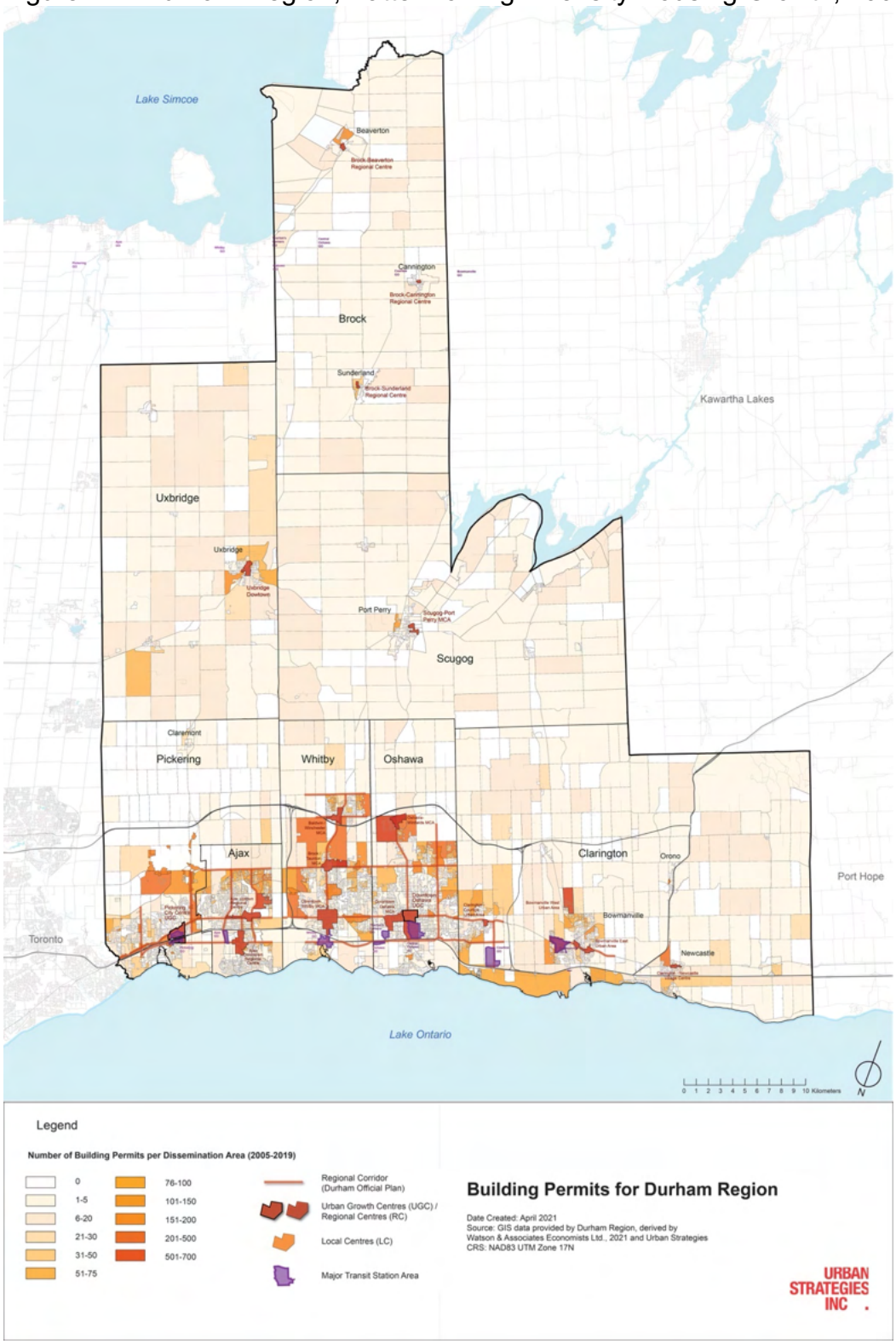
Period	Total Housing Growth		Annual Housing Growth		High Density Share of Total Housing Growth
	High Density	Total	High Density	Total	
2006 to 2010	1,390	17,340	278	3,468	8%
2011 to 2015	2,380	12,510	476	2,502	19%
2016 to 2020	4,690	16,510	938	3,302	28%

Source: Building permit data provided by Durham Region. Figure by Watson & Associates Economists Ltd., 2021.

The majority of high-density development has occurred within the southern Durham Region municipalities, accounting for 97% of Region-wide high-density housing development activity from 2016 to 2019. Figure 4-2 spatially illustrates the location of high-density housing activity during this period. Key observations include:

- Within the BUA, recent high-density development activity has clustered within and directly surrounding Regional Centres and Corridors;
- High-density development has also been concentrated in existing MTSAs that permit residential development and are served by higher order transit; and
- Post-secondary institutions, specifically the Ontario Tech campus in Oshawa, have a large share of high-density development occurring within proximity.

Figure 4-2: Durham Region, Pattern of High-Density Housing Growth, 2006 to 2019

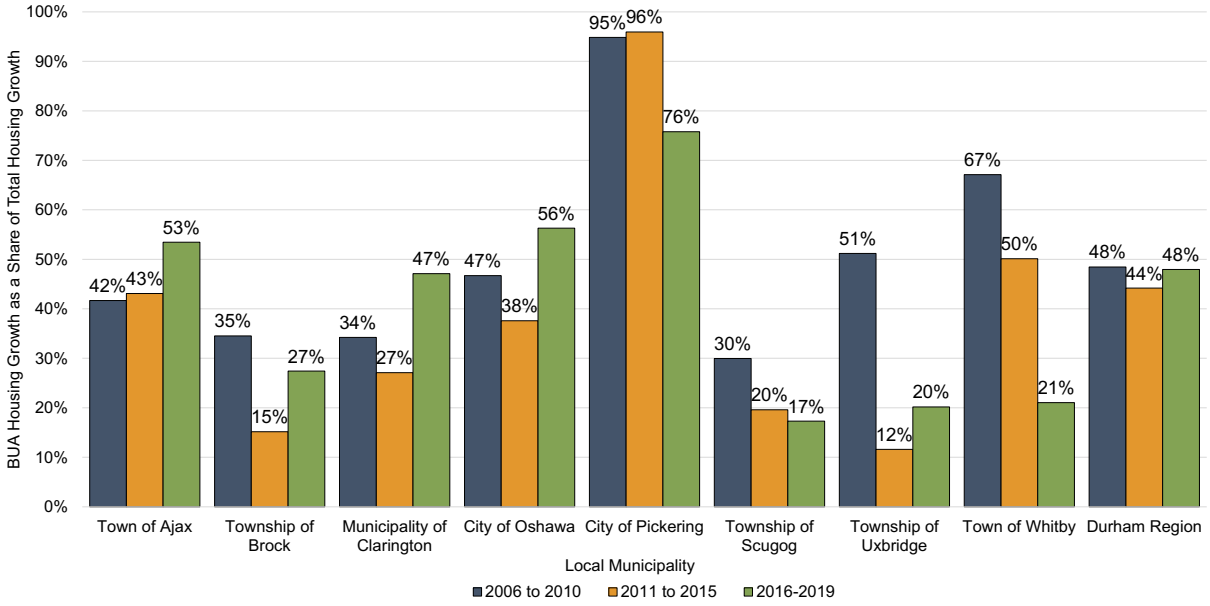


4.2.2 **Pattern of Intensification by Area Municipality**

Figure 4-3 summarizes annual intensification in Durham Region by area municipality from 2006 to 2010, 2011 to 2015 and 2016 to 2019. Figure 4-4 summarizes the changing intensification trends for high-density housing within Durham Region by area municipality during the same time periods. Key observations are as follows:

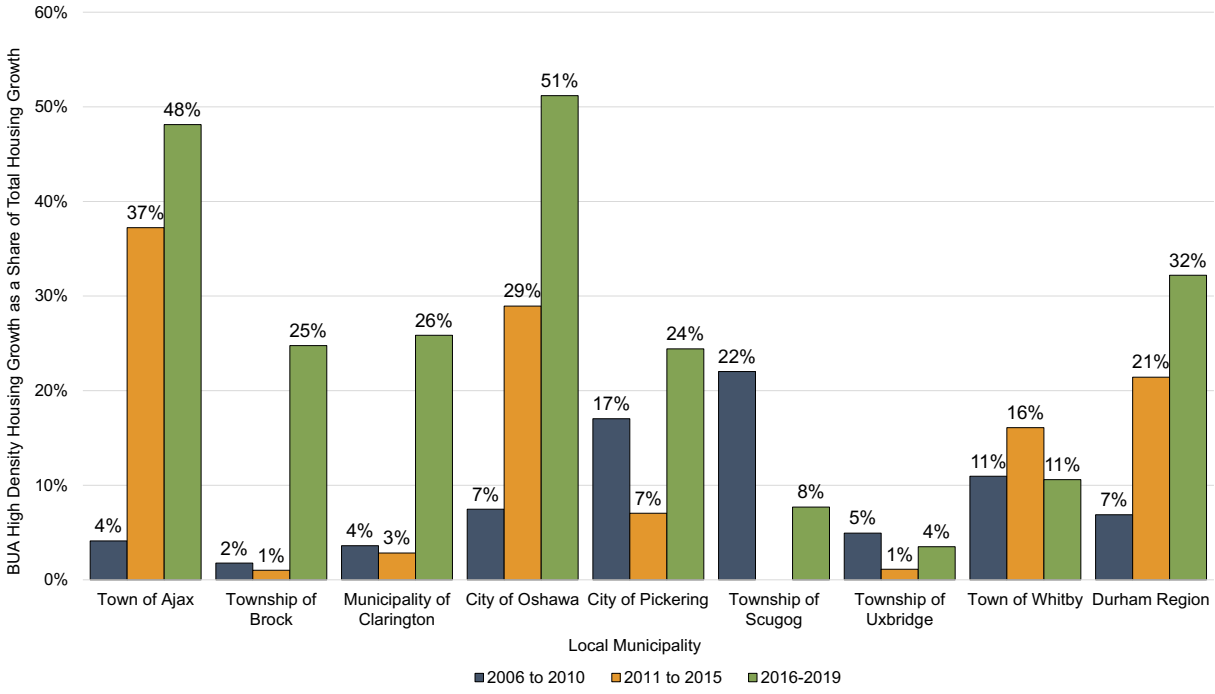
- Intensification has accounted for 47% of region-wide growth from 2006 to 2019;
- The City of Pickering has had the highest housing intensification share of the Region's area municipalities, reaching an average of 88% between 2006 and 2019;
- Compared to other municipalities in the region, the Town of Whitby, the City of Oshawa, and the Town of Ajax have all experienced higher intensification rates between 2006 and 2019, with 49%, 47% and 44%, respectively;
- Ajax, Clarington and Oshawa have experienced an increase in intensification when comparing the 2006 to 2010 and 2016 to 2019 periods;
- The northern Durham area municipalities of Brock, Scugog and Uxbridge have experienced relatively low shares and absolutes levels of intensification;
- While the share of total growth in the BUA has been relatively stable over the 2006 to 2019 period, recent residential development activity in the BUA has been transitioning towards high-density housing forms. This is partially 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;
- The share of high-density development within the BUA accounted for 18% of region-wide growth from 2006 to 2019. The share has increased from 7% over the 2006 to 2010 period, to 21% over the 2011 to 2015 period and to 32% from 2016 to 2019; and
- Although high-density development is largely concentrated in the southern Durham municipalities, the northern municipalities have begun to experience moderate increases in high-density growth over the last decade.

Figure 4-3: Durham Region, Historical Intensification by Area Municipality, 2006 to 2019



Source: Durham Region building permit data, 2006 to 2019, derived by Watson & Associates Economists Ltd., 2021.

Figure 4-4: Durham Region, Historical Percentage of New High-Density Housing Development within the BUA as a Share of Total Housing Growth by Area Municipality, 2006 to 2019



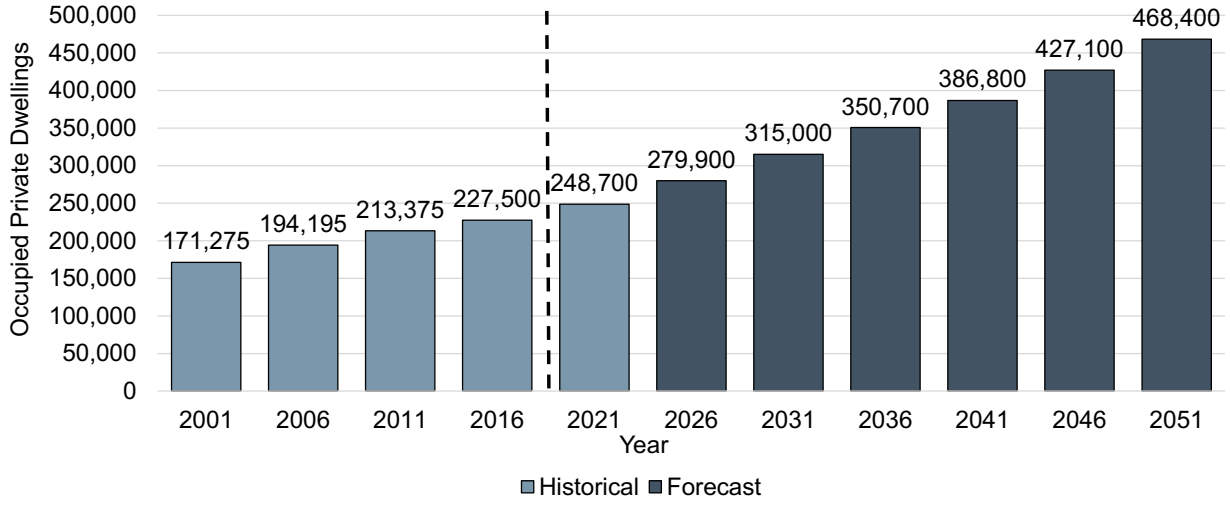
Source: Durham Region building permit data, 2006 to 2019, derived by Watson & Associates Economists Ltd., 2021.

4.3. Region of Durham Housing Forecast by Structure Type, 2016 to 2051

4.3.1 Total Households

As identified in the Durham Region Growth Analysis Technical Report, the Region's housing base is forecast to reach approximately 468,400 total households by 2051, as illustrated in Figure 4-5.[38]

Figure 4-5: Durham Region, Census Housing Forecast, 2016 to 2051



Source: Historical data from Statistics Canada Census Profiles, 1991 to 2016. Forecast (2016 to 2051) by Watson & Associates Economists Ltd.

4.3.2 Census Housing Forecast by Structure Type

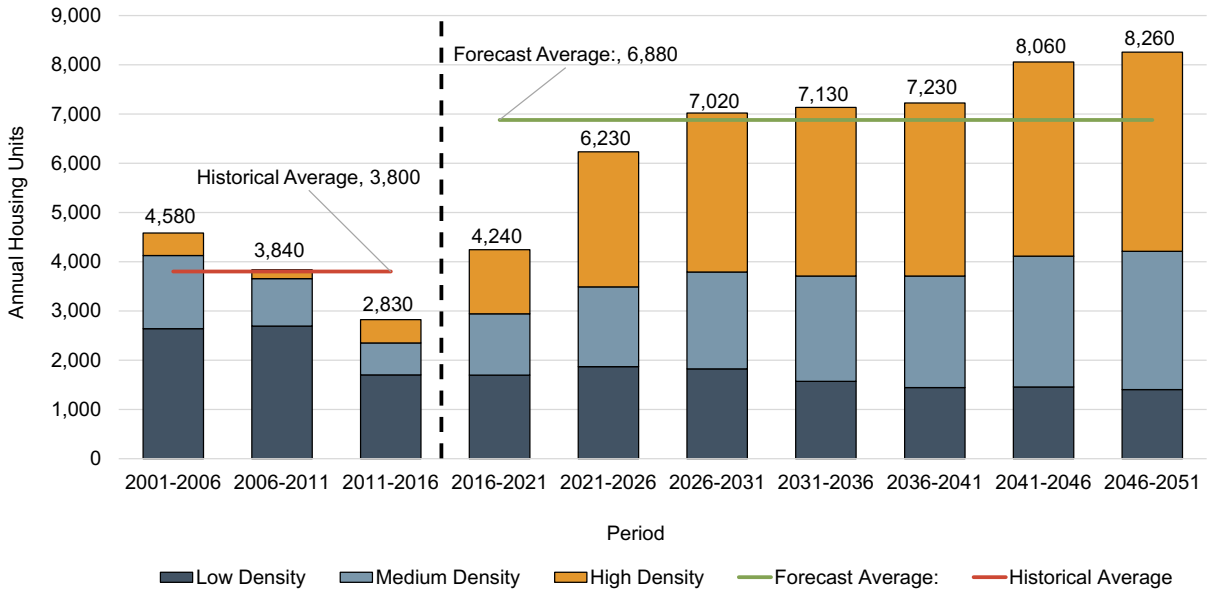
As previously noted, the region-wide housing forecast by structure type has been developed in accordance with a minimum density of people and jobs per hectare in the DGA and the minimum housing intensification target of 50% between 2022 and 2051. Figure 4-6 summarizes the Durham Region Census housing forecast by structure type (i.e. low density, medium density and high density) over the 2016 to 2051 forecast period in five-year growth increments. For comparative purposes, historical and estimated housing growth by structure type is also provided for the period between 2001 and 2021. Key observations include:

- Long-term housing demand over the 2021 to 2051 planning horizon is anticipated to remain concentrated in grade-related housing types, but is expected to steadily shift towards high-density forms, driven by forecast trends in population age structure and housing affordability, as previously discussed in Chapter 3;

[38] Census housing is classified as a dwelling in which a person or a group of persons is permanently residing.

- New infrastructure investment will also influence this shift towards high-density development, particularly in MTSAs, Regional Centres, and UGCs; and
- Forecast housing demand from 2016 to 2051 is anticipated to be comprised of 23% low-density housing, 31% medium-density housing and 46% high-density housing, with an increasing shift towards high-density during the 35-year forecast period.

Figure 4-6: Durham Region, Annual Census Housing Forecast by Structure Type, 2016 to 2051



Source: 2001 to 2016 derived from Statistics Canada 2001-2016 Census data. 2016 to 2051 forecast by Watson & Associates Economist Ltd., 2021.
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.

4.3.3 Region of Durham Housing Intensification Forecast, 2022 to 2051

Figures 4-7 through 4-9, summarize Durham Region's housing intensification forecast from 2022 to 2051. Key observations are as follows:

- Approximately 213,400 housing units are forecast in Durham Region between 2022 and 2051; representing an annual increase of 7,400 units across the Region, compared to 3,500 annually between 2006 to 2022;
- The BUA is forecast to accommodate approximately 106,700 households and 247,000 people over the 2022 to 2051 period;
- The intensification forecast is slightly above the historical housing intensification ratio of 46% from 2010 to 2019;
- The absolute amount of annual housing growth (units per year) required to achieve a 50% intensification rate from 2022 to 2051 is noticeably higher than what has occurred

during the 2006 to 2022 period. Achieving the 50% intensification target will require more than double the absolute level of annual housing growth (units per year) through intensification in the BUA between 2022 to 2051, than what has occurred during the 2006 to 2022 period. This translates to an annual BUA forecast of 3,680 households between 2022 to 2051 compared to 1,640 annual households accommodated within the BUA between 2006 and 2022;

- Similarly, DGA housing supply is also anticipated to experience significant growth, with 3,650 units per year between 2022 to 2051 compared with 2,160 from 2006 and 2022;
- 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
- The 50% Region-wide housing intensification target from 2022 to 2051 will vary by Area Municipality.

Figure 4-7: Durham Region, BUA Population and Housing Growth Forecast (Intensification), 2022 to 2051

Year	Low-Density Households[1]	Medium-Density Households[2]	High-Density Households[3]	Total Households
2016	142,670	26,280	25,800	194,750
2022	144,640	29,260	33,940	207,840
2051	148,400	48,380	117,750	314,530
Incremental Growth				
2022 to 2051	3,760	19,120	83,810	106,690

Source: 2016 derived from Statistics Canada Census. 2022 to 2051 by Watson & Associates Economists Ltd., 2021.

[1] 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.

[2] Medium-density includes townhouses and apartments in duplexes

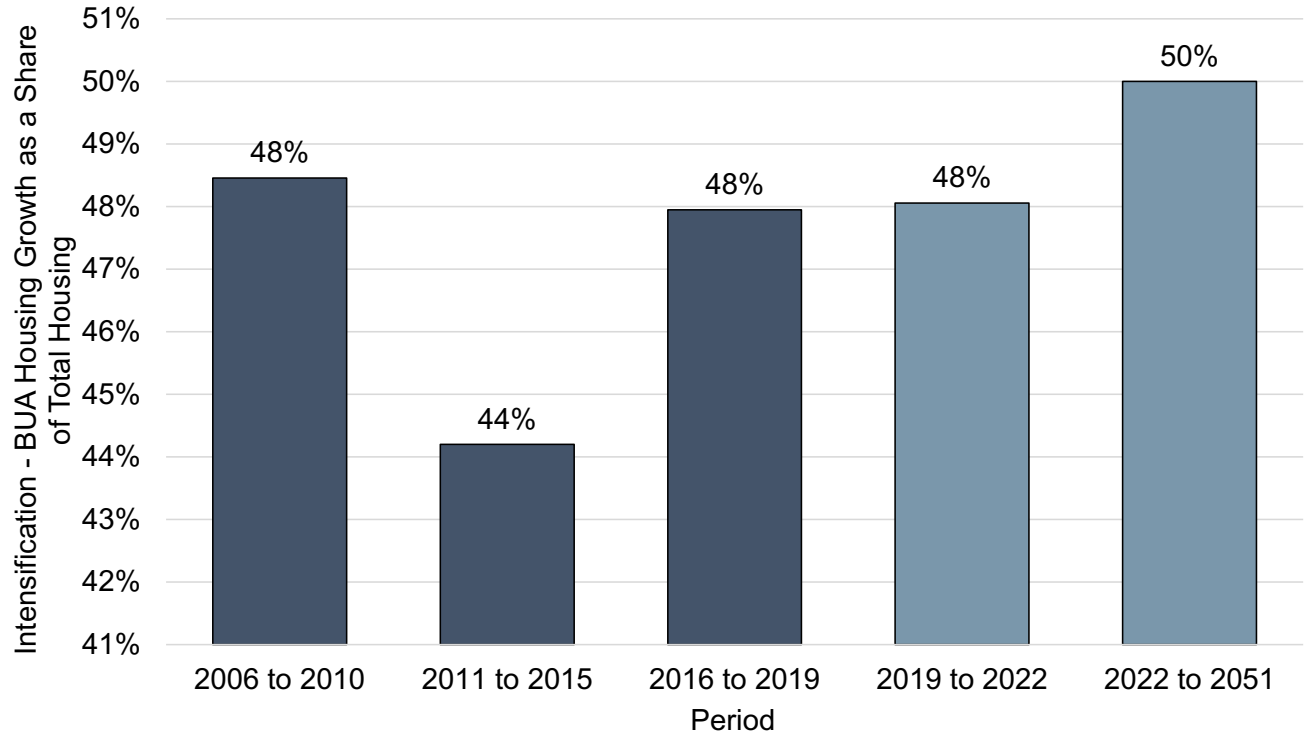
[3] High-density includes bachelor, 1-bedroom and 2-bedroom+ apartments

Figure 4-8: Durham Region, BUA Annual incremental Housing Forecast (Intensification), 2022 to 2051

		2006 to 2022	2022 to 2051
(A)	Annual High-Density Housing Growth Within the BUA	720	2,890
(B)	Annual Housing Growth Within the BUA	1,640	3,680
(C)	Annual Total Housing Growth	3,460	7,360
(A/C)	High-Density Housing Growth in BUA Share of Total Housing Growth	21%	39%
(B/C)	Intensification – Housing Growth in BUA Share of Total Housing Growth	47%	50%

Source: Watson & Associates Economists Ltd., 2021.

Figure 4-9: Durham Region Historical Annual Intensification Rate (2006 to 2019) vs. Forecast Annual Intensification Rate (2022 to 2051)

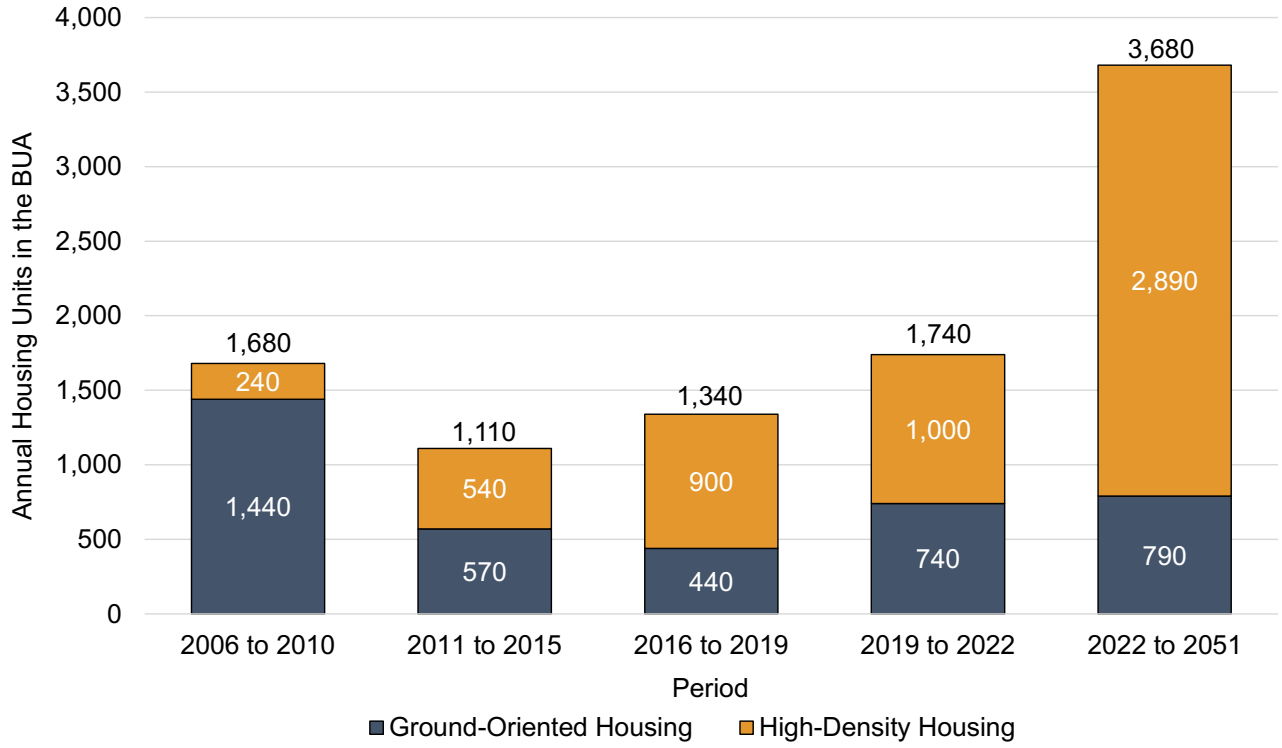


Source: Durham Region building permit data, 2006 to 2019. Forecast by Watson & Associates Economists Ltd., 2021.
Note: It is assumed that 50% intensification is achieved annually from 2022 to 2051.

Figure 4-10 and Figure 4-11 illustrate the intensification forecast by housing structure type from 2022 to 2051. Historical and estimated housing intensification trends between 2006 and 2022 are also provided for context. Key observations include:

- As opportunities for ground-oriented housing in the BUA diminish, the BUA is anticipated to accommodate an increasing share of high-density housing (mid-rise, high-rise and tower apartments). High-density forms of housing are forecast to comprise a growing share of housing intensification, increasing from 44% from 2006 to 2022, to 79% between 2022 to 2051;[39] and
- It is noted that annual housing intensification rate will vary from 50% over the forecast period as influenced by market demand, the timing of development approvals, construction and occupancy associated with large-scale high-density developments.

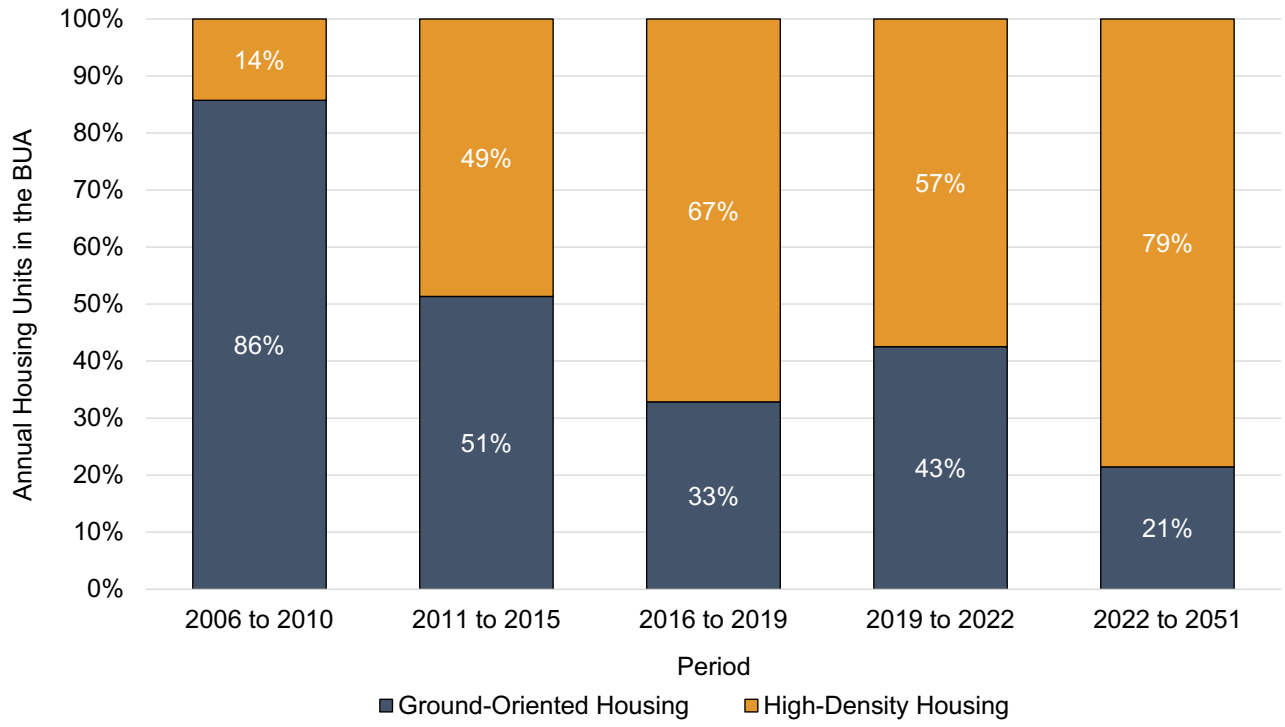
Figure 4-10: Durham Region, BUA Annual Housing (Intensification) Forecast by Density Type, 2022 to 2051



Source: Durham Region building permit data, 2006 to 2019. Forecast by Watson & Associates Economists Ltd., 2021.
Note: Ground-oriented housing captures both low- and medium-density dwelling types.

