

October 7, 2021

Memorandum to: Scott O'Donnell
Town of Halton Hills

From: Daryl Keleher, Senior Director
Altus Group Economic Consulting

Subject: Halton Hills DC
Our File: P-6776

Altus Group Economic Consulting was retained by the Southwest Georgetown Landowners Group to review materials relating to the Town of Halton Hills' forthcoming DC background study and DC by-law update.

This memorandum presents our questions and comments from review of the growth forecasts released by the Town thus far.

QUESTIONS

- 1) The housing forecasts for the Vision Georgetown area have changed significantly from the 2017 DC Study, with the proportion of singles/semis decreased from 63% to 44%, and the share of multiple dwellings increasing from 21% to 41%. It is understood that the revised unit mix reflects the Secondary Plan being adopted by the Town and approved by the Region. However, given on-going appeals, what will the Town's approach be if unit counts or unit mixes are changed through mediation or a future OLT hearing?

Figure 1 Changes to Housing Unit Forecast, Town of Halton Hills, Vision Georgetown

Units by Type	Singles- Semis	Multiples	Apartments	Total
	<i>Units</i>			
2021 DC Study (2022-2036)	2,925	2,705	1,016	6,646
2017 DC Study (2017-2031)	4,232	1,407	1,129	6,768
Share of Units by Type	<i>Percent</i>			
2021 DC Study (2022-2036)	44%	41%	15%	100%
2017 DC Study (2017-2031)	63%	21%	17%	100%

Source: Altus Group Economic Consulting

- 2) The housing forecast for the Georgetown Built-Up Area (BUA) have decreased significantly, with the 15-year housing forecast declining from 4,919 units in the 2017 DC Study to 2,861 units in the 2021 DC materials. The 2017 DC Study was based on an estimated decline in existing population in existing BUA units of 2,099 persons – while the 2021 DC materials estimate that this decline will only

be 368 persons. The reduced decline in existing population in existing units means that fewer housing units are needed in the DC housing forecast to achieve the planned population.

Similarly, Town-wide, over a 15-year period, the 2017 DC Study forecast a decline of 0.146 PPU, or 3,099 persons out of 21,203 existing units, while the 2021 DC materials forecast a decline of only 0.026 PPU, or a decline of 587 persons out of 22,564 units.

What is the basis for the significant reduction in estimated decline in population within existing dwelling units?

Figure 2 Changes to Housing Unit Forecast, Town of Halton Hills, Georgetown Built-Up Area

	Singles-Semis	Multiples	Apartments	Total
<i>Units</i>				
<u>Units by Type</u>				
2021 DC Study (2022-2036)	203	808	1,850	2,861
2017 DC Study (2017-2031)	696	1,037	3,186	4,919
<i>Percent</i>				
<u>Share of Units by Type</u>				
2021 DC Study (2022-2036)	7%	28%	65%	100%
2017 DC Study (2017-2031)	14%	21%	65%	100%
<i>Persons</i>				
<u>Gross Population in New Units</u>				
2021 DC Study (2022-2036)	712	1,902	3,028	5,642
2017 DC Study (2017-2031)	2,422	2,561	4,747	9,731
<i>Decline in Existing Population</i>				
<u>Decline in Existing Population</u>				
2021 DC Study (2022-2036)				(368)
2017 DC Study (2017-2031)				(2,099)
<i>Net Population Increase</i>				
<u>Net Population Increase</u>				
2021 DC Study (2022-2036)				5,274
2017 DC Study (2017-2031)				7,632

Source: Altus Group Economic Consulting

- 3) The population forecast by 2031 in the 2017 DC Study was 91,885 persons but is only 83,823 persons by 2031 in the 2021 DC Study.

The Town's Official Plan sets out the 2031 population and employment targets at 94,000 persons and 40,000 jobs, however the 2021 DC materials show a 2032 population of 83,823 persons, which assuming undercount of 3%, equates to a population of just 86,337 persons, or approximately 7,600 persons less than planned for in the Town's OP.

The 2021 DC materials postpone the achievement of the 91,885 persons (roughly 94,000 persons after accounting for undercount) by 2036, meaning that the 2021 DC calculation would be based on delaying or slowing planned growth by roughly five years.

It is noted that timing has changed due to Regional servicing and planning delays associated with the Vision Georgetown Secondary Plan, however, it is expected that appropriate and proportionate allocations to post-period benefit will be made for all services with a 10-year capital forecast horizon.

Figure 3

Differences in Growth Forecasts, Town of Halton Hills 2017 & 2022 DC Studies

	2017	2022	2027	2031	2036
2017 DC Study					
			<i>Persons</i>		
Population	61,529	65,617	79,506	91,885	
Employment	17,279	20,228	27,423	32,869	
<i>Growth from Prior Period</i>					
Population		4,088	13,889	12,379	
Employment		2,949	7,195	5,446	
<i>Avg. Annual Growth</i>					
Population		818	2,778	3,095	
Employment		590	1,439	1,362	
2021 DC Study					
Population		64,001	71,404	83,823	91,885
Employment		21,096	25,363	29,289	32,873
<i>Growth from Prior Period</i>					
Population			7,403	12,419	8,062
Employment			4,267	3,926	3,584
<i>Avg. Annual Growth</i>					
Population			1,481	2,484	2,016
Employment			853	785	896

Source: Altus Group Economic Consulting based on Town of Halton Hills 2017 DC Study and Materials for 2021 DC Review

- 4) Similarly, the non-residential forecast is delayed by five years, despite employment in 2022 exceeding what the 2017 DC Study forecast for that year – what are the reasons for postponing the non-residential growth in the DC forecast out by five years?
- 5) What are the reasons why the ultimate employment estimate of 32,870 jobs (in both the 2017 DC Study and 2021 DC materials) differs from the Town’s OP forecast of 40,000 jobs by 2031?
- 6) Schedule 6A, used to determine the PPU assumptions, shows apartment units in the Town of Halton Hills having an average PPU of 1.429, while Schedules 4A, 4B, and 5 all utilize PPUs for apartment units of 1.637, which is based on average PPUs for apartments within Halton Region. Why was the Town-specific data on PPUs for apartment units not used?