[39] Ground-oriented housing captures both low- and medium-density dwelling types.

Figure 4-11: Durham Region, BUA Housing (Intensification) Forecast Percentage Share by Structure Type, 2022 to 2051



Source: Durham Region building permit data, 2006 to 2019. Forecast by Watson & Associates Economists Ltd., 2021.
Note: Ground-oriented housing captures both low- and medium-density dwelling types.

4.4. Summary

The Region's long-term housing intensification forecast has been determined based on a review of historical residential trends, active development applications and longer-term housing supply opportunities within the BUA. Other factors that will influence intensification, such as broader demographic and socio-economic trends that are anticipated to influence the Region's residential real estate market over the long-term, have also been considered. In accordance with these factors, achieving a 50% intensification target from 2022 to 2051 is an achievable target from both a policy and market perspective.

In recent years, demand for housing in intensification areas has been strengthening, reaching nearly 50% of total Region-wide housing growth over the 2006 to 2022 period, driven by a steady shift towards high-density housing. The market drivers discussed in the preceding subsections suggest that the shift in demand towards high density housing will continue to strengthen over the 2022 to 2051 forecast period.

The intensification target is a ratio which is directly tied to total housing growth. When considering absolute housing growth, achieving a 50% intensification target during the 2022-

2051 timeframe will require an increase of more than double the current annual housing growth that is taking place in the BUA. This translates to an annual BUA forecast of 3,680 households during the 2022-2051 period compared to the current 1,640 annual households accommodated within the BUA between 2006 and 2022.

It should be noted that past intensification from 2006 to 2022 included a considerable portion of housing development within the BUA that was ground-oriented, at approximately 56%. Looking forward, minimal opportunities are anticipated to be available for low-density housing (single- and semi-detached) within the BUA. This suggests that potentially higher alternative housing intensification targets may be somewhat difficult to achieve as the absolute housing requirement associated with increased intensification targets will increase.

5. Housing Intensification Study Methodology

This Chapter describes the steps used in the analysis for the Housing Intensification Study. This methodology and its assumptions were developed in consultation with staff at the Region and area municipalities. The methodology was further refined through the process.

5.1. Methodology Overview

The Housing Intensification Study is primarily focused on locations that have the potential to meet the definition of an SGA in the Region of Durham. This includes Urban Growth Centres, proposed Major Transit Station Areas, Regional Centres, Waterfront Places, and Regional Corridors typically acting as the connective links between these Centres. Consideration was also given, at a high level, to intensification potential of Local Centres, Local Corridors and infill within established neighbourhoods, or 'gentle infill intensification'.

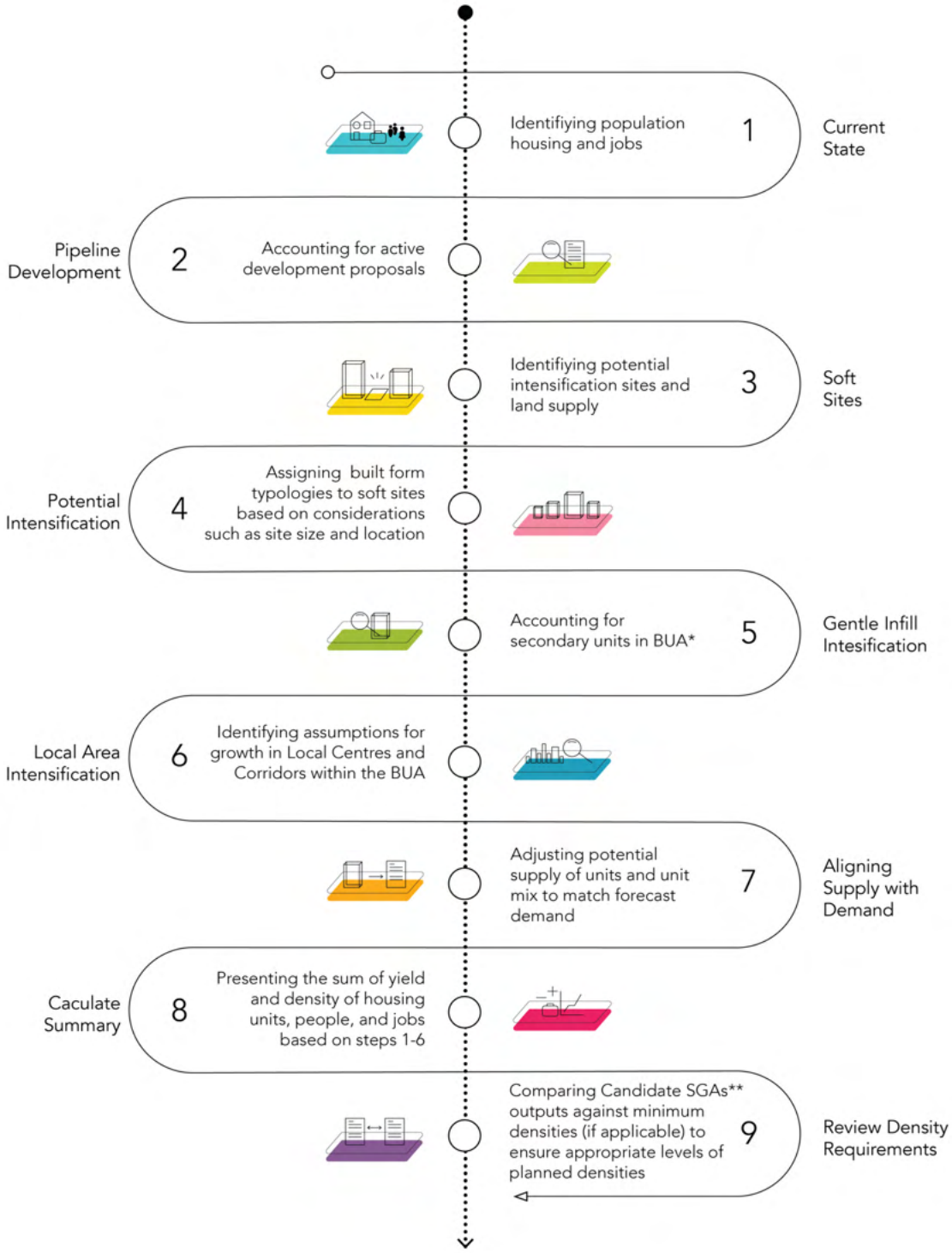
The Housing Intensification Study Methodology involved the following nine key steps. These steps are illustrated in Figure 5.1 and further detailed below.

1. Current state: identifying existing population, housing and jobs
2. Pipeline Development: accounting for active development proposals
3. Soft sites: identifying potential intensification sites and land supply
4. Potential Intensification: assigning built form typologies to soft sites based on considerations such as site size and location
5. Gentle Infill Intensification: accounting for secondary units in the BUA
6. Local Area Intensification: identifying assumptions for growth in Local Centres and Corridors within the BUA
7. Aligning Supply with Demand: adjusting potential supply of units and unit mix to match forecast demand by unit type
8. Calculate Summary: presenting the sum yield and density of housing units, people, and jobs based on steps 1-6
9. Review Density Requirements: Comparing the outputs against minimum densities (if applicable) to ensure appropriate levels of planned densities

The methodology was applied across the Region with attention to the local context. A fine-grain evaluation of soft sites was carried out for Centres and Corridors. Development assumptions have been adjusted based consultation with area municipality staff and data. The outcome is a set of geospatial data that represents the growth potential within the BUA by 2051 and at full build-out of the region.

This data set is not intended to be finite; it is assumed that future intensification analyses would identify new development sites and capacity as the region evolves over time, and adjustments to assumptions could be necessary to respond to shifts in development trends and/or market demand.

Figure 5-1: Housing Intensification Study Methodology



*BUA: Bult Up Area
**SGA: Strategic Growth Area

5.1.1 Current State – Determining population, housing and jobs of study area

In order to identify the existing number of units, people and jobs in the region, data from the Census, Region of Durham, area municipalities, and background research was completed prior to this study. The baseline data is contained in Appendix A.

5.1.2 Pipeline Development

The second step involved developing a data set of the development applications currently under review, referred to as the 'pipeline data'. The inclusion of pipeline data has been carried out in the following steps:

1. Obtain all development applications across the region within the BUA
2. Tabulate application data and identify each application by file number, municipality, policy area, number of units by type(s), people per unit value (PPU), non-residential floorspace, SGA type (e.g. Regional Centre, MTSA, UGC), and SGA location
3. Calculate total units if more than one type
4. Divide non-residential floorspace by floorspace/worker assumption for number of jobs
5. Multiply residential units by PPU for number of people
6. Add calculated data to supply by area municipality and regional level

As the purpose of this study is to demonstrate the potential intensification supply for the region, all proposed development applications are factored in at their original development application unit count, unless the number of units has been modified through the development process. Proposals that have been advanced through the preconsultation process, but have not yet been submitted as development applications were not factored into the analysis, but the site may have been included as a "soft site" where appropriate as noted below.

5.1.3 Soft Site Selection – Identifying sites with development potential

This step first involves determining sites that were not considered to have development potential and were therefore NOT considered soft sites. Parcels that were deemed to be for civic use, institutional use, religious use, recently developed (from 2000 and newer), of heritage value (i.e. designated), or that were significanlly constrained by environmental features were not considered as soft sites. Parcels within areas considered as stable residential areas were also not considered as soft sites. For Corridors, parcels that did not front onto the public right-of-way were not identified as soft sites. The remaining parcels were then evaluated for their development potential and included as soft sites. Parcels that were most suitable as soft sites were located on major roads, vacant lots, underdeveloped downtown properties, or consisting of expansive surface parking lots (stand alone or serving commercial development).

5.1.4 Potential Intensification – Applying development Typology to soft sites

Once soft sites were identified, an intensification typology was applied to those sites. The following typologies have been used in the Study, and are described in Section 5.4:

- Traditional Townhouses
- Stacked and Back-to-Back Townhouses
- Mid-rise
- High-rise
- Tower
- Mid-rise Employment
- Major Office
- Nodal Mixed Use

The densities assumed for each typology were based on a precedent review of recent developments within Durham Region, detailed in Section 5.2. The primary factor in determining what kind of typology was to be applied was the local character and context. For example, a soft site at a major intersection in an Urban Growth Centre was likely to be assigned a 'Tower' typology, but this would not be the case in a northern Regional Centre characterized by more modest densities and building heights, such as Sunderland or Beaverton, where a 'mid-rise' typology would be assigned. The southern municipalities were generally assigned higher intensification typologies due to their centralized contexts and better access to multimodal transportation, while the northern municipalities received intensification typologies more suited to their lower-density communities.

5.1.5 Gentle Infill Intensification – Secondary Units in Built Up Area

The BUA in Durham is characterized by a high proportion of ground related dwellings (single-detached, semi-detached and townhomes). Many of these units are eligible for secondary units, either as-of-right or through a planning approval process. The form of secondary units could be through the addition of secondary suites within existing houses, granny flats or laneway housing. These units can represent a statistically significant potential supply of ground related low-density intensification units over the planning forecast period. These units are factored into the potential supply with the following steps:

1. Calculate the number of ground-related units in the Region of Durham BUA
2. Assume 3% of units are likely to incorporate a second unit by 2051
3. Apply the percentage to the potential supply of ground-related units

The resultant figure is calculated for each area municipality, and is added to overall potential supply of units in the final summary.

The assumption of 3% secondary units, builds from analysis conducted in previous Durham Region Growth Management Study, which in 2007 assumed 2% of ground-related units would accommodate a secondary unit. While detailed data on actual numbers of secondary units in Durham is not consistently available, given the increased intensification demand, a focus on inclusionary zoning and the forecast population growth, the study has made a conservative assumption that a modest increase in the level of secondary suites or 'gentle infill' intensification will occur.

The supply of secondary units is driven in part by the increasing cost of ground-related dwellings, as owners are incentivized to introduce second units in order to offset their mortgage payments. Demand for these units is driven in part by tenants seeking ground related units, but whom have been priced out of the traditional ground related units.

The CHMC has released a report on secondary units in Ontario[40] demonstrating variable rates of second units across Ontario. Rates for Durham include Oshawa (7.7%), Ajax (6.4%) and Whitby (3.7). While not contained in the CMHC report, It is assumed that the rates for the Northern Municipalities would be lower than the above reported numbers. In the absence of complete data for the other municipalities, it is conservatively estimated that the figure would be around the 3% range. This rate could increase if there is a continued trend in the uptake of secondary units.

5.1.6 **Local Area Intensification – Local Centres and Local Corridors**

While the Housing Intensification Study has focused in greater detail on UGCs, Regional Centers, MTSAs, Waterfront Places and Regional Centres, the Local Centres and Corridors also represent a measurable contribution to the potential supply of units in the BUA across the region. The methodology for incorporating this capacity is based on a simple assessment of recent growth in Local Centres and Corridors and projecting that forward across the forecast period.

1. Map the location of building permits across the Region of Durham from 2012 to 2019.
2. Identify the number of units built within Local Centres and within a buffer from the Local Corridors
3. Calculate the per annum units constructed in the Local Centres and Local Corridors
4. Multiply the per annum to the number of years in the forecast period

The resultant figure was calculated for each area municipality and added to the overall potential supply of units. In places where a Local Centre falls along a Regional Corridor, the potential growth in the Centre was assessed in more detail as part of the Regional Corridor.

[40] Secondary Units in Ontario: municipal estimates and what contributes to disparities, CMHC, June 2, 2021. https://www.cmhc-schl.gc.ca/en/blog/2021/secondary-units-on-municipal-estimates-what-contributes-disparities

5.1.7 **Aligning with Demand Forecast**

In determining the total demand for housing within the region's BUA, as well as the expected mix of housing types, the following analysis was conducted:

1. The population and employment forecast within Schedule 3 of the Growth Plan, for Durham Region was applied, at a population of 1,300,000 and total employment of 460,000 by 2051.
2. A total housing forecast was then derived based on various assumptions regarding macro-economic trends, growth drivers and disrupters in Durham Region, forecast net migration and natural increase (births less deaths) trends, and headship rates.[41]
3. In developing the housing mix forecast, consideration was given to the PPS with regard to housing policy and the need to provide a range of housing options to meet market-based needs of current and future residents (Policy 1.4.3). As previously discussed, residential development within Durham Region is anticipated to continue to shift away from low-density housing forms, largely driven by demand for affordable housing options as well as increased demand for high-density housing associated with the 25-34 and 65+ population groups.
4. Forecast housing mix within Durham Region has also been developed to conform with the Growth Plan, with Durham Region accommodating a minimum of 50% of its residential growth between 2022 and 2051 through intensification.
5. In line with changing housing demand towards higher-density dwelling types, the shift in the share of medium- and high-density housing forms is anticipated to be more pronounced in the Region's BUA largely due to the greater number of infill or soft site opportunities, stronger market demand and available infrastructure, transit, and other amenities and services to support residential intensification in these areas.
6. The Region-wide housing forecast of new dwellings to 2051 by density type is expected to be accommodated through 47% low-density dwellings, 29% medium-density and 24% high-density. Within the BUA, the housing unit mix of new housing units is forecast to be comprised of 3% low-density, 18% medium-density and 79% high-density.
7. With consideration of the above, as well as a review of active development applications and historical building permit activity in the BUA and DGA, a housing mix forecast was developed for Durham Region which accommodates the residential intensification target of 50%, under the Growth Plan.
8. To achieve an intensification target of 50% for Durham Region, an increasing amount of high-density development will be required over the forecast horizon, largely being accommodated throughout the region's BUA. Furthermore, to provide a range of housing options within the region's BUA, approximately one-third of the medium-density housing unit forecast is anticipated to occur within the BUA.

[41] A headship rate is defined as the number of primary household maintainers or heads of households by major population age group. The headship forecast forms the basis for determining the demand for new households generated from population growth. Dividing total units over population generates the resulting long-term PPU for the Region from 2016 to 2051

The initial results of the soft site analysis were then reviewed and further adjusted to ensure that the applied soft site typologies and overall development yields reflected the forecasted unit mix described above.

5.1.8 Calculate Summary – Estimate yield and density for units, people and jobs

The final step is to calculate the total number of units, people and jobs for the entire BUA within the Region. Outputs from each stage of analysis were combined into data tables that summarize overall potential intensification supply. [42]

Figure 5-2: Intensification Summary Units Calculation Formula

Housing Intensification Study Summary Calculation Formula: Units								
Area	**Existing**	**(Net Out)[28]**	**Soft Sites**	**Pipeline**	**subtotal**	**(DGA)**	**Intensification**	**% Total Intensification**
MTSA	A	B	C	D	A-B+C+D =E	F	(C+D)-(B+F) = G	G/Region Total = H

5.1.9 Review Density Requirements – Check outcome against minimum densities

The number of people and jobs was divided by the gross (ha) area of each delineated area . This provided an output for density. The minimum density requirements for each area, either under the Growth Plan or the existing ROP, were compared to the density results from this analysis, and refinements to soft site selections and typologies were made if necessary to achieve policy conformity.

5.2. Density Precedents

To ensure the density and other assumptions applied to the soft sites were current and relevant to the context, a review of recent developments in Durham Region was undertaken. The following are a sample of these precedents and provide a current snapshot of the scale and form of development through intensification taking place across Durham Region today. For each precedent example, data on the density (FSI and units/ha) and height was assessed along with site and building images.

[42] Net Out refers to the existing residential units or people within a soft site. These units or people are subtracted from the total intensification summary uplift.

5.2.1 **Towers**

Figure 5-3: Tower Typology Precedent

Pat Bayly Square Total Site,
73 Bayly Street, Ajax

Development Area: 2.6 ha
460 units/ha
3.8 FSI

Tower A & Tower B

Tower A

25 storeys
272 units
Lot Area: 0.46 ha
591 units/ha
5.9 FSI

Tower B

25 storeys
208 units
Lot Area: 0.42 ha
726 units/ha
5.7 FSI

Tower C

Tower C

23 storeys
325 units
Lot Area: 0.49 ha
771 units/ha
6.0 FSI

Tower D

Tower D

19 storeys
227 units
Lot Area: 0.47 ha
548 units/ha
4.4 FSI

5.2.2 **High Rise**

Figure 5-4: High Rise Typology Precedent

35-45 Division Street, Oshawa

12 storeys
100 units
Lot area: 0.16 ha (aggregated)
607 units/ha
6.81 FSI

1475, 1473, and 1485 Whites Road

12 storeys
227 units
Lot area: 1.1ha (aggregated)
205 units/ha
2.9 FSI

5.2.3 **Mid Rise Apartments**

Figure 5-5: Mid Rise Typology Precedent

109 King Avenue East, Newcastle

6 storeys (4 storeys residential, 2 commercial)
40 res units
Lot area: 0.44 ha
91 res units/ha
1.68 FSI

5.2.4 **Townhouses (Stacked and/or Back-to-Back)**

Figure 5-6: Townhouses (Stacked and/or Back-to-Back) Typology Precedent

1532 Kingston Road, Pickering

4 storeys
136 units
Lot area: 1.0 ha
136 units/ha
1.61 FSI

5.2.5 **Townhouses (Traditional)**

Figure 5-7: Townhouse (Traditional) Typology Precedent

1595 Green Road, Bowmanville

3 storeys
112 units
Lot area: 2.57 ha
43.54 units/ha
1.05 FSI

Nodal Mixed Use

Figure 5-8: Visualizaiton of Nodal Mixed Use at Thickson Road South and Nichol Avenue in Whitby

1 to 8 Storeys
Lot Area: 3.6 ha
FSI: 2.6

Major Office

Figure 5-9: Major Office Typology Precedent

1340 Pickering Pkwy, Pickering

10 storeys
Lot area: 0.485 ha
FSI: 3.64

Mid-rise Employment

Figure 5-10: Mid-rise Employment Typology

209 Dundas Street East, Whitby

5 storeys
5,600 sqm GFA
Lot area: 0.477 ha
FSI: 1.18

5.3. Assumptions

The following assumptions have been key inputs to the Housing Intensification Study and are based on the precedent analysis, review of recent development applications and market trends, and analysis included as part of the Growth Forecast. These assumptions are reflected in the model used to calculate the potential for units, people, and jobs in the housing intensification study.

Figure 5-11: Assumptions Relating to the Calculation of Intensification Across Typologies

	Description	Value	Source
Prototypical Development Area dimensions	On large soft sites, a unit of area to which density figures are applied and potential supply-side intensification capacity is calculated	0.5 ha (100m x 50m)	USI
Gross to net site factor	Factor that accounts for future public roads and/or dedicated parks on large sites	0%-40%	USI
Low density intensification factor	For low-density residential areas in the BUA the growth factor that accounts for gentle intensification (e.g.; secondary units)	3%	USI
Building typologies	The set of built-form types that are applied to soft sites	8 types	USI
Units per hectare (UPH)	Determined per residential typology and applied to the residential share of a soft site	Varies per typology	USI
Floor Space Index (FSI)	Determined per residential typology and non-residential use precedents	Varies per typology	USI
Number of Storeys	The range of storeys associated with each typology	Varies by typology	USI
Non-Residential share of net site	For any soft site, the proportion of non-residential uses	Varies	USI
People per unit (PPU)	Determined per local area municipality and determined through demographic/market analysis	Varies per Local Area Municipality	Watson
Floorspace per worker	Determined per employment class	Varies per employment class	Watson

Figure 5-12: Development Assumptions by Typology

Building Typologies	Number of storeys	Gross site to net site factor*	Floor Space Index (FSI)	Non-Res GFA Share**	Units per Hectare (UPH)	People per Unit (PPU)	Floor space per worker (FSW)[43]
Tower	Over 12	40%	6.0	0.1 (10%)	600	1.47 – 1.78	35
High rise	7-12	25%	2.5	0.1 (10%)	350	1.47 – 1.78	35
Mid rise	3-6	25%	1.0 or 2.0***	0.2 or 0.3 (20% or 30%)	125	1.47 – 1.78	35
Stacked or Back-to-Back Townhouse	2-4	0%	1.0	0	85	2.55 – 2.98	-
Traditional Townhouse	2-4	0%	1.0	0	50	2.55 – 2.98	-
Major Office	7-12	40%	2.5	1 (100%)	n/a	n/a	19
Employment Intensification	2-12	40%	2.5	1 (100%)	n/a	n/a	19
Mid-rise Employment	3-8	25%	2.0	1 (100%)	n/a	n/a	56
Nodal Mixed-Use	Min 3 (res. component)	40%	2.0	0.5 (50%)	350 (on res share)	1.47-1.78	35

* On soft sites within an existing heritage district, the Gross Site to Net Site Factor is increased to 50%.

** all sites assigned a non-residential share are mixed use. Grade related housing development potential is considered to be purely residential. Non-res GFA is assumed to be located on the ground floor of all buildings, on average. For the Mid-rise typology, this share varies between 0.2 – 0.3 of total GFA, as buildings in the northern Municipalities (Uxbridge, Scugog, and Brock) are considered to be closer to 3 storeys in height.

*** FSI assigned to Mid-rise is reduced for the northern Municipalities (Uxbridge, Scugog, and Brock) to 1.0.

5.3.1 What is a soft site?

Soft sites fall into three categories:

- Vacant sites
- Underutilized sites, and potentially including recent commercial developments
- Existing low-density sites that may be appropriate for intensification:
    - Close to transit stations

[43] Source: Derived from 2018 Durham Region Employment Survey (DRES) employment and floorspace data, and Durham Region Employment Land Inventory and building foorprint spatial data by Watson & Associates Economists Ltc. Total employment from the 2018 DRES includes all full-time and part-time on-site, off-site and seasonal employment associated with the businesses located on the surveyed sites.

- Part of fragmented blocks
- Front onto major streets

5.3.2 What is not a soft site?

Sites that are not considered soft sites include the following:

- Recent, major residential developments
- Recognized heritage or other cultural heritage assets
- Dedicated civic/institutional sites and parks
- Stable low-density residential neighbourhoods
- Significant environmental areas/features

5.4. Typologies

Seven typology categories were developed to represent the primary existing and anticipated forms of intensification development in Durham. These typologies have variable adjustments based on the local municipality, but are generally consistent across the region. Typologies are intended to represent an average form across Durham, recognizing that towers in the Urban Growth Centres of Pickering or Oshawa may be expected to be taller than the built form in Clarington, for example. The built form and density in Durham is typically taller and higher in Urban Growth Centres, but also geographically moving west to east and south to north. The assumptions attempt to account for these local variations. These typologies and their assumptions were developed in consultation with staff from the Region of Durham and the Area Municipalities.

5.5. Built Form Typology Assumptions

The following typologies and related metrics are averages based on a review of over 50 development/application precedents across the Region. This analysis was undertaken to determine development density assumptions for the various intensification typologies. Figure 5-9 summarizes these assumptions, while the following descriptions provide a more detailed explanation of each typology.

5.5.1 Traditional Townhomes

Traditional Townhomes are assumed at 2-4 storeys, have 0% gross to net site factor, a 1.0 FSI, no non-residential share, and a density of 50 units per net hectare. These typologies are assigned where transition to low-density neighbourhoods is appropriate, and where Stacked or Back-to-Back Townhomes are not assumed given the local context. This typology is generally applied on local roads, on the edges of SGAs or within corridors and is assumed as medium density housing.

5.5.2 **Stacked or Back-to-Back Townhomes**

Stacked or Back-to-Back Townhomes are assumed at 2-4 storeys, have 0% gross to net site factor, a 1.0 FSI, no non-residential share, and a density of 85 units per hectare. These typologies are assigned where transition to lower-density neighbourhoods is appropriate. These typologies are occasionally located within Centres, MTSAs, and UGCs, and are used to frame local roads and some corridors. Frequently, these typologies are located behind mid-rise or high-rise sites that front onto major corridors. This typology is considered medium-density.

5.5.3 **Mid-rise**

The Mid-rise typology represents a form of development characteristic of traditional main streets and corridors, with 3-6 storeys facing a street, an FSI of 1.0 or 2.0 and a non-residential share of 20% to 30%. These non-residential values reflect the assumption of non-residential uses on the ground-floor, which occupies a higher portion of the overall GFA in buildings with fewer storeys. This typology utilizes varied rates, however, with northern municipalities being assigned a 1.0 FSI and 30% non-residential factor. A density of 125 units per net hectare is assumed. FSW is assumed at 35 square metres per worker. This typology is also used along urban corridors and provides a level of transition from High-rise sites to lower density areas. This typology is considered to be a high-density form of housing.

5.5.4 **High-rise**

The High-rise typology is the second most dense residential typology. The sites to which the high-rise typology is applied are envisioned to develop at as 7-12 storeys with an FSI of 2.5, and have a moderate gross to net site factor at 25%. High-rise sites are assumed to have a 10% share of GFA as non-residential. A density of 350 units per net hectare is assumed. FSW is assumed at 35 square metres per worker. High-rise buildings are applied in SGAs at intersections, and provide a level of transition from Towers to lower density areas.

5.5.5 **Towers**

The Tower typology represents building forms with the highest residential density. They are over 12 storeys in height, have an FSI of 6.0, and have a high gross to net site factor of 40%. Towers were assumed to have a 10% share of GFA as non-residential. A density of 600 units per net hectare is assumed. A floor space per worker (FSW) is assumed at 35 square metres per worker. Towers are generally applied in close proximity to MTSAs and within SGAs at key intersections.

Figure 5-13 Typology Built Form Case Study Findings

Typology	Storeys	Net Site UPH (revised)	Net Site UPH (range)	Net Site FSI	Net Site FSI (range)
Traditional Townhomes	2-4	50	27-70	1.0	0.5 – 1.4
Stacked or BTB Townhomes	2-4	85	21-140	1.0	0.4 -1.5
Mid-rise	3-6	125	64-337	1.0 or 2.0	0.6 - 3.4
High-rise	7-12	350	103-856	2.5	0.4 - 6.1
Towers	Over 12	600	340-1000	6.0	3.2 - 12.2

5.5.6 Major Office/Employment Intensification

The Major Office and/or Employment Intensification typology is applied at locations where there is an existing commercial use in close proximity to an existing or future transit station, and where a high-density form of office/employment is desired. These sites are typically located within or adjacent to MTSAs and UGCs. The use of “Employment Intensification” in place of “Major Office” anticipates circumstances where a major office building may not be viable, but another form of intensified employment use, such as intensification of an industrial or warehousing use to advanced manufacturing facility with greater employee density could occur, in particular in close proximity to higher order transit stations. These terms are used interchangeably, as the metrics are identical. This typology assumes 7-12 storeys, a 40% gross to net site factor, a 2.5 FSI, 100% non-res GFA share (no residential component), and an FSW of 19 square metres per worker.

5.5.7 Mid-rise Employment

The Mid-rise Employment typology is applied to locations where commercial intensification is viable and desirable, but not to same extend as the Major Office/Employment Intensification typology. This typology assumes 3-8 storeys, a 25% gross to net site factor, a 2.0 FSI, 100% non-res GFA share (no residential component), and an FSW of 56 square metres per worker.

5.5.8 Nodal Mixed Use

The Nodal Mixed-use typology is generally applied to existing retail plazas and big box retail centres in Centres and Corridors. These are areas that could be intensified with a mix of commercial and high-density residential buildings in a more urban form over the forecast term. In some places, this typology could take the form of mixed use high-rise and tower developments infilling existing parking lots that serve existing large-format retail stores. In other places, existing large-format retail plazas could be redeveloped with mixed-use buildings containing high-density residential components. In addition, this typology is proposed in areas,

including MTSAs where a horizontal or vertical mix of employment and residential uses is planned. This typology has a minimum of 3 storeys for the residential component, 25% gross to net site factor, a 2.0 FSI, 50% non-residential GFA share, 125 units per net residential hectare, and a FSW of 35 square metres per worker. A visualization of the intensification potential of the Nodal Mixed Use typology can be found below in section 5.7.

5.6. Prototypical Development Areas

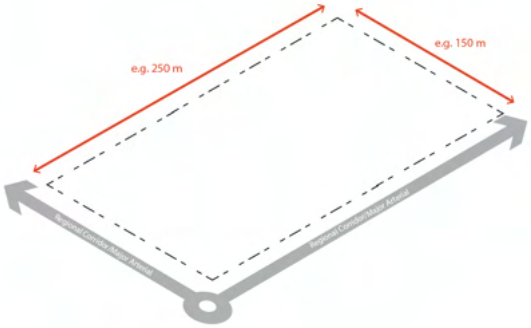
Applying a single density or typology to a large parcel may misrepresent its intensification potential, or require more description of how that density may be deployed from a land use and built form perspective. By dividing large sites into prototypical development areas of generally 50 metres by 100 metres, the development potential of a large contiguous parcel can be assessed at a finer-grain more typical of intensification and urban development.

To illustrate how the soft site analysis was deployed, the following is an example of how this approach was applied to a soft site in Ajax.

Figure 5-14: Large Soft Site in Ajax

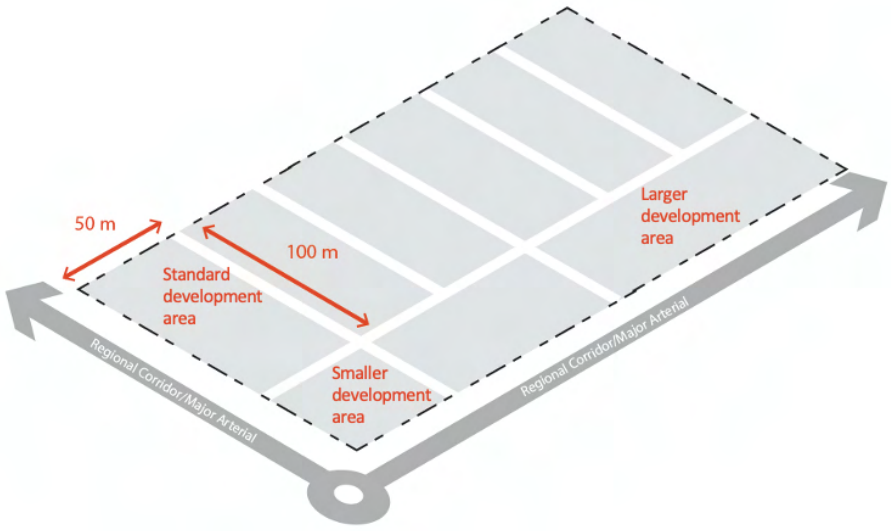
Harwood Plaza at the northwest corner of Harwood Avenue South and Bayly Street represents an opportunity for intensification. However, applying one typology across the entire site would not appropriately represent the likely potential of the site. It is therefore subdivided into prototypical development sites that can be evaluated contextually.

Figure 5-15: Large development site diagram showing a site 150m by 250m



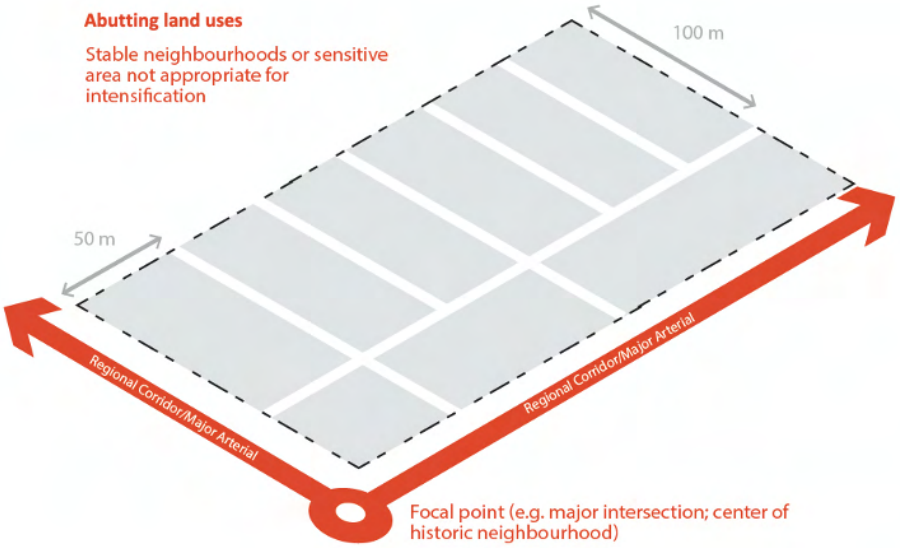
A prototypical development area of 100 by 50 metres was established to represent the typical dimensions of an average urban block (see Figure 5-14).

Figure 5-16: Large development site diagram subdivided into prototypical development areas



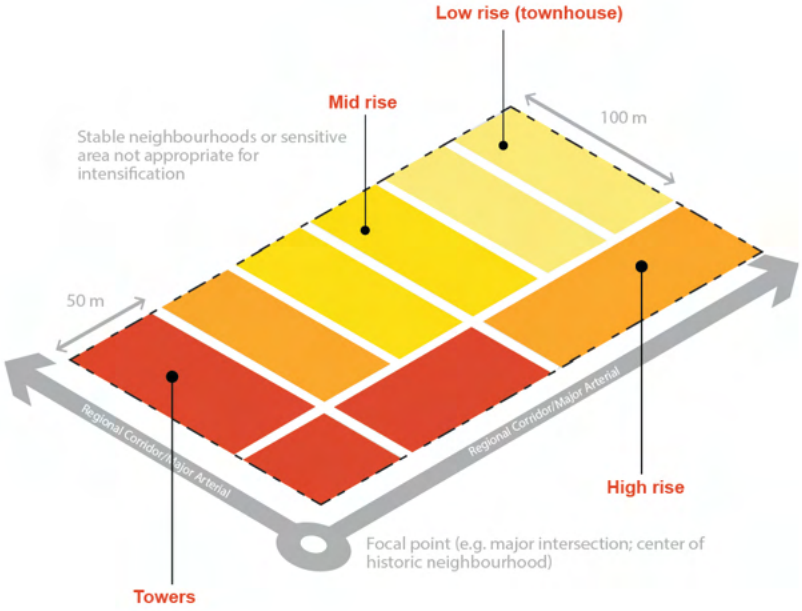
In some cases, due to varying parcel sizes and configurations, these broad assumptions were adjusted to account for local conditions.

Figure 5-17: Considerations for Typology application across development parcel



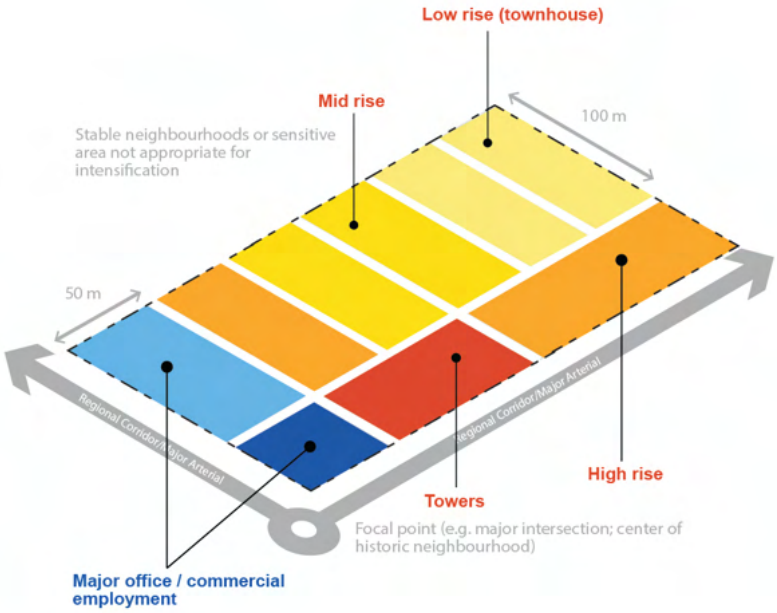
Major corridors and intersections were considered as focal points where higher density typologies would be appropriate. Lower density typologies were applied in proximity to low-rise neighbourhoods or sensitive areas where a transition in densities was considered appropriate.

Figure 5-18: Example of how densities were applied to a prototypical development site, with the highest densities located near the major intersection.



The highest densities are located next to major routes, intersections and focal points. Density transitions lower towards the stable neighbourhood or sensitive area, away from the major intersection.

Figure 5-19: Typologies applied based on site context



Depending on the context of the site, employment (including Major Office, for example) Typologies may also be appropriate.

A more detailed demonstration of how the methodology was applied to a Centre and a Corridor is included in Appendix B.

5.7. Visualizing Intensification

Intensification within Durham's BUA has been ongoing for many years and as the housing demand forecast has indicated, the density of built form and rate of intensification has been increasing in the last 10 years. However, to enable an understanding of what intensification could look like with the Region's MTSAs, Centres and Corridors, several visualizations of areas with signficiant potential for intensification, as identified through this study, have been prepared.

These include a visualization of intensification at the Ajax GO MTSA (Figure 5.20), King Street West Corridor in Oshawa (Figure 5.21), at the Thickson Place plaza near Dundas Street and Thickson Road in Whitby, illustrating Nodal Mixed Use intensification (Figure 5.22) and more modest, context responsive infill potential in northern communities as illustrated at a Water Street and Highway 7A street site in Port Perry (Figure 5.23)

5.7.1 **Centre and Corridor Visualizations**

Figure 5-20: Visualization of the Intensification Potential at the Ajax GO MTSA

Figure 5-21: Visualization of Intensification Potential of the King Street West Corridor from Bond Street West to Nassau Street

Figure 5-22: Visualization of Intensification Potential at Dundas Street and Thickson Road in Whitby (Predominantly Nodal Mixed Use)

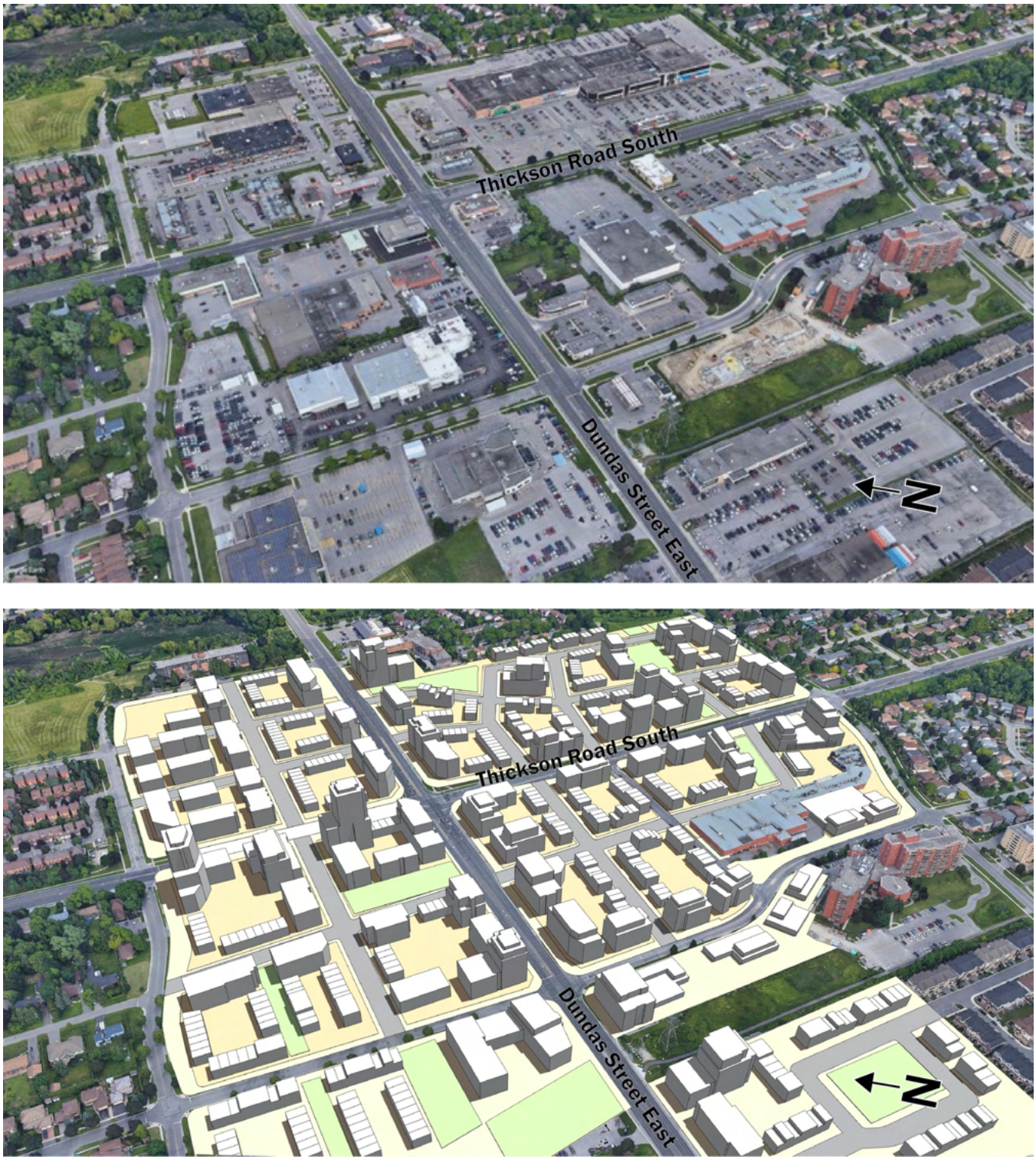


Figure 5-23: Visualization of Intensification Potential at Water Street and Highway 7A in Port Perry

6. Housing Intensification Analysis

The following chapter outlines the findings of the Housing Intensification Study. The Study and analysis began in January 2020 and throughout the process, methodology assumptions and procedures have been refined and adjusted in consultation with the Region of Durham and staff from the area municipalities. The process has involved multiple rounds of review, including data refinements, adjustments to soft sites, and the application of typologies based on input from area municipal staff in order the outputs align with the local insights and policy intent /direction for the municipal urban structure.

6.1. Current State (Methodology Step 1)

A baseline figure for population, units, and jobs is necessary for evaluating the ultimate output population, units and jobs through the period of the study. The figures were determined through Census data, Regional and municipal reports, and the Envision Durham discussion papers. The data is available in Appendix A.

6.2. Pipeline Projects (Methodology Step 2)

Pipeline data was assembled over the course of the study, beginning with set of data provided by the Region. This was then compared with active development proposals listed on municipal websites, and was revised in response to comments from AMWG representatives. The following data table is a summary of the Pipeline table incorporated in the Housing Intensification Study Model.

Figure 6-1: Units, People and Jobs in Pipeline Projects Summary (within Built Up Area)

Summary Active Developments (Pipeline) (Rounded to nearest ’00)			
Area	**Units**	**People**	**Jobs**
Pickering	15,100	28,100	2,800
Ajax	7,000	12,300	400
Whitby	4,600	8,500	700
Oshawa	9,800	19,400	2,445
Clarington	2,500	3,800	300
DURHAM*	**39,000**	**72,100**	**6,600**

*Table does not add due to rounding

The number of people is calculated based on the number of units multiplied by the rate of people per unit (PPU) provided in the Region-wide Growth Analysis. The PPU rate varies by housing type and is specific to each area municipality. This data is categorized by SGA and area municipality and is factored into the summaries for each.

6.3. Soft Site Selection

In order to assess soft sites and their respective typologies across the Region, an online portal through ArcGIS Online was utilized. The web portal centralized and assembled relevant data layers including the delineated boundaries of canadiate SGAs (i.e. UGCs, MTSAs, Regional Centres, where such boundaries were available), environmental protection areas, parcel data, and soft sites, with underlying satellite imagery. This web-based map was accessible by team members and area municipal representatives throughout the project. The web-based map allowed area municipal staff to review, evaluate and comment on proposed soft sites and typologies.

6.3.1 Initial Soft Site Identification and Typology Application (Methodology Steps 3 and 4)

The methodology for selecting soft sites is described in section 5.1.2. Once preliminary soft sites were selected, they were then evaluated for suitability through a desk top review, and through virtual ground truthing via Google Street View. Typologies were applied to sites based on their shape, size, and geographic contexts. Site visits were completed to evaluate certain soft sites. Sites and the applied typologies were refined several times through consultation, including through multiple rounds of review with staff from the Region of Durham and the area municipalities.

6.3.2 Consultation with Area Municipalities

Ongoing consultation with area municipal staff occurred throughout the study. The Project Team attended AMWG sessions, beginning in July 2019 through March 2021. The Project Team used these meetings to present proposed methodologies, revise soft sites, present data summaries, and respond to comments.

Comments from area municipal staff on the methodology, assumptions, and soft sites selection/typologies were sought on four occasions throughout the process. This input was utilized to refine the soft site analysis and confirm alignment with local insights including long term local planning directions. A summary of common themes and responses by the project team is included below.

Figure 6-2: Frequently Asked Questions and Responses related to Process

Comment	Response from Project Team
The project team should consider recently updated local Official Plan and Secondary Plan policies for intensification areas to better	Local Official Plan and Secondary Plans, where available, have been used to inform the identification of soft sites and typologies to ensure they maintain the intent of local planning policies.

Comment	Response from Project Team
reflect the local context of each area municipality.	
A simplified methodology is required for the northern Centres.	The Centres in northern Durham have been evaluated by applying typologies that are more appropriate for the local character, scale and context (e.g.: lower FSIs, limited site selection, and using midrise and townhome typologies only)
Clarification around the definition/criteria for stable neighbourhoods is requested. Has consideration been given to the transition of densities?	For the purposes of this Intensification Methodology, “stable neighbourhoods” are established, lower-density residential neighbourhoods that have built form that is primarily low-rise and internal from arterial roads. The housing stock in stable neighbourhoods may also have historical significance. This definition is derived from a review of language around stable and/or established neighbourhoods in local municipal official plans. Soft sites adjacent to stable neighbourhoods have incorporated transitions in scale and density, though the level of transition varies by policy area and local context.
Built form typologies may not be realistic for historic centres that may not experience significant intensification.	While historic centres may have more limited intensification potential, there are opportunities for infill and intensification. Assumptions for typologies have been adjusted as they apply to the northern municipalities. Typologies applied in historic centres considered sensitive to existing character form and are intended to provide for transition to the existing built form.
Soft site selection methodology may not be appropriate in [municipality].	Once soft sites are provided and categorized, review and input was requested from the Area Municipality Working Group (AMWG) in ground-truthing the proposed typologies. Soft sites were vetted on multiple occasions by area municipal satff.
FSIs provided in the methodology are too high.	A full scan of the region was conducted to determine density precedents across municipalities, which informed the FSI assumptions. Adjustments were made based on specific examples. Municipalities were encouraged to provide additional density precedent examples.
FSIs may not be the best measurement to use.	FSI is not used in determining the number of units or people. Units per hectare was used in determining units and people. FSI was only used in determining the non-residential GFA, which was translated into the number of workers using Floorspace per Worker. Residential GFA was calculated, but this metric was not translated into units or people.

Comment	Response from Project Team
The current intensification exercise may over-assume what is practical for some local area municipal candidate SGAs, which vary in size, capacity and character across Durham.	Through the soft site selection process, the project team reviewed the distinct local characteristics of each candidate SGA in this analysis. This is a potential supply side analysis, balanced by a market demand analysis. In addition, area municipal staff were provided with the opportunity to provide their local knowledge and expertise through multiple rounds of review and commenting on the soft site selection and assigned typologies.
How does the study account for complete communities' principles and the inclusion of new parks, school, community facilities, etc.? Similarly, the Gross to Net calculation may need to be reconsidered to account for natural heritage, road access, etc.	The Gross Site to Net Site Factors in the Methodology have been reviewed to consider parks, community facilities, road access, etc.
Will local area Official Plan policies be required to change to implement the soft site intensification?	This exercise was not intended to prescribe local OP designations, but rather demonstrate how typologies could be accommodated within the delineated area. Local planning would need to occur to determine how further intensification can occur through future local OP conformity exercises.
Why was Nodal Mixed-Use added as a typology?	This typology reflects existing commercial areas that are intended to continue to provide significant commercial activity, but also incorporate a component of high-density residential intensification. These areas are generally big-box commercial plazas within or adjacent to candidate SGAs.
Why was Major Office added as a typology?	The Major Office typology was applied to locations in close proximity to existing and/or future transit and near high-density residential. These areas are suitable for high-density office employment uses owing to their visibility and connectivity. This typology was applied primarily within MTSAs and UGCs.
Why was Mid-rise Employment added as a typology?	This typology is applied where local market or context factors limit the intensity of commercial growth, but where some level of intensification is desirable and appropriate. This typology is utilized in areas that have existing commercial uses that are likely to to remain commercial through the growth forecast period.
Why was Employment Intensification added as a typology?	This typology is applied where commercial/industrial uses exist today, and where there are market and policy support for intensifying employment use through the forecast period. The assumptions used in this typology are identical to the Major Office typology, though the expectant built form may be stand alone office or a range of employee intensive uses that would appropriate in particular in

Comment	Response from Project Team
	context of proximity to higher order transit such as GO Stations/MTSA

6.3.3 Revised Soft Sites

The AMWG were asked to review the recommended soft sites and typologies and provide their comments, either directly in ArcGIS Online web-view or in another format that the Project Team could review. Comments regarding active development applications, adding or removing soft sites, or changing the typology applied to a soft site were generally accepted and incorporated.

Comments that requested a specific and detailed change to the metrics/core assumptions of any given typology for a specific site or a specific local area were not incorporated as this was beyond the scope and detail of the study. The typologies were based on a region-wide development precedent review of existing and future developments and represent the typical form of development that can be expected. Revising the typologies on a site-by-site or area-by-area basis to replicate the detailed permissions or density ranges of an area municipal official plan, for example, is not necessary at this scale of regional analysis.

6.4. Intensification Potential

This section reviews the output data from the Housing Intensification Study. Potential intensification supply data is provided region-wide and by area municipality. The full data package is available in Appendix C of this Report.

6.4.1 Soft Site Analysis: Summary by Area Municipality

Figure 6-3: Soft Site and Pipeline Potential Unit Intensification by Area Municipality

Soft Site and Pipeline Unit Potential Intensification Supply by Area Municipality
(Rounded to nearest ’00)

Category	Pickering	Ajax	Whitby	Oshawa	Clarington	Uxbridge	Scugog	Brock
Centres	11,700	21,600	15,300	25,100	25,000	500	1,800	300
Corridors	15,000	2,100	9,800	14,000	6,300	-	-	-
Pipeline	15,100	7,000	4,600	9,800	2,500	-	-	-
(DGA)	-	(800)	(1,600)	-2,800	(14,700)	-	-	-
(Net Out)	(500)	(300)	(100)	(300)	-	-	-	-
Total*	**41,300**	**29,600**	**28,100**	**45,800**	**19,000**	**500**	**1,800**	**300**

*May not add up due to rounding

Figure 6-4: Soft Site and Pipeline Potential Population Intensification by Area Municipality

Soft Site and Pipeline Potential Population Intensification by Area Municipality (Rounded to nearest ’00)								
Category	**Pickering**	**Ajax**	**Whitby**	**Oshawa**	**Clarington**	**Uxbridge**	**Scugog**	**Brock**
Centres	20,800	38,800	25,600	45,100	37,900	1,200	3,800	500
Corridors	29,200	4,900	17,100	26,600	11,800	-	-	-
Pipeline	28,100	12,300	8,500	19,400	3,800	-	-	-
(Net out)	(900)	(700)	(200)	(600)	-	-	-	-
(DGA)	-	(1,700)	(2,400)	(6,621)	(23,700)	-		-
Total*	**77,300**	**53,700**	**48,600**	**83,800**	**29,700**	**1,200**	**3,800**	**500**

*May not add up due to rounding

6.4.2 Gentle Intensification: Secondary Units in build-Up Area (Methodology Step 5)

A 3% rate was applied for gentle infill intensification in the region. The unit data is included below.

Figure 6-5: Gentle Infill Potential Intensification in Durham

Built-Up Area (BUA)				
Municipality	**Singles**	**Semis**	**Townhomes**	**Total BUA**
Pickering	19,725	2,492	4,536	26,753
Ajax	22,617	1,752	4,518	28,887
Whitby	28,775	1,121	5,613	35,509
Oshawa	33,384	5,780	7,606	46,770
Clarington	18,448	900	2,743	22,091
Scugog	2,736	115	300	3,151
Uxbridge	2,829	74	615	3,518
Brock	1,887	30	352	2,269
Durham Total	130,401	12,264	26,283	168,948
Gentle Infill Units*	**3,900**	**400**	**800**	**5,100**

*Rounded to nearest ’00; Table does not add due to rounding

6.4.3 Local Area Intensification (Methodology Step 6)

Local Area intensification includes the growth in Local Centres and Local Corridors within the BUA that are identified in the area municipal official plans. The Local Area Intensification growth has been tabulated using building permit data and GIS shapefiles from 2014-2019

regional building permit data. The building permits of interest for the Local Area Intensification were those that are within a Local Centre, as well as, those within a 100-metre linear measure from any Local Corridor (based on prototypical block measuring 100 m in depth).

The total number of building permits recorded from 2014-2019 that were within either a Local Centre or a Local Corridor (100-meter buffer) was 1,169 units. The building permits were typically for medium and low density built forms, such as Townhouses and Single-Detached Homes. In order to tabulate a simple projection of growth potential to 2051, the average 195 units per year was applied. On this basis, it was estimated 6,235 units could occur within Local Centres and along Local Corridors. These are incorporated as new builds, and not gentle intensification, which has been calculated in Methdology Step 5 separately.

Figure 6-6: Building permit data (units) for the Local Centres and Local Corridors

Local Area Intensification	Units (2014-2019)	Average unit growth per year (6 Years)	Units (Estimated for 2020-2051)	People (Estimated for 2020-2051)
Local Centres and Corridors	1,169	~195	6,235	10,474

6.4.4 Summary of Intensification Potential

The summary of the Housing Intensification Study steps 1 to 6, compiling or summarizing the above inputs, results in the following breakdown of intensification by area municipality.

Figure 6-7: Housing Intensification Potential Summary by Area Municipality

Intensification Analysis Summary: Units (Rounded to nearest '00)								
Category	**Pickering**	**Ajax**	**Whitby**	**Oshawa**	**Clarington**	**Uxbridge**	**Scugog**	**Brock**
Centres	11,700	21,600	15,300	25,100	25,000	500	1,800	300
Corridors	15,000	2,100	9,800	14,000	6,300	-	-	-
Pipeline	15,100	7,000	4,600	9,800	2,500	-	-	-
(Net out)	(500)	(300)	(100)	(300)	-	-	-	-
Subtotal	41,300	30,400	29,600	48,900	33,800	500	1,800	300
(DGA)	-	(800)	(1,600)	(2,800)	14,700	-	-	-
Gentle Intensification	800	900	1,100	1,400	700	100	100	100
Local Intensification	3,000	-	2,800	400	-	-	-	-
Total*	**45,100**	**30,500**	**31,900**	**47,600**	**19,700**	**600**	**1,900**	**400**

Source: Urban Strategies Inc., 2021.

*Table does not add due to rounding

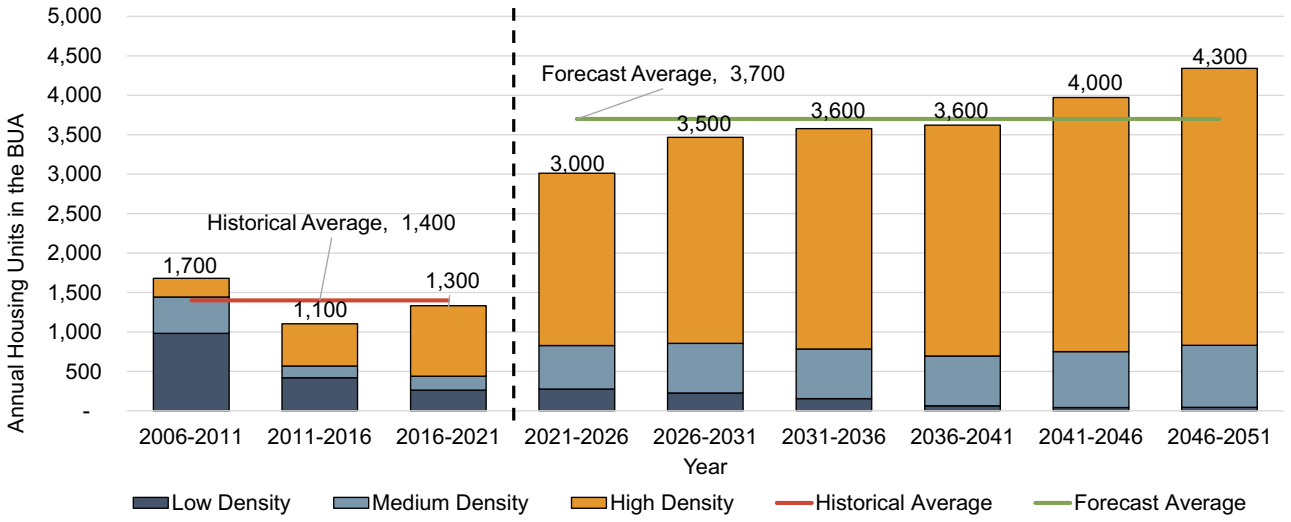
6.4.5 Demand Adjustment (Methodology Step 7)

As previously identified, forecast demand for housing intensification across Durham Region has been informed by a review of historical residential building permit activity in the Region's BUA and DGA since 2006, active development applications within the BUA, as well as consideration of the influence of longer-term demographic and socio-economic tends on future housing needs by geographic location and structure type. Figure 6-7 summarizes Durham Region's annual BUA housing forecast from 2022 to 2051. Key observations include:

- From 2022 to 2051, approximately 213,400 new housing units are expected to be constructed across Durham Region;
- Based on an intensification target of 50%, 106,700 units are forecast in the BUA between 2022 and 2051;
- The Regional intensification assumption of 50% was informed by the following housing forecast by structure type, with percentages representing the share of that housing type to be accommodated in the BUA compared to the total across Durham (i.e.: 92% of low-density housing units will be built outside the BUA):
    - 8% (3,800) low-density;
    - 29% (19,100) medium-density; and
    - 82% (83,800) high-density.

In addition to accommodating the potential supply of housing units within the BUA to achieve the Region's minimum 50% housing intensification target, the delivery of the housing forecast by structure type is also critical, in accordance with identified potential housing supply opportunities and anticipated market demand. The first pass of the potential intensification housing supply assessment completed as part of this study assumed a greater proportion of high-density housing than the 2051 housing intensification demand forecast.

Figure 6-8: Durham Region BUA Housing Forecast, 2021 to 2051



Low density is comprised of singles and semi-detched
Medium density is comprised of townhouses
High density is comprised of apartments. Secondary units are now captured within the low density categorization
Source: Historical figures derived from Durham Region building permit data. Forecast (2021 to 2051) estimated by Watson & Associates Economists Ltd., 2020.

6.4.6 Adjustments for Medium Density Housing Form

The Potential Supply analysis has been aligned with the Demand analysis by adjusting assumptions about building typologies applied to ensure a minimum amount of potential supply by housing type is provided within the region. An initial deficit of medium density housing units was identified when the potential supply and demand forecast analysis were compared. Recognizing this deficit, a region-wide review was conducted to consider soft sites for their suitability as medium-density townhome sites, rather than high-density or tower sites. This review was based on meeting at least one of the following criteria:

- Appropriate transition to low-density areas
- Frontage/access to local roads
- Outside MTSAs and UGCs (generally)

On this basis, sites which had originally been identified in the soft site analysis as Mid-rise and High-Density sites were assigned the Stacked and Back-to-Back Townhome Typology.

The adjusted regional potential intensification supply meets the minimum number of required units by type to achieve the 50% intensification rate by 2051 while also including an appropriate housing unit mix informed by market demand. The following table represents the Demand Adjusted Regional Potential Supply output from the Housing Intensification Study, adjusted to provide minimum amounts of each form of housing (low, medium, and high-density).

Figure 6-9: Refined Potential Housing Intensification Study Output by Housing Category

Demand Adjusted Potential Supply of Housing Units by Category in Built Up Area (Rounded to nearest '00)									
Density	Pickering	Ajax	Whitby	Oshawa	Clarington	Uxbridge	Scugog	Brock	**TOTAL**
Low*	800	900	1,100	1.400	700	110	100	70	5,900
Medium**	7,200	2,600	7,200	6,100	1,900	300	800	500	26,000
High***	37,700	27,300	24,800	40,300	17,200	200	1,000	300	147,800
(Net out)	(500)	(300)	(100)	(300)	0	0	0	0	(1,200)
TOTAL	45,100	30,500	31,900	47,600	19,700	600	1,900	400	177,700

Source: Urban Strategies Inc., 2021.
***Low Density:** Single- and Semi Detached, Gentle Intensification Units
****Medium Density:** Traditional Townhouses, Stacked and Back-to-Back townhouses, Local Centres and Corridors
*****High Density:** Mid-rise, High-rise, Tower, Nodal Mixed Use

Figure 6-10: Demand Adjusted Potential Supply Output for the Region of Durham

Category	**Units***	**People***
Total Potential Soft Sites Supply	148,500	263,300

Net Out[44] (removed from Intensification)	(1,200)	(2,300)
Pipeline	39,000	72,100
Gentle Infill Intensification	5,100	8,400
Local Centres and Corridors	6,250	10,500
DGA (removed from Intensification)	(20,000)	(34,500)
Total Potential by Intensification**	**177,700**	**317,500**

Source: Urban Strategies Inc., 2021.
*Rounded to nearest ’00;
**Table does not add due to rounding

6.4.7 Calculate Summary and Review Density Requirements (Methodology Steps 7 and 8)

The final step in the Intensification Analysis was evaluating projected density outcomes against any regional or provincial minimum density requirements. The table summarizing this data is available in **Appendix G.**

Based on the potential densities, MTSAs and UGCs are projected to meet the minimum density as prescribed by the Growth Plan.

[44] Net Out refers to the number of units and people replaced through development; only the net increase number of units and people can be counted towards intensification.

7. Intensification Findings

The Housing Intensification Study demonstrates that Durham Region has the capacity to accommodate significant levels of growth through redevelopment within the BUA to 2051 and over the long term to full build out. More specifically there is potential land capacity / unit supply to accommodate up to 177,700 units through intensification across the region over the long term.

From a potential unit supply perspective, this represents over 83% of the total number of units forecast for Durham to the year 2051. However, when market demand is considered – particularly the market preference for a broad range of housing choice including of low and medium density housing, (and since the market will likely have an upper limit on how much high-density residential units it can absorb) it is anticipated that the minimum 50% intensification target is appropriate and can be achieved over the 2022- 2051 period. To achieve this target 106,700 units will need to be accommodated within the BUA by 2051.

The greatest potential for growth within the BUA exists within MTSAs. MTSAs represent up to 45% of the Region's total potential intensification supply with approximately 48,300 units. The two UGCs (Pickering City Centre and Downtown Oshawa) offer a sizeable portion of potential intensification opportunity, representing 13% of the Region's total potential intensification supply with approximately 23,400 units.

Other locations that offer significant potential intensification supply include Regional Centres, such as Ajax Uptown Regional Centre, Ajax Downtown Regional Centre, Bowmanville West Urban Area, Downtown Whitby Major Central Area, Brock-Taunton Major Central Area and Oshawa Downtown Main Central Area.

In addition, certain Regional Corridors offer potential supply opportunities to accommodate significant mixed-use development through intensification, including Highway 2/Kingston Road/Dundas/King, segments of Bloor Street, Bayly Street, Brock Road, and Taunton Road.

Waterfront Places – with the exception of the Whitby Waterfront Place – do not represent areas where significant growth and intensification is expected to occur over the long term. Whitby's Waterfront Place is an exception due the significant boundary overlaps with the Whitby MTSA associated with the Whitby GO Station.

7.1. Regional Intensification Target

Durham Region has sufficient land suitable for intensification to achieve the minimum required rate of intensification (50%) contained in the Growth Plan. The minimum required number of units through intensification is 106,700 units. There is a total approximate potential supply of

177,700 units that could be achieved through intensification across the region. This represents an additional potential supply of approximately 71,000 residential units above and beyond the minimum required to achieve the Growth Plan intensification target of 50%. Employment Lands within MTSAs were assumed to be candidates for conversion and were incporporated as soft sites. There will be additional refinements to the residential intensification suppy following the determination of Employment Area conversion requests outside the MTSAs.

7.2. Area Municipality Potential Intensification Supply

While there is significant potential to grow through intensification at the regional scale, the intensification potential varies by area municipalities. The vast majority of intensification potential is in the southern Lake Ontario shoreline municipalities. A summary of intensification potential by area municipality is provided in table 7-1 below, with additional details available in **Appendixes C and D.**

Figure 7-1: Potential Housing Intensification (Supply) by Area Municipality

Potential Intensification Summary Unit Supply by Area Municipality		
Municipality	**Units***	**Share of Regional Potential Intensification Supply**
Pickering	45,100	25%
Ajax	30,500	17%
Whitby	31,900	18%
Oshawa	47,600	27%
Clarington	19,700	11%
Subtotal Southern Municipalities	174,800	98%
Brock	400	0.2%
Uxbridge	600	0.4%
Scugog	1,900	1.1%
Subtotal Northern Municipalities	2,900	1.7%
Total	**177,700****	**100%****

Source: Urban Strategies Inc., 2021.
*Rounded to nearest hundred
**Table does not add due to rounding.

7.2.1 **City of Pickering**

The City of Pickering has significant potential to accommodate intensification growth in particular within the Pickering City Centre UGC and MTSA associated with the GO Transit station, and along the Higher Order Transit (HOT) corridor of Highway 2/Kingston Road. As a result, Pickering has the second highest intensification potential among the area municipalities

at almost 45,100 units, as noted in Figure 7-2, or approximately 25% of regional potential intensification supply by 2051. The total potential housing units that could be accommodated in Pickering's candidate SGAs are approximately 43,400 as noted in Figure 7-3.

Figure 7-2: City of Pickering Potential Housing Intensification (Supply)

Pickering Housing Intensification Summary: Units (Rounded to nearest '00)										
	Centres	Corridors	(Net out)	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**% Regional Intens.**
Pickering	11,700	15,000	(500)	15,100	41,300	-	800	3,000	**45,100**	**25**

Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-3: City of Pickering Total Potential Units in Candidate Strategic Growth Areas

Pickering Total Potential Units in Candidate Strategic Growth Areas: MTSAs, Centres & Corridors* (Rounded to nearest '00)					
Candidate SGA	**Existing**	**Pipeline**	**Soft Sites**	**(Net Out)**	**Total**
Pickering MTSA	1,100	3,800	6,300	-500	10,700
Pickering City Centre Urban Growth Centre	2,100	5,300	10,700	-	18,100
Bayly St Segment 1	-	-	400	-	400
Bayly St Segment 2	-	1,700	-	-	1,700
Brock Rd Segment 2	-	1,400	1,800	-	3,200
Brock Rd Segment 1	-	-	3,500	-	3,500
Kingston Rd Segment 1	-	6,000	2,800	-	8,800
Kingston Rd Segment 2	-	200	5,500	-	5,700
Kingston Rd Segment 3	-	-	500	-	500
Whites Rd Segment 1	-	-	500	-	500
Whites Rd Segment 2	-	-	-	-	0
Total**	**2,100**	**15,100**	**26,700**	**-500**	**43,400**

* Table does not include gentle intensification/secondary units and local development.
** Has been adjusted to account for overlapping of candidate SGA's; For the purposes in the Intensification Analysis, the Total row is the correct output for the whole municipality; Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding; DGA Included in total
Source: Urban Strategies Inc., 2021.

7.2.2 **Town of Ajax**

The Town of Ajax has considerable potential to accommodate intensification growth in three key areas: Ajax Uptown Regional Centre, Ajax Downtown Regional Centre, and the MTSA. Ajax also has intensification potential along the BRT corridor of Kingston Road/Highway 2. Ajax has a total potential of nearly 30,500 units through intensification, as noted in Figure 7-4,

or 17% of regional potential intensification supply by 2051. The total potential housing units that could be accommodated in Ajax's candidate SGAs are upwards of 33,200, see Figure 7-5.

Figure 7-4: Town of Ajax Potential Housing Intensification (Supply)

Ajax Housing Intensification Summary: Units (Rounded to nearest '00)										
	Centres	Corridors	(Net Out)	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**% Regional Intens.**
Ajax	21,600	2,100	(300)	7,000	**30,400**	(800)	900	-	**30,500**	**17**

Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-5: Town of Ajax Total Potential Units in Candidate Strategic Growth Areas

Ajax Total Potential Units in Strategic Growth Areas: MTSAs, Centres & Corridors* (Rounded to nearest '00)					
Candidate SGA	**Existing**	**Pipeline**	**Soft Sites**	**Net Out**	**Total**
Ajax Uptown Regional Centre	400	-	11,900	-	12,400
Ajax Downtown Regional Centre	2,400	4,500	4,600	-300	11,200
Ajax MTSA	-	1,000	5,000	-	6,000
Bayly St Segment 3	-	-	0	-	-
Bayly St Segment 4	-	-	300	-	300
Harwood Ave Segment 1	-	100	100	-	200
Kingston Rd Segment 4	-	200	500	-	700
Kingston Rd Segment 5	-	-	600	-	600
Salem Rd Segment 1	-	50	-	-	50
Salem Rd Segment 2	-	-	-	-	-
Taunton Rd Segment 1	-	400	-	-	400
Taunton Rd Segment 2	-	-	-	-	-
Taunton Rd Segment 3	-	100	-	-	100
Westney Rd Segment 1	-	-	100	-	100
Westney Rd Segment 2	-	200	500	-	700
Total**	**2,800**	**7,000**	**23,700**	**-300**	**33,200**

*Table does not include gentle intensification or local development
** Has been adjusted to account for overlapping of candidate SGA's; For the purposes in the Intensification Analysis, the Total row is the correct output for the whole municipality; Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

7.2.3 **Town of Whitby**

Like Ajax, the Town of Whitby has considerable intensification potential, which is primarily spread across four candidate SGAs: Downtown Whitby Major Central Area, Brock Taunton

Major Central Area, Whitby Waterfront Place, and Whitby MTSA. The MTSA and Waterfront Place overlap significantly. Whitby also has significant intensification potential along designated Regional Corridors, notably Dundas Street east of Garden Street. Whitby has a total potential intensification supply of nearly 31,900 units, as noted in Figure 7-6, or 18% of regional potential intensification supply by 2051. The total potential housing units that could be accommodated in Whitby's candidate SGAs are approximately 34,900 as noted in Figure 7-7.

Figure 7-6: Town of Whitby Potential Housing Intensification (Supply)

Whitby Housing Intensification Summary: Units (Rounded to nearest '00)										
	Centres	Corridors	(Net Out)	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**%Regional Intens.**
Whitby	15,300	9,800	(100)	4,600	**29,600**	(1,600)	1,100	2,800	**31,900**	**18**

Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-7: Town of Whitby Total Potential Units in Candidate Strategic Growth Areas

Whitby Total Potential Units in Strategic Growth Areas: MTSAs, Centres & Corridors* (Rounded to nearest '00)					
SGA	**Existing**	**Pipeline**	**Soft Sites**	**Net Out**	**Total**
Downtown Whitby Major Central Area	3,200	800	2600	-	6,600
Brock-Taunton Major Central Area	800	500	5,100	-	6,400
Baldwin-Winchester Major Central Area	400	900	1,000	-	2,300
Whitby Waterfront Place	-	1,000	3,200	-	4,200
Whitby MTSA	800	600	6,600	-100	7,900
Baldwin St Segment 3	-	-	-	-	-
Baldwin St Segment 4	-	50	750	-	800
Brock St Segment 2	-	-	1,300	-	1,300
Columbus Rd Segment 1	-	-	-	-	-
Columbus Rd Segment 2	-	-	-	-	-
Dundas St Segment 6	-	-	550	-	550
Dundas St Segment 7	-	300	5,600	-	5,800
Taunton Rd Segment 4	-	-	-	-	-
Taunton Rd Segment 5	-	200	900	-	1,000
Victoria St Segment 5	-	-	-	-	-
Victoria St Segment 6	-	-	-	-	-
Winchester Rd Segment 1	-	-	-	-	-
Winchester Rd Segment 2	-	-	800	-	900
Total**	**5,200**	**4,600**	**25,200**	**-100**	**34,900**

*Table does not include gentle intensification or local development
** Has been adjusted to account for overlapping of candidate SGA's; For the purposes in the Intensification Analysis, the Total row is the correct output for the whole municipality; Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

7.2.4 **City of Oshawa**

The City of Oshawa was determined to have the largest potential for intensification, due to a number of high-capacity candidate SGA Centres and Corridors and two MTSAs. Oshawa has a large contiguous area with intensification potential, incorporating the Central Oshawa MTSA, Downtown Oshawa UGC, Oshawa Downtown Main Central Area and Bloor Street Segment 8 forming the majority of Oshawa's total potential intensification supply. Taunton Road also offers significant intensification potential. Oshawa has a total potential of approximately 47,600 units through intensification, as noted on Figure 7-8, or 27% of regional potential intensification supply to 2051. The total potential housing units that could be accommodated in Oshawa's candidate SGAs are approximately 54,000, see Figure 7-9.

Figure 7-8: City of Oshawa Potential Housing Intensification (Supply)

Oshawa Housing Intensification Summary: Units (Rounded to nearest '00)										
	Centres	Corridors	(Net out)	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**% Regional Intens.**
Oshawa	25,100	14,000	(300)	9,800	**48,600**	(2,800)	1,400	400	**47,600**	**27**

Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-9: City of Oshawa Total Potential Units in Candidate Strategic Growth Areas

Oshawa Total Potential Units in Strategic Growth Areas: MTSAs, Centres & Corridors* (Rounded to nearest '00)					
Candidate SGA	**Existing**	**Pipeline**	**Soft Sites**	**Net Out**	**Total**
Oshawa Downtown Main Central Area	3,300	300	11,200	-	14,800
Windfields Main Central Area**	150	3,350	-	-	3,500
Central Oshawa MTSA	2,200	300	8,200	-	10,800
Thornton's Corners MTSA	-	-	5,300	-	5,300
Oshawa GO MTSA	-	-	-	-	-
Downtown Oshawa Urban Growth Centre	2,000	3,600	3,900	-100	9,400
Oshawa Waterfront Place	-	600	1,000	-	1,600
Bloor St Segment 7	-	-	-	-	-
Bloor St Segment 8	-	-	1900	-100	1800
Bloor St Segment 9	-	-	-	-	-
Harmony Rd Segment 1	-	200	-	-	200
Harmony Rd Segment 2	-	-	-	-	-
Harmony Rd Segment 3	-	-	-	-	-
Harmony Rd Segment 4	-	-	-	-	-
King St Segment 8	-	-	900	-	900
King St Segment 9	-	-	500	-	600
Simcoe St Segment 1	-	100	1,500	-	1,600
Simcoe St Segment 2	-	300	700	-	1,000
Taunton Rd Segment 6	-	-	1,100	-	1,100
Taunton Rd Segment 7	-	800	3,500	-	4,300
Taunton Rd Segment 8	-	-	6,600	-	3,600
Total***	**5,500**	**9,800**	**39,000**	**-300**	**54,000**

*Table does not include gentle intensification or local development
** All potential soft sites in Windfields contained pipeline projects at the time of this study
** Has been adjusted to account for overlapping of candidate SGA's; For the purposes in the Intensification Analysis, the Total row is the correct output for the whole municipality; may not add due to rounding
Source: Urban Strategies Inc., 2021.

7.2.5 **Municipality of Clarington**

Clarington has the potential to grow substantially, but a large portion of this growth cannot be considered as intensification. This is due to the high ratio of DGA land within the Courtice MTSA and along Courtice Road, north of Bloor Street. Nonetheless, Clarington has a total potential supply of more than 19,700 units through intensification, as seen in Figure 7-10, 11% of regional potential intensification supply by 2051. The total potential housing units that could be accommodated in Clarington's candidate SGAs is over 35,400 units, see Figure 7-11.

Figure 7-10: Municipality of Clarington Potential Housing Intensification (Supply)

Clarington Housing Intensification Summary: Units (Rounded to nearest '00)										
	Centres	Corridors	(Net out)	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**% Regional Inten.**
Clarington	25,000	6,300	0	2,500	**33,800**	(14,700)	700	0	**19,700**	**11**

Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-11: Municipality of Clarington Total Potential Units in Candidate Strategic Growth Areas

Clarington Total Potential Units in Strategic Growth Areas: MTSAs, Centres & Corridors* (Rounded to nearest '00)					
Candidate SGA	**Existing**	**Pipeline**	**Soft Sites**	**Net Out**	**Total**
Courtice Urban Area	-	200	600	-	800
Bowmanville West Urban Area	400	1,200	7,600	-	9,200
Bowmanville East Urban Area	700	100	2,400	-	3,200
Newcastle Village Centre	200	100	600	-	800
Courtice MTSA	-	-	13,200	-	13,200
Bowmanville MTSA	400	1,300	8,000	-	9,600
Newcastle Waterfront Place		-	200	-	200
Bowmanville Waterfront Place		-	200	-	200
Bloor St Segment 10	-	200	1,900	-	2,100
Courtice Rd Segment 1	-	-	600	-	600
Courtice Rd Segment 2	-	-	2,200	-	2,200
King St Segment 10	-	500	1,500	-	2,100
King St Segment 11	-	-	100	-	100
King St Segment 12	-	-	-	-	-
Total**	**1,300**	**2,500**	**31,300**	**0**	**35,100**

*Table does not include gentle intensification or local development
** Has been adjusted to account for overlapping of candidate SGA's; For the purposes in the Intensification Analysis, the Total row is the correct output for the whole municipality; Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

7.2.6 **Township of Brock**

Overall, the Township of Brock has limited potential for intensification. Of the three Regional Centers located in Brock, Beaverton Regional Centre offers the highest amount of potential intensification supply. Brock has a total potential supply of approximately 370 units through intensification as shown in Figure 7-12, or 0.2% of regional potential intensification supply by 2051. The total potential housing units that could be accommodated in Brock's Regional Centres is about 590 units, as shown in Figure 7-13.

Figure 7-12: Township of Brock Potential Housing Intensification (Supply)

Brock Housing Intensification Summary: Units (Rounded to nearest '0)										
	Centres	Corridors	(Net out)	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**% Regional Intens.**
Brock	300	-	-	-	300	-	70	-	**370**	**0.2**

Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-13: Township of Brock Total Potential Units in Candidate Strategic Growth Areas

Brock Total Potential Units in Strategic Growth Areas: MTSAs, Centres & Corridors* (Rounded to nearest '0)					
Candidate SGA	**Existing**	**Pipeline**	**Soft Sites**	**Net Out**	**Total**
Beaverton Regional Centre	150	-	120	-	270
Cannington Regional Centre	80	-	80	-	160
Sunderland Regional Centre	70	-	90	-	160
Total**	**300**	**0**	**290**	**0**	**590**

*Table does not include gentle intensification or local development
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

7.2.7 **Township of Uxbridge**

Downtown Uxbridge has the capacity to effectively double its existing stock of units through intensification. Uxbridge has a total capacity of approximately 620 units through intensification, or 0.4% of Regional intensification Supply by 2051. The total potential housing units that could be accommodated in Uxbridge Downtown is just over 1,000 units.

Figure 7-14: Township of Uxbridge Potential Housing Intensification (Supply)

Uxbridge Housing Intensification Summary: Units (Rounded to nearest '0)										
	Centres	Corridors	(Net out)	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**% Regional Intens.**
Uxbridge	520	-	-	-	-	-	100	-	**620**	**0.4%**

Source: Urban Strategies Inc., 2021.

Figure 7-15: Township of Uxbridge Total Potential Units in Candidate Strategic Growth Area

Uxbridge Total Potential Units in Strategic Growth Areas: MTSAs, Centres & Corridors*(Rounded to nearest '0)					
Candidate SGA	**Existing**	**Pipeline**	**Soft Sites**	**Net Out**	**Total**
Uxbridge Downtown	500	-	520	-	1,020
Total**	**500**	**0**	**520**	**0**	**1,020**

*Table does not include gentle intensification or local development
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

7.2.8 **Township of Scugog**

The Township of Scugog has the highest capacity for intensification among the northern municipalities. The Port Perry Main Central Area Regional Centre has strong potential for intensification, with a total capacity of approximately 1,900 units through intensification, or 1% of regional potential intensification supply by 2051. The total potential housing units that could be accommodated in Port Perry Main Central Area is just over 2,100 units.

Figure 7-16: Township of Scugog Potential Housing Intensification (Supply)

Scugog Housing Intensification Summary: Units (Rounded to nearest '0)									
	Centres	Corridors	Pipeline	**Subtotal**	(DGA)	Gentle Infill	Local Dev.	**Total**	**% Regional Intens.**
Scugog	1,800	-	-		(20)	100	-	**1,880**	**1.0**

Source: Urban Strategies Inc., 2021.

Figure 7-17: Township of Scugog Total Potential Units in Candidate Strategic Growth Area

Scugog Total Potential Units in Strategic Growth Areas: MTSAs, Centres & Corridors* (Rounded to nearest '0)					
Candidate SGA	**Existing**	**Pipeline**	**Intensification**	**Net Out**	**Total**
Port Perry Main Central Area	320	0	1,800	0	2,120
Total	**320**	**0**	**1,800**	**0**	**2,120**

*Table does not include gentle intensification or local development
Source: Urban Strategies Inc., 2021.

7.3. MTSA Summary Intensification

This section summarizes the potential for intensification within MTSAs located around 4 existing and 4 planned GO stations. All of the MTSAs, except for the existing Oshawa GO MTSA, have the potential to accommodate a significant level of growth and are appropriate locations for a mix of residential and employment related development. The growth potential of the MTSAs was based upon the following criteria as set out in the Growth Plan: a planned minimum density target of 150 residents and jobs per hectare and development will be supported, where appropriate, by planning for a diverse mix of uses, including additional residential units and affordable housing, to support existing and planned transit service levels.

Sections of certain MTSAs are not within the BUA, and therefore do not count as intensification areas; the Courtice MTSA and Bowmanville MTSAs have large DGA components that are not counted towards intensification. Units located in the MTSA DGA are recorded as soft sites, but are subtracted from the total before the potential intensification summary figures are reported.

Through the Study, a review of the proposed MTSA boundaries and the potential to accommodate intensification and achieve the intensification target was undertaken. All of the Region's proposed MTSAs were determined to have significant growth potential, exceeding the Growth Plan density target of 150 PJH.

The following summaries assume that Employment Lands within MTSA may be converted to mixed use development, including High Density residential uses, Tower development and Mixed-Use Nodal Typologies.

Figure 7-18: Potential Intensification Supply in MTSAs

MTSA Potential Intensification Supply (units) (Rounded to nearest '00)					
	Soft Sites	**Pipeline**	**Net out**	**(DGA)**	**Total**
Pickering	6,300	3,800	(500)	0	9,600
Ajax	5,000	1000	0	0	6,000
Whitby	6,600	600	(100)	0	7,100
Thornton's Corners	5,300	0	0	0	5,300
Central Oshawa	8,200	350	0	0	8,600
Courtice	13,100	0	0	(8,400)	4,800
Bowmanville	8,000	1,300	0	(2,300)	7,000
Total*	**52,500**	**7,100**	**(600)**	**(10,700)**	**48,300**

* Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

The following figure demonstrates how the intensification data is calculated for the MTSAs. The calculation begins with existing residential units (A). The soft sites (C) are added to the pipeline (D) to get the subtotal of intensification. Then the net out (B; units removed through redevelopment) and DGA (F; Designated Greenfield Area units - not intensification) are removed from the subtotal. This figure (G) represents the potential Intensification unit supply within the MTSA. G can be divided by the Region total potential intensification supply figure to provide a percentage of the regional potential intensification supply.

Figure 7-19 SGA Intensification Summary Units Formula

SGA Housing Intensification Study Formula: Units								
	Existing	**(Net Out)***	**Soft Sites**	**Pipeline**	**subtotal**	**(DGA)**	**Intensification**	**% Total Intensification**
SGA	A	B	C	D	A-B+C+D =E	F	(C+D)-(B+F) = G	G/Region Total = H

*Net out refers to units that are replaced through redevelopment
Source: Urban Strategies Inc., 2021.

7.3.1 **Pickering MTSA**

The proposed Pickering MTSA[45] is centred around the GO Station adjacent to Highway 401 at Liverpool Road. The MTSA is roughly bounded by St. Martins Drive at the southwest, Bayly Street to the south, Sandy Beach Road and Valley Farm Road to the east, and Kingston Road to the north. The Pickering MTSA overlaps significantly with the Pickering City Centre Urban Growth Centre. The MTSA generally incorporates the commercial area of Pickering Town Centre. The Pickering MTSA is 79 ha, and has a projected density of 422 people and jobs per hectare (PJH). The Pickering MTSA has a high number of jobs due to major offices and the existing Pickering Town Centre, resulting in a relatively evenly balanced ratio of people to jobs.

Figure 7-20: Pickering MTSA Intensification Summary Units

Pickering MTSA Housing Intensification Study Summary: Units (Rounded to nearest '00)								
	Existing	**(Net Out)**	**Soft Sites**	**Pipeline**	**Subtotal**	**(DGA)**	**Intensification***	**% Total Intensification**
MTSA**	1,100	(500)	6,300	3,800	10,700	0	**9,600**	**6%**

* Intensification excludes Existing units
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-21: Pickering MTSA Potential Density Summary

Pickering MTSA Summary Potential Density		
	People	**Jobs**
Existing	1,972	6,000
Pipeline	6,832	594
Net out	-855	-
Soft Sites	11,217	7,568
Subtotal	19,165	14,161
Total		33,327
Area (hectares)		79
Density (PJH)*		**422**

Source: Urban Strategies Inc., 2021.
*totals rounded to nearest 10

[45] See Report #2020-P-7 – Major Transit Station Areas – Proposed Policy Directions, File: D12-01

Figure 7-22: Pickering MTSA and Intensification Typologies Applied

Source: Urban Strategies Inc., 2021.

7.3.2 **Ajax MTSA**

The proposed Ajax MTSA is bounded by Duffins Creek/Annandale Golf Course to the west, Highway 401 to the North, rail infrastructure east of Westney Road, and extends just past Bayly Street West to the south. The MTSA is predominantly assigned the Nodal Mixed-Use typology, with a number of sites identified for Towers and High-Density development. The Ajax MTSA has an area of 45 ha and a projected density of 374 PJH. The number of units and jobs is relatively evenly balanced, with the resulting number of people being slightly higher than jobs.

Figure 7-23: Ajax MTSA Intensification Summary Units

Ajax MTSA Housing Intensification Study Summary: Units (Rounded to nearest '00)								
	Existing	**(Net Out)**	**Soft Sites**	**Pipeline**	**Subtotal**	**(DGA)**	**Intensification***	**% Total Intensification**
MTSA**	0	0	5,000	1,000	6,000	0	**6,000**	**3%**

* Intensification excludes Existing units
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-24: Ajax MTSA Potential Density Summary

Ajax MTSA Summary Potential Density		
	People	**Jobs**
Existing	-	1,700
Pipeline	1,720	119
Net out	-	-
Soft Sites	8,618	4,739
Subtotal	10,338	6,558
Total		16,896
Area (hectares)		45
Density (PJH)		**374**

Source: Urban Strategies Inc., 2021.

Figure 7-25: Ajax MTSA and Intensification Typologies Applied

Source: Urban Strategies Inc., 2021.

7.3.3 **Whitby MTSA**

The proposed Whitby MTSA is bounded by Montecorte Street to the west, Highway 401 to the north, the environmental protection and natural heritage features to the east, and Port Whitby and Watson Street to the south. The MTSA has been assigned a mix of Mid-rise and Nodal Mixed-Use typology, with a number of sites identified for Towers and High-Density development. The Whitby MTSA has an area of 107 ha and a projected density of 188 PJH. The Whitby MTSA has a higher portion of people to jobs to align with the planned intention detailed in the Port Whitby Secondary Plan and Official Plan Schedule F.

Figure 7-26: Whitby MTSA Intensification Summary Units

Whitby MTSA Housing Intensification Study Summary: Units (Rounded to nearest '00)								
	Existing	**(Net Out)**	**Soft Sites**	**Pipeline**	**Subtotal**	**(DGA)**	**Intensification***	**% Total Intensification**
MTSA**	800	(100)	6,600	600	7,900	0	**7,100**	**4%**

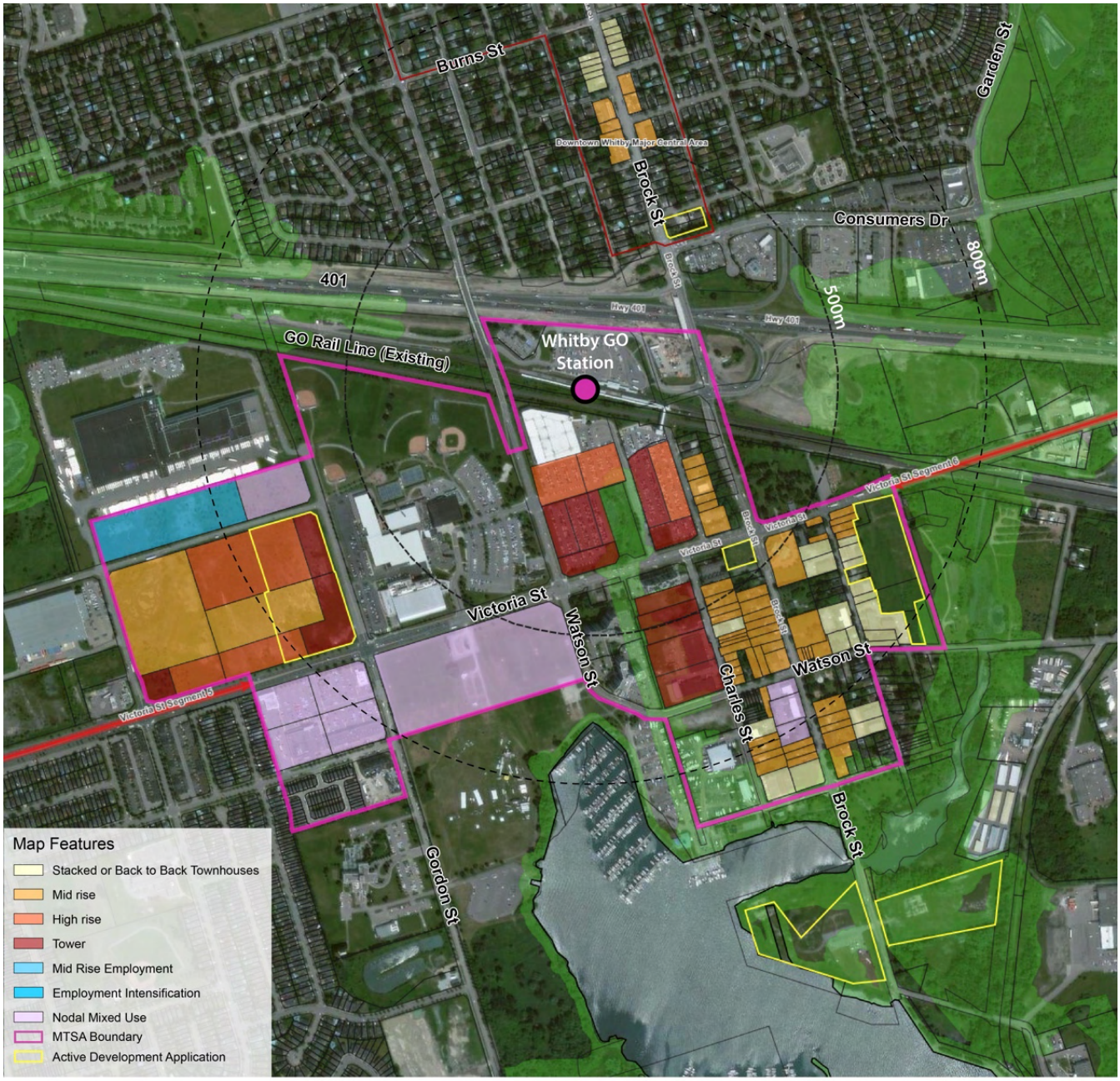
* Intensification excludes Existing units
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-27: Whibty MTSA Potential Summary Density

Whitby MTSA Summary Potential Density		
	People	**Jobs**
Existing	1,389	269
Pipeline	961	571
Net out	-146	-
Soft Sites	10,605	6,515
Subtotal	12,809	7,355
Total		20,164
Area (hectares)		107
Density (PJH)		**188**

Source: Urban Strategies Inc., 2021.

Figure 7-28: Whitby MTSA and Intensification Typologies Applied

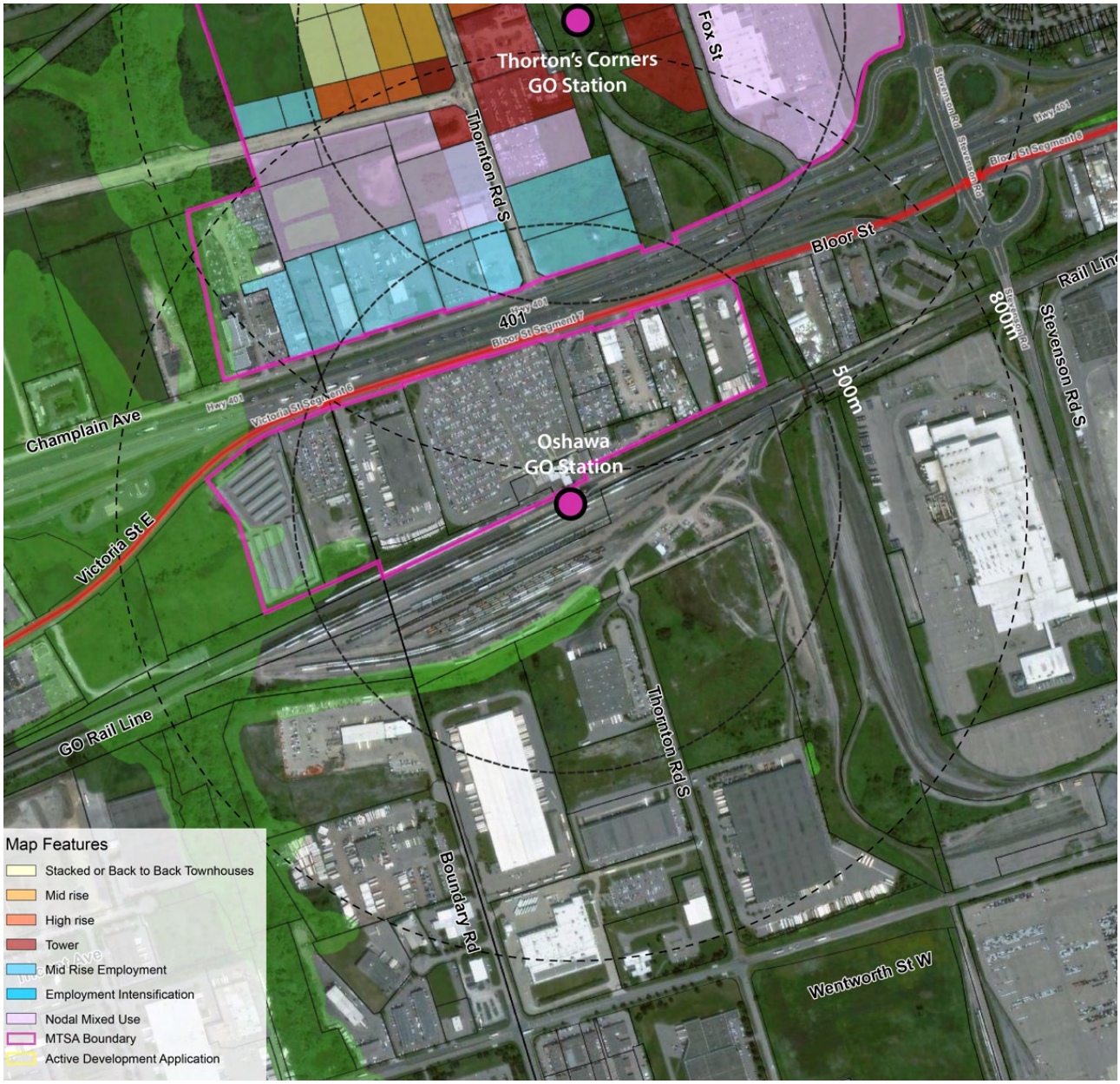


Source: Urban Strategies Inc., 2021.

7.3.4 **Oshawa GO MTSA**

The Oshawa MTSA is bounded by Highway 401 to the north, the rail corridor to the east and south, as well as the environmental protection and natural heritage features to the west. No soft sites were identified within the existing Oshawa GO MTSA, and thus no figures for intensification are available.

Figure 7-29: Oshawa GO MTSA and Intensification Typologies Applied



Source: Urban Strategies Inc., 2021.

7.3.5 **Thornton's Corners MTSA**

The proposed Thornton's Corners MTSA is bounded by the existing rail spur to the west, the rail corridor to the north, Bristol Crescent and Dorchester Drive to the east, and Highway 401 to the south. The MTSA is assigned a mix of Nodal Mixed-Use, Tower High-rise and Employment Intensification typologies. The Thornton's Corners MTSA has an area of 70 ha and a projected density of 217 PJH.

Figure 7-30: Thornton's Corners MTSA Intensification Summary Units

Thornton's Corners MTSA Housing Intensification Study Summary: Units (Rounded to nearest '00)								
	Existing	**(Net Out)**	**Soft Sites**	**Pipeline**	**Subtotal**	**(DGA)**	**Intensification***	**% Total Intensification**
MTSA**	0	0	5,300	0	5,300	0	**5,300**	**3%**

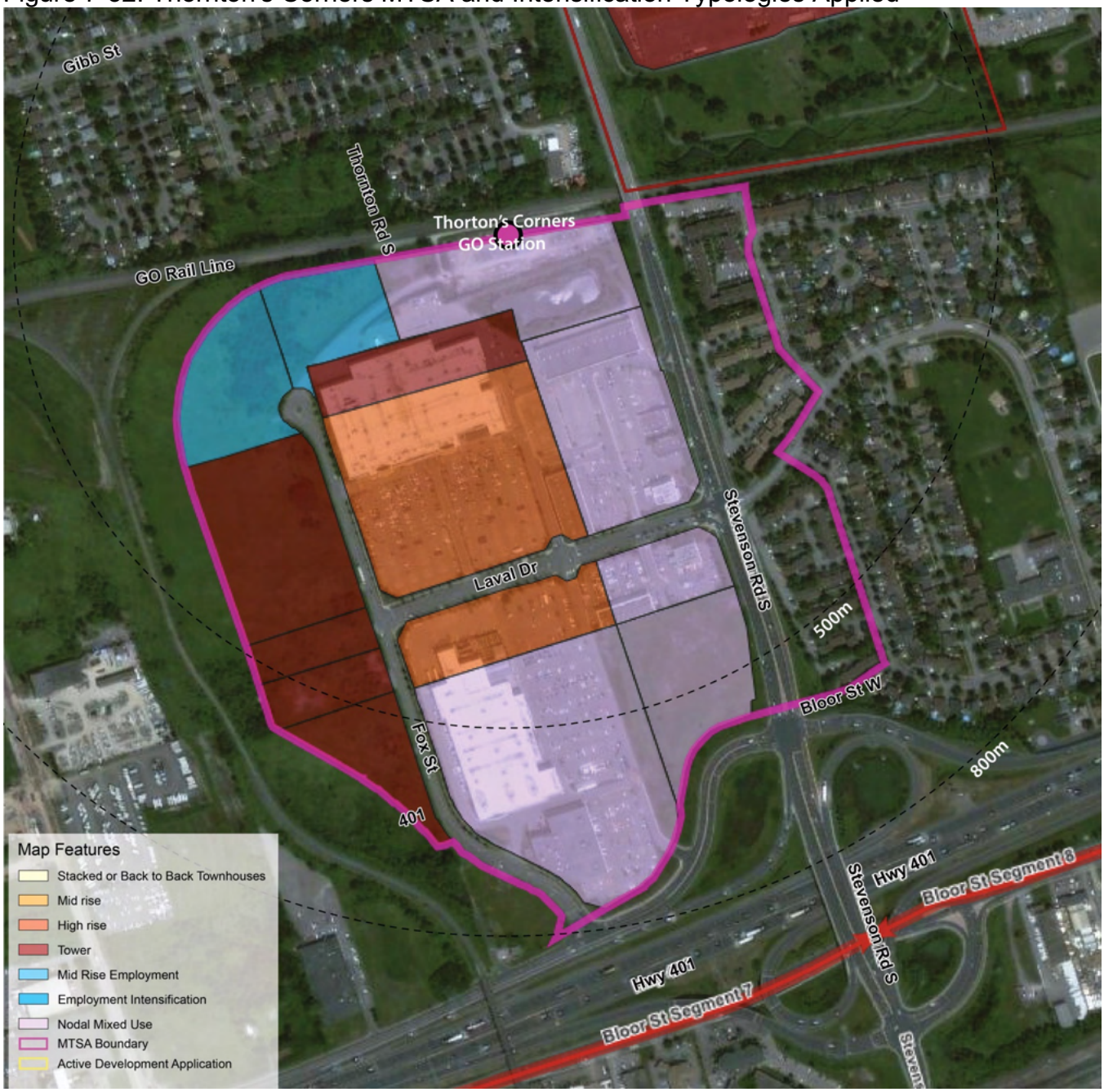
* Intensification excludes Existing units
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-31: Thorntons Corners MTSA Potential Summary Density

Thornton's Corners MTSA Summary Potential Density		
	People	**Jobs**
Existing	-	210
Pipeline	-	-
Net out	-	-
Soft Sites	9,192	6,003
Subtotal	9,192	6,003
Total		15,195
Area (hectares)		70
Density (PJH)		**217**

Source: Urban Strategies Inc., 2021.

Figure 7-32: Thornton's Corners MTSA and Intensification Typologies Applied



Source: Urban Strategies Inc., 2021.

7.3.6 **Central Oshawa MTSA**

The Central Oshawa MTSA is generally bounded by Centre Street South to the west, John Street to the north, Ritson Road South and accompanying sites along Dean Ave to the east, and Highway 401 to the south. The MTSA is assigned a mix of Tower and High-rise typologies, with a number of sites identified for Mid-rise and Townhouse development. The Central Oshawa MTSA has an area of 146 ha and a projected density of 161 PJH. The results indicate a higher share of units than jobs and thus the ratio of people is much higher than jobs within the Central Oshawa MTSA.

Figure 7-33: Central Oshawa MTSA Intensification Summary Units

Central Oshawa MTSA Housing Intensification Study Summary: Units (Rounded to nearest '00)								
	Existing	**(Net Out)**	**Soft Sites**	**Pipeline**	**Subtotal**	**(DGA)**	**Intensification***	**% Total Intensification**
MTSA**	2,200	0	8,200	350	10,800	0	**8,600**	**5%**

* Intensification excludes Existing units
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-34: Central Oshawa MTSA Potential Summary Density

Central Oshawa MTSA Summary Potential Density		
	People	**Jobs**
Existing	4,630	587
Pipeline	604	-
Net out	-	-
Soft Sites	14,865	2,797
Subtotal	20,098	3,384
Total		23,482
Area (hectares)		146
Density (PJH)		**161**

Source: Urban Strategies Inc., 2021.

Figure 7-35: Central Oshawa MTSA and Intensification Typologies Applied

Source: Urban Strategies Inc., 2021.

7.3.7 **Courtice MTSA**

The Courtice MTSA is bounded by Trulls Road to the west, properties near Bloor Street to the north, environmental protection and natural heritage features parallel with Courtice Road to the east, and Highway 401 to the south. The MTSA is mostly assigned the Nodal Mixed-Use typology, with several sites identified for Tower and High-rise development. The Courtice MTSA has an area of close to 160 ha and a projected density of 273 PJH. The Courtice MTSA has a higher ratio of jobs due to large amount of Nodal Mixed-Use sites. Courtice also has a high ratio of DGA development. It is also noted that the lands east of Courtice Road are outside the Urban Area boundary and are subject to a Settlement Area Boundary Expansion request.

Figure 7-36: Courtice MTSA Intensification Summary Units

Courtice MTSA Housing Intensification Study Summary: Units (Rounded to nearest ’00)								
	Existing	**(Net Out)**	**Soft Sites**	**Pipeline**	**Subtotal**	**(DGA)**	**Intensification***	**% Total Intensification**
MTSA**	0	0	13,100	0	13,200	(8,400)	**4,700**	**3%**

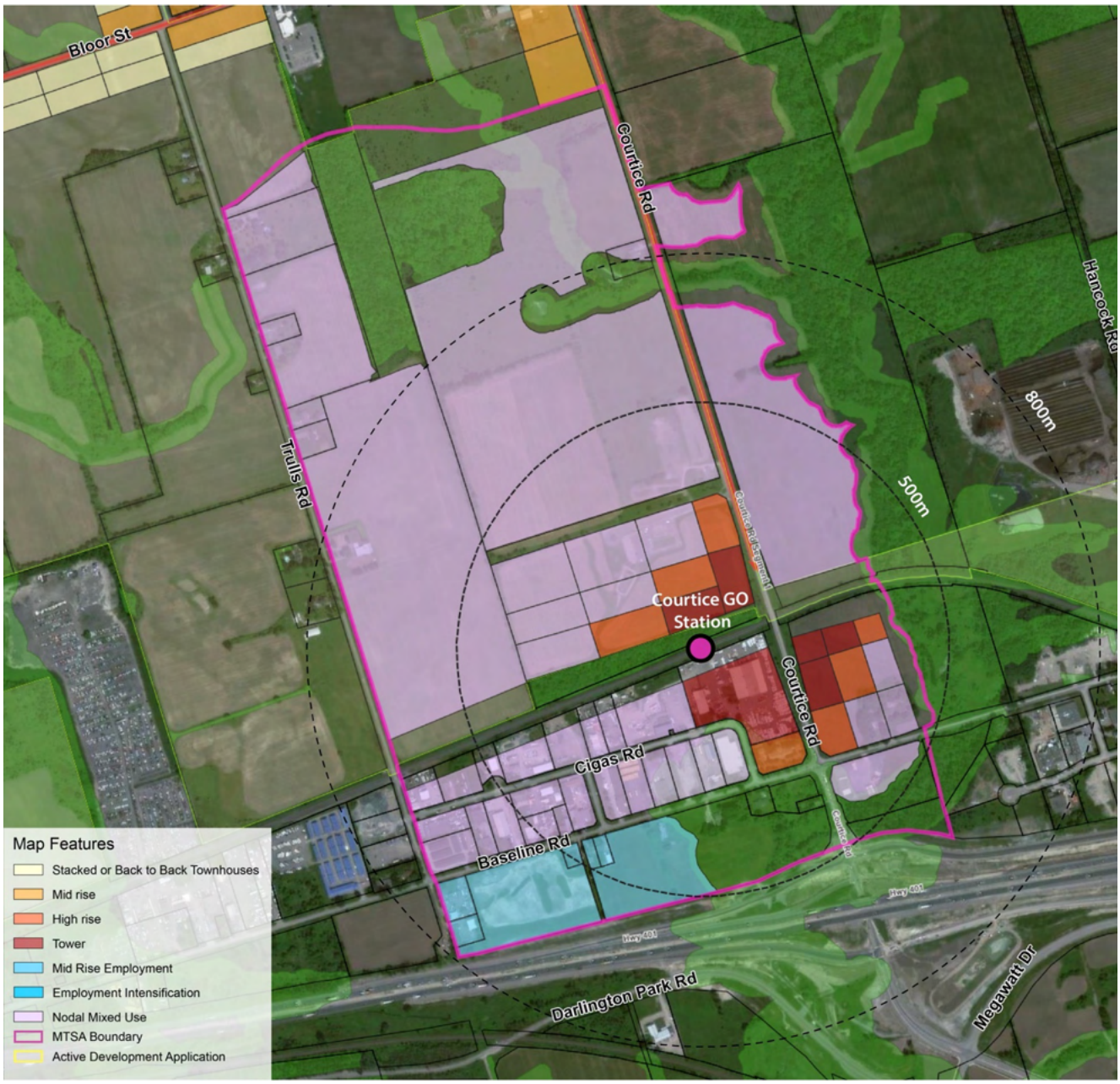
* Intensification excludes Existing and DGA units
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-37: Courtice MTSA Potential Summary Density

Courtice MTSA Summary Potential Density		
	People	**Jobs**
Existing	56	311
Pipeline	-	-
Net out	-	-
Soft Sites	19,309	24,081
Subtotal	19,365	24,392
Total		43,757
Area (hectares)		160
Density (PJH)		**273**

Source: Urban Strategies Inc., 2021.

Figure 7-38: Courtice MTSA and Intensification Typologies Applied[46]



Source: Urban Strategies Inc., 2021.

[46] The MTSA analysis included all soft sites within the proposed Major Transit Site Area. The MTSA analysis assumes full build out. Portions of this area are outside the current urban settlement areas and would only be considered part of the MTSA pending determination of The MCR and Regional Council approval through that process.

7.3.8 **Bowmanville MTSA**

The Bowmanville MTSA is generally bounded by Boswell Drive to the west, Brookhill Blvd. / environmental protection and natural heritage features to the north, the rail corridor to the east, and Aspen Springs Drive and adjacent properties to the south. This MTSA has been assigned a mix of the Nodal Mixed-Use and Tower typologies, with several sites identified for High-rise, Mid-rise and Townhouse development. The Bowmanville MTSA has an area of 127 ha and a projected density of 179 PJH. The Bowmanville MTSA has a higher ratio of people to jobs due to the number of high-density residential soft sites.

Figure 7-39: Bowmanville MTSA Intensification Summary Units

Bowmanville MTSA Housing Intensification Study Summary: Units (Rounded to nearest ’00)								
	Existing	**(Net Out)**	**Soft Sites**	**Pipeline**	**Subtotal**	**(DGA)**	**Intensification***	**% Total Intensification**
MTSA**	400	0	8,000	1,300	9,600	(2,300)	**7,000**	**4%**

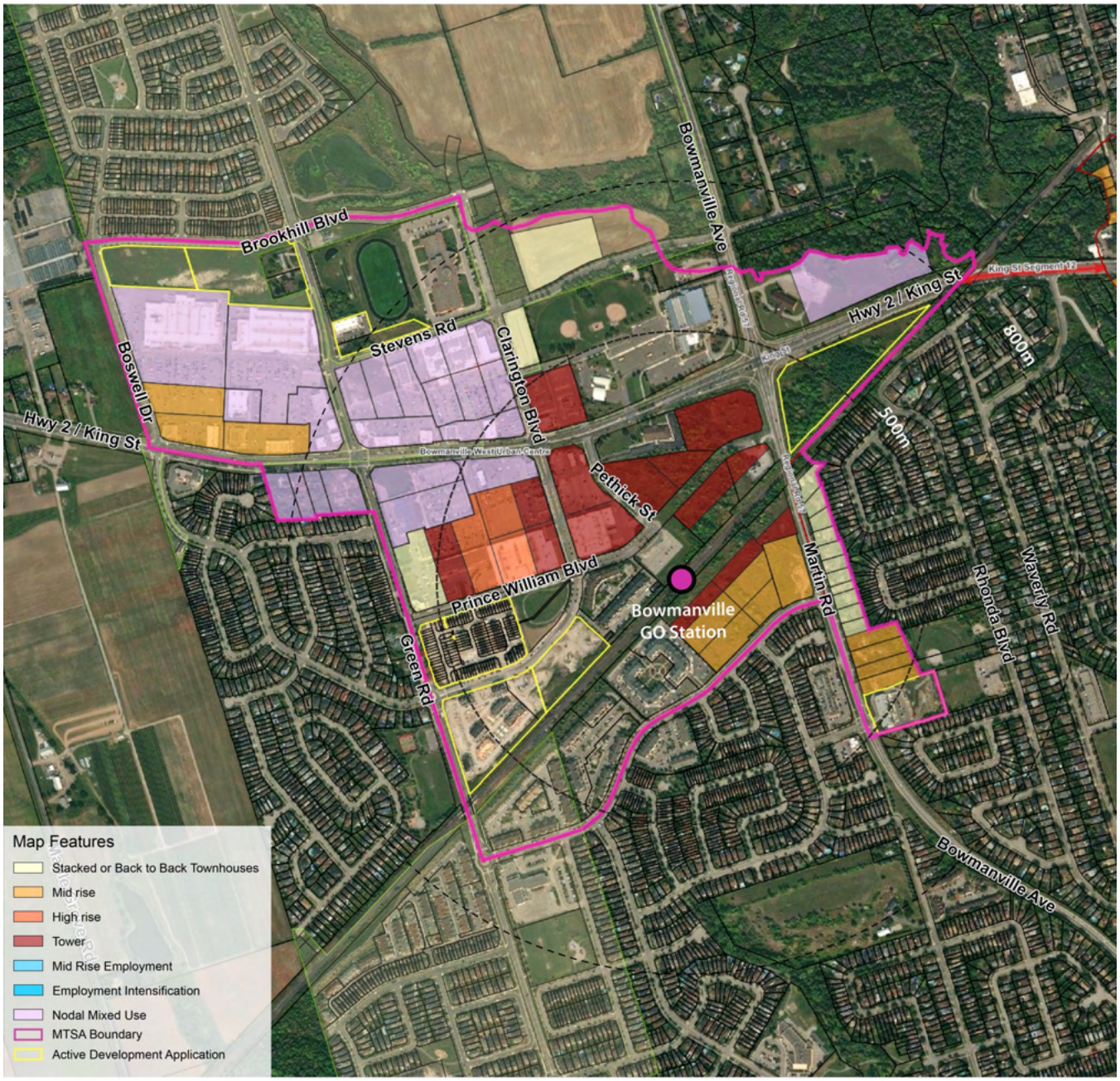
* Intensification excludes Existing or DGA units
** Figures taken from Intensification Analysis Model and rounded within table, may not add due to rounding
Source: Urban Strategies Inc., 2021.

Figure 7-40: Bowmanville MTSA Potential Summary Density

Bowmanville MTSA Summary Potential Density		
	People	**Jobs**
Existing	724	1,854
Pipeline	1,891	-
Net out	-	-117
Soft Sites	12,135	6,220
Subtotal	14,750	7,957
Total		22,707
Area (hectares)		127
Density (PJH)		**179**

Source: Urban Strategies Inc., 2021.

Figure 7-41: Bowmanville MTSA and Intensification Typologies Applied



Source: Urban Strategies Inc., 2021.

8. Recommendations

8.1. Building on Earlier Recommendations

This chapter summarizes the recommendations related to intensification identified in the BUA and specifically within canadidate SGAs across the Region of Durham. The Housing Intensification Study builds from the work undertaken to date for *Envision Durham*, including the Region's MTSA study and background phases of the GMS. The analysis and recommendations to date from the Regions' *Proposed Policy Directions Report*, *MTSA Proposed Policy Directions Report* and *Opportunities and Challenges Report* have provided a basis for the intensification methodology, findings and further recommendations. For this reason, a brief summary of the recommendations of Durham Region staff reports that inform the Intensification study are provided below. A more detailed summary of the recommendations the *Opportunities and Challenges Report* is also provided.

Durham Region's *Proposed Policy Directions Report*, dated March 2021, contains proposed land use policy directions to be included in the Regional Official Plan through Envision Durham, and aims to support the Region through its anticipated growth to 2051. This includes classifying certain component of the Regional Structure as SGAs, directions for focusing intensification within SGAs, and improving mobility and housing options. Policies for shaping and guiding intensification are described with reference to related land use planning objectives. The Housing Intensification Study is designed to reinforce these policy directions and outcomes and offers recommendations on refining the approach to intensification within the SGAs.

Durham Region's *Major Transit Station Areas – Proposed Policy Directions Report*, dated December 1st, 2020, contains recommendations on viability, growth and intensification within the delineated MTSAs. Recommendations in this report support the ongoing planning and future success of the 4 existing and 4 planned GO stations. The Housing Intensification Study has built from this work and provides further analysis on the intensification potential of the MTSAs and offers recommendations on land use and boundary delineation on this basis.

8.2. Overview of Recommendations from Growth – Opportunities and Challenges Report

As part of the Durham GMS project, the *Opportunities and Challenges Report* (December 2020) set the context for the broader LNA analysis summarizing the broader context for growth and identified key opportunities and challenges related to accommodating growth in Durham Region by 2051. The *Opportunities and Challenges Report* included a number of broad recommendations that position Durham to enable and manage future growth. Recommendations from the *Report* that inform the Housing Intensification Study include:

- Through the Housing Intensification Study, prioritize growth in MTSAs and other SGAs which leverage public transit investments that provide connectivity and access to growing employment markets.

- Support the Region's growing economy by encouraging population and employment growth to areas that promote a range of housing types and tenures, enhanced mobility, walkability and vibrant mixed-use environments and amenity rich Employment Areas. In particular, through the Housing Intensification Study and Employment Strategy, the analysis has assumed that growth in Employment Areas and SGAs which include UGCs and MTSAs would include higher densities and a balance of residents and jobs through mixed use development.

- The Growth Plan population and employment forecasts for Durham Region are aspirational and will require a significant increase in the regional growth rate if they are to be achieved. It is recommended that the 2051 forecast contained in the Growth Plan be the basis for the Durham GMS and LNA. A higher long-term population and employment growth alternative is not recommended. This forecast has been the basis for the Housing Intensification Study and Employment Strategy.

- The accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. As an outcome of the GMS, a housing forecast by type and location has been provided, which considers the need to attract and accommodate new skilled working residents to the region through a broad range of housing options by type, location, tenure and affordability.

- Through the Durham GMS and Envision Durham, prioritize growth and further infrastructure investment within SGAs and other priority intensification areas that align with current and planned servicing, transit, and transportation networks. While the GMS findings related to intensification potential have been reviewed with the Durham Works department, the alignment of infrastructure planning and land use planning will be key to accommodating the Forecast 2051 levels of growth.

- Through the Durham GMS and Envision Durham, consider appropriate policies that prioritize and promote office and mixed-use development within SGAs, including MTSAs and UGCs, as well in other appropriate areas in the region. This includes ensuring that planning policies and regulations are supportive of intensification initiatives and the economic objectives of the Region. This recommendation was implemented through the GMS by assigning a higher share of Major Office and Employment Intensification typology within the UGC and MTSAs.

- Through the Housing Intensification Study, reflect the continued need to accommodate and plan for older generations while also attracting younger adults and new generations by increasing the market choice of housing available within Durham Region by housing

structure type. This has been addressed in the GMS in the shifts from historical and recent date for Durham Region to the regional housing unit mix in the Forecast to 2051.

- Through the Durham GMS and Envision Durham, consider policies, programs and initiatives that support a broad range of new housing options for all ages and income groups. This should include rental apartments, condominiums and entry-level townhome products (e.g., back-to-back townhomes and stacked-townhomes and apartments) for younger adults as well as a range of housing products, including seniors' housing, to accommodate older adults. This has been addressed in the recommendations in the Growth Forecast and Housing Intensification Technical Reports.

The above recommendations speak to the strategic alignment of infrastructure, transit, housing options and choices, walkability and mix of uses within the BUA and in particular SGAs. The Housing Intensification Study builds upon these recommendations by confirming a shift toward higher density housing forms, demonstrating the high levels of growth potential within Urban Growth Centres, Regional Centres, MTSAs, and certain Regional Corridors, confirming Durham Region's ability to accommodate the minimum 50% intensification rates, assessing both residential and employment land use potential and ensuring the alignment by housing mix between the potential intensification supply and housing demand to 2051.

8.3. Policy Directions Report

The *Proposed Policy Directions Report* speaks to intensification as an objective with diverse benefits, including the efficient use of existing services and amenities, improved ecological health, economic development, complete communities, and reduced need for greenfield development. Policies are included that promote intensification to secure these benefits. *The Proposed Policy Directions Report* stated that an appropriate minimum intensification target for the BUA would be determined through detailed analysis undertaken as part of the *Growth Management Study* and the related technical studies.

Recognizing the ecological benefits of intensification, the *Policy Directions Report* recommends the augmentation of policy language to increase the rate of intensification to, at a minimum, achieve the requirements of the Growth Plan, and thereby reduce the potential need and rate of greenfield development. It also recommends policy language be included in the ROP to explicitly reference improved air quality as an objective for the ROP by promoting intensification and compact build form.

Related to Urban System, the *Policy Directions Report* calls for new goals that manage urban growth and advance the development of SGAs. More specifically, to manage urban growth by promoting intensification and development that optimizes infrastructure and public service facilities, implementing practices that support sustainability, climate change mitigation and adaptation, while protecting the components of the Greenlands System.

In terms of SGAs, the Report directions seek to advance the development of SGAs as focal points for intensification, economic activity, significant employment intensification and employment generating uses, culture, and entertainment, characterized by people-oriented urban built form and transit-oriented development.

To do so, proposed directions related to SGAs include:

- Designate and delineate Urban Growth Centres and MTSAs as Strategic Growth Areas within the ROP;
- Designate and delinate Regional Centres in south Durham as SGAs within the ROP;
- Prioritize the provision of municipal infrastructure and servicing to SGAs
- review and refine Centres and Corridors against density targets within the ROP;
- Designate the Highway 2 and Simcoe Street corridor as a Rapid Transit Spine Corridor and consider appropriate density targets and corridor delineation;
- Remove Regional Corridor overlays for areas that do not have the ability to achieve the intended function outlined in the ROP, using a set of defined criteria;
- Review ROP policies to provide greater clarity on geographic application of density targets and delineation of intensification areas/SGAs;
- Require area municipalities to amend their official plans and zoning by-laws to delineate SGAs and update policies to ensure the minimum density targets contained in the ROP will be achieved; and
- Designate and delineate the Regional Centres in north Durham (Brock, Scugog and Uxbridge) as Rural Regional Centres, however, given their more modest growth potential, they are not proposed to be designated as Strategic Growth Areas.
- Waterfront Places, given their more modest growth potential, are not proposed to be designated SGAs.

The analysis provided in this report confirms that the greatest potential for future growth, specifically through intensification within the BUA, is focused in MTSAs, UGCs, Regional Centres, and certain Regional Corridors, warranting the designation of these areas as Strategic Growth Areas at the Regional Scale. Long term growth and intensificaiton potential is more limited in the Regional Centres in north Durham and in Waterfront Places. There are also a number of Corridors that offer little or no growth potential.

8.4. Major Transit Station Areas – Directions Report

MTSAs represent significant opportunities to create compact development and direct intensification and growth in a manner that maximizes the benefits of being within proximity to higher-order transit. These are places where the transit stations are a focal point for high-density mixed-use development.

The report seeks to establish a vision for the MTSAs based on the principles of transit-oriented development (TOD). This vision describes MTSAs as being integrated with mixed-use development offering convenient, direct access from high-density development sites to station amenities and access points. Generally, the highest densities within MTSAs are intended to be concentrated on the station property and in close proximity to GO stations to integrate the stations with transit-oriented development. Densities will transition to lower density areas in a manner appropriate to the context of each site.

The Housing Intensification Study aligns with the vision and policies put forth in the *Major Transit Station Areas – Directions Report* by orienting highest densities and mixed uses closest to the GO Stations, transitioning built form assumptions to the surrounding communities in a contextually appropriate manner and assessing the potential to accommodate Growth Plan density targets for MTSAs within the delineated draft boundaries. The analysis provided in this report confirms that Durham's MTSAs, aside from the existing Oshawa station, have sufficient long term growth potential to achieve the Growth Plan target of 150 people and jobs per hectare.

8.5. Housing Intensification Study Policy Recommendations

The following recommendations stem from the Housing Intensification Study and findings.

1. **Recommendation:** A minimum region-wide intensification target of 50% be established.

Explanation: This Study has identified a long term potential supply of approximately 177,700 housing units across the BUA in Durham. A minimum of 106,700 units between 2022 to 2051 will be required by intensification to meet this target. The rate of growth is forecasted to accelerate between 2022 and 2051, and the Region will need to accommodate approximately 3,700 units through intensification every year to achieve this target. This target compares to an intensification rate of 1,640/year between 2006 and 2022. While potential supply exists to absorb a higher intensification rate, demographic and market forces are unlikely to drive demand for the percentage of units within the BUA higher than 50%. Further, the 50% intensification target is a minimum and does not impede greater levels of intensification should the demand exist, in particular for higher density forms of development.

2. **Recommendation:** Align regional infrastructure planning to accommodate longer term growth within the BUA that could exceed the minimum 50% intensification rate, taking in consideration the longer term land use and intensification potential identified through the GMS.

Explanation: While the minimum intensification target responds to 2051 population forecast, the GMS analysis indicates that intensification within the BUA will continue to occur beyond this timeframe. Infrastructure planning considers a longer term framework for investment in both hard and soft infrastructure to support growth. It will be important to align infrastructure

investment to meet the 2051 intensification targets and beyond, potentially to accommodate a 40-50 year horizon or full build out anticipated through the soft site analysis.

3. **Recommendation:** Advance policies within the ROP that support a shift towards higher-density housing forms in the BUA, which may include a housing mix target, investment in public realm, mobility and community amenities to support higher density, urban living.

Explanation: Achieving the 50% intensification target will require a significant increase in the rate of residential development within the BUA (over double annual unit construction), and a shift towards higher-density forms within the unit mix in Durham Region. The shift towards high-density housing types will require policies that enable and encourage these changing trends and align infrastructure investment priorities to support this growth. In particular, the Region and Area Municipalities should consider introducing policies and targets related to housing unit mix; multi-unit, and higher density forms of development in SGAs. Another mechanism may be to concurrently update policies and implementing zoning by-laws in MTSAs, UGCs and SGAs that facilitate the introduction of density and incentivize development at a scale to accommodate growth in the BUA.

Improvements to the public realm, planning for transportation choice and increasing community amenities to support higher density neighbourhoods should also be considered. Accommodating density will also require a shift in the approach to accommodating growth within transportation infrastructure. Policies should support a shift in the mobility priority away from the vehicle-carrying capacity (road and intersection expansion) towards the person-carrying capacity (dedicated BRT lanes, signal priority for transit) of the infrastructure network. The Region and the Area Municipalities must work proactively to influence travel behaviours and mode choice as the existing road network will not be able to accommodate the forecast intensification while maintaining current approaches to level of service.

4. **Recommendation:** Refine policies that support investment to enable growth. More specifically, recognize the important role MTSAs, UGCs, Regional Centres and key segments of the Regional Corridors as Strategic Growth Areas that will be key to accommodating growth, achieving the intensification targets in Durham and encouraging compact built form. Refine policies to inform investment decisions to enable growth and development in these areas.

Explanation: The MTSAs have the capacity to absorb 48,300 units by intensification, which is 45% of the required number of units by intensification by 2051 to achieve the 50% target. This represents an opportunity to absorb growth in a form that support the Region's objectives of TOD in the MTSA Directions Report.

The capacity for growth and intensification among Regional Centres and Corridors is not even. Certain Centres and Corridors have the capacity to play a more significant role in accommodating growth and intensification, as demonstrated in Chapter 7. In accordance with the Growth Plan, prioritize the achievement of intensification and higher densities within

SGAs.Through the Region's Development Charge forecast and infrastructure financing approach, infrastructure projects and investment should be identified that can unlock or remove barriers to achieve the growth potential in SGAs.

5. **Recommendation:** Develop policies that promote integration of high density mixed-uses and encourage first- and last-mile connectivity within the existing and planned MTSAs.

Explanation: Planning for the integration of land use and transit infrastructure enables the opportunity to accommodate growth at higher densities, creating walkable communities while leveraging investment in higher order transit. MTSAs are an opportunity to develop transit-oriented communities through anticipated growth. Key to their success is their relationship to the transit service and active transportation networks that defines their position. Direct and rational connections to and within the MTSAs will enhance their viability and distinguish their offering in the marketplace.

6. **Recommendation:** For the purposes of planning for growth, Durham Region is encouraged to designate Regional Centres as SGAs where they have the potential to accommodate significant levels of long term growth and intensificiation. In terms of Regional Corridors, the regional planning structure should focus on identifying segments that have the greatest potential to accommodate growth, connect communities and increase mobility choice within the Region as SGAs. A classification or hierarchy of Corridors by intensification potential may be explored.

Explanation: In the existing ROP, the Urban Structure identifies 2 Urban Growth Centres, 16 Regional Centres and 13 Regional Corridors. The analysis provided in this report demonstrates that UGCs and Regional Centres in south Durham have significant capacity to accommodate intensification, meeting the definition of an SGA. Intensification potential in the 5 Regional Centres in north Durham, while locally significant, is more modest when considered at the Regional scale.Not all Regional Corridors provide the same level of opportunity for accommodating growth or connecting places. Focusing on the Corridors with the greatest growth potential, connectivity and degree of planned transit infrastructure allows for a refined policy approach that can target the growth challenges and opportunities for each specific Corridor. Further analysis as part of the GMS will be assessing the role of Regional Corridors, determining a classification of Corridors by growth potential, and establishing appropriate planned densities for these Corridors. Further, the analysis will make recommendations on corridors, or segments thereof which may no longer be designated as Regional Corridors.

7. **Recommendation:** Waterfront Places do not warrant designation as Strategic Growth Areas in the ROP.

Explanation: In the current Regional Official Plan, there are five designated Waterfront Places: Pickering, Whitby, Oshawa, Darlington/Bowmanville, and Newcastle. Through this analysis the growth capacity of each Waterfront Places has been evaluated. Only the Whitby Waterfront Places has notable development potential, which is mainly due to its significant

overlap with the Whitby MTSA. The intensification potential in the Whitby Waterfront Place that is outside of the MTSA are two planned pipeline projects. Generally, all five Waterfront Places are constrained from significant intensification potential due to existing/adjacent employment lands, natural heritage features, existing residential development, or a combination of all three.

The current ROP designation recognizes the unique function of Waterfront Places as focal points along the waterfront but allows for a detailed planning and implementation by the respective area municipality. Based on this study, the limited and varied development potential within Waterfront Places indicates that the current designation remains appropriate and that Waterfront should not be designated and elevated as SGAs.

9. Conclusions and Next Steps

The Region of Durham has significant potential to accommodate and attract growth within the BUA, and in particular within SGAs, to 2051 and beyond. However, achieving a minimum 50% intensification rate will require supportive policies at the Regional and area municipal level and alignment of infrastructure investment to unlock this potential. The significant shift in housing type and mix over the next 30 years will transform the urban landscape and will be key to providing the range of housing options to ensure Durham's competitive position in the broader GGH region.

This Study has confirmed the ability to accomodate the minimum 50% intensification target prescribed for the Region by the Growth Plan. Both the Housing Forecast, including housing mix, and the recommended 50% intensification target will be key inputs into the LNA.

Following the outcomes of the Employment Land Conversion Analysis, the Regional potential residential intensification supply will be refined and all adjustments will be outlined within the LNA Summary Report.

10. APPENDICES

10.1 Appendix A: Strategic Growth Area Baseline Data

10.2 Appendix B: Applying Methodology to a Centre and Corridor

10.3 Appendix C: Housing Intensification Study Data Package

10.4 Appendix D: SGA Potential Densities and Minimum Densities

10.1. Appendix A: Candidate Strategic Growth Areas Baseline Data

The existing developable land area and people and jobs for Regional Centres are summarized below and classified by the following policy designations:

Downtown
VC: Village Centre
RC: Regional Centre
UA: Urban Area
MnCA: Main Central Area
MrCA: Major Central Area
MTSA: Major Transit Station Area
UGC Urban Growth Centre
WP: Waterfront Place

Figure A-A-1: Candidate Strategic Growth Areas Baseline Data

Existing (June 2020 - Census Adjusted Estimate)					
	Land Area	**Residential Units**	**Population**	**Estimated Average PPU**	**Jobs**
	hectare				
Ajax Uptown RC	106.46	445	1,211	2.72	3,549
Ajax Downtown RC	144.60	2,386	5,298	2.22	4,513
Ajax MTSA	**45.20**	**-**	**-**	**-**	**1,700**
Beaverton RC	17.28	148	261	1.76	303
Cannington RC	7.65	80	132	1.65	213
Sunderland RC	11.49	73	141	1.93	112
Courtice UA	19.76	16	32	2.00	41
Bowmanville West UA	121.46	360	750	2.08	1,736
Bowmanville East UA	59.92	719	1,256	1.75	3,426
Newcastle VC	18.52	168	284	1.69	417
Courtice MTSA	**160.46**	**18**	**56**	**3.11**	**311**
Bowmanville MTSA	**127.10**	**380**	**724**	**1.91**	**1,854**
Oshawa Downtown McCA	296.88	3,333	6,391	1.92	5,662
Windfields MnCA	84.18	144	409	2.84	-
Central Oshawa MTSA	**146.47**	**2,245**	**4,630**	**2.06**	**587**
Thornton's Corners MTSA	**69.65**	**-**	**-**	**-**	**210**

Downtown Oshawa UGC	101.00	1,994.00	3,085	1.55	7,574
Pickering MTSA	**79.29**	**1,100**	**1,972**	**1.79**	**6,000**
Pickering City Centre UGC	138.50	2,135	4,728	2.21	6,675
Port Perry MnCA	32.81	322	420	1.30	1,719
Uxbridge Downtown	61.59	492	776	1.58	1,198
Downtown Whitby MrCA	229.64	3,234	6,068	1.88	4,550
Brock-Taunton MrCA	129.33	752	1,811	2.41	4,725
Baldwin-Winchester MrCA	79.71	438	1,173	2.68	1,084
Whitby WP	124.03	-	-	-	-
Newcastle WP	25.51	-	-	-	-
Bowmanville WP	80.90	-	-	-	-
Oshawa WP	-	-	-	-	-
Whitby MTSA	**106.79**	**818**	**1,389**	**1.70**	**269**

10.2. Appendix B: Applying the Methodology to a Centre and a Corridor

10.2.1 Soft Site Analyis in a Centre: Ajax Downtown Regional Centre

The methodology in Chapter 5 is demonstrated below using Ajax Downtown Regional Centre.

Figure A-B-10-1: Town of Ajax Official Plan, Schedule E: Ajax Downtown Regional Centre

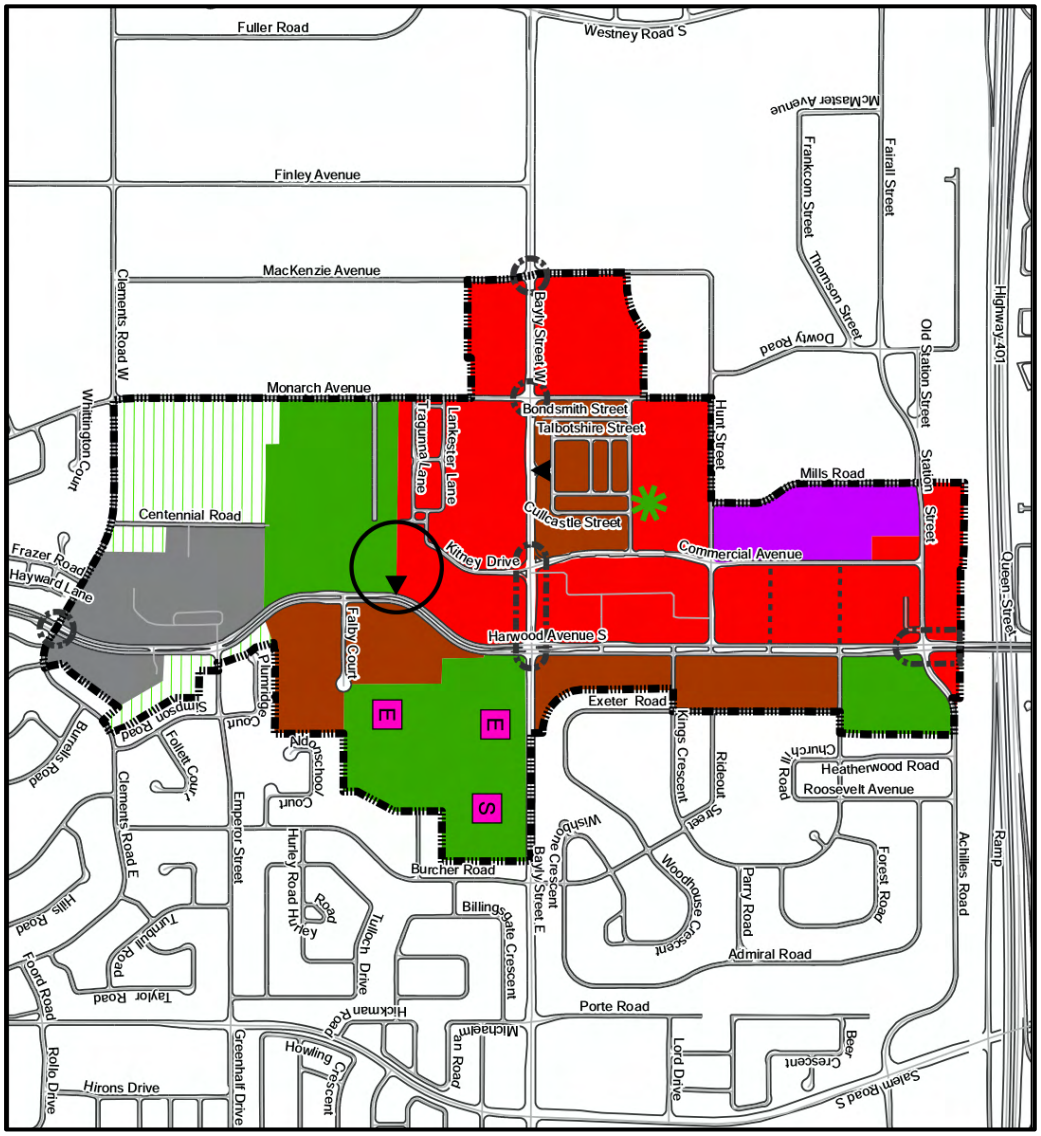
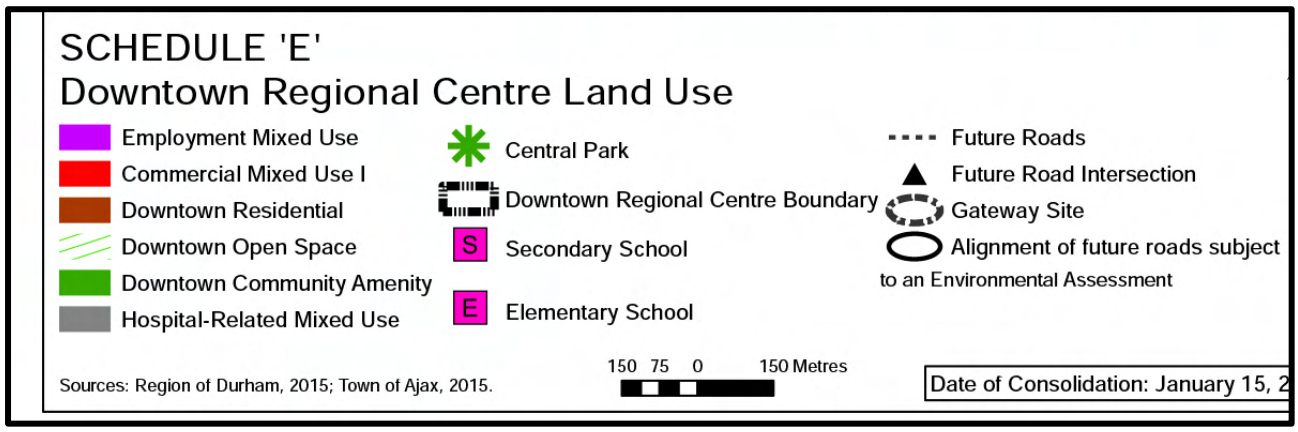


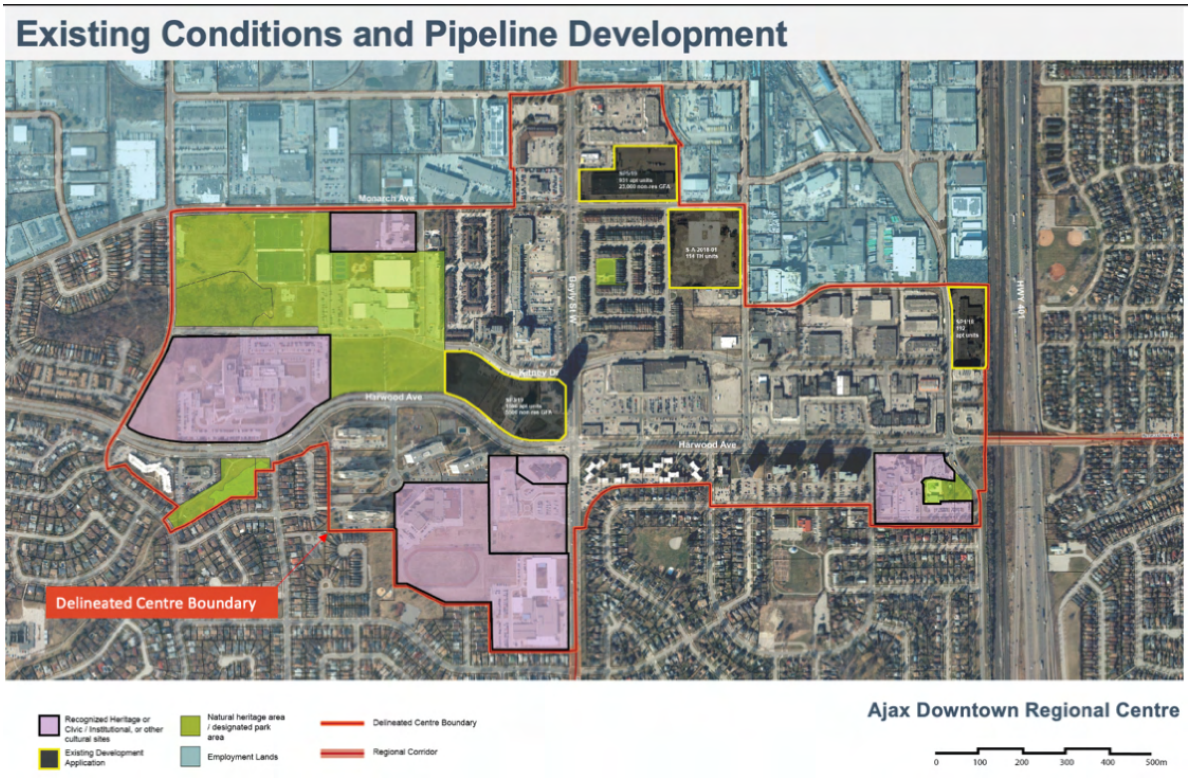
Figure A-B-10-2: Town of Ajax Schedule E, Downtown Regional Centre Land Use



Schedule E from the Town of Ajax Official Plan demonstrates the general urban structure intended for the Downtown.

1. **Identify existing conditions/Pipeline projects**

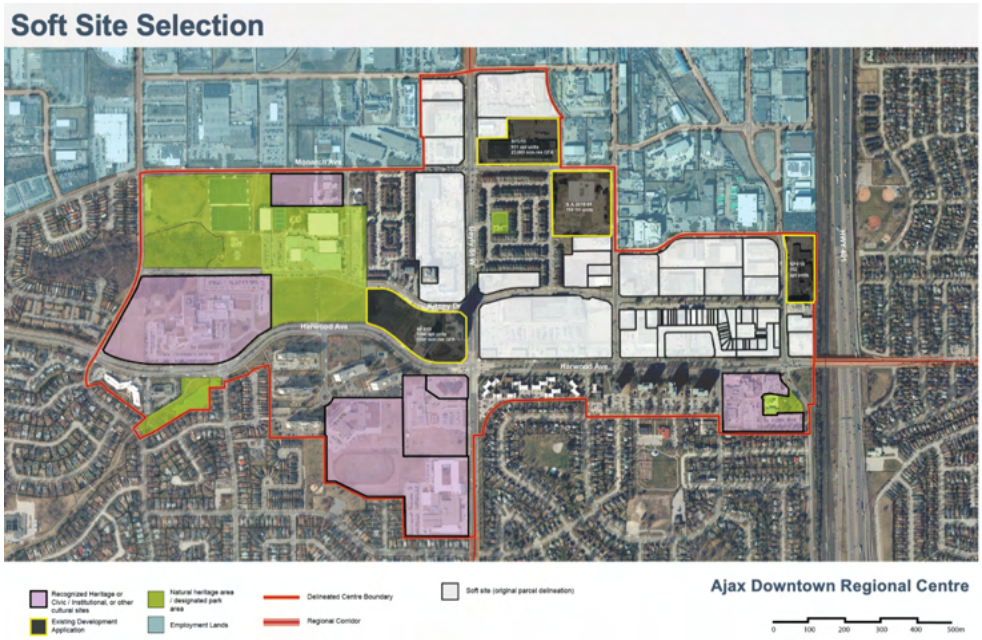
Figure A-B-10-3: Review existing conditions and pipeline development of area



The first step is identifying the existing conditions and pipeline development of the growth area.

2. Select soft Sites

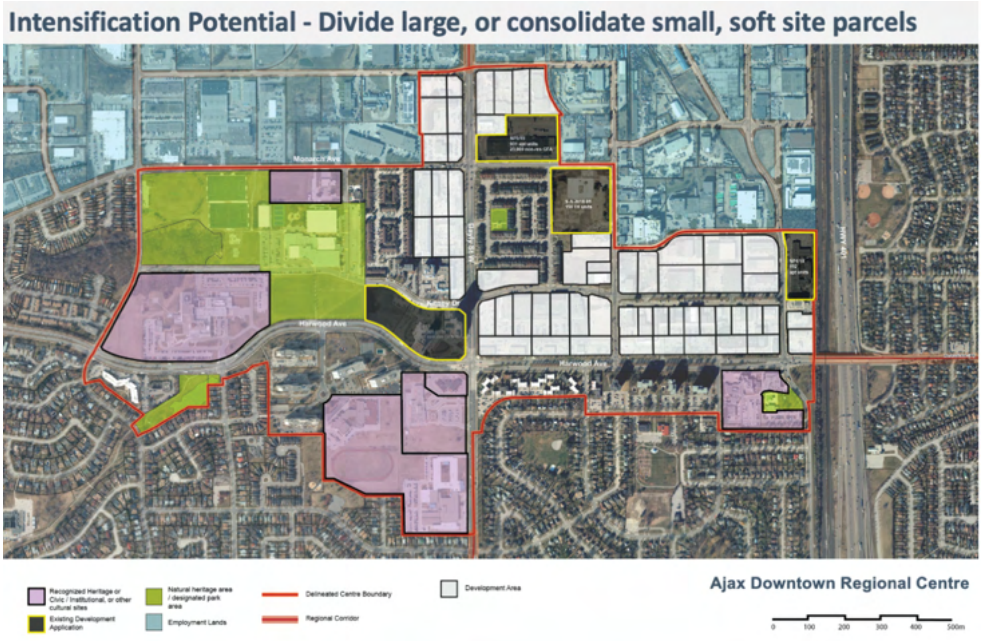
Figure A-B-10-4: Soft site selection in growth area



The next step is identifying which sites are soft sites i.e.: are suitable for development and/or intensification.

3. Divide/Assemble soft sites into Prototypical Development Areas

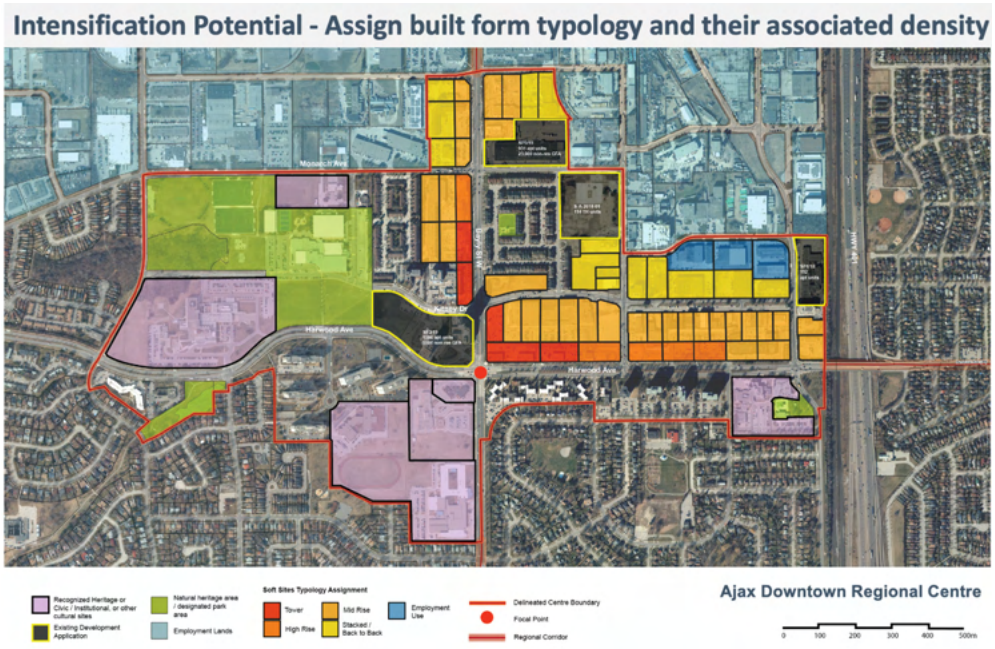
Figure A-B-10-5: Divide soft sites into prototypical development areas



The large softs sites are subdivided into prototypical development areas.

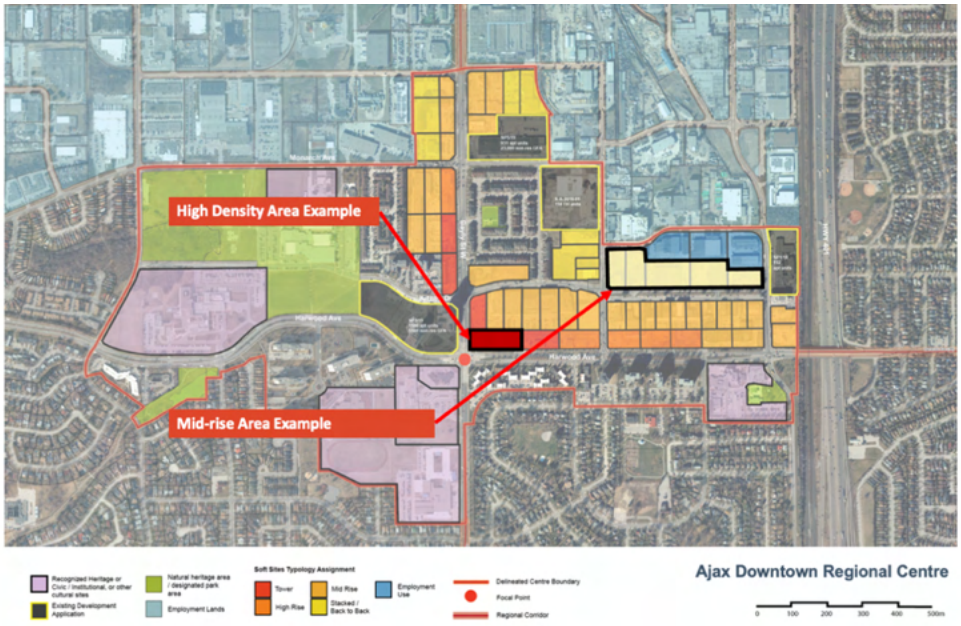
4. **Assign Typologies and determine commercial opportunity (yes or no)**

Figure A-B-10-6: Apply Typologies to Soft Sites



Soft site typologies are then applied to the prototypical soft development areas in consideration of local context and land use objectives.

Figure A-B-10-7: Example areas to demonstrate calculation process



5. Calculate Summary: Number of units, people and jobs; revise Typologies necessary

Below is a table demonstrating the calculation process for the two soft site example areas identified on the diagram above.

Figure A-B-10-8: High Density Area Example

Step	Calculation	Result
Calculate area (ha)	0.5 ha	
Apply typology	Tower	
Adjust site are to account for gross to net factor	0.5 ha * 60% factor	0.30 ha
Divide adjusted site into Residential and Non-residential shares (in ha)	Residential share: 0.30 * 90% Non-Residential share: 0.30 * 10%	Residential Share: 0.27 ha Non-Residential Share 0.03ha
Residential Share – • Apply Unit per Hectare (UPH) to derive units: **UPH*share** • Apply People per Unit to derive people	600 UPH * 0.27 ha 1.72 PPU * 162 units	162 units 279 people
Non-Residential Share-		

• Calculate total non-residential GFA from: **FSI*share** • Derive jobs by applying GFA per employee	6.0 FSI * 0.03 ha 1,800 / 35 (Tower)	1,800 GFA (m^2) 51 jobs

Figure A-B-10-9: Mid Rise Density Area Example

Step	**Calculation**	**Result**
Calculate area (ha)	3.5 ha	
Apply typology	Mid-rise	
Adjust site are to account for gross to net factor	3.5 ha * 75% factor	2.63 ha
Divide adjusted site into Residential and Non-residential shares (in ha)	Residential share: 2.63 * 80% Non-Residential share: 2.63 * 20%	Residential Share: 2.10 ha Non-Residential Share 0.53 ha
Residential Share – • Apply Unit per Hectare (UPH) to derive units: **UPH*share** • Apply People per Unit to derive people	125 UPH * 0.27 ha 1.28 PPU * 263 units	263 units 451 people
Non-Residential Share- • Calculate total non-residential GFA from: **FSI*share** • Derive jobs by applying GFA per employee	2.0 FSI * 0.53 ha 10,600 / 35 (Mid-rise)	10,600 (m^2) 303 jobs

Ajax Downtown Regional Centre – Preliminary Potential Supply Side Yields (since revised)

Figure A-B-10-10: Ajax Downtown Regional Centre - Preliminary Potential Supply Side Yields

Existing					**Intensification Potential**				**Net Total Yields** (net after replacement of existing development areas and addition of pipeline people and jobs			
Total Land Area (ha)	Units	People	Jobs	Ppl+jobs /ha (PJH)	Pipeline Units	Units	People	Jobs	Total Units	Total People	Total Jobs	PJH
144	2,385	7,100	2,700	68	2,837	4,860	9,560	2,110	10,090	21,690	3,850	177

Total Units per Hectare: 70 (under target)

Total People and Jobs per Hectare: 177

ROP Density target: 75 units per gross hectare; 2.5 FSI minimum

Local OP Target: 1,850 units and 3,500 population to 2031

The total land area of the SGA includes a takeout for the Natural Heritage area. There are no utility takeouts.

The above process is for the purpose of demonstration. The actual output has been revised in consultation with the Region and Area municipality over the course of the study.

Soft Site Analysis on a Corridor: Whitby, Dundas Street Segment 7

The following illustrates the application of the methodology to a Regional Corridor, Dundas Street in Whitby.

Figure A-B-10-11: Dundas Street Segment 7

1. **Identify existing conditions/Pipeline projects**

Figure A-B-10-12:Whitby Land Use Official Plan: Schedule A

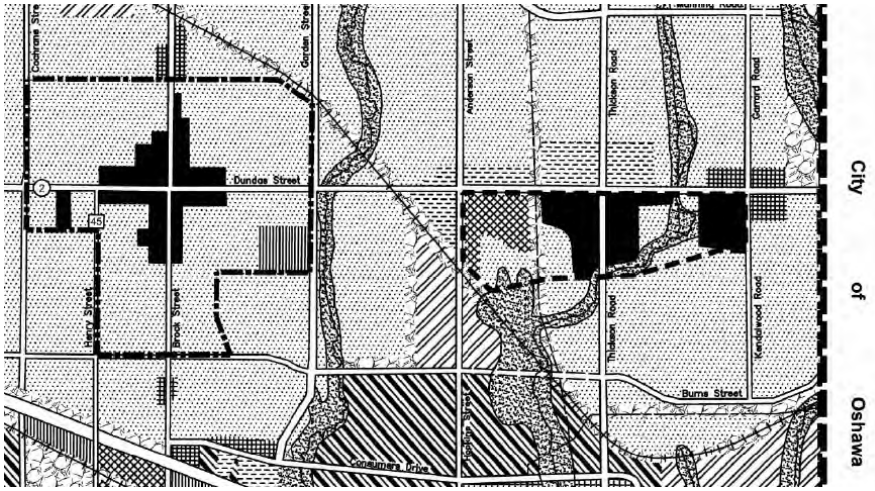


Figure A-B-10-13: Figure 6 29: Whitby Official Plan Schedule A: Legend

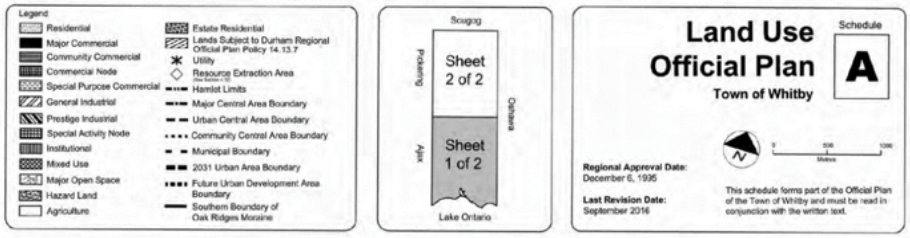


Figure A-B-10-14: Dundas Street Pipeline Application Sites Identified

2. **Select soft Sites**

Figure A-B-10-15: Soft Sites identified based on parcel data

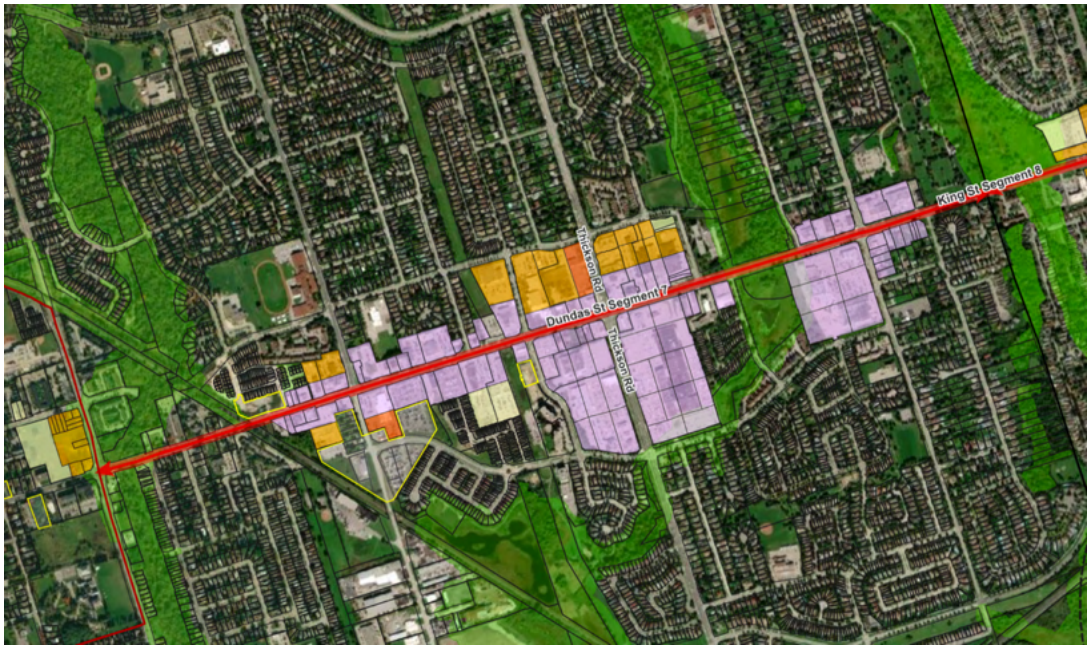
3. **Divide/Assemble soft sites into Prototypical Development Areas**

Figure A-B-10-16: Soft Sites divided into Prototypical Development Areas

4. Assign Typologies and determine commercial opportunity (yes or no)

The Whitby Official Plan designates areas along Dundas Street east of the rail corridor as a 'Mixed Use', 'Special Purpose Commercial', and 'Major Commercial' (see below). This informs the selection of Typologies, directing for an integration of commercial and residential uses.

Figure A-B-10-17: Soft Sites assigned typologies; commercial opportunity viable for all sites facing corridors



5. **Calculate Summary: Number of units, people and jobs; revise Typologies if necessary**

Figure A-B-10-18: Sample Area selected for summary

Figure A-B-10-19: Nodal Mixed-Use (Sample Area) Example

Step	**Calculation**	**Result**
Calculate area (ha)	3.5 ha	
Apply typology	Nodal Mixed-Use	
Adjust site are to account for gross to net factor	3.5 ha * 60% factor	2.1 ha
Divide adjusted site into Residential and Non-residential shares (in ha)	Residential share: 2.1 * 50% Non-Residential share: 2.1 * 50%	Residential Share: 1.05 ha Non-Residential Share 1.05 ha
Residential Share – • Apply Unit per Hectare (UPH) to derive units: **UPH*share** • Apply People per Unit to derive people	350 UPH * 1.05 ha 1.58 PPU(Whitby)* 367.5 Units	**368 units** **581 people**
Non-Residential Share- • Calculate total non-residential GFA from: **FSI*share** • Derive jobs by applying GFA per employee	2.0 FSI * 1.05 ha 21,000 / 35 (Nodal M-U)	21,000 (m^2) **600 jobs**

The Sample Area identified along Dundas Road Segment 7 has an area of 3.5ha, which translates to 368 units containing 581 people, and sufficient commercial area to support 600 employees.

Figure A-B-10-20: Whitby, Dundas Street Segment 7 – Potential Supply Side Yields

Intensification Potential				**Net Out**	**Net Total Yields** (net after replacement of existing development areas and addition of pipeline people and jobs		
Pipeline Units	Units	People	Jobs	Jobs	Total Units	Total People	Total Jobs
270	5,556	8,925	8,031	-477	5,826	9,351	7,554

The total output for the Dundas Street Segment 7 in Whitby is an increase of 5,826 units, 9,351 people, and 7,554 jobs.

10.3. Appendix C: Housing Intensification Study Data Package

Figure A-C-1: Total People and Housing Units in Durham

Total Summary Figures – Supply/Demand (rounded to nearest hundred)

Region of Durham

People
317,600 by Intensification
+27,900 in Designated Greenfield Area
352,100 Total

Units
177,700 Units by intensification
+20,000 in Designated Greenfield Area
197,700 Total

Figure A-C-2: Southern Area Municipalities Soft Sites Potential Supply and Pipeline (People)

Southern Area Municipalities Soft Sites Potential Supply + Pipeline Developments (people)
Not including Secondary Units and Local Centres and Corridors

Pickering
20,807 Centres
29,244 Corridors
28,135 Pipeline
-887 Net Out
77,299 total

Whitby
25,583 Centres
17,058 Corridors
8,526 Pipeline
-170 Net Out
51,024

Clarington
37,895 Centres
11,756 Corridors
3,755 Pipeline
0 Net out
53,407

Ajax
38,783 Centres
4,944 Corridors
12,331 Pipeline
-685 Net Out
53,374

Oshawa
45,078 Centres
26,586 Corridors
19,357 Pipeline
-577 Net Out
90,443

Totals Southern Municipalities
168,100 Centres
89,600 Corridors
72,100 Pipeline
-2,320 Net out

327,500 Total

Figure A-C-3: Southern Area Municipalities Soft Sites Potential Supply and Pipeline (Housing Units)

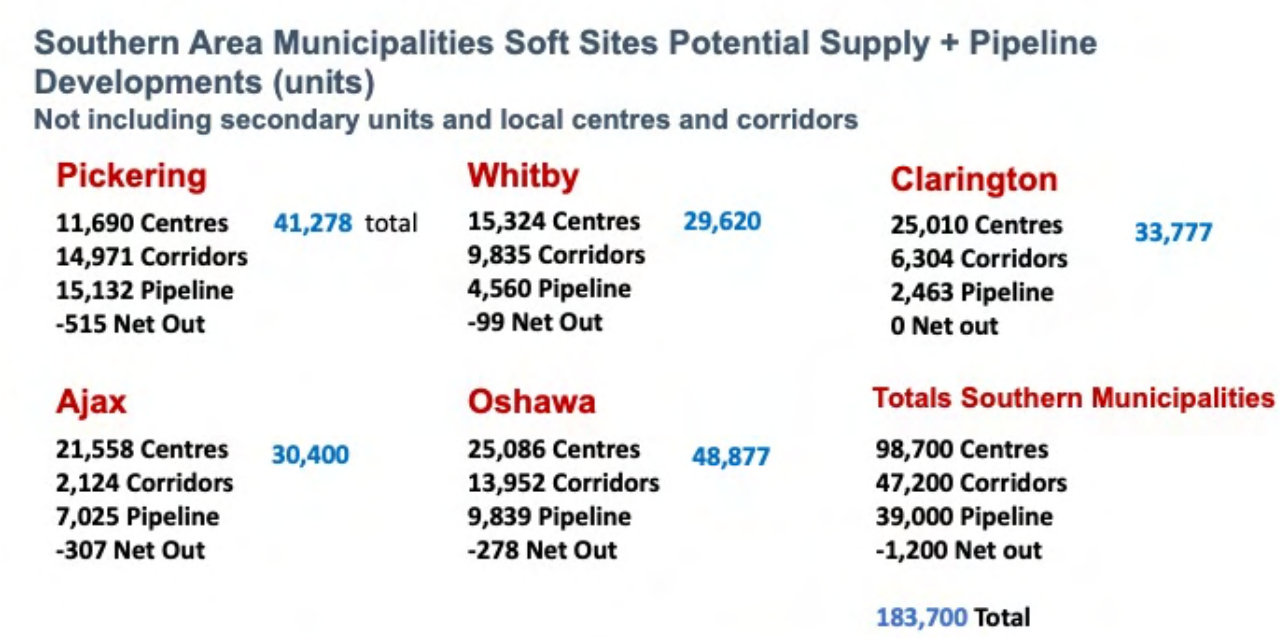


Figure A-C-4: Northern Area Municipalities Soft Sites Potential Supply (People and Units)

Figure A-C-5: Summary of Intensification Analysis Total Housing Unit Supply by Municipality

Results of Intensification Analysis to 2051 (Supply and Demand)

Resultant Total Outputs; DGA not removed

	TOTAL	Pickering	Ajax	Whitby	Oshawa	Clarington	Uxbridge	Scugog	Brock
Units	198,400	45,630	31,570	33,550	50,700	34,450	620	1,930	360
People	354,400	85,020	57,550	57,240	94,200	54,390	1,330	3,990	640
Jobs	138,300	20,420	15,940	31,740	30,000	38,890	220	860	250

The following figures demonstrate the soft sites analysis and outputs for the candidate Strategic Growth Areas and Corridors.

Figure A-C-6: Intensification Analysis Typology Assumptions and Surface Colour

Intensification Model Typologies and Assumptions

Building Typologies	Number of storeys	Gross site to net site factor	Floor Space Index (FSI)	Non-Res GFA Share	Units per Hectare (UPH)	People per Unit (PPU)	Floor space per worker (FSW)
Tower	Over 12	40%	6.0	10%	600	1.47 – 1.78	35
High rise	7-12	25%	2.5	10%	350	1.47 – 1.78	35
Mid rise*	3-6	25% or 12.5%	1.0 or 2.0	20% or 30%	125	1.47 – 1.78	35
Stacked or Back to Back Townhouse	2-4	0%	1.0	0	85	2.55 – 2.98	-
Traditional Townhouse	2-4	0%	1.0	0	50	2.55 – 2.98	-
Major Office	7-12	40%	2.5	100%	n/a	n/a	19
Employment Intensification	7-12	40%	2.5	100%	n/a	n/a	19
Mid-rise Employment	3-8	25%	2.0	100%	n/a	n/a	56
Nodal Mixed-Use	Minimum 3 (residential portion)	25%	2.0	50%	Minimum 125	1.47 – 1.78	35

*Values different for Northern and Southern municipalities

Figure A-C-7: Pickering MTSA and Urban Growth Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Pickering

MTSA
10,737 units
19,165 people
14,161 jobs
420 ppl+jbs/ha

UGC
18,137 units
23,620 people
14,508 jobs
275 ppl+jbs/ha

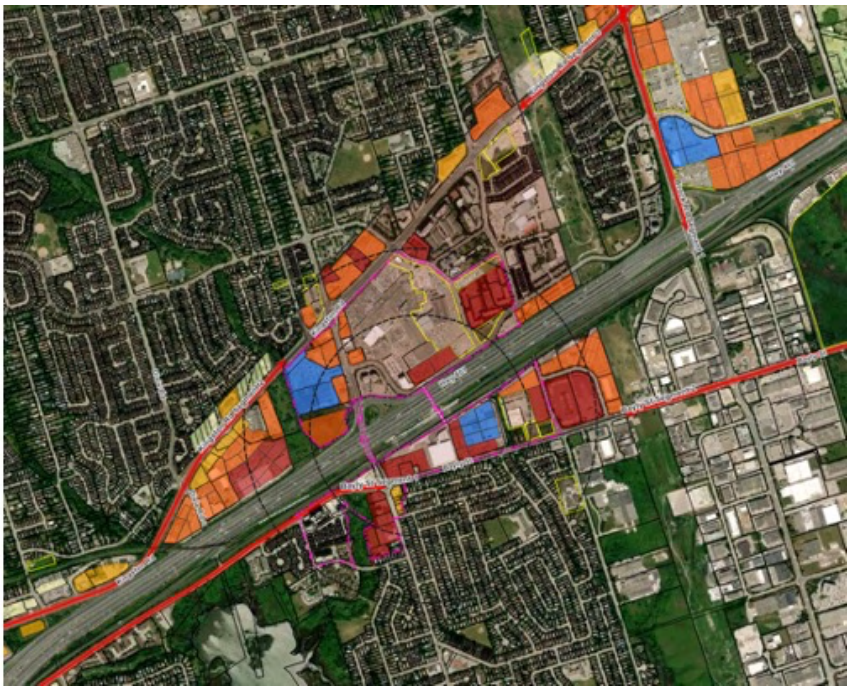


Figure A-C-8: Ajax Uptown Regional Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Ajax Uptown Regional Centre

Regional Centre
12,378 units
22,718 people
10,884 jobs
316 ppl+jbs/ha

Figure A-C-9: Ajax MTSA and Downtown Regional Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Ajax: MTSA and DT Regional Centre

MTSA

6,011 units
10,338 people
6,558 jobs
374 ppl+jbs/ha

DT Regional Centre

11,171 units
20,772 people
7,185 jobs
193 ppl+jbs/ha

Figure A-C-10: Whitby Downtown Major Central Area Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Whitby: Downtown Major Central Area

Major Central Area

6,688 units
12,738 people
6,715 jobs
85 ppl+jbs/ha

Figure A-C-11: Whitby MTSA nd Waterfront Place Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Whitby: MTSA and Waterfront Place

MTSA

7,906 units
12,809 people
7,355 jobs
189 ppl+jbs/ha

Waterfront Place

4,175 units
6,827 people
1,386 jobs
66 ppl+jbs/ha

Figure A-C-12: Brock/Taunton Major Central Area Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Whitby: Brock/Taunton Major Central Area

Major Central Area

6,393 units
10,784 people
12,823 jobs
182 ppl+jbs/ha

Figure A-C-13: Baldwin/Winchester Major Central Area Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Whitby:
Baldwin/Winchester
Major Central Area

Major Central Area

2,313 units
4,876 people
2,406 jobs
91 ppl+jbs/ha

Figure A-C-14: Thornton's Corners MTSA Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Oshawa: Thornton Corners MTSA

MTSA

5,313 units
9,192 people
6,213 jobs
221 ppl+jbs/ha

Figure A-C-15: Central Oshawa MTSA Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Central Oshawa MTSA

MTSA

10,827 units
20,098 people
3,384 jobs
160 ppl+jbs/ha

Figure A-C-16: Downtwon Oshawa Urban Growth Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Downtown Oshawa Urban Growth Centre

UGC

9,350 units
16,714 people
8,924 jobs
254 ppl+jbs/ha

Figure A-C-17: Oshawa Downtown Main Central Area Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Oshawa Downtown Main Central Area

DT Central Area
14,839 units
26,586 people
9,609 jobs
122 ppl+jbs/ha

Figure A-C-18: Oshawa Waterfront Place Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Oshawa: Waterfront Place

Waterfront Place
1,592 units
1,778 people
628 jobs
- ppl+jbs/ha

Figure A-C-19: Windfields Main Central Area Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Oshawa: Windfields Main Central Area

Central Area

3,491 units
7,902 people
2,201 jobs
120 ppl+jbs/ha

(some pipeline projects not reflected on adjacent map)

Figure A-C-20: Courtice MTSA Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Courtice MTSA: Scenario 1

MTSA

13,154 units
19,365 people
24,392 jobs
273 ppl+jbs/ha

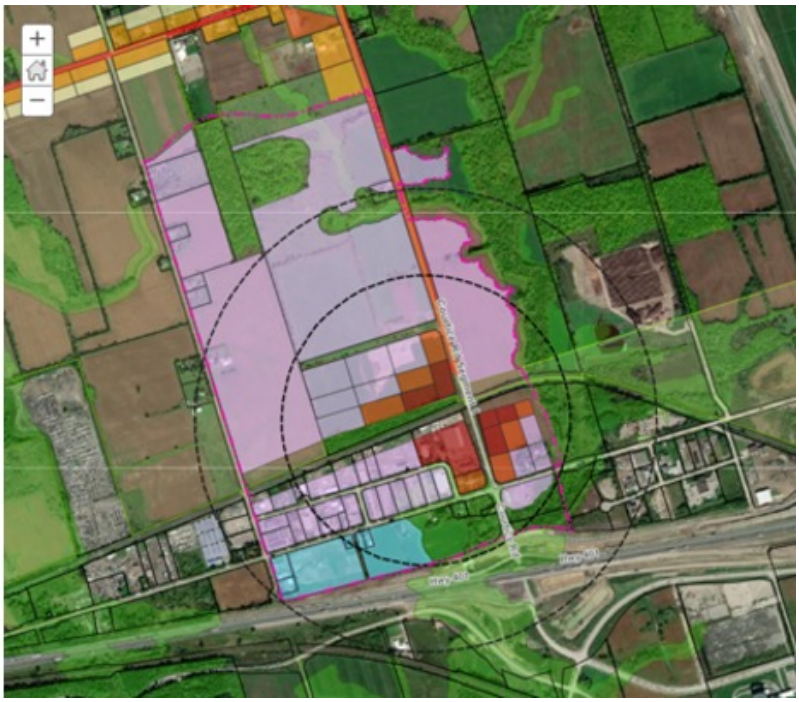


Figure A-C-21: Courtice Urban Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Courtice Urban Centre

Urban Centre

842 units
1,246 people
1,257 jobs
127 ppl+jbs/ha

Figure A-C-22: Bowmanville West Urban Area and MTSA Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Bowmanville: West Urban Area and MTSA

MTSA

9,637 units
14,751 people
7,957 jobs
179 ppl+jbs/ha

Urban Area West

9,158 units
14,101 people
7,329 jobs
176 ppl+jbs/ha

Figure A-C-23: Bowmanville East Urban Area Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Bowmanville:
East Urban Area

Urban Area East

3,231 units
5,542 people
4,631 jobs
170 ppl+jbs/ha

Figure A-C-24: Newcastle Village Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Newcastle Village Centre

Village Centre

819 units
1,332 people
989 jobs
125 ppl+jbs/ha

Figure A-C-25: Newcastle and Bowmanville Waterfront Places Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Newcastle / Bowmanville Waterfront Places

Bowmanville Waterfront Place

203 units
299 people
232 jobs
7 ppl+jbs/ha

Newcastle Waterfront Place

160 units
235 people
183 jobs
16 ppl+jbs/ha

Figure A-C-26: Brock/Taunton Major Central Area Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Scugog

Port Perry Main Central Area

2,157 units
4,252 people
2,579 jobs
208 ppl+jbs/ha

Figure A-C-27: Uxbridge Downtown Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Uxbridge

Uxbridge Downtown

1,010 units
1,933 people
1,415 jobs
54 ppl+jbs/ha

Figure A-C-28: Beaverton Regional Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Brock

Beaverton Regional Centre

269 units
464 people
384 jobs
49 ppl+jbs/ha

Figure A-C-29: Cannington Regional Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Brock

Cannington Regional Centre

160 units
289 people
211 jobs
65 ppl+jbs/ha

Figure A-C-30: Sunderland Regional Centre Summary Supply Total People, Units and Jobs with People and Jobs Per Hectare Density

Brock

Sunderland Regional Centre

167 units
311 people
188 jobs
43 ppl+jbs/ha

Figure A-C-31: Pickering Whites Road Segments 1 and 2 Summary Supply Total People, Units and Jobs

Pickering
Whites Rd Segment 1 & 2

Segment 1
532 units
947 people
834 jobs

Segment 2
0 units
0 people
0 jobs

Figure A-C-32: Pickering Brock Road Segments 1 and 2 Summary Supply Total People, Units and Jobs

Pickering
Brock Road Segment 1 & 2

Segment 1
3,491 units
6,213 people
3,996 jobs

Segment 2
3,179 units
8,128 people
32 jobs

Figure A-C-33: Pickering Kingston Road Segments 1 and 2 Summary Supply Total People, Units and Jobs

Figure A-C-34: Pickering Kingston Road Segment 3 Summary Supply Total People, Units and Jobs

Figure A-C-35: Pickering Bayly Road Segments 1 and 2 Summary Supply Total People, Units and Jobs

Pickering
Bayly St Segment 1 & 2

Segment 1
377 units
805 people
375 jobs

Segment 2
1,650 units
2,937 people
1,996 jobs

Figure A-C-36: Ajax Taunton Road Segments 1 and 3 Summary Supply Total People, Units and Jobs

Ajax
Taunton Rd Segment 1 & 3

Segment 1
389 units
669 people
0 jobs

Segment 3
96 units
286 people
0 jobs

Figure A-C-37: Ajax Kingston Road Segments 4 and 5 Summary Supply Total People, Units and Jobs

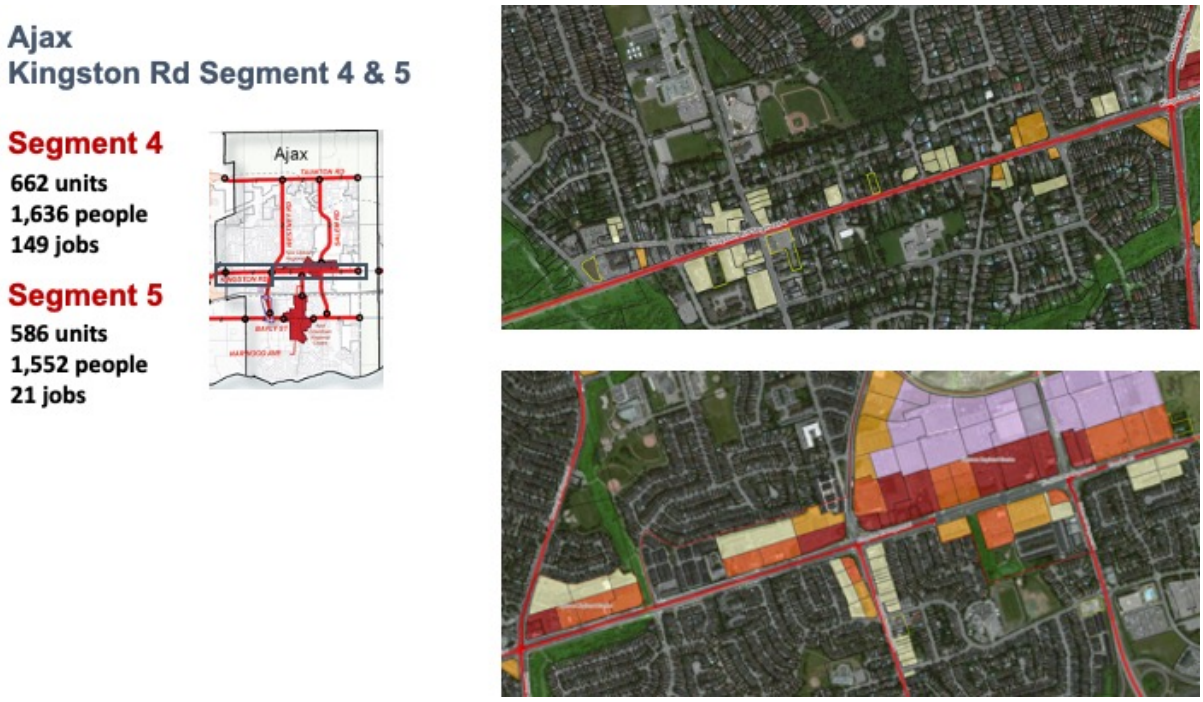


Figure A-C-38: Ajax Bayly Street Segments 3 and 4 Summary Supply Total People, Units and Jobs

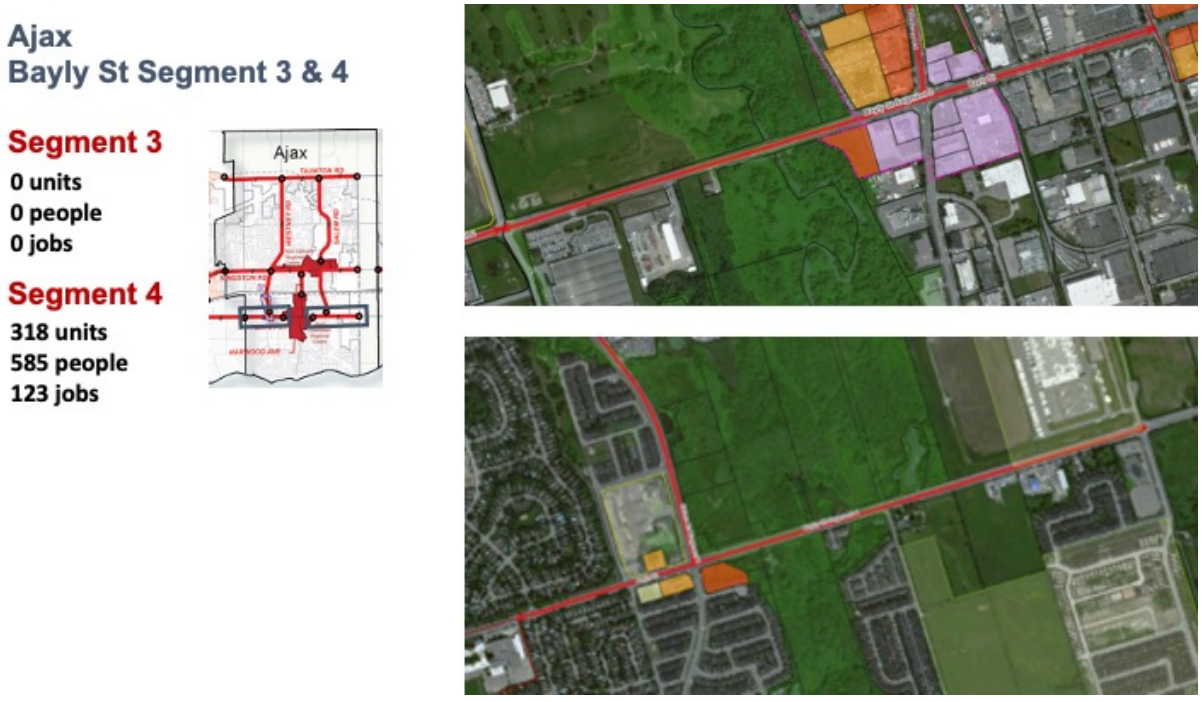


Figure A-C-39: Ajax Westney Road Segments 1 and 2 Summary Supply Total People, Units and Jobs

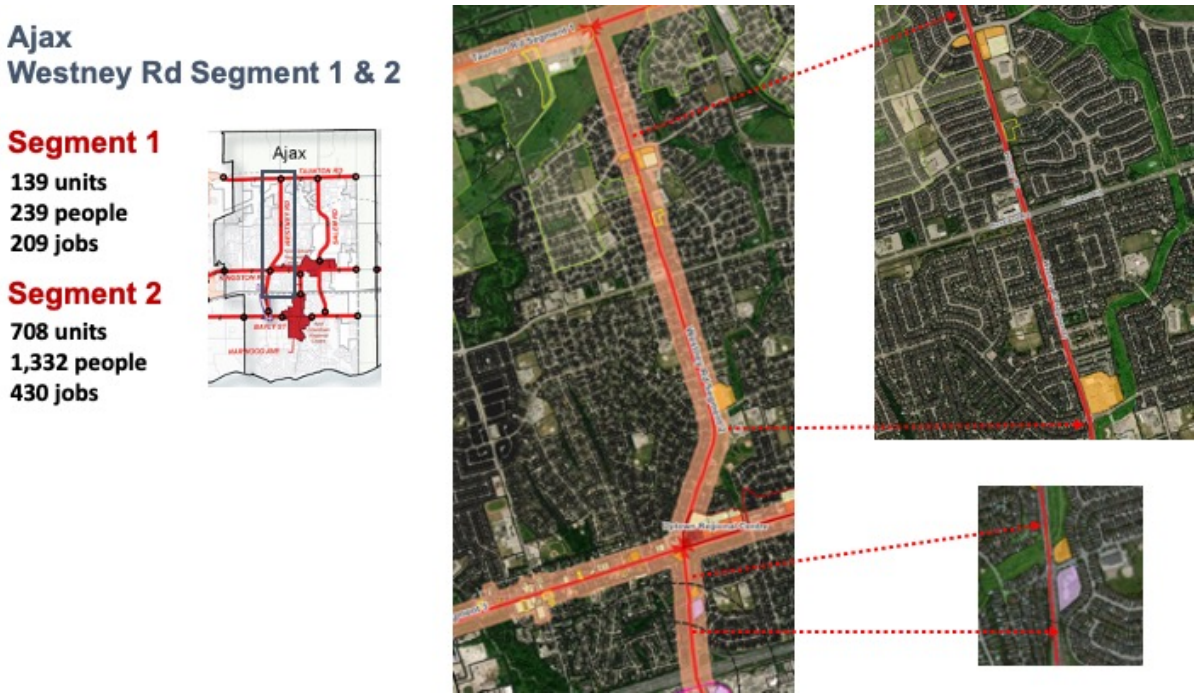


Figure A-C-40: Ajax Salem Road Segments 1 and 2 Summary Supply Total People, Units and Jobs

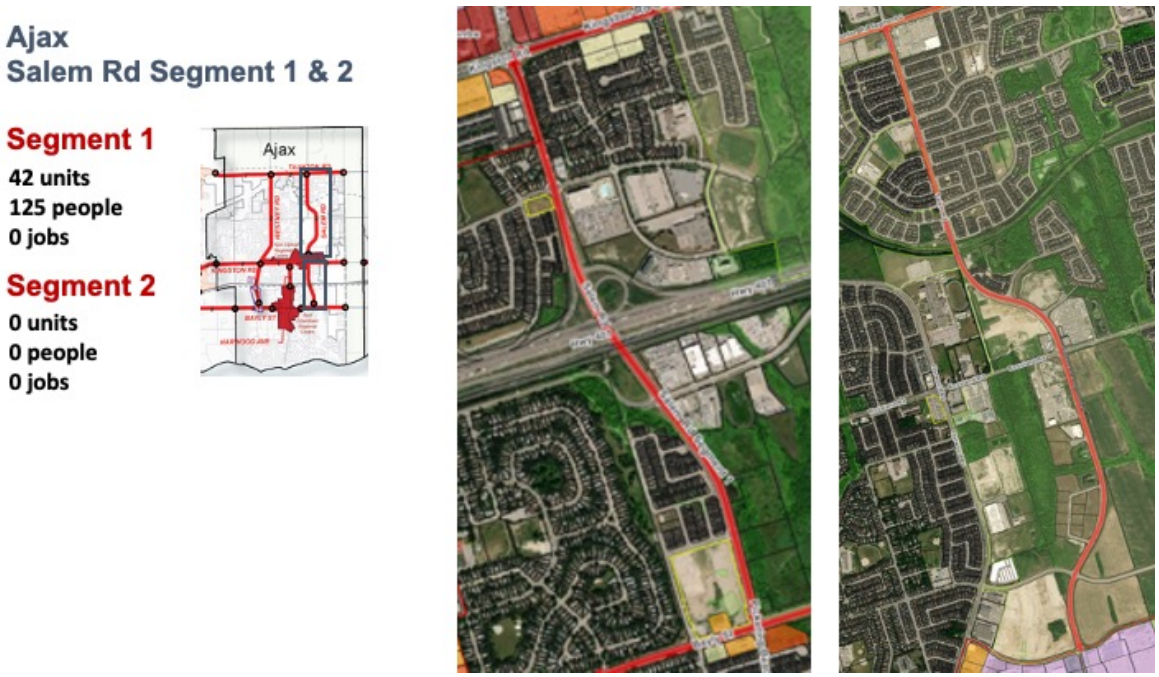


Figure A-C-41: Ajax Harwood Avenue Segment 1 Summary Supply Total People, Units and Jobs

Ajax
Harwood Ave Segment 1

Segment 1
218 units
466 people
14 jobs

Figure A-C-42: Whitby Brock Street Segment 2 Summary Supply Total People, Units and Jobs

Whitby
Brock St Segment 2

Segment 2
1,261 units
2,524 people
965 jobs

Figure A-C-43: Whitby Baldwin Street Segment 4 and Winchester Road Segment 2 Summary Supply Total People, Units and Jobs

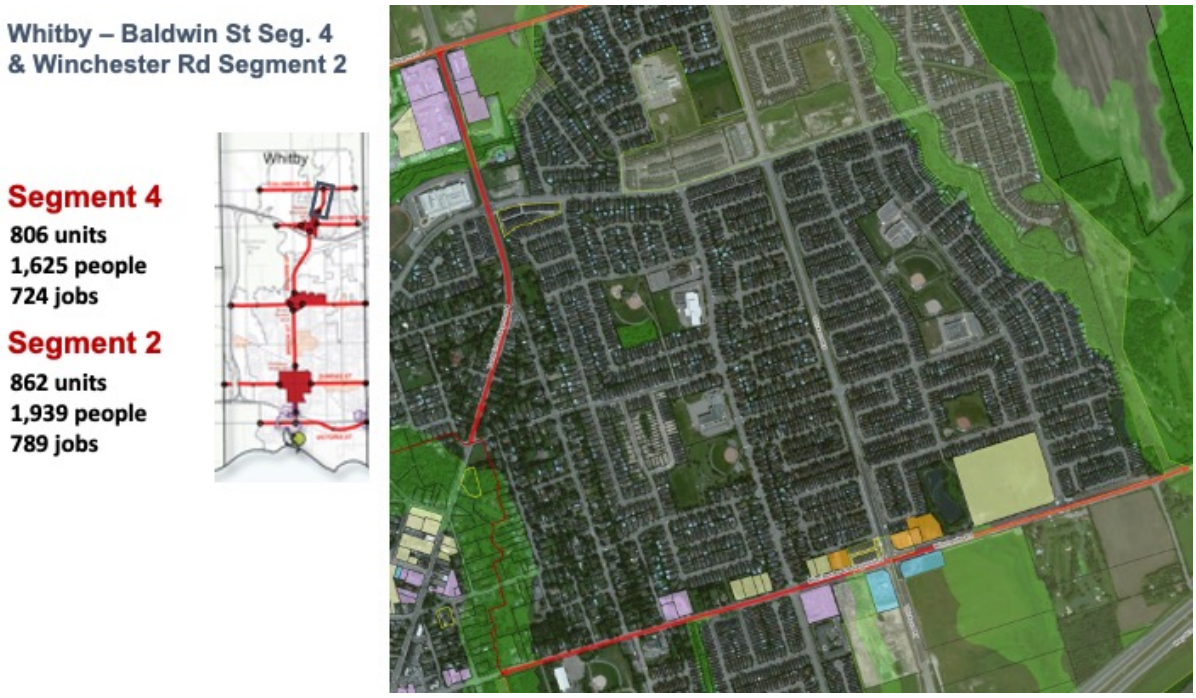


Figure A-C-44: Whitby Dundas Street Segments 6 and 7 Summary Supply Total People, Units and Jobs

Figure A-C-45: Whitby Taunton Road Segment 5 Summary Supply Total People, Units and Jobs

Whitby
Taunton Rd Segment 5

Segment 5
1,031 units
1,731 people
1,548 jobs

Figure A-C-46: Oshawa King Street Segment 8 Summary Supply Total People, Units and Jobs

Oshawa
King St Segment 8

Segment 8
881 units
1,663 people
785 jobs

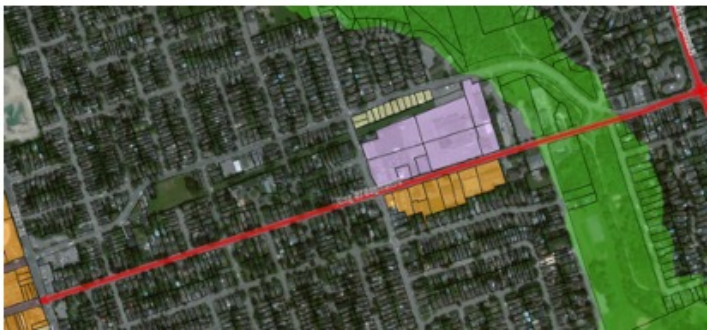


Figure A-C-47: Oshawa Simcoe Street Segment 1 Summary Supply Total People, Units and Jobs

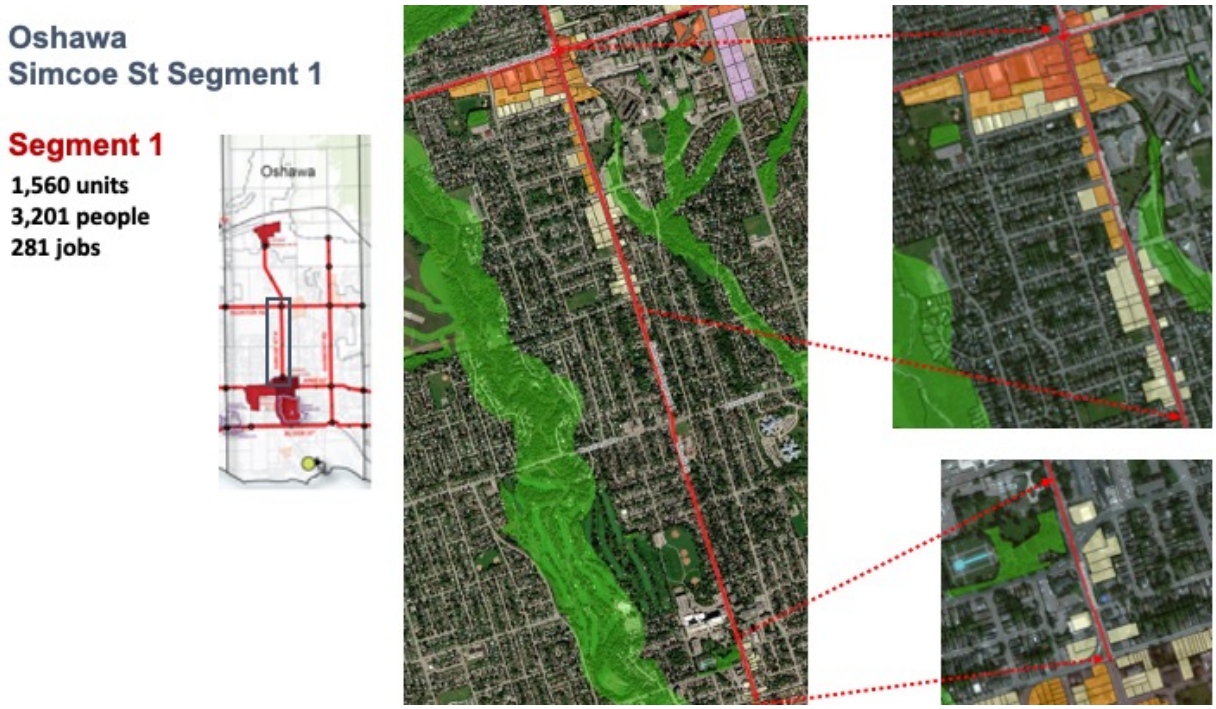


Figure A-C-48: Oshawa Simcoe Street Segment 8 Summary Supply Total People, Units and Jobs

Figure A-C-49: Oshawa Bloor Street Segment 8 Summary Supply Total People, Units and Jobs

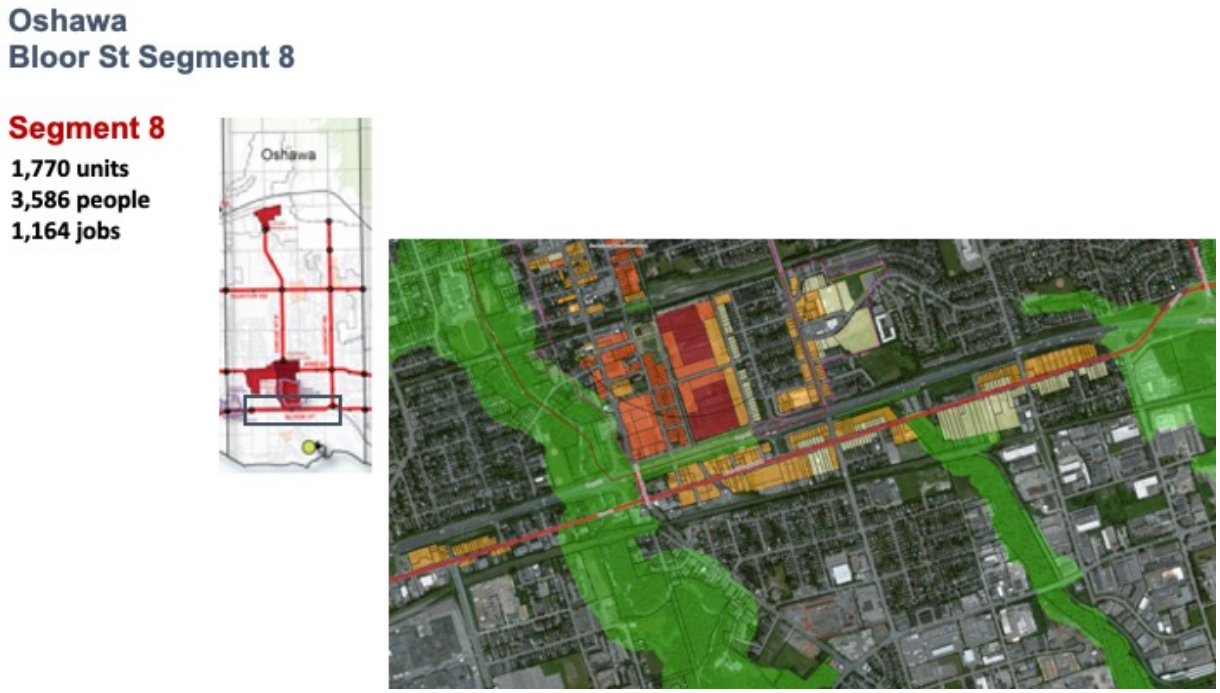


Figure A-C-50: Oshawa Taunton Road Segments 6, 7 and 8 Summary Supply Total People, Units and Jobs

Figure A-C-51: Oshawa Harmony Road Segment 8 Summary Supply Total People, Units and Jobs

Figure A-C-52: Oshawa/Clarington King Street Segments 9 and 10 Summary Supply Total People, Units and Jobs

Figure A-C-53: Clarington King Street Segments 11 and 12 Summary Supply Total People, Units and Jobs

Figure A-C-54: Clarington Bloor Street Segment 10 Summary Supply Total People, Units and Jobs

Figure A-C-54: Durham Corridor Segments without Soft Sites or Pipeline Intensification Potential

Please note the following segments did not have any intensification soft sites or development applications

- Bayly St Segment 3 (Ajax)
- Salem Rd Segment 2 (Ajax)
- Taunton Rd Segment 2 (Ajax)
- King St Segment 12 (Clarington)
- Bloor St Segment 7 & 9 (Oshawa)
- Harmony Rd Segments 2, 3, & 4 (Oshawa)
- Whites Rd Segment 2 (Pickering)
- Baldwin St Segment 3 (Whitby)
- Columbus Rd Segment 1 & 2 (Whitby)
- Taunton Rd Segment 4 (Whitby)
- Victoria St Segment 5 & 6 (Whitby)
- Winchester Rd Segment 1 (Whitby)

10.4. Appendix D: SGA Summary Potential Densities and Minimum Densities

Figure A-D-10-21: SGA Potential Density and Minimum Density

Candidate SGA Potential Density compared to Minimum Density						
Candidate Strategic Growth Area	**Area (ha)**	**Population**	**Jobs**	**Density (P&J/ha)**	**GP Density Target (PJH)**	**ROP Density Target (UPH)**
Ajax Uptown Regional Centre	106.46	22,718	10,884	316	n/a	75
Ajax Downtown Regional Centre	144.60	20,772	7,185	193	n/a	75
Ajax MTSA	45.20	10,338	6,558	374	150	n/a
Beaverton Regional Centre	17.28	464	384	49	n/a	15
Cannington Regional Centre	7.65	289	211	65	n/a	15
Sunderland Regional Centre	11.49	311	188	43	n/a	15
Courtice Urban Area	19.76	1,246	1,257	127	n/a	75
Bowmanville West Urban Area	121.46	14,101	7,329	176	n/a	75
Bowmanville East Urban Area	59.92	5,542	4,631	170	n/a	75
Newcastle Village Centre	18.52	1,332	989	125	n/a	75
Courtice MTSA	160.46	19,365	24,392	273	150	n/a
Bowmanville MTSA	127.10	14,751	7,957	179	150	n/a
Oshawa Downtown Main Central Area	296.88	26,586	9,609	122	n/a	75
Windfields Main Central Area	84.18	7,902	2,201	120	n/a	75
Central Oshawa MTSA	146.47	20,098	3,384	160	150	n/a
Thorntons Corners MTSA	69.95	9,192	6,213	221	150	n/a
Oshawa GO MTSA	26.70	-	343	13	150	n/a

Downtown Oshawa Urban Growth Centre	101.00	16,714	8,924	254	200	n/a
Pickering MTSA	79.29	19,165	14,161	420	150	n/a
Pickering City Centre Urban Growth Centre	138.50	23,620	14,508	275	200	n/a
Port Perry Main Central Area	32.81	4,252	2,579	208	n/a	75
Uxbridge Downtown	61.59	1,933	1,415	54	n/a	15
Downtown Whitby Major Central Area	229.64	12,738	6,715	85	n/a	75
Brock-Taunton Major Central Area	129.33	10,734	12,823	182	n/a	75
Baldwin-Winchester Major Central Area	79.71	4,876	2,406	91	n/a	75
Whitby Waterfront Place	124.03	6,827	1,386	66	n/a	60
Newcastle Waterfront Place	25.51	235	183	16	n/a	60
Bowmanville Waterfront Place	80.90	299	232	7	n/a	60
Oshawa Waterfront Place	-	1,778	628	-	n/a	n/a
Whitby MTSA	106.79	12,809	7,355	189	150	n/a